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CSR 1

MODULE

Chapter One: Overview

What to Expect in Part 1 & 2

Welcome to our CSR, Customer Service Representative, training for the Hillsborough County Water Resources Department, part of the Public Utilities Department Enterprise Solutions Division, underneath the BOCC, or Board of County Commissioners.

We are excited you have chosen to join our team!

This training will be divided into two parts to ease the learning process. In part one, or CSR One, you will learn the basics of the CSR role and one of the most important procedures, starts and stops. With this will come the training on how to use CCS, (Customer Cloud Service) the system we use to hold and manage our customers information.

Meanwhile in CSR Two, you will learn the various situations and circumstances that customers will call into the contact center for. From bill questions to concerns regarding water usage, Part Two of the training will prepare you for what is to come your way.

Overall, be prepared for a lot of information to start flowing your way. While it is a lot, there are years and years of experience in our call center with friendly people to match. Any and **all** questions are valid and encouraged! You never know if your question might be helping someone else along the way, or even bringing things to our attention that have been overlooked.

All of that being said, let's get started with the CSR Training part one!

(Go ahead and take a learning style quiz at: <https://learningstylequiz.com/>)

Who Are Our Customers?

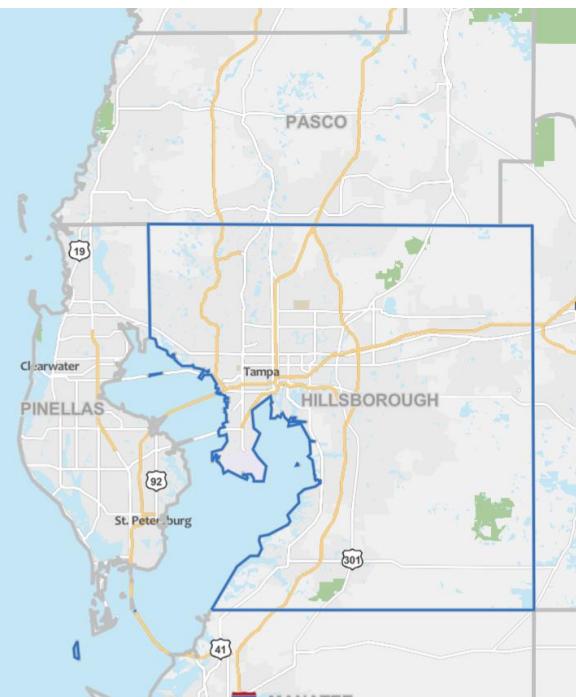
In our Hillsborough County Water Department network, we have over 200,000+ customers and that number continues to grow on daily basis. Within that 200,000+ customer base, we have customers of all ages, backgrounds, incomes, abilities, and locations. Our customers receive water in homes, apartments, mobile homes, and townhouses in various areas throughout our county. You might even get the occasional call from a customer of ours who is stationed in Germany or temporarily living in Africa, but still our customers, nonetheless. And although we might not service the whole county, we still aim to serve and assist our residents to guide them to receive water no matter their address.

County

Hillsborough County, Florida

Hillsborough County, Florida has 1,022.5 square miles of land area and is the 13th largest county in Florida by total area. Hillsborough County, Florida is bordered by Pasco County, Florida, Pinellas County, Florida, Manatee County, Florida, Hardee County, Florida, and Polk County, Florida....[Read More](#)

[Share Profile](#)



// United States / Florida / Hillsborough County, Florida

Display Sources



What Makes Someone a Customer?

Though this may seem like a redundant question, there are certain things that qualify someone as a Hillsborough County Water customer. As mentioned on the previous page, we don't service the entire county because it is broken up into sections serviced by different water companies. So first and foremost, ensuring they are our customer by the address, but following that, going through the necessary security procedures to ensure you are speaking to the correct, *authorized* person.

To do so, you will need to verify these things with whoever you are speaking to:

- Full name (ask them to provide their name, don't say it for them)
- Last 4 of the social (they will share this)
- Phone number (CSR confirms this)
- Email (CSR confirms this)
- Address (CSR confirms this)

Verifying these things also assists in speeding up the process because if the customers number or email had changed, you are able to change it at that time, rather than after everything had been settled as far as the concern they called about. This also eliminates the chance for the customer to say they haven't been receiving any correspondence as now they are on a recorded line confirming that contact information is correct.

Sunshine Law and Red Flag Rule

Sunshine Law: Florida's Government in the Sunshine Law, commonly called the Sunshine Law, passed in 1967. It requires that all meetings of any state, county, or municipal board or commission in Florida be open to the public and declares that actions taken at closed meetings are not binding. These laws aim to promote transparency and accountability in government operations, and to ensure that the actions and decisions of public officials are conducted openly and are accessible to the public they serve. **Additionally, they may require that government records and documents be available for public inspection and copying, with certain exemptions for sensitive information like personal privacy or national security.**

Red Flag Rule: The "Red Flag Rule" refers to a specific law aimed at combating identity theft. It requires certain businesses and organizations to implement identity theft prevention programs designed to detect, prevent, and mitigate identity theft in their day-to-day operations.

Access Programs on Startup

When you get to your desk in the morning, it will make your day much smoother if you open all the needed programs. Those programs are:

1. Teams (Chat)
2. Outlook (Email)
3. One Note (CSR Information)
4. Cisco (Call Recorder)
5. Jabber (Phone Service)
6. CCS (Customer Information)
7. OnBase (Bill Viewer)
8. IWR Admin (Online Password/Email Reset)
9. IWR \Waterbill (Customers Bill Pay Site)
10. Neptune (Smart Meter Information)
11. Excel (Daily Tracking Sheet) (only training)
12. USPS (For Official Addresses)

Websites to save for quick access on your bookmark bar:

1. COIN (County Online Information Network)
2. Oracle (Clock-in/Clock-out)
3. Property Appraiser (To Determine Home Ownership)
4. Tampa.gov (Service Areas)

Telephone Etiquette

Greet callers warmly: Begin each call with a friendly greeting, and tone while saying: "Thank you for calling the Hillsborough County Water Resources Department. My name is _____ and we are on a recorded line. How may I help you today?" (may vary depending on who is answering)

Use a professional tone: Maintain a professional and courteous tone throughout the call, even if the customer is upset or frustrated.

Active listening: Listen attentively to the customer's concerns without interrupting. Let them fully explain their issue before responding.

Empathize and show understanding: Demonstrate empathy by acknowledging the customer's feelings and showing understanding of their situation.

Speak clearly and slowly: Enunciate your words clearly and avoid speaking too quickly. This helps ensure that the customer can understand you easily.

Use positive language: Use positive language and avoid using negative phrases or blaming language. For example, say "I'll be happy to assist you with that" instead of "I can't help you with that."

Be concise: Provide clear and concise responses to customer inquiries. Avoid using unnecessary jargon or technical terms that the customer may not understand.

Confirm understanding: After providing information or assistance, confirm that the customer understands and ask if they have any further questions.

Be patient and remain calm: Stay patient and calm, even if the customer is upset or angry. Avoid becoming defensive or argumentative.

End the call politely: Thank the customer for calling and offer assistance with any further questions or concerns. End the call on a positive note.

Follow company protocols: Adhere to company policies and procedures, including call handling protocols and security measures.

Take notes: Keep detailed notes of the call, including the customer's issue, any solutions provided, and any follow-up actions required.

- **Clear and Concise Communication:** Communicate information clearly and succinctly, avoiding technical jargon or complicated language. Use simple and easy-to-understand terms to ensure customers comprehend the information provided.
- **Empathy:** Show empathy towards customers by acknowledging their emotions and concerns. Use phrases like "I understand how frustrating that must be" or "I'm sorry you're experiencing this issue" to convey empathy and build rapport.
- **Positive Language:** Use positive and friendly language to create a positive customer experience. Maintain a cheerful and professional tone throughout the interaction, even when dealing with challenging situations.
- **Confidence and Assertiveness:** Speak confidently and assertively to reassure customers and instill confidence in your ability to assist them. Avoid sounding uncertain or hesitant, as this may undermine credibility.
- Additionally, if there is information that you need (phone number, social, email, etc.) say that you need it, not "may I have...?".

Don't--> Ex: Thank you for providing your phone number, may I have your social?

Do--> Ex: Thank you for providing your phone number, next I will need your social.

- **Problem-Solving Skills:** Demonstrate strong problem-solving skills by actively seeking solutions to customers' issues. Be resourceful and creative in finding resolutions and offer alternatives or workarounds when necessary.
- **Effective Questioning:** Ask relevant and probing questions to gather necessary information and understand the customer's needs fully. Use open-ended questions to encourage customers to elaborate on their concerns.
- **Professionalism:** Always maintain professionalism, adhering to company policies, procedures, and standards of conduct. Avoid engaging in unprofessional behavior or using inappropriate language.
- **Time Management:** Manage call time effectively by balancing thoroughness and efficiency. Strive to resolve customer inquiries within a reasonable timeframe while ensuring that all their concerns are addressed satisfactorily.
- **Adaptability:** Adapt communication style and approach based on the individual needs and preferences of each customer. Be flexible in responding to diverse situations and customer personalities.
- **Resilience:** Remain calm and composed, even in high-pressure or challenging situations. Develop resilience to handle difficult customers or complex issues without becoming overwhelmed or agitated.
- **Follow-Up and Closure:** Provide clear and concise summaries of the resolutions or next steps agreed upon during the call. Offer assistance with any additional questions or concerns, and ensure that the customer feels satisfied before ending the interaction.

Chapter Two: Need to Know

Ways Customers Request Service

With Hillsborough County Water Department, customers have two ways they can request service:

1. Calling into the Call Center
2. Requesting Services Online

The screenshot shows a web page titled "Request to Start, Stop, or Move Water Service". At the top, there's a navigation bar with links for Residents, Businesses, Government, Departments, I Want To..., and About Hillsborough County. Below the title, there's a breadcrumb trail: Home / Residents / Property Owners & Renters / Water & Sewer / Request to Start, Stop, or Move Water Service. A large orange button on the right says "Request". On the left, there's a section about fees and another about things to consider. On the right, there's a sidebar with related pages like "Apply to Adopt-A-Pond", "Backflow & Cross Connection Service Testing", etc.

Customers are advised on this page that if services are needed in the next two business days, it is better to call. These online requests are worked in between call center calls. If the call center is busy, these don't have time to be worked, therefore all customers are advised to call in when they have an issue.

Forms of ID

When setting up a new account, there are a few different forms of ID a customer can provide other than a social security number. They can provide a foreign ID, a passport, or a drivers license.

ADDING FOREIGN ID

For customers with foreign ID that do not have a social security number:

- If the customer doesn't have a social security #, then a deposit is required for all other ID forms.
- Ask for available ID.
- Create the Person record and select 'Foreign ID#' from the **ID Type** drop down.

ADDING FOREIGN ID for IWR USAGE

In order to access their account information via the IWR, customers with foreign ID that do not have a social security number need to be set-up as follows:

- Ask for available ID.
- Create the Person record and select 'Foreign ID#' from the ID Type drop down.
- Place the foreign ID in the ID # field.
- Also add a Social Security # line by using five zeroes followed by the last four digits from the person's Foreign ID (example 000-00-xxxx).
- If the customer's Foreign ID does not end with numbers; ask them to provide a four-digit password.
- The IWR does not recognize foreign IDs. The customer will be able to access their account via the IWR with the four digits provided.

ADDING PASSPORT

Add a line for ss# and use the last four of the passport IDs as the last four of ss#. See the example below.

Person

Bookmark Clear Save Refresh

Main Correspondence Info Characteristics Persons Person Portal

PERSON/BUSINESS Person LIFE SUPPORT / SENSITIVE LOAD None LIFE SUPPORT / SENSITIVE LOAD NOTES

	NAME TYPE	PERSON NAME	DO NOT FORMAT
+	Primary	DOE,KATE	<input type="checkbox"/>

PERSON NAMES

	CONTACT ROUTING	PERSON CONTACT TYPE	CONTACT INFORMATION	EXTENSION	FORMAT
+	Phone	Cell Phone	(812) 123-4567	<input type="text"/>	(999) 999-9999
+	Email	Primary Email	kate@aol.com	<input type="text"/>	

PERSON CONTACTS

	PRIMARY ID	ID TYPE	ID NUMBER	IDENTIFIER FORMAT
+	<input checked="" type="checkbox"/>	Social security number	000-00-1188	999-99-9999
+	<input type="checkbox"/>	Passport ID	5671231188	

PERSON IDS

ADDING DRIVER LICENSE

If the customer refuses to provide social security, we can use the customer's driver's license **BUT THEY MUST DO SO IN PERSON AT THE BSOC OFFICE.** Add a line for ss# and use the last four of the driver's licenses as the last four of ss#. See the example below.

Person

Main Correspondence Info Characteristics Persons Person Portal

PERSON/BUSINESS Person None LIFE SUPPORT / SENSITIVE LOAD Notes

PERSON NAMES	Name Type	Person Name	Do Not Format		
	+	<input checked="" type="button"/> Primary	DOE,KATE	<input type="checkbox"/>	
PERSON CONTACTS	Contact Routing	Person Contact Type	Contact Information	Extension	Format
	+	Phone	* Cell Phone	(812) 123-4567	<input type="text"/>
PERSON IDS	Email	* Primary Email	kate@aol.com	<input type="text"/>	<input type="text"/>
	+	<input checked="" type="checkbox"/>	Social security number	000-00-5601	999-99-9999
+	<input type="checkbox"/>	Passport ID	D100-88-560-1		

Ways to Make a Payment

Hillsborough County customers are offered more than one way to make their bill payments every month. Please find those methods below:

- Online via govone.com/waterbill (IWR)
- Over the phone with the automated payment line (IVR)
- At any Amscot (after deposit, \$2 fee, delayed upload)
- At any of the kiosk locations around the county
 - **Jimmie B. Keel Regional Library**
2902 W Bearss Ave, Tampa, FL 33618
Outside with 24-hour access
 - **South Shore Regional Library**
15816 Beth Shields Way, Ruskin, FL 33573
Outside with 24-hour access
 - **Frederick B. Karl County Center**
601 E Kennedy Blvd, Tampa, FL 33602
Inside the building during business hours of 8am to 5pm
- At the BSOC Building
332 N Falkenburg Rd, Tampa, FL 33619
(Inside the lobby during business hours of 8am to 5pm. Drive thru with 24-hour access)
- P.O. Box with Stub: P.O. BOX 30702 Tampa, FL 33694
- P.O. Box without Stub: P.O. BOX 89637 Tampa, FL 33689

How to Read a Water Bill



CUSTOMER NAME
BILL SAMPLE

A

ACCOUNT NUMBER

BILL DATE

DUUE DATE

04/21/2021 05/12/2021

B



Hillsborough
County Florida

Service Address: ANY CITY

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METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION	READ TYPE	METER DESCRIPTION
41913337	03/17/2021	6882	04/15/2021	6949	6700 GAL	ACTUAL	WATER
35115689	03/17/2021	26779	04/15/2021	26961	18200 GAL	ACTUAL	RECLAIM

Service Address Charges

Customer Service Charge \$4.69
Purchase Water Pass-Thru \$20.23
Water Base Charge \$9.76
Water Usage Charge \$7.77
Sewer Base Charge \$15.77
Sewer Usage Charge \$34.04
Reclaimed Water Charge \$13.00
Total Service Address Charges \$105.26

C

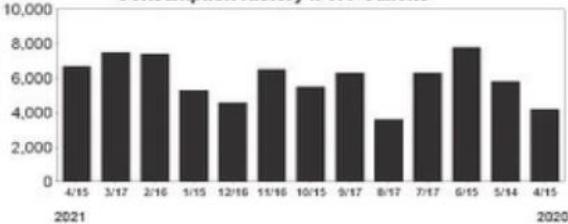
Summary of Account Charges

Previous Balance	\$125.93
Net Payments - Thank You	-\$125.93
Total Account Charges	\$105.26
AMOUNT DUE	D \$105.26

Important Message

Do you know your allowed irrigation days and hours? Recent ordinance changes have impacted schedules for some customers. Check yours by using the address lookup tool at HCFLGov.net/WaterRestrictions or call (813) 275-7094 for a recorded summary.

Consumption History x 100 Gallons



E



Make checks payable to: BOCC

ACCOUNT NUMBER:

Hillsborough
County Florida

ELECTRONIC PAYMENTS BY CHECK OR

Automated Payment Line: (813) 276-8526
Internet Payments: HCFLGov.net/WaterBill
Additional Information: HCFLGov.net/Water



THANK YOU!



BILL SAMPLE
BILL SAMPLE
BILL SAMPLE BILL SAMPLE BILL SAMPLE

18

DUE DATE	05/12/2021
AMOUNT DUE	\$105.26
AMOUNT PAID	



0000257959155

00000105262

A - This is the Hillsborough County utility account number. Customers sending a payment online without the remittance slip will need to indicate this account number when processing their payment.

B - The due date is the date that the bill is due on, or before.

C - This section breaks down and totals all the service address charges and miscellaneous charges outlined in the utility bill.

D - This is the total amount due, including past due charges from previous billing cycles, recent payments, and adjustments.

E - This easy-to-read graph provides 13 months of usage history. This information is helpful for conservation purposes, and in alerting the customer to possible changes in usage.

F – The customer will find a detachable remittance slip located at the bottom of your utility bill. They will detach and return it with their payment.

G - Be sure to check the reverse side of the bill for payment types, payment options, and other relevant information.

Service address charges definitions:

- **Customer Service Charge** - covers routine customer services like meter reading, account maintenance, and billing.
- **Purchase Water Pass-Thru** - charged based on the cost of water purchased by the County from regional supplies.
- **Water Base Charge** - covers cost of providing water like personnel and operating, that are not related to the amount of water produced or treated.
- **Water Consumption Charge** - cost of producing and treating water, billed per 1,000 gallons of metered water flow.
- **Sewer Base Charge** - covers costs for providing wastewater like personnel and operating, that are not related to the amount of wastewater treated and disposed.
- **Sewer Usage Charge** - cost of treating and disposing of wastewater, billed per 1,000 gallons of metered flow.

Fees and Rates

SPECIAL SERVICE CHARGES

Read/turn-on for establishing or transfer of account	\$25
Delinquent collection fee Each attempt to collect	\$10
Interrupt service	
Water	\$25
Wastewater	Actual cost
Restore Service	
Water, next working day	\$25
Same day (at customer request)	\$35
Wastewater, next working day	\$30
Emergency turn off/on	\$35
Verify illegal consumption	\$25+ usage
Re-install meter	
5/8 inch through 1 inch	\$50
Larger than 1 inch	Actual cost
Return check/ACH service charge for amount of checks from:	
\$0 - \$50	\$25
\$50.01 - \$300	\$30
\$300.01 - \$800	\$40
\$800.01 - larger	5% of face value
Document recording costs	Actual cost
Documentary stamps	Actual cost
Re-read meter due to obstruction	\$20
Re-read by customer request	\$25
Water bench test – 5/8 inch meter	\$40
Larger than 5/8 inch meter	Actual cost
Bench test meter (customer request)	
5/8 inch - 1 inch	\$40
larger than 1 inch	Actual cost
Special handling/delinquent and final customer agreements	\$30
Missing/cut locks	\$25
Missing/cut locking device	\$25
Missing meter fee	Pre-tap fee + est. usage
Missing hydrant meter	\$620 + est. usage
Unauthorized connection	\$200 + est. usage

PAYMENT MUST BE MADE IN OFFICE PRIOR TO TURN-ON.

After-hours service charges increase to actual cost for available services between 5 p.m. and 8 a.m. on weekdays and for all hours on holidays and weekends.

DEPOSITS

In order to establish service, a security deposit and connection fee are required at time of application. Deposit amounts vary by customer class and type of service. Failure to promptly pay monthly bills may result in a deposit increase up to three times the average monthly bill.

DEPOSIT WAIVERS

Residential – The County may consider a customer's credit report score, in lieu of a cash deposit by contacting customer service (813) 307-1000.

Commercial – The County will accept a Surety Bond or a Letter of Credit in lieu of a cash deposit.

DEPOSIT REFUNDS

Single-family residential customers who have established two years of service and have paid bills consecutively on time within the last 12 months may request their deposit be credited to their account. Deposits are applied to final bills when services are terminated or transferred to a new account.

DISHONORED PAYMENTS

Payments not honored by the bank must be collected immediately, or your service will be interrupted. Customers with dishonored payments are required to make future utility payments with cash, money order, certified check, or credit card.

SET UP NEW SERVICE

To set up new service, customers must provide a Social Security number or visit one of our customer service centers to provide proof of identification.

PAYMENT OPTIONS

Make checks payable to:
Board of County Commissioners (BOCC)

WEB PAYMENTS:
HCFLGov.net/WaterBill
(Visa, Mastercard, American Express, or Discover)
or by check.

PHONE PAYMENTS: To pay by phone using (Visa, Mastercard, American Express, or Discover), dial (813) 276-8526.

E-CHECK (ONLINE BANKING): Contact your financial institution to initiate this process.

RECURRING PAYMENTS: Visit HCFLGov.net/WaterBill to apply for automatic monthly withdrawals from your checking or savings account.

MAILING PAYMENTS: Please do not mail delinquent payments or cash. Public Utilities Department
P.O. Box 89637
Tampa, FL 33689-0410

DROP BOX LOCATIONS: No cash please.
All day Monday-Sunday.

- 332 N. Falkenburg Road, Tampa
- Florida West Coast Credit Union
601 E. Kennedy Blvd., County Center Lobby
Monday - Friday 9 a.m. to 5 p.m.

PAY YOUR BILL AT OUR BRANCH OFFICE:
Monday-Friday, 8 a.m. to 5 p.m.

- 332 N. Falkenburg Road, Tampa

PAY YOUR BILL AT AMSCOT: Hillsborough County Public Utilities' customers can now pay their current water/wastewater bills at all Florida AMSCOT locations.

UTILITY INFORMATION LINE (24/7)

(813) 307-1000

Website: HCFLGov.net/water

Water Bill Calculator: Visit HCFLGov.net/Water and click on "Water Bill Calculator"

Florida Relay Service: (800) 955-8770

Email Address: WaterDept@HCFLGov.net

FAX Number: (813) 635-7387



Hillsborough
County Florida

HCFLGov.net

Deposits

In order to establish service, a security deposit is required at time of application. Deposit amounts vary by customer class and type of service.

Residential deposit amounts: (debit or credit card payments, or cash at BSOC)



- Residential Water Deposit - **\$90 (Water only)**
- Residential Waste Water Deposit - **\$165 (Sewer only)**
- Residential Water/Waste Water Deposit - **\$185 (Water and Sewer)**

Deposit options:

New customer can pay set up and deposit to avoid credit check

- Provide website and account number
- Advise they will need to register online to process payment

New customer can request to run a credit check

- If approved only \$25 set up fee will be required, but billed on first bill.
- If denied, full amount deposit and set up fee will be required and have to be paid today. (Advise they will need to register online to process payment)

No social security number

- If new customer doesn't provide their social security number, they are automatic a deposit customer.

Credit Checks

For all water services a deposit is required for every customer. The only exception is if the customer has never had a credit check with us, they qualify for a **one-time** credit check to waive the deposits.

New Customer

“The standard deposit at this location is \$____ plus a \$25 set up fee. However, we can run a 1 time, once per household credit check to possibly waive the deposit.”

1. “Thank you for holding. Your deposit has been waived and we will add the \$25 service fee to your 1st bill.”
or
2. “Thank you for holding. A deposit is required to start services today. Would you like to pay the amount with a debit or credit card?”

Previous or Existing Account / No Deposit

“Based on your previous account history, no deposit is required at this time and we’ll place the \$25 charge for your set up on your first bill.”

Previous Account or Existing Account / Deposit required

“Based on your previous account history, a deposit is required at this time. The standard deposit at this location is \$____.00 and the setup fee is \$25 bringing a total of \$____.00 due to start services. That amount would need to be paid by 5pm today to start services.
Would you like to proceed with starting the services?”

Credit Check

Premise 4103 YELLOWWOOD DR, VALRICO, FL, 33596, SFH (Sub MEADOWWOOD ESTATES)

SA Premise List

Premise Information

Premise Information 4103 YELLOWWOOD DR, VALRICO, FL, 33596, SFH (Sub MEADOWWOOD ESTATES) CIS Division HWRS Building Permit Issuance Date (YYYY-MM-DD) 1987-11-17 Certificate of Occupancy Date (YYYY-MM-DD) 1987-11-17 Service Area East Service Point Information 4103 YELLOWWOOD DR, VALRICO, FL, 33596 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 09, Durant Oaks / Active / 4088517 4088517 / Water Analog Meter / Effective Date/Time:10-17-2006 12:00:00AM EDT / Water Single Manual Register - Gallons - Scalar / 1 Measuring Component 05-13-2024 12:00:00AM (Cycle 09) - Expected Work Date: 05-14-2024

Stop Service

Favorite Links

- To Do + [1]
- Customer Contact + [2]
- Pay Plan + [3]
- Online Utility Exchange** [4] (arrow pointing here)
- IWR Website [5]
- Water Wastewater Provider [6]
- Property Appraiser Website [7]
- Watering Restrictions [8]
- Solid Waste [9]

CAMS

1

SSN Verification
RED FLAG ALERT
Match to Other Name AGNESZKA OBSZANSKI
ISSUED: 2007-2009
Deposit Decision
Waive Deposit

2

SSN Verification
RED FLAG ALERT
Match to Other Name CHRISTOPHER DEJESUS
ISSUED: 1989-1991
Deposit Decision
Deposit Required
AFFECTED BY NATURAL OR DECLARED DISASTER

Credit Check Pass Credit Check Fail

Click this link to pull up the credit check.

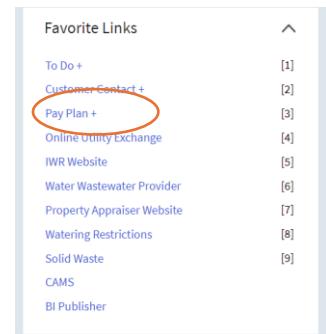
IMPORTANT: Customers are going to ask what kind of credit check we run and what the impact will be to their credit score. The only thing we are permitted to tell them is that it will appear as an inquiry. That's it. If they want to find out more about it, it is ran through Experian and they are welcome to contact them.

Contact Notes

Every single call that you take, no matter the size or situation, will require (shorthand) notes to be left on the account explaining what all happened during the call. Don't worry, there are endless examples you can copy from while you are learning the system! This is the procedure to ensure those are noted correctly:

1. Go to favorite links on the right side of the dashboard.
2. Enter the information for contact class, contact type, and comments.

The screenshot shows the 'Customer Contact' main screen. At the top, there are tabs for Main, Log, Characteristics, and Customer Contact Portal. Below the tabs is a search bar for 'CUSTOMER CONTACT ID'. The main area contains fields for OPEN, USER ID (JCROLL), PERSON ID (8702866275), ACCOUNT ID (9319122148), PREMISE ID (7862110907), PREFERRED CONTACT METHOD, CONTACT DATE/TIME (07-03-2022, 4:34:27PM), CONTACT CLASS (Customer service contacts), CONTACT TYPE (BILL-ACCT), and COMMENTS (PER AALEYA INQ BALANCE* ADV \$33.82 DUE BY 7/12/22* CUST INQ IF ACCOUNT IS ON AUTOPAY* ADV NO, BUT SHE CAN REGISTER ACCT ONLINE AND SET UP AUTOPAY). A red circle highlights the 'Characteristics' tab and the 'Comments' field.



3. Copy the Account ID for billing related or Premise ID for new service

- Click on the "Characteristics" tab
- Enter the ID in the space provided and save

The screenshot shows the 'Characteristics' screen. At the top, there are tabs for Main, Log, Characteristics, and Customer Contact Portal. Below the tabs is a search bar for 'CUSTOMER CONTACT ID'. The main area contains a table for CHARACTERISTIC TYPE and CHARACTERISTIC VALUE. The first row shows C1-ACCT and Account (9319122148). A red circle highlights the 'Characteristics' tab and the table row.

Contact Note Examples

NOTES ARE ALWAYS LEFT IN ALL CAPITAL LETTERS

MAKING PERSON ID WITHOUT STARTING ANY SERVICE

PER TAMIIKA REQ TURN ON @10730 MOSS ISLAND DR, RIVERVIEW, FL, 33569* ADV CUST OF PAST DUE
MUST SEND CLOSING DOC PROV CM EMAIL ADD

TRANSFER / MOVE SERVICE

CUST REQ MOVE SRV*T/OFF @ ON //*T/ON @ ON //*ADV \$25 S/U*DEP REQ

TURN ON WITH NO DEPOSIT

PER ASHUTOSH REQ TO TURN ON 6/13 @7617 WINGING WAY DR, TAMPA, FL, 33615* NO DEPOSIT PER
HISTORY* ADVISED OF \$25 SETUP FEE WILL BE BILLED TO THE ACCOUNT* UMA TO 4409 W LAMBRIGHT
ST, TAMPA, FL, 33614

TURN ON WITH DEPOSIT

PER MARK REQ TURN ON 3/12 @11401 NEWGATE CREST DR, RIVERVIEW, FL, 33579* \$185.00 DEPOSIT
PER CREDIT CHECK + \$25.00 SETUP FEE = \$210.00*

ADD T/ON WITHOUT DEPOSIT

PER STEVEN REQ ADDTL TURN ON 4/11 @1010 GIGGLESWICK LN, BRANDON, FL, 33511*\$25.00 SETUP
FEE DEP WAIVED PER HIST* CONF MAIL, EMAIL & PHONE

TURN OFF

PER ROBERTO REQ TO T/OFF 4/25 @4418 TIMBER TERRACE CIR* UMA TO 12613 N 56TH ST TEMPLE
TERRACE FL 33617-1221

TO DOs

ACCOUNT # 7742610000/TRANSFER DEPOSIT
SENT TRASNFER DEPOSIT TO DO # 41843049954838
PLEASE TRANSFER DEPOSIT FROM 13904 CHERRY DALE LN, TAMPA, FL, 33618, TO 1408 BRILLIANT CUT
WAY, VALRICO, FL, 33594

DEAD METER

PER JAMES REQ TO KNOW WHY THE LAST TWO BILLS SHOW A 0 USAGE* ADVISED HE MAY HAVE A DEAD
METER* SCHEDULED PI FOR 12/12* ADVISED CUST IF THE METER IS DEAD HE WOULD BE BACK BILLED
FOR ANY 0 USAGE MONTHS
LAST READ SHOWS "0" USAGE* HOUSE OCCUPIED* POSSIBLE DEAD METER

There are *endless* examples of these notes that CSRs can copy and paste while learning. This list will be shared.

Customer Follow Up

In CCS, this process allows users to create an electronic reminder on pending tasks by creating a To-Do for themselves. If a resolution cannot be provided when promised, a follow-up is to be given to let the customer know that we are still working towards the resolution. Or if it is solved, follow up with them and let them know the outcome.

- To-Do should be followed up promptly but shouldn't be done during high call volume times such as lunch or breaks.
- To-Do status: Green means the To-Do is current (days) old, Yellow means is past due (days) old, and Red means it is beyond past due (more than days) old.
- A To-Do should never get to a red status as this means we aren't keeping our customers up to date.

Set up new To-Do (Under related records add an alert)

- Under reminder drop-box select- send to the user

Customer Contact: BLACK,JUNG S, 16126 RAMBLING VINE DR E, TAMPA, FL, 33624, SFH (Su... Add Search Bookmark Refresh

Main Log

Customer Contact

Main

Information

BLACK,JUNG S, 16126 RAMBLING VINE DR E, TAMPA, FL, 33624, SFH (Sub NO/DALE F U1 VILAS NO/D) , Customer service contacts / Bill or Account Related, Contacted 10-10-2023

Contact Class

Customer service contacts

Contact Type

Bill or Account Related

User

Thomas - PROD, Yarmilla

Person

BLACK,JUNG S - Home Phone:(813) 285-7770

Account

BLACK,JUNG S, Residential, \$111.54

Premise

16126 RAMBLING VINE DR E, TAMPA, FL, 33624, SFH (Sub NO/DALE F U1 VILAS NO/D)

Preferred Contact Method

Comments

JUNG INQ ABOUT BILL AMOUNT*ADV 2 MONTH BILL AND ADV OF BILL AMOUNT FRM JAN-PRESENT

Record Actions

Edit

Record Information

Characteristics

Characteristic Type	Characteristic Value
Account	BLACK,JUNG S, Residential, \$111.54

Customer Contact Reminders

Add Reminder

Add Reminder

Customer Contact Info	BLACK,JUNG S, 16126 RAMBLING VINE DR E, TAMPA, FL, 33624, SFH (Sub NO/DALE F U1 VILAS NO/D) , Customer service contacts / Bill or Account Related, Contacted 10-10-2023
Reminder	<input type="text"/>
Reminder Type	Send to User <input type="button" value="▼"/>
Send To	YTHOMAS <input type="button" value="🔍"/> Thomas - PROD, Yarmilia
Trigger Date	11-01-2023 <input type="button" value="📅"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Pending To-Do Follow Up Procedure

- Click on the **Customer Contact Callback** hyperlink

To Do Summary

To Do Type	Assigned to You
Customer contact callback	<input type="text"/>

- Click on the **customer's name under message**

To Do List

Main	INFO	Customer contact callback, Carroll - TEST, Jomar	TO DO TYPE	TD-CCCB <input type="button" value="🔍"/>		
SORT BY	Extra Information <input type="button" value="▼"/>	DATE <input type="button" value="📅"/>	SEARCH <input type="button" value="Search"/>	EXTRA INFO Person Name <input type="button" value="🔍"/>		
FILTER BY	Being Worked On <input type="button" value="▼"/>					
Select All <input type="button" value=""/>	Clear All <input type="button" value=""/>					
	PRIORITY	CREATE DATE/TIME	RELATED	ASSIGNED DATE/TIME	MESSAGE	TO DO ENTRY STATUS
<input type="checkbox"/>	Priority 30	09-17-2021 10:44:33PM	0	09-17-2021 10:44:33PM	Customer Contact reminder: ALDWELL DOWNES,FRANCES M	Being Worked On

Abbreviations

@	At	DEP	Deposit
A/OFF	Already Off	DISC	Disconnect
A/ON	Already On	DREF	Deposit Refund
ACCT	Account	DRWY	Driveway
ACT	Actual	F/U	Follow Up
ADD	Address	FNC	Fence
ADJ	Adjustment	FSR	Field Service Representative
ADV	Advise	FT	Feet
AFT	After	H/CONS	High Consumption
AUTH	Authorized	HCC	Highly Concerned Customer
AVAIL	Availability	HCWD	Hillsborough County Water Dept.
BAL	Balance	HIST	History
BME	Broken Meter Estimate	HSE	House
BOCC	Board of County Commissioners	HUSB	Husband
BRKN	Broken	INF	Information
BUS	Business	INQ	Inquiry
C/S	Customer Service	INVSTG	Investigation
C/STP	Curb Stop	IRR SYS	Irrigation System
CA	Cash	IRR SYS	Irrigation System
CHG	Charge	L/TAG	Left Tag
CHK	Check	LCK	Lock
CHV	Customer Hand Valve	LK	Leak
CLLD	Called	LK/ADJ	Leak Adjustment
CMA	Change Mailing Address	LOC	Location
CO	Company	M/A	Mailing Address
COL	Collect	M/BK/YD	Meter In Back Yard
COMM	Commercial	M/BOX	Meter Box
CONN	Connection	M/O	Money Order
CORRES	Correspondence	ML/BOX	Mail Box
COT	City of Tampa	MLD	Mailed
CRD CK	Credit Check	MOS	Months
CRL	Credit Reference Letter	MR	Husband of Mrs.
CRNR	Corner	MTR	Meter
CSR	Customer Service Rep.	N/A	Not Accepted
CUST/RD	Customer Read	N/C	New Customer
CUST	Customer	NME	Name

NXT	Next	T/OFF	Turn Off
OCC	Occupied	T/OFF/LCK	Turned Off Locked
P/A	Payment Assistance	T/OFF/SL	Turned Off Slugged Service
P/F	Pending File	TRF	Transfer
P/L	Property Line	VCNT	Vacant
PD/REC	Paid Receipt	VER	Verify
PREM	Premise	VML	Voicemail
PREV	Previous	W/O	Work Order or Without
PROP	Property Line	WA	Water
PYMT	Payment	WCB	Will Call Back
R/V	Read Verified	WRI	Water Running Inside
NXT	Next		
OCC	Occupied		
P/A	Payment Assistance		
P/F	Pending File		
P/L	Property Line		
PD/REC	Paid Receipt		
PREM	Premise		
PREV	Previous		
PROP	Property Line		
PYMT	Payment		
R/V	Read Verified		
RCLM	Reclaim		
RD	Read Verified		
RECD	Received		
RES	Residential		
S/C	Service Charge		
S/D	Subdivision		
S/O	Service Order		
S/U	Set Up		
SND	Send		
SS#	Social Security #		
SVC/LK	Service Leak		
SWR	Sewer4		
SYS	System		
T/On	Turn On		

Abbreviation (Review)

After looking over the abbreviations, please complete the following activity as review:

[Kahoot: Guess that Abbreviation!](#)

Chapter Three: Basic New Service Procedures

How to Use CCS PROD and Test

As mentioned previously, CCS is what we use to manage our customers water accounts. Luckily, we have a “test” environment for CCS, which means that when in CCS Test we are able to alter or change any component of a customer’s account without making those changes “in real life”. While using CCS will take practice, these next few diagrams show what you the basic uses and features are.

Customer Cloud Service

Control Central Search Account Information AD

Control Central

Account Information Customer Information Account Tree Premise Tree Bill/Payment Tree Payment Agreements

Bookmark Clear Save Refresh

Next Bill Date 05-22-2024

Current Context

Person FIGHT,MEGHAN P

Account ID 610344149 FIGHT,MEGHAN P, Residential, \$0.00

Current Balance \$0.00

Premise 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E)

Start Service Stop Service

Customer Information (Map Zone)

Account ID 610344149 Main Customer FIGHT,MEGHAN P Set Up Date 09-29-2017 CIS Division HCWRS Customer Class Residential Bill Cycle Bill Cycle - 16 Current Credit Rating 1000 Next Credit Review Date 05-21-2024 Auto Pay Source Hillsborough - AP - Checking Cell Phone (813) 625-9199 Social Security *****7925 Email Address meghan.fight@gmail.com

SA Premise List

Premise	Current Balance	Payoff Balance	SA Information
8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E)	\$0.00	\$0.00	HCWRS / Waste Water Residential, WW-MTR, Active, 10-02-2017, 610344101
8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E)	\$0.00	\$0.00	HCWRS / Water Residential, W-MTR, Active, 10-02-2017, 610344750

Premise Information

Premise Information 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E) CIS Division HCWRS Building Permit Issuance Date (YYYY-MM-DD) 02/2011-04-18 Impact Fee Assessment Program Date 09/05/16 Certificate of Occupancy Date (YYYY-MM-DD) 02/2011-07-22 Connection Fee Payment Method Impact Fee Assessment Program Service Area 5South Service Point Information 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 12, Eagle Palm / Active / 41912746 41912746 / Water Analog Meter / Effective Date/Time:01-19-2011 12:00:00AM EDT / Water Single Manual Register - Gallons - Scalar / 1 Measuring Component(s) / Active 06-17-2024 12:00:00AM / Cycle 12 / - Expected Work Date: 06-18-2024 Last Measurement Value: 1900.000000, Regular 05-17-2024 10:25:30AM EDT, Measurement: 5.035, Previous Measurement: 5.016

Account Financial History

Bill Graph

Billed Consumption

Account Activity History

Here is an overview of the account home page.

Current Context

FIGHT,MEGHAN P 610344149 FIGHT,MEGHAN P, Residential, \$0.00 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E)

Current To Do

Assign me a To Do

Favorite Links

To Do + [1] Customer Contact + [2] Pay Plan + [3] Online Utility Exchange [4] IWR Website [5] Water Wastewater Provider [6] Property Appraiser Website [7] Watering Restrictions [8] Solid Waste [9] CAMS BI Publisher Neptune 360 Portal

Full Context

FIGHT,MEGHAN P 610344149 FIGHT,MEGHAN P, Residential, \$0.00 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E) 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 12, Eagle Palm / Active / 41912746 41912746 / Water Analog Meter / Install Date/Time: 05-17-2011 12:00:00PM EDT / On / Active 41912746 / Water Scalar Gallons - Manual

Customer Cloud Service



Control Central

Account Information

Customer Information

Account Tree

Premise Tree

Bill/Payment Tree

Payment Agreements

Current Context

Person	⌚ FIGHT,MEGHAN P	Account Holders Name
Account ID	⌚ 6110344149	1 FIGHT,MEGHAN P, Residential, \$0.00 Account Number
Current Balance	\$0.00	Account Balance
Premise	⌚ 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E1)	Account Address

Customer Information (Map Zone)

Account ID	6110344149	⌚ Account Number
Main Customer	FIGHT,MEGHAN P	⌚ Account Holders Name
Set Up Date	09-29-2017	⌚ Account Creation Date
CIS Division	HCWRS	⌚ Water Division
Customer Class	Residential	⌚ Account Type
Bill Cycle	Bill Cycle - 16	⌚ Bill Date
Current Credit Rating	1000	⌚ On-Time Payment Score
Next Credit Review Date	05-21-2024	
Auto Pay Source	Hillsborough - AP - Checking	⌚ Account Payment Type
Cell Phone	(813) 625-9199	⌚ Account Holder Phone Number
Social Security ⓘ	*****7925	⌚ Account Holder Social Last 4
Email Address	meghan.fight@gmail.com	⌚ Account Holder Email
Spouse	HENDERSON,COLUMBUS	⌚ Additional Financially Responsible Person

SA Premise List

Premise	Account Address	Current Balance	Payoff Balance	SA Information	Services Offered
⌚ 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E1)		\$0.00	\$0.00	⌚ HCWRS / Waste Water Residential, WW-MTR, Active, 10-02-2017, 6110344101	
⌚ 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E1)		\$0.00	\$0.00	⌚ HCWRS / Water Residential, W-MTR, Active, 10-02-2017, 6110344750	

Premise Information

Premise Information	8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E1)	⌚ Account Address
CIS Division	⌚ HCWRS	⌚ Water Division
Building Permit Issuance Date (YYYY-MM-DD)	⌚ 2011-04-18	
Impact Fee Assessment Program Date	⌚ R05-106	
Certificate of Occupancy Date (YYYY-MM-DD)	⌚ 2011-07-22	
Connection Fee Payment Method	⌚ Impact Fee Assessment Program	
Service Area	⌚ South	⌚ County Dispatch Area
Service Point Information	8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 12, Eagle Palm / Active / 41912746	Premise Provided Services
Device Configuration	41912746 / Water Analog Meter / Effective Date/Time:01-19-2011 12:00:00AM EDT / Water Single Manual Register - Gallons - Scalar / 1 Measuring Component(s) / Active	
Next Meter Read	06-17-2024 12:00:00AM(Cycle 12) - Expected Work Date: 06-18-2024	⌚ Next Meter Read
Last Measurement	Value: 1,900.000000, Regular 05-17-2024 10:25:30AM EDT, Measurement: 5,035, Previous Measurement: 5,016	⌚ Last Meter Read (Gallons and Date/Time)
		Meter Type

Account Financial History

Bill Graph

Billed Consumption

Account Activity History

Favorite Links

- [1] To Do +
- [2] Customer Contact +
- [3] Pay Plan +
- [4] Online Utility Exchange
- [5] IWR Website
- [6] Water Wastewater Provider
- [7] Property Appraiser Website
- [8] Watering Restrictions
- [9] Solid Waste
- CAMS
- BI Publisher

Create To-Do

- Add new notes to account
- Add new pay plan
- Used to run credit check
- Payment processing and password reset
- Find premise water wastewater provider
- Premise owner/ property information
- Irrigation watering days
- Used by Solid Waste department
- Used by team leads and line Maintenance
- Used to generate letters sent to customer

Financial Information

Current Balance \$33.82
 Payoff Balance \$-111.18
 Last Payment 06-15-2022, \$85.70
 Last Billed 06-21-2022, \$33.82, Due Date 07-12-2022
 Previous Bill 05-20-2022, \$81.62
 Next Bill Date 07-21-2022

Current balance- Total amount owed includes (current/ past due/ fees)
Last payment- Last payment received (date and amount)
Last billed- current bill amount and due date
Previous bill- Previous bill/past due amount if no payment was received
Next Bill date- Next bill print date.
 (used to determine how far a payment plan can be set)

Account Information

sh arch AD

Next Bill Date 05-22-2024

Current Context

Takes you to Person Page FIGHT,MEGHAN P Account Holder Name
 Takes you to Account Page 61103441491 FIGHT,MEGHAN P, Residential, \$0.00 Account Number, Name, Type, Balance
 Takes you to Premise Page 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E1) Account Address

Full Context

Account Holder Name FIGHT,MEGHAN P
 Account Type and Balance FIGHT,MEGHAN P, Residential, \$0.00
 Account Address 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578, SFH (Sub MAGNOLIA PARK SE PARCEL E1)
 Premise Services 8648 TURNSTONE SHORE LN, RIVERVIEW, FL, 33578 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 12, Eagle Palm / Active / 41912746
 Meter Type 41912746 / Water Analog Meter / Install Date/Time: 05-17-2011 12:00:01PM EDT / On / Active
 Meter Measurements 41912746 / Water Scalar Gallons - Manual

Always Check Alerts

When you log into CCS and pull up an account, at the top right you are going to see the Alerts section.

