

**Oracle Utilities Customer Care and Billing
Release 2.4.0**

Utility Reference Model

3.4.4.3a Cancel Budget

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Oracle Utilities Customer Care and Billing Utility Reference Model 3.4.4.3a Cancel Budget, Release 2.4.0

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3.4.4.3a Cancel Budget

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

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
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- ♦ [Cancel Budget Detailed Process Model Description](#)
 - ♦ [1.0 Search for Customer](#)
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- ♦ [Installation Options - Control Central Alert Algorithms](#)
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Brief Description

Business Process: 3.4.4.3a Cancel Budget

Process Type: Sub-Process

Parent Process: 3.4.2. Develop Insight and Understanding

Sibling Processes:

- 3.4.4.2a Monitor and True Up Budget
- 3.4.4.3a Enroll in Budget
- 4.2.2.10a Manage Budget Billing
- 4.3.1.1a Process Budget Payments
- 4.3.2.1 Manage Collection Process
- 3.4.1.1 Manage Customer Contacts

This process describes the process used to cancel a Budget Plan. The process can be initiated by:

- Customer Inquiry
- Collection Process Event
- Stop Service

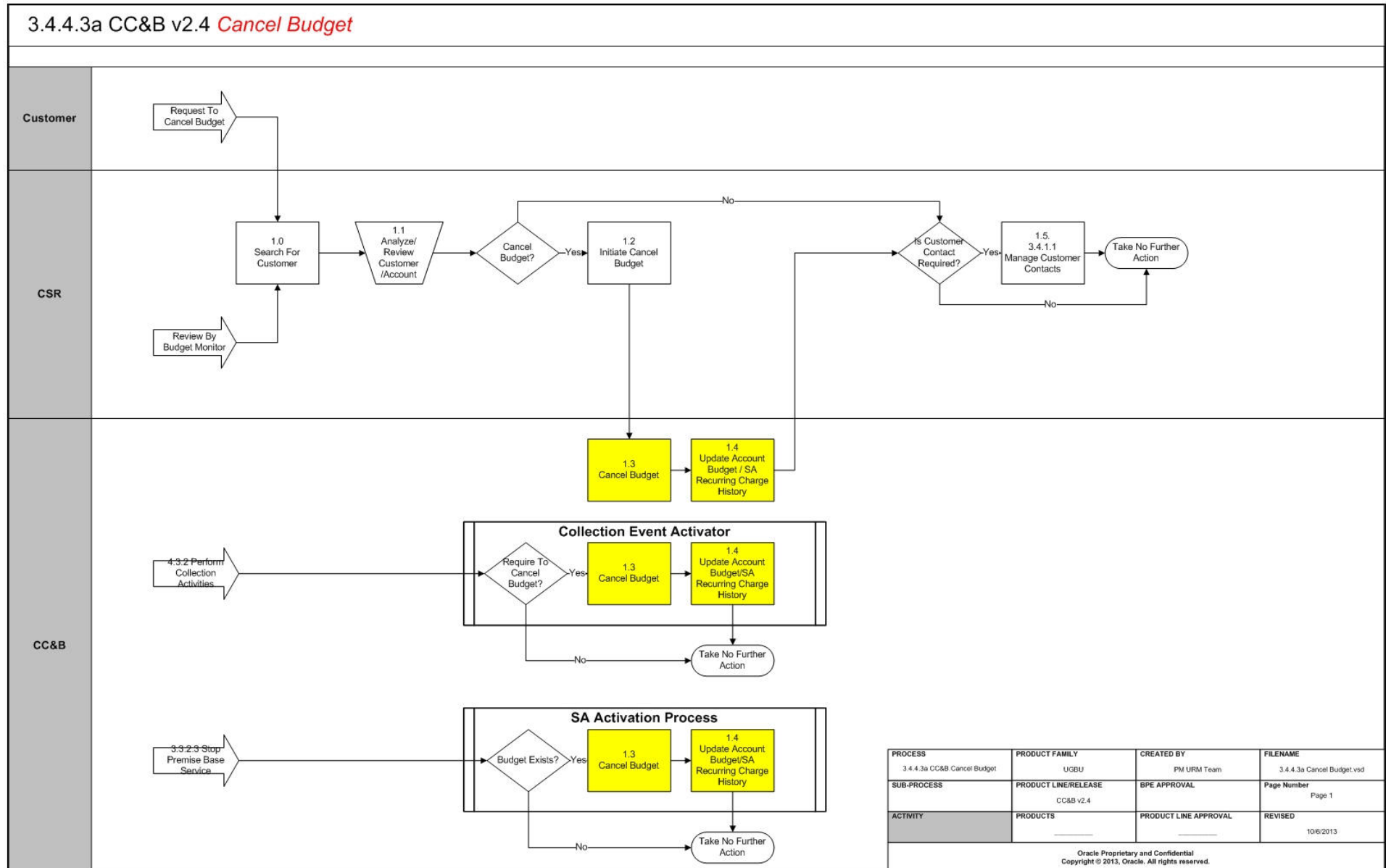
Actors/Roles

The Cancel 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

Cancel Budget Process Model - Page 1



Cancel Budget Detailed Process Model Description

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

- ♦ [1.0 Search for Customer](#)
- ♦ [1.1 Analyze/Review Customer/Account](#)
- ♦ [1.2 Initiate Cancel Budget](#)
- ♦ [1.3 Cancel Budget](#)
- ♦ [1.4 Update Account Budget/SA Recurring Charge History](#)
- ♦ [1.5 Manage Customer Contacts](#)

