



## C2M v2.9

### 4.3.2.2 Manage Severance Process

Creation Date: July 25, 2009  
Last Updated: January 29, 2025

**ORACLE®**

**Copyright © 2024, Oracle. All rights reserved.**

**This document is provided for information purposes only and the contents hereof are subject to change without notice.**

**This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission. Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.**

## Contents

BRIEF DESCRIPTION .....	4
BUSINESS PROCESS MODEL PAGE 1 .....	5
BUSINESS PROCESS MODEL PAGE 2 .....	6
BUSINESS PROCESS MODEL PAGE 3 .....	7
BUSINESS PROCESS MODEL PAGE 4 .....	8
BUSINESS PROCESS MODEL PAGE 5 .....	9
BUSINESS PROCESS MODEL PAGE 6 .....	10
BUSINESS PROCESS MODEL PAGE 7 .....	11
DETAIL BUSINESS PROCESS MODEL DESCRIPTION .....	12
TEST ASSETS RELATED TO THE CURRENT PROCESS .....	39
DOCUMENT CONTROL .....	40
ATTACHMENTS:.....	41
<i>Collection Process</i> .....	41
<i>Severance Process</i> .....	42
<i>Account Financial History</i> .....	44
<i>Service Agreement</i> .....	45
<i>Control Central Alerts</i> .....	46
<i>Dashboard</i> .....	47
<i>Account – Credit Rating</i> .....	48
<i>Customer Contact</i> .....	49

## Brief Description

<b>Business Process:</b>	<b>4.3.2.2 C2M.Manage Severance Process</b>
<b>Process Type:</b>	<b>Sub Process</b>
<b>Parent Process:</b>	<b>4.3.2 C2M.Perform Collection Activities</b>
<b>Sibling Processes:</b>	<b>4.3.2.1 C2M.Manage Collection Process, 4.3.2.3a C2M.Manage Pay Plan, 4.3.2.4a C2M.Manage Payment Arrangement, 4.3.2.5a C2M.Manage Late Payment Charge, 4.3.2.6 C2M.Write Off Uncollectable Receivables 4.3.2.7 C2M.Manage Collection Agency Referral.</b>

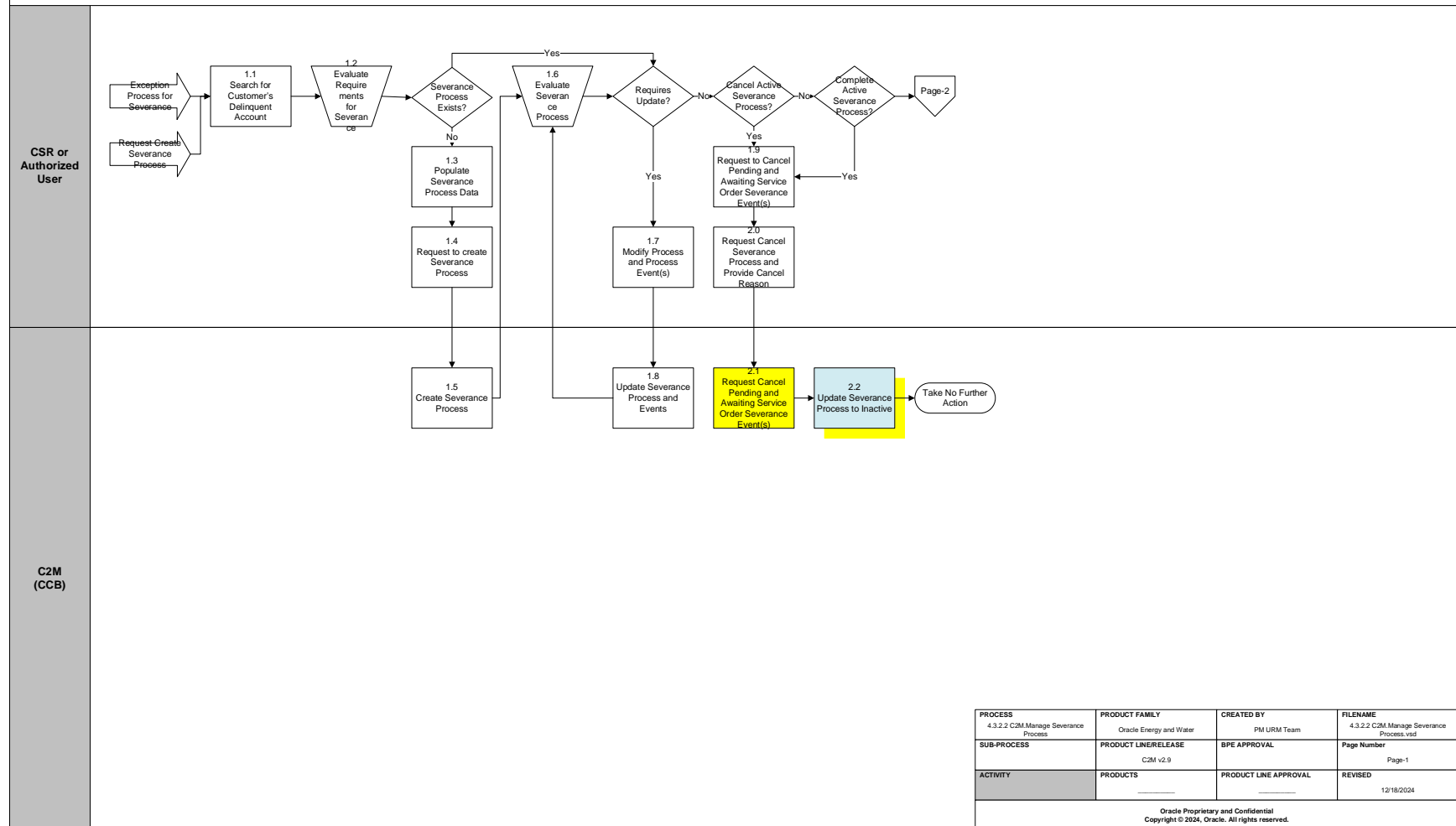
This process describes the management of Severance Processing. Severance Process takes place after collection process if collection process wasn't successful and customer still owes company money. Typical Severance Process is a set of business and system activities that require in order to sever Customer's Service Agreement(s). Severance activities may vary based on the type of service, customer and amount of unpaid debt.

Severance Process is created automatically (as a last Collection activity) or manually and based on the established business rules. When Severance Process is created, system automatically initiates business or system events associated with the given Severance Process (Severance Events) on the specific day. System stops severance real time if Customer's debt is relieved or partially relieved. Authorized User also can monitor and control Severance activities and manipulate with the Severance process and activities linked to the process based on business process needs.

99.9% of all severance processes are created when a "start severance" collection event is activated by the [Collection Event Activator](#) and require no human intervention before they are executed (refer to [How Are Severance Processes Created](#) for information about how the account debt monitor creates severance processes).

