# 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

- o   Details: Customer has requested a 1-week extension.
- o   Priority: Normal
- o   Due Date: <1 week after the **Due Date** of the first invoice >
- o   Escalation Date: <same as above>
- o   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 <u>XX</u> account with the following details:**

    - Policy #: HO01-SFREEMAN-<u>XX</u>
    - 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. <u>**WAIT**</u>**: 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-<u>XX</u> policy (not the account):**

    o Type: Customer Question

    o Subject: Extending renewal offer

    o Details: Customer has requested a 1-week extension.

    o Priority: Normal

    o Due Date: <1 week after the **Due Date** of the first invoice >

    o Escalation Date: <same as above>

    o 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.  <u>**WAIT**</u>**: 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.  <u>**WAIT**</u>**: 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.*

| ▤ ⇕ | Ticket # ⇕ | Due ⇕ | Opened ⇕ | Assigned To ⇕ |
|---|---|---|---|---|
| ▤ | 1000000001 | 12/28/2019 | 12/06/2019 | Jeff Park (Operations) |

    b)  Indicate to the instructor that you are ready to continue (**13,1,10**)

11. <u>**WAIT**</u>**: 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.*