This is **IMPERATIVE** when assisting customers as this will showcase the most important details of the account. Below are the types of alerts you could see on customers' accounts.

The screenshot shows the CCS software interface with the 'Alerts' section highlighted by a red circle. The alerts listed are:

- Last Contact: 11 days ago - System,English
- Active Write Off Process
- Premise Has Multiple Accounts
- 2 Outstanding To Do Entries For Premise
- Stopped SAs Exist
- 6 sync request(s) outstanding

Below the alerts is a 'Financial Information' section with the following details:

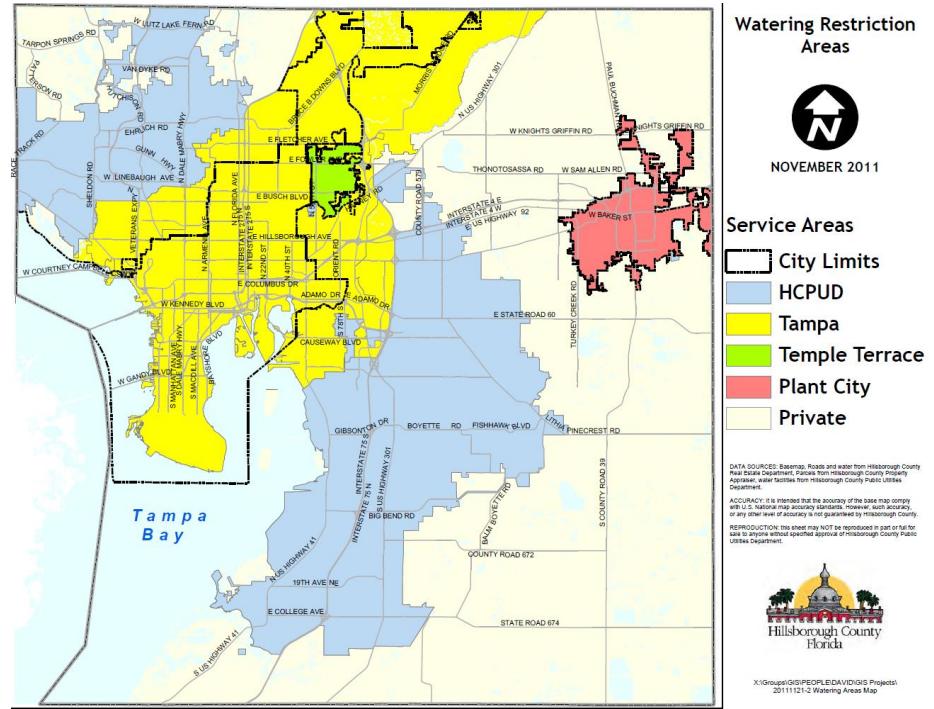
- Current Balance \$71.39
- Last Payment 05-24-2024, \$18.33
- Last Billed 06-11-2024, \$71.39, Due Date 07-02-2024
- Previous Bill 05-17-2024, \$86.79
- Next Bill Date 07-11-2024

1 NEW SERVICE		
2 Pending Stop	Possible Match With Move	cancel field activity and send email to dispatch
3 Field Activity Pending	Possible Unauthorized Usage	check field activity for last 30 days and usage history
4 Last contact < 30 days	Review for previous calls notes	
5 Unauthorized Usage	Unauthorized fees and Backbill fees apply	new customer needs to provide lease or closing papers
6 Past Due at Premise	No new customer	new customer needs to provide lease or closing papers
7 No New customer/lien	Lien has to paid before	Transfer to Credit Management for more information
8 Pending Start (past date)	If it's pending, but the date already past send to Support Chat	CSR needs to follow up with support for update to set up account
9 Pending Start (future date)	Needs to be completed before new customer can start	CSR needs to set reminder and follow up to set up account
10		
11 CUSTOMER SERVICE		
12 Security password	No changes to account or services	Customer needs to verify
13 Public Information Restricted	Limited to only premise information	Can't provide any personal information to the public
14 Refer To Supervisor	Review with Team Lead	
15 Last contact < 30 days	Review for previous calls notes	
16 Collection process active	Past due on account	Past due needs to be paid before transfer or adding additional serv
17 Severance Process Active	Full payment required to avoid disconnection	Transfer to Credit Management for payment options
18 Cash only	No check payments	
19 Credit card eligible	No card Payments	
20 Autopay active		cancel or update needs to be made by customer on IWR
21 Payment Arrangement active	Pay Plan not allowed	Send to Credit Management for any questions, service transfer or stop
22 Pay plan active		Send to Credit Management to modify or cancel pay plan
23 Arears Disconnect	Severance was completed	Full Past due balance and fees need to be paid for next day reconnect
24		
25 CREDIT MANAGEMENT (Transfer to ext #43800)		
26 Liens	Lien on premise or Account	
27 Payment Arrangements		
28 Bankruptcy or Bankruptcy history		
29 Severance Process Active		
30 Encumbrance		
31		
32 SERVICE AVAILABILITY (Transfer to ext #13611)		
33 Unpaid Capacity Fees Due	Make sure fees are related that premise	Check SA premise list to verify fees are still active with a balance
34 No New Customer/ Water Impact Fee	Make sure fees are related that premise	Check SA premise list to verify fees are still active with a balance
35 No New Customer/ Waste-water impact fee	Make sure fees are related that premise	Check SA premise list to verify fees are still active with a balance

Service Points (W/WW/Reclaim)

In Hillsborough County, we offer three types of services for the qualifying premises (addresses). Those three services are **water (W)**, **wastewater (WW)**, and **reclaimed water** (Reclaim). While not every premise might receive *all* of these services, they would most likely qualify for one if they are in our service area. Here are some examples...

- A premise might need potable water, but they have a septic tank, so they don't need wastewater.
- A premise might have a well for potable water but need wastewater.
- A premise might need potable water and wastewater but be in an area that isn't receiving reclaimed water.



The type of services provided, and the number of service points affect deposit amounts, same-day fees, and field activities

- Service Area: Used for line Maintenance and match with move scenarios.
- Service Points: A type of service provided and used for deposit information.
- Device: Provides the meter information.
- Next Meter Read: The date CCS will schedule next meter read.
- Expected Work Date: The day the work order will be completed.

A premise with one service point:

**A premise
with two
service
points
(multiple
meters):**

Premise Information

PREMISE INFORMATION	5706 COLONY GLEN RD, LITHIA, FL, 33547, SFH (Sub FISHHAWK RANCH WEST PH 2B)
CIS DIVISION	HCWRS
BUILDING PERMIT ISSUANCE DATE (YYYY-MM-DD)	2017-12-15
IMPACT FEE ASSESSMENT PROGRAM DATE	R05-106
CERTIFICATE OF OCCUPANCY DATE (YYYY-MM-DD)	2018-08-02
CONNECTION FEE PAYMENT METHOD	Impact Fee Assessment Program
SERVICE AREA	South
SERVICE POINT INFORMATION	
DEVICE	5706 COLONY GLEN RD, LITHIA, FL, 33547 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 04, Mosi Water Analog Meter / Effective Date/Time:03-13-2018 12:00:00AM EDT / Water Single Manual Register
NEXT METER READ	07-01-2022 12:00:00AM(Cycle 04) - Expected Work Date: 07-05-2022
LAST MEASUREMENT	Value: 43.0, Regular 06-03-2022 1:17:10PM EDT, Measurement: 4,749, Previous Measurement: 4,706

Premise Information

PREMISE INFORMATION	11742 ALBATROSS LN, RIVERVIEW, FL, 33569, SFH (Sub ESTUARY PHASE 5)
CIS DIVISION	HCWRS
BUILDING PERMIT ISSUANCE DATE (YYYY-MM-DD)	2014-08-18
IMPACT FEE ASSESSMENT PROGRAM DATE	R05-106
CERTIFICATE OF OCCUPANCY DATE (YYYY-MM-DD)	2015-01-16
CONNECTION FEE PAYMENT METHOD	Impact Fee Assessment Program
SERVICE AREA	South
SERVICE POINT INFORMATION	
DEVICE	11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, R Water Analog Meter / Effective Date/Time:08-07-2014 12:00:00AM EDT / Water Single Manual Register
NEXT METER READ	07-21-2022 12:00:00AM(Cycle 17) - Expected Work Date: 07-22-2022
LAST MEASUREMENT	Value: 0.0, Regular 06-23-2022 12:48:23PM EDT, Measurement: 2,340.000000, Previous Measurement: 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / Water Only Irrigation Residential Meter Size <= 1-1/2" / Water Analog Meter / Effective Date/Time:08-07-2014 12:00:00AM EDT / Water Single Manual Register
SERVICE POINT INFORMATION	07-21-2022 12:00:00AM(Cycle 17) - Expected Work Date: 07-22-2022
DEVICE	Value: 0.0, Regular 06-23-2022 12:38:49PM EDT, Measurement: 18,878.000000, Previous Measurement
NEXT METER READ	
LAST MEASUREMENT	

If there is no active customer at the premise, locate the Premise Information found on the Main page and check for "device".

Example #1: Water is off, but there is an active Device.

- This account can start new services.

Control Central

Bookmark Clear Save Refresh

Account Information Customer Information Account Tree Premise Tree Bill/Payment Tree

Current Context

Person

Account ID

Premise 211 TERRACE DR, BRANDON, FL, 33510, SFH (Sub BRANDON)

SA Premise List

Premise Information

Premise Information 211 TERRACE DR, BRANDON, FL, 33510, SFH (Sub BRANDON)

CIS Division

Building Permit Issuance Date (YYYY-MM-DD)

Certificate of Occupancy Date (YYYY-MM-DD)

Service Area

Service Point Information

Device

Next Meter Read

Last Measurement

Example #2: Water is off, and there is no device information.

- **DO NOT** start service at this premise. See your Analyst or Supervisor with questions.

Control Central

Bookmark Clear Save Refresh

Account Information Customer Information Account Tree Premise Tree Bill/Payment Tree

Current Context

Person Account ID Premise 1911 BLUE STREAM ST, RUSKIN, FL, 33570, SFH (Sub BROOKSIDE ESTATES 1,2-SHERWOOD MANOR1B)

Start Service Stop Service

SA Premise List

Premise Information

Premise Information 1911 BLUE STREAM ST, RUSKIN, FL, 33570, SFH (Sub BROOKSIDE ESTATES 1,2-SHERWC)
CIS Division HCWRS
Impact Fee Assessment Program Date R05-106
Connection Fee Payment Method Impact Fee Assessment Program
Service Area South
Service Point Information 1911 BLUE STREAM ST, RUSKIN, FL, 33570 / WA/WW RESIDENTIAL Meter Size <= 1-1/2"

Premise Information

PREMISE INFORMATION 1911 BLUE STREAM ST, RUSKIN, FL, 33570, SFH (Sub BROOKSIDE ESTATES 1,2-SHERWOOD MANOR1B)

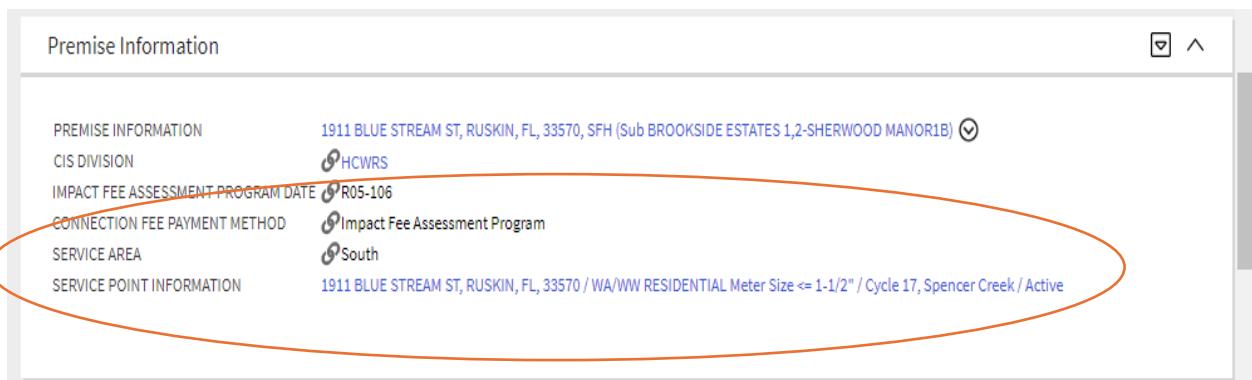
CIS DIVISION HCWRS

IMPACT FEE ASSESSMENT PROGRAM DATE R05-106

CONNECTION FEE PAYMENT METHOD Impact Fee Assessment Program

SERVICE AREA South

SERVICE POINT INFORMATION 1911 BLUE STREAM ST, RUSKIN, FL, 33570 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Spencer Creek / Active



New Service Request

Scenario: The customer doesn't have services at another premise and the water is off at the new premise
(not an option for transfer or adding additional services)

- On Fridays or before a holiday, but before 3:30 pm.
- No same day after 4:30 pm unless approved by a manager and call/email to dispatch
- Same-day new services fee of \$35 will apply (if more than one meter, the \$35 fee will be per meter)
- The customer can elect to start on the next business day for no additional charge
- If the deposit is required: the customer will pay the deposit, set up fee, and same-day fee upfront
- If the deposit is waived: the set-up fee and the same-day fee will be billed.
- Waste water only premise is scheduled for next business day

Start customer as normal for today's date

SA Premise List			
PREMISE	CURRENT BALANCE	PAYOFF BALANCE	SA INFORMATION
② 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, SFH (Sub SUN CITY CENTER)	\$0.00	\$0.00	② HCWRS / One Time Premise Charge, Pending Start, 07-01-2022 - 07-01-2022, New Customer - Existing Premise, 9841842111
② 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, SFH (Sub SUN CITY CENTER)	\$0.00	\$0.00	② HCWRS / Water Residential, W-MTR, Pending Start, 07-01-2022, 9845660326
② 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, SFH (Sub SUN CITY CENTER)	\$0.00	\$0.00	② HCWRS / Waste Water Residential, WW-MTR, Pending Start, 07-01-2022, 9849505593

Go to **Premise Activity Overview** on the Account Information page

Locate today's field activity and click on **Activity in Progress**

Premise Activity Overview		
	FA DATE/TIME	FA INFORMATION
⌚ 1	07-01-2022 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Start/Stop Service Request, Start Service, Pending, 07-01-2022 12:00:00AM ⓘ

Activity Hierarchy	
⌚	Enable Service Type / 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, USA / 07-05-2022 5:18:41AM / 07-01-2022 12:00:00AM EDT // Activity in Progress
⌚	Field Activity / Turn On Meter / Customer to Meter / 2243266786 / Communication In Progress / Create Date Time: 07-05-2022 5:18:44AM
⌚	Field Activity Outbound Communication / Outbound / Awaiting Response / 07-05-2022 5:18:45AM

Click
on
**Initiate
Cancel**

Main	Record Actions
<p>INFORMATION</p> <p>ACTIVITY TYPE</p> <p>STATUS</p> <p>SERVICE DATE TIME</p> <p>PARENT ACTIVITY</p> <p>SERVICE POINT</p> <p>FIELD TASK TYPE</p> <p>RECIPIENT</p>	<p>Field Activity / Turn On Meter / Customer to Meter / 2243266786 / Communication In Progress / Create Date Time: 07-05-2022 5:18:44AM</p> <p>Field Activity</p> <p>Communication In Progress</p> <p>07-05-2022 5:18:44AM EDT</p> <p>Enable Service Type / 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, USA / 07-05-2022 5:18:41AM / 07-01-2022 12:00:00AM EDT // Activity in Progress</p> <p>1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 14, Cherry Hills / Active ⓘ</p> <p>Turn On Meter</p> <p>Field Services</p>
	<p>Edit</p> <p>Initiate Update</p> <p>Initiate Cancel</p> <p>Retry</p> <p>Complete</p>
	<p>Record Information</p> <p>Request Information</p> <p>Contact Details</p> <p>Address Information</p> <p>ADDRESS 1111 EL RANCHO DR</p> <p>CITY SUN CITY CENTER</p>

Select **Customer Request** as the reason to cancel the Field activity

Cancel Orchestration Activity	
Main	
ORCHESTRATION ACTIVITY	87748359110414 ⓘ
RELATED ACTIVITY	24416250715710 ⓘ
REQUESTER	Customer to Meter
REQUESTER TRANSACTION ID	2243266786
REQUESTER USER	SYSUSER
EXTERNAL REFERENCE ID	23538120838887
CANCEL REASON	Customer Requested
	<p>Save</p> <p>Cancel</p>

Go to the **Current Context** and click on the **Premise** hyperlink

The screenshot shows a 'Current Context' panel with three items:

- A user icon with the name "DOE,JANE" and a drop-down arrow.
- An account icon with the ID "9844735882 5" and the name "DOE,JANE, Residential, \$0.00" followed by a drop-down arrow.
- A house icon with the address "1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, SFH (Sub SUN CITY CENTER)" and a drop-down arrow. This item is highlighted with an orange circle.

Click on the drop-arrow at the end of "SP" and select **Add Field-Related Activity**

- If there is more than one meter at the premise, CSR will need to create a field activity for each meter

The screenshot shows a navigation pane with the following items:

- Premise - 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573, SFH (Sub SUN CITY CENTER) (with a drop-down arrow)
- SP - 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 14, Cherry Hills / Active (with a drop-down arrow circled in orange)
- Account - 9844735882 DOE,JANE, Residential, \$0.00 (with a drop-down arrow)
- Historical service agreement(s) exist.

Set the field activity for today's date and select **Fld Svc New Service same day T/ON with fee**

(No Instruction is required)

The screenshot shows the 'Field Activity' creation screen with the following fields filled:

Main	Value
ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	07-01-2022 12:00:00AM EDT
PARENT ACTIVITY	(Search icon)
SERVICE POINT	224690049300 1111 EL RANCHO DR, SUN CITY CENTER, FL, 33573 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 14, Cherry Hills / Active
EXTERNAL SERVICE POINT ID	(Empty)
FIELD TASK TYPE	Fld Svc New Service Same Day T/ON with Fee (highlighted with an orange circle)
APPOINTMENT WINDOW	(Empty)
DATE TIME	(Empty)
APPOINTMENT END DATE	(Empty)
TIME	(Empty)
TAKEN BY	(Empty)
TAKEN DATE	(Empty)
COMMENTS	(Empty)
RECIPIENT	(Empty)



Chapas, Jason 10:32 AM

Friday emails/calls are not needed until after 4:30pm. Monday thru Thursday we ask to be notified throughout the day due to the "out of the norm" popup that may come up.

How to Look Up an Account

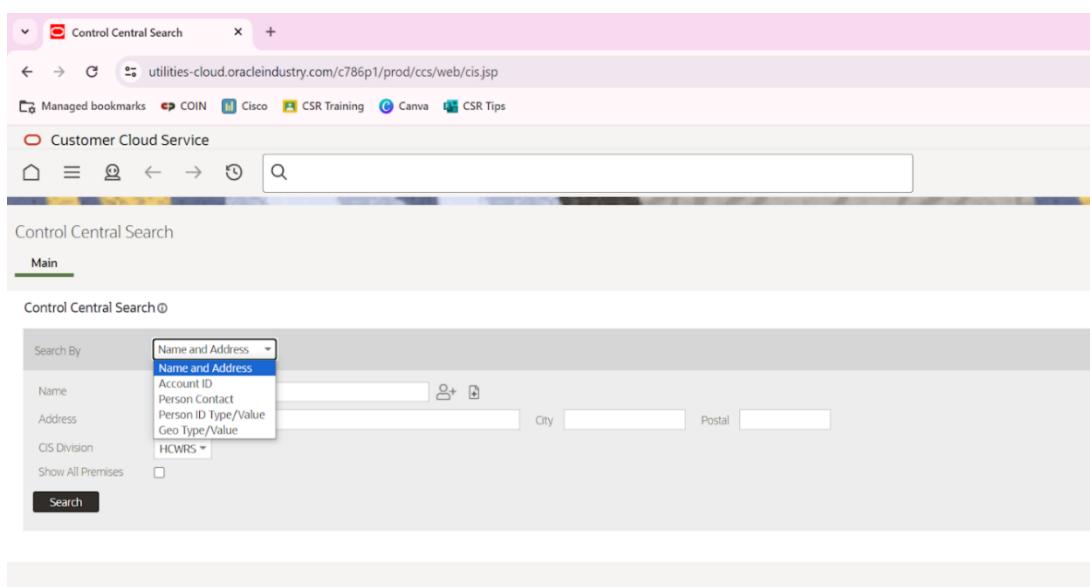
When a customer calls in, there are a few ways to look up an account. You can do this by entering their:

- Name
- Address
- Social Security Number **OR**
- Account Number

The best idea is looking up the customer by the address they want service at. This is because if you type in a name or social security/account number, they might own multiple properties. If the customer owns multiple properties, there might be confusion as to what/where the service is needed. An easy way to decrease time or confusion is starting with the address.

Another benefit to looking up the address is determining the services available to that customer. If the address is determined before any other information (name, phone number, social, etc.) the customer won't have to reveal that private information unnecessarily, especially if they aren't in HC service area. The CSR will also save

time by figuring out we don't service that address, so there is no need to go through any further processes.



CSR Starting Service Script

Thank you for calling the Water Resources Department, my name is _____, and we are on a recorded line. How may I help you today?

May I have the address to start services?

- Review type of service provided
- Check field activity for pending starts or stops
- Check for past due balances
- Check alerts for lien (no new customer) ---if yes, transfer to credit management

Open another screen and ask...

Do you currently have service with us or have you ever had service with us?

- If yes, get name or SSN (to locate the account)—can check premise historical data. Verify phone number and email address-make changes if needed
- If no, create profile (check the boxes)

Go back to the screen with the premise...

At this location, we service the _____. There is a standard deposit of \$____ + a \$25 setup fee. The total amount due will be \$_____

\$90 water only + \$25 = \$115

\$165 wastewater only + \$25 = \$190

\$185 water/wastewater + \$25 = \$210

Since you are a new customer, we offer a one-time, one per household credit check to possibly waive the deposit. Is this something that you will be interested in?

If customer agrees to have credit check run,

“May I place you on a brief hold in order to run the credit check?”

After running a credit check, give results and continue with set up.

- Credit Check – “GREEN”- no deposit is required; **Thank you for holding, the deposit has been waived; you will be billed a \$25 set up fee”**
- Credit Check – “RED” – **“Thank you for holding _____, a deposit is required to start services. You will have to make a \$_____ by 5PM to start service on (date). I will share the options for payment at the end of the call.”**

The remainder of the call will just be completing the final steps with CCS. Most of which doesn’t have to be done on the phone if everything is confirmed (address, service date, updated mailing address, etc.).

How to Create Profile

CREATING A PROFILE IN CCS

The screenshot shows the Oracle Customer Cloud Service (CCS) interface. On the left, there are three main sections: Person Information, Person Contacts, and Person IDs. Each section has a numbered callout indicating the step in the process:

- Step 1:** In the top-left search bar, a dropdown menu is open under "Search By". The "Name and Address" option is selected. A purple circle with the number 1 is highlighting this area.
- Step 2:** The search bar now contains the name "HARRIS,KRISTIN L". An orange circle with the number 2 is highlighting this input field.
- Step 3:** In the "Person" tab of the Person Information section, the "Name Type" is set to "Primary" and the "Person Name" is "HARRIS,KRISTIN L". A red circle with the number 3 is highlighting the "Name Type" dropdown.
- Step 4:** In the "Person Contacts" section, there are two entries: a phone number "(650) 805-4955" and an email "harris@live.com". The "Primary Email" checkbox is checked. A pink circle with the number 4 is highlighting the "Primary Email" checkbox.
- Step 5:** In the "Person IDs" section, there is a table with columns: Primary ID, ID Type, ID Number, and Identifier Format. The "ID Type" is "Social security number", the "ID Number" is "099-99-9999", and the "Identifier Format" is "999-99-9999". A blue circle with the number 5 is highlighting the "Add Account and Start Service" checkbox at the bottom left of the table.

1 In the drop down search bar, choose a field to look up. Making a new account? Type in **ALL CAPS** the full name with middle initial and press enter. If a profile doesn't come up, then press Previous account holder? Look up their name, account number, social, or address.

2 Once the customers needs are determined, search with the most appropriate field.

3 Start making the profile. The name you typed in on the home page should auto-populate.

4 Next, enter the cell phone and email of the account holder. Make sure to click the primary boxes.

5 Lastly, unclick the “add account and start service” until the customer has agreed to paying the deposit and starting service on a determined date.

Just press save (top right), and you're done!

Website to Register Account

When you create a CCS account for a customer, you will be required to let them know about what they can do by creating an online account. On this online account they can update their contact information, change their billing method, set-up autopay, and pay their water bill. This website is **govone.com/waterbill** and **this guide** is there as well.

Setting up your new password & personal profile:

1. To begin, go to <https://www.hillsboroughcounty.org/waterbill>. You will be directed to an **Online Account Information Login** screen. First time users must start by registering their account.

Tap **click here** to be navigated to the User Registration page.

The screenshot shows the 'Login' page for the Hillsborough County Water Resources Department. At the top, it says 'Hillsborough County Water'. Below that is a 'Login' button. Underneath, it says 'Online Account Information' and 'Welcome to the Hillsborough County Water Resources Department Online Account Information Service.' It lists several options: 'View your account information online', 'Make a credit card or ACH withdrawal payment on your account', 'Check your water usage and see a reflection of your bill', 'Request for a service provider on your account', 'Request a payment extension', and 'Update the contact telephone number(s) and mailing address for your account'. A blue arrow points to the 'Click here to register' link, which is highlighted in red. Below this, there are fields for 'Username' (with placeholder 'Account#'), 'Password', and 'PIN'. There are also 'Forgot Username', 'Forgot Password', and 'Log In' buttons. At the bottom, a note states: 'Please note our system will be down for monthly scheduled maintenance from 7:00 PM - 9:00 PM (EST) on the 1st and 3rd Friday of each month and every Sunday between 1:30 AM and 4:00 AM.'

2. Once you have navigated to the User Registration page enter your 10-digit

Hillsborough County Water Resources Account Number in the Account Number field. Then enter the last 4 digits of the Social Security Number or the Federal Identification number in the PIN field. Check **I'm not a robot**, then click the **Submit** button. This will take you to the **User Registration Profile** screen.

Tip(s): This pin is temporary and once changes are updated becomes invalid.

The screenshot shows the 'User Registration' page. At the top, it says 'Hillsborough County Water'. Below that is a 'User Registration' button. Underneath, it says 'Please enter your 10 digit Utility account number as Account Number and last 4 digits of your Social Security Number (SSN) or your Federal ID number as PIN (Do not enter spaces, dashes, or periods). You will then be taken to the User Registration Profile page to establish a new user name and a new user password.' There are fields for 'Account Number' (with placeholder 'Account Number'), 'PIN' (with placeholder 'PIN'), and a 'I'm not a robot' checkbox. Below these is a 'Submit' button.

3. On the User Registration Profile screen, you will be asked to create a new username, a password, and update your email address including confirmations. Check I'm not a robot and tap Create Account.

Tip(s):

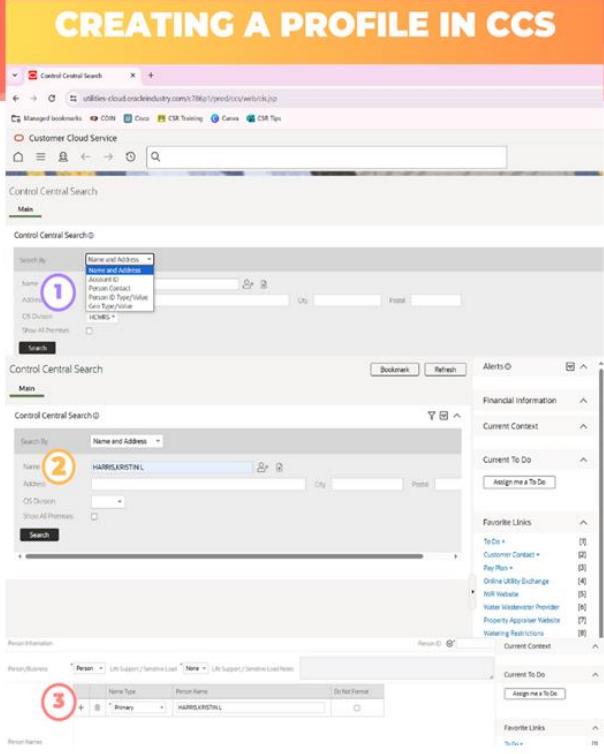
- For security reasons, your Username will become a permanent record to your account as is your Water Resources account number. They cannot be modified after initial registration.
- Select a Username that is not easily forgotten. Keep in mind a Username of your choosing may have already been registered by another user requiring you to select another.
- Passwords must be at least 8 characters and a maximum of 64 characters in length.
- It will also require 1 upper case, 1 lower case, 1 number and 1 special password special character must be one of the following !@#\$%^&*
- All other special keyboard characters are invalid.
- Your email address becomes a critical tool when utilizing the new online self Any future request to retrieve forgotten Password or Username will require against the email record on file.
- Please save your registration information in a secured manner for future ref necessary.

4. Now that the user has tapped **Create Account**, the user will be navigated to the Verification page. Using the email provided on the **User Registration Profile** page the user will be sent an email with a **verification code**. Enter the **verification code** in the field provided, then tap **Submit**.

5. The user can update their contact information, the Phone Number and Email Address fields are required. Lastly tap the **Update** button to be navigated to the users Home page.

Important Message: It is important all users enter their cell phone number; this will be used to communicate emergency and account related information.

Steps to Start a Service



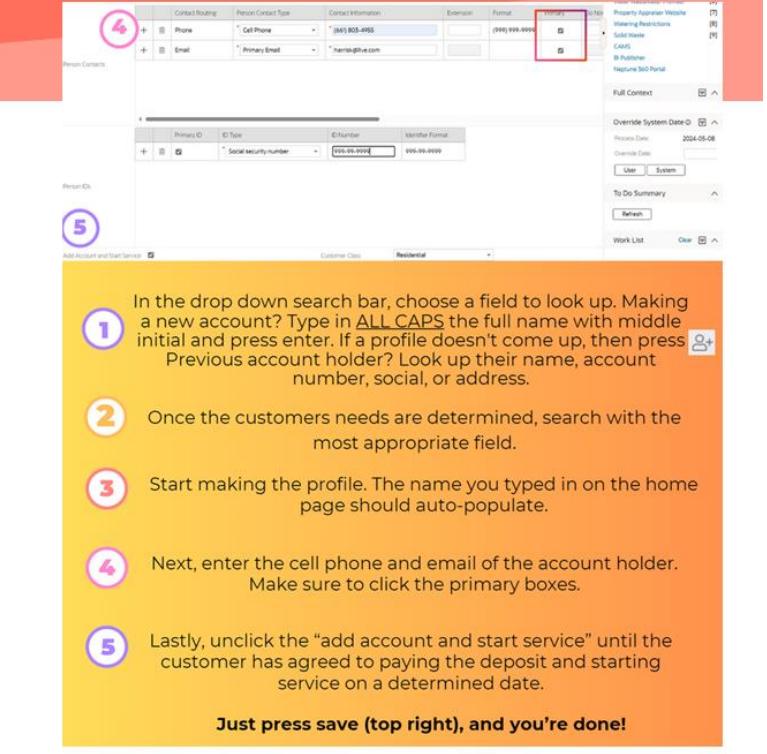
CREATING A PROFILE IN CCS

Control Central Search

Search By: Name and Address
Name: HARRISKRISTINL
Address:
CIS Division: Show All Premises

Person Information: Person/Business: Person - Name Type: Primary - Person Name: HARRISKRISTINL

Step 1: Select Name and Address from the search dropdown.
Step 2: Type HARRISKRISTINL into the search bar.
Step 3: Set Person Type to Primary.



Person Contacts: Contact Routing: Phone: (888) 803-4955; Email: harriskr@live.com
Person ID: Primary ID: Social-Security-number: 999-99-9999
Primary ID Type: Social-Security-number
Primary Format: 999-99-9999

Step 4: Enter contact information (Phone and Email).
Step 5: Uncheck the "Add account and start service" checkbox.

In the drop down search bar, choose a field to look up. Making a new account? Type in ALL CAPS the full name with middle initial and press enter. If a profile doesn't come up, then press Previous account holder? Look up their name, account number, social, or address.

Once the customers needs are determined, search with the most appropriate field.

Start making the profile. The name you typed in on the home page should auto-populate.

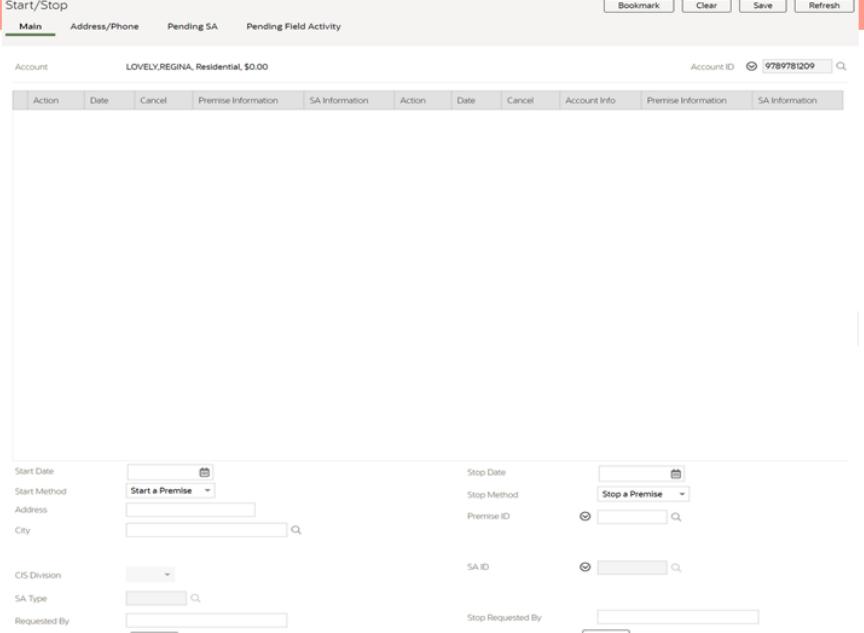
Next, enter the cell phone and email of the account holder. Make sure to click the primary boxes.

Lastly, unclick the "add account and start service" until the customer has agreed to paying the deposit and starting service on a determined date.

Just press save (top right), and you're done!

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After creating the profile, it is time to start the service! Once it brings you to this page, make sure you have another CCS tab open to locate the address where service is being started.



Start/Stop

Main Address/Phone Pending SA Pending Field Activity

Account: LOVELY,REGINA, Residential, \$0.00

Action Date Cancel Premise Information SA Information Action Date Cancel Account Info Premise Information SA Information

Start Date: Start a Premise
Start Method: Start a Premise
Address: _____
City: _____
CIS Division: _____
SA Type: _____
Requested By: _____

Stop Date: Stop a Premise
Stop Method: Stop a Premise
Premise ID: _____
SA ID: _____
Stop Requested By: _____

Start

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Type in the address and search from the CCS home page. Once you enter the address, the addresses profile will come up like this:

Keep this tab open for later!

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Once you are looking over the premise profile, under Premise Investigation look to see what services are provided. At this address there is water (WA) and wastewater (WW). This is important to know for deposit purposes.

If there is reclaim water provided at the premise, it would look like this on the account.

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Deposits

The next step after creating the profile and finding the premise is running the credit check (if requested/consented). If the customer passes the credit check, they will only have to pay the \$25 set-up fee. If they don't pass, depending on the services offered at the premise, this will be what the customer will owe by 5pm to start water services.

\$115

Water (WA) Only
\$90 + \$25 set-up fee

\$190

Wastewater (WW) Only
\$165 + \$25 set-up fee

\$210

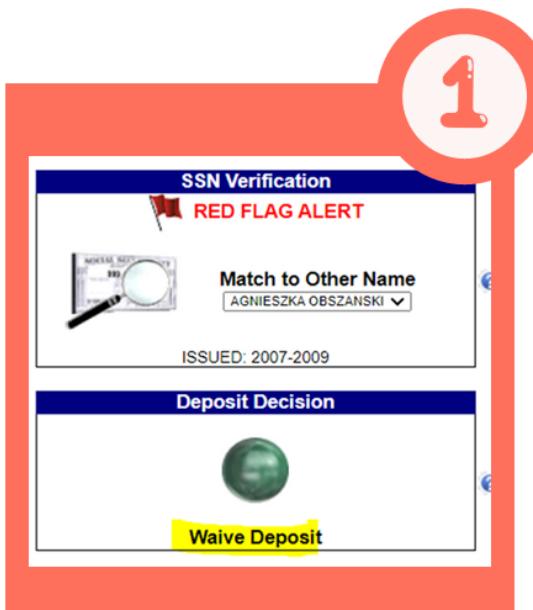
Water and Wastewater
\$185 + \$25 set-up fee

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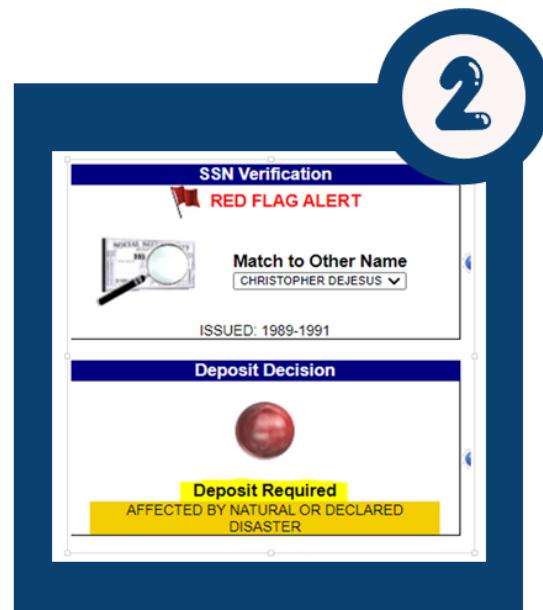
Credit Check

Click the circled link below to pull up the credit check.

Favorite Links	
To Do +	[1]
Customer Contact +	[2]
Pay Plan +	[3]
Online Utility Exchange	[4]
IWR Website	[5]
Water Wastewater Provider	[6]
Property Appraiser Website	[7]
Watering Restrictions	[8]
Solid Waste	[9]
CAMS	



Credit Check Pass



Credit Check Fail

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Start Date

After the credit check, pull back up the first tab you left open.

Choose the **start date**, copy and paste the address and press **enter**.

Enter the “customers name/your initials” in requested by and press **start**.

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As soon as you press start, this “Start SA Confirmation” page will automatically pop up.

Press the “+” button to start the new service agreement.

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**The first SA will be for the
\$25 new service charge.**

For the “Start Option” choose
New Customer-Existing
Premise

Start SA Confirmation - Google Chrome
stg.utilities-cloud.oracleindustry.com/c786p1/test/ccs/web/uiPage/startStopSAsToStartPopupPage?language=ENG&svcName=CILCSSEP&language=ENG

Account ID: 9789781209 LOVELY,REGINA, Residential, \$0.00
Start Requested By: REGINA/AD
Start Date: 05-15-2024

SAs to Start: *3* of *3* +

OS Division: HCWRS SA Type: 1TIME-P
Start Option: NEWCUST
Customer Read: No
Total Amount to Bill:
Recurring Charge Amount:
SIC:
Business Activity:
SA Information:

For the “SA Type” choose 1TIME-P

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Start Requested By: REGINA/AD
Site to Start: *3* of *3* +

OS Division: HCWRS SA Type: 1TIME-P
Start Option: NEWCUST
Customer Read: No
Total Deposit Amount: \$0.00
Recurring Charge Amount:
SIC:
Business Activity:
SA Information:

Start SA

Start Option Search - Google Chrome
stg.utilities-cloud.oracleindustry.com/c786p1/test/ccs/web/uiPage/startStopSAsToStartPopupPage?language=ENG&svcName=CILCSSEP&language=ENG

SA Type Info: HCWRS / Deposit Residential
Analysis Start Option: 05-15-2024
Currency Code: United States Dollars
Start Option Description:

Start Option	Description	Effective Date
DEP_R_W	Deposit Residential Water	01-01-2019
DEP_R_WH	Deposit Residential Water Heater	01-01-2019
DEP_R_W_WHR	Deposit Residential Water / Water Heater	01-01-2019

Press " +" again for the deposit SA

Press “+” again for the deposit SA

(if needed).

Start SA Confirmation - Google Chrome
stg.utilities-cloud.oracleindustry.com/c786p1/test/ccs/web/uiPage/startStopSAsToStartPopupPage?language=ENG&svcName=CILCSSEP&language=ENG

Account ID: 9789781209 LOVELY,REGINA, Residential, \$0.00
Start Requested By: REGINA/AD
Start Date: 05-15-2024

SAs to Start: *3* of *3* +

OS Division: HCWRS SA Type: 1TIME-P
Start Option: DEP_R_W_WHR
Customer Read: No
Total Deposit Amount: \$0.00
Recurring Charge Amount:
SIC:
Business Activity:
SA Information:

Start SA

Depending on what services are available at the premise (and if a deposit is required per the credit check), click the correct deposit.
The amount will auto-populate in “Total Deposit Amount”.

Once selected, press start in the bottom right corner.

Start SA Confirmation - Google Chrome
stg.utilities-cloud.oracleindustry.com/c786p1/test/ccs/web/uiPage/startStopSAsToStartPopupPage?language=ENG&svcName=CILCSSEP&language=ENG

Account ID: 9789781209 LOVELY,REGINA, Residential, \$0.00
Start Requested By: REGINA/AD
Start Date: 05-15-2024

SAs to Start: *3* of *3* +

OS Division: HCWRS SA Type: 1TIME-P
Start Option: DEP_R_W_WHR
Customer Read: No
Total Deposit Amount: \$0.00
Recurring Charge Amount:
SIC:
Business Activity:
SA Information:

Start SA

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This page pops up as soon as you press start on the previous SA Confirmation page.

Take this time to recap the services with the customer.

Repeat the date, the address, and the provided services.

The screenshot shows the HCFL.gov software interface. At the top, there's a navigation bar with 'Start/Stop', 'Main', 'Address/Phone', 'Pending SA', and 'Pending Field Activity'. Below this is a toolbar with 'Bookmark', 'Clear', 'Save', and 'Refresh'. The main area shows an account summary for 'LOVELY,REGINA, Residential, \$0.00' with account ID '9789781209'. A table lists service activities (SA) with columns for Action, Date, Cancel, Premise Information, SA Information, Action, and Date. The table includes rows for 'HCWRS / One Time Premise Charge, Pending', 'HCWRS / Waste Water Residential, WW-MTR, Pending Start', and 'HCWRS / Water Residential, W-MTR, Pending'. On the right side, there are sections for 'Financial Information', 'Current Context' (showing the account details), 'Current To Do' (with an 'Assign me a To Do' button), and 'Favorite Links' (including links to To Do, Customer Contact, Pay Plan, Online Utility Exchange, IWR Website, Water Wastewater Provider, Property Appraiser Website, Watering Restrictions, Solid Waste, CAMS, BI Publisher, and Neptune 360 Portal). A 'Full Context' section also lists the account details. The bottom right corner of the interface has the 'HCFL.gov' logo.

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On the same "Start/Stop" page, click on "Address/Phone".

Check with the customer that this the correct mailing address IF any mail correspondence (i.e. deposit/check refunds) needs to be sent. If they have a different mailing address, change that here.

The screenshot shows the HCFL.gov software interface. The 'Address/Phone' tab is highlighted with a red circle. The page displays mailing address information for account 9789781209. It includes fields for Bill Route Type ('Route via postal service'), Address Source ('Mailing Premise on Account'), Country ('United States of America'), Zipcode ('33596'), Address 1 ('4103 YELLOWWOOD DR'), Address 2 (''), Address 3 (''), City ('VALRICO'), County (''), State ('FL'), and a note about the state ('Florida 33596'). Below this, there's a 'Person Contacts' table with columns for Contact Routing, Person Contact Type, Contact Information, Extension, Format, Primary, and DND Star. It lists an email contact ('reggelovey@aol.com') and a phone contact ('(869) 885-6595'). On the right side, there are sections for 'Financial Information', 'Current Context' (showing the account details), 'Current To Do' (with an 'Assign me a To Do' button), and 'Favorite Links' (including links to To Do, Customer Contact, Pay Plan, Online Utility Exchange, IWR Website, Water Wastewater Provider, Property Appraiser Website, Watering Restrictions, Solid Waste, CAMS, BI Publisher, and Neptune 360 Portal). A 'Full Context' section also lists the account details. The bottom right corner of the interface has the 'HCFL.gov' logo.