1.0 Search for Customer

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

Actor/Role: CSR

Description: Upon receipt of request or inquiry about canceling the Budget Plan 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 Alert Algorithms](#)

1.1 Analyze/Review Customer/Account

Reference: [Cancel 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, Billing History, Credit Rating, and Credit and Collection History may be reviewed.

Available Algorithms

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

1.2 Initiate Cancel Budget

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

Actor/Role: CSR

Description: At Account level the CSR or Authorized User will cancel the Budget.

1.3 Cancel Budget

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

Actor/Role: CCB

Description: The Budget is canceled in CC&B. The system may cancel a Budget during a Collection Process (if the Collection Process contains a Cancel Budget Collection Event).

- **Manual Process:** The CSR or Authorized User will cancel the Budget upon request or based on other established business rules.
- **Automated Process:** If configured within Collection Process, the Collection Event Trigger will cancel a Budget.

Entities to Configure

- Collection Event Type
- Adjustment Type

Available Algorithms

- COLL COND Check if account is on a budget

Process Names

- **Collection Event:** The Collection Event Trigger – CET will activate a collection event to cancel the Budget.

1.4 Update Account Budget/SA Recurring Charge History

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

Actor/Role: CCB

Description: When the Budget is canceled, any recurring charge with an effective date beyond the cancellation date is deleted. A new recurring charge amount of “0” is added for each affected Service Agreement. Each Service Agreement’s Current Balance is synchronized with its payoff balance (using sync adjustment type defined on the Service Agreement’s SA type). When a Service Agreement is stopped the Budget is canceled. Refer to 3.3.2.2 Stop Service.

- **Manual Process:** When the CSR or Authorized User cancels the Budget, the Account’s Service Agreements Recurring Charge History, and Current Balance is updated.
- **Automated Process:** When a covered Service Agreement is stopped the Budget is canceled. Recurring Charge History and Current Balance is updated.

1.5 Manage Customer Contacts

Reference: [Cancel 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 Budget Plan for the Customer. Refer to 3.4.1.1 Manage Customer Contacts.

Installation Options - Control Central Alert Algorithms

The following installation options are available:

Algorithm Code	Algorithm Type	Description
C1-CCAL-CASE	CCAL-CASE	Highlight open cases
C1-CCAL-CLM	C1-CCAL-CLM	Highlight Open Rebate Claims
C1-CCAL-OCBG	C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
C1-OD-PROC	C1-OD-PROC	Highlight Active Overdue Processes
C1-OPN-MEVT	C1-OPN-MEVT	Highlight Open and Disputed Match Events
C1-PPBALERT	C1-STSKALSAC	Prepay Biller Task Alert
C1-STASKALRT	C1-STASKALRT	Retrieve Open Service Tasks
C1-STOP-SA	C1-STOP-SA	Highlight Stopped SAs
C1_CASH-DF	C1-CASH-ACCT	Cash Only Account
C1_COLL-DF	C1-COLLPR-AC	Highlight Active Collection Processes
C1_COLLRF-DF	C1-COLL-REF	Highlight Active Collection Agency Referral
C1_CRRT-DF	C1-CRRT-ACCT	Credit Rating Alert
C1_LSSL-DF	C1-LSSL-PER	Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF	C1-LSSL-PRM	Highlight Life Support/Sensitive Load on Premise
C1_PENDST-DF	C1-PEND-STRT	Highlight Pending Start Service Agreements
C1_SEVPR-DF	C1-SEVPR-ACT	Highlight Active Severance Processes
CI_CCAL-TD	CCAL-TD	Highlight open To Do entries
CI_CCAL_DECL	CCAL-DECL	Highlight effective declarations for acct and prem
CI_PPDENIAL	CC BY TYPCL	Count pay plan denial customer contacts
CI_PP_ACTIVE	PP BY STATUS	Show count of ACTIVE pay plans
CI_PP_BROKEN	PP BY STATUS	Show count of BROKEN pay plans
CI_PP_KEPT	PP BY STATUS	Show count of KEPT pay plans
CI_WO_BILL	C1-WO-BILL	Highlight Written Off Bills
F1-SYNRQALRT	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