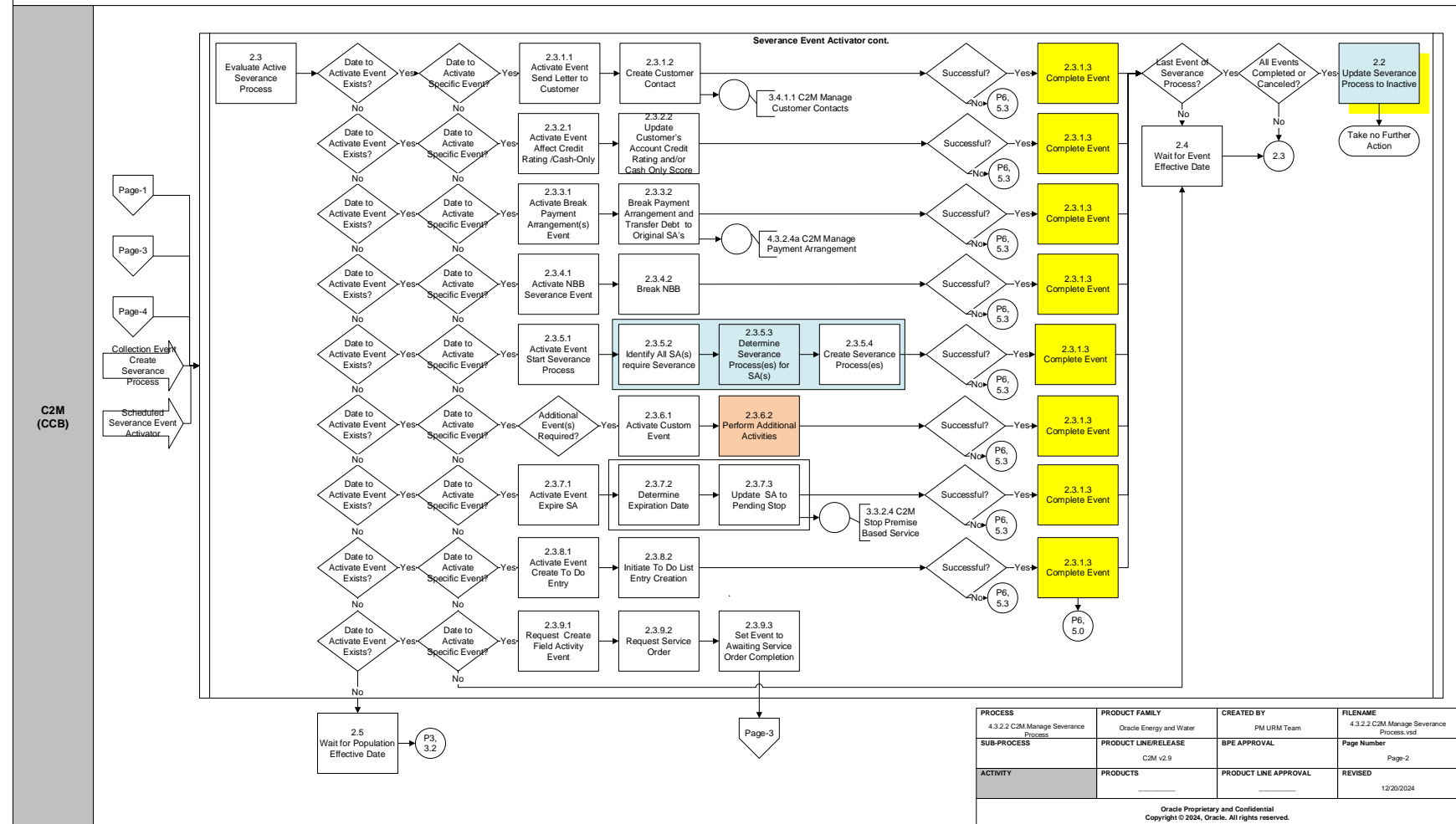
## Business Process Model Page 1

### 4.3.2.2 C2M.Manage Severance Process



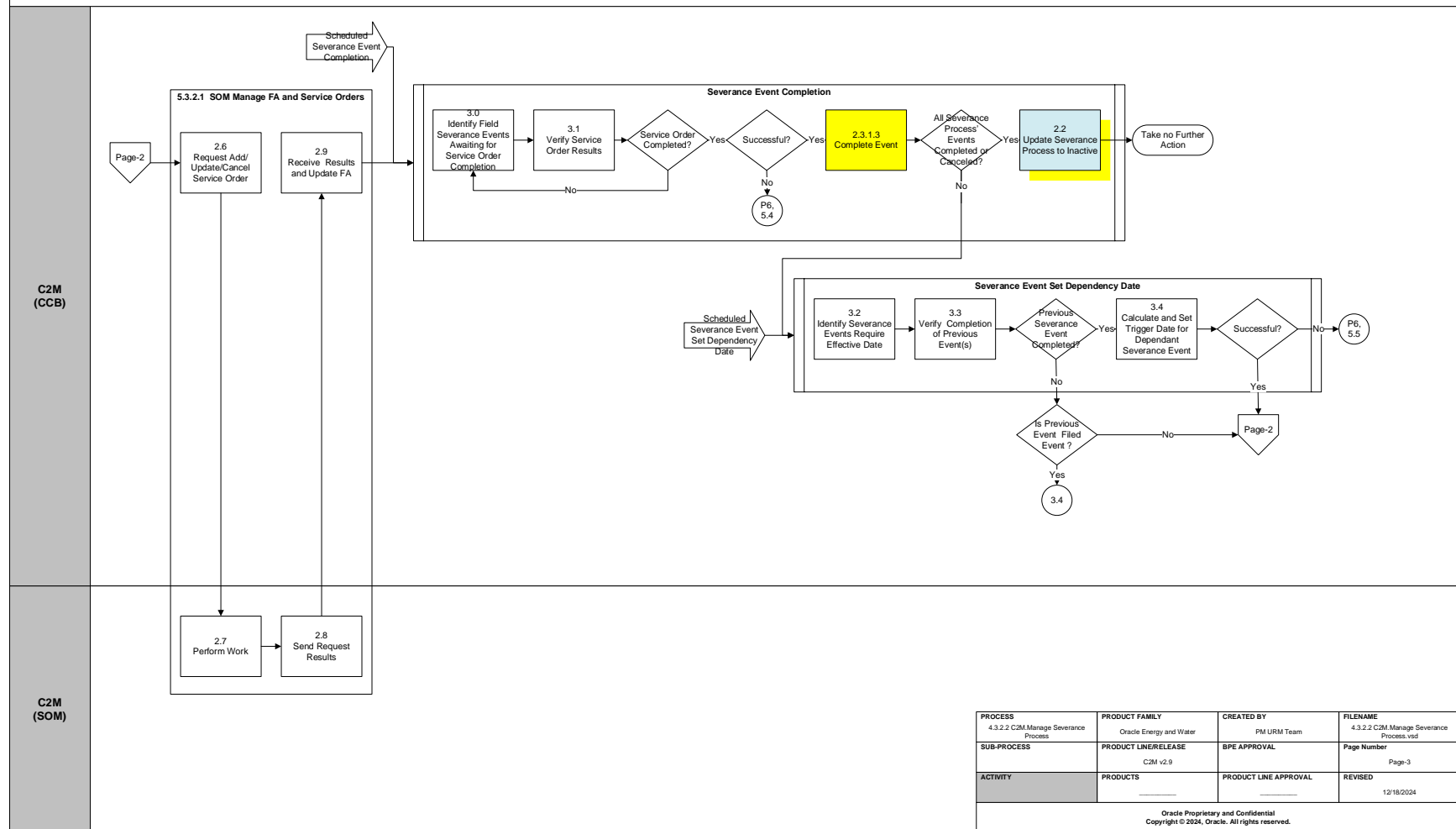
## Business Process Model Page 2

### 4.3.2.2 C2M.Manage Severance Process