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Clicking this will bring you to this

"Account" main page where you

will be checking two things:

1. The CIS Division
2. The Mailing Premise ID

The screenshot shows the HCFL.gov account main page. In the 'Current Context' section, there are three items listed: 'LOVELY,REGINA', '9789781209 1', and '4103 YELLOWWOOD DR, VALRICO, FL, 33596, SFH (Sub MEADOWOOD ESTATES)'. A red arrow points from the text 'Clicking this will bring you to this "Account" main page where you will be checking two things:' to the 'Current Context' section. Two specific fields are circled with black ovals: the 'CIS Division' dropdown set to 'HCWRS' and the 'Mailing Premise ID' field containing '9584020599'.

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Both of
these
should
auto-
populate,
but if it
doesn't...

The screenshot shows the HCFL.gov account main page with several annotations:

- A red circle labeled '1' is placed over the 'CIS Division' dropdown menu, which is currently set to 'Residential'. A text box next to it says: "If the CIS Division doesn't automatically show up, click the down arrow and pick HCWRS".
- A red circle labeled '2' is placed over the 'Mailing Premise ID' field, which contains '9584020599'. A text box next to it says: "If the Mailing Premise ID doesn't automatically show up, click the magnifying glass and it will pull up the address where service is starting".

The right side of the screen shows the standard account details and sidebar.

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Still on the Account page, go to the **Persons** tab.

Look for the **Bill Route Type**, click the drop-down arrow and choose **Route via email**

Account Person ID: 1323024484 Person Name: LOVELY,REGINA, Residential, \$0.00

Bill Route Type: Route via email

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Next, let's leave a comment on the account noting what occurred on the call.

Click **Customer Contact** under **Favorite Links** on the right

Customer Contact Info

User ID: ADORMAN

Contact Date/Time: 05-14-2024 11:59:47AM

Comments

Related Records

Favorite Links

- To Do + [1]
- Customer Contact + [2]
- Pay Plan + [3]
- Online Utility Exchange [4]
- IWR Website [5]
- Water Wastewater Provider [6]
- Property Appraiser Website [7]
- Watering Restrictions [8]
- Solid Waste [9]
- CAMS
- BI Publisher
- Neptune 360 Portal

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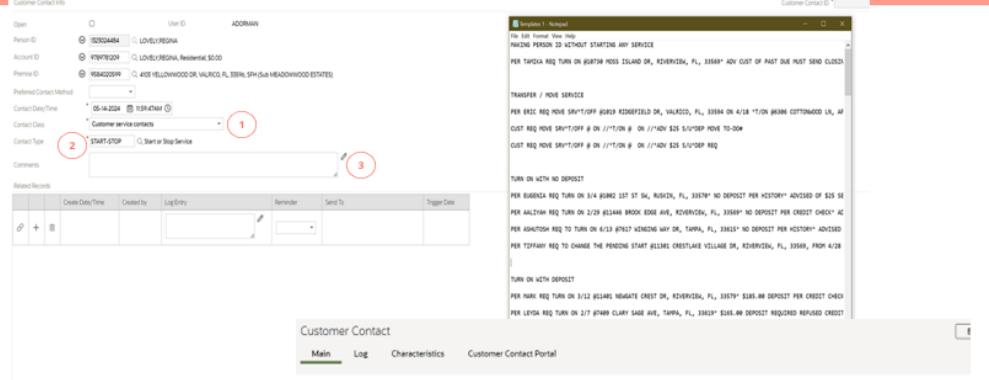
When you get to the Main tab of “Customer Contact” most of the fields will auto-populate.

The ones that won’t need to have these options chosen:

1 Contact Class: Customer Service Contacts

2 Contact Type: START-STOP

3 Comments: From the notes examples, choose the one that is best fitting (you’ll have this to reference separately).



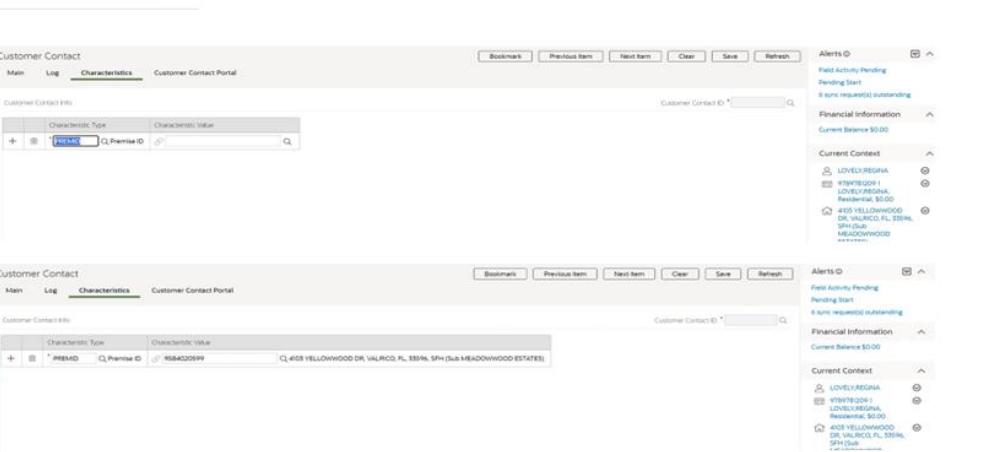
Once you enter your comment press save at the top right.

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The last thing you are doing is entering the **Premise ID**.

You will get this ID number from the Main Customer Contact page.

Just copy and paste into this box on the **Characteristics** tab in Customer Contact!



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By following these steps and diagrams, you should be able to successfully start a service for a customer! This is just the basic example of starting a service with no other circumstances. The next examples will include certain circumstances.

Types of Turn Ons

MATCH WITH MOVE

- PENDING TURN OFF: 11/13
- TURN ON: 11/13
- TODAY'S DATE: 11/13

SAME-DAY TURN ON

- BEFORE COUNTY HOLIDAY OR ON FRIDAYS.
- CUSTOMER CAN'T HAVE ACTIVE SERVICE AT ANOTHER PREMISE.
- NO ACTIVE WATER AT NEW PREMISE.

FUTURE DATE TURN-ON

- PENDING TURN OFF: 11/16
- TURN ON: 11/16
- TODAY'S DATE: 11/13

Past Due Balances

PREMISE WITH PAST DUE

- IS THERE A DEPO THAT COVERS PAST DUE?
- IF YES, START AS NORMAL
 - IF NO, SEE OPTIONS BELOW

- NEW CUSTOMERS: NEED TO PROVIDE LEASING AGREEMENT OR CLOSING PAPERS.
- LANDLORD WITH PREVIOUS SERV: LOCATE ACCOUNT UNDER PREMISE TREE

ACTIVE CUSTOMER WITH PAST DUE

ADDING ADDITIONAL OR TRANSFER SERV

- PAYMENT IS REQUIRED UPFRONT
- CUSTOMER CAN PAY ONLINE DURING CALL OR CALL BACK ONCE PAYMENT HAS BEEN MADE.

Turns On and Turn Off Rules

Turn on rules:

*****We don't offer emergency turn-on*****

MONDAY- FRIDAY: with at least a 24-business hour notice, but no more than 30 days in advance.

- No ETA will be provided. The service request will be completed next business day between 9-5 pm.

DAY BEFORE A HOLIDAY: only if the new premise has no active services and the customer does not have active service at another premise with Hillsborough County. (fees apply/ see new service request)

SAME DAY ONLY ON FRIDAYS: only if the new premise has no active services and the customer does not have active service at another premise with Hillsborough County. (fees apply/ see new service request)

- If it is after 4 pm you must get approval from your Analyst to complete the same-day turn-on and contact the field dispatch supervisor and send an email.
- COT sewer-only premise will be set up for the next available business day.
- No meter at premise will be set up for the next avail business day.

Limited to field service availability:

2ND TRIP WRI (water running inside)- same-day. Send an email to field service dispatcher.

3RD TRIP WRI (water running inside)- same-day, but someone will have to be home, and there is a \$15 fee.

Turn off rules:

MONDAY -THURSDAY- with at least a 24-business hour notice, but no more than 30 days in advance.

- No turn-off on Fridays or weekends.
- Never the day before or on a holiday.

EMERGENCY TURN-OFF: same-day turn-off services for leaks. A \$30 emergency fee will be billed.

Same Day Service Request

NOTE: If the Dispatcher identifies a new Field Activity and they did not receive a call or email from you, they will determine if it is possible to be worked on the scheduled date and, if not, they will reschedule it for the next working day.

CALLING THE DISPATCHER / SAME-DAY

If you create a "Same Day" Field Activity that needs to be worked on the day you are creating it, **you must email and call the appropriate Dispatcher (North or South)** to advise them that the FA has been created.

- Emergency turn off
- Water running inside 2nd and 3rd trip
- Active account no water
- Turn-on meter after an emergency turn-off or turn-off for customer repairs

If a dispatched Field Activity is canceled and replaced with another Field Activity for the same day, you must email the appropriate Dispatcher to tell them that the Field Activity you just created replaced one that you canceled.

- Example:
Match with a
move

Chapas, Jason 12:39 PM

CALLING THE DISPATCHER / SAME DAY

There should be no same day turn-ons after 4:30pm. If you need a "Same Day" Turn On (AFTER 4:30PM) you must first get Manager's approval and then call the (AFTER 3:30PM) Dispatcher before creating the FTT to plan for Field Service or After Hours Services to handle the turn on requirement. Any calls after 5:00PM should go to afterhours immediately.

If a Dispatched Field Activity is canceled and replaced with another Field Activity for the same day, you should email the Dispatchers to inform them that the Field Activity you created is replacing the one that you canceled.

We ask that a call is made specifically after 3:30pm.

Friday same-day turn-on for new customers or severance reconnects don't require an email or call unless it's past 4 pm

- After 4:30 pm, requires manager's approval, and call/email dispatch supervisor.

Start Service for Previous Customer No Deposit

Qualifications to waive deposit for a deposit customer:

- 2 years of active services.
- Last 12 months: All payments were made on time.

Active accounts:

- If less than 2 years of history, then stop here deposit will be required for additional service or transfers beyond the 2 week window.
- 2 years or more, review payment history.

Locate the SA Premise list and look for the active deposit date

SA Premise List			
PREMISE	CURRENT BALANCE	PAYOUT BALANCE	SA INFORMATION
513 ROOKS RD, SEFFNER, FL, 33584, SFH (Sub SHANGRI LA & SUBURBAN P)	\$0.00	\$-180.00	HCWRS / Deposit Residential, Active, 07-25-2016,, 3057666013
513 ROOKS RD, SEFFNER, FL, 33584, SFH (Sub SHANGRI LA & SUBURBAN P)	\$0.00	\$0.00	HCWRS / Water Residential, W-MTR, Active, 10-05-2017, 3057666173

Customer Information (Map Zone)	
ACCOUNT ID	305766741
MAIN CUSTOMER	DAVIS,AARON L - Home Phone:[501] 249-1519
SET UP DATE	07-22-2016
CIS DIVISION	HCWRS
CUSTOMER CLASS	Residential
BILL CYCLE	Bill Cycle - 10
CURRENT CREDIT RATING	695
NEXT CREDIT REVIEW DATE	07-14-2017
CELL PHONE	(501) 818-9445
SOCIAL SECURITY	*****2462
EMAIL ADDRESS	aarondavis0511@gmail.com

Under Customer information locate the "current credit rating"

○ 0 to 999 means late payments were applied to the account, the deposit is required.

- 1000 credit rating is perfect payment history for the last 12 months, so the deposit can be waived.

Customer Information (Map Zone)	
ACCOUNT ID	2329959566
MAIN CUSTOMER	TAYLOR,ALBERT
SET UP DATE	08-13-2021
CIS DIVISION	HCWRS
CUSTOMER CLASS	Residential
BILL CYCLE	Bill Cycle - 06
CURRENT CREDIT RATING	1000
NEXT CREDIT REVIEW DATE	08-01-2022
ALTERNATE PAY SOURCE	Hillsborough - AP - Checking
CELL PHONE	(813) 789-2636
SOCIAL SECURITY	*****0258
EMAIL ADDRESS	DT313424@GMAIL.COM

A different way to access the payment history:

Click on the account folder

The screenshot shows a 'Current Context' window with the following items:

- TAYLOR,ALBERT (with a person icon)
- 2329959566 2 TAYLOR,ALBERT, Residential, \$140.62 (with a document icon, circled in orange)
- 953 SYMPHONY ISLES BLVD, APOLLO BEACH, FL, 33572, SFH (Sub APOLLO BEACH SYMPHONY I) (with a house icon)

Click on the C&C tab and locate the "current credit rating"

The screenshot shows the 'Account' screen with the 'C & C' tab selected. The 'CURRENT CREDIT RATING' field is highlighted with a blue arrow pointing to it. Other tabs visible include Main, Auto Pay, Persons, Financial Balances, Bill Messages, Budget, Deposits, and Character.

ACCOUNT: TAYLOR,ALBERT, Residential, \$140.62
ACCOUNT ID: 2329959566

COLLECTION CLASS: Commercial

POSTPONE CREDIT REVIEW UNTIL: 1000

CURRENT CREDIT RATING: 1000

CREDIT RATING HISTORY: New

START DATE: [empty]

END DATE: [empty]

AFFECT CREDIT RATING BY: [empty]

AFFECT CASH-ONLY SCORE BY: [empty]

COMMENTS: [empty]

Start Service for Previous Customer with Deposit

When a customer leaves our service area and then moves back, their account will be accessible as long as it was within the time frame that CCS has been in place. The most important thing to do in this situation is review the account history. Pull up their account and view their financial history to determine if a deposit is needed.

Here are some important things to remember:

- Credit checks can only happen once for every customer. If they passed the credit check originally, that pass still carries over, making them a non-deposit customer **IF** their payment history fits the requirements (below).
- If their account was open for less than 2 years, or they had any late/NSF payments within the last 12 months of the account, a deposit will be required.
- If they didn't pass the credit check before, they don't get another chance to run it, so they will stay a deposit customer.
- Customers are able to request their deposit to be refunded to them once they have two years of service and 12 months of on-time, uninterrupted payments. It must be requested though, as it is not automatic.
- If they don't request their deposit refund, the deposit will be applied to their final bill, and the remainder, if any, will be sent via postal mail to their updated mailing address (UMA) in the form of a check.

Click on **Current Balance** in the financial information dashboard.

The screenshot shows a section titled "Financial Information". It displays the following information:

- Current Balance \$0.00 (highlighted with an orange oval)
- Last Payment 03-14-2019, \$123.99
- Last Billed 04-01-2019, \$0.00, Due Date 04-22-2019
- Previous Bill 03-21-2019, \$55.25
- Next Bill Date 08-01-2022

Use the date of the final bill as your start point of service time frame.
This will also be the place to look for payment issues.

The screenshot shows the "Account Financial History" page. The "Main" tab is selected. At the top, it displays "ACCOUNT INFO" with the name "SMITH,ADAM, Residential, \$0.00" and "ACCOUNT ID" with the value "2878009640". Below this is a table of financial transactions:

ARREARS DATE	FINANCIAL TRANSACTION TYPE	CURRENT AMOUNT	CURRENT BALANCE	PAYOUT AMOUNT	PAYOUT BALAN
04-01-2019	Refund Credit Balance via A/P	\$55.95	\$0.00	\$55.95	
04-01-2019	Balance Transfer	\$0.00	\$-55.95	\$0.00	
04-01-2019	Bill Segment	\$23.71	\$-55.95	\$23.71	
04-01-2019	Deposit Refund Sync (cur=pay)	\$-120.00	\$-79.66	\$0.00	
04-01-2019	Interest Earnings	\$-14.91	\$40.34	\$-14.91	
03-21-2019	Bill Segment	\$55.25	\$55.25	\$55.25	
03-21-2019	Collection Notice Fee	\$10.00	\$0.00	\$10.00	

Scroll down to the bottom see if the customer had services for at least 2 years:

A screenshot of a table row from the financial history. The first column, which contains the date "01-27-2019", is highlighted with an orange oval.

01-27-2019	Conversion Only - Set Balance	\$44.66	\$44.66	\$-75.34
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Transfer Service with a Deposit

When a customer wants to transfer their water service to a new address (moving), they have the ability to move their deposit with them.

There are a few things to consider though:

- If they are moving within 2 weeks, the deposit can be transferred to the new address.
- If it will be **more** than 2 weeks and they are a deposit customer, a deposit on the new address will be required. The previous deposit will be applied to the account as a credit once it processes.
- To transfer this deposit, you will need to enter a **To-Do** for Accounting (see below)

To Do Entry

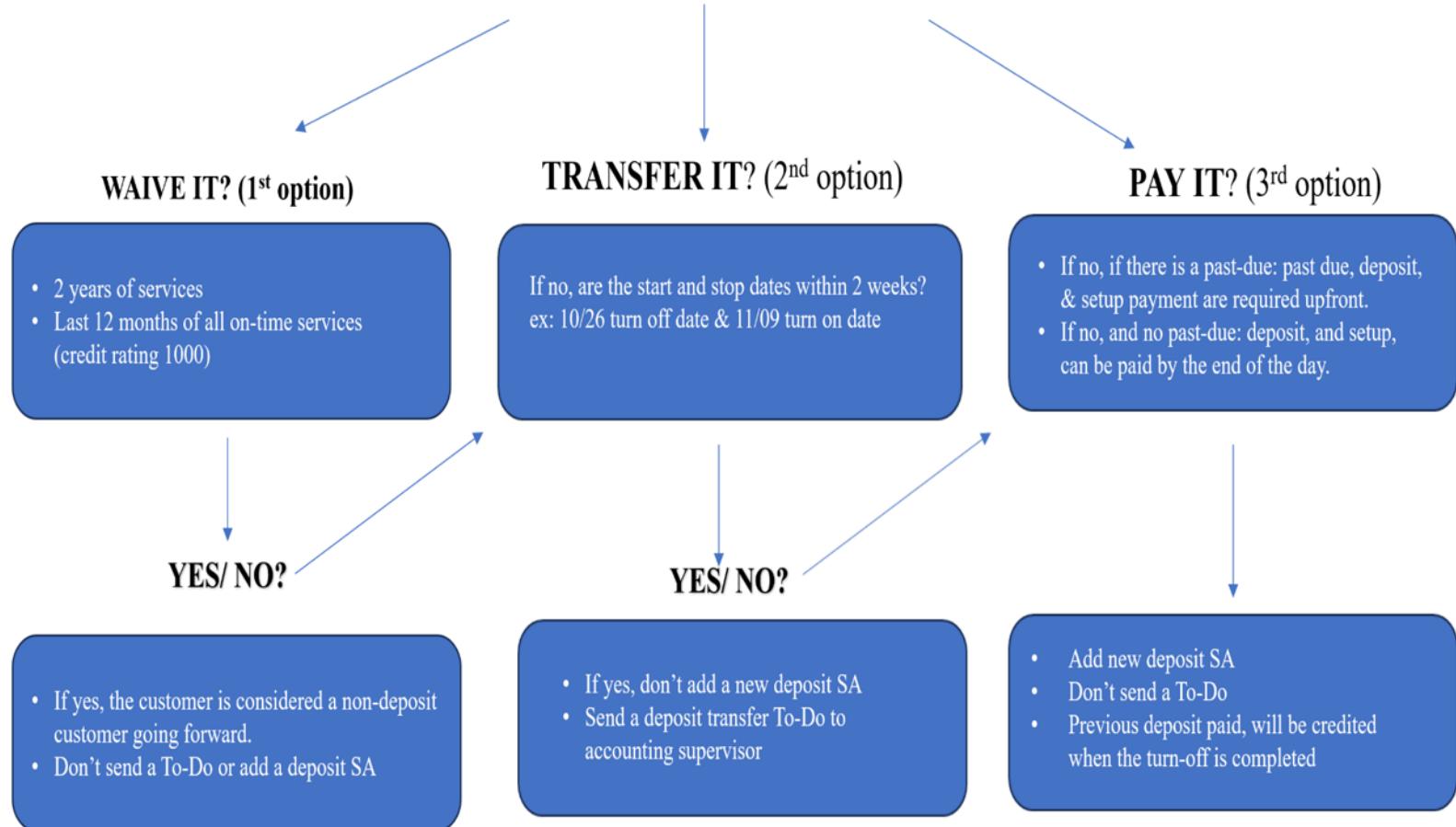
Main ⓘ

To Do Type	Manual To Do Entry * ACCT#4127586992 / DEPOSIT TRANSFER
Subject	
Comments	TRANSFER DEPO FROM 1706 REDMOND BROOK LN TO 712 OCEAN SPRAY DR
To Do Type Priority	Priority 10 -- Highest
Override Priority	
Send To	Role ▾
Role	Accounting Supervisor ▾

Characteristics

	Characteristic Type	Sequence	Characteristic Value
+	Account		4127586992

TRANSFER SERV: CUSTOMER WITH DEPOSIT



Transfer Service without a Deposit

If the customer was originally a deposit customer, but they have achieved the requirement of 2 years of service and the last 12 months of on-time, uninterrupted payments, they will not need a deposit for the new address. Their previous deposit can be applied to their account as a credit. At that point, they would only need to pay the \$25 set-up fee for the new address. Let's view the example below:

SA Premise List

Premise	Current Balance	Payoff Balance	SA Information
13701 SUN CT, TAMPA, FL, 33624, SFH (Sub CARROLLWOOD VILLAGE 2 & 3)	\$67.63	\$67.63	HCWRS / Waste Water Residential, WW-MTR, Stopped, 06-09-2021 - 06-21-2024, 5892522001
13701 SUN CT, TAMPA, FL, 33624, SFH (Sub CARROLLWOOD VILLAGE 2 & 3)	\$54.84	\$54.84	HCWRS / Water Residential, W-MTR, Stopped, 06-09-2021 - 06-21-2024, 5896888121
13701 SUN CT, TAMPA, FL, 33624, SFH (Sub CARROLLWOOD VILLAGE 2 & 3)	\$0.00	\$-180.00	HCWRS / Deposit Residential, Active, 01-07-2021, Deposit Residential Water / Waste Water, 5899327930
9604 WEST PARK VILLAGE DR, TAMPA, FL, 33626, SFH (Sub WESTCHASE SECTION 324)	\$29.26	\$29.26	HCWRS / Waste Water Residential, WW-MTR, Active, 05-17-2024, 5890521644
9604 WEST PARK VILLAGE DR, TAMPA, FL, 33626, SFH (Sub WESTCHASE SECTION 324)	\$24.09	\$24.09	HCWRS / Water Residential, W-MTR, Active, 05-17-2024, 5891591599
9604 WEST PARK VILLAGE DR, TAMPA, FL, 33626, SFH (Sub WESTCHASE SECTION 324)	\$25.00	\$25.00	HCWRS / One Time Premise Charge, Stopped, 05-17-2024 - 05-17-2024, New Customer - Existing Premise, 5894549292
9604 WEST PARK VILLAGE DR, TAMPA, FL, 33626, SFH (Sub WESTCHASE SECTION 324)	\$9.00	\$9.00	HCWRS / Reclaimed Water Residential -, RW-FLAT, Active, 05-17-2024, 5899382160

As you can see, this customer started service at 13701 Sun Ct. on 01-07-2021 (over 2 years ago) and paid a \$180 deposit. That covers the first qualification.

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance
1	06-14-2024	Bill Segment	\$184.82	\$209.82	\$184.82	\$29.82
2	06-14-2024	Customer Service Setup Fee	\$25.00	\$25.00	\$25.00	\$-155.00
3	05-13-2024	Pay Segment	\$-128.71	\$0.00	\$-128.71	\$-180.00
4	05-02-2024	Bill Segment	\$128.71	\$128.71	\$128.71	\$-51.29
5	04-11-2024	Pay Segment	\$-113.67	\$0.00	\$-113.67	\$-180.00
6	04-02-2024	Bill Segment	\$113.67	\$113.67	\$113.67	\$-66.33
7	03-13-2024	Pay Segment	\$-108.95	\$0.00	\$-108.95	\$-180.00
8	03-04-2024	Bill Segment	\$108.95	\$108.95	\$108.95	\$-71.05
9	02-13-2024	Pay Segment	\$-100.71	\$0.00	\$-100.71	\$-180.00
10	02-02-2024	Bill Segment	\$100.71	\$100.71	\$100.71	\$-79.29
11	01-12-2024	Pay Segment	\$-108.95	\$0.00	\$-108.95	\$-180.00
12	01-03-2024	Bill Segment	\$108.95	\$108.95	\$108.95	\$-71.05
13	12-12-2023	Pay Segment	\$-120.72	\$0.00	\$-120.72	\$-180.00
14	12-01-2023	Bill Segment	\$120.72	\$120.72	\$120.72	\$-59.28
15	11-13-2023	Pay Segment	\$-125.22	\$0.00	\$-125.22	\$-180.00
16	11-01-2023	Bill Segment	\$125.22	\$125.22	\$125.22	\$-54.78
17	10-13-2023	Pay Segment	\$-104.61	\$0.00	\$-104.61	\$-180.00
18	10-03-2023	Bill Segment	\$104.61	\$104.61	\$104.61	\$-75.39
19	09-13-2023	Pay Segment	\$-121.36	\$0.00	\$-121.36	\$-180.00
20	09-01-2023	Bill Segment	\$121.36	\$121.36	\$121.36	\$-58.64
21	08-11-2023	Pay Segment	\$-135.16	\$0.00	\$-135.16	\$-180.00
22	08-02-2023	Bill Segment	\$135.16	\$135.16	\$135.16	\$-44.84
23	07-13-2023	Pay Segment	\$-140.13	\$0.00	\$-140.13	\$-180.00
24	07-03-2023	Bill Segment	\$140.13	\$140.13	\$140.13	\$-39.87
25	06-13-2023	Pay Segment	\$-188.36	\$0.00	\$-188.36	\$-180.00

Then, after reviewing their payment history, in the last 12 months (6/14/2023-6/14/2024) there were no late or NSF payments on the account. This meets **both** of the requirements to have the deposit credited to the account and applied to the bill. The next page will demonstrate how to enter a “To Do” to have the deposit credited to the account.

To-Do: Transfer Deposit

The screenshot shows a web-based application window titled "Add To Do Entry - Google Chrome". The URL is "utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG...". The form contains the following fields:

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest
OVERRIDE PRIORITY	*		
SUBJECT	ACCOUNT#0025490345/DEPOSIT CREDIT		
COMMENT	PLEASE CREDIT DEPOSIT TO THE ACCOUNT* CUST MEETS REQ FOR NO DEPOSIT		
SEND TO	Role		
ROLE	C&C	Credit and Collections	

Below these fields is a section labeled "CHARACTERISTICS" containing a table:

		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE
CHARACTERISTICS	+	C1-ACCT	0025490345

At the bottom right of the dialog are "OK" and "Cancel" buttons.

As previously mentioned, a **To Do** will need to be added to the account for Credit Management to allow the credit to be applied. The **To Do** will need to be entered exactly as seen above.

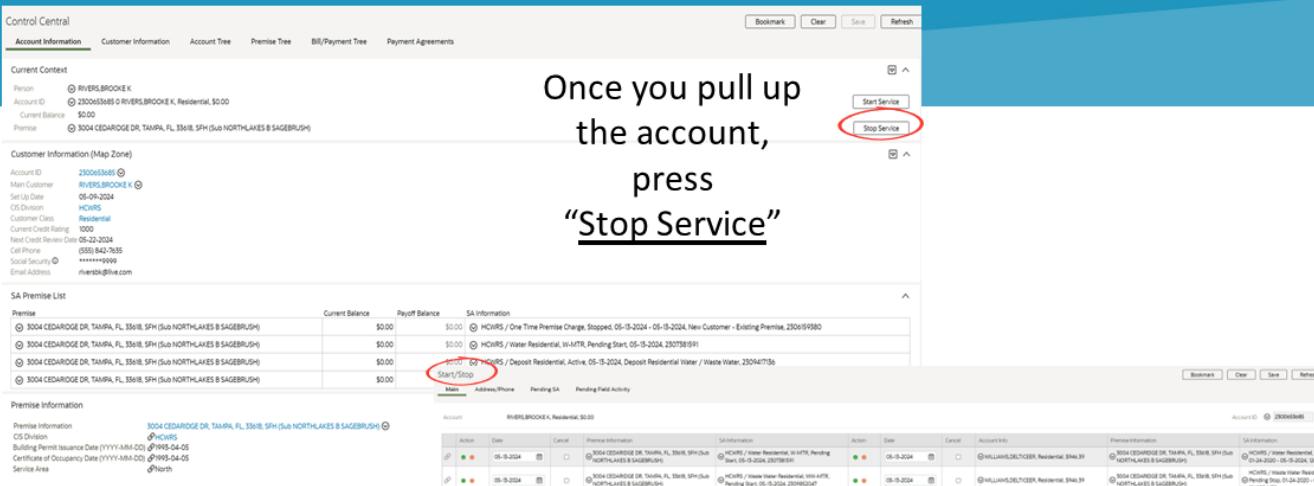
Stopping Service

Stopping service at a premise is one of the quickest procedures you as a CSR will have to perform.

- 1 To start the process, you will need to ask the customer for the address they are stopping service at.
- 2 Type in the address and pull it up in CCS.
- 3 Like normal, confirm the name, phone number, email, and last 4 of the social.

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Once you pull up
the account,
press
“Stop Service”



The screenshot shows the HCFL.gov Control Central interface. In the center, there is a large text box with the instructions: "Once you pull up the account, press “Stop Service”". Above this text box, the "Stop Service" button is circled in red. Below the text box, there is a table titled "SA Premise List" showing several premises. One row in the table has the "Start/Stop" button circled in red. At the bottom of the page, there is another table with several rows, some of which also have the "Start/Stop" button circled in red.

Clicking that will pull up the “Start/Stop” page.

This is where you will enter the stop information



The screenshot shows the "Start/Stop" page. It has two main sections: "Start a Premise" on the left and "Stop a Premise" on the right. Both sections have "Start" and "Stop" buttons. The "Stop" button in the "Stop a Premise" section is circled in red. There are also other input fields and dropdown menus for Start Date, Start Method, Address, City, SA Division, SA Type, and Requested By.

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Start/Stop

Main Address/Phone Pending SA Pending Field Activity

Account RIVERS.BROOK K, Residential, \$0.00

Bill Route Type Route via email

Address Source Mailing Premise on Account

Country United States of America

Zipcode 33618

Address 1 3004 CEDARIDGE DR

Address 2

Address 3

City TAMPA

County

State FL Q 33618

Person Contacts

	Contact Routing	Person Contact Type	Contact Information
+	Email	Primary Email	riversbk@live.com
+	Phone	Cell Phone	(555) 842-7635

While still on the Start/Stop page, click on “Address/Phone” to update the mailing address for the final bill. This is also important because if the customer is owed any of their deposit, it can only be sent through the mail. If the customer is hesitant to give their new address, just make them aware of that (if applicable).

Click the drop-down **Address Source** menu and choose “Account Override”. This will clear out the current address in preparation for the new mailing address.

Start/Stop

Main Address/Phone Pending SA Pending Field Activity

Account RIVERS.BROOK K, Residential, \$0.00

Bill Route Type Route via email

Address Source Mailing Premise on Account

Country United States of America

Zipcode

Address 1 3004 CEDARIDGE DR

Address 2

Address 3

City TAMPA

County

State FL Q Florida 33618

Person Contacts

	Contact Routing	Person Contact Type	Contact Information
+	Email	Primary Email	riversbk@live.com
+	Phone	Cell Phone	(555) 842-7635

Start/Stop

Main Address/Phone Pending SA Pending Field Activity

Account RIVERS.BROOK K, Residential, \$0.00

Bill Route Type Route via email

Address Source Account Override

Country United States of America

Zipcode

Address 1

Address 2

Address 3

City

County

State

Validate

Person Contacts

	Contact Routing	Person Contact Type	Contact Information
+	Email	Primary Email	riversbk@live.com
+	Phone	Cell Phone	(555) 842-7635

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Stop Date 05-23-2024 Enter the requested stop date

Stop Method Stop a Premise

Premise ID 9695300685 The Premise ID and Address should auto-populate
3004 CEDARIDGE DR, TAMPA, FL, 33618, SFH (Sub NORTHLAKES B SAGEBRUSH)

SA ID

Stop Requested By BROOKE/AD Enter the customers name/your initials

Stop Press “Stop” once complete

Start/Stop

Main Address/Phone Pending SA Pending Field Activity

Account RIVERS.BROOK K, Residential, \$0.00

Bookmark Clear Save Refresh

Account ID 2300653685

Action	Date	Cancel	Premise Information	SA Information	Action	Date	Cancel	Account Info	Premise Information	SA Information
<input checked="" type="checkbox"/>	05-15-2024	<input type="checkbox"/>	3004 CEDARIDGE DR, TAMPA, FL, 33618, SFH (Sub NORTHLAKES B SAGEBRUSH)	HCWRS / Water Residential, W-MTR, Pending Start, 05-15-2024 - 05-23-2024, 2309852047	<input checked="" type="checkbox"/>	05-15-2024	<input type="checkbox"/>	WILLIAMS.DELTICEER, Residential, \$946.39	3004 CEDARIDGE DR, TAMPA, FL, 33618, SFH (Sub NORTHLAKES B SAGEBRUSH)	HCWRS / Water Residential, W-01-24-2020 - 05-15-2024, 2309852047
<input checked="" type="checkbox"/>	05-15-2024	<input type="checkbox"/>	3004 CEDARIDGE DR, TAMPA, FL, 33618, SFH (Sub NORTHLAKES B SAGEBRUSH)	HCWRS / Waste Water Residential, WW-MTR, Pending Start, 05-15-2024 - 05-23-2024, 2309852047	<input checked="" type="checkbox"/>	05-15-2024	<input type="checkbox"/>	WILLIAMS.DELTICEER, Residential, \$946.39	3004 CEDARIDGE DR, TAMPA, FL, 33618, SFH (Sub NORTHLAKES B SAGEBRUSH)	HCWRS / Waste Water Residential Pending Stop, 01-24-2020 - 05-16-2024, 2309852047

Now, the “Main” tab of the Start/Stop page will come up, and it will show the stop date you just entered, following the original start date.

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USPS.COM Quick Tools Send Receive Shop Business International Help

Look Up a ZIP Code™ ZIP Code™ by Address ZIP Code™ by City and State Cities by ZIP Code™ FAQs >

ZIP Code™ by Address

Enter a street address along with city and state OR enter a street address and ZIP Code™. ⓘ

Indicate a required field.

Company

*Street Address Apt/Unit/Other

City BRANDON State FL - Florida

ZIP Code™ 33510

Find 

In another window, pull up the USPS website to verify the address.

<https://tools.usps.com/zip-code-lookup.htm?byaddress>

This step is to ensure the accuracy of the new address and limit mistakes. Enter the new provided address and press “Find”.

USPS.COM Quick Tools Send Receive Shop Business International

Look Up a ZIP Code™ ZIP Code™ by Address ZIP Code™ by City and State Cities by ZIP Code™ Fi

ZIP Code™ by Address

You entered:
1902 SEAN WOOD CIRCLE
BRANDON FL
33510

If more than one address matches the information provided, try narrowing your search by entering a street address and, if applicable, a unit number. [Edit and search again](#).

1902 SEAN WOOD CIR
BRANDON FL 33510-2716

[Look Up Another ZIP Code™](#) [Edit and Search Again](#)

The next page will provide you with the official address used by the USPS. This what you will enter in CCS.



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Start/Stop

Main Address/Phone Pending SA Pending Field Activity

Bookmark Clear Save Refresh 

Account RIVERS,BROOKE K, Residential, \$0.00 Account ID 2300653685 Q

Bill Route Type Route via email

Address Source Account Override

Country United States of America

Zipcode 33510 Zip code only gets the first part, not the second part after the “-”.

Address 1 1902 SEAN WOOD CIRCLE

Address 2

Address 3

City BRANDON

County HILLSBOROUGH

State FL Q Florida 33510

Validate

Enter the address in the correct format, and press “Save” at the top right.

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Lastly, you need to note the account.

On the far-right hand side, click **Customer Contact**

Make sure the necessary information is entered, leave the comment, press **“Save”**, and you've officially stopped a service!

Pending Start/Stop Error

Pending Start Error (supposed to have started 3/04, still in progress 7/17. This was preventing bills from being generated.)

Service Agreements

Event Type	Service Agreement ID	Usage Subscription
Start Service	5083599251	SANTIGO,ERIC / Home Phone (941) 730-5922 / Water - Re

Activity Hierarchy

- ▼ [File] Enable Service Type / 6809 MARY LOU DR, RIVERVIEW, FL, 33578, USA / 03-01-2024 1:50:34PM / 03-04-2024 12:00:00AM EST / / Activity in Progress
- ▼ [File] Field Activity / Line Maintenance Unlock & Turn-On Service / Customer to Meter / 5784888395 / Communication In Progress / Create Date Time: 04-09-2024 6:03:08PM
- [File] Field Activity Outbound Communication / Outbound / Response Error / 04-09-2024 6:03:08PM

Pending Stop Error

The screenshot shows the Control Central application interface. The main window displays account information for person ARMSTRONG,LIONEL, account ID 0441399115. The account has a current balance of \$108.88 and a payoff balance of \$76.12. The premise is listed as 147 NW 18TH ST, RUSKIN, FL, 33570, SFH (Sub RUSKIN). The 'Customer Information' section shows details like bill cycle 02, next credit review date 07-24-2024, and social security number ****6741. The 'SA Premise List' section shows three premises, all of which are pending stops. The 'Current Context' sidebar shows the account context and a 'Pending Stop' alert. The 'Financial Information' sidebar shows the current balance and payoff balance. The bottom status bar indicates the time is 8:55 AM on 7/17/2024.

When you come across either of these issues, just drop the account number and a screenshot of the issue into the CCS Training and Support teams chat so that it can be looked into for a solution.

Adding an Authorized User

An **Authorized** Person can stop/start or transfer service. They can also make a payment arrangement and apply for a leak adjustment. To make financial decisions for the account they must be Authorized.

Someone who is **not authorized** on the account can still make inquiries as to usage, possible leaks, and balance due. They cannot make any financial arrangements or decisions for the account. They cannot stop/start or transfer a service that is in another person's name.

*In the case where a customer is deceased the next of kin may request a turn-off.

- However, if they wish to put it in their name you would follow the Name Change Procedure and they would need a copy of the Death Certificate.

**They may also ask for a plumbing turn-off in cases where there is an emergency just like we would take from a neighbor or passer-by.*

To add an authorized user to an account, they will need their own profile (person ID).

On the search page of CCS, search the desired authorized user by first and last name to ensure they don't already have an account or profile. Once you type in LAST NAME,FIRST NAME press enter. If nothing comes up, ask them what their MIDDLE INITIAL is, add it to the search, and press enter again. If nothing comes up, they don't have account or profile, so create a new account for them.

Control Central Search

Main

Control Central Search ⓘ

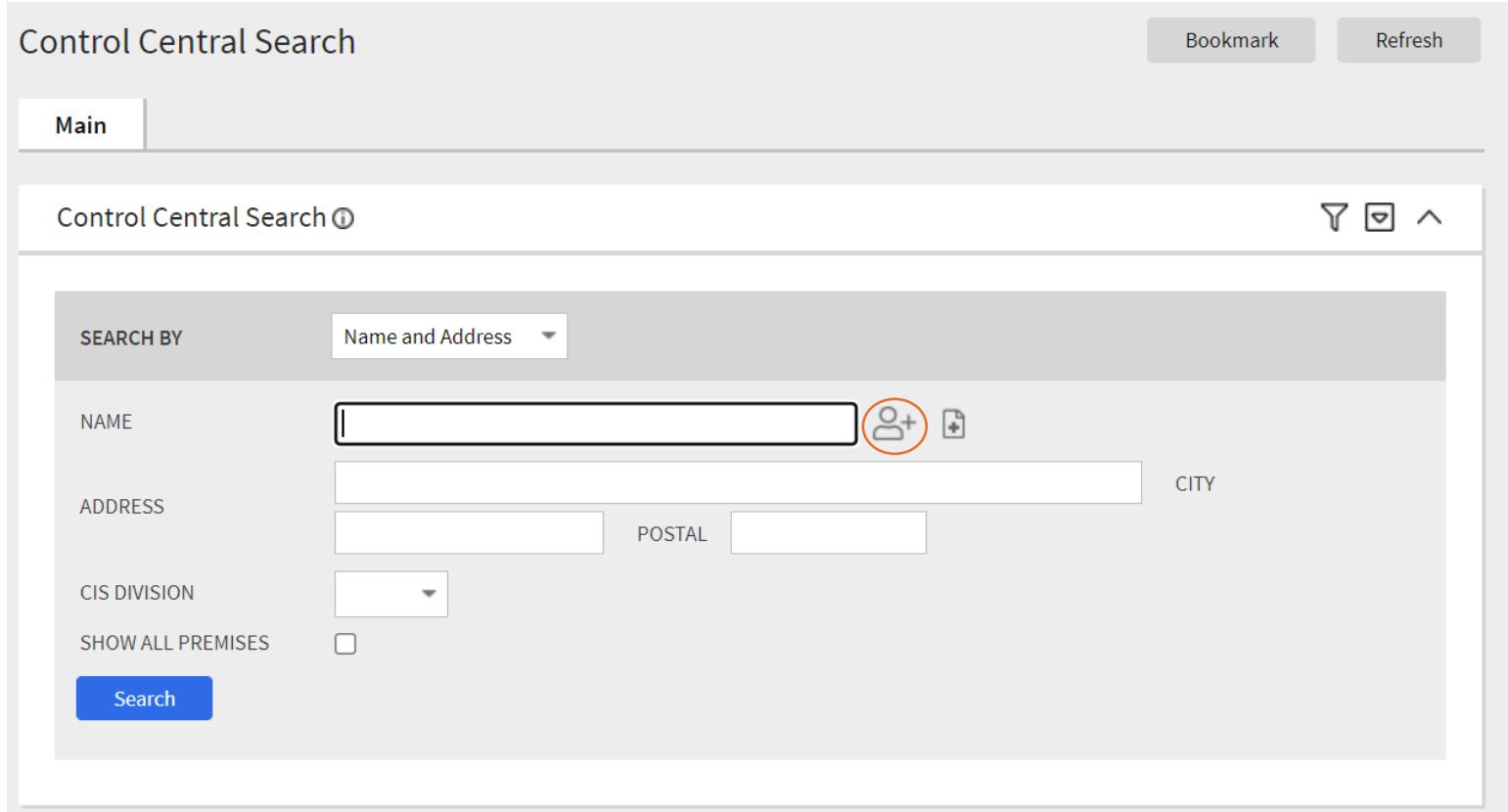
SEARCH BY Name and Address ▾

NAME  

ADDRESS CITY

CIS DIVISION

SHOW ALL PREMISES



Like normal, type in the customers primary phone, email, and full social security number. Make sure to **uncheck** the “ADD ACCOUNT AND START SERVICE” box in the bottom left.

Person

Bookmark Delete Clear Save Refresh

PERSON INFORMATION DOE,KATE PERSON ID 5997974487

PERSON/BUSINESS Person LIFE SUPPORT / SENSITIVE LOAD None LIFE SUPPORT / SENSITIVE LOAD NOTES

	NAME TYPE	PERSON NAME	DO NOT FORMAT
<input type="button" value="+"/>	Primary	DOE,KATE	<input type="checkbox"/>

PERSON NAMES

PERSON CONTACTS

	CONTACT ROUTING	PERSON CONTACT TYPE	CONTACT INFORMATION	EXTENSION	FORMAT	PRIMARY	DO NOT DISTURB (FROM)	DO NOT DISTURB (TO)
<input type="button" value="+"/>	Email	Primary Email	kate@aol.com			<input checked="" type="checkbox"/>		
<input type="button" value="+"/>	Phone	Cell Phone	(812) 123-4567		(999) 999-9999	<input checked="" type="checkbox"/>		

PERSON IDs

	PRIMARY ID	ID TYPE	ID NUMBER	IDENTIFIER FORMAT
<input type="button" value="+"/>	<input checked="" type="checkbox"/>	Social security number	*****6789	999-99-9999

ADD ACCOUNT AND START SERVICE CUSTOMER CLASS This person has 1 account(s).

Once you press save, the person ID will come up in the top right. Copy the number.

Person

Bookmark Delete Clear Save Refresh

PERSON INFORMATION DOE,KATE PERSON ID 5997974487

Go back to the original customers account who wanted to add this authorized user. Once you pull up their account, click the account hyperlink (in the orange circle below).

Current Context

- BROWN,CAROLYN - Home Phone: (813) 562-0581
- 0031678135 0 BROWN,CAROLYN, Residential, \$0.00
- 11742 ALBATROSS LN, RIVERVIEW, FL, 33569, SFH (Sub ESTUARY PHASE 5)

Once on the account page, go to the “Persons” tab. This first page is the account holders.

