

Oracle Utilities Customer Care & Billing Release 2.4.0

Utility Reference Model

3.4.4.2b Renew Non-Billed Budget

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Oracle Utilities Customer Care & Billing Utility Reference Model 3.4.4.2b Renew Non-Billed Budget, Release 2.4.0

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3.4.4.2b Renew Non-Billed Budget

This section provides a description of the “Renew Non-Billed Budget” business process. It includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [Renew Non-Billed Budget Process Model - Page 1](#)
- ♦ [Renew Non-Billed Budget Detailed Process Model Description](#)
- ♦ [Installation Options - Control Central Alerts](#)
- ♦ [Related Training](#)

Brief Description

Business Process: 3.4.4.2b CC&B.Renew Non-Billed Budget

Process Type: Sub-Process

Parent Process: 3.4.2 Develop Insight and Understanding

Sibling Processes:

- 4.3.1CC&B.Perform Settlement Activities
- 4.1.1.4 CC&B.Develop Arrears Procedures
- 4.2.2CC&B.Manage Bill
- 3.4.1 CC&B.Manage Contacts
- 3.3.2.2 CC&B.Start Non-Premise Based Service
- 3.3.2.4 CC&B.Stop Non-Premise Based Service

This process describes the activities associated with updating as well as renewal for a Non Billed Budget.

A Non-Billed Budget can be renewed either manually or via a background process. When the Non-Billed Budget SA is created, the expiration date, renewal date and the Recommendation Rule used to create the initial budget are kept with the SA. A renewal flag on the Non-Billed Budget SA type controls if a renewal is required, optional or not allowed. The renewal date is defaulted on to an SA based on the value of the Days Before Expiration for Renewal field on the SA type.

An algorithm on the SA type can customize the processing required to renew an SA.

A user can manually launch the renewal process by clicking Renew on the Non-Billed Budget maintenance page.