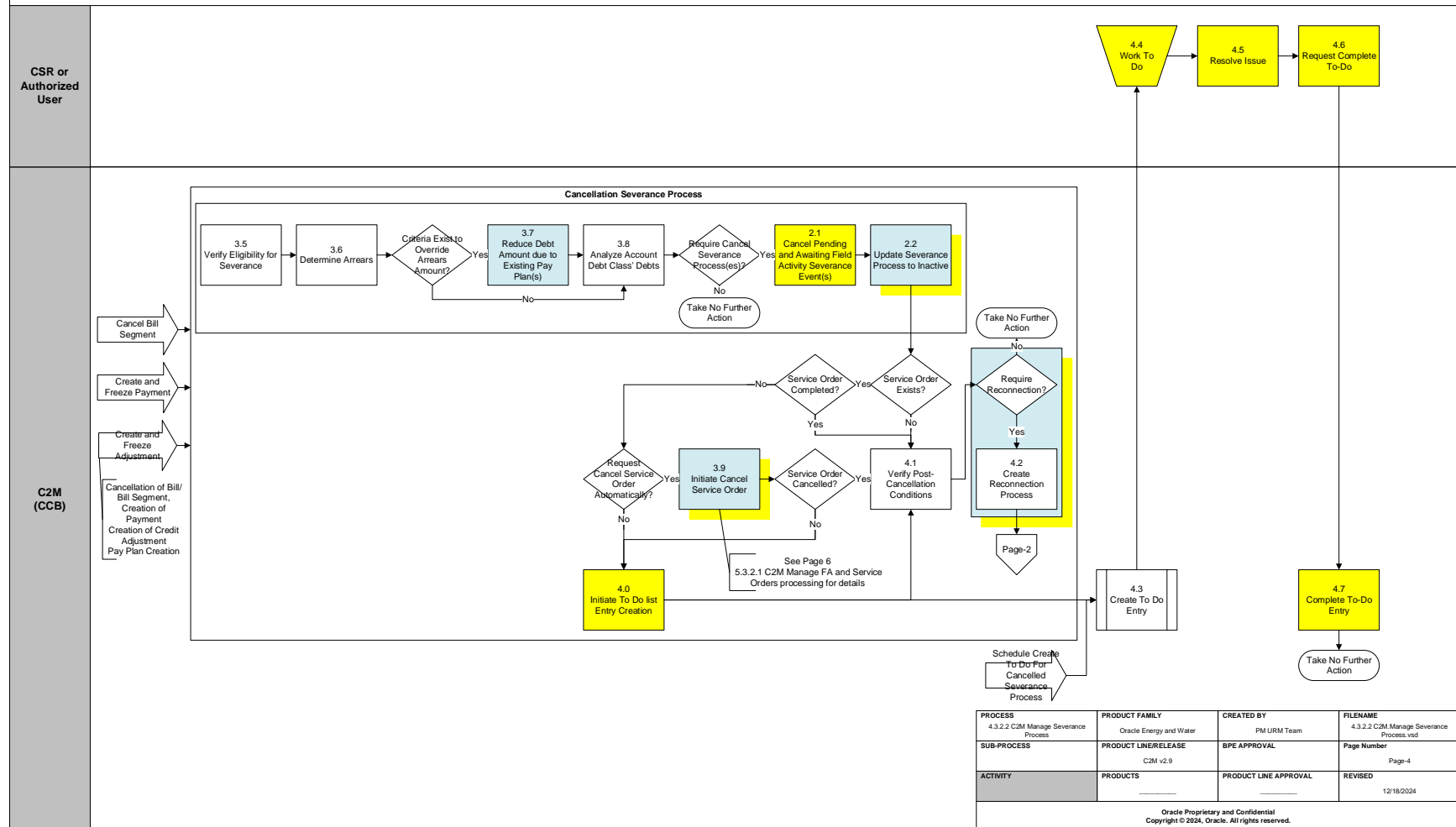
## Business Process Model Page 3

### 4.3.2.2 C2M.Manage Severance Process



## Business Process Model Page 4

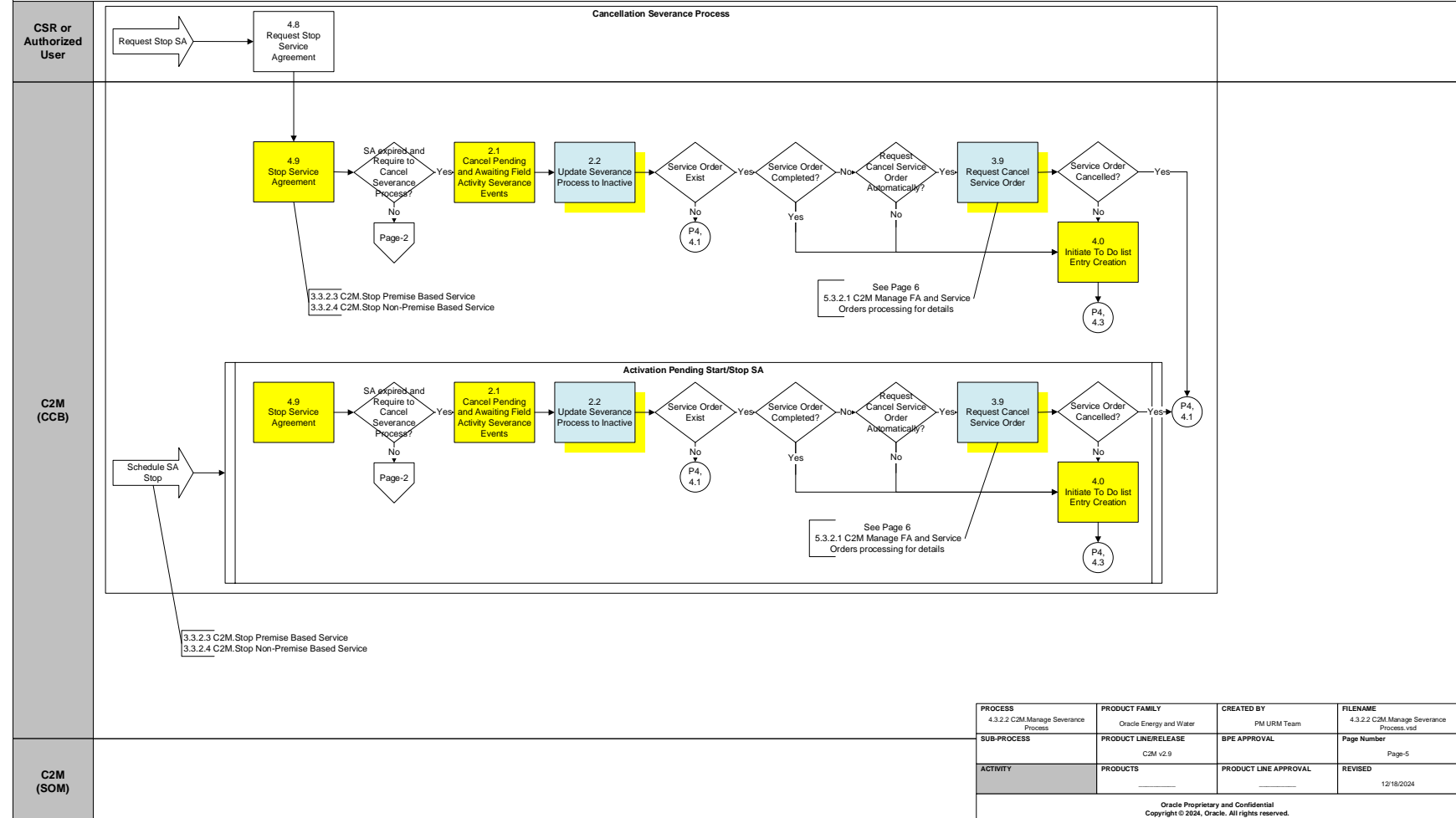
### 4.3.2.2 C2M.Manage Severance Process





