

Oracle Utilities Customer Care and Billing Release 2.4.0

Utility Reference Model

3.4.4.1a Enroll in Budget

December 2015

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

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

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

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

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

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

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

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

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

Contents

3.4.4.1a Enroll in Budget

| | |
|-----------------------------------------------------------------------------|---|
| 3.4.4.1a Enroll in Budget | 1 |
| Brief Description | 2 |
| Actors/Roles | 2 |
| Business Process Diagrams | 3 |
| Enroll in Budget Process Model - Page 1 | 3 |
| Enroll in Budget Detailed Process Model Description | 4 |
| 1.0 Search for Customer | 5 |
| 1.1 Review Customer/Account Eligibility for Budget | 5 |
| 1.2 Manage Customer Contacts | 5 |
| 1.3 Request Recommended Budget Calculation | 5 |
| 1.4 Calculate Recommended Budget Amounts | 5 |
| 1.5 Change Amount for Service Agreements | 6 |
| 1.6 Provide Additional Budget Information | 6 |
| 1.7 Update Account Budget Information and SAs Recurring Charge Amount | 6 |
| Installation Options - Control Central Alert Algorithms | 7 |
| Related Training | 8 |

3.4.4.1a Enroll in Budget

This section provides a description of the “Enroll in Budget” business process. It includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Enroll in Budget Process Model - Page 1](#)
- ♦ [Enroll in Budget Detailed Process Model Description](#)
 - ♦ [1.0 Search for Customer](#)
 - ♦ [1.1 Review Customer/Account Eligibility for Budget](#)
 - ♦ [1.2 Manage Customer Contacts](#)
 - ♦ [1.3 Request Recommended Budget Calculation](#)
 - ♦ [1.4 Calculate Recommended Budget Amounts](#)
 - ♦ [1.5 Change Amount for Service Agreements](#)
 - ♦ [1.6 Provide Additional Budget Information](#)
 - ♦ [1.7 Update Account Budget Information and SAs Recurring Charge Amount](#)
- ♦ [Installation Options - Control Central Alert Algorithms](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 3.4.4.1a CC&B.Enroll In Budget

Process Type: Sub-Process

Parent Process: 3.4.2. CC&B.Develop Insight and Understanding

Sibling Processes:

- 3.4.4.2a CC&B.Monitor and True Up Budget
- 3.4.4.3a CC&B.Cancel Budget
- 4.2.2.10a CC&B.Manage Budget Billing
- 4.3.1.1a CC&B.Process Budget Payments
- 3.4.1.1 CC&B.Manage Customer Contacts
- 3.3.2.1 CC&B.Start Premise Based Service

This process describes Enrollment to Budget Plan. A Budget Plan is a leveled payment plan used to spread out seasonal bill variations. It is a common practice for Organizations to offer their customers Budget Plans. A Service Agreement on a Budget has a fixed amount levied on a bill segment, regardless of actual utility charges. While overall the Account references a specific Budget Plan, each Service Agreement has an individual, unique Budget amount. The sum of an Account's Service Agreements' Budget amount is the Account's Budget amount.

Providing Budget Billing service is a complex process, and consists of several sub-processes. Together the processes represent the full lifecycle of Budget Plan functionality: Enrollment in Budget, Monitor and True Up Budget, Manage Budget Billing, Process Budget Payments, and Cancel a Budget.

The Budget Enrollment process allows the CSR or Authorized User to set up a Budget plan upon Customer request. The Customer's Account and Service Agreements must satisfy established Business rules. As a part of enrollment in a Budget plan CC&B offers automatic budget amount calculation. It supports negotiations with the Customer and simplifies the Budget enrollment process overall. Different Budget Plans may be used for various types of customers.

A Budget Plan may be set up for a Customer at time of Start Service, or at any time during the lifecycle of an active Service Agreement.

