

Step-by-Step Procedure

Disconnect Process

The Disconnect Process begins in Credit Control with the creation of the Disconnect Service Orders. The service orders created in Credit Control will have a status of 'S' for non-remote disconnect capable meters and a status of 'R' for remote disconnect capable meters.

Credit Control Process

The following Credit Control Process is not a comprehensive review of the utility's Credit Control Process. To review Credit Control, refer to documentation provided with NorthStar Credit Control Training. The utility shall follow their standard Credit Control process for identifying accounts eligible for disconnection the following documentation is intended to highlight a process change for the end user when running Credit Control so that disconnect orders for both remote capable and non-remote capable meters will be generated.

After the service orders have been created, follow the procedure outlined below for the *Remote Disconnct Process*.

Create a Credit Control Run Batch

Select the **Batch ID** from the dropdown list using the description that fits the desired type of batch, in this case **Disconnects**, or create a new Batch ID Type.

The Batch ID description will assist in determining what is in the batch if more than one batch exists at a time.

Each Batch ID from the list designates a minimum overdue account balance, the Levels to be processed, and account type (active and/or final) for processing.

Batch levels are determined during the creation of a new Batch ID.

For instructions on creating a new Batch ID Type, refer to the Credit Control Documentation.

Credit Control > Credit Control Run > Credit Control Run

The screenshot shows the 'Credit Control Run (EDIT)' window with a 'Batch Information' section. The 'Batch ID' is set to 'DISCONNECTS' and the 'Batch number' is 1453. A table lists various Batch IDs with their corresponding levels and minimum balances. A 'Credit Control Default Batch Types Setup (BROWSE)' dialog box is open, showing the 'Batch ID' as 'DISCONNECTS' and a 'Minimum balance' of 17.00. The 'Levels' section shows Level 1: Y (Yes), Level 2: Y (Yes), and Level 3: N (NO). The 'Active / Final' section shows 'Active' checked and 'Final' unchecked.

Batch ID	L...	L...	L...	Min Balance
DISCONNECTS	Y	Y	N	Y	N	17.00
24 HOUR LIST	N	N	Y	Y	N	17.00
FINAL BILL LET...	A	A	A	N	Y	0.01
WINTER REMIN...	Y	Y	N	Y	N	17.00
WINTER WATE...	Y	Y	N	Y	N	17.00

The Batch number will auto-populate following the selection of the Batch ID from the list.

After selecting the Batch ID, the Process Information details will auto-populate in the table.

Enter the Process Date

This is the date the user knows that the Level should be loaded and the date notices will be done.

Check the 'Active' box to load Active accounts.

Click **OK** or press **Enter** to save the Header and Process Information.

Credit Control Run (EDIT)

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OK Cancel Clear Batch

Main More

Batch Information

Batch ID: DISCONNECTS Batch number: 1453 Created by: cschaub

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

Process Information

Process date: 2019-04-14 Minimum balance: 17.00

Notices

Level 1:	Y	Yes
Level 2:	Y	Yes
Level 3:	N	NO

Active: Finals:

If the utility chooses to limit the load to only those accounts that have a significant outstanding balance, the 'Minimum Balance' field should be set to the smallest amount for consideration in the load process. This field is a means of eliminating the need to delete accounts after the batch has loaded. Using the minimum amount will flag all accounts that are below the minimum balance as skipped. Future loads will include this overdue amount along with any additional outstanding balances.

Click on the **Auto/Aging Load** tab. This will further define the selection criteria used during the actual loading of the batch.

Two (2) additional tabs are available: Auto Load and Aging Load.

Note: In the following example, the utility uses the Auto Load to identify accounts eligible for disconnection. Follow your utility's standard process for identifying accounts eligible for disconnection.

Credit Control Run (BROWSE)

1 of 1

OK Cancel Clear Batch

Main More

Batch Information

Batch I.D.: DISCONNECTS Batch number: 1453 Created by: cschaub

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

Auto Load Aging Load

Credit Control Load (FIND)

Filter Parameters

Cycle: []
Route: []
Account: []
Class code: []
Tenant / Owner: []

Credit rating: []
Service: []
Category: []
Bill code: []

Program Parameters

Force current bill:
Promised to pay accts:
Include Payment Arrangement: N []
Include Deposit to Collect:
Load Remote:

Alert Code: []
Alert End Period BETWEEN: [] AND: []
Schedule Date: [] Time: []

Please enter the cycle number(s)

More OK Cancel

Select the **Auto Load tab**.

Click on the **Edit icon** (lower right-hand corner).

If it is necessary to limit the range of accounts that are to be loaded set the **Filter Parameters** as desired.