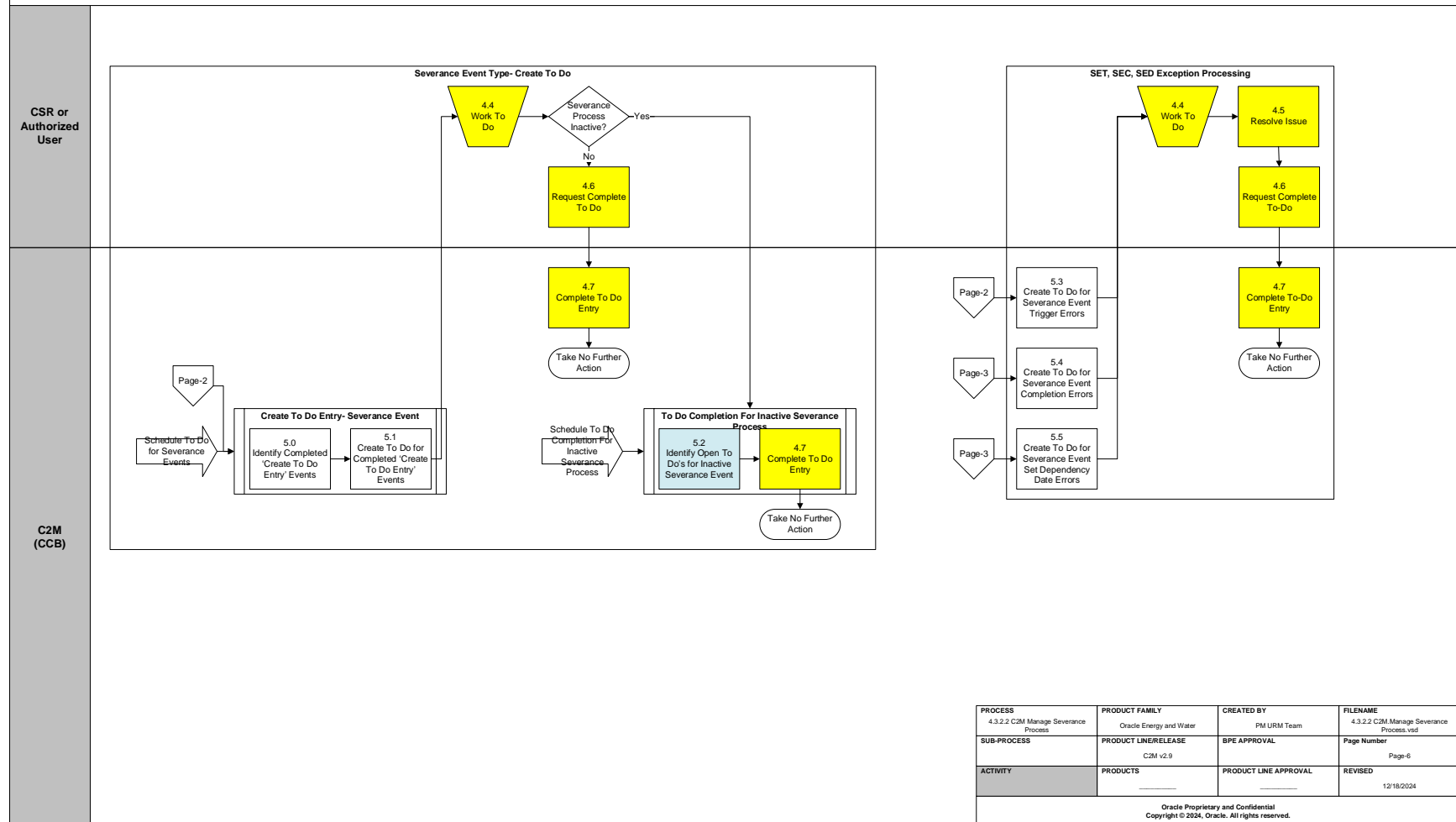
## Business Process Model Page 5

### 4.3.2.2 C2M.Manage Severance Process

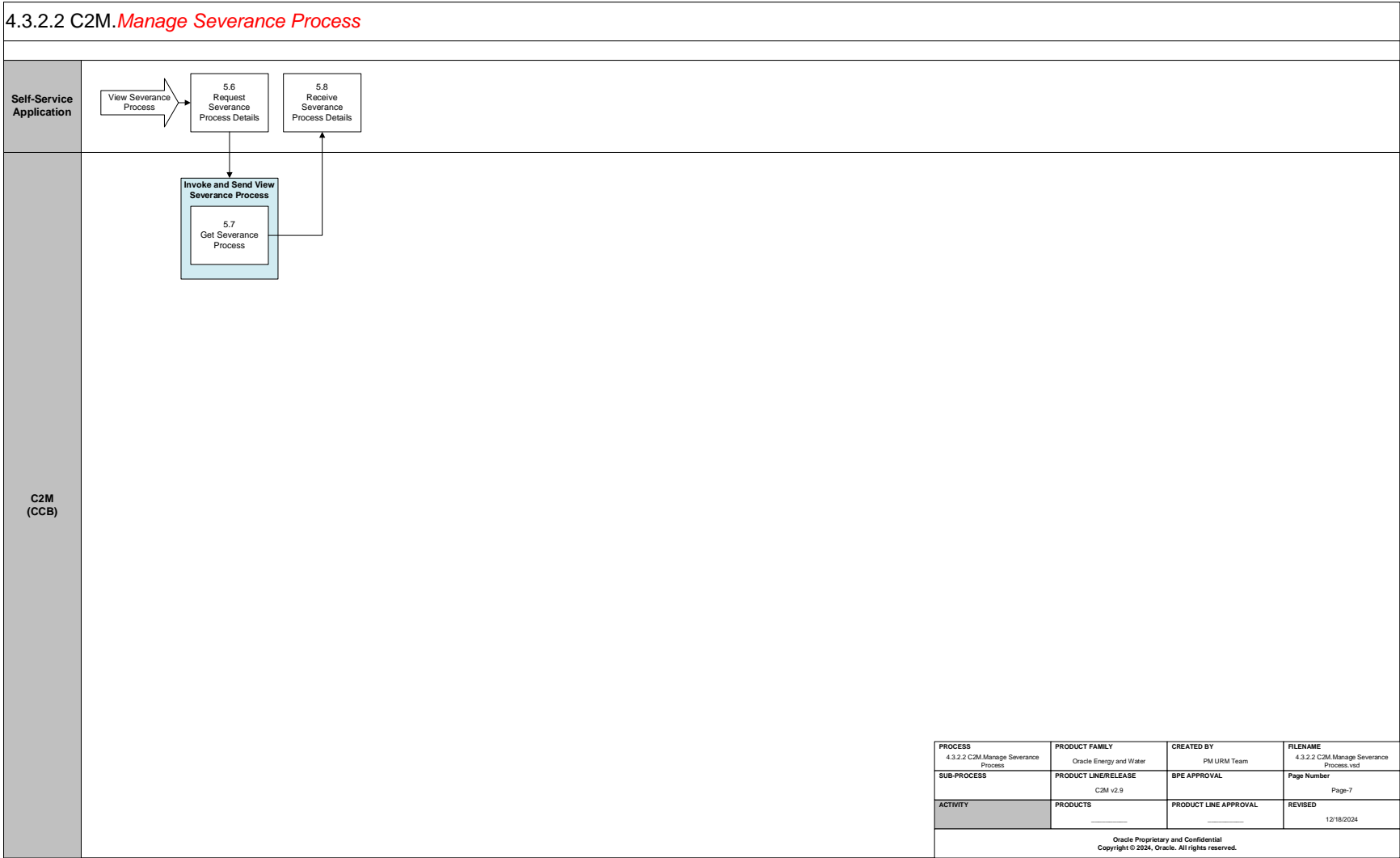


## Business Process Model Page 6

### 4.3.2.2 C2M.Manage Severance Process. To-Do Handling



Business Process Model    Page 7



## Detail Business Process Model Description

### 1.1 Search for Customer's Account

**Actor/Role:** CSR

**Description:**

The CSR or Authorized User accesses Control Central Search to locate the Customer in C2M(CCB). CSR or Authorized User perform the search if there is a need to initiate manually Severance Process or work on existing one.

**Configuration required** Y

**Entities to Configure:**

<a href="#">Installation Options</a>
--------------------------------------

### 1.2 Evaluate Requirements for Severance

**Actor/Role:** CSR

**Description:**

Based on established business rules, the CSR or Authorized User evaluates the customer's delinquent account and associated Service Agreement(s) to determine if Severance Process is required. Control Central Alerts, and other Dashboard information assist the CSR or Authorized User in making decision process. The CSR or Authorized User reviews and consider [Service Agreement Status](#), [Customer Contacts](#), [Account Financial History](#), [Credit and Collection](#) Activities and other pertinent information.

**Process Plug-in enabled** Y

**Available Algorithm(s):**

Control Central Alerts
CI_TL-COL - Collection Timeline

**Configuration required** Y

**Entities to Configure:**

<a href="#">Installation Options - Control Central Alerts</a>
Zone

### 1.3 Populate Severance Process Data

**Actor/Role:** CSR

**Description:**

Based on established business rules, the CSR or Authorized User determines what Severance Process is the best fit for the specific Account's Service Agreement. Usually the CSR or Authorized User tries to use the Severance Template to create the Severance Process. Sometimes the CSR or Authorized User needs to add, subtract or modify events to form a Severance process that satisfies business requirements and criteria. The CSR or Authorized User uses the [Severance](#) Process Screen to populate all the Severance Process related data.

### 1.4 Request to Create Severance Process

**Actor/Role:** CSR

**Description:**

The CSR or Authorized User requests to create Severance Process

**Configuration required Y      Entities to Configure:**

Severance Process Template
Severance Event Type

**Business Object Y      Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

**1.5 Create Severance Process**

**Actor/Role:** C2M(CCB)

**Description:**

Severance Processes can be created Manually or Automatically. Most of the Processes are created automatically.

Automated process: This step is part of Collection process. Create collection process is actually a collection event that creates a Severance Process (see 4.3.2.1 C2M.Manage Collection Process for details for how a Severance process is created automatically).

Manual process: CSR or Authorized User creates Severance process if required by business.

**Configuration required Y      Entities to Configure:**

Collection Class Control
Collection Template
Collection Event Type
Feature Configuration
Severance Process Template
Severance Event Type

**Customizable process N      Process Name:**

CET Collection Event Activator
--------------------------------

**1.6 Evaluate Severance Process**

**Actor/Role:** CSR

**Description:**

The CSR or Authorized User evaluates Severance Process and decides if any changes are required

### **1.7 Modify Process and Process Events**

**Actor/Role:** CSR

**Description:**

The CSR or Authorized User modifies Severance Process and /or Severance Events linked to the Severance process.

Note: CSR or Authorized User can add/remove Severance events to/from the process

### **1.8 Update Collection Process and Events**

**Actor/Role:** C2M(CCB)

**Description:**

System validates and saves the changes made by the CSR or Authorized User.

### **1.9 Request to Cancel Pending and Awaiting Field Activity Severance Events**

**Actor/Role:** CSR

**Description:**

If the CSR or Authorized User decides to cancel or complete a Severance process, the CSR or Authorized User cancels all the pending or awaiting Field Activity Severance Events.

### **2.0 Request to Cancel Severance Process and Provide Cancel Reason**

**Actor/Role:** CSR

**Description:**

If the CSR or Authorized User decides to cancel or complete a Severance process, the CSR or Authorized User requests to cancel the process and provide an appropriate, valid cancellation reason.

### **2.1 Cancel Pending and Awaiting Field Activity Severance Event(s) Group: Severance Event Activator**

**Group: Real Time Cancellation Severance Process**

**Actor/Role:** C2M(CCB)

**Description:**

This step is initiated automatically or manually by CSR or Authorized User

Automated process:

Company's business rules dictate required conditions to cancel Severance Process. Usually Company allows cancellation if:

- Cumulative debt class debt is paid in full
- Cumulative debt class debt amount is below threshold

If this is the case, the system cancels all the pending and awaiting Field Activity Severance Events and transitions the Severance Process to Inactive state.

Manual Process:

CSR or Authorized User Cancels Pending and awaiting Field Activity Severance Events depending on current business needs. This is accomplished by requesting a Cancel which causes a request to be Sent to SOM to Cancel Existing Service Order

**Process Plug-in enabled Y      Available Algorithm(s):**

DC SEV CAN - Severance Process Cancellation. Cancel Severance Process if Debt Class Debt <= Threshold
SEV CAN CRIT - Cancel Sev Process If SA Debt <= Threshold Amount

**Customizable process N      Process Name:**

PUPL - Create Pending Payment Upload Job
--

**Configuration required Y      Entities to Configure:**

Debt Class
Feature Configuration
Workflow

**Customizable process N      Process Name:**

SET - Severance event trigger
BILLING - Billing
PUPL - Payment Upload Process

## 2.2 Update Severance Process to Inactive

**Actor/Role:** C2M(CCB)

**Description:**

Automated process: When all events have been completed or canceled the system transitions the Collection Process to Inactive state.

Manual process: The CSR or Authorized User changes the Severance Process' status

**Customizable process N      Process Name:**

SET - Severance event trigger
SEC - Severance Event Completion
BILLING - Billing
PUPL - Payment Upload Process

**Business Object Y      Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

## 2.3 Evaluate Active Severance Process Group: Severance Event Activator

**Actor/Role: C2M(CCB)****Description:**

This is the first step of the Severance Event Activator background process. Severance Event Tigger periodically reviews active Severance Processes and identifies Severance Events that require activation on the given effective (trigger) date. Prior to activation events, process evaluates Eligibility of the Service Agreement for severance. If SA is stopped, process cancels Severance process for this SA.

**Configuration required Y      Entities to Configure:**

Customer Class Control
Work Calendar

**Customizable process N      Process Name:**

SET - Severance event trigger
-------------------------------

**2.3.1.1 Activate Event Send Letter to Customer Group: Severance Event Activator****Actor/Role: C2M(CCB)****Description:**

The System initiates execution of Severance Event with Type “Send Letter to Customer” on the specified trigger date.

**Business Object Y      Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

**Configuration required Y      Entities to Configure:**

Severance Process Template
Severance Event Type

**Customizable process N      Process Name:**

SET - Severance event trigger
-------------------------------

**2.3.1.2 Create Customer Contact Group: Severance Event Activator****Actor/Role: C2M(CCB)****Description:**

This C2M(CCB) event creates a [Customer Contact](#). If configured, the Customer Contact can initiate a letter to the Customer. See 3.4.1.1 Manage Customer Contacts for details

**Process Plug-in enabled Y      Available Algorithm(s):**



<b>Business Object Y</b>	<b>Business Object:</b>	LTEX-SEV- Create severance event letter extract records
		C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
		Severance Process Template
<b>Customizable process N</b>	<b>Process Name:</b>	Severance Event Type
		Customer Contact Class
		Customer Contact Type
		Letter Template(s)
		SET - Severance event trigger

**2.3.1.3 Complete Event Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

System completes Severance Events after successful execution.

