

Billing

Academy Pack

Name



DOCUMENT CONTROL

i. Version History

This table records the status and version history of this deliverable.

Version	Date	Author	Version History
V0.1	2 October 2015	Sarah Lewis	Creation of Document
V1.0	7 October 2015	Sarah Lewis	Signed off

ii. Reviewers

This table records the reviewers responsible for recommending authorisation of this deliverable.

Version	Name	Role	Response
V1	Gill Gittins	Operations Manager	Approved
V1	Lee Moreton	Team Manager	Approved

iii. Consultees

This table records subject matter experts consulted about this deliverable.

Version	Name	Role	Response
V0.1	Sarah Rock	Operations Manager	
V0.1	Gill Gittins	Operations Manager	
V0.1	Dawn Hyde	Senior Back Office Manager	

iv. Informed

This table records the distribution list for the completed deliverable.

Version	Name	Name	Name

INTRODUCTION

This academy pack has been designed to help you see the The Advisor Lifecycle within Extra Energy, it starts with Induction Training and helps you through your first few weeks through probation and then for development thereafter.

Description of Competance	Date Witnessed	Witnessed by
Induction Training Week One		
Creation of a bill using the invoicing tool		
Recognize when a rebill is required as the previous bill is incorrect		
Investigate why there has been No Bill		
Explain what an Initial bill for a domestic customer is and what differences this bill has to a cyclic or final bill.		
Explain what a Cyclic bill for a domestic customer is, and what may have changed on this bill		
Explain what a Final bill for a domestic customer is and what differences this bill has to a cyclic or initial bill.		
Recognising the need to raise a disputed reading		
Identifying an Erroneous Transfer on an account when checking a bill		
Asking appropriate questions of the customer		
Calculating expected use against actual use		
Why is the bill to high		
Why is the bill to low		
Average KWH use over period (use of seasonality)		
Look at metering information is it correct		
When to question an actual reading		
Complete the steps in Account + to action a Change of Tenancy		
When processing a final bill manually explain what has to be on the account before it can be processed		
Raise a handoff to another department for another process to take place		
Recognise where a Meter Exchange has taken place and validate the bill		
Full adherence to Data Protection		
Explain when and why you would raise a complaint on a customer's account and demonstrate the steps in Account + to show this		
Can navigate PFV when needing to look at native flows such as D149 / D150		
Can recognize when an account is transferring away from us		
Explain why a customer's bill may not have been issued when there are exceptions in the registration journey		
Explain why a customers DD has increased		
Recognise when a potential disputed reading is within tolerance and therefore should not be raised		
Demonstrate how to raise an account fix		
Demonstrate where to locate the Meter Reading Schedule date within Account + and explain how this affects when a customer is billed		

Explain how an estimated reading can affect a customers direct debit		
Confidently answer customer queries via the telephone		
Identify Transposed Readings		
Identify when reads have been inputted wrong from the customer		
Explain how an estimate is produced by the system using a D19		
Why estimate has been produced with no advance		
Why there be no advance between reads for gas		
Why there be no advance between reads for electricity		
Billing around the clock		
Identify the correct no. of dials based on master data and customer data.		

ABSENCE LOG

Date	Reason

LATENESS LOG

Date	Reason

COACHING LOG

Date	Coaching Subject	Learner Comments	Coach Comments

TRAINING LOG

Date	Training Subject	Learner Comments	Trainer Comments