Account

Main Auto Pay **Persons** Financial Balances Bill Messages C & C Budget Deposits Characteristics Alerts Acco ▶

ACCOUNT BROWN,CAROLYN, Residential, \$112.36 ACCOUNT ID 0031678135 0

ACCOUNT PERSONS "1" of "1" +

PERSON ID	<input type="text" value="0082867436"/>	BROWN,CAROLYN - Home Phone:(813) 562-0581
MAIN CUSTOMER	<input checked="" type="checkbox"/>	PREFIX/SUFFIX <input type="text"/>
FINANCIALLY RESPONSIBLE	<input checked="" type="checkbox"/>	PFX/SFX NAME <input type="text"/>
THIRD PARTY GUARANTOR	<input type="checkbox"/>	
RELATIONSHIP TYPE	<input type="button" value="Main customer"/>	

BILL ROUTING INFORMATION

RECEIVES COPY OF BILL	<input checked="" type="checkbox"/>	BILL ROUTE TYPE <input type="button" value="Route via email"/>
BILL FORMAT	<input type="button" value="Detailed"/>	NUMBER OF BILL COPIES <input type="text" value="1"/> CUSTOMER PO ID <input type="text"/>

QUOTE ROUTING INFORMATION

RECEIVES COPY OF QUOTE	<input type="checkbox"/>	QUOTE ROUTE TYPE <input type="button"/>
------------------------	--------------------------	---

COLLECTION/OVERDUE INFORMATION

RECEIVES COLLECTION AND OVERDUE NOTICES	<input checked="" type="checkbox"/>
---	-------------------------------------

ADDRESS INFORMATION

ADDRESS SOURCE	<input type="button" value="Account Override"/>
----------------	---

Press the + sign, paste the Person ID and press enter. Next click the box that says financially responsible, choose the relationship and press save. Keep in mind, the only relationship type that shows on the account page is those in the “Spouse” category.

The screenshot shows the 'Account Persons' section of a software application. At the top, there are tabs for Main, Auto Pay, Persons, Financial Balances, Bill Messages, C & C, Budget, Deposits, Characteristics, Alerts, and Accol. Below the tabs, the account details are shown: ACCOUNT - BROWN,CAROLYN, Residential, \$112.36 and ACCOUNT ID - 0031678135. The 'PERSONS' tab is selected. The 'PERSON ID' field contains '5997974487' and has a circled orange border. The 'RELATIONSHIP TYPE' dropdown menu is open, showing 'Family member' as the selected option, also with a circled orange border. Other fields visible include 'MAIN CUSTOMER' (unchecked), 'FINANCIALLY RESPONSIBLE' (checked), and 'THIRD PARTY GUARANTOR' (unchecked).

The customer can request to have miscellaneous persons added to their account for purposes of acting on their behalf. SSN is required at the time of set-up; otherwise, follow the process listed in the Identification Requirement section.

ADD AUTHORIZED USER:

- You will need the full name, phone number, and full social security in order to add a person
- Please advise the customer an authorized user will have full access to the account, and will also be financially responsible.

REMOVE AUTHORIZED USER:

- Only the main account holder can request to have an authorized person removed from the account.
- Transfer to **Credit Management** to remove

Verify Landlord

The property owner starts request on premises with an outstanding balance:

- Use the Account Tree to determine if the owner (calling customer) has already had service there.
- Use the property appraiser's website to verify the owner's name.
- If the property appraiser doesn't confirm. Prop appraise site says "Brenton 2 LLC" use Sunbiz website
- Sunbiz we can see that company is registered to Chris Macchia confirming we can start.

<https://search.sunbiz.org/Inquiry/CorporationSearch/ByName>

Detail by Entity Name	
Florida Limited Liability Company BRENTON 2, LLC	
Filing Information	
Document Number	L13000151946
FEI/EIN Number	46-4115491
Date Filed	10/29/2013
State	FL
Status	ACTIVE
Principal Address	
12417 CREEK EDGE DR RIVerview, FL 33579	
Mailing Address	
12417 CREEK EDGE DR RIVerview, FL 33579	
Registered Agent Name & Address	
CHRISTOPHER, MACCHIA 12417 CREEK EDGE DR RIVerview, FL 33579	
Authorized Person(s).Detail	
Name & Address	
Title MGR MACCHIA, CHRISTOPHER 12417 CREEK EDGE DR RIVerview, FL 33579	
Title MGR MACCHIA, CAROLYN 12417 CREEK EDGE DR RIVerview, FL 33579	
Annual Reports	
Report Year	Filed Date
2019	04/18/2019
2020	05/18/2020

Name Changes

For customers who wish to transfer deposit(s) on the account to an immediate family member; divorce and/or legal change of name; death.

NOTE: Name changes **are not** eligible if there is no deposit on the account, if the account is in an arrear's status, has an existing payment arrangement, or there is an active lien or encumbrance present.

- If no deposit exists on the account, they will have to start service as a new customer. (Refer to new deposit requirements per rate schedule).

Implementation/responsibility

- **The Customer services team-** will only send out “name change forms” and provide the customer with information on how to send death certificate copies. No changes will be made in CCS by customer services regarding name changes.
- **The Credit Management team-** is responsible for name changes performed in the CCS.

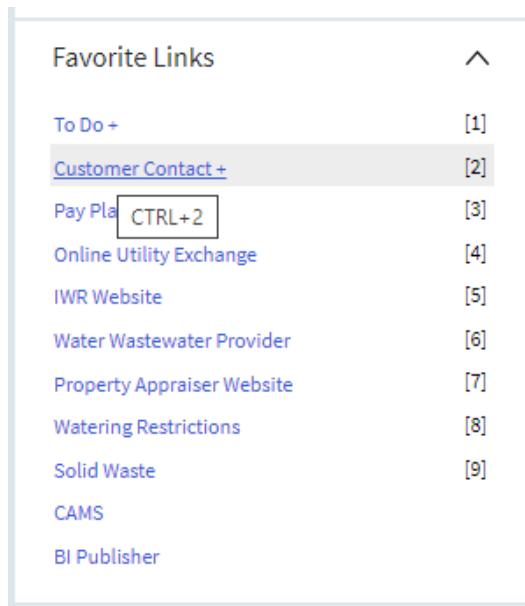
Name change to an ex-spouse (divorce) or immediate family member:

Customer service will review the account and send out the application. Once the application is returned it will be reviewed by the Credit Team Manager(s). If approved the account will be

updated by the credit team. Customer service does not make any name changes on accounts.

- The new Person must accept responsibility for all service agreements on the account.

Create the Customer Contact



Click contact type and choose **request for name change letter**

The screenshot shows the "Customer Contact" form with the following details:

CUSTOMER CONTACT INFO

OPEN	<input type="checkbox"/>	USER ID	JCARROLL
PERSON ID	<input checked="" type="checkbox"/> 2981154805	LINKOUS,VIRGINIA	
ACCOUNT ID	<input checked="" type="checkbox"/> 4244576799	LINKOUS,VIRGINIA, Residential, \$139.21	
PREMISE ID	<input checked="" type="checkbox"/> 7125110573	14511 WEEPING ELM DR, TAMPA, FL, 33626, SFH (Sub WESTWOOD LAKES PH 1A B)	
PREFERRED CONTACT METHOD	<input type="button" value="▼"/>		
CONTACT DATE/TIME	* 07-14-2022	4:50:27PM	<input type="button"/>
CONTACT CLASS	* Customer service contacts		
CONTACT TYPE	* NM-CHG	Request for Name Change Letter	
COMMENTS	PER VIRGINIA REQ TO TRANSFER ACCOUNT INTO EX-SPOUSE NAME* ADV DEPOSIT AND ACCOUNT HISTORY WILL BE FORFEIT* CUST UNDERSTOOD* ADV NAME CHANGE APPLICATION WILL BE MAILED, BOTH PARTIES NEED TO SIGN AND RETURN*		
RELATED RECORDS	<input type="button"/>		

Name change due to death:

If there is a **surviving spouse** – no name change form is needed.

- The surviving spouse must provide a photocopy of the death certificate where deposit SA is active.
- If there isn't a deposit on the account, the account has been active for at least 12 months with a good payment history or it can still be handled as a name change without requiring a deposit. A photocopy of the death certificate would still be required.
- We will no longer send original certificates back to the customer unless the customer request that we do so. Originals will be scanned then shredded.

If **no surviving spouse** – the next of kin or new legal receivership shall provide legal documentation showing ownership of property or financially responsible.

- The Customer can mail, fax, or email a copy of the death certificate.
- For emails have the customer send an email to WRSCC@hillsboroughcounty.org include account number, name, and contact information.

Legal name change:

A name change form is not required to change the last name due to marriage or divorce

- The customer must provide a copy of the legal document authorizing the name change.
 - Have customer send email to WRSCC@hillsboroughcounty.org including account number, name, and contact information.

Turn Off for Deceased

Request a copy of the death certificate to be mailed, faxed, or emailed- representative retracts social #

- Email: WRSCC@hcfl.gov
- Mail: BSOC
- Fax: 813-635-7387

If the person calling can't provide a copy of the death certificate:

- GOOGLE- customer's name, date of death, and city to try to locate "obituary"
- If the obituary can't be located, take the person calling information: full name, relationship to the customer, and their phone number, and review with an analyst.

Adding Additional Service with Or Without Deposit

When an active customer is requesting to add a new premise to their account

- Only one account per customer
- Only one bill will be printed for both premises, but the bill will be itemized per premise usage
- Account needs to be current. Any past due balances need to be paid
- No payment arrangements in the alerts (If there is a payment arrangement, transfer to credit management)
- No credit check- deposit is based on account deposit status (unless deposit can be waived per payment history)

Verify customer information

- Click on the hyperlink next to the person's notebook
- Verify the name, last 4 of social security, password (if there is one), phone number, and or email

The screenshot shows a 'Current Context' section with three items:

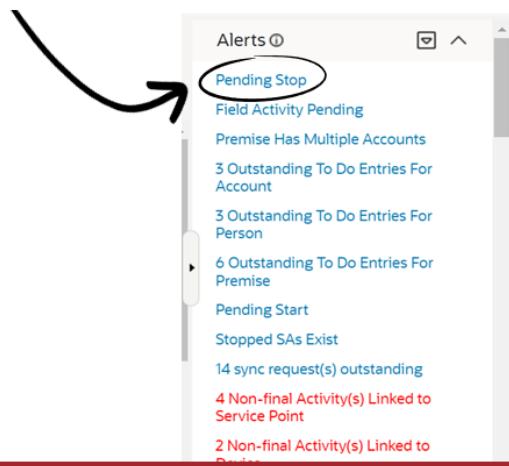
- A person icon with the name **ADEJUMO,KEHINDE** (highlighted with an orange oval and a blue arrow pointing to it).
- A document icon with the number **8030796339 9** and the text **ADEJUMO,KEHINDE, Residential, \$0.00**.
- A house icon with the address **17519 MEADOWBRIDGE DR, LUTZ, FL, 33549, SFH (Sub WINDEMERE)**.

Match with Move

This situation (Match With Move) exists when you are speaking to a new customer that wants to start service today, and there is already a Pending Stop for the existing customer dated today or the previous business day (based on the Pending Stop date of the Service Agreement). A Turn-Off Meter Field Activity has been dispatched.

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Once you get into the account where the customer is requesting a service, if there's a Pending Stop in the Alerts, check to see if it's for today's date.



If the turn-off has been completed, then the turn on request will be scheduled for the next day

- If there is a pending turn-off on a premise for today's date, and a new customer wants to start immediately, then that is the only time in which you are to cancel a pending "turn off" field activity.
- Any field activities that are set for a future date don't automatically cancel the field activity when starting a new customer.

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SA Premise List

PREMISE	CURRENT BALANCE	PAYOUT BALANCE	SA INFORMATION
⑤ 11742 ALBATROSS LN, RIVERVIEW, FL, 33589, SFH (Sub ESTUARY PHASE 5)	\$40.05	\$40.05	⑤ HCWRS / Waste Water Residential, WW-MTF Pending Stop, 06-18-2018 - 07-18-2022, 0033576058
⑤ 11742 ALBATROSS LN, RIVERVIEW, FL, 33589, SFH (Sub ESTUARY PHASE 5)	\$72.31	\$72.31	⑤ HCWRS / Water Residential, W-MTF Pending Stop, 06-18-2018 - 07-18-2022, 00335514983
⑤ 11742 ALBATROSS LN, RIVERVIEW, FL, 33589, SFH (Sub ESTUARY PHASE 5)	\$0.00	\$175.00	⑤ HCWRS / Deposit Residential, Active, 06-18-2018,, 0035912622

If the Pending Stop SA date is one business day behind the date of the dispatched Turn Off Meter FA date, a 5 pm tag was left for the customer.

A 5pm tag is left for the customer to let them know that the people who had water here *previously* turned it off, and if the current occupants don't call by 5pm to start services then they are going to be left without water. If the Field Service tech sees a car in the driveway or movement in the house, they will leave the water on. But, when the tech goes out the next day, despite who is at the residence, they will turn the water off. The bill will then be back dated to the original day that the stop was requested.

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Once confirmed, on the Account Information page, scroll down to the Premise Activity Overview.

Premise Activity Overview		
FA Date/Time	FA Information	Service Order Management Activity Information
05-23-2024 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Start/Stop Service Request , Stop Service, Pending, 05-23-2024 12:00:00AM	Disable Service Type / 3004 CEDARIDGE DR, TAMPA, FL, 33618, USA / 05-22-2024 10:27:52AM / 05-23-2024 12:00:00AM EDT // Activity In Progress
05-13-2024 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Start/Stop Service Request , Start/Stop Service, Pending, 05-13-2024 12:00:00AM	Back to Back Service Type / 3004 CEDARIDGE DR, TAMPA, FL, 33618, USA / 05-09-2024 9:41:48AM / 05-13-2024 12:00:00AM EDT // Activity In Progress
11-15-2023 5:26:29AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Severance Process , Disconnect Warning, Completed, 11-15-2023 5:26:29AM	Field Activity / Disconnect Warning / Customer to Meter / 9693631966 / Completed / Create Date Time: 11-15-2023 5:27:04AM
08-30-2023 8:00:00PM		Field Activity / Hazardous Meter Box/Lid Replacement / Field Services // Completed / Create Date Time: 08-08-2023 7:31:11AM
07-10-2023 12:00:00AM		Field Activity / Pd Svc Premise Investigation // Completed / Create Date Time: 07-07-2023 3:46:45PM
07-06-2023 2:07:12PM		Field Activity / Exchange Meter // Completed / Create Date Time: 07-06-2023 2:07:12PM

Premise Activity Overview

FA Date/Time	FA Information	Service Order Management Activity Information
05-23-2024 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Start/Stop Service Request , Stop Service, Pending, 05-23-2024 12:00:00AM	Disable Service Type / 3004 CEDARIDGE DR, TAMPA, FL, 33618, USA / 05-22-2024 10:27:52AM / 05-23-2024 12:00:00AM EDT // Activity In Progress
05-13-2024 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Start/Stop Service Request , Start/Stop Service, Pending, 05-13-2024 12:00:00AM	Back to Back Service Type / 3004 CEDARIDGE DR, TAMPA, FL, 33618, USA / 05-09-2024 9:41:48AM / 05-13-2024 12:00:00AM EDT // Activity In Progress
11-15-2023 5:26:29AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Severance Process , Disconnect Warning, Completed, 11-15-2023 5:26:29AM	Field Activity / Disconnect Warning / Customer to Meter / 9693631966 / Completed / Create Date Time: 11-15-2023 5:27:04AM
08-30-2023 8:00:00PM		Field Activity / Hazardous Meter Box/Lid Replacement / Field Services // Completed / Create Date Time: 08-08-2023 7:31:11AM
07-10-2023 12:00:00AM		Field Activity / Pd Svc Premise Investigation // Completed / Create Date Time: 07-07-2023 3:46:45PM
07-06-2023 2:07:12PM		Field Activity / Exchange Meter // Completed / Create Date Time: 07-06-2023 2:07:12PM

Here you are looking for either **Completed or Activity in Progress** for the most recent FA (Field Activity)...

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Premise Activity Overview

	FA Date/Time	FA Information	Service Order Management Activity Information
⌚ 1	05-23-2024 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Start/Stop Service Request , Stop Service, Pending, 05-23-2024 12:00:00AM ⓘ	Disable Service Type / 3004 CEDARIDGE DR, TAMPA, FL, 33618, USA / 05-22-2024 10:27:52AM / 05-23-2024 12:00:00AM EDT // Activity In Progress
⌚ 2	05-13-2024 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Start/Stop Service Request , Start/Stop Service, Pending, 05-13-2024 12:00:00AM ⓘ	Back to Back Service Type / 3004 CEDARIDGE DR, TAMPA, FL, 33618, USA / 05-09-2024 9:41:48AM / 05-13-2024 12:00:00AM EDT // Activity In Progress
⌚ 3	11-15-2023 5:26:29AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2, Severance Process , Disconnect Warning, Completed, 11-15-2023 5:26:29AM ⓘ	Field Activity / Disconnect Warning / Customer to Meter / 9693631966 / Completed / Create Date Time: 11-15-2023 5:27:04AM
⌚ 4	08-30-2023 8:00:00PM		Field Activity / Hazardous Meter Box/Lid Replacement / Field Services / // Completed / Create Date Time: 08-08-2023 7:31:11AM
⌚ 5	07-10-2023 12:00:00AM		Field Activity / Fld Svc Premise Investigation / // Completed / Create Date Time: 07-07-2023 3:46:45PM
⌚ 6	07-06-2023 2:07:12PM		Field Activity / Exchange Meter / // Completed / Create Date Time: 07-06-2023 2:07:12PM

If it says **Completed** on the correct date, you can stop here, the new customer will be turned on the next day.

If it says Activity in Progress, the field activity can be canceled, and the new customers will be started today.

To cancel a Field Activity, you will need to click in the blue hyperlink in the Service Order Management Activity Information column.

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Activity: Disable Service Type / 11742 ALBATROSS LN, RIVERVIEW, FL, 33569, USA / 07...

Main	Log	
11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active ⓘ	Contact Details	
Service Agreements		
EVENT TYPE	SERVICE AGREEMENT ID	USAGE SUBSCRIPTION
Stop Service	0033576058	BROWN,CAROLYN / Home Phone (813) 562-0581 / West ⓘ
Stop Service	0035514983	BROWN,CAROLYN / Home Phone (813) 562-0581 / West ⓘ

Activity Hierarchy

- Disable Service Type / 11742 ALBATROSS LN, RIVERVIEW, FL, 33569, USA / 07-16-2022 5:35:05PM / 07-18-2022 12:00:00AM EDT // Activity in Progress
- Field Activity / Turn Off Meter / Customer to Meter / 1453134180 / Communication In Progress / Create Date Time: 07-16-2022 5:35:06PM
- Field Activity Outbound Communication / Outbound / Awaiting Response / 07-16-2022 5:35:07PM

Once you click on the blue hyperlink it will bring you to this **Activity** page.

Under **Activity Hierarchy**, click on the second **green** hyperlink starting with

"Field Activity/Turn Off Meter"

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Main Log

Activity

Edit Initiate Update **Initiate Cancel** Retry Complete

Record Actions

Record Information

Request Information

Contact Details

Address Information

Address	1810 BROAD WINGED HAWK
City	RUSKIN
County	HILLSBOROUGH
Postal	33570
Country	United States of America
State	FL
Geographic Latitude	27.727500
Geographic Longitude	-82.409700

Information	Field Activity / Read Meter / Customer to Meter / 3691965750 / Completed / Create Date Time: 05-13-2024 1:04:52PM
Activity Type	Field Activity
Status	Completed
Service Date Time	05-13-2024 1:04:52PM EDT
Parent Activity	Back to Back Service Type / 1810 BROAD WINGED HAWK DRIVE, RUSKIN, FL, 33570, USA / 05-13-2024 1:04:51PM / 05-13-2024 1:05:00AM EDT // Completed
Service Point	1810 BROAD WINGED HAWK DRIVE, RUSKIN, FL, 33570 / WA/WATER METER / Meter Size <= 1-1/2 / Cycle 21, Hawk / 700580118 
Field Task Type	Read Meter
Recipient	Field Services
Comments	A/ON, RD 0335587.7 5/8
Device ID	700580118 / Water Smart Meter / Install Date/Time: 08-26-2022 12:01:00AM EDT / On / Neptune / Active 
Reference Date/Time for Measurement	05-13-2024 11:59:59PM EDT
Back To Back Start Event Date/Time	05-13-2024 2:12:11PM EDT

Clicking that green hyperlink will bring you to the **Activity: Field Activity** main page.

Here you will look to the **Comment** section to copy the 5pm tag comment (if there is one) for the email you will send to Field Service Dispatch. If there is no 5pm tag comment, you do not have to include the comment in the email.

Then, click **Initiate Cancel**.

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After clicking **Initiate Cancel**, this window will pop out. The only thing you need to do on this page is change the **Cancel Reason** to Match With Move.

Now you can go ahead and create the new customers account like you usually would, and get their water service started! The last step is just sending out the email to **Field Service Dispatch**.

Cancel Orchestration Activity

ORCHESTRATION ACTIVITY	55411470259863  Disable Service Type / 11742 ALBATROSS LN, RIVERVIEW, FL, 33569, USA / 07-16-2022 5:35:05PM / 07-18-2022 12:00:00AM EDT // Activity in Progress
RELATED ACTIVITY	41251045327597  Field Activity / Turn Off Meter / Customer to Meter / 1453134180 / Communication In Progress / Create Date Time: 07-16-2022 5:35:06PM
REQUESTER	Customer to Meter
REQUESTER TRANSACTION ID	1453134180
REQUESTER USER	JCARROLL
EXTERNAL REFERENCE ID	13469905021333
CANCEL REASON	Match With Move

Save Cancel

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To send the email there are a few things that need to be located...

The screenshot shows the Control Central interface for Account Information. It displays various tabs like Customer Information, Account Tree, Premise Tree, Bill/Payment Tree, and Payment Agreements. Under the Premise Tree tab, a list of premises is shown, including "11742 ALBATROSS LN, RIVERVIEW, FL, 33561, SFH (Sub WHINNEME EAST PH 2)". A red box highlights the "Service Area" section, which lists "11742 ALBATROSS LN, RIVERVIEW, FL, 33561, SFH (Sub WHINNEME EAST PH 2)" and "11742 ALBATROSS LN, RIVERVIEW, FL, 33561, SFH (Sub ESTUARY PHASE 5)". Below this, a "Premise Information" section provides details such as CDR Status, Building Permit Issuance Date, Inspection Assessment Program Date, Elevation Zone, Certificate of Occupancy Date, and Service Area.

On the Account Information home page, scroll down to the Premise Information and identify the Service Area.

Next, go to the Premise Notebook and click on the Geographic Data tab to copy the Zone information.

The screenshot shows the Premise Notebook interface with the "Geographic Data" tab selected. It displays a list of geographic types and their values for premise 11742 ALBATROSS LN, RIVERVIEW, FL, 33561. The "Zone" value is highlighted with a red box and labeled as "\$20".

GEOGRAPHIC TYPE	GEOGRAPHIC VALUE	FORMAT
Block	12	
Lot	08	
Parcel Number	077345.0264	
Service Request Number	12-0064	
Sub	ESTUARY PHASE 5	
Zone	\$20	

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The screenshot shows an Outlook message window titled "SOUTH - Message (HTML)". The recipient is "Field Service Dispatchers". The subject is "SOUTH". The body of the email contains the following text:

In the body of the email include the address, the zone, and "MATCH WITH MOVE". If there was a 5pm tag note in the comments that you copied, this would be where you paste it.

Send the email to Field Service Dispatchers, and CC all of the call center analysts.

In the subject of the email enter only the service area.

The screenshot shows an email inbox with an incoming message from "Moreno Tumero, Andrea" to "Field Service Dispatchers" with cc "Johnson, Tonji; Dunn, Dustin". The message body includes:

12751 BRAMFIELD DR
S23
MGM 5-23-24 RD 0017442.3 L/ON L/5PM W/POSS NEW CUST - MATCH WITH MOVE

Valentina Moreno
Customer Service Representative
Water Resources Department

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Unauthorized Usage

What is Unauthorized Usage/Consumption?

Unauthorized consumption is defined as any consumption used in the past 30 days at a premise (address) where no active customer exists.

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A customer calls to start a service at a premise with no current active customer...

The screenshot shows the HCFL Control Central software interface. At the top, there is a navigation bar with tabs: Account Information (selected), Customer Information, Account Tree, Premise Tree, Bill/Payment Tree, and Payment Agreements. Below the navigation bar, there is a section titled "Current Context" with three dropdown menus: PERSON, ACCOUNT ID, and PREMISE. The PREMISE dropdown is selected and shows the address: 123 E ST JOHNS WAY, APOLLO BEACH, FL, 33572, SFH (Sub APOLLO BEACH). To the right of these dropdowns are two buttons: "Start Service" and "Stop Service". Below this section, there is another panel titled "Premise Information" which contains detailed premises information. This includes fields for Premise Information (123 E ST JOHNS WAY, APOLLO BEACH, FL, 33572, SFH (Sub APOLLO BEACH)), CIS Division (HCWRS), Building Permit Issuance Date (2020-10-09), Certificate of Occupancy Date (2020-12-18), Service Area (South), Service Point Information (Device: Water Analog Meter / Effective Date/Time: 12-01-2020 12:00:00AM EST / Water Single Manual Register; Next Meter Read: 08-01-2022 12:00:00AM (Cycle 02) - Expected Work Date: 08-02-2022; Last Measurement: Value: 3,181.0, Regular 06-30-2022 9:45:09AM EDT, Measurement: 3,533, Previous Measurement: 352).

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A customer calls to start a service at a premise with no current active customer...

- Check the dashboard alerts, field activities, and usage history for possible unauthorized usage
- If there is usage in the last 30 days, unauthorized usage back bill is required to start new services.
- If new customer doesn't agree with the unauthorized back bill, the new owner or tenant can email credit management closing papers or lease agreements to review (don't start new customer, CM will follow up)

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Scroll down to the Premise activity overview and look for the field activity that contains the unauthorized usage



Click on the link to look into the field activity

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Activity: Field Activity / Fld Svc C/L/R - Unauthorized / Fiel...

Add Search Bookmark Refresh

Main Log

Activity

Main	Record Actions
INFORMATION Field Activity / Fld Svc C/L/R - Unauthorized / Field Services // Completed / Create Date Time: 06-03-2022 2:15:16PM	Record Information
ACTIVITY TYPE Field Activity	Request Information
STATUS Completed	Contact Details
SERVICE DATE TIME 06-03-2022 12:00:00AM EDT	Address Information
SERVICE POINT 1911 BLUE SAGE CT, BRANDON, FL, 33511 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 01, Shell Flower / Active <input checked="" type="checkbox"/>	ADDRESS 1911 BLUE SAGE CT BRANDON 33511
FIELD TASK TYPE Fld Svc C/L/R - Unauthorized	
WORK BY CREW HC	
RECIPIENT Field Services	
COMMENTS VFD LOCK WAS CUT OFF AND METER WAS TURNED ON. I REMOVED METER RD.1026/06	POSTAL

Reading the comments on the field activity should help you determine what additional fees will be required

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If there's no unauthorized field activity, check the usage history since the last disabled service field activity

SERVICE ORDER MANAGEMENT ACTIVITY INFORMATION

Disable Service Type / 123 E ST. JOHNS WAY, APOLLO BEACH, FL, 33572, USA / 05-09-2022 5:11:22AM / 05-04-2022 12:00:00A [EDT / 05-09-2022 12:23:13PM EDT / Completed]

MEASUREMENT DATE/TIME	START DATE/TIME	READING VALUE	MEASUREMENT	ADDITIONAL DETAILS
→ 06-30-2022 9:45:09AM EDT	06-01-2022 9:10:51AM EDT	3,533.000000	3,181.000000	Condition: Regular , Combined Multip
06-01-2022 9:10:51AM EDT	05-09-2022 12:23:13PM EDT	352.000000	0.000000	Condition: Regular , Combined Multip
05-09-2022 12:23:13PM EDT	05-03-2022 11:59:43AM EDT	352.000000	0.000000	Condition: Regular , Combined Multip
05-03-2022 11:59:43AM EDT	05-02-2022 9:42:16AM EDT	352.000000	0.000000	Condition: Regular , Combined Multip

Disconnect completed 5/09/2022, there should be no new usage

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Main

ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	08-15-2022 12:00:00AM EDT
PARENT ACTIVITY	
SERVICE POINT	927991074700 Q, 13503 RED EAR CT, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 07, Boyette Creek / Active
EXTERNAL SERVICE POINT ID	
FIELD TASK TYPE	Fld Svc C/L/R - Unauthorized
APPOINTMENT WINDOW DATE TIME	
APPOINTMENT END DATE TIME	
TAKEN BY	
TAKEN DATE	
COMMENTS	
RECIPIENT	
COMMENTS	
INSTRUCTIONS	TURN OFF COMPLETED ON 6/15* NO ACTIVE CUSTOMER, BUT THERE HAS BEEN USAGE AT PREMISE FOR THE LAST 2-MONTHS* TURN OFF WATER AND LOCK METER
REQUESTER	

Create a new field activity

If the new customer doesn't want to complete the new service request, the premise needs to be flagged for unauthorized usage to prevent further usage.

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If the new customer wants to complete the new service request, they first need to:

- Pay the remaining balance due (if existing customer) (new customer will be back billed)
- Pay the \$25 unauthorized usage fee
- Pay the \$25 set-up fee (if services have been stopped)
- Pay the deposit according to the provided services at the premise
- And if applicable, pay the \$20 missing lock fee, \$25 removed meter fee, and \$100 unauthorized connection fee.

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To add those charges to the account...

Action	Date	Cancel	Premise Information	SA Information
<input type="checkbox"/>	01-12-2024	<input type="button"/>	4210 GRAINY AVE, TAMPA, FL, 33624, SFH (Sub COUNTRY PLACE)	HCWRS / Waste Water Residential, WI Pending Start, 01-12-2024, 756494148
<input type="checkbox"/>	01-12-2024	<input type="button"/>	4210 GRAINY AVE, TAMPA, FL, 33624, SFH (Sub COUNTRY PLACE)	HCWRS / One Time Premise Charge, F, Start, 01-12-2024 - 01-12-2024, New Customer Existing Premise, 7567027096
<input type="checkbox"/>	01-12-2024	<input type="button"/>	4210 GRAINY AVE, TAMPA, FL, 33624, SFH (Sub COUNTRY PLACE)	HCWRS / Water Residential, W-MTR, F Start, 01-12-2024, 7568716900

Action	Date	Cancel	Premise Information	SA Information	Action	Date	Cancel	Account Info
<input type="checkbox"/>	01-12-2024	<input type="button"/>	4210 GRAINY AVE, TAMPA, FL, 33624, SFH (Sub COUNTRY PLACE)	HCWRS / Waste Water Residential, WI-MTR, Pending Start, 01-12-2024, 7564941489	<input type="checkbox"/>	01-08-2023	<input type="button"/>	BISNATH,ROD, Residential, S-2
<input type="checkbox"/>	01-12-2024	<input type="button"/>	4210 GRAINY AVE, TAMPA, FL, 33624, SFH (Sub COUNTRY PLACE)	HCWRS / One Time Premise Charge, Pending Start, 01-12-2024 - 01-12-2024, New Customer Existing Premise, 7567027096	<input type="checkbox"/>	01-08-2023	<input type="button"/>	BISNATH,ROD, Residential, S-2
<input type="checkbox"/>	01-12-2024	<input type="button"/>	4210 GRAINY AVE, TAMPA, FL, 33624, SFH (Sub COUNTRY PLACE)	HCWRS / Water Residential, W-MTR, F Start, 01-12-2024, 7568716900	<input type="checkbox"/>	01-08-2023	<input type="button"/>	BISNATH,ROD, Residential, S-2

Account ID	Service Agreement	Description on Bill	Total Bill Amount
7568672970	7567027096	New Development - Premise Based	2,206.00
Start Date	End Date		
01-12-2024	01-12-2024		
Billable Charge Template		Total Line Amount	0.00
NWDP/PREM		New Development - Premise Based	
Description on Bill			

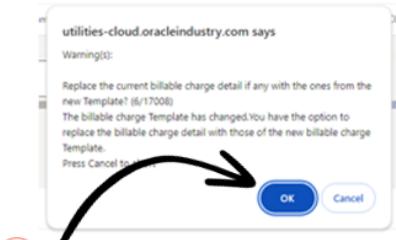
1 Click the arrow in the circle beside the One Time Premise Charge.

2 Click on Go To Billable Charge, and then on Add.

3 Click on the magnifying glass next to the Billable Charge Template and change it to NEWCUST.

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To add those charges to the account...



4 Click OK on the warning that will pop up.

5 Depending on what applies, delete the unnecessary charges.

Line Sequence	Description on Bill	Change Amount
20	Missing Lock and/or Device Fee	\$20.00
30	Unauthorized Usage Fee	\$25.00
40	Unauthorized Connection Fee	\$100.00
50	Meter Re-install Fee	\$50.00

Line Sequence	Description on Bill	Change Amount
30	Unauthorized Usage Fee	\$25.00

6 Press Save and make the customer aware of all applied charges.

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Lastly, create a to-do for accounting to back bill the responsible party for the unauthorized usage

The screenshot shows a 'Add To Do Entry - Google Chrome' window. The URL is utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG... .

TO DO TYPE: Manual To Do Entry

OVERRIDE PRIORITY: Priority 10 -- Highest

SUBJECT: ACCOUNT#0025490345/BACK BILL

COMMENT: PLEASE BACK BILL FROM (LAST DATE SERVICES WERE STOPPED.)

SEND TO: Role

ROLE: ACCT SPVR (Accounting Supervisor)

CHARACTERISTICS:

	CHARACTERISTIC TYPE	CHARACTERISTIC VALUE
+	C1-ACCT	Account 0025490345

OK Cancel

Water Running Inside (WRI)

What is Water Running Inside (WRI)?

The customer states that they requested a turn-on, but the water is still off and there's a door tag.

WATER RUNNING INSIDE: Water running inside (**WRI**) is a term used to describe the situation that occurs when a field service representative (FSR) turns the water meter on and the flow through the meter does not flooding the customer's home stop once the lines are filled. The water is turned off to prevent e or cause any other damage (ex: faucet on or running toilet).



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Premise Activity Overview

FA DATE/TIME	FA INFORMATION	SERVICE ORDER MANAGEMENT ACTIVITY INFORMATION
06-04-2021 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Start/Stop Service Request , Start Service, Completed, 06-04-2021 12:00:00AM	Enable Service Type / 1101 BELLADONNA DR, BR 12:00:00AM EDT / 06-04-2021 10:04:21AM EDT / C
05-27-2021 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Start/Stop Service Request , Stop Service, Completed, 05-27-2021 12:00:00AM	Disable Service Type / 1101 BELLADONNA DR, BR 12:00:00AM EDT / 05-27-2021 2:26:00PM EDT / C
11-25-2019 5:10:12AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Severance Process , Disconnect Warning, Completed, 11-25-2019 5:10:12AM	Field Activity / Fld Svc Pre-Tag Notice / Customer 5:10:12AM
09-25-2019 5:11:11AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Severance Process , Disconnect Warning, Completed, 09-25-2019 5:11:11AM	Field Activity / Fld Svc Pre-Tag Notice / Customer 5:11:11AM

When the customer calls, pull up the account with their information and scroll down to the **Premise Activity Overview**. Once here, find the field activity for the turn-on and click on the **Service Order Management Activity Information** blue hyperlink.

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This will bring you to the **Activity** page. Scroll down to the **Activity Hierarchy** and click on the 2nd hyperlink **Field Activity/Turn On Meter**. This will bring you to the comments which will say why it wasn't turned on.

Activity Hierarchy

- Enable Service Type / 1101 BELLADONNA DR, BRANDON, FL, 33510, USA / 06-03-2021 9:33:10AM / 06-04-2021
- Field Activity / Turn On Meter / Customer to Meter / 2210832939 / Completed / Create Date Time: 06-03-2021 9:33:13AM**
- Field Activity Outbound Communication / Outbound / Completed / 06-03-2021 9:33:13AM
- Field Activity Inbound Communication Type / Inbound / Completed / 06-04-2021 10:04:43AM
 - Connect SP - Field Work Completion / 06-04-2021 10:04:43AM / Executed
 - Connect Meter - Field Work Completion / 06-04-2021 10:04:43AM / Executed
 - Create FA IMD Completion Event / 06-04-2021 10:04:43AM / Executed

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Activity

Main	Record Actions	
INFORMATION ACTIVITY TYPE STATUS SERVICE DATE TIME PARENT ACTIVITY SERVICE POINT FIELD TASK TYPE RECIPIENT COMMENTS	Field Activity / Turn On Meter / Customer to Meter / 2210832939 / Completed / Create Date Time: 06-03-2021 9:33:13AM Field Activity Completed 06-04-2021 12:00:00AM EDT Enable Service Type / 1101 BELLADONNA DR, BRANDON, FL, 33510, USA / 06-03-2021 9:33:10AM / 06-04-2021 12:00:00AM EDT / 06-04-2021 10:04:21AM EDT / Completed 1101 BELLADONNA DR, BRANDON, FL, 33510 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 19, Timberpond / Active Turn On Meter Field Service 06735/28-/47 T/ON WRI L/OFF AT MTR L/TAG N/M/M, VERIFIED CHV IS NOT HOLDING	This comment translates to: 06735/28-/47, turned on the meter, water was running inside, left water off at the meter, left a door tag, no more movement, verified customer hand valve is not working.

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Activity①

Main	Record Actions ①	
INFORMATION	Field Activity / Turn On Meter / Customer to Meter / 2210832939 / Completed / Create Date Time: 06-03-2021 9:33:13AM	This comment translates to: 06735/28-/47, turned on the
ACTIVITY TYPE	Field Activity	
STATUS	Completed	
SERVICE DATE TIME	06-04-2021 12:00:00AM EDT	
PARENT ACTIVITY	Enable Service Type / 1101 BELLADONNA DR, BRANDON, FL, 33510, USA / 06-03-2021 9:33:10AM / 06-04-2021 12:00:00AM EDT / 06-04-2021 10:04:21AM EDT / Completed	
SERVICE POINT	1101 BELLADONNA DR, BRANDON, FL, 33510 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 19, Timberpond / Active <input checked="" type="checkbox"/>	
FIELD TASK TYPE	Turn On Meter	
RECIPIENT	Field Services	
COMMENTS	06735/28-/47 T/ON WRI L/OFF AT MTR L/TAG N/M/M, VERIFIED CHV IS NOT HOLDING	 customer hand valve is not working.

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For instance, if the comment left said: T/ON RD 5076/96--5077/11 WATER IS OFF AT CHV RIGHT SIDE OF HOME

BROWN HANDLE N/M/M

It would translate to 5076/96--5077/11 water is off at customer hand valve, located on right side of the home, it's a brown handle, no more movement.

This doesn't require another FSR trip. Let the customer know the water is on at the meter and they just need to turn the hand valve to start water.

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But back to the first example...

As previously mentioned, if the water was left off at the meter and not able to be turned on at the Customer Hand Valve (CHV), a 2nd WRI trip is required.

- For the 2nd WRI trip, there is no fee, and it can be completed on the same day as the first trip out (once the customer calls, after receiving the door tag). If its past 4:30pm though, it will have to be scheduled for the next day.
- Keep in mind if the water is still running, and the customer is not home, the water will be left off at the meter again to keep from the county being liable for flooding or water damage.
- 3rd WRI trips are scheduled the for next day, and there's a \$15 fee for the 3rd trip.

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To schedule the next trip out...

- 1 First, dispatchers should be contacted to determine if this additional premise visit can be accommodated with their daily workload.
- 2 Next, ensure the customer or an approved person are on-site to confirm that everything is off inside the building and/or assume responsibility for leaving services on while water consumption is registering at the meter.
- 3 Finally, if the request cannot be accommodated, then it will need to be scheduled for the next business day.

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Current Context

BROWNS,ADRIAN X
3280721831 1 BROWN,ADRIAN X, Residential, \$115.38
12816 TAR FLOWER DR, TAMPA, FL, 33626, SFH (Sub WESTWOOD LAKES PH 2B)

1 Go to Current Context on the dashboard and click on the Premise hyperlink.

- 2 On the Premise page, scroll down to the Premise Information and click the next to the “SP” meter information.

1 premise - 3004 CEDARIDGE DR, TAMPA, FL, 33626 / SEN IS IN NORTHE KFES SAGEBRUSH
2 SP - 3004 CEDARIDGE DR, TAMPA, FL, 33626 / WA/WW RESIDENTIAL Meter Size <= 1 / 2 / Cycle 10, Lakeview/ Copperfield / Active / 702668390
Device Configuration - 702668390 / Water Smart Meter / Effective Date/Time: 05-29-2022 12:00:00AM EDT / Water Single Auto Register / Go To Service Point
Device Configuration - 92998116 / Water Analog Meter / Effective Date/Time: 11-27-2012 12:00:00AM EDT / Water Single Manual Register
Field Activity - Field Activity / Turn Off Meter / Customer to Meter / 969046531 / Communication In Progress / Create Date Time: 05-22-2022 12:00:00AM EDT / Go To 360 View
Field Activity - Field Activity / Read Meter / Customer to Meter / 969046531 / Communication In Progress / Create Date Time: 05-29-2022 12:00:00AM EDT / Go To Activity
Account - 230053685 RIVERS,BROOKE K, Residential, \$0.00 Go To Appointment Portal
Account - 1267615246 WILLIAMS,DELICEER, Residential, \$946.39 Go To DataRaker
Historical service agreement(s) exist. Go To Device
Go To Install Event

3 Add Field-Related Activity

3 Click on Add Field Related Activity to create a new field activity.

If there is more than one meter on the premise, make sure you select the correct meter.

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Select Type

ACTIVITY: **Field Activity**

OK Cancel

Field Activity

Main

ACTIVITY TYPE: Field Activity

SERVICE DATE TIME: 07-13-2022 12:00:00AM EDT

PARENT ACTIVITY:

SERVICE POINT: 664831032000 12816 TAR FLOWER DR, TAMPA, FL, 33626 / WA/WW RESIDENTIAL Meter Size <= 1-04, Westwood/9 Eagle / Active

EXTERNAL SERVICE POINT ID:

FIELD TASK TYPE: Fld Svc T/ON WRI 2nd

APPOINTMENT WINDOW DATE TIME:

APPOINTMENT END DATE TIME:

TAKEN BY:

TAKEN DATE:

COMMENTS:

RECIPIENT:

COMMENTS:

INSTRUCTIONS: CUST STATED LEAK HAS BEEN REPAIRED

1 For the type of activity, select **Field Activity**

2 In the **instructions** box, include if the customer will be home or if the issue has been resolved (repaired) for the field service representative.

NORTH - Message (HTML)

To: Field Service Dispatchers
Cc: Johnson, Tonja Joyner, Kashawunda (Nikki); Joyner, Kashawunda (Nikki); Stevens, Stacey; Cleveland, Nakaybaw; Thomas, Yamilla

Subject: NORTH

12816 TAR FLOWER DR, TAMPA, FL, 33626, SFH
N7
WRI 2ND TRIP

3 ONLY for a **same-day WRI trip**, send an email to dispatch with this information. Make sure to copy the analysts and supervisors.

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Chapter Four: Call Types To Review

In this chapter, we will be listening to a few calls. On this page, please feel free to note anything you notice or have questions on.