**2.3.2.1 Activate Event Affect Credit Rating/Cash Only Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

The System initiates execution of Severance Event with Type “Affect Credit Rating/Cash Only” on the specified trigger date.

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	

SET - Severance event trigger
-------------------------------

### 2.3.2.2 Update Customer's Account Credit Rating Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) automatically updates the Customer's [Credit Rating](#) and/or [Cash Only Score](#) as defined on the Event Type

**Business Object Y**

**Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

**Configuration required Y**

**Entities to Configure:**

Severance Process Template
Severance Event Type

**Customizable process N**

**Process Name:**

SET - Severance event trigger
-------------------------------

### 2.3.3.1 Activate Event Break Payment Arrangement Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System initiates execution of Severance Event with Type "Break Payment Arrangement" on the specified trigger date.

**Business Object Y**

**Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

**Configuration required Y**

**Entities to Configure:**

Severance Process Template
Severance Event Type

**Customizable process N**

**Process Name:**

SET - Severance event trigger
-------------------------------

### 2.3.3.2 Break Payment Arrangement and transfer debt to Original SA(s) Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

If the Account has a Payment Arrangement, the system will break the Payment Arrangement. When a Payment Arrangement is broken, debt on the Payment Arrangement is transferred back to the original Service Agreement(s). Refer to 4.3.2.4a Manage Payment Arrangement for additional details.

**Process Plug-in enabled Y**      **Available Algorithm(s):**

SEV BREAK PA - Break payment arrangement - severance event
C1-BO-PY-ARR - Bill-Based Payment Arrangement Processing

**Business Object Y**      **Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

**Configuration required Y**      **Entities to Configure:**

Severance Process Template
Severance Event Type

**Customizable process N**      **Process Name:**

SET - Severance event trigger
-------------------------------

#### 2.3.4.1 Activate NBB Severance Event Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

System initiates execution of Severance Event with Type “NBB Severance” on the specified trigger date.

**Business Object Y**      **Business Object:**

C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template

**Configuration required Y**      **Entities to Configure:**

Severance Process Template
Severance Event Type

**Customizable process N**      **Process Name:**

SET - Severance event trigger
-------------------------------

**2.3.4.2 Break NBB Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

If the Account has non-billed budget, the system breaks it by setting up a characteristic.

<b>Process Plug-in enabled Y</b>	<b>Available Algorithm(s):</b>	SVEV-NB - NBB Severance
<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

**2.3.5.1 Activate Event Start Severance Process Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

If only one Service Agreement was nominated for a Severance process and all the activities executed by this time didn't achieve the main goal and the Customer still owes money to the Company, the Company initiates Severance Processes for each Debt class' SA in arrears. Severance Event Start Severance process allows a new Severance Process to be created. This step initiates Severance Process creation on the scheduled date.

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

**2.3.5.2 Identify all SA(s) require Severance Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

The System identifies all the Debt Class' Service Agreements eligible for Severance.

<b>Process Plug-in enabled</b> Y	<b>Available Algorithm(s):</b>	SEV EVT SEV – Cut all other service agreements in the debt class
<b>Business Object</b> Y	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required</b> Y	<b>Entities to Configure:</b>	Severance Process Template Severance Event Type
<b>Customizable process</b> N	<b>Process Name:</b>	SET - Severance event trigger

**2.3.5.3 Determine Severance Process(es) for SA(s) Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

The System applies severance criteria and selects the appropriate Severance Process Template to initiate Severance Process for each identified Service Agreement

<b>Process Plug-in enabled</b> Y	<b>Available Algorithm(s):</b>	SEV EVT SEV – Cut all other service agreements in the debt class SV CRIT LS – Person Life Support Exists SV CRIT MMSA - Sev Criteria - check if SP(s) have a char type/val SV CRIT DFLT - Default (this condition is always true)
<b>Business Object</b> Y	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type

<b>Configuration required</b> Y	<b>Entities to Configure:</b>	C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
		Severance Process Template
		Severance Event Type
		SA Type
<b>Customizable process</b> N	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.5.4 Create Severance Process(es) Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System creates a Severance Process for each SA that has been identified as eligible for Severance Process

<b>Process Plug-in enabled</b> Y	<b>Available Algorithm(s):</b>	SEV EVT SEV - Cut all other service agreements in the debt class
<b>Business Object</b> Y	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required</b> Y	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
		SA Type
<b>Customizable process</b> N	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.6.1 Activate Custom Event Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

In some cases, Company's business practice requires additional activity for severance processes. This step is to incorporate into Severance Process and initiates any additional activity the Company may need.

Note: Custom logic and functionality may be added to any process in any sequence. If business rules require, custom functionality can partially or fully replace existing Collection Events

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.6.2 Perform Additional Activities Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System executes custom functionality included into the Severance process.

<b>Process Plug-in enabled Y</b>	<b>Available Algorithm(s):</b>	SEV EVT SEV - Cut all other service agreements in the debt class
<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.7.1 Activate Event Expire SA Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

In some cases, the Company's business practice requires to expire a Service Agreement System Activates Severance event with type "Expire SA"

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.7.2 Determine Expiration Date Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System identifies Service Agreement's expiration Date based in established business rules

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.7.3 Update SA to Pending Stop Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System updates the Service Agreement's status to Pending Stop.

**Note:** Other processes expire Service Agreements completely when all the criteria for expiration are satisfied. Refer to 3.3.2.2 Stop Premise Based Service



<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.8.1 Activate Event Create To Do Entry Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System initiates execution of Severance Event with Type “Create To-Do Entry” on the specified trigger date.

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required Y</b>	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.8.2 Initiate To Do List Entry Creation Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) prepares information for creation of a To-Do List Entry that causes initiation of the process. A separate background process will create required To-Do list Entry. See Step 4.3 of the current process for details.

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
--------------------------	-------------------------	---

<b>Configuration required</b> Y	<b>Entities to Configure:</b>	C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
		Severance Process Template
		Severance Event Type
		To-Do Type
<b>Customizable process</b> N	<b>Process Name:</b>	To-Do Role
		SET - Severance event trigger

#### 2.3.9.1 Activate Event Create Field Activity Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System initiates execution of Severance Event with Type “Create Field Activity” on the specified trigger date.

<b>Business Object</b> Y	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
		Severance Process Template
		Severance Event Type
<b>Configuration required</b> Y	<b>Entities to Configure:</b>	Severance Process Template
		Severance Event Type
<b>Customizable process</b> N	<b>Process Name:</b>	SET - Severance event trigger

#### 2.3.9.2 Create Service Order Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System creates appropriate Field Activity. Refer to 5.3.2.1 SOM Mange Field Activities and Field Orders.

<b>Business Object</b> Y	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
--------------------------	-------------------------	---

<b>Configuration required Y</b>	<b>Entities to Configure:</b>	C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
		Severance Process Template
		Severance Event Type
		Field Activity Type
		Field Activity Type Profile
		Field Activity Profile Template
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

### 2.3.9.3 Set Event to Awaiting Service Order Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The System updates the Severance Event status to Awaiting Field Activity

### 2.4 Wait for Event Effective Date Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The Severance Event Activator background process (SET) monitors Severance Events and executes Severance Events only on the defined trigger date. Until such date, the Collection Event remains in Pending status.

<b>Business Object Y</b>	<b>Business Object:</b>	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
<b>Customizable process N</b>	<b>Process Name:</b>	SET - Severance event trigger

### 2.5 Wait for Population Effective Date Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

The Severance Event Activator background process (SET) monitors Severance Events and executes Severance Events only if the trigger Date is populated. Until the trigger date is provided, Severance events cannot be activated.

<b>Business Object Y</b>	<b>Business Object:</b>
--------------------------	-------------------------

Customizable process N	Process Name:	C1-SevEvtTypePhysicalBO- Physical BO for Severance Event Type
		SET - Severance event trigger

### 2.6 Request Add/Update/Cancel Service Order Group: 5.3.2.1 SOM Manage FA and Service Orders

**Actor/Role:** C2M(CCB)

**Description:**

The Field Activity and corresponding Service Order for the Service Point are added in C2M and dispatched. Refer to 5.3.2.1 C2M.Manage Field Activity and Service Order for details

### 2.7 Perform Work Group: 5.3.2.1 SOM Manage Field Activity and Service Orders

**Actor/Role:** Field Operations

**Description:**

The Field Operations office receives the Dispatched Field Activity; a technician is routed to the field and performs the required work. Refer to 5.3.2.1 C2M.Manage Field Activity and Service Order for details .

### 2.8 Send Request Results Group: 5.3.2.1 SOM Manage Field Activity and Service Orders

**Actor/Role:** Field Operations

**Description:**

The Results of Field work are returned to C2M(CCB). Refer to 5.3.2.1 C2M.Manage Field Activity and Service Order for details.

### 2.9 Receive Results and Update FA Group: 5.3.2.1 SOM Manage Field Activity and Service Orders

**Actor/Role:** C2M(CCB)

**Description:**

The Service Point Field Activity information is received and FA status is updated in C2M(CCB).

