

Lesson 13 Using Trouble Tickets to Resolve Issues

13.1 Prerequisites

For this exercise, use:

- In a supported browser go to the BillingCenter URL
 - Username: **studentXX**
 - Password: **gw**
 -

13.2 Exercise: Use a Trouble Ticket to put a hold on a Delinquency.



Activity

This exercise simulates a new renewal situation. Assume that the PAS has sent BillingCenter a new renewal billing request for a Homeowners policy. The policyholder has requested an additional week for deciding whether to accept the renewal offer. Ultimately she decides not to take the renewal she was offered.

1. Add a policy to the Suki Freeman XX account with the following details:

- Policy #: HO01-SFREEMAN-XX
 - Product: Homeowners
 - Payment Plan: **PP12**
 - Charge: Premium \$1234
- a) What delinquency plan is associated with the Suki Freeman account?
 - b) What delinquency reasons are specified in the delinquency plan?

2. WAIT: The Instructor will make the first invoice billed.

Assume the policy is actually a renewal offer. Suki has received her first bill for the renewal. She contacts Succeed Insurance and asks for an additional week to decide whether to renew the policy.

3. Create a trouble ticket for the HO01-SFREEMAN-XX policy (not the account):

- Type: Customer Question
- Subject: Extending renewal offer

- Details: Customer has requested a 1-week extension.
- Priority: Normal
- Due Date: <1 week after the **Due Date** of the first invoice >
- Escalation Date: <same as above>
- Copy the Due Date so you can use it in a later step.

4. Suspend automatic processing for delinquencies

- a) Paste the date you copied in step 1 as the **Release Date**. This means the delinquency hold **Release Date** is the same as the **Due Date** and **Escalation Date** of the trouble ticket.
- b) Assign the trouble ticket to yourself.

5. Open the new trouble ticket and confirm that the delinquency hold has been placed and has the correct release date.

6. Look at the trouble ticket alerts:

- a) Go to the **Policy Summary**. Why are two trouble ticket alerts displayed?
- b) Go to the **Account Summary** to confirm the trouble ticket alert is displayed.
- c) Indicate to the instructor that you are ready to continue (**13,1,06**)

7. WAIT: The instructor will make the policy past due.

8. On the Account Invoices screen:

- a) What is the **Status** of the invoice?
- b) Has a delinquency occurred? Why or why not?
- c) Indicate to the instructor that you are ready to continue (**13,1,08**)

Assume the deadline for the renewal has passed and Succeed Insurance has not received a payment for the renewal. This means that the policyholder has decided not to renew the policy.

9. WAIT: The instructor will:

- a) Advance the clock to the **Escalation Date** of the trouble ticket.
- b) Run the Trouble Ticket Escalation batch process.

10. Open the trouble ticket.

- a) What indication of the escalation appears on the **Trouble Tickets** screen?
- b) Indicate to the instructor that you are ready to continue (**13,1,10**)

11. WAIT: The instructor will run the Release Trouble Ticket Hold Types batch process.

12. Go to the Delinquencies screen.

- a) What type of delinquency has occurred?
- b) What is its status?
- c) What events were executed?

13. On the Policy Summary screen:

- a) What is the Cancellation Status?
- b) Why isn't the policy cancelled?

14. Click the trouble ticket alert on the Account Summary screen. Close the trouble ticket.

13.3 Solution



Solution

1. Add a policy to the Suki Freeman XX account with the following details:

- Policy #: HO01-SFREEMAN-XX
 - Product: Homeowners
 - Payment Plan: **PP12**
 - Charge: Premium \$1234
- c) What delinquency plan is associated with the Suki Freeman account? **DP02**
 - d) What delinquency reasons are specified in the delinquency plan? *Past Due, Not Taken*

2. WAIT: The Instructor will make the first invoice billed.

Assume the policy is really a renewal offer. Suki has received her first bill for the renewal. She contacts Succeed Insurance and asks for an additional week to decide whether to renew the policy.

3. Create a trouble ticket for the HO01-SFREEMAN-XX policy (not the account):

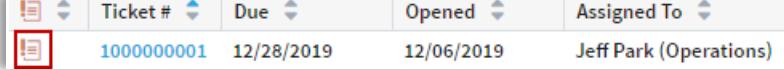
- Type: Customer Question
- Subject: Extending renewal offer
- Details: Customer has requested a 1-week extension.
- Priority: Normal
- Due Date: <1 week after the **Due Date** of the first invoice >
- Escalation Date: <same as above>
- Copy the Due Date so you can use it in a later step.

4. Suspend automatic processing for delinquencies

- a) Paste the date you copied in step 1 as the **Release Date**. This means the delinquency hold **Release Date** is the same as the **Due Date** and **Escalation Date** of the trouble ticket.
- b) Assign the trouble ticket to yourself.

5. Open the new trouble ticket and confirm that the delinquency hold has been placed and has the correct release date.
6. Look at the trouble ticket alerts:
 - a) Go to the **Policy Summary**. Why are two trouble ticket alerts displayed? *By default, a trouble ticket is associated with both a policy and a policy period.*
 - b) Go to the **Account Summary** to confirm the trouble ticket alert is displayed.
 - c) Indicate to the instructor that you are ready to continue (**13,1,06**)
7. **WAIT:** The instructor will make the policy past due.
8. On the **Account Invoices** screen:
 - a) What is the **Status** of the invoice? *Due*
 - b) Has a delinquency occurred? Why or why not? *No, because the trouble ticket placed a hold on automatic delinquency processing.*
 - c) Indicate to the instructor that you are ready to continue (**13,1,08**)

Assume the deadline for the renewal has passed and Succeed Insurance has not received a payment for the renewal. This means that the policyholder has decided not to renew the policy.

9. **WAIT:** The instructor will:
 - a) Advance the clock to the **Escalation Date** of the trouble ticket.
 - b) Run the Trouble Ticket Escalation batch process.
10. Open the trouble ticket.
 - a) What indication of the escalation appears on the **Trouble Tickets** screen? *An icon appears to the left of the trouble ticket number.*
 - b) Indicate to the instructor that you are ready to continue (**13,1,10**)
11. **WAIT:** The instructor will run the **Release Trouble Ticket Hold Types** batch process.
See appendix for details
12. Go to the **Delinquencies** screen.
 - a) What type of delinquency has occurred? *Not Taken*
 - b) What is its status? *Closed*
 - c) What events were executed? *Send Notice of Intent to Cancel*
13. On the **Policy Summary** screen:
 - a) What is the Cancellation Status? *Pending Cancellation*

- b) Why isn't the policy cancelled? As *the system of record*, the PAS must cancel the policy before it is cancelled in BillingCenter.