1. Straight Start

2. Start Service for Previous Customer **with** Deposit

3. Start Service for Previous Customer **without** Deposit

4. Transfer Service **with** Deposit

5. Transfer Service **without** Deposit

6. Match with Move

7. Adding Additional Service **with** Deposit

8. Adding Additional Service **without** Deposit

Chapter Five: IVR/IWR (Interactive Voice Response/ Interactive Web Response)

IVR (Interactive Voice Response)

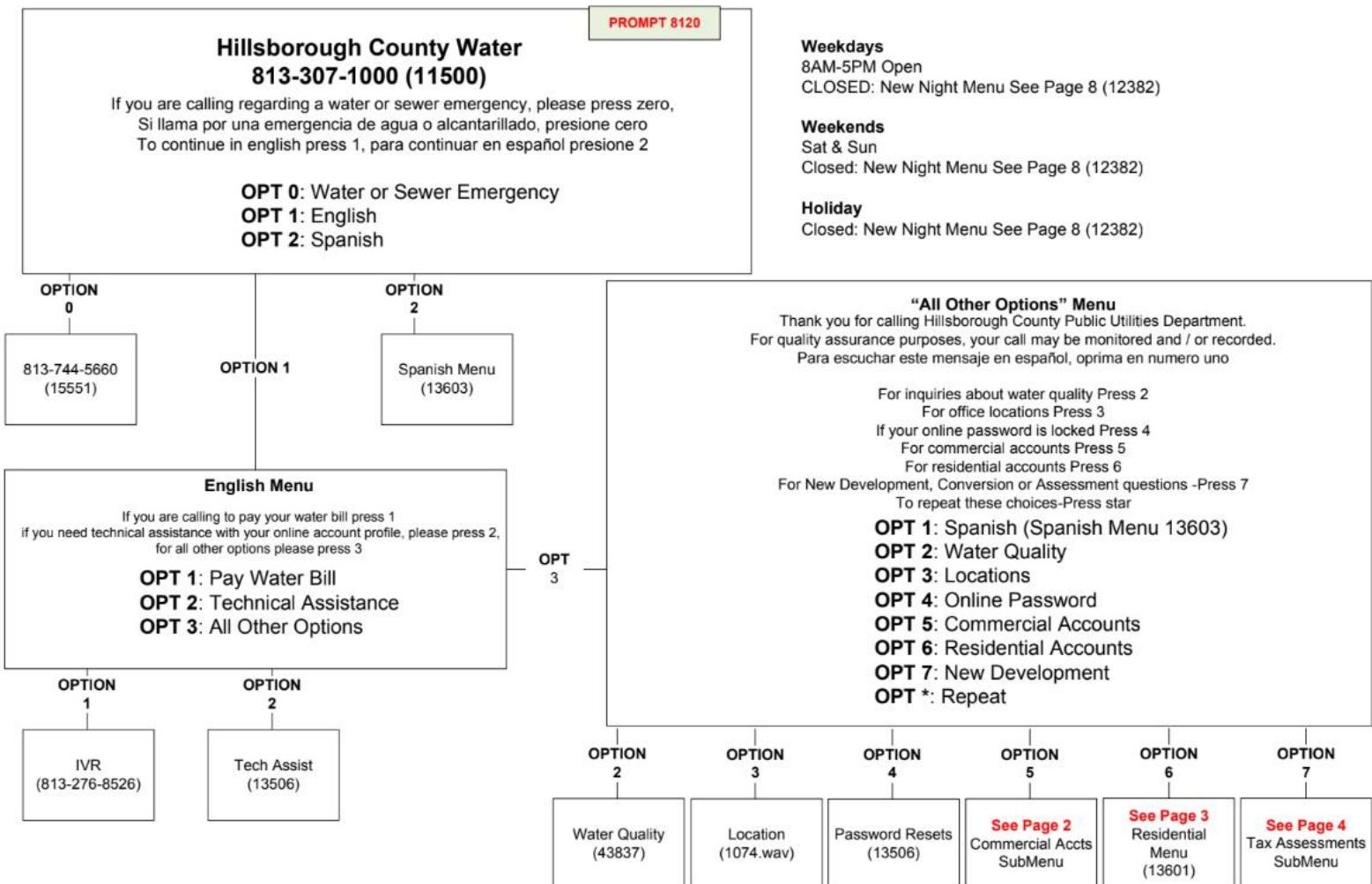
IVR on the other hand refers to the automated phone line that Hillsborough Water customers use to complete their payments. When it comes to making payments, there are a few ways to do so, but this is a popular way. With the IVR line though, there are a few things to keep in mind:

- The customer must have their account number when they call in.
- The number (or email) on the account *has* to be accessible for the authorization codes to be received to continue usage. *ANI (Automatic Number Identification) will recognize the number if it is the registered one on the account, without requiring MFA.*
- When using the phone line, the caller **MUST** be muted when they aren't speaking. The IVR is extremely sensitive and any small noise, even a breath, could send the customer back to customer service. Advise the customer to type in their entries rather than voicing them.
- The customer must enter the amount they are wanting to pay, and that would require the use of an asterisk and the pound sign, like this: A \$54.89 payment = 54*89#
- If the customer is unable to complete the payment or the system detects issues 3 times (per field) while the customer is using the IVR, they will automatically be sent back to the customer service line.

The phone number for the IVR is: 813-276-8526

IVR (Interactive Voice Response) (Call Tree)

This is the map showing the way calls are directed and the options that our customers have when calling in.



IWR (Interactive Web Response)

When our customers go online to pay their bill, this is what we refer to as IWR. Within this chapter, IWR will be spoken about in two different ways: **IWR** and **IWR Admin**.

IWR is the govone.com/waterbill site, whereas IWR Admin is what we use behind the scenes to assist customers with their username, password, email. Sometimes, customers will require extra assistance in creating their account, so it is important to be familiar with the IWR (waterbill) site. Thankfully, guides and videos are available for both call center reps and customers to access on the IWR site.

Keep in Mind...

Customers call tech support for help with not only logging into their account, or changing their password but possibly navigating the website, and maybe even their computer.

Be patient and keep it simple!

When the Customer Calls...

Customers are typically calling for one (or more) of these three issues:

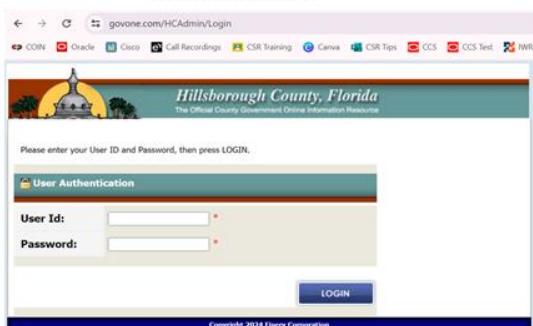
- ① To change or confirm their password
- ② To change or confirm their email (MFA)
- ③ To change or confirm their autopay

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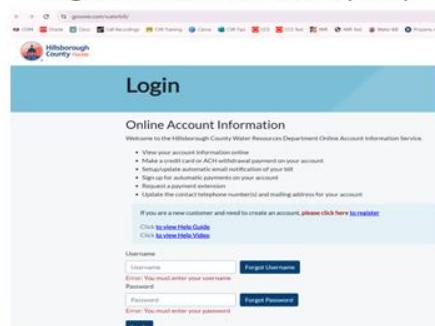
To Start

When using IWR, make sure to have these four things open:

1. IWR Admin



2. govone.com/waterbill (IWR)



3. Email

Hillsborough County Admin Authorization Code



4. Cisco



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1

ZOOM Recording ACTIVE
Agent CSQ Statistics Report

CSQ Name: Callers_CSQ
Number: 250
SP_Callers_CSQ
SP_Number: 250

03:01 | Caller: 1813 | 1813 | 1813

Sign Out | My Profile | My Devices

Call ID: 4112

2

Control Central Search

Main

Control Central Search

Search By: Person Contact

Person Contact Format/Number: (999) 999-9999 (555) 842-7635

CIS Division:

Show All Premises

Search

3

Current Context

Person: RIVERS,BROOKE K
Account ID: 2300653685 0 RIVERS,BROOKE K, Residential, \$0.00
Current Balance: \$0.00
Premise: 3004 CEDARIDGE DR, TAMPA, FL, 33618, SFH (Sub NORTHLAKES B SAGEBRUSH)

Customer Information (Map Zone)

Account ID: 2300653685
Main Customer: RIVERS,BROOKE K
Set Up Date: 05-09-2024
CIS Division: HCWRS
Customer Class: Residential
Current Credit Rating: 1000
Next Credit Review Date: 05-20-2024
Cell Phone: (555) 842-7635
Social Security: *****9999
Email Address: riversbk@live.com

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In IWR Admin

1

Hillsborough County, Florida
The Official County Government Online Information Resource

Create/Update User

Your Account
Change My Password
Logout

IWR User Information

You have either entered an invalid account number or no registered user found associated with account number provided.

Account Number: 2300653685

Submit

Password Locked?

New Temporary Password:

Web passwords are required to be a minimum of 9 characters in length, maximum of 64 characters in length and contain at least 1 uppercase, 1 lowercase, 1 number , 1 special character(!@#\$%^&*) and cannot contain a character repeated more than 2 times in a row.

Update Email Address:

CANCEL UPDATE

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X Not registered online

2

Hillsborough County, Florida
The Official County Government Online Information Resource

Create/Update User

Your Account
Change My Password
Logout

IWR User Information

User found. Name: FIGHT,MEGHAN P Username: Meghan.Fight@gmail.com

Account Number: 6110344149

Submit

Password Locked?

New Temporary Password: Limdc50\$L

Web passwords are required to be a minimum of 9 characters in length, maximum of 64 characters in length and contain at least 1 uppercase, 1 lowercase, 1 number , 1 special character(!@#\$%^&*) and cannot contain a character repeated more than 2 times in a row.

Update Email Address:

CANCEL UPDATE

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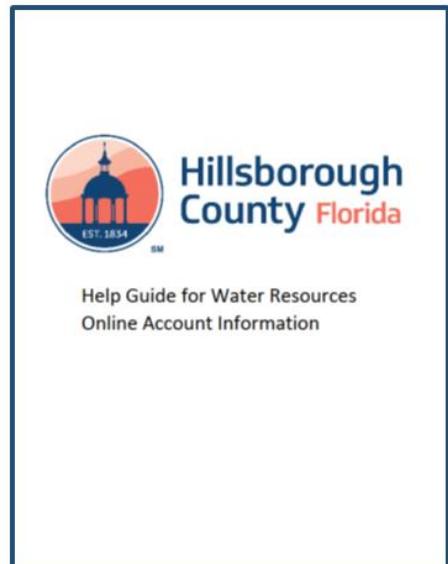
In IWR Admin

1

If you receive this message, that means the customer needs to create an account.

Not registered online

Lead them to govone.com/waterbill/ and go through the creation process



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In IWR Admin

1. If the customer already has an account, their username will auto-populate.

2. Clear out the temporary password

3. Re-enter the customers confirmed email in “Update Email Address” and press UPDATE

4. If needed, in the temporary password field enter an easier one like:

Tampa12345!, Paper12345@, House12345\$

and press UPDATE again.

2

Registered online

Create/Update User

our Account

Change My Password
Logout

IWR User Information

User found. Name: FIGHT,MEGHAN P Username: Meghan.Fight@gmail.com

Account Number: Submit

Password Locked?

New Temporary Password:

Web passwords are required to be a minimum of 9 characters in length, maximum of 64 characters in length and contain at least 1 uppercase, 1 lowercase, 1 number , 1 special character(!@#\$%^&*) and cannot contain a character repeated more than 2 times in a row.

Update Email Address:

CANCEL UPDATE

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govone.com/waterbill/

Login

Online Account Information

Welcome to the Hillsborough County Water Resources Department Online Account Information Service.

- View your account information online
- Make a credit card or ACH withdrawal payment on your account
- Setup/update automatic email notification of your bill
- Sign up for automatic payments on your account
- Request a payment extension
- Update the contact telephone number(s) and mailing address for your account

If you are a new customer and need to create an account, [please click here to register](#)

Click [to view Help Guide](#)
Click [to view Help Video](#)

Username Forgot Username
Error: You must enter your username

Password Forgot Password
Error: You must enter your password

Log In

After providing the customer with their chosen username and new temporary password, have them attempt the log-in information by logging in on

govone.com/waterbill/

Once there, it will prompt them to change their password to a permanent one on their end.

PASSWORDS CANNOT BE REUSED

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govone.com/waterbill/

Login

Online Account Information

Welcome to the Hillsborough County Water Resources Department Online Account Information Service.

- View your account information online
- Make a credit card or ACH withdrawal payment on your account
- Setup/update automatic email notification of your bill
- Sign up for automatic payments on your account
- Request a payment extension
- Update the contact telephone number(s) and mailing address for your account

If you are a new customer and need to create an account, [please click here to register](#)

Click [to view Help Guide](#)
Click [to view Help Video](#)

Username Forgot Username
Error: You must enter your username

Password Forgot Password
Error: You must enter your password

Log In

If they are not able to successfully log-in, make sure they are checking the spelling for both the **email** and new chosen **password**.

If they are still having trouble logging in, please escalate it to a supervisor or your trainer to contact the customer and work through the account issue.

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IWR Admin Error

When using the IWR Admin site, if the page times out you will get this message. To make it easier on yourself, just select the first option.



Admin Concurrent Session

Concurrent Session

End the other session and start a new session
Abandon this Session and return to Login Page

SUBMIT

(If you chose the second option "Abandon this Session and return to Login Page", it will take you back to the IWR Admin page and make you start all over.)

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Things to Remember

IWR updates CCS

CCS does not update IWR.

Make sure the customer knows how to spell govone, and make sure they are on our page, not City of Tampa.

Remind the customer to only press the "Resend Code" once. Too many email codes can create confusion.

When the customer is creating a username, make sure it is ONLY lowercase letters and numbers.

Sometimes the customer might need to check their junk/spam folder for verification emails.

When signing up for auto-pay on IWR, the balance on the account has to be paid first. It will update immediately.

The one-time payment does not save as the auto-payment. That will need to be entered separately.

Signing up for auto-pay does not automatically sign the customer up for paperless billing.

Auto-pay takes **30 days** to go into effect.

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Chapter Six: CSR Trainee Responsibilities

Call Tracking Sheet

While in training, all CSRs are required to track their calls so the analysts and supervisors can review the calls. This is not only for consistency and transparency's sake, but also to provide workable live learning opportunities. On this Excel sheet the date/time the call was received, the account number for the customer, the name of the customer/caller, the reason for the call, and the notes left on the account will be tracked. This will be sent to you by the time you start taking calls. It will look like this:

A	B	C	D	E
Date/time received	Account #	Name	Reason for call	Notes

Call Evaluation Form

Once both CSR 1 and CSR 2 training have been completed, this form will be used to evaluate calls. Ideally, having this information beforehand will allow CSRs to be aware of how the call will be reviewed, encouraging appropriate call handling from day one.

CUSTOMER SERVICE CALL EVALUATION FORM

Employee: _____ Evaluator: _____
 Time of call: _____ Date of call: _____ Date Observed: _____
 Acct#/Address: _____

Yes = 1 Point	No = 1 Point	N/A= 1 Point	Comments *if question is not applicable enter N/A
---------------------	--------------------	--------------------	---

A Greeting

- 1 Did the CSR thank the customer for calling & identify themselves to the customer?
- 2 Did the CSR use a professional/friendly tone?
- 3 Mention call is being recorded
- 4 Congratulate the customer on home purchase

B Verification

- 5 Did CSR ask caller their name and verify last four of social security number?
- 6 Was the telephone/email address updated?
- 7 Did the CSR verify they were speaking with the customer or an authorized agent?

C Problem Solving

- 8 Was open ended probing questions asked to identify the concern?
- 9 Was customer provided correct answers & deposits/fees/billing? Were alerts checked?
- 10 Was procedures and processes followed?
- 11 Was management advised of any new issue or problem with system or billing?
- 12 Was 1st call resolution provided?

D Listening

- 13 Allowed customer to state concern without interruption
- 14 Restated concern for confirmation

E High Usage

- 15 Was prior billing reviewed for misread or estimate? Did CSR review possible causes of high usage with the customer?
- 16 Was the customer advised customer how to verify meter reading?
- 17 Was customer advised how to check for leaks & asked to do the necessary steps to check for the problem?
- 18 Covers all of the above before sending out a field rep

F Customer Service Quality and Etiquette

- 19 Was customer's permission asked before placing them on hold or transferring the call. Was hold time limited?
- 20 Did CSR use the pause/resume when required?

23 Were the appropriate field activities scheduled using correct codes?	
24 Was customer advised of alternative ways to access their account, pay their bill (IVR/IWR)?	
Score	

G Closure

- 21 Did CSR recap the conversation?
- 22 Did the CSR properly note the account comments?

0.00

0-64% and below is Unacceptable and requires improvement	86
70-65% Below Expectations	
71-85% Meets Expectations	
92% Exceeds Expectations	
Remarkable	93-100%

CSR 2

MODULE

Chapter Seven:

Customer Bill View

CCS vs. OnBase

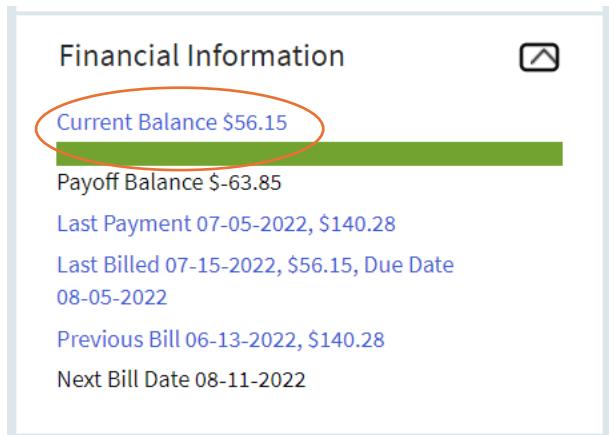
As we learned in CSR Module One, CCS is the program we use to manage our Hillsborough Water Department customers accounts. OnBase on the other hand, is the program we use to view the customers bills the way they see them. OnBase is linked within CCS, and CCS provides a way to access OnBase within the customers account to view their bill. This comes in handy when customers call in and ask about the charges on their bill, and are requesting explanations for those charges. (See page 19-21 of this handbook for a customer bill break down.)



CCS Display Bill



Click the **On Base** icon on your computer screen

A screenshot of a dashboard titled "Financial Information". It displays the following information:

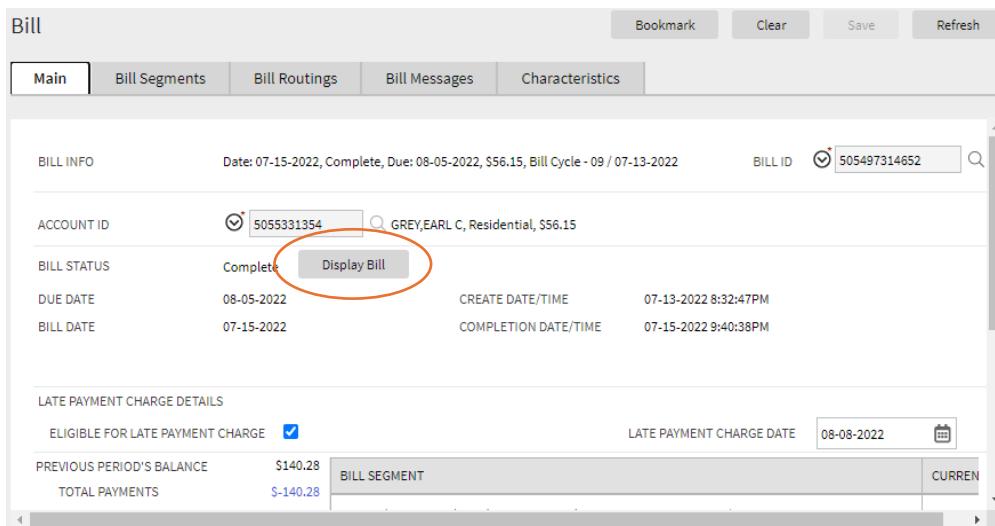
- Current Balance \$56.15 (circled in red)
- Payoff Balance \$-63.85
- Last Payment 07-05-2022, \$140.28
- Last Billed 07-15-2022, \$56.15, Due Date 08-05-2022
- Previous Bill 06-13-2022, \$140.28
- Next Bill Date 08-11-2022

Click on **Current Balance** in the Financial Information dashboard

Click on the **Bill Segment** of the bill date you are trying to view

	Arrears Date	Financial Transaction Type	Current Amount	Current Balance
1	06-14-2024	Bill Segment (circled in red)	\$78.53	\$80.66
2	06-14-2024	Pay Segment	-\$80.00	\$2.13

Click the **Display Bill** button

A screenshot of a "Bill" display interface. The top navigation bar includes "Main", "Bill Segments", "Bill Routings", "Bill Messages", and "Characteristics". The "Bill Segments" tab is active. The "BILL INFO" section shows:

- ACCOUNT ID: 5055331354 (with a checked checkbox)
- BILL STATUS: Complete
- DUE DATE: 08-05-2022
- BILL DATE: 07-15-2022
- CREATE DATE/TIME: 07-13-2022 8:32:47PM
- COMPLETION DATE/TIME: 07-15-2022 9:40:38PM

The "Display Bill" button is circled in red. Below this, the "LATE PAYMENT CHARGE DETAILS" section shows:

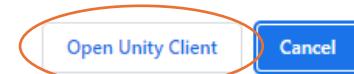
- ELIGIBLE FOR LATE PAYMENT CHARGE:
- LATE PAYMENT CHARGE DATE: 08-08-2022

At the bottom, there is a table with columns "PREVIOUS PERIOD'S BALANCE" (\$140.28), "TOTAL PAYMENTS" (\$-140.28), "BILL SEGMENT", and "CURREN".

Open Unity Client?

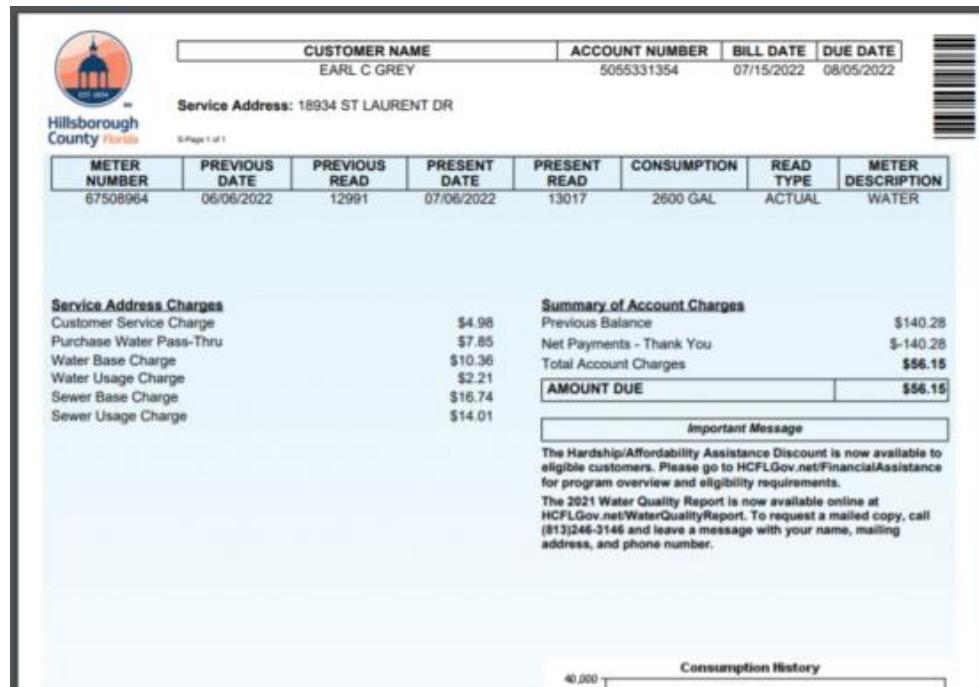
<https://utilities-cloud.oracleindustry.com> wants to open this application.

Always allow utilities-cloud.oracleindustry.com to open links of this type in the associated app



This box will pop-up when you click the Display Bill button. Proceed by clicking **Open Unity Client**.

Then, the selected bill will pop-up and look like this: 



METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION	READ TYPE	METER DESCRIPTION
67508964	06/06/2022	12991	07/06/2022	13017	2600 GAL	ACTUAL	WATER

Service Address Charges:

Customer Service Charge	\$4.98
Purchase Water Pass-Thru	\$7.85
Water Base Charge	\$10.36
Water Usage Charge	\$2.21
Sewer Base Charge	\$16.74
Sewer Usage Charge	\$14.01

Summary of Account Charges:

Previous Balance	\$140.28
Net Payments - Thank You	\$-140.28
Total Account Charges	\$56.15
AMOUNT DUE	\$56.15

Important Message:

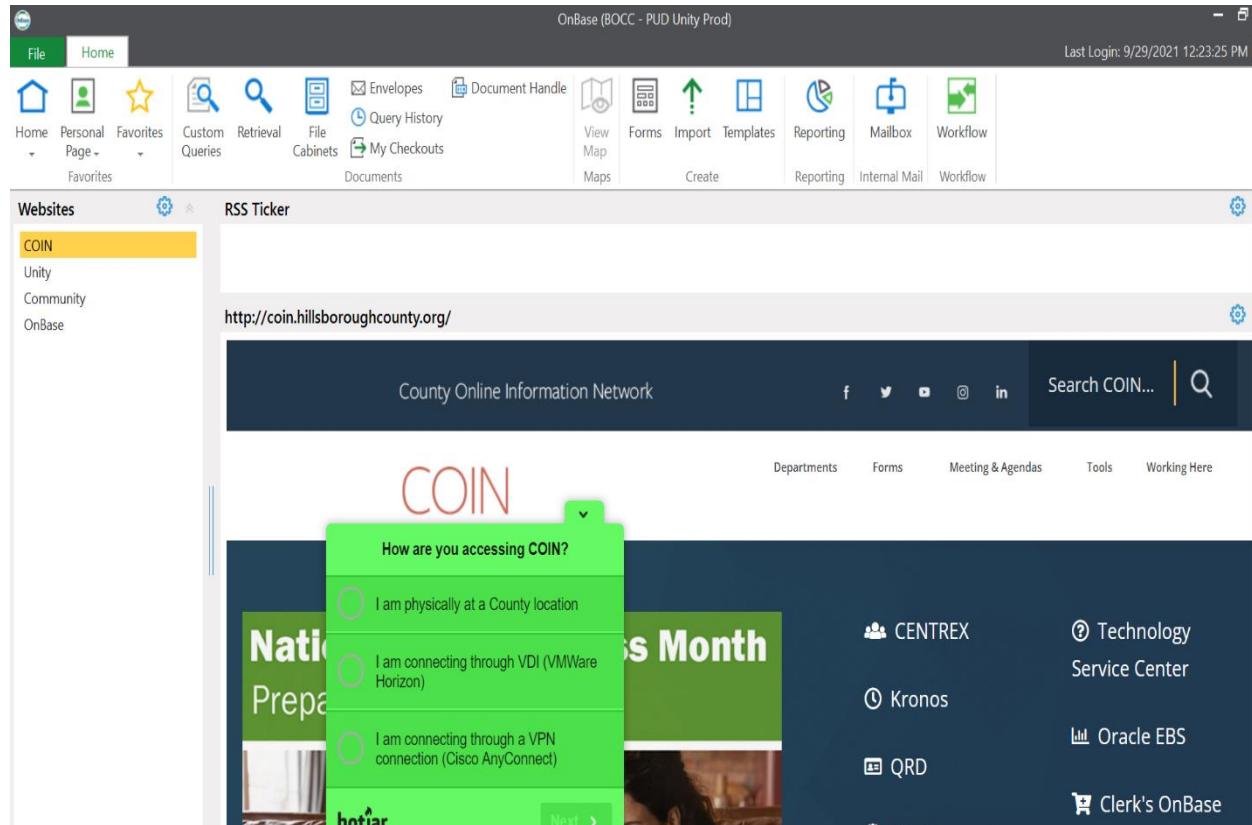
The Hardship/Affordability Assistance Discount is now available to eligible customers. Please go to HCFL.Gov.net/FinancialAssistance for program overview and eligibility requirements.

The 2021 Water Quality Report is now available online at HCFL.Gov.net/WaterQualityReport. To request a mailed copy, call (813)246-3146 and leave a message with your name, mailing address, and phone number.

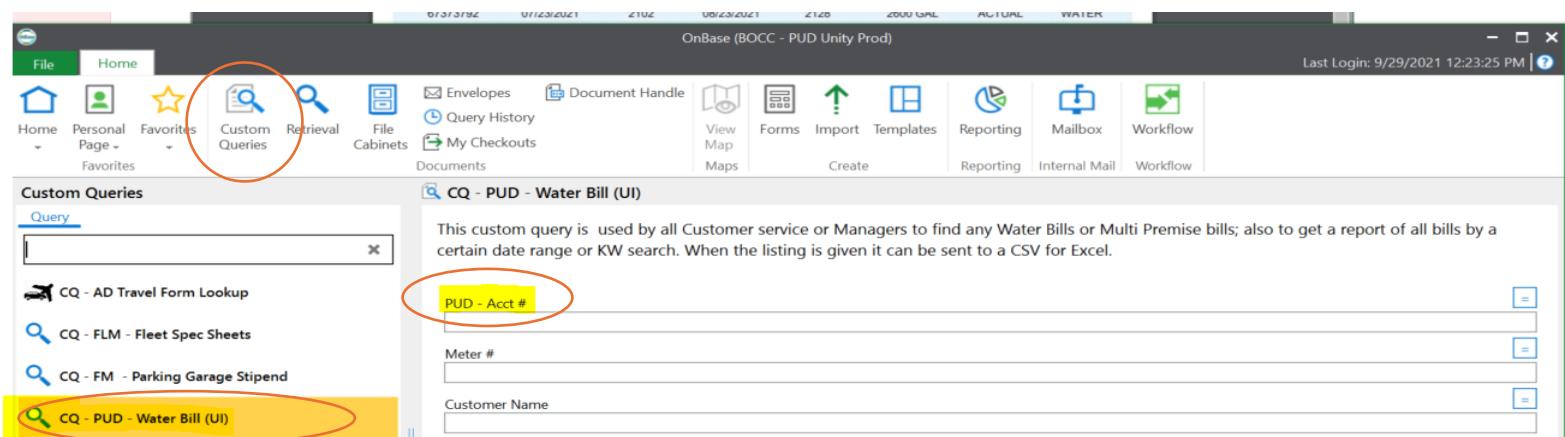
Consumption History

OnBase Bill View

If the **Display Bill** button doesn't work in CCS, enter information manually into OnBase to bring up the bill. This is the OnBase App home screen.



Click on **Custom Queries**, then **PUD Water Bill**, and enter the account number from CCS in the **PUD ACCT#** box.



Lastly, double-click the bill you would like to open.

Icon	Document Type	PUD - Acct #	Customer Name
<input type="checkbox"/> <input type="checkbox"/>	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
	PUD - WATER BILL	5055331354	EARL C GREY
<	PUD - WATER BILL	5055331354	EARL C GREY >

Chapter Eight: Bill Related

How to Read a Water Bill (Review)

In the first chapter of this training, we went over how to review a bill. Please complete the following activity as review:

[Kahoot: How to Read a Water Bill](#)

Pending Bill

A pending bill is when a customer hasn't received their bill statement.

Under Financial Information check for **Pending Bill Exists**

Financial Information

Current Balance \$0.00

Last Payment 08-03-2021, \$79.16

Last Billed 07-23-2021, \$149.16, Due Date 08-13-2021

Previous Bill 06-17-2021, \$34.71

Next Bill Date 09-20-2021

Pending Bill Exists 08-18-2021

1 Freezable Bill Segment(s) \$142.57

Check to verify there was a recent meter read.

If there is a recent meter read, send a To-Do to the Billing Department.

(see To-Do tab)

Measurements - Scalar ⓘ			
MEASUREMENT DATE/TIME	START DATE/TIME	READING VALUE	MEASUREMENT
07-28-2021 12:56:39PM EDT	06-26-2021 11:01:23AM EDT	6,602.000000	23,400.000000

Rebill

Rebill happens when the customer received their water bill, and IVR or IWR is showing a different amount owed or an additional amount after full payment was already made.

Review the account financial information:

1. Is there a **Bill Segment Cancellation**? This is a clue that a part of the bill was corrected or adjusted.

Account Financial History

Bookmark Clear Save Refresh

Main

ACCOUNT INFO		GULINO,ROBERT C JR, Residential, \$64.50		ACCOUNT ID	0841700000	SEARCH
	ARREARS DATE	FINANCIAL TRANSACTION TYPE	CURRENT AMOUNT	CURRENT BALANCE	PAYOUT AMOUNT	PAYOUT BAL
🔗	04-14-2022	Bill Segment Cancellation	\$-16.74	\$27.34	\$-16.74	
🔗	04-14-2022	Bill Segment	\$44.08	\$44.08	\$44.08	
🔗	03-30-2022	Pay Segment	\$-107.45	\$0.00	\$-107.45	
🔗	03-14-2022	Bill Segment	\$107.45	\$107.45	\$107.45	
🔗	02-28-2022	Pay Segment	\$-160.20	\$0.00	\$-160.20	
🔗	02-11-2022	Bill Segment	\$160.20	\$160.20	\$160.20	

2. Click on the **Bill Segment Cancellation** hyperlink to display the information for the rebill.
 - In the **Bill Segments** tab locate the billing line with the status Canceled. This will tell you what part of the bill was adjusted.
3. Click on the hyperlink with **Canceled** in it, and then click on the **Calc Lines** tab
(The next example shows the amount canceled was for the sewer SA's)

Bill

Bookmark Clear Save Refresh

Main Bill Segments Bill Routings Bill Messages Characteristics

BILL INFO Date: 04-14-2022, Complete, Due: 05-05-2022, \$44.08, Bill Cycle - 10 / 04-14-2022 BILL ID 084315364686

SA FILTER STATUS FILTER

Select All Clear All 0 NUMBER OF BILL SEGMENTS SELECTED

	PREMISE	BILL SEGMENT	CURRENT AMOUNT	STATUS	REMARKS
<input type="checkbox"/>	12504 VISION WAY, RIVERVIEW, FL, 33578, SFH (Sub SOUTH POINTE)	HCWRS / Water Residential, Frozen, Period: 03-09-2022 - 04-07-2022, \$27.34, 0841700001	\$27.34	Frozen	
<input type="checkbox"/>	12504 VISION WAY, RIVERVIEW, FL, 33578, SFH (Sub SOUTH POINTE)	HCWRS / Waste Water Residential, Frozen, Period: 03-09-2022 - 04-07-2022, \$33.45, 0841700456, Net Difference: \$16.71	\$33.45	Frozen	Rebilled after completion.
<input type="checkbox"/>	12504 VISION WAY, RIVERVIEW, FL, 33578, SFH (Sub SOUTH POINTE)	HCWRS / Waste Water Residential, Canceled, Period: 03-09-2022 - 04-07-2022, \$16.74, 0841700456, Net Difference: \$16.71	\$16.74	Canceled	Canceled after completion.

BILL SEGMENT ACTIONS

Bill Segment

Bookmark Clear Save Refresh

Main Items SQ Details Calc Lines Financial Details Bill Segment Messages Sub Bill Segment Usage Bill Segment Portal

BILL SEG INFO HCWRS / Waste Water Residential, Canceled, Period: 03-09-2022 - 04-07-2022, \$16.74, 0841700456, Net Difference: \$16.71 BILL SEGMENT ID 084291478010

BILL SEG HDR "1" of "1"

SEQUENCE	1	START DATE	03-10-2022	END DATE	04-07-2022	AMOUNT	\$16.74
DESC ON BILL		Wastewater Usage Charges	RATE VERSION	<input checked="" type="checkbox"/> Metered Wastewater Rate Schedule 06-01-2005			

CALC LINE CHAR	SEQUENCE	DESCRIPTION ON BILL	CALCULATED AMOUNT	PRINT	APPEARS IN SUMMARY
	1	Sewer Base Charge	\$16.74	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	2	Sewer Usage Charge	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

(The account example below had "3,100" gallons used. Sewer usage needs to be charged.)

Measurements - Scalar ⓘ							
MEASUREMENT DATE/TIME	START DATE/TIME	READING VALUE	MEASUREMENT	ADDITIONAL DETAILS	VALUE 1	VALUE 2	\
04-07-2022 8:12:11AM EDT	03-09-2022 8:07:52AM EST	7,552.000000	3,100.000000	Condition: Regular, Combined Multiplier: 100.000000	0.000000	0.000000	▲

4. The customer will then be rebilled after completion of the recalculation of the bill.

(The customer was rebilled for sewer-based and sewer usage charges based on corrected gallons used.)

Account Financial History							Bookmark	Clear	Save	Refresh
Main										
ACCOUNT INFO		GULINO,ROBERT C JR, Residential, \$64.50						ACCOUNT ID	0841700000	🔍
ARREARS DATE	FINANCIAL TRANSACTION TYPE	CURRENT AMOUNT	CURRENT BALANCE	PAYOUT AMOUNT	PAYOUT BALANCE					
∅ 05-13-2022	Bill Segment	\$71.91	\$71.91	\$71.91	\$-48.09					
∅ 05-13-2022	Bill Segment	\$33.45	\$0.00	\$33.45	\$-120.00					

How to Identify Payment Time/Type

When customers call in with bill questions, they might be confused on the time or date that the bill was paid. To ease confusion, it is helpful to be able to tell customers when and how the bill was paid.

To find the time or *how* a payment was made:

Start by going to the Account Financial History and clicking the **Pay Segment** for the bill in question.

Account Financial History						
Main						
Account Financial History ⓘ						
Search By Arrears Date ▾						
Expand Filters						
Arrears Date	Financial Transaction Type	Current Amount	Current Balance	Payoff Amount	Payoff Balance	
1 07-08-2024	Bill Segment	\$86.59	\$86.59	\$86.59	\$86.59	
2 07-08-2024	Late Payment Charge	\$5.09	\$0.00	\$5.09	\$0.00	
3 06-30-2024	Pay Segment	\$-106.99	\$-5.09	\$-106.99	\$-5.09	
4 06-06-2024	Bill Segment	\$101.90	\$101.90	\$101.90	\$101.90	
5 05-27-2024	Pay Segment	\$-85.58	\$0.00	\$-85.58	\$0.00	
6 05-07-2024	Bill Segment	\$85.58	\$85.58	\$85.58	\$85.58	
7 04-26-2024	Pay Segment	\$-83.56	\$0.00	\$-83.56	\$0.00	
8 04-05-2024	Bill Segment	\$83.56	\$83.56	\$83.56	\$83.56	
9 03-27-2024	Pay Segment	\$-101.90	\$0.00	\$-101.90	\$0.00	
10 03-07-2024	Bill Segment	\$101.90	\$101.90	\$101.90	\$101.90	
11 02-26-2024	Pay Segment	\$-55.28	\$0.00	\$-55.28	\$0.00	
12 02-07-2024	Bill Segment	\$55.28	\$55.28	\$55.28	\$55.28	
13 02-07-2024	Balance Transfer	\$0.00	\$0.00	\$0.00	\$0.00	
14 02-07-2024	Customer Service Setup Fee	\$25.00	\$0.00	\$25.00	\$0.00	
15 01-17-2024	Pay Segment	\$-25.00	\$-25.00	\$-25.00	\$-25.00	

Once you click the pay segment you will get to this screen, click on the drop down next the payment amount and click **Go To FTs on Payment**.

Payment Event						
Main	Tenders	Characteristics	Bookmark	Clear	Save	Refresh
Pay Event Info 06-30-2024, \$106.99			Payment Event ID ⓘ 216836338659			
Payment Date	06-30-2024	1 Payment(s)	\$106.99	Amount Tendered	\$106.99	
1 Payment(s)	\$106.99	1 Tender(s)	\$106.99			
Account Filter All	Search					
Payments						
	Account ID	Payment Amount	Payment Status	Match Type	Match Value	
+	2164550275 WHIGHAM,ASHLEE, Residential, \$86.59	\$106.99	Frozen			
		Go To FTs on Payment				

Click on the Pay Segment hyperlink

Financial Transactions on Payment

Main

FT Type	Accounting Date	Current Amount	Payoff Amount	Show on Bill	SA Information
Pay Segment	06-30-2024	\$-46.85	\$-46.85	<input checked="" type="checkbox"/>	HCWRS / Water Residential, W-MTR, Active, 01-19-2024, 21610797; Residential, \$86.59
Pay Segment	06-30-2024	\$-60.14	\$-60.14	<input checked="" type="checkbox"/>	HCWRS / Waste Water Residential, WW-MTR, Active, 01-19-2024, 2164550275 WHIGHAM,ASHLEE, Residential, \$86.59

Next to Freeze Date/Time, you will find the time a payment was made down to the seconds. Next to Frozen By will show the payment method.

Financial Transaction

Main **FT Process**

FT Type	Pay Segment	FT ID	* 216291495581			
SA ID	2161079785	Create Date/Time	06-30-2024 8:40:02PM			
Bill ID	216353656142	Accounting Date	06-30-2024			
Sibling ID	216457181760	CIS Division	HCWRS			
Parent ID	216598396520	GL Division	US Operation			
Frozen (Posted to Account)	<input checked="" type="checkbox"/>	Freeze Date/Time	06-30-2024 8:40:02PM			
Current Amount	\$-46.85	Payoff Amount	\$-46.85			
GL Distribution Status	Distributed	GL Extract Dates:	Scheduled			
			06-30-2024			
			Actual			
			07-01-2024			
	Sequence	Total Amount	Distribution Code	GL Account	Amount	Statistic A
+	1		AR-ENT	40102.000000.109301.0000.0000.00000000.0000000	\$-46.85	
+	2		CS-IWR1	80001.000000.101011.0000.9010.00000000.0000000	\$46.85	

Bill Cycle Change

Bill cycle change requests should be followed by negotiations on how to assist the customer in becoming current.

Don't send a "billing cycle" date request. Advise the customer that because we physically must send someone to read the meters, changing the billing cycle or due date is not an option.

To change their billing cycle, the entire neighborhood meter read date would have to be changed or we would have to send a meter reader on a separate date for just one customer which is not efficient for the company to do. Educate your customer about their billing cycle and ways to avoid late fees by paying before the due date instead of waiting for their next month's SSI check.

Example of a Billing cycle change request that was sent:

The customer stated that she needs her due date to be on the 11th because that's when she gets her social security check.

Her bill comes out on the 7th and is not due until the 28th and receives her SSI on the 11th.

- That means she already has her water bill when she gets her SSI check and had 17 days before her bill was due. There's no reason to change this.

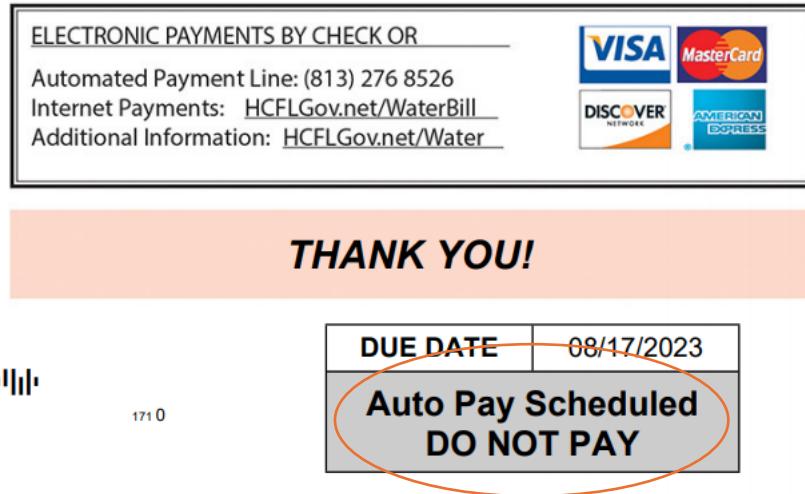
Financial Information ^

Current Balance \$0.00
Payoff Balance \$-120.00
Last Payment 07-18-2022, \$60.79
Last Billed 07-07-2022, \$60.79, Due Date 07-28-2022
Previous Bill 06-07-2022, \$50.60
Next Bill Date 08-05-2022

In summary, bill cycle changes are something we cannot do.

Remove Bill Message

This is referring to when a customer canceled their autopay and would like to have the **Auto Pay Scheduled DO NOT PAY** message removed from their bill as seen below:



Click on the **Bill Messages** tab

Click on the **trash can icon** to remove the message

The image shows a software interface for managing bill messages. At the top, there's a toolbar with buttons for Bookmark, Delete, Clear, Save, and Refresh. Below that, a navigation bar has tabs for Main, Auto Pay, Persons, Financial Balances, and Bill Messages (which is highlighted with a red circle). The main area displays account information: ACCOUNT MAMMOLA,JENNIFER D, Residential, \$64.24 and ACCOUNT ID 6409722936. A search bar shows 9 results. Below this, a table lists bill messages. The first row shows a plus sign, a trash can icon (circled in red), and the text "ACH". The second row shows a magnifying glass icon and the text "ACH Message". The third row shows a dropdown menu with "Permanent" selected.

	BILL MESSAGE	BILL MESSAGE TYPE
+	ACH	ACH Message
		Permanent ▾

Base Charges

The monthly charges for customers are generally composed of up to seven billing components based on the services provided:

Customer Service Charge-

The customer billing charge is derived by adding all of the costs for the Service Management & Accounting Group, reducing those costs by the amount of the special service charges generated by the Customer Accounting Support Section, and dividing that total net cost by the total number of bills projected for the fiscal year. Thus, the customer billing charge is the net cost for all Customer Accounting Support activities and is charged on every bill generated during the fiscal year.

Water Base Facility Charge-

The water base charge is designed to recover a portion of all fixed costs for the water system. Fixed costs include debt service, personnel costs and operating costs not related to the amount of water produced or treated.

Water Consumption Charges-

The water consumption charge includes all variable costs for producing and treating water and the remainder of the fixed costs not recovered through the water base charge. Water consumption charges are billed per 1,000 gallons of metered flow.

Wastewater Base Facility Charge-

The wastewater base charge is designed to recover a portion of the fixed costs for the wastewater system. Fixed costs include debt service, personnel costs and operating costs not related to the amount of wastewater treated and effluent disposal.