### 3.0 Identify Field Severance Events Awaiting for Service Order Completion Group: Severance Event Completion

**Actor/Role:** C2M(CCB)

**Description:**

This is the first step of Severance Event Completion background process. The Results of Field work are returned to C2M(CCB). Refer to 5.3.2.1 SOM Manage Field Activity and Field Orders Process for details

Customizable process N	Process Name:	SEC Severance Event Completion

### 3.1 Verify Service Order Results Group: Severance Event Completion

**Actor/Role:** C2M(CCB)

**Description:**

The System verifies Field Activity results. If the Field Activity is Completed, the system completes the Severance event. If there is no more pending Severance Events linked to the Severance Process, the system transitions Severance Process to inactive state. The Results of Field work are returned to C2M(CCB). Refer to 5.3.2.1 SOM Manage Field Activity and Field Orders Process for details

**Customizable process N**

**Process Name:**

SEC Severance Event Completion

**3.2 Identify Severance Events Require Effective Date Group: Severance Event Set Dependency Date**

**Actor/Role:** C2M(CCB)

**Description:**

This is the first step of Severance Event Set Dependency Date background process. System identifies Severance Events dependent on Completion of previous Severance Event and requires calculation and setting activation date.

**Customizable process N**

**Process Name:**

SED Severance Event Set Dependency Date

**3.3 Verify Completion of Previous Event Group: Severance Event Set Dependency Date**

**Actor/Role:** C2M(CCB)

**Description:**

In this step the System verifies if previous Severance event has been completed.

**Customizable process N**

**Process Name:**

SED Severance Event Set Dependency Date

**3.4 Calculate and Set Trigger Date for Dependent Severance Event Group: Severance Event Set Dependency Date**

**Actor/Role:** C2M(CCB)

**Description:**

If previous Severance Event has been completed, the system calculates the trigger date for the next Severance Event based on the business rules

**Customizable process N**

**Process Name:**

SED Severance Event Set Dependency Date

**3.5 Verify Eligibility for Severance Group: Cancellation Severance Process**

**Actor/Role:** C2M(CCB)

**Description:**

This task is the first step if cancellation Severance process that takes place every time the system detects arrears reduction activity for the Account. It means that this process is initiated by several business events that cause debt reduction.

The following events cause this process initiation:

- Bill/Bill Segment Cancellation

**Customizable process N      Process Name:**

BILLING - Billing
PUPL - Payment Upload Process

### **3.6 Determine Arrears Group: Cancellation Severance Process**

**Actor/Role:** C2M(CCB)

**Description:**

The System calculates the Customer's arrears for the specific group of Service Agreements linked to Customer's Account. This group is called Debt Class.

**Process Plug-in enabled Y      Available Algorithm(s):**

SEV EVT GEN - Empty Severance Event Algorithm. Sample
--

**Configuration required Y      Entities to Configure:**

Debt Class
SA Type
Severance Process Template

**Customizable process N      Process Name:**

BILLING - Billing
PUPL - Payment Upload Process

### **3.7 Reduce Debt Amount Due To Existing Pay Plan Group: Cancellation Severance Process**

**Actor/Role:** C2M(CCB)

**Description:**

When the System determines a Customer's arrears, it also verifies if there are any additional factors that may affect the debt amount (reduce or increase). System takes into consideration those factors and adjusts the debt amount accordingly. One of the most common factors is a Payment Plan. A pay plan's scheduled payments are treated by the Account Debt Monitor as "pseudo payments" that relieve the Account's debt before it is subjected to the collection criteria.

**Process Plug-in enabled Y      Available Algorithm(s):**

PP OVRD ARS - Pay Plan Override Arrears
---

**Configuration required Y      Entities to Configure:**

Debt Class
------------

**Customizable process N      Process Name:**

BILLING - Billing
-------------------

PUPL - Payment Upload Process
-------------------------------

### **3.8 Analyze Account's Debt and Apply Collection Criteria Group: Cancellation Severance Process**

**Actor/Role:** C2M(CCB)

**Description:**

After calculation of the Account's Debt Class debts (one or more Account's Service Agreement(s) may have same Debt Class) the System analyzes the amount of the debt and makes decision if debt is small enough (or doesn't exists at all) to cancel process. Typically, the Company compares customer debt to the threshold.

**Customizable process N      Process Name:**

BILLING - Billing
-------------------

PUPL - Payment Upload Process
-------------------------------

### **3.9 Initiate Cancel Service Order Group: Severance Event Activator**

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) cancels severance process and its events if its service agreement is stopped.

Severance process is also cancelled real-time whenever its service agreement's debt is reduced below threshold level because of below financial events:

- The cancellation of a bill segment.
- The creation of a payment segment.
- The creation of an adjustment that credits a service agreement.

Upon cancellation, the system automatically requests cancellation of all non-dispatched Field Activities associated with the cancelled Severance process. A request is sent to SOM to cancel current Service Order

**Process Plug-in enabled Y      Available Algorithm(s):**

SFAC-DFLT - Cancel Severance Process Field Activities
---

C2M-SEV-CAN - Cancel severance process if ALL debt <= \$30
--

<b>Configuration required</b> Y	<b>Entities to Configure:</b>	C2M-SEVCANCR - Cancel severance process if debt ≤ \$10
		Installation Options
<b>Customizable process</b> N	<b>Process Name:</b>	Feature Configuration
		Field Activity Type
		Field Activity Type Profile
		Field Activity Profile Template
		SET - Severance event trigger

#### 4.0 Initiate To-Do Entry List Creation Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

When a Severance process is cancelled due to inactive Service Agreements, the system verifies if any pending Field Activities are still linked to the cancelled Severance process. If such a Field Activity exists, C2M(CCB) initiates a To-Do list entry creation. It allows the CSR or Authorized User to analyze the situation and make correct decisions.

<b>Business Object</b> Y	<b>Business Object:</b>	C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
<b>Configuration required</b> Y	<b>Entities to Configure:</b>	To-Do Type
		To-Do Role
<b>Customizable process</b> N	<b>Process Name:</b>	SET - Severance event trigger
		TD-SPRO -To Do for Severance Processes

#### 4.1 Verify Post-Cancellation Conditions Group: Severance Event Activator

**Actor/Role:** C2M(CCB)

**Description:**

When Severance process is cancelled, system verifies if there is a need for additional process associated with Severance process cancellation. System checks if disconnection took place while Severance process was active and decides if reconnection process should be initiated for the service



**4.2 Create Reconnection Process Group: Severance Event Activator****Actor/Role:** C2M(CCB)**Description:**

If after cancellation Severance process business dictates to create reconnect process for the service that has been disconnected as a result of Severance activity, system generates reconnect Severance Process.

**Process Plug-in enabled Y      Available Algorithm(s):**

SEV POST CAN - Reconnect service if service is cut and cust. pays
---

**Business Object Y      Business Object:**

C1-SevProcTemplatePhysicalBO - Physical BO for Severance Process Template
---

**Configuration required Y      Entities to Configure:**

Severance Template
--------------------

**Customizable process N      Process Name:**

SET - Severance event trigger
-------------------------------

TD-SPRO -To Do for Severance Processes
--

**4.3 Create To-Do Entry****Actor/Role:** C2M(CCB)**Description:**

There are situations when a business process requires manual intervention into automated processing of Severance Activities. If such a situation occurs, the System Initiates To-Do list creation processing. (See Collection Event “Create To-Do “ of the current Process for details). A Special background process reviews information stored in the system earlier and creates a To-Do list entry for the CSR or Authorized User to review and analyze.

**Configuration required Y      Entities to Configure:**

To-Do Role
------------

To-Do Type
------------

**Customizable process N      Process Name:**

TD-SPRO- To-Do batch process for Severance processes
--

**4.4 Work To-Do Group: Severance Event Type- Create To Do Group: SET, SEC, SED Exception Processing**

**Actor/Role:** CSR

**Description:**

The CSR or Authorized User reviews and analyzes the provided information and works on the problem.

#### 4.5 Resolve Issue Group: Severance Event Type- Create To Do

Group: SET, SEC, SED Exception Processing

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User determines what needs to be done and enters applicable information in system.

#### 4.6 Request Complete To Do Group: Severance Event Type- Create To Do

Group: SET, SEC, SED Exception Processing

**Actor/Role:** CSR or Authorized User

**Description:**

The CSR or Authorized User marks the To-Do Entry as complete and requests completion of the To-Do Entry. The CSR or Authorized User may add comments or a log entry for future reference.

**Configuration required Y      Entities to Configure:**

To Do Role
To Do Type

**Customizable process N      Process Name:**

F1-TDMON - To-Do Monitor
--------------------------

#### 4.7 Complete To-Do Entry Group: Collection Event Type- Create To Do

Group: SET, SEC, SED Exception Processing

**Actor/Role:** C2M(CCB)

**Description:**

The To-Do Entry is updated to Complete status in C2M(CCB).

#### 4.8 Request Stop Service Agreement

**Actor/Role:** CSR or Authorized User

**Description:**

The Authorized User manually stops the Service Agreement in C2M(CCB).

#### 4.9 Stop Service Agreement

**Actor/Role:** C2M (CCB)

**Description:**

C2M(CCB) cancels severance process and its events if its service agreement is stopped (i.e., when the service agreement's status becomes Stopped). Refer to 3.3.2.3 C2M Stop Premise Based Service and 3.3.2.4 C2M Stop Non-Premise Based Service for details on stop process.

**Customizable process N**      **Process Name:**

SAACT – Activates pending start Service Agreements and stops pending stop Service Agreements when all required information is available.

#### 5.0 Identify Completed 'Create To Do Entry' Events Group: Severance Event Type- Create To Do

**Actor/Role:** C2M(CCB)

**Description:**

There are situations when business process requires manual intervention into automated processing of Severance Activities. If such a situation occurs, system initiates To Do list creation processing. (see Severance Event “Create To Do”, Step 2.3.8.1 of the current Process for details). Special background process reviews information stored in the system earlier (during To Do Severance Event processing) and creates To Do list entry for CSR or Authorized User to review and analyze.