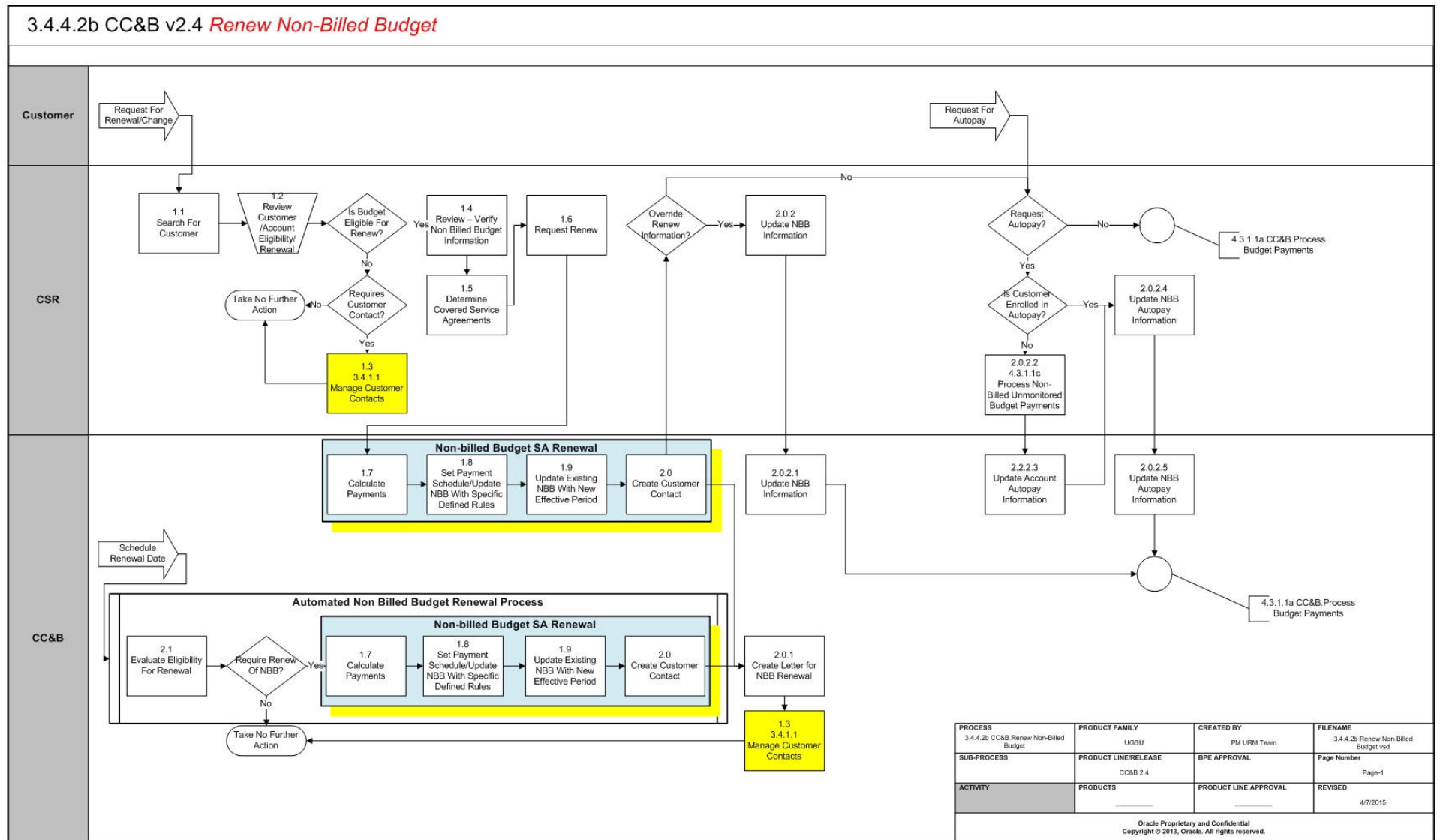
Actors/Roles

The Renew Non-Billed 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.
- **Document Management Software:** Document Management Software that allows create and maintain paper or paperless documents and manage document workflow.
- **Customer:** Authorized user of the Customer Care and Billing application.

Business Process Diagrams

Renew Non-Billed Budget Process Model - Page 1



Renew Non-Billed Budget Detailed Process Model Description

This section provides a detailed description of the “Renew Non-Billed Budget” business process, including:

- ♦ 1.1 Search for Customer
- ♦ 1.2 Review Customer/Account Eligibility/Renewal
- ♦ 1.3 3.4.1.1 Manage Customer Contacts
- ♦ 1.4 Review - Verify Non Billed Budget Information
- ♦ 1.5 Determine Covered Service Agreements
- ♦ 1.6 Request Renewal
- ♦ 1.7 Calculate Payments
- ♦ 1.8 Set Payment Schedule/Update NBB with Specific Defined Rules
- ♦ 1.9 Update Existing NBB with New Effective Period
- ♦ 2.0 Create Customer Contact
- ♦ 2.0.2 Update Non-Billed Budget Information
- ♦ 2.0.2.1 Update Non-Billed Budget Information
- ♦ 2.0.2.2 4.3.1.1c Process Non-Billed Unmonitored Budget Payments
- ♦ 2.0.2.3 Update Account Autopay Information
- ♦ 2.0.2.4 Update Non-Billed Budget Autopay Information
- ♦ 2.0.2.5 Update Non-Billed Budget Autopay Information
- ♦ 2.0.1 Create Letter for Non-Billed Budget Renewal
- ♦ 2.0.1.1 Extract Letter
- ♦ 2.0.1.2 Print Letter
- ♦ 2.0.1.3 Send Letter
- ♦ 2.0.1.4 Receives Letter
- ♦ 2.1 Evaluate Eligibility for Renewal

1.1 Search for Customer

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Upon receipt of request for renewal or inquiry for Non Billed Budget Billing the CSR or Authorized User accesses Control Central Search to locate the customer in CC&B. There are a number of algorithms that can be stored on Installation Options for Control Central Alerts. These algorithms provide the CSR or Authorized User with valuable insight for overall analysis of the customer.