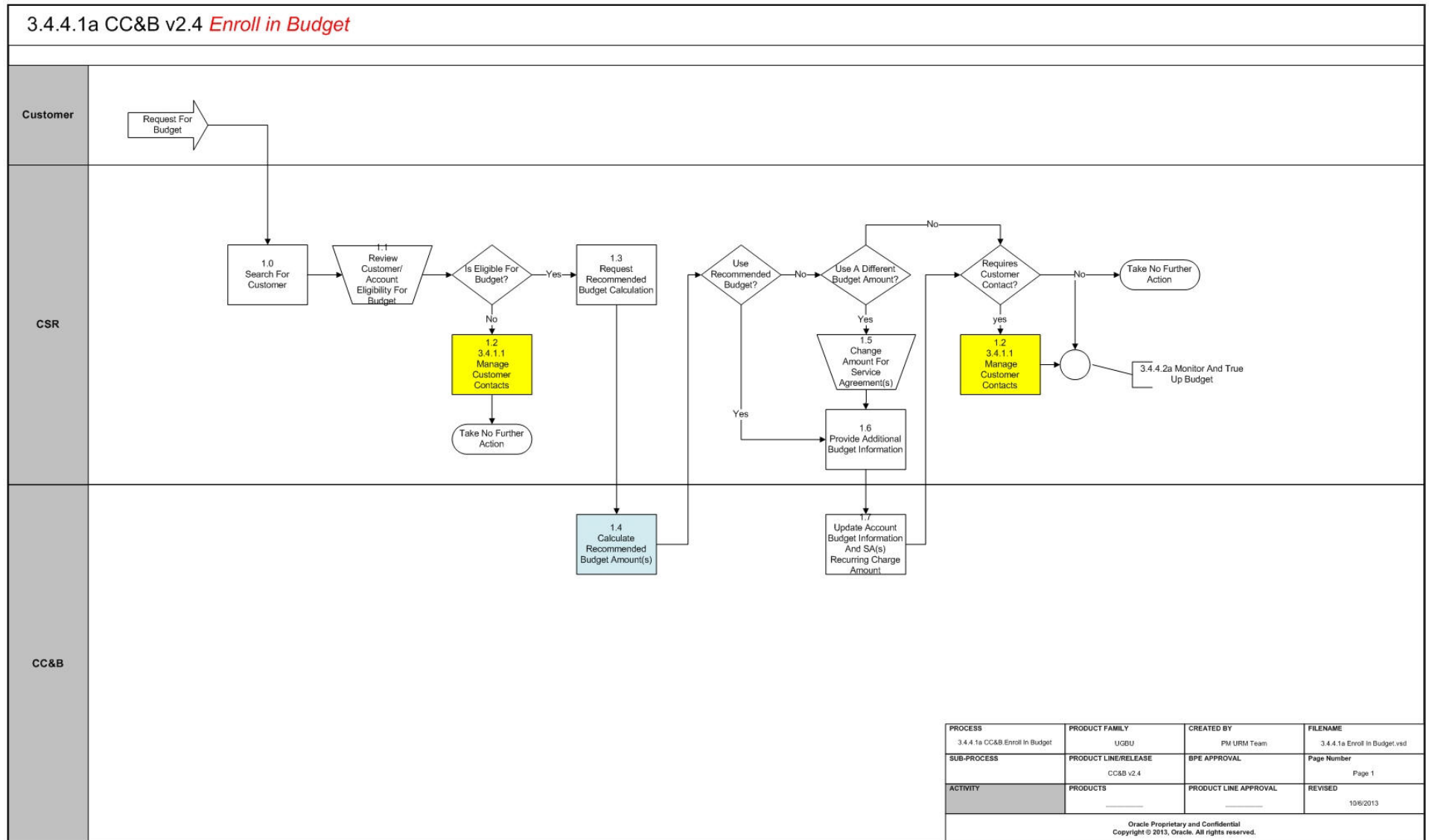
Actors/Roles

The Enroll in Budget business process involves the following actors and roles.

- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR:** CSR or Authorized User of the Customer Care and Billing application.

Business Process Diagrams

Enroll in Budget Process Model - Page 1



Enroll in Budget Detailed Process Model Description

This section provides a detailed description of the “Enroll in Budget” business process, including:

- ♦ 1.0 Search for Customer
- ♦ 1.1 Review Customer/Account Eligibility for Budget
- ♦ 1.2 Manage Customer Contacts
- ♦ 1.3 Request Recommended Budget Calculation
- ♦ 1.4 Calculate Recommended Budget Amounts
- ♦ 1.5 Change Amount for Service Agreements
- ♦ 1.6 Provide Additional Budget Information
- ♦ 1.7 Update Account Budget Information and SAs Recurring Charge Amount

1.0 Search for Customer

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request or inquiry for budget, the CSR or Authorized User locates the customer in CC&B using Control Central Search.

1.1 Review Customer/Account Eligibility for Budget

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There is dialogue with Customer. The CSR or Authorized User evaluates the account. Usually Account Financial History, Billing History, Credit Rating, and Credit and Collection History are reviewed. It is recommended to review Control Central Alerts as well. Control Central Alerts provide the CSR or any Authorized User with valuable insight for overall analysis of the customer and assist in determining eligibility for Budget.