**Process Plug-in enabled Y**      **Available Algorithm(s):**

C1-AUTOCCTDE - Auto-Complete Collection To Do Entries

**Configuration required Y**      **Entities to Configure:**

To Do Role

To Do Type

**Customizable process N**      **Process Name:**

TD-SEVT - To Do batch process

#### 5.1 Create To Do for Completed 'Create To Do Entry' Events Group: Severance Event Type- Create To Do

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) identifies completed 'Create To Do Entry' Severance event and creates To DO list entry for each completed event, for CSR or Authorized User to review and analyze.

**Process Plug-in enabled Y**      **Available Algorithm(s):**

C1-AUTOCCTDE - Auto-Complete Collection To Do Entries

**Configuration required Y**      **Entities to Configure:**

To Do Role

Customizable process N	Process Name:	To Do Type
		TD-SEVT - To Do batch process

### 5.2 Identify Open To Do's for Inactive Collection Event Group: Severance Event Type- Create To Do

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) identifies and automatically completes To Do Entries linked to inactive Severance processes.

Process Plug-in enabled Y	Available Algorithm(s):	C1-AUTOCCTDE - Auto-Complete Collection To Do Entries
Configuration required Y	Entities to Configure:	To Do Role
		To Do Type
Customizable process N	Process Name:	F1-TDMON - To Do Monitor

### 5.3 Create To Do for Severance Event Trigger Errors Group: SET, SEC, SED Exception Processing

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) creates To DO list entry when an error is detected in Severance Event Trigger Process, for CSR or Authorized User to review and analyze.

Configuration required Y	Entities to Configure:	To Do Role
		To Do Type
Customizable process N	Process Name:	SET - Severance Event Trigger

### 5.4 Create To Do for Severance Event Completion Errors Group: SET, SEC, SED Exception Processing

**Actor/Role:** C2M(CCB)

**Description:**

C2M(CCB) creates To DO list entry when an error is detected in Severance Event Completion Process, for CSR or Authorized User to review and analyze.

**Configuration required Y      Entities to Configure:**

To Do Role
------------

To Do Type
------------

**Customizable process N      Process Name:**

SEC - Severance Event Completion
----------------------------------

#### **5.5 Create To Do for Severance Event Set Dependency Date Errors Group: SET, SEC, SED Exception Processing**

**Actor/Role: C2M(CCB)**

##### **Description:**

C2M(CCB) creates To DO list entry when an error is detected in Severance Event Set Dependency Date Process, for CSR or Authorized User to review and analyze.

**Configuration required Y      Entities to Configure:**

To Do Role
------------

To Do Type
------------

**Customizable process N      Process Name:**

SED - Severance Event Set Dependency Date
---

#### **5.6 Request Severance Process Details**

**Actor/Role: Self-Service Application**

##### **Description:**

The Self-Service Application requests to view Severance Process details.

System supports communicating with the external system via RESTful services or via SOAP services. In both cases, the system uses an object called inbound web service (IWS) to store the configuration. A web service class is used to distinguish whether the IWS is used for REST or SOAP.

#### **5.7 Get Severance Process Group: Invoke and Send View Severance Process**

**Actor/Role: C2M(CCB)**

##### **Description:**

The C2M(CCB) will identify the request, will fetch and respond with Severance process details.

**Process Plug-in enabled (Y/N)      Scripts(s):**

C1SeveraProc - Severance Process Service
--

**Web Service(s):**

C1-SeveranceProcess - Severance Process
---

### **5.8 Review Severance Process Details**

**Actor/Role:** Self-Service Application

**Description:**

The Self-Service Application review Severance process details.

## Test Assets related to the Current Process

Testing Asset Sr.No	Testing Asset-Flows	No Of Data sets
1	URM-C2M-4322-001-Auto-Create-Sev-Proc-From-Coll-Proc-Start-Sev-Event	3
2	URM-C2M-4322-002-Manually-Create-Severance-Process	3
3	URM-C2M-4322-003-Update-Existing-Severance-Process	4
4	URM-C2M-4322-004-Trigger-Severance-Event-Via-SET-Batch-Process	4
5	URM-C2M-4322-005-Auto-Cancel-Severance-Process-When-SA-Is-Stopped	1
6	URM-C2M-4322-006-Auto-Cancel-Severance-Process-When-Bill-Segment-Is-Canceled	1
7	URM-C2M-4322-007-Auto-Cancel-Severance-Process-When-Payment-Is-Made	1

## Document Control

### Change Record

Date	Author	Version	Change Reference
07/25/09	Galina Polonsky		No Previous Document
10/22/10	Geir Hedman		Updated Title and Content page
11/20/10	Yoko Iwahiro		Update Business Objects, Algorithms and configuration.
12/22/10	Ayelet Lavee		Final release edit made corrections to table of content, hyperlinks, Attachments.
2/9/11	Geir Hedman		Updated Document and Visio
08/31/17	Joshua Piccott		Updated Document and Visio to v2.6
09/22/17	Don Lee	C2M	Updated to reflect current BO's, Algorithms and reference to new Field Activity processed by SOM
09/25/2017	Galina Polonsky		Reviewed, Approved
09/23/2018	Jerry Chick		Replaced Visio flows with updated versions. Deleted steps 2.6 and 2.7. Added reference to two C2M algorithm types in step 2.4. Numerous grammatical and syntax corrections.
10/20/2018	Galina Polonsky		Reviewed, Approved
6/4/2019	Satya Kalavala		Updated format for v2.7
08/12/2024	Kunal Nerkar		Updated document and Visio for C2M v2.9
09/02/2024	Pablo Siegrist		Reviewed
12/17/2024	Galina Polonsky		Reviewed, Approved



## Attachments:

### Collection Process

Collection Process
Bookmark
Previous Item

Main
SAs
Events

Collection Process
Brazil,Mark S, Inactive(Completed), Residential Standard Utility Debt, Created 04-01-2020

Account ID
3066882735
Brazil,Mark S, Residential, \$1,745.11

Collection Status
Inactive
Reason
Completed
Cancel

Collection Class Control
CA-RES-STD
Residential Standard Utility Debt
Collection Process created for \$1,718.63 overdue longer than 40 days on SAs with debt class STD

Collection Process Template
Risky utility debt

Create Date/Time
04-01-2020 4:14:59

Collection Amount Base Date
02-21-2020
Calculate Date Using
0 Days In Arrears.

Comments

Collection Process - 3067409928 Brazil,Mark S, Inactive(Completed), Residential Standard Utility Debt, Created 04-01-2020

- SA - Amount Still Owing \$177.00 ; California / Electric Residential, ER-DMINU, Active, 01-01-2016, 3062687364
- SA - Amount Still Owing \$133.10 ; California / Waste Water Residential (quart, WWDFLT, Active, 01-01-2016, 3062990044
- SA - Amount Still Owing \$462.35 ; California / Gas Residential, GASDFLT, Active, 01-01-2016, 3063744870
- SA - Amount Still Owing \$946.18 ; California / Water Residential (quarterly), WDFLT, Active, 01-01-2016, 3069252209
- Event - Completed, Risky debt reminder letter, 04-01-2020, 04-20-2020
- Event - Completed, Automated collections call, 04-06-2020, 04-20-2020
- Event - Completed, Start Sev for all SAs in Coll, 04-13-2020, 04-20-2020
- Event - Completed, Affect credit rating by 25 points, 04-13-2020, 04-20-2020
- Debt Class - No collection/severance, Current Balance: \$0.00, Delinquent Debt: \$0.00
- Debt Class - Standard utility debt, Current Balance: \$1,745.11, Delinquent Debt: \$1,718.63

The Account has other active collection activities.

## Severance Process

Severance Process

BookmarkNext ItemClearSaveRefresh

MainEventsFA/CC

Severance Process

Brazil, Mark, California/ Electric Commercial, Standard utility severance, Active (Events Pending), Created 07-29-2024

Severance Process ID4135549411

Service Agreement

4137550349

California / Electric Commercial, ECOM1, Active, 01-01-2017, Standard commercial service, 4137550349

Premise ID

8432425279

2850\_URM-UTA-SD Street, San Francisco, CA, 94105

Severance Status

Active

Reason

Events Pending

Cancel

Severance Process Template

Standard utility severance

Create Date/Time

07-29-2024 3:57:41

Collection Amount

\$23.00

Amount Still Owing

\$23.00

Severance Amount Base Date

05-29-2024

Calculate Date Using

0

Days In Arrears.

