NOTE:
The following procedure is for the 24-Hour Disconnect Notice process. Customer payments have occurred since the 10-day Notice mailed.

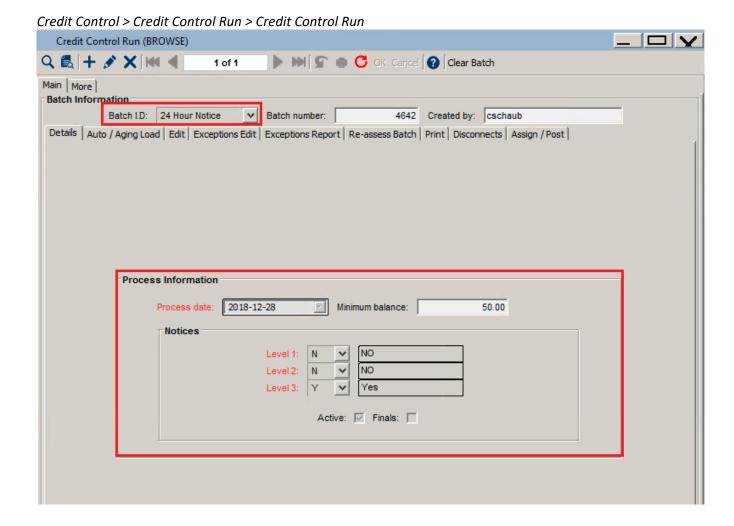## Selecting / Creating A Batch

Use the **Add** icon (**+**), create a new batch.

Select the **24 Hour Notice** from the Batch ID dropdown menu.

Credit Control > Credit Control Run > Credit Control Run

Credit Control Run (BROWSE)

🔍 📑 ➕ ✏ ✖ ⏮ ◀   1 of 1   ▶ ⏭ ↺ 🖶 ↻ OK Cancel ❓ | Clear Batch

Main | More
Batch Information
Batch I.D.: [24 Hour Notice ▾] Batch number: [4642] Created by: [cschaub   ]

Details | Auto / Aging Load | Edit | Exceptions Edit | Exceptions Report | Re-assess Batch | Print | Disconnects | Assign / Post

Verify all levels are set correctly. Level 1 and Level 2 are set to N. Level 3 is set to Y.

Click **OK** to save the Header and Process Information.

Process Information

Process date: [2018-12-28 ▾]   Minimum balance: [50.00]

Notices

Level 1: [N ▾] [NO]
Level 2: [N ▾] [NO]
Level 3: [Y ▾] [Yes]

Active: ☑   Finals: ☐

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Auto-Load Procedure

Click on the **Auto/Aging Load** tab.
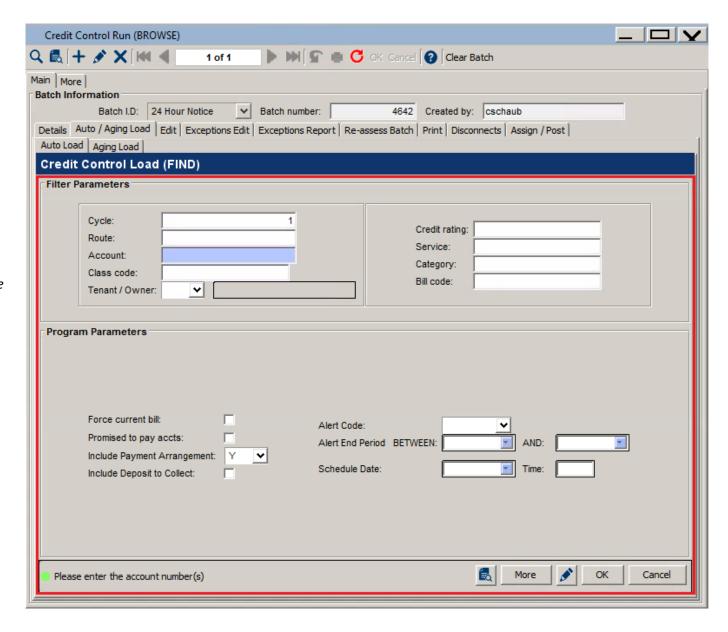
Select the **Auto Load tab**.