Available Algorithms

- [Installation Options - Control Central Alert Algorithms](#)

1.2 Manage Customer Contacts

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established Business Rules the CSR or Authorized User enters a Customer Contact to document Customer request. Refer to process 3.4.1.1 Manage Customer Contacts.

1.3 Request Recommended Budget Calculation

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If Customer is eligible for Budget, the CSR or Authorized User requests to calculate automatically the Recommended Budget Amount using the “Recommend” function on the Account/Budget page. CC&B allows automatic calculation for the recommended Budget amount for large Customers with more than 100 service Agreements. If more than 100 service agreements exist, a CSR or Authorized Personnel uses “Calculate and Apply” function to obtain the recommended Budget amount. Based on further discussion with the Customer, the CSR may use the recommended Budget amounts or make changes to some or all of the eligible Service Agreements.

1.4 Calculate Recommended Budget Amounts

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B calculates the recommended Budget amount for eligible SA’s based on the Account’s configured Budget Plan and provides CSR or Authorized User results of calculations for review and analysis.

Process Names

- CI_CBUDCALC (alg type BUDCALC-BH) - Calculate Budget using Average of last 6 months + 5%, round up to nearest \$50
- CI_RBUDCALC – Calculate Budget using Average of last 12 months + 5%
- C1-BUD-ELIG - Budget Ineligible If SA Char Exists

Entities to Configure

- Budget Plan
- Customer Class/Controls
- SA Type

1.5 Change Amount for Service Agreements

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CSR

Description: During discussion with Customer, the CSR or Authorized User decides the recommended Budget amount cannot be used. He/she populates mutually agreed upon Budget amounts for each eligible Service Agreement.

1.6 Provide Additional Budget Information

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User follows established business rules and finalizes list of Service Agreements that participate in Budget plan, and updates all the Budget related details for eligible Service Agreements. See Account/Budget Page and Service Agreement/Recurring Charge Page to view details.

1.7 Update Account Budget Information and SAs Recurring Charge Amount

Reference: See [Enroll in Budget Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Account Budget information is updated, and the individual recurring charge effective date and amounts are stored for each Service Agreement. If the Budget information is entered on the Start Service confirmation window, the system will populate the Budget information on the Account and update the effective date and recurring charge amount for the Service Agreements.

See also True Up process (3.4.4.2a Monitor and True Up Budget).

Installation Options - Control Central Alert Algorithms

The following installation options are available:

| Value | Description |
|--------------|------------------------------------------------------|
| C1_CASH-DF | Cash Only Account |
| C1_COLLRF-DF | Highlight Active Collection Agency Referral |
| C1_CRRT-DF | Credit Rating Alert |
| C1_LSSL-DF | Highlight Life Support/Sensitive Load on Person |
| C1_LSSLPR-DF | Highlight Life Support/Sensitive Load on Premise |
| C1_PENDST-DF | Highlight Pending Start Service Agreements |
| C1_SEVPR-DF | Highlight Active Severance Processes |
| C1-CCAL-CASE | Highlight open cases |
| C1-CCAL-CLM | Highlight Open Rebate Claims |
| C1-CCAL-OCBG | Highlight Open Off Cycle Bill Generation |
| C1-COLL-DF | Highlight Active Collection Processes |
| C1-OPN-MEVT | Highlight Open and Distributed Match Events |
| C1-PENDST-DF | Highlight Pending Start Service Agreement |
| C1-PPBALERT | Prepay Biller Task Alert |
| CCAL-CASE | Highlight Open Cases |
| CCAL-DECL | Highlight Effective Declarations for Acct and Prem |
| CCAL-FAERMSG | Highlight FAs with outstanding outgoing messages |
| CCAL-TD | Highlight outstanding To Do entries |
| CCAL-WF | Account or Premise linked to Active Workflow Process |
| CI_CBUDMON | Highlight customer if budget amount > 20% off |
| CI_CCAL_DECL | Highlight effective declarations for acct and prem |
| CI_CCAL-TD | Highlight open To Do entries |
| CI_OD-PROC | Highlight Active Overdue Processes |
| CI_RBUDMON | Highlight customer if budget amount > 30% off |
| CI_STOP-SA | Highlight Stopped SA's |
| CI_WO_BILL | Highlight Written off Bills |
| F1-SYNRQALRT | Retrieve Outstanding Sync Request |
| PP BY STATUS | Count Pay Plans |
| PP OVRD ARS | Pay Plan Override Arrears |

Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data