Available Algorithms

- [Installation Options - Control Central Alerts](#)

1.2 Review Customer/Account Eligibility/Renewal

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: There is dialogue with Customer. The CSR or Authorized User evaluates the account. Account Financial History, Premise and Service Agreement Billing History, Credit Rating, and Credit and Collection History may be reviewed. Control Central Alerts assist the CSR or Authorized User in determining continued eligibility based on established business rules for Non Billed Budget.

Available Algorithms

- [Installation Options - Control Central Alerts](#)

1.3 3.4.1.1 Manage Customer Contacts

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Associated with established Business Rules the CSR or Authorized User enters necessary information about the Non Billed Budget Plan for the Customer. Refer to 3.4.1.1. Manage Customer Contacts.

Entities to Configure

- Customer Contact Class, Customer Contact Type

1.4 Review - Verify Non Billed Budget Information

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User has dialogue with the customer and reviews the past Non Billed Budget information. The account may have more than one Non-Billed Budget SA.

1.5 Determine Covered Service Agreements

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: All SAs configured as eligible for Non Billed Budget will be listed. The CSR or Authorized User confirms the Service Agreements to be considered for Non Billed Budget.

1.6 Request Renewal

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User requests renewal of the Non-Billed Budget.

1.7 Calculate Payments

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The SA renewal algorithm for the Non-Billed Budget SA type is called and determines the current Recommendation Rule and executes the associated payment schedule algorithm. The CC&B base package only handles service-point related SA's.

Entities to Configure

- Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA's eligible for NBB

Available Algorithms

- SARN-NB - Determines the current Recommendation Rule for a Non-Billed Budget SA and executes the associated payment schedule algorithm to generate a new schedule.
- NBDA-DA - this algorithm type calculates the Average Daily Amount.

Business Objects

- C1-NBBRulePhysicalBO- Physical BO for Non-billed Budget Rule

1.8 Set Payment Schedule/Update NBB with Specific Defined Rules

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Recommendation Rule establishes the amount to be paid and payment due dates. Rounding Rule, Rounding Unit, Day of Month, # of Payments, True Up Rule for outstanding balances are included as parameters of the recommendation rule. The Non-Billed Budget Payment Schedule algorithm generates a recommended payment schedule for a Non-Billed Budget. The expiration and renewal dates are also calculated.

Process Names

- SARENEW - The service agreement renewal process renews all active SAs that are due for renewal (i.e. where the renewal date is populated and is less than or equal to the process date).

Entities to Configure

- Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA's eligible for NBB

- To do Type TD-SARN SA renewal error - Created when the batch process SARENEW has an error

Available Algorithms

- SARN-NB - Determines the current recommendation rule for a Non-Billed Budget SA and executes the associated payment schedule algorithm to generate a new schedule. NBPS-MON or NBPS-PS - algorithm type is used to generate payment schedule and to establish other specific defined parameters.

1.9 Update Existing NBB with New Effective Period

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: If the Non-Billed Budget is configured for renewal, it is updated with a new effective renewal and expiration dates.

Entities to Configure

- Associated Algorithm, Recommendation Rule, SA Type for Non Billed Budget, and define SA's eligible for NBB.

Available Algorithms

- NB-PS-MON or NBPS-PS algorithm - The new schedule is appended to the Non-Billed Budget SA and the renewal and expiration dates are updated accordingly.

2.0 Create Customer Contact

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: If configured, a customer contact will be created automatically.

Entities to Configure

- Customer Contact Class and Type

Available Algorithms

- SARN-NB - in addition to described above this algorithm. If a Customer Contact Class and Customer Contact Type are specified, a customer contact is created and linked to the main person associated with the account.