Click on the **Edit** icon.

Set the **Filter Parameters** and **Program Parameters** fields as required.

Note: This example is limited to Cycle 1 and has Include Payment Arrangements set to Y.

Click **OK** at the bottom of the screen to initiate the loading process.

Once the loading process has completed, proceed to the **Edit tab**.

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Edit the Loaded Batch

Click on the **Edit** tab to view the loaded accounts.

Customer payments applied during the time span of sending the 10-Day Notices to loading the 24-Hour Notice batch decreased the number of accounts from 311 to 295.

Review the Edit tab to make sure the number of accounts/dollar amounts are as expected.

Note: During the winter moratorium, create, load, and process as usual a Batch ID named WINTER: REMINDER. This will allow all flags to flip/update as needed to avoid forcing any current bills.

Note: Any information loaded into the batch may be updated, and groups of accounts may be found and deleted as a group by using the 'Group Delete' tab.
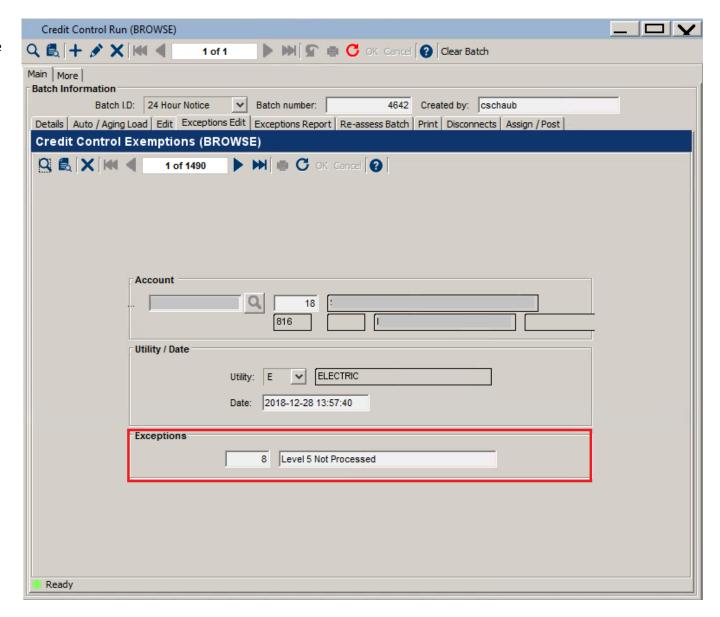
Deleting a service or account may prevent it from loading properly in future batches.

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Click the **Exception Edit** tab to view the accounts that did not pull into the Batch.

The reason for the exception displays at the bottom of the screen.

This example shows an account that did not load to the batch due to Level 5 not processing the prior month.

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Printing Notices/Letters

Navigate to the **Print** tab to generate the 24-Hour Notices or the file for a Robocall list.
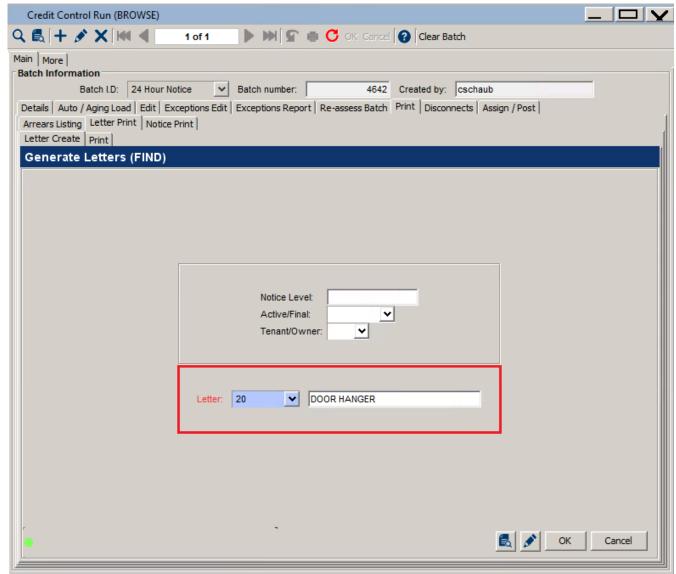
Click on the **Letter Create** tab.