Wastewater Consumption Charge-

The wastewater usage charge includes the variable costs of treating and disposing of wastewater and includes the balance of the fixed costs not recovered through the wastewater base charge. Wastewater usage charges are billed per 1,000 gallons of metered water flow and are capped at 8,000 per month on accounts read monthly and at 16,000 on accounts whose meter is read every other month.

Reclaimed Water Capital Charge-

Reclaimed water capital charges pay for the cost of constructing reclaimed water facilities and are charged monthly to each water and wastewater connection, based on ERC's.

Reclaimed Water Consumption Charges-

The reclaimed consumption charge is designed to recover a portion of all variable costs for producing and treating the reclaimed water. Residential reclaimed water customers without a reclaim meter are billed at a flat rate. Others pay base facility and usage charges.

Other Charges

	New Charges	Old Charges
Emergency Turn Off	\$35.00	\$30.00
Emergency Turn Off (After Hours)	\$52.50	\$45.00
Re-Read Customer Request	\$25.00	\$20.00
Interrupt Services Water	\$25.00	\$15.00
Interrupt Services Wastewater Only	Actual Cost	
Service Reconnect Water(Next working day)	\$25.00	\$15.00
Same Day Service Restoration	\$35.00	\$30.00
Remove Unauthorized Connection (Straight Connection)	\$200.00	\$100.00
Example of Severance Reconnect Request		
(Next Day)	New Charges	Old Charges
Pre-tag Notice Attempt	\$10.00	\$10.00
Severance Disconnect	\$25.00	\$15.00
Severance Reconnect	\$25.00	\$15.00
	\$60.00	\$40.00
(Same day Reconnect)	New Charges	Old Charges
Pre-tag Notice Attempt	\$10.00	\$10.00
Severance Disconnect	\$25.00	\$15.00
Same Day Severance Reconnect	\$35.00	\$30.00
	\$70.00	\$55.00
Example of New Customer Start Service Same Day Request		
Customer Service Setup Fee	\$25.00	\$25.00
Same Day Reconnect	35.00	\$30.00
	\$60.00	\$55.00

Set-Up, Update, and Cancel AutoPay

Autopay can only be accessed by the customer. CSR cannot set up or make changes to customer autopay.

Set-up, updates, or cancellations:

- Set-up is only available on the IWR (govone.com/waterbill) system.
- Changes including updates and cancellations can be done by the customer through IWR and IVR systems.
- Updates take 1 full billing cycle (30 days) before it is processed from the new autopay source.
- No other department can set up the autopay either, and autopay is self-service only.

The customer is requesting to update autopay:

- Advise the customer they need to cancel autopay to avoid bills being drafted from old banking/card information.
- Advise the customer that they will have to wait 24 hours to update autopay with new information.
- Advise the customer that autopay can take one full billing cycle before the system drafts from updated information, so any pending bills should be paid manually.

- **Home:** Takes you to the Home page from wherever you are.
- **Profile:** Here you can change your password. Edit your Paperless Billing option. Sign up for or update Recurring Auto Payment. You can edit your mailing address, phone numbers, and email address. ([Page 7](#))
- **Payment:** Make a one-time Credit Card or ACH (bank account) payment. Sign up for or update Recurring Auto Payment. View your Payment History. Request a Payment **Extension.** ([Page 8](#))
- **FAQ:** May contain helpful information related to your Utility Services.
- **Logout:** Closes session.

[Home](#) [Profile](#) [Payment](#) [FAQ](#) [Logo](#)

View or Pay Your Water Bill

Home / View or Pay Your Water Bill

HCPUD Account Number: 5536700000

Account Balance

Balance Due

Your current balance due is \$0.00

Credit Card Bank Account Recurring

Water Bill

View Bill

View Pay History

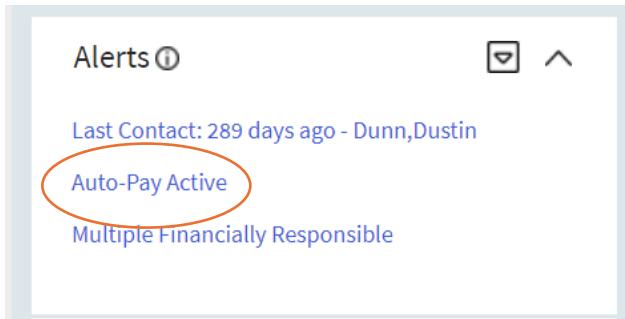
Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8

Borough County Florida

f t g i l

Locating AutoPay

In the Alerts locate the **Auto-Pay Active** hyper-link



Click on the **Auto-Pay Active** hyperlink

The screenshot shows the 'Account' screen with the 'Auto Pay' tab selected. At the top, there are buttons for 'Bookmark', 'Delete', 'Clear', 'Save', and 'Refresh'. Below the tabs, the account information is displayed: ACCOUNT MAMMOLA,JENNIFER D, Residential, \$64.24 and ACCOUNT ID 64097. The 'ACCOUNT AUTO PAY' section contains fields for 'START DATE' (04-24-2020), 'END DATE' (empty), 'AUTO PAY SOURCE' (HC-APCC, highlighted with a red oval), 'EXTERNAL ACCOUNT ID' (19582637), 'EXPIRES ON' (empty), 'NAME' (MAMMOLA,JENNIFER D), and 'MAXIMUM WITHDRAWAL AMOUNT' (\$0.00). A search bar next to the 'AUTO PAY SOURCE' dropdown shows the text 'Hillsborough - AP - Credit Cards'.

It will bring you to the page seen above, where you can see when auto pay was set up and what the auto payment method is.

For autopay there are going to be two options, it will either say:

- Hillsborough-AP- Credit Cards or
- Hillsborough-AP-Checking

Late Fee Waiver Qualifications

Collection & Severance Process – Single Family Residential Customer

When a customer does not pay their one-month bill by the Due Date, the system will create a **Collection Process** which is made up of two events:

- Event # 1: Negative Ding on the customer's credit score (which is Completed immediately)
- Event # 2: Postcard mailing and posting of 5% "late" fee (which is completed immediately)

Waiver of Late Fee Process

Waiver of the 5% late fee may be considered under the following conditions:

- The person making the decision must be at a CSR2 level or higher and have completed initial probation.
- CSR2's who are on initial probation need approval from either a team lead or a supervisor.
- Process: if the customer is eligible for a waiver, CSR2 will send a “To Do” to the accounting supervisor to waive the late fee. **(see To-Do Tab)**

Eligibility/Guidelines for Waiver of Fee

Accounts Eligible for a Waiver

- CSR2 may make a 1x exception to waive the collection fee once every 12 months
- The customer must have at least 6 months of payment history to be considered for exception
- A fee has not been waived previously
- Customers who are Returning/Transferring service or requesting additional service and fee was incurred due to incorrect mailing address (CSR error)
- Customers on a fixed income such as a monthly Social Security check and bill due date does not coincide with a monthly check may receive a 1x waiver

Accounts Ineligible for Waiver

- The service charge has been waived previously.
- Payment arrangement, the customer was set up on a payment plan or arrangement for the current balance and did not keep the agreement.

Internal Issues: (CSR2 must check with their manager first for reported issues)

- If staff is notified of a current internal issue related to CCS, Billing/Pay Point (Payments Team), IVR, or IWR that may trigger a collection fee to be incurred not of customer's fault, then CSR2 may waive the late fee. (**Must have received specific information from management related to the problem to waive the fee.**)
- If no known internal issues, then staff must send to supervisor request to review.

Possible Dead Meter

The customer calls to inquire why their bill is low or "0" usage



Hillsborough
County Florida

CUSTOMER NAME	ACCOUNT NUMBER	BILL DATE	DUUE DATE
RALPH N AVERSA	7357500000	05/25/2021	06/15/2021

Service Address: 5820 HAWKWOOD CT

5-Page 1 of 1

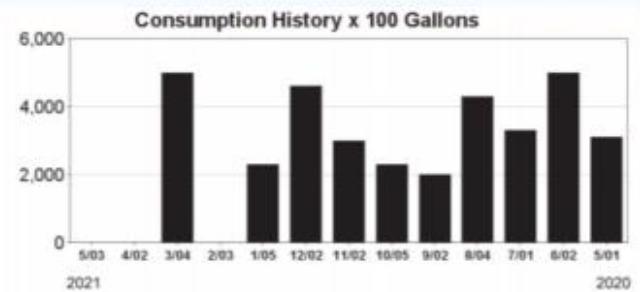
METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION	READ TYPE	METER DESCRIPTION
73347472	04/02/2021	12080	05/03/2021	12080	0 GAL	ACTUAL	WATER

Service Address Charges

Customer Service Charge	\$4.69
Water Base Charge	\$9.76
Sewer Base Charge	\$15.77
Total Service Address Charges	\$30.22

Summary of Account Charges

Previous Balance	\$30.22
Net Payments - Thank You	\$-30.22
Total Account Charges	\$30.22
AMOUNT DUE	\$30.22



Click on the meter reads

- If there are a lot of "0" usage months and office estimates, this is a possible dead-meter.
- If the customer lives in the home, create a premise investigation for a possible dead meter. (see Field Activity tab)

Create a follow-up to verify if the meter is dead to back-bill the customer for usage.

MEASUREMENT DATE/TIME	START DATE/TIME	READING VALUE	MEASUREMENT	ADDITIONAL DETAILS
06-02-2021 12:00:00AM EDT	05-03-2021 12:01:00AM EDT	12,230.000000	5,000.000000	Condition: Office Estimate - Custom , Comt
05-03-2021 12:50:14PM EDT	04-02-2021 2:51:13PM EDT	12,030.000000	-5,000.000000	Condition: Regular , Combined Multiplier: 1.000000
05-03-2021 12:01:00AM EDT	04-02-2021 12:00:00AM EDT	12,180.000000	5,000.000000	Condition: Office Estimate - Custom , Comt
05-03-2021 12:00:00AM EDT	04-02-2021 2:51:13PM EDT	12,080.000000	0.000000	Condition: Office Estimate - Custom , Comt
04-02-2021 2:51:13PM EDT	03-04-2021 10:55:06AM EST	12,080.000000	0.000000	Condition: Regular , Combined Multiplier: 1.000000
04-02-2021 12:00:00AM EDT	03-04-2021 10:55:06AM EST	12,130.000000	5,000.000000	Condition: Office Estimate - Custom , Comt
03-04-2021 10:55:06AM EST	02-03-2021 12:28:35PM EST	12,080.000000	5,000.000000	Condition: Regular , Combined Multiplier: 1.000000
02-03-2021 12:28:35PM EST	01-05-2021 11:18:50AM EST	12,030.000000	0.000000	Condition: Regular , Combined Multiplier: 1.000000

Meter Misread

Misreads/Bad Meter Reads (Including COT)

- When a customer calls about their meter reading being too high or low and the customer can (or already has) read their meter, we will use the customer's read. Since they have re-read the meter for us, there is no need to send field service back out to re-read the meter.

The customer provides a meter read that is lower than the last read: Customer read: (16259/10), last read: (16392/00)

- If the meter was misread or the system estimate was over-estimated, send a **To-Do** to the Billing Department to correct the bill.
- Set an alert to follow up with the customer after the bill is corrected.

The customer does not have a read and requests PUD to re-read the meter:

- The CSR should attempt to get the customer to read the meter themselves while they are on the phone with them.
- If the customer can't or refuses, a Premise Investigation FA is created. (Don't set up for Fridays/Same Day)
- CSR should create an electronic Reminder to themselves with a trigger date of 2-3 days out to check the PI (Premise Investigation) results and follow-up with the customer.
- If Premise Investigation confirms a misread, the CSR will send a manual **To-Do** to the Billing Department to process a re-bill. (see To-Do tab)

High Usage After Meter Change Out

The customer's old meter was upgraded or replaced due to a dead meter. The customer's new bill is high based on the last read on the old meter. (not an estimated bill)

Old meter example:

- The customer's normal average usage is 4,100g for a full month.
- The customer's final read on the old meter was 28,000g for 9 days.

11-24-2021 7:00:00AM EST	11-15-2021 12:28:56PM EST	11,749.000000	28,000.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000
11-15-2021 12:28:56PM EST	10-14-2021 12:48:17PM EDT	11,469.000000	4,700.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000
10-14-2021 12:48:17PM EDT	09-15-2021 9:22:06AM EDT	11,422.000000	3,200.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000
09-15-2021 9:22:06AM EDT	08-16-2021 3:41:02PM EDT	11,390.000000	4,300.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000
08-16-2021 3:41:02PM EDT	07-16-2021 9:08:33AM EDT	11,347.000000	3,500.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000
07-16-2021 9:08:33AM EDT	06-16-2021 11:50:20AM EDT	11,312.000000	3,900.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000
06-16-2021 11:50:20AM EDT	05-17-2021 9:53:12AM EDT	11,273.000000	3,600.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000

New meter example:

- The customer's new meter usage is 2,900g for 22 days.
- Usage is back to normal.

Measurements - Scalar

MEASUREMENT DATE/TIME	START DATE/TIME	READING VALUE	MEASUREMENT	ADDITIONAL DETAILS	VALUE 1	VALUE 2	VALUE 3	VALUE 4
gal								
12-16-2021 10:21:37AM EST	11-24-2021 7:01:00AM EST	29.000000	2,900.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000	0.000000	0.000000
11-24-2021 7:01:00AM EST		0.000000	0.000000	Condition: Regular , Combined Multiplier: 100.000000	0.000000	0.000000	0.000000	0.000000

The new meter reading available (actual read): Use the current read to verify if the customer is having high usage.

- If new meter usage is high, then the customer will have to investigate what is causing the high usage
- If new meter usage is normal, then accounting will review for possible old meter final read misread.
 - Send To-Do to Accounting to reverse the final read on the old meter. (see To-Do tab)
 - Don't tell the customer that the bill will be adjusted; only that it will be reviewed.
 - CSR needs to set up follow-up triggers and update the customer on the outcome.

The new meter read is not available:

- Customers can provide a read on the new meter or can wait until the next read is available to review if the final read on the old meter needs to be reviewed.

System Estimate

The system uses the following methods for creating System Estimates (in order of priority):

First, the system looks back to the same month one year ago (for the same customer) and uses that consumption.

If there is no read for this customer a year ago, the system will use the current year's prior month's actual usage to estimate.

- Example: If estimating August 2017 read, and the customer was not at the premise in August 2016, the system will use the July 2017 usage for the estimate.

If there is no previous month's actual usage for this customer at the premise, the system will use the Trend Area to estimate.

- Example: If estimating August 2017 read, and the customer started service in Mid-July, no prior month read is available to use to estimate. The system will use the Trend Area's average for estimating.

Trend Areas are broken up into four major customer areas:

1. Central
2. City of Tampa
3. North
4. South

System Estimate example:

Measurements - Scalar [①](#)

MEASUREMENT DATE/TIME	START DATE/TIME	READING VALUE	MEASUREMENT	ADDITIONAL DETAILS
07-15-2021 12:00:00AM EDT	06-15-2021 9:21:17AM EDT	16,392.000000	29,200.000000	Condition: System Estimate , Combined Multiplier: 100.000000

The customer wants the bill to be corrected based on their actual usage, and not the system estimate:

- Advise the customer the system will automatically correct itself next month if we have over-estimated their usage.
- If the customer doesn't want to wait for next month's bill, the customer can provide an actual read (from their meter) to see if we over-estimated usage.

If the customer's read is lower than the estimate, CSR can send To Do to **Billing** to correct the bill. ([see To-Do tab](#))

Water Usage Calculator

If a customer calls and wants to know how much filling their pool is going to cost, or what their irrigation might run them, we have a water usage calculator available on the hcfl.gov site. When you pull it up, this is what it looks like.

Water Bill Calculator

CHARGES DESCRIPTION	Gallons Used *	Calculate
Customer Bill Charge	0	\$5.63
Water Base Facility Charge		\$11.70
Purchased-Water Pass-Through Consumption Charge	0	\$0.00
Water Usage Charges		
0 - 5,000 Gallons	0	\$.96
5,001 - 15,000 Gallons	0	\$2.66
15,001 - 30,000 Gallons	0	\$4.47
30,001 or More Gallons	0	\$6.66
Water Total		\$17.33
Wastewater Base Facility Charge		\$18.91
Wastewater Usage Charge (Capped @ 8,000GPM)	0	\$0.00
TOTAL BILL:		\$36.24

<https://publicsolutions.hillsboroughcounty.org/enterprise/f?p=189:1>



2023 Water Bill Calc
Effective 10.1.23.xlsx

For other calculations like these below, we have an excel spreadsheet (for us)

- Water only calculator
- Sewer only calculator
- Water & sewer plus reclaim meter calculator
- Water & sewer plus irrigation meter calculator

Chapter Nine:

Paperless

Verifying Paperless

Click on the **Account Hyperlink** under the current context



Locate **Bill Print Intercept**

- If it's empty, the customer will get a bill by mail to the address on file.
- If "IWR" is in the box, the customer is set up for paperless billing and will get an email notification when the bill is ready to view.

The screenshot shows the 'Account' edit screen. The 'ACCOUNT' field contains 'HERRING,TORIN, Residential, \$0.00'. The 'ACCOUNT ID' field is '2661976170'. The 'BILL PRINT INTERCEPT' field is highlighted with a red oval and contains 'IWR'.

Although customers have the ability to remove paperless billing on their online account, as a CSR removing paperless billing is done in 3 steps.

Current Context

RODRIGUEZ,EDWIN

7146970467 1
RODRIGUEZ,EDWIN,
Residential, \$0.00

11741 LYNN BROOK CIR,
SEFFNER, FL, 33584, SFH
(Sub HILLCREST
SUBDIVISION)

Select the **Account Hyperlink** from the Current Context section in the Dashboard (as shown below)

1. From the main tab, check the **Bill Print Intercept** in the middle of the screen. If it says IWR- remove it.

Account

Main Auto Pay Persons Financial Balances Bill Messages C & C Budget Deposits Character

ACCOUNT HERRING,TORIN, Residential, \$0.00 ACCOUNT ID 2601976170

SET UP DATE 06-03-2015 CURRENCY CODE United States Dollars

CUSTOMER CLASS Residential ACCESS GROUP *** System Default

CIS DIVISION HOWRS PROTECT CIS DIVISION

MANAGEMENT GROUP

COMMENT

BILL CYCLE Default Bill Cycle BILL AFTER

PROTECT BILL CYCLE BILL PRINT INTERCEPT IWR IWR User, SPL

MAILING PREMISE ID 2502 CUMBERLAND CLIFF DR, RUSKIN, FL, 33570, SFH (Sub RIVERBEND PHASE 2) PROTECT MAILING PREMISE

2. Select the Persons Tab at the top of the screen and look for the **Bill Routing Type**. If it shows **Route via email**, select the drop down and change to **Route via postal service** as shown in the 2 boxes below.

The screenshot displays two identical 'Bill Routing Information' forms side-by-side. Both forms include fields for 'Receives Copy of Bill' (checked), 'Bill Format' (set to 'Detailed'), 'Number of Bill Copies' (set to 1), and 'Customer PO ID' (empty). The key difference is in the 'Bill Route Type' dropdown: the first form has it set to 'Route via email', while the second form has it changed to 'Route via postal service'. A large blue curved arrow is positioned between the two forms, pointing from the first one to the second one.

3. Select the Characteristics Tab and confirm that **Email Notifications** is listed as “I” for inactive. If it has an “A”, for Active, change it. Click Save in the top right corner.

The screenshot shows a software interface with a navigation bar at the top containing tabs: Main, Auto Pay, Persons, Financial Balances, Bill Messages, C & C, Budget, Deposits, Characteristics (which is highlighted with a red oval), Alerts, and Account Portal. Below the navigation bar, there is account information: 'Account' followed by 'LACK, ABBY, Residential, \$0.00' and an 'Account' button. The main area features a table with columns for 'Effective Date', 'Characteristic Type', and 'Characteristic Value'. The 'Characteristic Type' dropdown is set to 'Email Notification Characteristic type'. The 'Characteristic Value' input field is highlighted with a yellow box. There are also '+' and '-' buttons, and a calendar icon next to the effective date.

If all of these steps are not completed, the customer will still get email notifications without a paper statement, and most likely result in an upset customer calling back next month.

Email Notification

All email notifications should be discontinued via the IWR System by the customer. CSRs should always advise the customer to register their account online and OPT out of paperless billing.

For escalations: CSR can remove paperless billing, however, it is strongly encouraged to have the customer process any updates on their IWR account. Removal is changing the characteristic on the account tab from active (A) to inactive (I) and changing the **Bill Route Type** on the Person tab to “Route via postal service”.

When entering an “A” or “I” to activate or deactivate the email notification on a customer account, please make sure that you are using **Capital letters only**, and ONLY using “A” for active or “I” for inactive. No other letters should be used.

By deviating from this, it prevents the customers from being able to access their account on the IWR and from paying on the IVR. It puts them in a loop and causes great frustration.

Effective Date	Characteristic Type	Characteristic Value
* 08-15-2022	* Email Notification Characteristic type	I
* 06-17-2022	* Email Notification Characteristic type	A
* 05-01-2022	* Email Notification Characteristic type	A

Bill Print Intercept

This feature is used to prevent a bill from being sent to the customer or for the customer to view it on the website. This function is used by a variety of teams. A record of the bill is still created in CCS, but is not released. An automated process identifies all intercepted bills for the current batch, and an email is generated from CCS to the Data Integrity managers for action the next day. The managers distribute the information via email to each person who had accounts with intercepts on them.

For new customer account setup: CSRs should be enrolling new customers in paperless billing when *starting* an account. CSRs should be selecting “Route via email” in the Persons tab at account setup and advising customers of paperless/email bill delivery. CSRs should be advising customers to Register their account and the option of OPTING out of paperless billing is available.

The screenshot shows the 'Account' setup page in CCS. The top navigation bar includes 'Main' (which is selected), 'Auto Pay', 'Persons', 'Financial Balances', 'Bill Messages', 'C & C', 'Budget', 'Deposits', and 'Characteristics'. The main form fields include 'Account' (WHIGHAM,JUDY, Residential, \$76.52), 'Set Up Date' (07-18-2014), 'Currency Code' (United States Dollars), 'Customer Class' (Residential), 'Access Group' (***), 'CIS Division' (HCWRS), 'Protect CIS Division' (checkbox), 'Management Group' (dropdown with a search icon), 'Comment' (text area with a pen icon), 'Bill Cycle' (Bill Cycle - 20), 'Protect Bill Cycle' (checkbox), 'Mailing Premise ID' (2645120829, with address details: 12006 FERN BLOSSOM DR, GIBSONTON, FL, 33534, SFH (Sub SOUTH BAY LAKES PH 1 AKA VOGEL)), 'Bill After' (dropdown with a calendar icon), 'Bill Print Intercept' (checkbox, highlighted with a red oval), and 'Protect Mailing Premise' (checkbox).

Chapter Ten: Payments

Payment Reversals

Payment reversal is for a payment that was made in error, or a turn-on request canceled before it was completed.

Payments that don't qualify for reversal

- AMSCOT, cash payments, lockbox, and money order.
- Payments made through the cashier can't be reversed.
 - CSR will need to send **To-Do** to Accounting to have them issue a refund for payment. (see **To-Do tab**)

Payments that can be reversed

- The payments team can reverse IVR, IWR, Recurring/Auto Pay payments, and E-Box payments.
 - **Credit Cards** may be reversed up to 365 days from the date of payment.
 - **ACH Auto Payments** or E-Checks may be reversed up to 90 days from the date of payment.
 - **E-Box** payments may be reversed up to 180 days from the date of payment

Hold time before payment can be reversed (from the date payment was made)

- No hold time for a Credit card, E-box, and autopay credit card payments.
- 10 business days hold for ACH electronic payments and ACH Autopay.
 - If the customer is irritated about ACH wait time, you can send an email to payments to review for managers' exception.

When sending payment inquires to the payments team, please send them to **WRS-Payment Leads**.

Returned Payment Fees

If a check or ACH payment is "dishonored" by the customer's bank, the payments section will process the returned payment per departmental policy. Checks that do not clear the first time are automatically resubmitted a second time by our bank unless they are coded "account closed" or "stop payment". ACH payments that do not clear are **not** resubmitted. Service will be interrupted without written notice when the bank returns the payment.

- The customer must pay by cash, credit card, or money order to cover the amount of the returned check, service charge, and any applicable reconnection service charges.
- A "cash only" status *may be* entered into the account. (**see the Cash Only section**)

The following fees will be charged based on the amount of the returned check:

- \$25.00 (\$0.00 - \$50.00)
- \$30.00 (\$50.01 - \$300.00)
- \$40.00 (\$300.01 - \$800.00)
- 5% of face value (\$800.01 & over)

If the customer wishes to pay in advance to cover a check that has not been returned yet:

- Customer must pay the returned check amount, plus service charge in cash or money order, in the office.
- Customer must advise the cashier that they are covering a check that will be returned so that:
 - the tagging fees will be waived and;
 - the door is not tagged

Service will not be interrupted, but the customer will still have the cash-only status. This transaction will show as a "returned check" when the check comes back.

Payment Cancellation

Financial Information ^

Current Balance \$64.24

Last Payment 06-21-2022, \$113.23

Last Billed 07-11-2022, \$64.24, Due Date 08-01-2022

Previous Bill 06-09-2022, \$113.23

Next Bill Date 08-09-2022

AutoPay Will Be Created On 07-20-2022

Click on **Current Balance** on the Financial Information dashboard

Click on the icon on the left side of the Pay Segment Cancellation

Account Financial History

Main

ACCOUNT INFO MAMMOLA,JENNIFER D, Residential, \$64.24 ACCOUNT ID 6409722936

ARREARS DATE	FINANCIAL TRANSACTION TYPE	CURRENT AMOUNT	CURRENT BALANCE	PAYOUT AMOUNT	PAYOUT BALANCE
02-16-2021	Pay Segment Cancellation	\$91.98	\$91.98	\$91.98	\$91.98

Click on the Tenders tab and locate the **Tender Action**

Payment Event

Main Tenders Characteristics

AUTO PAY SOURCE HC-APCC Hillsborough - AP - Credit Cards
EXTERNAL ACCOUNT ID ****2637
EXPIRES ON /
NAME MAMMOLA,JENNIFER D
BILL ID 640539433439 Date: 02-09-2021, Complete, Due: 03-02-2021, \$91.98, Bill Cycle - 07 / 02-09-2021
MICR ID EXT. REFERENCE ID
CUSTOMER ID NAME
TENDER CONTROL ID 6836516063 02-23-2021,Auto Pay Account,Balanced
 INCLUDED IN TENDER CTL BALANCE
DEPOSIT CONTROL 02-23-2021,Auto Pay,Balanced
TENDER ACTION Cancel

	CHARACTERISTIC TYPE	SEQUENCE	CHARACTERISTIC VALUE
+	Tender Reversal Code	10	Auto Pay failed getting to PayPoint; Letter notification mailed to customer 9/24/21.

Missing or Misapplied Payments

For any payment disparities such as missing payments or misapplied payments, the request to research needs to be sent to the Payments Department by email. ([see email tab](#))

MISAPPLIED PAYMENTS

(Initiated by the customer with multiple accounts)

- Check Payment History
- Confirm payment was applied to wrong account
- Send email for payment transfer to the Payment department

Information needed to research payment

- Have the customer verify the payment was processed and posted to their bank.
- Ask how payment was made (IWR/IVR/autopay/Amscot), the amount paid, and the date of payment.
- Ask for confirmation number (IVR or IWR), last four of card issued, or check number if available.
- If payment is made by EBOX: we can search by amount and date
- If payment is made by mail or lockbox: the customer needs to provide a copy of the back of the check
- Send an email to the Payments Department.

Credit Card Eligible/Cash Only

Cash Only - No E-checks, Bank Bill-Pay, or checks

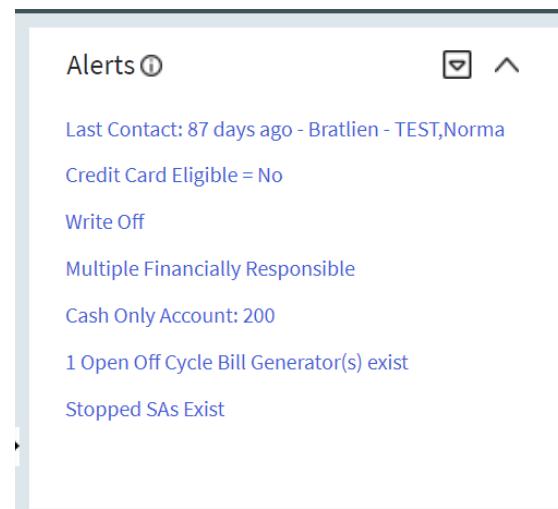
Credit Card Eligible=No - No credit card or debit card payments

Unless the account has been set up for permanent cash-only restriction due to repeated returned payments, the customer will remain cash-only for 12 months.

A customer is placed on “Cash Only” when they have had two checks returned from their bank within twelve months.

- When the account is on “Cash Only” status, we cannot accept anyone’s check for payment on the account. However, if a church or other social services agency wants to pay the bill for the customer, the Payments Supervisor has the authority to accept such a check.
- Stop Payments are treated like an NSF check unless a Payments Supervisor makes other arrangements with the customer.

Note: A “Cash Only” customer can apply for ACH so long as the cash-only status was not caused by an ACH NSF.



Exceptions to cash-only status:

- Bank Error – the customer must provide written documentation on bank letterhead admitting their error.
- Robbery – the customer must provide a copy of the police report showing that their checkbook and (or) wallet were stolen.

Cash only and Credit Card Eligible related to a returned payment = Payments Department

Cash only and Credit Card Eligible related to a Lien = Credit Management Department

Chapter Eleven: Pay Plans

Pay Plan vs. Pay Arrangements

Pay Plan

- Designed to alleviate temporary difficulties or short-term situations.
- Customer agrees to make specific payments on user-defined dates that are independent of billing dates.
- Current balance and payoff balance are unaffected.
- While the Pay Plan is active, the Account Debt Monitor “ignores” the SA’s aged debt.
- Pay Plan is broken by CCS if payments aren’t received as scheduled. Payment dates and amounts can be changed after the Pay Plan is created.
- If payments have been received for all of a plan’s scheduled payments, the pay plan’s status becomes kept.
- If a payment cannot be found for a scheduled payment, the pay plan’s status becomes broken and the debt owner’s account is marked for review by the account debt monitor.

Payment Arrangement

- Designed for severely overdue debt or back billing amounts that need to be spread out over time for the customer.
- Customer pays off their debt in billed installments. Their bills contain the payment arrangement amount until the debt is paid off.
- Once the debt is transferred to the PA SA, the current balance becomes \$0 and payoff balance reflects all the debt owed.
- Creates a Payment Arrangement SA which closes once the debt is paid off.
- If the customer falls behind with their regular service, you can transfer additional debt to the payment arrangement.
- You can adjust the monthly payment, or installment amount, as needed.
- Account can be set for ACH.
- If the Payment Arrangement is broken, all of the remaining debt is redistributed to their prospective SAs.

Pay Plan Requirements

CSRs are encouraged to authorize and create Pay Plans for customers who are not able to pay the balance due on their accounts by their due date.

- Keep in mind setting up a Pay Plan will not waive late fees. Let the customer know late fees will still apply
- The payment plan needs to be set for full balance by the next bill print.

Credit Rating Guidelines:

- 550-790 credit rating needs to have a deposit to cover the full balance owed.
- 790-1000 credit rating doesn't require a deposit on file

Customer Information (Map Zone)		<input type="checkbox"/>	<input type="checkbox"/>
ACCOUNT ID	9319122148	(	
MAIN CUSTOMER	GREEN,AALEYA - Home Phone:(813) 407-3531	(	
SET UP DATE	11-15-2018		
CIS DIVISION	HCWRS		
CUSTOMER CLASS	Residential		
BILL CYCLE	Bill Cycle - 15		
CURRENT CREDIT RATING	720		
NEXT CREDIT REVIEW DATE	07-19-2022		
HOME PHONE	(813) 407-3531		
SOCIAL SECURITY	() *****5515		
EMAIL ADDRESS	mishafoxx@yahoo.com		

Accounts Ineligible for a Pay Plan:

- Waste Water only (note account, pay plan is not required)
- 1-month bill (note account, pay plan is not required, but a late fee will apply)
- The account's credit score is below 550
- Length of service: Set up date is less than 6 months
- Modify an Active Pay Plan or Pay Arrangement that exists on the account (transfer to credit management)
- Account has an active severance process (transfer to credit management)

Customer Requested Escalation Process:

Customers that do not meet the criteria **should not** be referred directly to Credit Management.

- Customers not meeting the eligibility criteria will be advised that the full amount is due and payable by the due date.
- Escalated calls, generated at the customer's request, should be referred to a analyst.
(unless there was an error in the initial CSR review the analyst will advise the customer of the due date and amount).
- Escalation requests by a analyst should be referred to the Call Center Supervisors. They will make individual decisions and note the account.

**Credit Management will periodically review the exception total and criteria **

Credit Rating

This information is for internal use only. No credit rating information will be shared with customers or external sources like a credit bureau.

- Used to review accounts for a payment plan eligibility
- Used to waive additional deposit or credit back deposit paid on active accounts
- 1000 is the perfect payment history
- Under **Customer Information** on the main page

Customer Information (Map Zone)

▼ ^

ACCOUNT ID	6409722936 ▼
MAIN CUSTOMER	MAMMOLA,JENNIFER D - Home Phone:(925) 878-5602 ▼
SET UP DATE	07-14-2017
CIS DIVISION	HCWRS
CUSTOMER CLASS	Residential
BILL CYCLE	Bill Cycle - 07
CURRENT CREDIT RATING	1000
NEXT CREDIT REVIEW DATE	08-02-2022
AUTO PAY SOURCE	Hillsborough - AP - Credit Cards
CELL PHONE	(925) 878-5239
SOCIAL SECURITY ⓘ	*****4245
EMAIL ADDRESS	davidmammola@hotmail.com

Set Up Pay Plan

Under **Favorite Links**, there's a Pay Plan hyperlink.

Favorite Links ^

- To Do + [1]
- Customer Contact + [2]
- Pay Plan +** [3]
- Online Utility Exchange [4]
- IWR Website [5]
- Water Wastewater Provider [6]
- Property Appraiser Website [7]
- Watering Restrictions [8]
- Solid Waste [9]
- CAMS
- BI Publisher

Financial Information ^

Current Balance \$278.47

  Payoff Balance \$98.47

Last Payment 04-18-2022, \$119.16

Last Billed 07-13-2022, \$278.47, Due Date
08-03-2022

Previous Bill 06-13-2022, \$201.14

Next Bill Date 08-11-2022

Information needed to set up a payment plan is found within the **Financial Information**

Type- Residential Payment Plan

Schedule amount- Full balance owed

Schedule date – Before “next bill date” (business day)

Pay Plan example below:

Pay Plan

Bookmark Clear Save Refresh

Main

PAY PLAN

PAY PLAN ID

	SCHEDULED DATE	SCHEDULED AMOUNT
<input type="button" value=""/> <input type="button" value=""/>	08-10-2022 <input type="button" value=""/>	278.47

ACCOUNT ID 7433244415 JONES, COLLETTE, Residential, \$278.47

STATUS Active

CREATED BY JCARROLL

LAST UPDATED BY

TYPE RES Residential Payment Plan

DEBT CLASS Standard utility debt

CURRENT BALANCE 278.47

DELINQUENT DEBT 201.14

THIRD PARTY PAYOR

PAYOR ACCOUNT ID 7433244415 JONES, COLLETTE, Residential, \$278.47

START DATE 07-19-2022

PAY METHOD By Mail

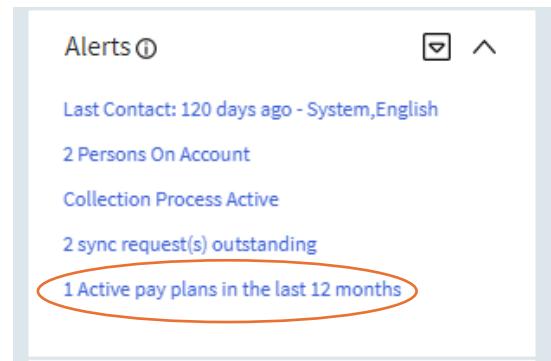
TOTAL AMOUNT 278.47

COMMENTS

Active Pay Plan

If there is an active payment plan, the CSR will need to review the information to provide the most accurate information to the customer regarding the amount due.

- CSR can't modify or cancel the active pay plan.



Standard pay plan (set up by customer service or credit management)

- If there's an active standard payment plan, the customer will have to pay as agreed in the active pay plan. If the customer can't keep the payment plan, then the CSR can transfer to credit management for further assistance.

The screenshot shows a 'Pay Plan' form with the following details:

PAY PLAN	
Main	
ACCOUNT ID	4127586992 JONES,AARON M, Residential, SCHEDULED PAYMENTS \$164.30
STATUS	Active
CREATED BY	JCARROLL Cancel
LAST UPDATED BY	
TYPE	RES Residential Payment Plan
DEBT CLASS	Standard utility debt
CURRENT BALANCE	164.30
DELINQUENT DEBT	156.48
THIRD PARTY PAYOR	
PAYOR ACCOUNT ID	4127586992 JONES,AARON M, Residential, \$164.30
START DATE	07-19-2022
PAY METHOD	By Mail
TOTAL AMOUNT	164.30

A table for 'SCHEDULED PAYMENTS' is also shown, with one row highlighted and circled in red:

	SCHEDULED DATE	SCHEDULED AMOUNT
+	08-03-2022	164.30

Public Assistance Pay Plan

(don't use this option in customer service)

- When there's an active public assistance pay plan, the amount in the pay plan is protected and the customer is only responsible for the difference.
 - Example: Current balance is \$164.30 - Public assistance pay plan is \$130.00 = \$34.30 is the amount the customer has to pay this month.

The screenshot shows the 'Pay Plan' module interface. At the top, there are buttons for 'Bookmark', 'Clear', 'Save', and 'Refresh'. On the left, a sidebar titled 'Main' contains fields for 'ACCOUNT ID' (4127586992), 'STATUS' (Active), 'CREATED BY' (JCARROLL), 'LAST UPDATED BY' (PUBASSIST), 'TYPE' (Public Assistance Payment Plan), 'DEBT CLASS' (Standard utility debt), 'CURRENT BALANCE' (\$164.30), 'DELINQUENT DEBT' (\$156.48), 'THIRD PARTY PAYOR' (4127586992, JONES,AARON M, Residential, \$164.30), 'PAYOR ACCOUNT ID' (4127586992), 'START DATE' (07-19-2022), and 'PAY METHOD' (By Mail). In the center, a table titled 'SCHEDULED PAYMENTS' shows one entry: a scheduled date of 08-03-2022 and a scheduled amount of \$130.00. To the right, a sidebar titled 'Financial Information' displays current balance (\$164.30), last payment (06-05-2022, \$186.99), last billed (06-06-2022, \$156.48), previous bill (05-05-2022, \$323.37), and next bill date (08-04-2022). Another sidebar titled 'Current Context' lists contact information (JONES,AARON M - Home Phone: (813) 458-6798), account details (4127586992, JONES,AARON M, Residential, \$164.30), and address (1706 REDMOND BROOK LN, RUSKIN, FL, 33570, SFH (Sub WYNNMERE EAST PH 1)).

If a representative for a church, HSS, or other public assistance calls for a payment plan or to send guarantee letters.

- Provide fax number # (813)-635-7387, attention Credit Management.

Chapter Twelve: To Do's

Trip Fee

A To Do is just CCS's way of being able to direct messages on customer accounts to other departments with notes or alerts regarding the concern the CSR addressed. The next few pages will just be visual examples of what will be required in that situation.

Favorite Links

- To Do + [1]
- Customer Contact + [2]
- Pay Plan + [3]
- Online Utility Exchange [4]
- IWR Website [5]
- Water Wastewater Provider [6]
- Property Appraiser Website [7]
- Watering Restrictions [8]
- Solid Waste [9]
- CAMS
- BI Publisher
- Neptune 360 Portal

Add To Do Entry - Google Chrome

stg.utilities-cloud.oracleindustry.com/c786p1/test/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest								
OVERRIDE PRIORITY	*										
SUBJECT	ACCOUNT#7268946438 / TRIP FEE										
COMMENT	CUSTOMER CALLED TO MAKE CHANGES TO PENDING TURN OFF AFTER FIELD TECH ARRIVED- PLEASE CHARGE \$15 TRIP FEE										
SEND TO	Role										
ROLE	ACCT SPVR	Accounting Supervisor									
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td><input type="button" value="+"/></td><td><input type="button" value="Delete"/></td><td>* C1-ACCT</td><td>Account 7268946438</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE	<input type="button" value="+"/>	<input type="button" value="Delete"/>	* C1-ACCT	Account 7268946438
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE								
<input type="button" value="+"/>	<input type="button" value="Delete"/>	* C1-ACCT	Account 7268946438								

OK Cancel

Late Fee

Make sure the customer hasn't had a late fee canceled (waived) in the last 12 months.

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG&svcName=CILQTDEP&lang...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 – Highest								
OVERRIDE PRIORITY	*										
SUBJECT	ACCT#0424710000 / LATE FEE										
COMMENT	PLEASE WAIVE MARCH'S LATE FEE AS A 1X COURTESY										
SEND TO	Role										
ROLE	* ACCT SPVR	Accounting Supervisor									
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td><input type="button" value="+"/></td><td><input type="button" value="Delete"/></td><td>* C1-ACCT</td><td>Account 0424710000 STEPHENS,JOHN T, Residential, S-2</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE	<input type="button" value="+"/>	<input type="button" value="Delete"/>	* C1-ACCT	Account 0424710000 STEPHENS,JOHN T, Residential, S-2
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE								
<input type="button" value="+"/>	<input type="button" value="Delete"/>	* C1-ACCT	Account 0424710000 STEPHENS,JOHN T, Residential, S-2								
<input type="button" value="OK"/> <input type="button" value="Cancel"/>											

Misread

In this situation, most likely the customer called in about a high bill. The CSR asked the customer to read their meter, the customer provided the reading which verified the original misread. The CSR will send a **To Do** to billing to fix the bill.

To Do Entry

Main

To Do Type

Manual To Do Entry

* ACCT#0025490345/MISREAD

Subject

CUSTOMER PROVIDED METER READ ON 1/05@162597/10* METER WAS MISREAD ON 12/01@162980/00* PLEASE CORRECT BILL

Comments

To Do Type Priority

Priority 10 -- Highest

Override Priority

Send To

Role

Role

Billing Supervisor

Characteristics

		Characteristic Type	Sequence	Characteristic Value	
 	Account <input type="button" value="▼"/>	<input type="text" value="0025490345"/>		 GRINNELL,RAYMOND C, Residential, \$0.00	

Back Bill

BACK-BILL REASONS:

- Unauthorized usage
- Dead meter
- Change start date (lease or closing papers provided)

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest								
OVERRIDE PRIORITY	*										
SUBJECT	ACCOUNT#0025490345/BACK BILL										
COMMENT	PLEASE BACK BILL FROM (LAST DATE SERVICES WERE STOPPED)										
SEND TO	Role										
ROLE	* ACCT SPVR	Accounting Supervisor									
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td></td><td></td><td>* C1-ACCT</td><td>Account 0025490345</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE			* C1-ACCT	Account 0025490345
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE								
		* C1-ACCT	Account 0025490345								
		OK	Cancel								

Lost Refund Check

If a customer qualifies for a refund check, they will only be able to receive it via postal mail. If they don't receive the check in a certain amount of business weeks, send this To Do to Accounting to send the check back out.

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=E...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest								
OVERRIDE PRIORITY	*										
SUBJECT	ACCOUNT#0025490345 / LOST REFUND CHECK										
COMMENT	CUSTOMER STATES NEVER RECEIVED REFUND CHECK* PLEASE SEND AFFIDAVIT LETTER										
SEND TO	Role										
ROLE	ACCT SPVR	Accounting Supervisor									
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td></td><td></td><td>* C1-ACCT</td><td>Account 0025490345</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE			* C1-ACCT	Account 0025490345
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE								
		* C1-ACCT	Account 0025490345								

Pending Bill

To Do Entry

Main ①

To Do Type	Manual To Do Entry
Subject	* ACCT#0025490345/ PENDING BILL
Comments	METER READ AVAILABLE* PLEASE GENERATE THE PENDING BILL (DATE OF PENDING BILL)
To Do Type Priority	Priority 10 -- Highest
Override Priority	<input type="button" value="▼"/>
Send To	<input type="button" value="Role ▼"/>
Role	<input type="button" value="Billing Supervisor ▼"/>

Characteristics

	Characteristic Type	Sequence	Characteristic Value	
<input type="button" value="+"/> <input type="button" value="Delete"/>	Account <input type="button" value="▼"/>	<input type="button" value=""/>	0025490345	<input type="button" value="GRINNELL,RAYMOND C, Residential, \$0.00"/> <input type="button" value=""/>

System Estimate

There are certain situations where the meter can't be read so an estimate is necessary. If the customer doesn't agree with the estimate, they can read the meter themselves and provide us with the reading. Billing will need to be sent a To Do with the accurate reading to create the bill.