Comments

Severance Process - 4135549411 Brazil, Mark, California/ Electric Commercial, Standard utility severance, Active (Events Pending), Created 07-29-2024

Event - Awaiting Field Activity, Disconnect warning, 07-29-2024

Event - Pending, Disconnect service for non-payment,

Event - Pending, Disconnect for non-payment letter,

Event - Pending, Expire service agreement,

Event - Pending, Affect credit rating by 100,

Debt Class - Standard utility debt, Current Balance: \$190.30, Delinquent Debt: \$173.00

Severance Process
Bookmark
Next Item
Clear
Save
Refresh

Main
Events
FA/CC

Severance Process
Brazil, Mark, California/ Electric Commercial, Standard utility severance, Active (Events Pending), Created 07-29-2024
ID 4135549411

Severance Events
"1" of "5"

Event Sequence
10

Severance Event Status
Awaiting Field Activity

Severance Event Type
Disconnect warning

Dep on Other Events
☐

Trigger Date
07-29-2024

Days After Prev Response
0

Completion Date

Severance Process
Bookmark
Next Item
Clear
Save
Refresh

Main
Events
FA/CC

Severance Process
Brazil, Mark, California/ Electric Commercial, Standard utility severance, Active (Events Pending), Created 07-29-2024
ID 4135549411

Severance Events
"1" of "5"

Event
Awaiting Field Activity, Disconnect warning, 07-29-2024
Sequence
10

	Field Activity ID	Field Activity Information	Service Point ID	Service Point Information
Field Activity/SP	8434531613	Field Activity / Disconnect Warning / Customer to Meter / 8434531613 / Communication Error / Create Date Time: 06-01-2020 0:05:45, Field Activity Outbound Communication / Outbound /	8438521604	2850_URM-UTA-SD Street, San Francisco, CA, 94105 / Electric Commercial / Electric / SD-DVC-E-SMART-COM-3741 / Read Cycle 01, Route 100 / Active

	Customer Contact ID	Customer Contact Information
Customer Contact		

## Account Financial History

Account Financial History

Main

Account Financial History ⓘ

Search By

Arrears Date

Expand Filters

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance
1		Late payment charge	\$26.48	\$1,745.11	\$26.48	\$1,745.11
2	08-01-2017	Bill Segment	\$1,560.94	\$1,718.63	\$1,560.94	\$1,718.63
3	08-01-2017	Bill Segment	\$111.69	\$157.69	\$111.69	\$157.69
4	06-01-2017	Bill Segment Cancellation	\$-217.30	\$46.00	\$-217.30	\$46.00
5	06-01-2017	Bill Segment	\$318.30	\$263.30	\$318.30	\$263.30
6	05-18-2017	Pay Segment	\$-319.86	\$-55.00	\$-319.86	\$-55.00
7	05-01-2017	Bill Segment	\$319.86	\$264.86	\$319.86	\$264.86
8	04-08-2017	Pay Segment	\$-808.12	\$-55.00	\$-808.12	\$-55.00
9	04-01-2017	Bill Segment	\$835.18	\$753.12	\$835.18	\$753.12
10	04-01-2017	Xfer balance - printed	\$0.00	\$-82.06	\$0.00	\$-82.06
11	03-18-2017	Pay Segment	\$-400.00	\$-82.06	\$-400.00	\$-82.06
12	03-01-2017	Bill Segment	\$372.94	\$317.94	\$372.94	\$317.94
13	03-01-2017	Non-sufficient funds	\$20.00	\$-55.00	\$20.00	\$-55.00
14	02-22-2017	Pay Segment	\$-442.67	\$-75.00	\$-442.67	\$-75.00
15	02-09-2017	Pay Segment Cancellation	\$422.67	\$367.67	\$422.67	\$367.67
16	02-09-2017	Pay Segment	\$-422.67	\$-55.00	\$-422.67	\$-55.00
17	02-01-2017	Bill Segment	\$422.67	\$367.67	\$422.67	\$367.67
18	01-13-2017	Pay Segment	\$-1,252.84	\$-55.00	\$-1,252.84	\$-55.00
19	01-01-2017	Bill Segment	\$934.93	\$1,197.84	\$934.93	\$1,197.84

## Service Agreement

Service Agreement
Bookmark
Clear
Save
Refresh

Main
Rate Info
SA/SP
Chars, Qty & Rec. Charges
Misc
Contract Options
Billing Scenario
SA Portal

SA Info
California / Electric Commercial, ECOM1, Active, 01-01-2017, Standard commercial service, 4137550349
SA ID
4137550349

SA Status
Active
Activate SA
Cancel SA
Initiate Stop
Stop SA
Close SA
Reinstate SA

Account ID
4138912307
Brazil, Mark, Commercial, \$190.30
CIS Division
California
SA Type
E-COM
California / Electric Commercial
Start Date
01-01-2017
End Date
Maximum Bill Threshold
\$2,000.00
Cutoff Time
2:00:00
Start Day Option
Current Day
Customer Read
No
Allow Estimates
☒
Start Option
NO-DUALFUEL Standard commercial service
Apply New Start Option
Char Premise ID
8432425279
2850\_URM-UTA-SD Street, San Francisco, CA, 94105
Old Account ID
Total Amount to Bill
\$0.00
Expiration Date
Renewal Date

Debt Class
Standard utility debt

Days Old	Arrears Amount
New Charge	\$2.30
2765	\$23.00

Current Balance
\$25.30

SA - California / Electric Commercial, ECOM1, Active, 01-01-2017, Standard commercial service, 4137550349
SP - 2850\_URM-UTA-SD Street, San Francisco, CA, 94105 / Electric Commercial / Electric / SD-DVC-E-SMART-COM-3741 / Read Cycle 01, Route 100 / Active / HTU - Add

## Control Central Alerts

Algorithm Type

BookmarkDuplicateDelete

Main

Algorithm Type

✓ \* C1-SEVPR-ACT 🔍

Description

\* Highlight Active Severance Processes

This control central alert algorithm highlights Active Severance Processes associated with the account in context. ✎

Detailed Description

Algorithm Entity

\* Installation - Control Central Alert ▼

Program Type

\* Java ▼

Program Name

com.splwg.ccb.domain.common.installation.algorithm.controlCentral.SeveranceProcessActiveAlgComp 📄 🔍

		Sequence	Parameter	Required	Owner
+	🗑️	* <input type="text"/>	* <input type="text"/>	<input type="checkbox"/>	

## Dashboard

Program Enrollment

Usage and Billing

Financial History

Payment Agreement

Credit & Collection

Customer Insights

Customer Activity History

Alerts

Full Context

Current To Do

Collection Process - Residential Standard Utility Debt, Risky utility debt, Created: 04-01-2020 4:14:59

Inactive, Conf

Event 10 - Risky debt reminder letter, Trigger Date: 04-01-2020

Completed, 04-20-2020

Customer Contact - Credit and collection contacts / Risky debt reminder letter

Event 20 - Automated collections call, Trigger Date: 04-06-2020

Completed, 04-20-2020

Customer Contact - Credit and collection contacts / Collection auto-dialer call

Event 30 - Start Sev for all SAs in Coll, Trigger Date: 04-13-2020

Completed, 04-20-2020

Event 40 - Affect credit rating by 25 points, Trigger Date: 04-13-2020

Completed, 04-20-2020

SA - Electric Residential - TOU Rate, Active, 08-01-2018

Severance Process - Standard utility severance, Created: 04-20-2020

Active, Events Pending

Event 10 - Disconnect warning, Trigger Date: 04-20-2020

Awaiting Field Activity

FA - Severance Process, Disconnect Warning, Pending, 05-04-2020 23:10:38

Event 20 - Disconnect service for non-payment, Trigger Date: Pending

Dependent on Events: 10

Event 30 - Disconnect for non-payment letter, Trigger Date: Pending

Dependent on Events: 20

Event 40 - Expire service agreement, Trigger Date: Pending

Dependent on Events: 30

Event 50 - Affect credit rating by 100, Trigger Date: Pending

Dependent on Events: 40

Last Contact: 1,592 days ago - Tiamberg,Jonathan

Field Activity Pending

Severance Process Active

Active Lead: Heat Pump Rental - Alliance Air Systems

2 sync request(s) outstanding

Pending Activities Exist

Banks,Beatrice

Banks,Beatrice, Residential, \$260.53

110 Landers St, San Francisco, CA, 94103

110 Landers St, San Francisco, CA, 94103 / Electric Residential / Electric / ER-SM-110 / Active

ER-SM-110 / Electric Smart Meter / Install Date/Time: 08-01-2018 0:00:00 PDT / Connected / Commissioned / Sensus / Active

ER-SM-110 / 1 / Electric Interval kWh - 60 min

Assign me a To Do

## Account – Credit Rating

Account

BookmarkDeleteClearSaveRefresh

MainAuto PayPersonsFinancial BalancesBill MessagesC & CBudgetDepositsCharacteristicsAlertsAccount Portal

AccountBanks,Beatrice, Residential, \$260.53

Account ID98815203280

Collection ClassResidential

Postpone Credit Review UntilLast Credit Review Date09-07-2023

Current Credit Rating1000Current Cash Only Score400

Credit Rating History1" of 1"

Start Date04-20-2020Credit Rating History ID9887952575

End Date04-20-2021Created on 04-20-2020 by Collection Process 9882837828 Event 040

Affect Credit Rating By-25Affect Cash-Only Score By0

Comments



## Customer Contact

Customer Contact: Brazil,Mark, 440554\_URM-UTA-SD Elec Street, San Francisco, CA, 94105 ,...
Add
Search
Bookmark
Refresh

Main
Log

Customer Contact

Main

Information
Brazil,Mark, 440554\_URM-UTA-SD Elec Street, San Francisco, CA, 94105 , Credit and collection contacts / Disconnected letter, Contacted 05-18-2020

Contact Class
Credit and collection contacts

Contact Type
Disconnected letter

User
Radhakrishnan, Reshma

Person
Brazil,Mark

Account
Brazil,Mark, Residential, \$130.87

Premise
440554\_URM-UTA-SD Elec Street, San Francisco, CA, 94105

Preferred Contact Method

Related Records
Linked to Severance Process 1139912831,Event 030 (DISCON-LETTR)

Letter Information
You have been disconnected (CIR-SP-DISCN) will be printed with the next batch.

Print Letter
☒

Record Actions
Edit

Record Information

Characteristics

Characteristic Type
Characteristic Value

Customer Contact Reminders
Add Reminder