Click the **Edit** icon in the lower right-hand corner of the screen.

Select the **Letter** number or code for the letter from the letter dropdown menu.

Click **OK** to accept the changes and begin the initial process to add the letter to Letter History.

Click **Close** after the letters have successfully completed loading to Letter History**.**

Credit Control > Credit Control Run > Print > Letter Print > Letter Create

9/26/2023

Click on the Letter Print > **Print** tab.

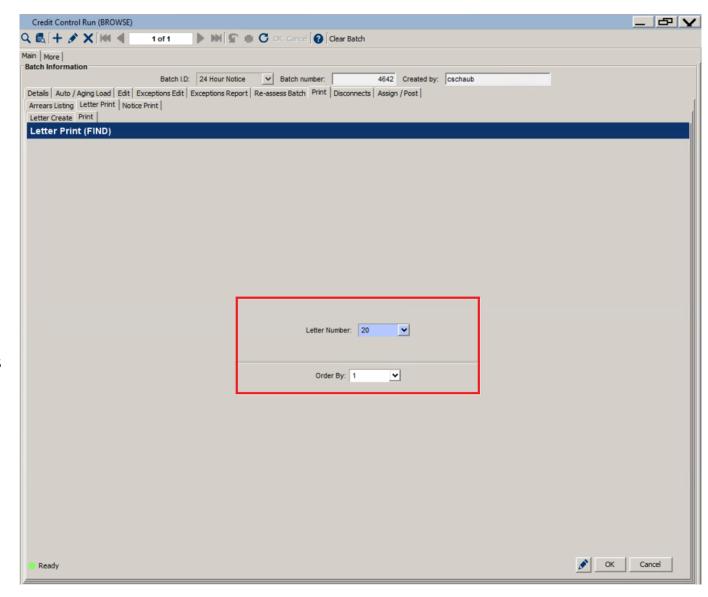Click the **Edit** button at the bottom of the screen.

Select the **Letter Number** to be printed.
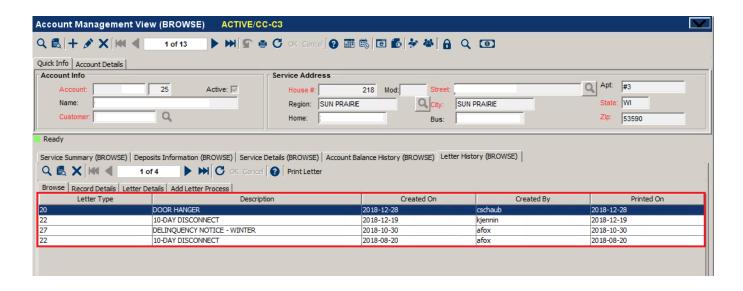
The **Order by** field will default to 1.

Click **OK** to save the changes and initiate the printing process.

The processing screen will appear. When the letters/notices are ready to print, they will appear on the **Results** tab. If a Mail Merge letter is used, MS Word will auto launch and the letters will appear in that software.

Non-Mail Merge letters require redirecting to the appropriate printer set to the portrait mode. Select Print to send the letters to the printer.

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After the 24-Hour Notices print, the notice will appear on the Letter History table in Account Gateway.

24-Hour Wait Period

PSC requires utilities to wait 24-hours after posting door hangers for receipt of additional payments from potential disconnect customers.

At the end of the 24-hour wait period, return to Credit Control to re-assess the 24-Hour Notices batch.

Batch Re-Assessment

Click **Re-assess Batch** tab.

Click the **Edit** button at the lower right-hand corner.

Select the same **Batch Type** that was auto-loaded for the 24-Hour Notices.

Check the **Apply Payments** box. This will apply any payments made and print the list.

Click **OK** to run the re-assess process.