To Do Entry

Main

To Do Type	Manual To Do Entry
	* ACCT#0025490345/ SYSTEM ESTIMATE
Subject	
Comments	CUSTOMER PROVIDED METER READ ON 1/02@16259/10* CUSTOMER'S BILL WAS SYSTEM ESTIMATED ON 12/05@16392/00* PLEASE CORRECT BILL
To Do Type Priority	Priority 10 -- Highest
Override Priority	<input type="button" value="▼"/>
Send To	<input type="button" value="Role ▼"/>
Role	<input type="button" value="Billing Supervisor"/> 

Characteristics

	Characteristic Type	Sequence	Characteristic Value	
 	<input type="button" value="Account"/> 	<input type="button" value=""/>	0025490345	 GRINNELL,RAYMOND C, Residential, \$0.00

Old Meter Final Read

High usage after meter change out:

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG&svcName=CILQTDEP&lang...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest												
OVERRIDE PRIORITY	*														
SUBJECT	ACCT#0769936140/ HIGH READ ON METER REPLACEMENT														
COMMENT	FINAL READ ON THE OLD METER IS REALLY HIGH* REVIEW AVG CONSUMPTION ON THE OLD METER AND CONSUMPTION ON NEW METER														
SEND TO	Role														
ROLE	* ACCT SPVR	Q Accounting Supervisor													
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td>+ </td><td>* C1-ACCT</td><td>Q Account</td><td>0769936140 EPISCOPO,KATELYNN M, Residential</td></tr><tr><td colspan="4"></td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE	+	* C1-ACCT	Q Account	0769936140 EPISCOPO,KATELYNN M, Residential				
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE												
+	* C1-ACCT	Q Account	0769936140 EPISCOPO,KATELYNN M, Residential												
<input type="button" value="OK"/> <input type="button" value="Cancel"/>															

Deposit Credit (Active)

Qualifications for deposit to be credited:

- 2 years of active services
- Last 12 months: All payments were made on time.
- Deposit will be credited to the account (no refund)

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG...

TO DO TYPE	Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest								
OVERRIDE PRIORITY											
SUBJECT	ACCOUNT#0025490345/DEPOSIT CREDIT										
COMMENT	PLEASE CREDIT DEPOSIT TO THE ACCOUNT* CUST MEETS REQ FOR NO DEPOSIT										
SEND TO	Role										
ROLE	C&C	Credit and Collectitons									
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td></td><td></td><td>C1-ACCT</td><td>Account 0025490345</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE			C1-ACCT	Account 0025490345
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE								
		C1-ACCT	Account 0025490345								

OK Cancel

Deposit Refund (UMA) (Closed)

When a customer ends their service or closes their account, it is important to get their updated mailing address (UMA) so they can receive a deposit refund (or whatever is left over following the final bill). Here, they most likely didn't have a UMA when they closed the account, so they called back to update it.

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest								
OVERRIDE PRIORITY	*										
SUBJECT	ACCOUNT#0025490345/DEPOSIT REFUND										
COMMENT	CUSTOMER PROVIDED MA* PLEASE UPDATE MA FOR REFUND TO PO BOX 2726 DUNNELLON, FL 34430										
SEND TO	Role										
ROLE	* ACCT SPVR	Accounting Supervisor									
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td></td><td></td><td>* C1-ACCT</td><td>Account 0025490345</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE			* C1-ACCT	Account 0025490345
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE								
		* C1-ACCT	Account 0025490345								

Change Start or Stop Date

In this situation, for whatever reason the field activity to stop the service didn't go through. To ensure the customer isn't charged for water they didn't use, accounting needs to back date the account for what the original stop date needed to be.

Add To Do Entry - Google Chrome

utilities-cloud.oracleindustry.com/c786p1/prod/ccs/web/uiPage/toDoEntryPopupAdd?language=ENG&svcNa...

TO DO TYPE	* Manual To Do Entry	TO DO TYPE PRIORITY	Priority 10 -- Highest												
OVERRIDE PRIORITY	*														
SUBJECT	ACCT# 5043203145/ BACK DATE STOP														
COMMENT	PLEASE BACK DATE STOP TO 12/02/21 PER CUST ORIGINAL REQ. FA DID NOT CREATE IN SYSTEM														
SEND TO	Role														
ROLE	* ACCT SPVR	Accounting Supervisor													
CHARACTERISTICS	<table border="1"><thead><tr><th></th><th></th><th>CHARACTERISTIC TYPE</th><th>CHARACTERISTIC VALUE</th></tr></thead><tbody><tr><td>+</td><td>trash</td><td>* C1-ACCT</td><td>Account</td></tr><tr><td></td><td></td><td></td><td>5043203145</td></tr></tbody></table>					CHARACTERISTIC TYPE	CHARACTERISTIC VALUE	+	trash	* C1-ACCT	Account				5043203145
		CHARACTERISTIC TYPE	CHARACTERISTIC VALUE												
+	trash	* C1-ACCT	Account												
			5043203145												
	<p>OK Cancel</p>														

Chapter Thirteen:

Emails Covered

Field Service Dispatcher Email

Certain situations require an email to be sent to Field Service Dispatch. Any email that you send needs to have the analysts and supervisors CC'd as well. These are the situations that would require an email to Field Service Dispatchers:

- Match with a move (5 pm tag)
- Turn on WRI 2nd trip
- Emergency turn-off
- Active customer-no water
- Friday "New Service Same-day turn on" after 4 pm (speak with analyst and call dispatch supervisor first)
- Friday "Severance Same-day reconnect" after 4 pm (speak with analyst and call dispatch supervisor first)Match with a move: if there's a 5 pm tag, add information next to "MATCH WITH MOVE" (that you will get from the FA notes)

The screenshot shows an Outlook window with the following details:

- Message Bar:** File, Message (selected), Help.
- Search Bar:** Tell me what you want to do.
- Toolbar:** Delete, Archive, Respond, Quick Steps, Move, Tags, Editing, Speech, Zoom, Phish Alert, Insights.
- Message Header:** Wed 9/8/2021 1:18 PM, Dunn, Dustin, NORTH.
- To:** Field Service Dispatchers.
- Cc:** Adkins, Kay; Carroll, Jomar; Johnson, Tonji; Joyner, Kashaunda; Reed, LaKenya; Smith, Trena; Thomas, Yarmilia; Walker, Donnetta; Williams, Gregory.
- Subject:** 3117 MAJESTIC VIEW DR, LUTZ, FL 33558 N2 MATCH WITH MOVE - L/ON L/5PM TAG AD 9/8/2021 12:12PM RD 23722/20
- Body:** Dustin Dunn, Customer Service Representative, Water Resources Department.
P: (813) 272-6680 ext#43408
E: Dunnd@HillsboroughCounty.org
W: HCFLGov.net

All other emails will follow the same format only difference will be the last line.

- Replace “MATCH WITH MOVE” with the reason for the email.
See example below:

NORTH - Message (HTML)

File **Message** Insert Options Format Text Review Help Tell me what you want to do

Paste **Names** Attach File **Tags** Insights View Templates My Templates

Clipboard Basic Text Include

To... Dunn, Dustin; Adkins, Kay; Davis, Eve; Johnson, Tonji; Joyner, Kashaunda (Nikki); Joyner, Kashaunda (Nikki); Reed, LaKenya; Smith, Trena; Thomas, Yarmilia; Walker, Donnetta; Williams, Gregory;

Cc... Subject NORTH

3117 MAJESTIC VIEW DR, LUTZ, FL, 33558
N2
EMERGENCY TURN OFF

Dustin Dunn
Customer Service Representative
Water Resources Department

P: (813) 272-6680 ext#43408
E: Dunnd@HillsboroughCounty.org
W: HCFLGov.net

Hillsborough County Public Utilities Administration
15610 Premier Drive, Tampa, FL 33624

Write Off

Send email to credit management supervisor Mary Beard:

- When a write-off is paid in full, send an email to credit management.
- **Per Mary Beard**, leave the body of the email blank

The screenshot shows the Microsoft Word ribbon interface with the title bar "Untitled - Message (HTML)". The "Message" tab is selected. The "Clipboard" group contains "Paste" and "Send" buttons. The "Basic Text" group includes "B", "I", "U", "A", and "A^o" buttons. The "Names" button is also present. The "Include" group contains "Attach File", "Attach Item", and "Signature" buttons. The "Tags" button is shown. The "View Templates" and "My Templates" buttons are located on the far right. The main content area shows an email message to "Beard, Mary" with the subject "ACCOUNT#1234567890/ WRITE OFF PAID IN FULL". A large orange oval highlights the entire body of the email message, which contains the contact information for Eve Davis and the Hillsborough County Public Utilities Administration.

Eve Davis
Q/A & Training Analyst
Water Resources Department

P: (813) 272-6680 ext#43466
E: DavisEv@HillsboroughCounty.org
W: HCFLGov.net

Hillsborough County Public Utilities Administration
15610 Premier Drive, Tampa, FL 33624

[Facebook](#) | [Twitter](#) | [YouTube](#) | [LinkedIn](#)

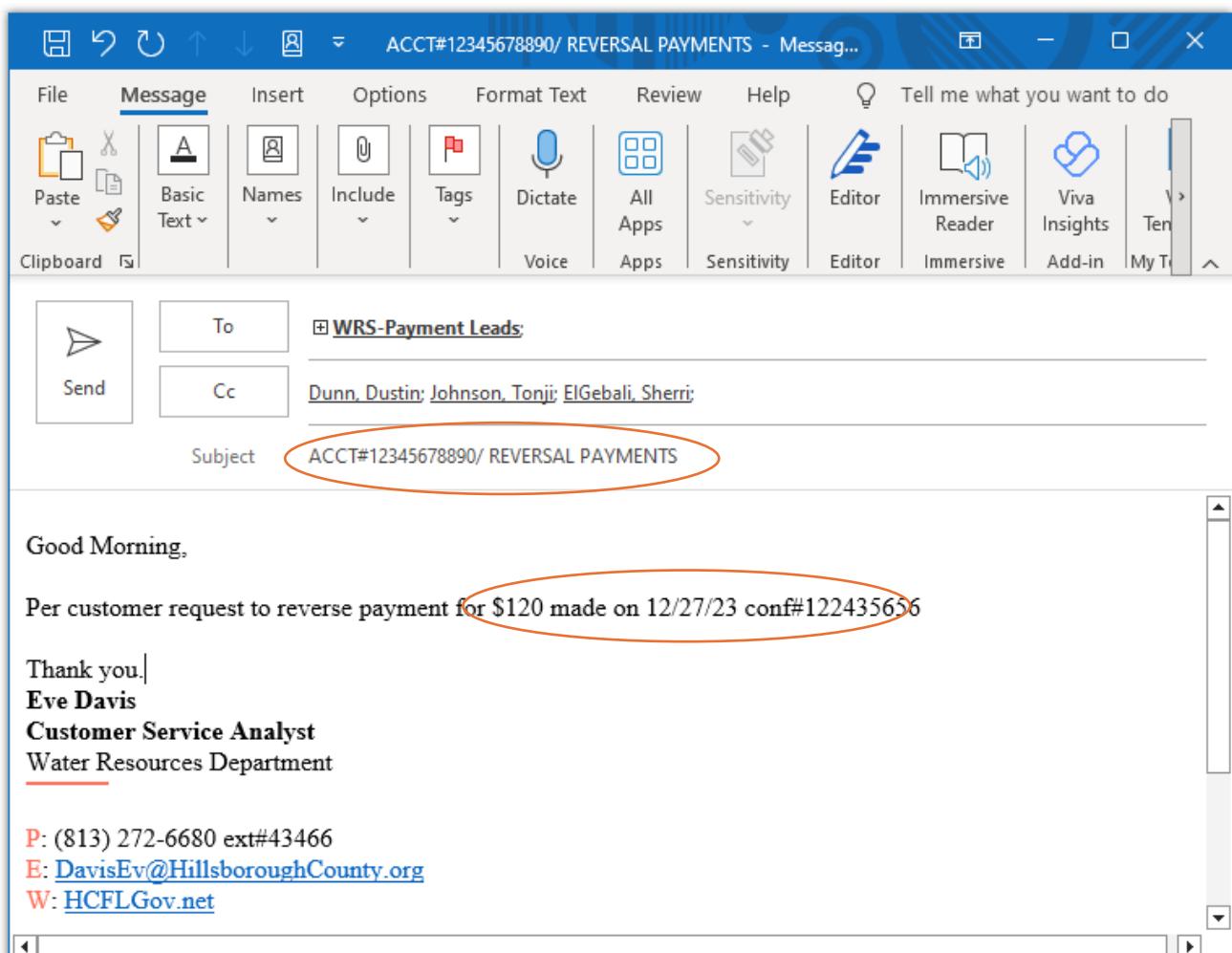
Payments

Send all emails to: wrs-paymentleads@hillsboroughcounty.org and CC all call center supervisors and analysts.

Types of email requests sent to payments: Include how the payment was made, the confirmation number, the amount, and the date

- Payment reversal
- Misapplied payment
- Missing payments

Email Example:



Emailing Customers

Though customers may request to have an email sent to them of proof of service or payment confirmation, emailing the customer should be the very last resort. If you must email, it needs to follow this script. Make sure to **BCC** your analyst and supervisor.

Screenshot of Microsoft Word interface showing an email message to "MRS.POTER@AOL.COM". The subject is "HILLSBOROUGH COUNTY RESOURCES DEPT". The message body starts with "Dear Mrs.Porter," and continues with a proof of service message.

As per our conversation, here is proof of your start of services with Hillsborough County Public Utilities. If you still need assistance, please contact our customer services department at 813-272-6680 Monday- Friday 8:00 am to 5:00 pm.

Screenshot of Control Central application showing account information for Person JONES,ADRIAN, Account ID 5493425662, Premise 712 OCEAN SPRAY DR, RUSKIN, FL, 33570, SFH (Sub SHELL COVE PHASE 2). It also shows a SA Premise List table with two entries for the same premise.

Customer Information (Map Zone)

Premise	Current Balance	Payoff Balance	SA Information
712 OCEAN SPRAY DR, RUSKIN, FL, 33570, SFH (Sub SHELL COVE PHASE 2)	\$0.00	\$0.00	HCWRS / Waste Water Residential, WW-MTR, Active, 02-11-2022, 5490219008
712 OCEAN SPRAY DR, RUSKIN, FL, 33570, SFH (Sub SHELL COVE PHASE 2)	\$0.00	\$0.00	HCWRS / Water Residential, W-MTR, Active, 02-11-2022, 5490444116

Thank you,
Eve Davis
Customer Service Analyst
Water Resources Department

P: (813) 272-6680 ext#43466
E: DavisEv@HillsboroughCounty.org
W: HCFLGov.net

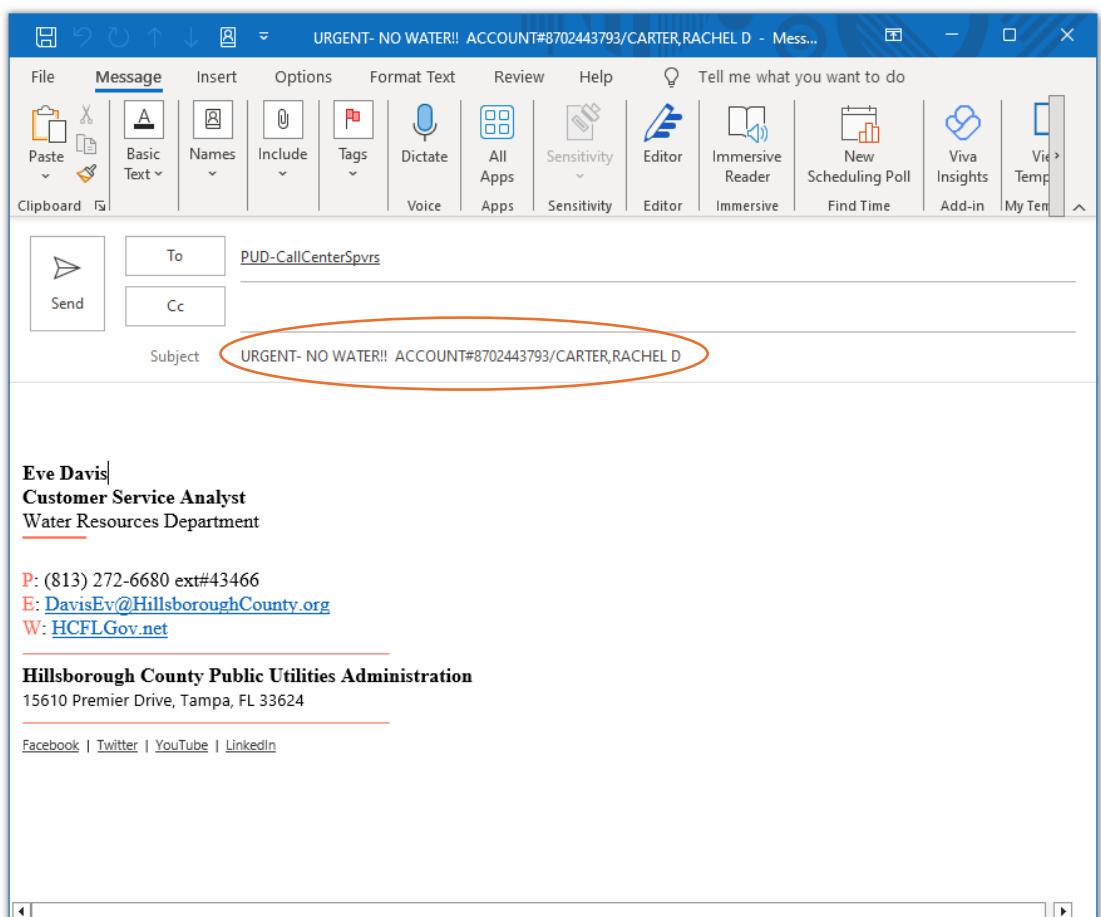
Hillsborough County Public Utilities Administration
15610 Premier Drive, Tampa, FL 33624

Supervisor Referrals

When a customer call becomes escalated, or highly concerned, they might request (or demand) to talk to a supervisor.

- Make sure you verify the customer's phone number.
- The customer contact should include all details of the customer's concern. (leave email blank)
- Advise the customer that supervisors are “working supervisors”, and someone will call them back.
- Don't provide a timeframe, if customers ask for a timeframe, let them know it will be as soon as one is available.
- Send email refers to PUD-CallCenterSpvrs <PUDCallCenterSpvrs@hillsboroughcounty.org>

Example 1:
**For
customers
requiring
immediate
attention or
customer
has no water
(severance
disconnect):**



- Add **URGENT-NO WATER** in the subject line.
- If the customer is refusing a callback, send an email to refer back to, and send a TEAMS message to your analyst. If your analyst is not available, use the chain of command until you find someone available to assist the customer

Example 2:

For billing or a non-urgent supervisor referral:

The screenshot shows an 'Untitled - Message (HTML)' window in Microsoft Outlook. The ribbon menu is visible at the top, with 'Message' selected. The toolbar includes standard options like Paste, Bold, Italic, Underline, and various text formats. Below the toolbar, the 'To...' field contains 'PUD-CallCenterSpvrs'. The 'Subject' field is highlighted with a red oval and contains the text 'PUD REF** ACCOUNT#8702443793/ CARTER, RACHEL D'. The main body of the email starts with the contact information for Eve Davis, followed by a section for Hillsborough County Public Utilities Administration, and ends with social media links.

Eve Davis
Q/A & Training Analyst
Water Resources Department

P: (813) 272-6680 ext#43466
E: DavisEv@HillsboroughCounty.org
W: HCFLGov.net

Hillsborough County Public Utilities Administration
15610 Premier Drive, Tampa, FL 33624

[Facebook](#) | [Twitter](#) | [YouTube](#) | [LinkedIn](#)

Time Off

Send to your direct analyst, and CC all supervisors.

- Don't put in time in Oracle until the time off request is approved.

Untitled - Message (HTML)

File **Message** Insert Options Format Text Review Help

Paste Basic Text Names Include Tags Dictate Sensitivity Editor Immersive Reader Viva Insights Add-in New Meeting Poll FindTime My Te

To: Thomas, Yarmilia;

Cc: Smith, Trena; Reed, LaKenya; Carnegie, Josh; ElGebali, Sherri; Adkins, Kay;

Subject: LEAVE REQUEST

If partial day: Requesting (sick/vacation/floating holiday) time off on (date) from time to time.

Example: requesting sick time on 8/1/22 from 8:00 to 11:00

If full day: Requesting (sick/vacation/floating holiday) off on (date)

Example: requesting full day vacation on 8/1/22.

If multiple days: Requesting (sick/vacation/floating holiday) from (date) through (date)

Example: requesting full days' vacation from 8/1/22 through 8/5/22.

Chapter Fourteen:

Same Day Service

Emergency Turn Off

Most commonly, the customer calls and advises there is a leak on the property and a turn-off is needed immediately.

NOTE: Be sure to indicate in the Customer Contact who called for the emergency turn-off in case there is a dispute later about the fee or the request being made at all.

- If there is a plumber at the house who cannot get curb stop or meter off, transfer to Line Maintenance.
- If anyone other than the property owner or resident is calling for an emergency turn-off and the property owner is not available, determine their involvement (i.e. passer-by, lawn maintenance person, or neighbor) and dispatch the emergency turn-off. The CSR will attempt to contact the property owner; however, the FSR will also tag the door.

Steps:

1. Ensure the customer is in our service area.
2. Advise the customer/caller there will be a service charge for the emergency turn-off versus a no service charge for a scheduled turn-off (for the next day, etc.)
3. If the customer wants to schedule a next-day turn-off for repairs, it will be with NO FEE.
 - Create an FA using the field activity type T/OFFREPR (Fld Svc Turn Off Cust Repair)
 - For Scheduled repairs, the tech usually will respond before Noon (they try to prioritize)
4. If the customer authorizes the emergency turn-off.
 - Create a FSEMTOFF Field Activity for the turn-off.

5. If the premise has more than one service point, select the correct meter (irrigation, water, water/wastewater).
6. Contact the appropriate dispatcher by phone to advise the FSEMTOFF field activity was just created and send an email to dispatch.
7. The FSR will turn off the meter. If the problem is on the county's side of the meter, the FSR will notify line maintenance for repair.
 - There will be no charge for the trip if the problem is on the county's side.
 - If the problem is on the customer's side, they will be responsible for any needed repair.
8. The FSR will tag the premise door.

Cancelation of an Emergency turn-off request

The customer calls back to cancel a request for an emergency turn-off because they were able to turn it off themselves.

- Advise the customer only a county employee is authorized to turn off the meter. Any damages will be billed to the customer.
- Advise the customer that once staff is dispatched to the property, the service charge is still applicable.
- Find the FSEMTOFF FA.
- If it has been worked, advise the customer that the water is already off.
- If it has not been worked, cancel it.
- Contact the appropriate dispatcher (zone) by phone to advise of cancellation.

Turn-on After Repairs

Turn on the meter after an emergency or turn-off for customer repairs:

1. Once the customer has completed the repair, they may call for the meter to be turned back on.
2. Create a TONMETER field activity. This can be worked on the same day with no additional charge.
3. Contact the appropriate dispatcher (by zone) by phone to advise the TONMETER field activity was just created and send email.

Active Account No Water

Determine if the issue is WA/WW, IRRIGATION, or RECLAIMED

- Waste Water only accounts, please refer to city of Tampa for “no water”
- Make sure customer wasn’t disconnected for non-payment

Questions to ask the customer before creating a field activity:

- Ask the customer if they have checked the customer hand valve?
- Ask if they have checked both inside and outside their home?
- Ask the customer if the neighbors have water?
- Check email, check teams, then if nothing on either of those, call line maintenance to verify if it is an outage? **(if it is an active outage: stop here- no action is required)**

Water only and water/waste water meter:

Once all questions have been answered and there are no outages and the customer hand valve is open, create a “TURN ON METER” **(schedule it for same-day).**

- You must advise the customer **if it’s not a county issue a \$15 trip charge will apply.**
- Be sure to select the correct meter that the customer is calling about i.e.: (WA/WW, reclaimed or irrigation)
- Create a trigger on the account for the following day to determine if it was a county issue.
- If the FA shows that it was a customer issue, you will need to send a **To Do to Accounting** to bill the \$15 fee.
- Send email to Field Service Dispatcher at FieldServiceDispatchers@hillsboroughcounty.org and call the dispatcher (daily email sent out).

Reclaimed no-meter/ with meter /and irrigation meter:

Create a “PREMISE INVESTIGATION”

(schedule it for next day)

- If the customer states, “the reclaim box is full of water/leaking” (refer the customer to line maintenance)

Water Running Inside

The customer states that they requested a turn-on, but the water is still off and there's a door tag.

WRI – WATER RUNNING INSIDE: Water running inside (WRI) is a term used to describe the situation which occurs when a field service representative (FSR) turns the water meter on and the flow through the meter does not stop once the lines are filled. The water is turned off to not flood the customer's home or cause any other damage.

Steps:

Find the field activity for the turn-on and click on the **service order management activity** hyperlink.

Premise Activity Overview ⓘ		☒ ^
FA DATE/TIME ▾	FA INFORMATION	SERVICE ORDER MANAGEMENT ACTIVITY INFORMATI
06-04-2021 12:00:00AM	WA/VW RESIDENTIAL Meter Size <= 1-1/2", Start/Stop Service Request , Start Service, Completed, 06-04-2021 12:00:00AM ⓘ	Enable Service Type / 1101 BELLADONNA DR, BR 12:00:00AM EDT / 06-04-2021 10:04:21AM EDT / C
05-27-2021 12:00:00AM	WA/VW RESIDENTIAL Meter Size <= 1-1/2", Start/Stop Service Request , Stop Service, Completed, 05-27-2021 12:00:00AM ⓘ	Disable Service Type / 1101 BELLADONNA DR, BR 12:00:00AM EDT / 05-27-2021 2:26:00PM EDT / C
11-25-2019 5:10:12AM	WA/VW RESIDENTIAL Meter Size <= 1-1/2", Severance Process , Disconnect Warning, Completed, 11-25-2019 5:10:12AM ⓘ	Field Activity / Fld Svc Pre-Tag Notice / Customer 5:10:12AM
09-25-2019 5:11:11AM	WA/VW RESIDENTIAL Meter Size <= 1-1/2", Severance Process , Disconnect Warning, Completed, 09-25-2019 5:11:11AM ⓘ	Field Activity / Fld Svc Pre-Tag Notice / Customer 5:11:11AM

Scroll down to **Activity Hierarchy** and click on the 2nd hyperlink **Field Activity/Turn on Meter**.

Activity Hierarchy

- Enable Service Type / 1101 BELLADONNA DR, BRANDON, FL, 33510, USA / 06-03-2021 9:33:10AM / 06-04-2021 12:00:00AM EDT / 06-04-2021 10:04:21AM EDT / Completed
- Field Activity / Turn On Meter / Customer to Meter / 2210832939 / Completed / Create Date Time: 06-03-2021 9:33:13AM
- Field Activity Outbound Communication / Outbound / Completed / 06-03-2021 9:33:13AM
- Field Activity Inbound Communication Type / Inbound / Completed / 06-04-2021 10:04:43AM
 - Connect SP - Field Work Completion / 06-04-2021 10:04:43AM / Executed
 - Connect Meter - Field Work Completion / 06-04-2021 10:04:43AM / Executed
 - Create FA IMD Completion Event / 06-04-2021 10:04:43AM / Executed

Look for “comments” to determine why the water wasn’t turned on

Activity

Main	Record Actions
INFORMATION Field Activity / Turn On Meter / Customer to Meter / 2210832939 / Completed / Create Date Time: 06-03-2021 9:33:13AM	Record Information
ACTIVITY TYPE Field Activity	Request Information
STATUS Completed	Contact Details
SERVICE DATE TIME 06-04-2021 12:00:00 AM EDT	Address Information
PARENT ACTIVITY Enable Service Type / 1101 BELLADONNA DR, BRANDON, FL, 33510, USA / 06-03-2021 9:33:10AM / 06-04-2021 12:00:00 AM EDT / 06-04-2021 10:04:21 AM EDT / Completed	ADDRESS 1101 BELLADONNA DR
SERVICE POINT 33510 / WA/WW RESIDENTIAL Meter Size <=1-1/2" / Cycle 19, Timberpond / Active	CITY BRANDON
FIELD TASK TYPE Turn On Meter	POSTAL 33510
RECIPIENT Field Services	COUNTRY United States of America
COMMENTS 06735/28-47 T/ON WRI L/OFF AT MTR L/TAG N/M/M, VERIFIED CHV IS NOT HOLDING	STATE FL

(Turned off at Customer Hand Valve)

FIELD ACTIVITY COMMENTS: T/ON RD 5076/96--5077/11 WATER IS OFF AT CHV RIGHT SIDE OF HOME BROWN HANDLE N/M/M

Translates to: Turn on read is 5076/96--5077/11 water is off at customer hand valve, located on right side of the home, it's a brown handle, no meter movement.

- This situation doesn't require another trip. Let the customer know the water is on at the meter and they just need to turn the hand valve to have water.

(Turned off at Curb stop)

FIELD ACTIVITY COMMENTS: 06735/28-/47 T/ON WRI L/OFF AT MTR L/TAG N/M/M, VERIFIED CHV IS NOT HOLDING

Translates to: 06735/28-/47, turn on the meter, water running inside, **left off at the meter**, left tag, no more movement, verified customer hand valve is not working.

Water was left off at the meter, a 2nd WRI trip is required (see example below)

- 2nd trip WRI (no fee). Keep in mind if the water is still running, and the customer is not home, the water will be left off at the meter again.
- 3rd trips are the for next day and there's a \$15 3rd trip fee.

Request for same-day service will be subject to availability:

- Dispatchers should first be contacted to determine if an additional premise visit can be accommodated.
- The customer or an approved person (18+) are on-site to ensure that everything is off inside the building and or assume responsibility for leaving services on while water consumption is registering at the meter.
- If the request cannot be accommodated, then it will need to be scheduled for the next business day.

Go to the current context on the dashboard and click on the **Premise Notebook** hyperlink.

Current Context

- BROWN,ADRIAN X
- 3280721831 1 BROWN,ADRIAN X, Residential, \$115.38
- 12816 TAR FLOWER DR, TAMPA, FL, 33626, SFH (Sub WESTWOOD LAKES PH 2B)

Scroll down to the premise information and click on the drop-arrow next to the correct “SP” meter information.

- If there is more than one meter on the premise, make sure you select the correct meter.

The screenshot shows a list of items under a heading "Premise - 12816 TAR FLOWER DR, TAMPA, FL, 33626, SFH (Sub WESTWOOD LAKES PH 2B)". The items are:

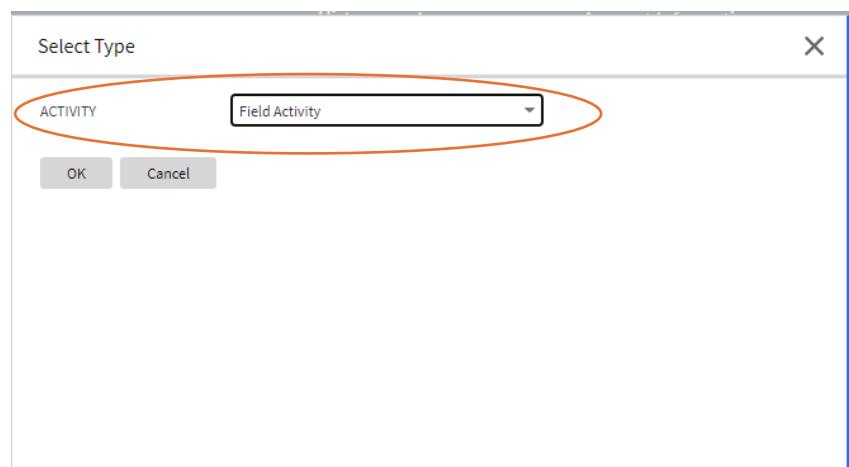
- ▶ SP - 12816 TAR FLOWER DR, TAMPA, FL, 33626 / Reclaimed Water - No Meter / Active (with a red box around the checkbox and a red arrow pointing to it)
- ▶ SP - 12816 TAR FLOWER DR, TAMPA, FL, 33626 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 04, Westwood/9 Eagle / Active (with a red arrow pointing to the list item)
- ▶ Account - 3280721831 BROWN,ADRIAN X, Residential, \$0.00
- ▶ Historical service agreement(s) exist.

A large blue arrow points from the bottom right towards the second item in the list. To the right of the list is a vertical grey sidebar with a list of options:

- Go To Service Point
- Add Field-Related Activity
- Go To 360 View
- Go To Activity
- Go To Appointment Portal
- Go To DataRaker
- Go To Device
- Go To Install Event

Click on **Add Field-Related Activity** to create a new field activity

Select **Field Activity**



In the instructions box, include if the customer will be home or if the issue has been resolved.

Field Activity

Main

ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	07-13-2022 12:00:00AM EDT
PARENT ACTIVITY	
SERVICE POINT	664831032000 12816 TAR FLOWER DR, TAMPA, FL, 33626 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 04, Westwood/9 Eagle / Active
EXTERNAL SERVICE POINT ID	
FIELD TASK TYPE	Fld Svc T/ON WRI 2nd
APPOINTMENT WINDOW DATE TIME	
APPOINTMENT END DATE TIME	
TAKEN BY	
TAKEN DATE	
COMMENTS	
RECIPIENT	
COMMENTS	
INSTRUCTIONS	CUST STATED LEAK HAS BEEN REPAIRED

For a same-day WRI trip Send an email to dispatch

NORTH - Message (HTML)

File Message Insert Options Format Text Review Help

This email message will be sent to about 27 recipients.
Johnson, Tonji ~~X~~ Joyner, Kashaunda (Nikki) ~~X~~: These recipients are sending automatic replies.

To: [Field Service Dispatchers](#)
Cc: Johnson, Tonji; Joyner, Kashaunda (Nikki); Joyner, Kashaunda (Nikki); Stevens, Stacey; Cleveland, Nekaybaw; Thomas, Yarmilia

Subject: NORTH

12816 TAR FLOWER DR, TAMPA, FL, 33626, SFH
N7
WRI 2ND TRIP

Severance Timeline

**disclaimer: CSR need to make sure they're checking the service agreements when a customer is calling in to make a payment after a service interruption. Reason, there have been many occasions where CSRs are advising customer once they make the payment their service will automatically be restored on accounts where the SAs have already stopped.

(21 days)

Date	7-10th Day	21th Day	22nd Day	22nd Day	30th Day	44th Day	51st Day	52nd Day	54th Day	59th Day	60th Day	81st Day	82nd Day	92nd Day	122nd Day
Bill # 1	Recur Auto Pay Process	Bill Due	Late Pay Charge	Collection Process Step # 1	Bill # 2	Collection Process Step # 2	Bill Due	Collection Process Step # 3, Severance Process Steps # 1 & # 2	Severance Process Step # 3	Severance Process Step # 4	Severance Process Step # 5 Final Bill	Bill Due	Write Off Process Step # 1	Write Off Process Step # 2	Write Off Process Step # 3
	5% each SA	Lower Credit Score	Bill Notice Message	Letter/ Post Card				Lower Credit Score	Disconnect FTT \$15 Interrupt Fee	Stop SAs	Expire SAs		Send CB Letter	Collection Agency Referral	Write Off SA
								Pre-tag FTT \$10 Collection Attempt Fee			Bill Notice Message				

Severance Reconnect

Guide for Same Day Reconnection for Severance

Guidelines for if same day reconnect is an option.

- **This service should not be offered**, but if the customer continues to push, we would be able to schedule the same day reconnect **if** Field Service allows.
- It must be scheduled before 4pm.
- This is only for reconnects. If the customer's service or SA's have been disabled then the customer would be starting new service and same day is not an option, *unless* on Fridays or a day before a Holiday.
- The customer must pay the full balance and the \$35.00 same day fee per meter. The customer should pay and call back.
- The customer's account must have a \$35.00 credit if they have 1 meter and a \$70.00 credit if they have 2 meters (Reclaimed/Irrigation Meter)

Steps for Completing Same Day reconnect:

1. Verify the customer has a \$35.00 credit on the account if they have 1 meter and a \$70.00 credit if they have 2 meters.
2. Schedule a Field Activity of **Fld Serv T/ON Same Day W/Fee**.
3. Send an email to Field Service Dispatchers
FieldServiceDispatchers@hillsboroughcounty.org.

CENTRAL

Dunn, Dustin
To Field Service Dispatchers

2606 QUEEN ALBERTA DR, VALRICO, FL, 33596
C14
SAME DAY RECONNECT WITF FEE

Dustin Dunn
Customer Service Analyst- Enterprise Solutions
Water Resources Department

P: (813) 272-6680 ext#43408
E: DunnD@HillsboroughCounty.org
W: HCFLGov.net

Hillsborough County Public Utilities Administration
332 N Falkenburg Rd, Tampa, FL 33619

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Thu 01/04/2024 12:41 PM

4. The reason this email **below** will be sent is because a new person has started service at an address that has an active severance in process showing in the alerts. Send an email to Credit Management to cancel the severance process. The email must be sent to have the severance process removed from the account to prevent the new person of getting shut off.

ACCOUNT # 4219942034 - 2606 QUEEN ALBERTA DR, VALRICO, FL, 33596

Dunn, Dustin
To WRSCC

Please cancel severance process. Service was reconnected today.

Dustin Dunn
Customer Service Analyst- Enterprise Solutions
Water Resources Department

P: (813) 272-6680 ext#43408
E: DunnD@HillsboroughCounty.org
W: HCFLGov.net

Hillsborough County Public Utilities Administration
332 N Falkenburg Rd, Tampa, FL 33619

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Thu 01/04/2024 12:43 PM

Chapter Fifteen: Field Activity

Setting up an FA (Field Activity)

Under Current Context, click on the **Premise Notebook** hyperlink.



Current Context ^

	BROWN,ADRIAN X	
	3280721831 1 BROWN,ADRIAN X, Residential,\$115.38	
	12816 TAR FLOWER DR, TAMPA, FL, 33626, SFH (Sub WESTWOOD LAKES PH 2B)	

- Only emergency turn off and active accounts with no water are *same-day* field activities.
- WRI 2nd trip and 3rd trips are subject to availability. (**Do not offer**)
- **Friday only:** New service same-day turn-on with \$35 fee and severance same-day (see same-day chapter)

Scroll down to Premise Information

- If the premise has multiple meters, make sure field activity is set up for the correct meter.
- Click on the **drop-arrow** next to the meter hyper-link.

▲ Premise - 11742 ALBATROSS LN, RIVerview, FL, 33569, SFH (Sub ESTUARY PHASE 5)

- ▶ SP - 11742 ALBATROSS LN, RIVerview, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
- ▶ SP - 11742 ALBATROSS LN, RIVerview, FL, 33569 / Water Only Irrigation Residential Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
- ▶ Account - 0031678135 BROWN,CAROLYN, Residential, \$0.00
- ▶ Historical service agreement(s) exist.

Select Add Field-Related Activity

LANDLORD AGREEMENT

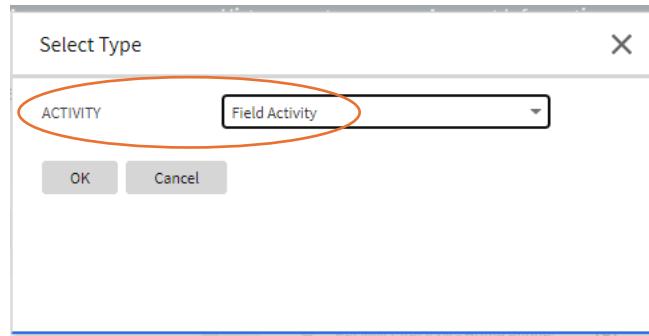
PARENT PREMISE ID

Premise - 11742 ALBATROSS LN, RIVERVIEW, FL, 33569, SFH (Sub ESTUARY PHASE 5)

- ▶ SP - 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
- ▶ SP - 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / Water Only Irrigation Residential Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
- ▶ Account - 0031678135 BROWN,CAROLYN, Residential, \$0.00
- ▶ Historical service agreement(s) exist.

Go To Service Point
Add Field-Related Activity
Go To 360 View
Go To Activity
Go To Appointment Portal
Go To DataRaker
Go To Device
Go To Install Event

Select Field Activity



Select and fill in
Service Date,
Field Task Type,
and **Instructions.**
Save!

Main

ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	<input type="text"/> <input type="button"/>
PARENT ACTIVITY	<input type="text"/> <input type="button"/>
SERVICE POINT	145389338900 <input type="text"/> <input type="button"/> 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
EXTERNAL SERVICE POINT ID	<input type="text"/>
FIELD TASK TYPE	<input type="text"/>
APPOINTMENT WINDOW DATE TIME	<input type="text"/> <input type="button"/>
APPOINTMENT END DATE TIME	<input type="text"/> <input type="button"/>
TAKEN BY	<input type="text"/>
TAKEN DATE	<input type="text"/> <input type="button"/>
COMMENTS	<input type="text"/>
RECIPIENT	<input type="text"/>
COMMENTS	<input type="text"/>
INSTRUCTIONS	<input type="text"/>
REQUESTER	<input type="text"/>

Pending or Completed FA

On the Account information screen scroll down to **Premise Activity Overview**

- Click on **FA DATE/TIME** to have the most recent activity shown at top of the list.
- The FA must be in **Activity in Progress** status to set up a Match with Move.
- Turn on completed, but no water, check for **WRI**.
- Once premise investigation is completed, click on the hyperlink for techs notes.
- Pre-tag.

Pending Field Activity (activity in progress)

Premise Activity Overview ⓘ		
FA DATE/TIME	FA INFORMATION	SERVICE ORDER MANAGEMENT ACTIVITY INFORMATION
07-01-2022 12:00:00AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Start/Stop Service Request , Start Service, Pending, 07-01-2022 12:00:00AM ⓘ	Enable Service Type / 1111 EL RANCHO DR, SUN CITY CENTER, 12:00:00AM EDT / Activity in Progress

Pre-tag and Severance's disconnect completed

Premise Activity Overview ⓘ		
FA DATE/TIME	FA INFORMATION	SERVICE ORDER MANAGEMENT ACTIVITY INFORMATION
⌚ 2 07-08-2019 5:13:10AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Severance Process , Cut for Non-Payment, Completed, 07-08-2019 5:13:10AM ⓘ	Cut Service for Non-Payment Type / 8810 BEL 5:13:10AM EDT / Completed
⌚ 3 07-02-2019 5:07:20AM	WA/WW RESIDENTIAL Meter Size <= 1-1/2", Severance Process , Disconnect Warning, Completed, 07-02-2019 5:07:20AM ⓘ	Field Activity / Fld Svc Pre-Tag Notice / Customer 5:07:20AM

Unauthorized usage (check tech's notes for fees)

Premise Activity Overview ⓘ		
FA DATE/TIME	FA INFORMATION	SERVICE ORDER MANAGEMENT ACTIVITY INFORMATION
06-03-2022 12:00:00AM		Field Activity / Fld Svc C/L/R - Unauthorized / Field Serv

Premise Investigations

Field service has a higher work demand on Fridays due to same-day turn-on, so **don't** set up premise investigations on Fridays.

Possible Dead-Meter

- Set a reminder to review field services' notes.
- Follow up with the customer to provide an update on the premise investigation's results.
- If field service's notes indicate a to-do is required (example: misread, trip fee, etc....), send a to-do to the appropriate department.
- After the follow-up is completed, add customer contact to reflect any actions taken.

Main

ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	07-18-2022 12:00:00AM EDT
PARENT ACTIVITY	
SERVICE POINT	145389338900 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
EXTERNAL SERVICE POINT ID	
FIELD TASK TYPE	Fld Svc Premise Investigation
APPOINTMENT WINDOW DATE TIME	
APPOINTMENT END DATE TIME	
TAKEN BY	
TAKEN DATE	
COMMENTS	
RECIPIENT	
COMMENTS	
INSTRUCTIONS	"0" USAGE READS- HOME IS OCCUPIED* POSSIBLE DEAD METER
REQUESTER	
REQUESTER TRANSACTION	

High usage or low usage re-read meter

- Set a reminder to check back on the Premise Investigation results
- For misreads, send To-Do to Billing to correct the bill

Main

ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	07-18-2022 12:00:00AM EDT
PARENT ACTIVITY	
SERVICE POINT	145389338900 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
EXTERNAL SERVICE POINT ID	
FIELD TASK TYPE	Fld Svc Premise Investigation
APPOINTMENT WINDOW DATE TIME	
APPOINTMENT END DATE TIME	
TAKEN BY	
TAKEN DATE	
COMMENTS	
RECIPIENT	
COMMENTS	
INSTRUCTIONS	HIGH READ* PLEASE VERF READ AND CHECK FOR ANY LEAKS AT THE METER

Leak at the meter

Main

ACTIVITY TYPE	Field Activity
SERVICE DATE TIME	07-18-2022 12:00:00AM EDT
PARENT ACTIVITY	
SERVICE POINT	145389338900 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
EXTERNAL SERVICE POINT ID	
FIELD TASK TYPE	Fld Svc Premise Investigation
APPOINTMENT WINDOW DATE TIME	
APPOINTMENT END DATE TIME	
TAKEN BY	
TAKEN DATE	
COMMENTS	
RECIPIENT	
COMMENTS	
INSTRUCTIONS	METER BOX FULL OF WATER* CHECK FOR LEAK AT THE METER
REQUESTER	
REQUESTER TRANSACTION	

PLEASE ALWAYS CHECK FOR COUNTY/CUSTOMER ISSUE

Dispatch Information

After FA has been created, call the dispatcher from the list (in the picture below) depending on the zone. A list will be sent everyday advising who is assigned to the zone depending on the time of day your request is being submitted (before or after 3:30 pm). If it is after 4:00 pm you will need to get with your direct report for approval.

