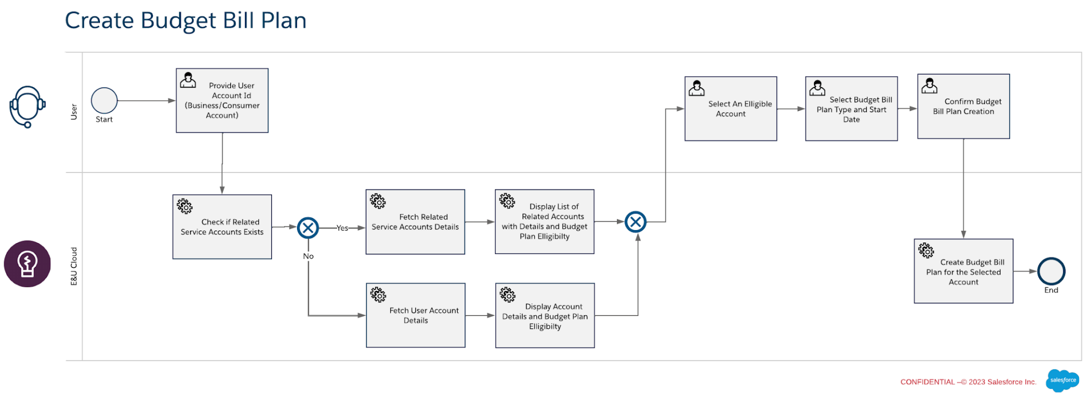
Create Budget Billing Plan

A process to create a budget bill plan enrollment.



Overview

The Create Budget Bill Plan process guides a front office user through the steps to set up a budget bill plan.

The front office user will start the process flow by selecting the Create Budget Bill Plan Action on the Agent Console after the interaction has started and the Account identified.

The front office user will be taken to the process flow which will provide a list of the Service Accounts associated with the Customer Account. Budget Bill Plans will be created at the Service Account so the user must select a Service Account to continue to the next step. If the Customer Account includes the field "Status" and no Account with the type of Service Account exists, the Customer Account should be treated as the Service Account.

A budget bill plan can only be created for service accounts that meet the basic requirements. If the service account does not meet the requirements listed below, the user will not be able to select the service account and they should be able to see the reason. The eligibility logic and error messages should be configurable and have the option to add more requirements or remove all logic.

Service Accounts are not eligible for a Budget Bill Plan if the following criteria apply

- Service Account has an active Budget Bill Plan
- Service Account has an unpaid Statement
- Service Account has a status that is anything other than Active

The user will enter basic Budget Bill request information including Budget Bill Plan Type and Budget Bill Start Date. These fields will be stored on the Service Account when the Budget Bill plan is saved. The Budget Bill Plan Type field is a picklist that can be configured by each client to represent the types of budget plans available.

The budget bill plan confirmation screen will display the information entered on the request screen with the Budget Bill Plan Amount and Budget Bill Plan True Up Schedule. The Amount and True Up Schedule fields will be stored on the Service Account when the Budget Bill Plan is saved.

The Budget Bill Plan Amount is calculated but clients will have the option to replace the calculated amount with the amount retrieved from an external system.

Budget Bill Plan True Up Schedule is defaulted to “Annual” but can be replaced with a value retrieved from an external system.

The user will confirm the Budget Bill Plan details and complete the interaction by closing the case.

Use Case Scenario

A customer requests a budget bill plan. The front office user who receives the call starts the interaction and selects the Create Budget Bill Plan action. The front office user is guided through the budget bill plan creation process. The front office user selects the service account and budget bill plan details and the budget bill plan amount is automatically calculated. The budget bill plan is saved.

Assumptions

1. Budget Bill Plan Amount calculation is done by calculating the average of the Statements associated with the account – up to the last 12 months.
    - If there are more than 12 months of statements then only the last 12 months average is shown.
    - If there are less than 12 months of statements average of all available statements is shown.
    - If no statements are available then default amount $100 is shown
2. The budget bill plan details will be updated on the service account when the budget bill plan is saved.
3. Integration to a back-end system to calculate the budget bill amount and process the budget bill plan when it is saved can be added to the process by clients.