Credit Control > Credit Control Run > Re-assess Batch

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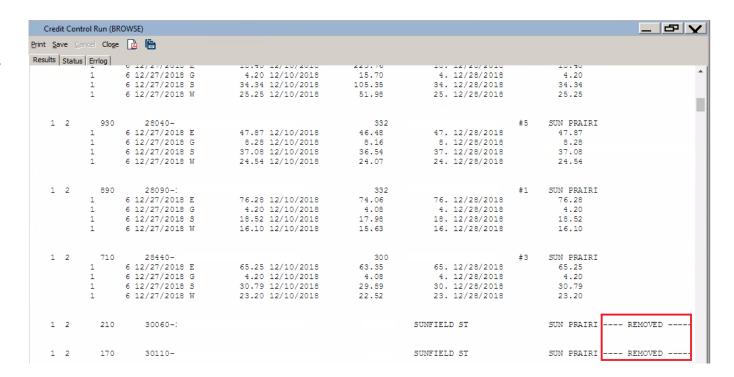
The Credit Control Run (Browse) window will open to display the status during the re-assessment. The status bar and 'Now Running xxx of xxxx' shows the number of services being re-assessed, not the number of accounts.

When the re-assess process completes, the report auto opens. The report will show the accounts as updated or removed based on payments received.
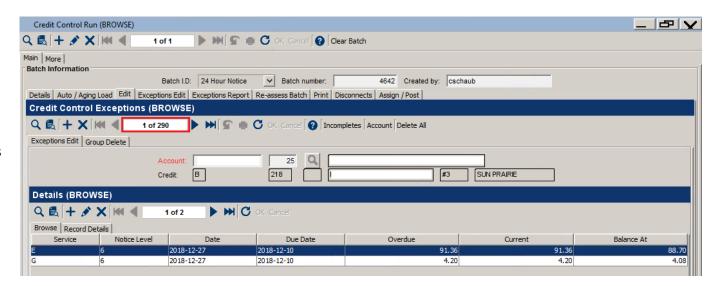
Review Re-assessed Batch

Return to the **Edit** tab.

Review the re-assessed accounts in the batch.

Note the total number of account in the 24-Hour Notice batch decreased by 5 accounts. The removed accounts paid their balances in full.

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Generate Disconnect Notices

The **Disconnects** tab is for creating service orders and/or charging disconnexct fees to accounts in the batch.

The **Generate Disconnects** tab is used if disconnect service orders are to be printed. This process only creates the notices. The user must go to the CARe module to print out the notices.

Click on the **Disconnects** tab.	*Credit Control > Credit Control Run > Disconnects > Generate Disconnects*

Click **Edit** at the bottom of the screen.

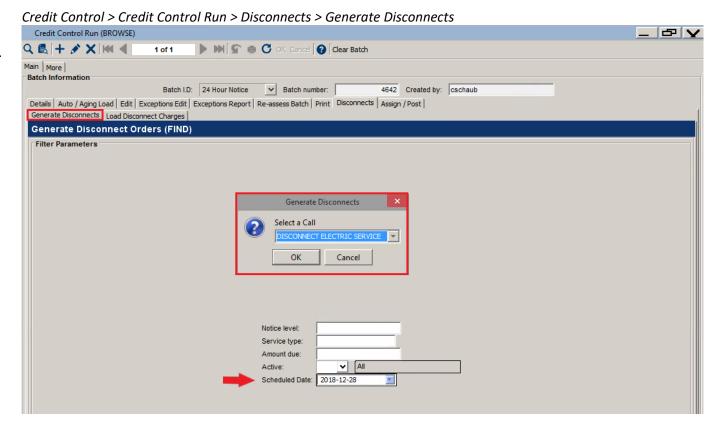Enter the **Scheduled Date** as the date of disconnection.

Click **OK**.

A pop-up window will appear.
Select the **Disconnect Service Order.**

Note: If no disconnect service order displays, contact WPPI for additional setup assistance.

Click **OK** to generate the service orders.

The processing screen will appear.
Click **Close** when it shows it has successfully completed. This will return the user to the batch.
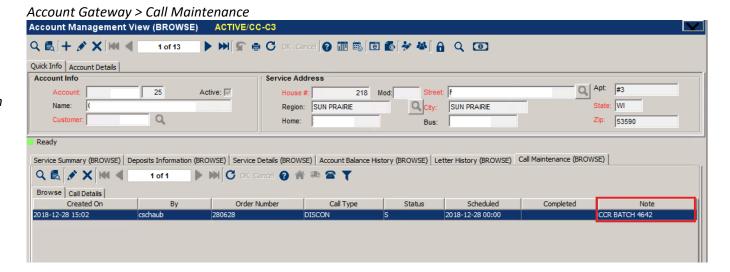
Disconnect Service Orders

The **Service Orders** are now available for further processing as printed or mCare orders.