Locate service area:

Premise Information

PREMISE INFORMATION	
CIS DIVISION	HCWRS
BUILDING PERMIT ISSUANCE DATE (YYYY-MM-DD)	2020-12-10
IMPACT FEE ASSESSMENT PROGRAM DATE	R05-106
CERTIFICATE OF OCCUPANCY DATE (YYYY-MM-DD)	2021-06-10
CONNECTION FEE PAYMENT METHOD	Impact Fee Assessment Program
SERVICE AREA	Central
SERVICE POINT INFORMATION	
DEVICE	124 AZUL DR, SEFFNER, FL, 33584 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Water Analog Meter / Effective Date/Time:08-03-2020 12:00:00AM EDT / Water Si
NEXT METER READ	07-06-2022 12:00:00AM (Cycle 06) - Expected Work Date: 07-07-2022
LAST MEASUREMENT	Value: 229.0, Regular 06-08-2022 11:14:08AM EDT, Measurement: 2,465, Previous: 2,465

Go to your email and find today's dispatch zone list:

- Send an email to Field Service Dispatchers

FieldServiceDispatchers@hillsboroughcounty.org

1/18/2024		
DISPATCH LIST		
AREA	BEFORE 3:30PM	AFTER 3:30PM
NORTH ZONES	David Colangelo 813-399-3885	Miguel Melendez 813-505-7335
CENTRAL ZONES	Julio Garcia 813-789-9865	Julio Garcia 813-789 9865
SOUTH ZONES	Mike DiDonatis 813-393-8224	Chuck Hughes 813-505-2653
S25,S26,S27,S29,S30,S31,S33	Lindsay Combee 813-335-9520	Brad Garcia 813-629-4239
SOUTH/CENTRAL		
C21,S19,S20,S22,S23,S24		
CALLING THE DISPATCHER / SAME DAY		
There should be no same day turn-ons after 4:30pm. If you need a "Same Day" Turn On (AFTER 4:30PM) you must first get Manager's approval and then call the (AFTER 3:30PM) Dispatcher before creating the FTT to plan for Field Service or After Hours Services to handle the turn on requirement. Any calls after 5:00PM should go to afterhours immediately.		
If a Dispatched Field Activity is canceled and replaced with another Field Activity for the same day, you should email the Dispatchers to inform them that the Field Activity you created is replacing the one that you canceled.		

Hazardous Meter Box

Meter Box issues or Damaged/ Missing Meter Lid:

If the customer advises that their meter box or lid needs replacing, advise the customer that it will be repaired or replaced during our normal maintenance cycle.

If the customer advises that they are concerned about someone being injured or it presents an immediate safety hazard, create a Hazardous Meter Box/Lid Replacement Field Activity.

- Schedule for next business day except on Fridays
- **Can take 30 days to replace**
- Select Line Maintenance under the Recipient drop down.

The screenshot shows a software interface for creating a field activity. The window is titled "Main" and contains the following fields:

- ACTIVITY TYPE:** Field Activity
- SERVICE DATE TIME:** 07-18-2022, 12:00:00AM EDT
- PARENT ACTIVITY:** (empty)
- SERVICE POINT:** 145389338900, 11742 ALBATROSS LN, RIVERVIEW, FL, 33569 / WA/WW RESIDENTIAL Meter Size <= 1-1/2" / Cycle 17, Rivercrest III / Active
- EXTERNAL SERVICE POINT ID:** (empty)
- FIELD TASK TYPE:** Hazardous Meter Box/Lid Replacement
- APPOINTMENT WINDOW DATE TIME:** (empty)
- APPOINTMENT END DATE TIME:** (empty)
- TAKEN BY:** (empty)
- TAKEN DATE:** (empty)
- COMMENTS:** (empty)
- RECIPIENT:** (empty)
- COMMENTS:** (empty)
- INSTRUCTIONS:** BROKEN LID
- REQUESTER:** (empty)
- REQUESTER TRANSACTION:** (empty)

Chapter Sixteen: Line Maintenance

Emergency Number

We have an emergency number that our customers can call with Water & Wastewater related issues: 24 hours a day, 7 days a week.

The number (744-5600) is answered as follows:

Monday – Friday except for County Holidays

7:00am – 3:30pm: Line Maintenance

3:30 pm – 7:00 am: PUD After Hours Customer Service

Saturday – Monday AM plus County Holidays

Saturday 7:00 am until Monday 7:00 am: PUD After Hours Customer Service

Flushing of Line

The Line Maintenance team oversees flushing out both Water & Wastewater transmission lines whenever necessary.

Some examples where line flushing is necessary:

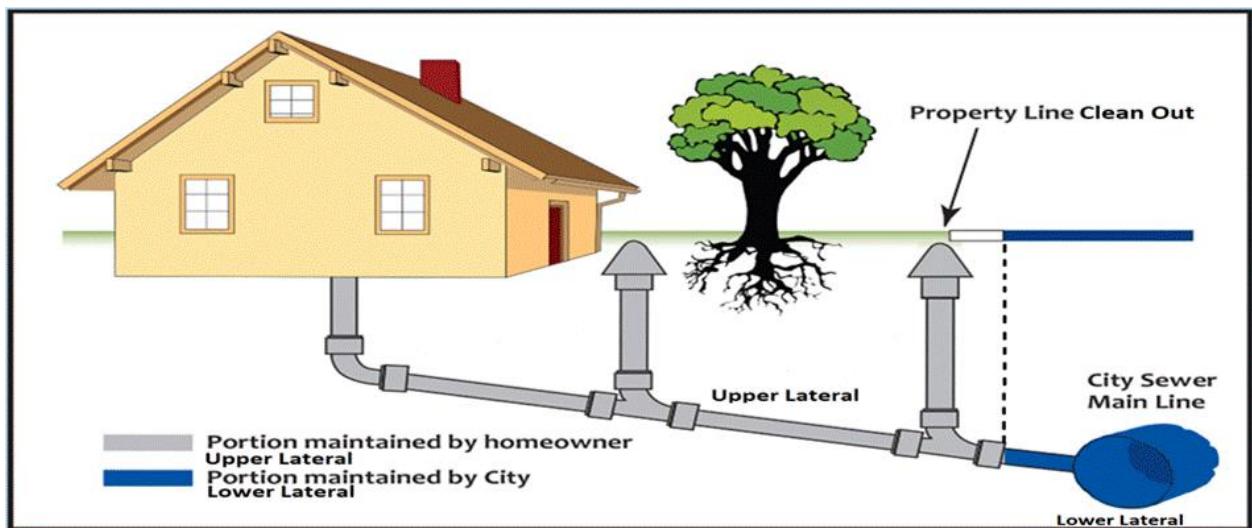
- A customer lives at the end of a cul-de-sac which is also the end of a water line. The water at the end of the line can become stagnant if not flushed on a regular basis.
- A sewer customer complains that there is an unwanted visitor in their toilet (frog, snake, etc.). The appropriate sewer line will be flushed to help eliminate this problem in the future (the customer must dispose of the toilet visitor themselves).
- A water line becomes contaminated for whatever reason and the line must be flushed.
- UDF = Uni-Directional Flushing

County or Customer Sewer Issue

When a customer calls in regards to **sewer backup**:

Steps:

- Have the customer locate the sewer cleanout
- Have the customer remove the cap and look into cleanout



Have the customer verify if the issue is on the county or customer side.

- If it's *dry* that means nothing is going through the cleanout, so the blockage is on the **customer's side**. Customers will need to fix the blockage themselves.
- If there is *water* in the cleanout, then the sewer is going through the cleanout which means there's a blockage on the **county's side** causing the backup. (Refer calls to line maintenance)

Meter Change Out

The customer is calling to get an update as to when their dead meter will be replaced:

Screenshot of an Outlook message window titled "Meter change out/dead meters - Message (HTML)".

Message ribbon: File, Message (selected), Help.

Message ribbon icons: Delete, Archive, Share to Teams, Quick Steps, Move, Tags, Editing, Immersive, Zoom, Viva Insights, Report Message, Protection, Reply with Meeting Poll, FindTime.

Message content:

From: Reed, LaKenya

To: Adkins, Kay; Agostini, Paula; Carnegie, Josh; Cleveland, Nekaybaw; Davis, Eve; ElGebali, Sherri; Johnson, Tonji; Joyner, Kashaunda (Nikki); Smith, Trena; Stevens, Stacey; Thomas, Yarmilia; Walker, Donnetta; Whittington, Michele

Cc: Kruger, Shirley

Date: Fri 8/12/2022 12:31 PM

Importance: High

Message body:

Billing is not able to give an ETA or expedite the input of meters. They are handling customers just like we are on a case by case bases and mostly admin referrals. If you have a customer that has a dead meter and is existing it be changed out , please refer it to a supervisor to review and possible handle. At this time we will have to continue to advice the customers that we are in short supply of meters and will change them out as quickly as we receive them. Unfortunately we do not have ETA's currently. Please apologize and try to assist the customer as best you can.

Please do not send billing any emails in regards to when a meter will be changed out

Thanks
LaKenya Reed
Customer Response Manager- Enterprise Solutions
Water Resources Department

P: (813) 964-2737
E: Reedl@HCFGov.net
W: HCFGov.net

Hillsborough County Public Utilities Administration

Smoke Test

Smoke testing is a safe, efficient, and cost-effective method to look for places where breaks and cracks may be allowing rainwater into the sanitary sewer system. Excessive amounts of stormwater can overburden wastewater treatment plants, which end up unnecessarily processing clear water. That costs money, wastes resources, and takes up capacity meant to last for years. The testing also can reveal areas around a home or building where improper connections to the sewer system are made, as well as identify possible sources of sewer odors.



LPSS: Low Pressure Sewer System

How it works: Wastewater flows into a tank with a pump that pumps the wastewater into a low-pressure force main. The LPSS tank holds the solids just like a septic tank. The solids are pumped out every couple of years as part of preventive maintenance. A control panel and breaker (disconnect) are mounted on the side of the building next to the TECO meter.

We are responsible for the maintenance and operation of the LPSS tank system and electrical up to and including the control panel and disconnect.

If a customer calls because the red light is on or the alarm is going off on the control panel, please transfer them to the appropriate line maintenance office. The customer may also call to advise that the bulbs are burned out and need to be replaced.

Primary Areas with LPSS: Wimauma & Ruskin

Neptune 360

Neptune 360 (aka Smart Meter)

As of recently, Hillsborough County started replacing old analog meters with AMI smart meters. Though only about 60,000 of our customers have these, the plan is for every HCWD customer to have one installed eventually.



Old
Meter



New
Meter

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Smart Meter

With these smart meters we have a more precise reading on the water usage happening, but we can also better assist our customers when it comes to solving issues with high usage. This is because with the smart meter, we can tell down to the hour how much water is being consumed at a premise daily.

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How to Identify a Smart Meter

Premise Information

2878 QUAIL CREST CT, VALRICO, FL, 33594, SFH (Sub QUAIL CREST)

CIS Division: OHCRWS
Certificate of Occupancy Date (YYYY-MM-DD): 2022-11-02
Connection Fee Payment Method: Cash Payment Program
Service Area: East
Number of Water Units: 1
Number of Wastewater Units: 1
Service Point Information: 2878 QUAIL CREST CT, VALRICO, FL, 33594 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 09, Cliffdale / Active / 701133512
Device Configuration: Next Meter Read: 07-15-2024 00:00:00AM / Cycle 09 - Expected Work Date: 07-16-2024
Last Measurement: Value: 84.000000, Regular 07-07-2024 12:00:00AM EDT, Measurement: 562,257, Previous Measurement: 562,173

Premise Information

2878 QUAIL CREST CT, VALRICO, FL, 33594, SFH (Sub QUAIL CREST)

CIS Division: OHCRWS
Certificate of Occupancy Date (YYYY-MM-DD): 2022-11-02
Connection Fee Payment Method: Cash Payment Program
Service Area: East
Number of Water Units: 1
Number of Wastewater Units: 1
Service Point Information: 2878 QUAIL CREST CT, VALRICO, FL, 33594 / WA/WW RESIDENTIAL Meter Size <= 1-1/2 / Cycle 09, Cliffdale / Active / 701133512
Device Configuration: Next Meter Read: 07-15-2024 00:00:00AM / Cycle 09 - Expected Work Date: 07-16-2024
Last Measurement: Value: 84.000000, Regular 07-07-2024 12:00:00AM EDT, Measurement: 562,257, Previous Measurement: 562,173

Favorite Links

- To Do + [1]
- Customer Contact + [2]
- Pay Plan + [3]
- Online Utility Exchange [4]
- IWR Website [5]
- Water Wastewater Provider [6]
- Property Appraiser Website [7]
- Watering Restrictions [8]
- Solid Waste [9]
- CAMS
- BI Publisher
- Neptune 360 Portal

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Creating a Neptune 360 CSR Account

Amongst all the other accounts that will need to be created when you start, this is one your supervisor or analyst will start for you. Once they contact line maintenance management, Neptune 360 will directly email you your log-in information.

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How to Access Neptune 360

The screenshot shows the Neptune 360 Portal login interface. On the right, there is a large logo for 'NEPTUNE 360' with a stylized wave graphic. To its right is a login form with fields for 'Email' (dormana@hcfl.gov), 'Password', a 'Remember my email' checkbox, and a 'Forgot your password?' link. Below the form is a blue 'Login' button. On the left, a sidebar menu is displayed with various options like 'Customer Contact', 'Pay Plan', 'Online Utility Exchange', etc., followed by a section titled 'BI Publisher' which contains a link to the 'Neptune 360 Portal'. This link is circled in red. A red arrow points from this circled link down towards the main login area.

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Neptune 360 Dashboard

The screenshot shows the Neptune 360 Dashboard. At the top, it says 'WELCOME ALEXANDRA, Hillsborough FL County Of - 10728'. Below this is a search bar with 'Account Number' and 'Search Customer Accounts' placeholder text. A red arrow points upwards from the bottom of this search bar towards the top of the dashboard. The dashboard features several sections: 'DASHBOARD' (with a statistics icon), 'CUSTOMER INQUIRY' (with a magnifying glass icon), 'DATA LOG' (with a bar chart icon), 'GROUPS' (with a group icon), 'BILLING SERVICES' (with a mail icon), 'USER MANAGEMENT' (with a person icon), 'UTILITY MANAGEMENT' (with a gear icon), 'REPORTS' (with a chart icon), and 'COMMUNICATION SCHEDULER' (with a communication icon). Each section has a brief description below its icon.

When you log in and get to the dashboard, this will be the screen you see. The only thing needed here will be the search bar using the account number filter.

Copy and paste the account number from CCS for the account in question.

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Customer Inquiry

BLANDON,JHON F [Account Status | Active](#)

Account Number 3148700000	Current Meter Information MU ID More MUs >> 702806164	MU Status Active	Endpoint Type LoRaWAN Endpoint i
Address 13242 PIKE LAKE DR RIVERVIEW, FL 33579 i	Meter Number More Meters >> 702806164	Meter Type Not specified	Meter Install Date Not specified
Latest Reading i 00620321	Meter Size 5/8"	Unit of Measure Gallons	Neptune 360 Multiplier 0.1 Default i
07/09/2024 8:00:00 AM			

From: To: [Readings](#)

Monthly Consumption Analysis

Date	Consumption
Jul '23	3,664
Aug '23	3,462
Sep '23	4,354
Oct '23	4,390
Nov '23	4,866
Dec '23	4,129
Jan '24	4,576
Feb '24	4,576
Mar '24	8,007
Apr '24	8,215
May '24	7,148
Jun '24	7,054
Jul '24	1,895

Comments

There are no comments.

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Customer Account Overview

Once you enter and search the account number, this screen with their water consumption information will pull up. Here you can see the months and usage in bar graph form, or underneath, in list form.

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Customer Inquiry

BLANDON,JHON F [Account Status | Active](#)

Account Number 3148700000	Current Meter Information MU ID More MUs >> 702806164	MU Status Active	Endpoint Type LoRaWAN Endpoint i
Address 13242 PIKE LAKE DR RIVERVIEW, FL 33579 i	Meter Number More Meters >> 702806164	Meter Type Not specified	Meter Install Date Not specified
Latest Reading i 00620321	Meter Size 5/8"	Unit of Measure Gallons	Neptune 360 Multiplier 0.1 Default i
07/09/2024 8:00:00 AM			

From: To: [Readings](#)

Monthly Consumption Analysis

Date	Consumption
Jul '23	3,664
Aug '23	3,462
Sep '23	4,354
Oct '23	4,390
Nov '23	4,866
Dec '23	4,129
Jan '24	4,576
Feb '24	4,576
Mar '24	8,007
Apr '24	8,215
May '24	7,148
Jun '24	7,054
Jul '24	1,895

Comments

There are no comments.

Customer Account Overview

Once you enter and search the account number, this screen with their water consumption information will pull up. Here you can see the months and usage in bar graph form, or underneath, in list form.

HCFL.gov

When you are looking over this information, there are a few customer issues it could help you solve:

1. High Consumption Questions
2. Leak Concerns
3. Irrigation History

Fire Hydrants

Fire hydrants are either County owned or privately owned

County fire hydrants have a yellow base with a different color top depending on the capacity of the hydrant:

- Blue top = 1500 gallons/minute
- Green top = 1000 gallons/minute
- Orange top = 500 gallons/minute
- Red top = less than 500 gallons/minute

- Privately owned hydrants are a solid color with the base and top both being red, yellow, or white.
- Customers can call to determine the closest fire hydrant to their home.
- These inquiries should be directed to a member of the Public Utilities Department engineering team via our main switchboard number (813-272-5977).

Chapter Seventeen:

Training Reviews

Feel free to use the chapter to answer these questions.

1. What are the programs CSRs should open first thing in the morning?

2. Around how many Hillsborough Water customer do we have?

3. What are you going to learn in CSR 1 training?

4. What is CCS and what does it stand for?

5. What needs to be verified when you first start speaking to a customer?

6. Briefly explain the Sunshine Law:

7. Briefly explain the Red Flag Rule:

8. What would you argue are the 3 most important components of telephone etiquette?

9. What does BOCC stand for?

Chapter Two: Need to Know Review

Trainee: _____

Feel free to use the chapter to answer these questions.

1. What are the ways a Hillsborough County Water customer can make a payment?

2. How can a Hillsborough County water customer request services?

3. What is a Purchase Water Pass-Thru charge on the water bill?

4. What are the deposits we require? And in what situation would they not be required?

5. What calls require contact notes to be left on the account by the CSR?

6. What does the abbreviation “LK/ADJ” stand for?

7. What is the fee for a same day turn on service? What about a customer requested meter read?

8. Notes are always left in uppercase letters. Circle **True or False**

9. What is the website where customers can go to make their payment?

10. The fee to make your payment at Amscot is \$2. Circle **True or False**

11. What do we tell the customer regarding the credit check?

Chapter Three: New Service Procedures Review Trainee: _____

Feel free to use the chapter to answer these questions.

1. What are the three services we offer our Hillsborough County water customers?

2. What are the ways you can look up an account?

3. What do you say to the customer when you first pick up the phone?

4. What do you need to start a new account?

5. What can a customer do on their online account? What is that web address?

6. When starting a new service, what do you choose as the Bill Route Type?

7. What are the three types of turn ons?

8. What are the qualifications to waive a deposit for a previous customer?

9. At what point can customers request their deposit to be refunded to their account?

10. When transferring a service with a deposit, who does the To-Do go to?

11. What is the standard set up fee? What about the fee to stop a service?

12. In your own words, what is a To Do?

13. What do you need to ask the customer about updating at the end of a stop call?

14. What can a non-authorized person do on a customers account?

15. When a customer has three different premises, they have three different account numbers. Circle **True or False**

16. How would you describe a Match with Move?

17. With unauthorized usage, what must happen before the new customer can start service?

18. WRI stands for Water Running Inside. Circle **True or False**

19. 3rd Trip WRI are at no cost to the customer. Circle **True or False**

20. Who does a same-day WRI trip email go to?

21. What are the other water service providers within Hillsborough County lines?

22. Where in CCS would you find how many service points a premise has?

23. Why is it important to check the alerts on an account in CCS?

24. In CCS, what customer information is within the Current Context section? _____

Feel free to use the chapter to answer these questions.

1. What do IVR and IWR stand for?

2. The IVR phone line is very responsive and can work through background noise.
Circle **True** or **False**

3. How should customers dial in their payment when using the IVR?

4. What is the difference between IWR and IWR Admin?

5. Someone calls to have help locating their username. How do you assist?

6. Every time you press submit on IWR Admin, it provides you with a new temporary password. Circle **True** or **False**

7. What is important for the customer to know about creating a username?

8. How long does it take for auto pay to take effect? Does signing up for auto pay automatically make billing paperless?

9. When customers call in, what are the three options they are offered to choose from as far as connecting to a CSR?

10. Passwords can be reused on IWR. Circle **True** or **False**

11. If a customer is having trouble, you are able to test their log in process for them on your end. Circle **True** or **False**

Chapter Seven: Customer Bill View Review Trainee: _____

Feel free to use the chapter to answer these questions.

1. What is the difference between OnBase and CCS?

2. OnBase can be accessed on its own, or within CCS. Circle **True or False**
3. CSRs can send a customer their bill via email from OnBase. Circle **True or False**
4. Where do you click in CCS to access the display bill button?

5. What is the process for pulling up a bill straight from OnBase?

6. The bill we access in OnBase is the same exact bill that the customers receive.
Circle **True or False**
7. What might customers call in for that require you to access their bill?

8. Do customers have access to OnBase on their end? If not, how can they view their bill?

Feel free to use the chapter to answer these questions.

1. What are the four trend areas when estimating a bill (and in general)?

2. If a customer is calling about a 0-usage bill, where in CCS do you look to confirm that?

3. If a customer calls about an incorrect meter reading, you as the CSR are not allowed to tell the customer to go out and read the meter themselves.

Circle **True** or **False**

4. When a customer is signed up for auto pay, what are the two methods for auto pay that you will see?

5. CSRs can modify a customer's autopay. Circle **True** or **False**

6. What is the main identifier for a rebill situation?

7. When you see a Pending Bill in the Alerts section of an account on CCS, what would require a To Do to be sent? And who would it be sent to?

8. Why would a customer request to have their autopay bill message deleted?

9. What circumstances call for a bill cycle change?

10. All customers are eligible for late fee waivers. Circle **True** or **False**

11. Water Usage calculators are only available for CSRs, not customers.

Circle **True** or **False**

Feel free to use the chapter to answer these questions.

1. Using IWR, customers can change their paperless settings themselves.
Circle **True** or **False**

2. When looking at the Bill Print Intercept field, how do you know if a customer is paperless?

3. There are only 5 steps to remove paperless billing for a customer.

Circle **True** or **False**

4. What are the two options for Bill Route Type?

5. If the characteristic value for the email notification characteristic type has an "A" next to it, what does that mean?

6. CSRs must set up every new customer on paperless billing. Circle **True** or **False**

7. What does Bill Print Intercept mean?

Feel free to use the chapter to answer these questions.

1. Customers are alerted about service interruption when their bank returns the payment. Circle **True or False**
2. What payments don't qualify for reversal?

3. What payment method has the longest reversal window?

4. What information is needed to research a payment for a customer?

5. If a customer has a "Cash Only" status, what does that mean?

6. What is the hold time for E-box payments reversals?

7. What would the fee range be for a returned check that is around \$38?

8. CSRs cannot cancel payments. Circle **True or False**

9. What are the cash-only status exceptions?

10. What department does the To-Do go to when requesting a refund?

Feel free to use the chapter to answer these questions.

1. What are the main differences between a payment arrangement and a pay plan?

2. What makes an account ineligible for a pay plan?

3. Bills stop coming once an account is in a pay plan status. Circle **True or False**

4. What does the credit scores/rating on an account mean?

5. CSRs don't have the ability to create a pay plan. Circle **True or False**

6. Where are you able to tell that a pay plan is active in CCS?

7. What type of pay plans aren't used in customer service?

8. What other department deals with pay plans and payment arrangements?

9. What do you as the CSR do if the customer says they can't make their pay plan payment?

10. Pay plans waive late fees. Circle **True or False**

11. Where is the link to set up a Pay Plan found?

Chapter Twelve: To Dos Review

Trainee: _____

Feel free to use the chapter to answer these questions.

1. What is a To Do? What purpose do they serve?

2. What are the main components of a To Do?

3. What department does a lost refund check To Do get sent to?

4. When a customer provides an accurate reading after a system estimate, what department gets that To Do?

5. What department(s) get the majority of the call centers To Dos?

6. How do CSRs waive late fees? What is the requirement?

7. What needs to be in the subject of a To Do?

8. An account was closed but they have a new address they didn't previously have at the time of stopping service... what now?

9. If an account needs to be backdated, the To Do needs to be sent to Credit Management. Circle **True or False**

10. When dealing with a misread, what should be included in the To Do?

Chapter Thirteen: Emails Review

Trainee: _____

Feel free to use the chapter to answer these questions.

1. What emails need to have analysts CC'd?

2. What needs to be in the subject line for Field Service Dispatcher emails?

3. Write Off emails need to have all of the information in the body of the email.

Circle **True or False**

4. What are the 3 types of emails sent to payments?

5. What is the process for an escalated customer call? (Aka highly concerned customer)

6. What situations require an email for field service dispatch?

7. Are CSRs supposed to email customers? If you do, why BCC your analyst/supervisor?

8. Time off doesn't need to be sent over email, just call/voicemail. Circle **True or False**

9. Emails and To Dos are the same thing. Circle **True or False**

10. What is the all-supervisor email address?

Chapter Fourteen: Same Day Service Review Trainee: _____

Feel free to use the chapter to answer these questions.

1. What is the final step in an Emergency Turn Off?

2. What is one question you could ask a customer that has an active account with no water?

3. What is the field activity code for a turn on after repairs?

4. What does Water Running Inside (WRI) mean?

5. Translate this comment: T/ON RD 6982/76--9033/16 WATER IS OFF AT CHV LEFT SIDE OF HOME GRAY HANDLE N/M/M

6. There is no fee for a 3rd WRI trip. Circle **True or False**

7. On the severance timeline, on what day does the severance process start? What day of the timeline does the internal credit score lower?

8. What is the same day turn on fee? In what situation can a customer **NOT** receive a same day turn on?

9. What could be a reason that a severance would be cancelled?

10. On the 44th day of the severance process, the second bill is released.
Circle **True or False**

Chapter Fifteen: Field Activity Review Trainee: _____

Feel free to use the chapter to answer these questions.

1. What does hazardous meter box mean?

2. If the issue is on the customers side, what does that mean for the customer as opposed to it being a county issue?

3. Where can you find the current days dispatch list? What are the four areas/zones?

4. A hazardous meter repair can take up to 2 weeks maximum. Circle **True or False**

5. Premise Investigations can be set up any day of the week. Circle **True or False**

6. What situations call for same day field activities?

7. What information needs to be filled in for a Field Activity?

8. What is a pre-tag notice?

9. Where would you find if a premise has one or two meters?

10. After 3:30pm, all field activities that are set up need to be approved by direct reports.

Circle **True or False**

Chapter Sixteen: Line Maintenance Review Trainee: _____

Feel free to use the chapter to answer these questions.

1. Why would a line need to be flushed?

2. What does UDF stand for?

3. If there is water in a sewer cleanout, what does that mean?

4. What are the current ETAs for meter change outs?

5. What does a smoke test do?

6. Neptune 360 is the software for our analog water meters. Circle **True or False**

7. What is an LPSS?

8. How do you know if a fire hydrant is public or private?

9. In Neptune 360 you can see the customers water usage down to the second. Circle **True or False**

10. The emergency number is 813-276-8526. Circle **True or False**

Appendix

Core Values



**Hillsborough
County Florida**

Core Values Summary

Core Values	Behaviors
Customer Commitment <i>Proactively seeks to understand the needs of our customers and provide the highest standards of service.</i>	<ul style="list-style-type: none"> Identifies both internal and external customers Listens and asks questions to understand customers' needs Provides services to customers in a respectful manner Makes the customer feel valued Strives to exceed customer expectations Follows through on service commitments Strives to understand and contribute to customer satisfaction measurements Takes responsibility to resolve customer concerns Identifies opportunities for service improvement Makes the customer interaction a positive experience
Success Through Teamwork <i>Collaborates and builds partnerships through trust and the open exchange of diverse ideas and perspectives to achieve organizational goals.</i>	<ul style="list-style-type: none"> Asks for other's ideas and perspectives Offers and asks for help as needed Treats others with respect Listens before responding Communicates openly and honestly Keeps others informed Shows sensitivity to individual differences Treats others equitably Seeks to resolve team conflicts Encourages others Looks for ways to develop others and share knowledge Works with team members towards a common goal Supports group decisions Follows through on commitments to the team Partners with others outside the team to achieve organizational goals
Organizational Excellence <i>Takes ownership for excellence through one's personal effectiveness and dedication to the continuous improvement of our operations.</i>	<ul style="list-style-type: none"> Actively seeks process improvement opportunities Works effectively to meet or exceed goals Achieves results with focus on both efficiency and quality Supports and adapts to change Considers benefits and risks when making decisions Uses time and resources wisely Organizes and prioritizes work Is proactive Maintains and builds skills supporting effectiveness in position Demonstrates necessary job skills and knowledge Demonstrates an openness to learning, change and growth Identifies own strengths and areas for improvement Seeks feedback Learns from successes and failures
Dedication to Professionalism & Integrity <i>Demonstrates and promotes fair, honest, professional and ethical behaviors that establishes trust throughout the organization and with the public we serve.</i>	<ul style="list-style-type: none"> Admits mistakes Tells the truth Takes responsibility for actions Reports concerns about inappropriate action and/or behaviors Respects confidentiality Models professional behaviors and attire Acts in the County's best interest Represents self and organization accurately and honestly

Mission, Vision, Outcomes



**Hillsborough
County Florida**

The Five Strategic Outcomes

The County has identified five strategic outcomes, illustrated below, that together will achieve the ultimate goal of building prosperity for individuals and the community, while providing stellar customer service and satisfaction that contribute to a positive quality of life.



Mission Statement

Provide effective services that enhance our customers' quality of life

Vision Statement

Create the opportunity for community prosperity

Job Description



**Hillsborough
County Florida**
Human Resources

Job Classification: **Customer Service Representative**
Classification group: **Classified Non-Union**
Pay Schedule: **General**
EEO4 Category: **Paraprofessional**

CLASSIFICATION/JOB DESCRIPTION

Job Overview

This position is responsible for resolving routine to complex or escalated customer service matters and performing front-line customer service duties in call centers, offices, and customer intake areas.

Core Competencies

- **Customer Commitment** - Proactively seeks to understand the needs of the customers and provide the highest standards of service.
- **Dedication to Professionalism and Integrity** - Demonstrates and promotes fair, honest, professional and ethical behaviors that establishes trust throughout the organization and with the public we serve.
- **Organizational Excellence** - Takes ownership for excellence through one's personal effectiveness and dedication to the continuous improvement of our operations.
- **Success through Teamwork** - Collaborates and builds partnerships through trust and the open exchange of diverse ideas and perspectives to achieve organizational goals.

<u>Tier 1</u> Pay Band: Office Support Pay Grade: CNUPP.1A	<u>Tier 2</u> Pay Band: Paraprofessional Pay Grade: CNUPP.2
<u>Job Distinctions</u> Under close supervision, this position will perform routine customer service functions in a call center environment.	<u>Job Distinctions</u> Under minimal supervision, this position performs routine to complex or escalated customer service matters and may serve as team lead for other customer service representatives in the department/work unit.
<u>Duties and Responsibilities</u> Note: The following duties are illustrative and not exhaustive. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Depending on assigned area of responsibility, incumbents in the position may perform one or more of the activities described below:	<u>Duties and Responsibilities</u> Note: The following duties are illustrative and not exhaustive. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Depending on assigned area of responsibility, incumbents in the position may perform one or more of the activities described below:

Job Specifications

- Knowledge of standard call center operations and customer service best practices.
- Skill in the use of service-oriented phrases and techniques to achieve resolution.
- Skill in listening actively to discern customers' needs.
- Ability to evaluate customer information to determine course of action.
- Ability to communicate effectively both orally and in writing.
- Ability to work effectively with others.
- Ability to perform accurate computations and verifications of data.
- Ability to use computer and software to quickly and accurately enter data.

- Uses office equipment and software to receive and respond to customer requests and complaints, document needs and concerns, and refer customers to other parties.
- Establishes and updates customer records, makes account adjustments, and processes payments.
- Demonstrates exemplary customer service skills and etiquette while communicating with customers both verbally and in writing.
- Schedules services and/or dispatches service providers based on set parameters. Communicates with operational teams at designated times and when changes will affect work plans and/or customer needs or solutions.
- Operates systems and software to find, verify, and enter information, distribute information or correspondence, and to track/report time spent on various tasks.
- Reconciles/updates customer accounts, funding sources, and billing systems.
- Applies designated procedures, guidelines, tools, and resources to accomplish job duties.
- Coordinates with other departments, organization, or service providers based on customer needs and established guidelines.
- Follows up with customers at designated frequency, intervals or sets of circumstances to give updates, provide notification or guidance, and request information or feedback.
- Provides customer service support or related duties when required by the Office of Emergency Management.

Physical Requirements

- Employees will be in an office environment in a sedentary position.

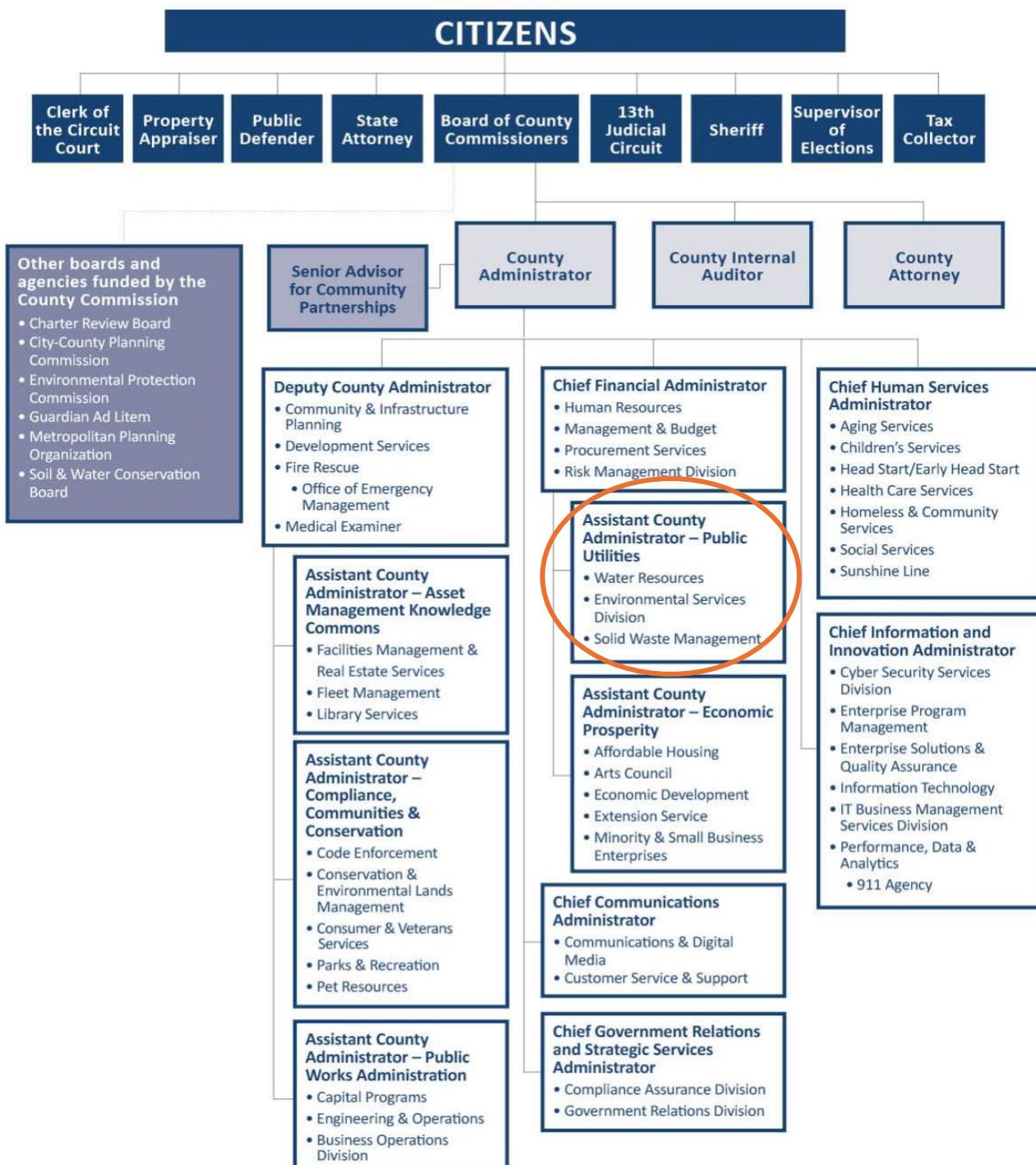
Work Category

- **Sedentary work** - Exerting up to 10 pounds of force occasionally, and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally, and all other sedentary criteria are met.

Organization Chart

Hillsborough County Organization Chart

This chart shows the organization of County government entities and their accountability to the electorate. Those directly elected to office by voters are shown directly below the citizens' box. Boards and commissions funded through the Board of County Commissioners, but not otherwise accountable to the Board, are connected by the dotted line.



Human Resources Directory

EMPLOYEE EXPERIENCE DIVISION																																		
Kurt Wilkening, Div Director		276-2752	64752																															
Employee Engagement																																		
Karina Ortiz 277-1693 64993 Suzie Frazer 274-1692 64692																																		
PEOPLE OPERATIONS DIVISION																																		
Maria Liddy, Div. Director		272-6216	64216	Gerry Geoghegan 635-8277 64277																														
Michael Drago		274-6768	79768	Erlinda Ashbrook 307-4482 64482 Richard Mack 277-1652 64652																														
Benefits																																		
 <table> <tr> <td>Becky Buehrle</td><td>276-2728</td><td>64728</td><td colspan="2">Learning & Organizational Development</td></tr> <tr> <td>Jeressa McLaughlin</td><td>307-8334</td><td>64734</td><td colspan="2">Jacqueline Phillips 276-2730 64730</td></tr> <tr> <td>Leeanne Smith</td><td>274-6775</td><td>79775</td><td colspan="2">Jean Slepecky 276-8352 64152</td></tr> <tr> <td>Michelle Suttle</td><td>276-2520</td><td>64520</td><td colspan="2">Doug McDonald 276-2471 64471</td></tr> <tr> <td>Sandra Cochran</td><td>276-8313</td><td>64996</td><td colspan="2">Robert Homeier 301-7057 64057</td></tr> <tr> <td>Tisha Wardlow</td><td>276-2840</td><td>64840</td><td colspan="2" rowspan="2">Tracy Duncan 276-2192 79761</td></tr> </table>					Becky Buehrle	276-2728	64728	Learning & Organizational Development		Jeressa McLaughlin	307-8334	64734	Jacqueline Phillips 276-2730 64730		Leeanne Smith	274-6775	79775	Jean Slepecky 276-8352 64152		Michelle Suttle	276-2520	64520	Doug McDonald 276-2471 64471		Sandra Cochran	276-8313	64996	Robert Homeier 301-7057 64057		Tisha Wardlow	276-2840	64840	Tracy Duncan 276-2192 79761	
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Occupational Health																																		
Terri Arias		301-7050	64050	Renée McCummings 276-8353 64153																														
Rosemary Kisiel		274-6567	64567																															
Thomas Johnston		276-8573	64573	Ron Simon 274-6770 79770																														
Linda Thompson		276-8454	39909	Acuelyn Kindred 276-8174 64174																														
Patrick Collins		274-6771	79771	Hannah Powell 635-7460 38560																														
Sharon Allen		301-7055	64055	Keysha Carter 274-6766 79766																														
Taneisha Hancel		274-6556	64556	Ricardo Rosario 274-6792 64792																														
SPPA																																		
Steve Fischer		276-2755	64755	FISCAL MANAGEMENT																														
Oscar Rodriguez		272-6651	64651	Bindi Shukla 276-2750 64750																														
Specialty Processing																																		
Simone Smith		274-6769	79769	Paul Almeida 829-2768 64998																														
Danielle Watson		274-6751	79751	Richard Rose 276-2756 64756																														
Lawrence Bryant		276-2004	64064	Tabitha Laidler 277-1664 64664																														
Nickole Miller (Lead)		276-2890	64890	Erika Brown 276-8794 64794																														
Sicilia Campbell		274-6773	79773	Vanessa Duffy 301-7053 64053																														
People Analytics																																		
Ken Callwood		276-2732	64732	CIGNA HEALTH																														
Ashton Mincey		307-1731	41731	Bindi Shukla 276-2750 64750																														
Felicia Freeman		277-1609	64609	Paul Almeida 829-2768 64998																														
Judy Zackery		635-8280	64280	Richard Rose 276-2756 64756																														
Maria Ortiz		274-1909	64909	Tabitha Laidler 277-1664 64664																														
Total Compensation																																		
Mathew Verghese		276-2736	64736	Erika Brown 276-8794 64794																														
Charmaine Walker		276-2746	64746	Vanessa Duffy 301-7053 64053																														
Priscilla Marzi		274-1661	64061	DEFERRED COMPENSATION VENDOR REPRESENTATIVE																														
Carrie Renberg		307-1716	41716	Adam Lainey (RN) 727-401-1807																														
Jack Loring		274-6759	79759	Cindy Rivera (Coach) 813-210-7056																														
Patricia Navarro		274-6755	79755	Employee Medical Center 813-274-6791																														
Ryan Rothman		276-2841	64841	e-mail: HCEMC@evernorth.com																														
Wellness																																		
Cheryl Murphy		274-6777	79777	CIGNA REPRESENTATIVE																														
Victoria Elrod		635-8054	38554	Karole Mingarelli 813-276-2850																														
 																																		
e-mail: Karole.Mingarelli@Cigna.com																																		
EFP VOLUNTARY BENEFITS																																		
Julie Bowers (Case Manager)		860-918-1505	FLORIDA RETIREMENT SYSTEM																															
e-mail: jbowers@efpnow.com		866-446-9377	Financial Guidance Line																															
FAX NUMBERS																																		
HR Employee & Labor Relations 272-7142																																		
HR Leave Management 276-2884																																		
HR Employee Benefits 272-1160																																		
HR Workers Comp 276-2884																																		
HR FRONT DESK 813-272-5130																																		
HR questions? Email us at AskHR@HCFL.gov																																		
IIO Service Desk 813-274-4357 7am - 5pm																																		
COUNTY CENTER SECURITY 813-276-2213																																		
Appeals Intake 813-274-1626 X. 64626																																		
Fraud & Misconduct Hotline 813-274-6547																																		

Training Objectives

1. Ensure agents have a deep understanding of the services offered by the WRD.
2. Enhance verbal and written communication skills to effectively interact with customers.
3. Train agents to listen attentively to customer inquiries and concerns.
4. Equip agents with the ability to identify and resolve customer issues efficiently.
5. Help agents prioritize tasks and manage their time effectively to handle multiple customer interactions.
6. Provide strategies for de-escalating conflicts and resolving disputes with customers.
7. Familiarize agents with the call center technology, including CRM systems, call routing software, and troubleshooting tools.
8. Ensure agents understand regulatory requirements and security protocols when handling customer data.
9. Teach agents professional phone etiquette, including greeting customers, managing hold times, and ending calls courteously.
10. Educate agents on the importance of maintaining quality standards in every customer interaction.
11. Provide mechanisms for ongoing feedback and coaching to help agents improve their performance continuously.

Training Questions

1. What training aspects were most helpful for your role?
2. Which training materials or resources did you find most beneficial?
3. How effective were the hands-on practice sessions for real customer interactions?
4. Did you receive sufficient support from trainers? What was most valuable?
5. What areas of the training could be improved or expanded?
6. Have you faced challenges applying training in customer interactions? How did you overcome them?
7. Were the sessions on company policies clear? What needed more emphasis?
8. How has your understanding of the service evolved during training?
9. What strategies from training have been effective in handling difficult customers?
10. How has your training experience impacted your confidence in your role?