2.0.2 Update Non-Billed Budget Information

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on established Business Rules the CSR or Authorized User may override the payment schedule amounts or number of payments. The payment schedule may require updating based on a change to the start date or an expected up-front payment from the customer. Based on established Business Rules the CSR or Authorized User may change the expiration date or renewal date.

2.0.2.1 Update Non-Billed Budget Information

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Non-Billed Budget information is then updated in CC&B.

2.0.2.2 4.3.1.1c Process Non-Billed Unmonitored Budget Payments

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: Based on established business rules the CSR or Authorized User will gather autopay information from the customer and enter this information at the Account level.

2.0.2.3 Update Account Autopay Information

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: Autopay information is updated in CC&B.

2.0.2.4 Update Non-Billed Budget Autopay Information

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User chooses the option to allow autopay for the Non-Billed Budget.

2.0.2.5 Update Non-Billed Budget Autopay Information

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The Non-Billed Budget autopay information is updated in CC&B.

2.0.1 Create Letter for Non-Billed Budget Renewal

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: If configured, CC&B will create a letter to be sent to the customer. A letter template is identified and associated with the Customer Contact Type.

Entities to Configure

- Letter Template and Template defined on associated Customer Contact Type

2.0.1.1 Extract Letter

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: The letter information is extracted in CC&B and sent to assigned software used to print the letter. There are various algorithms associated with different letter templates.

Process Names

- LTRPRT - Letter Extract - The customer contact letter download process creates the flat files that are interfaced to your letter print software to print letters associated with letter-oriented customer contacts. This process extracts all customer contact records associated with its batch control ID that are marked with a supplied run number. If a run number is not supplied, the process uses all customer contact records associated with its batch control ID that are marked with the current run number.

Entities to Configure

- Letter Template includes identification of the Batch Control and Letter Extract Algorithms

Available Algorithms

- Various algorithms - Two algorithm types included in base package are LTEXGEN - Generic Letter Extract, C1-LTREX-RPT - Create letter using reporting engine

2.0.1.2 Print Letter

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Document Management Software

Description: The Letter is prepared and printed for the Customer.

2.0.1.3 Send Letter

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Document Management Software

Description: The Letter is sent to the Customer.

2.0.1.4 Receives Letter

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: The Customer receives the letter.

2.1 Evaluate Eligibility for Renewal

Reference: [Renew Non-Billed Budget Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B will review the Account's Non-Billed Budget Information and determine if the Active Non-Billed Budget is eligible for renewal.

Process Names

- SARENEW - The service agreement renewal process renews all active SAs that are due for renewal (i.e. where the renewal date is populated and is less than or equal to the process date).

Installation Options - Control Central Alerts

The following installation options are available:

PP-Active	Show Count of Active Pay Plans
PP-Broken	Show Count of Broken Pay Plans
PP-Kept	Show Count of Kept Pay Plans
CC-PPDENIAL	Count Pay Plan Denial Customer Contacts
CCAL WFACCTX	Display Active WF for Account Based on Context
CCAL WFPREMX	Display Active WF for Premise Based on Context
CCAL WFACCTR	Display active WF for account based on char
CCAL WFPREMR	Display active WF for premise based on char
CCAL-TD	Highlight Outstanding To Do Entries
CCAL-DECL	Highlight Effective Declarations for Account and Premise
CCAL-CASE	Highlight Open Cases
CCAL-FAERMSG	Highlight FA's with outstanding outgoing messages
CI_WO_BILL	Highlight Written off Bills
CI_OD-PROC	Highlight Active Overdue Processes
CI_OMF_DF	Highlight Open and Disputed Match Even
CI_STOPSA-DF	Highlight Stopped SA's
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-DF	Highlight Active Collection Processes
C1_COLLRF-DF	Highlight Active Collection Agency Referral
C1_PENDST-DF	Highlight Pending Start Service Agreements
C1_CASH-DF	Cash Only Account
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_SEVPR-DF	Highlight Active Severance Processes
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
F1-SYNRQALRT	Retrieve Outstanding Sync Request

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