Note: Each account with a disconnect order receives a flag on the Service Details screen indicating a Disconnect Pending alert.

View Service Orders from the Call Maintenance screen in Account Gateway.

Note: The Credit Control batch number displays on the Notes section of the service order.

Account Gateway > Call Maintenance

Assign / Post the Batch

Click the **Post** tab.

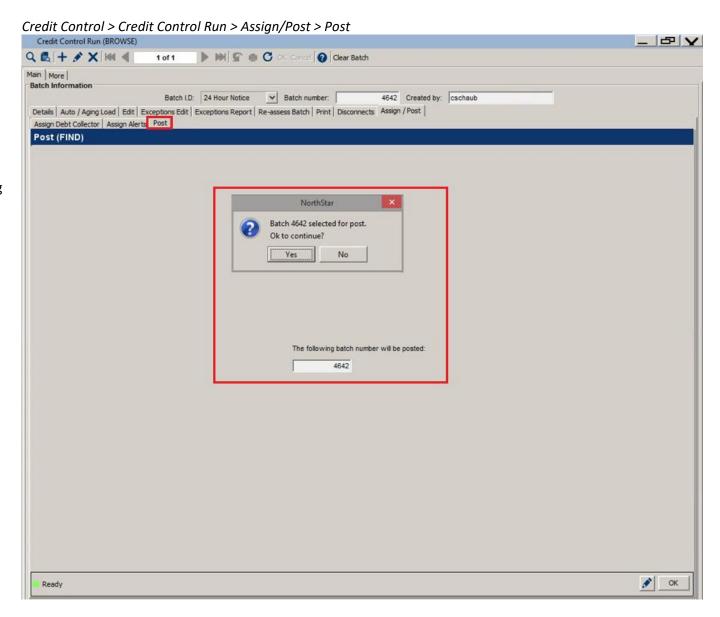*Credit Control > Credit Control Run > Assign/Post > Post*

Click the **Edit** button at the bottom of the screen. This will populate the batch number.

Click **OK** to initiate the posting process.

Confirm the batch is ready for posting by clicking **Yes.**

Click **Close** when the successful completion message appears on the processing screen.
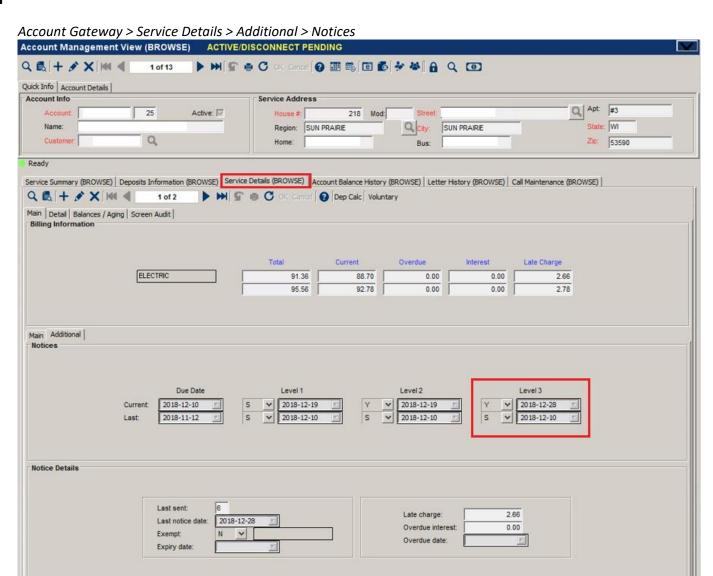
The batch has posted.

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Account Gateway Verification

Return to Account Gateway.

Refresh the screen.

Review a few accounts.

Verify flags for Level 3 flipped when the batch posted.

Account Gateway > Service Details > Additional > Notices

Note: A disconnect pending alert will show at the top of the account, but the service order in call maintenance will show as scheduled.

Once the order is complete, the flag will change to completed and the alert will show as disconnected at the top of the account.

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