At **Load Remote**, there are three (3) settings available:

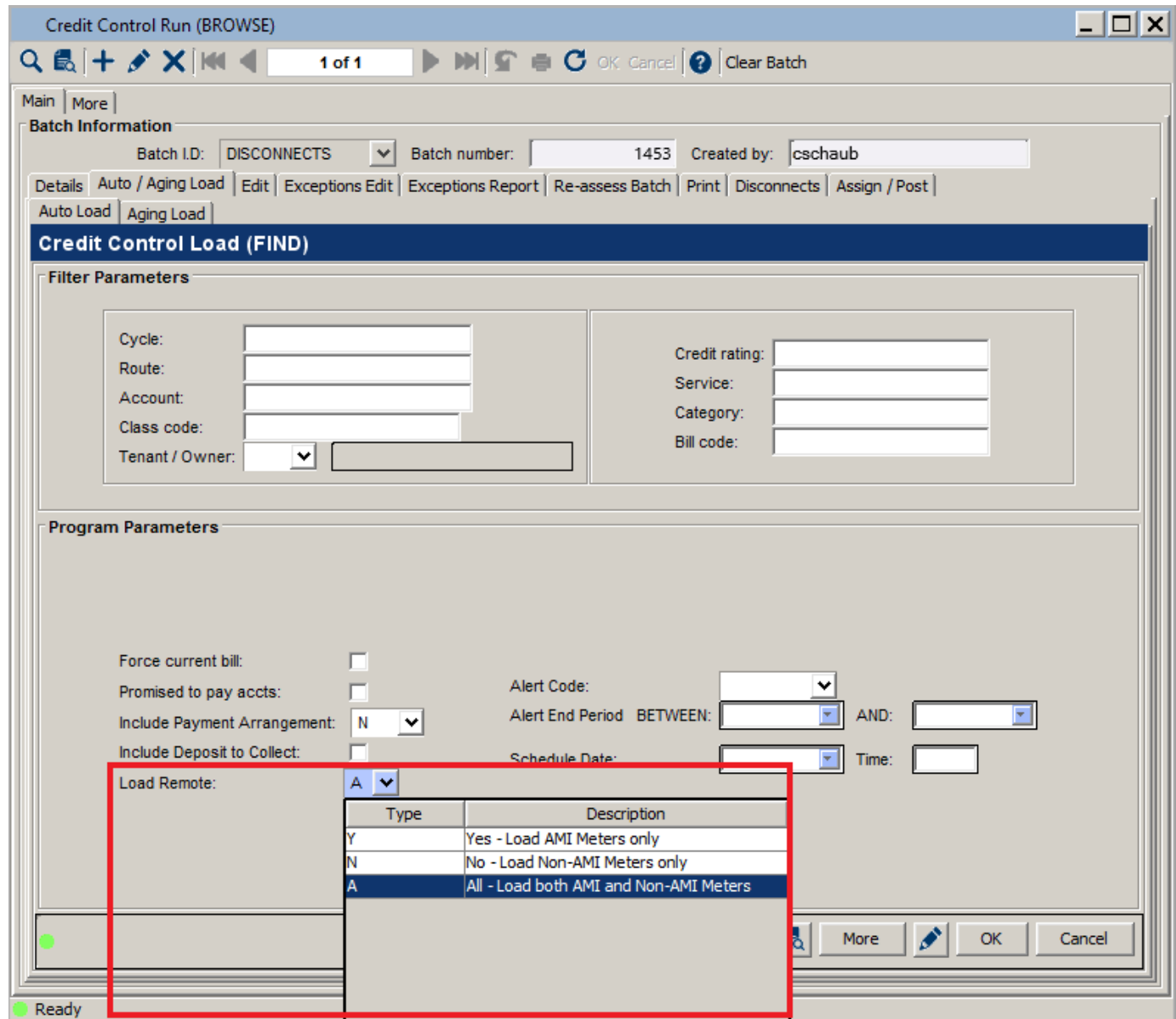
- Y -Yes – Load AMI Meters only**
- N -No – Load Non-AMI Meters only**
- A -All – Load both AMI and Non-AMI Meters**

Set the **Load Remote** field in the **Program Parameters** section to **“A” – All – Load both AMI and Non-AMI Meters**.

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

Once the loading process completes, all remote actionable and non-remote actionable meter types will be loaded into the Batch.

Verify the number of accounts that loaded on the **Edit tab**.



Note: If opting to use the 'Y' (Yes -Load AMI Meters only) and 'N' (No -Load Non-AMI Meters only) settings, perform the Load Remote process for each setting. Complete this process using the same batch.

The utility will continue working through the Credit Control Run following their standard practice up through the generation of Disconnect Service Orders and Posting the Batch.

When the Disconnect Service Orders are created in Credit Control, they will have a status of 'S' for non-remote disconnect capable meters and a status of 'R' for remote disconnect capable meters.