

Universal Business Core Curriculum

Lesson 4.4

How to Issue an Itemized Call Adjustment

Student Guide

Overview

Introduction

In the last lesson you learned:

- What is an adjustment
- Why you would issue an adjustment
- When you would issue an adjustment
- The adjustment process

In this lesson you will learn **how** to issue an Itemized Call adjustment.

Importance

Correctly issued billing adjustments will:

- Make your job easier, since 50% of your calls are billing related.
 - Ensure customer satisfaction because customer requests are handled right the first time, a critical aspect of your job.
 - Protect the company's revenue because it meets company policies, rules and regulations.
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Lesson Overview

In this lesson you will learn:

- To categorize and classify an Itemized Call (IC)
 - The procedure to issue an adjustment
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Lesson Objective

Given a customer billing scenario and using all reference materials you will issue an Itemized Call adjustment with no errors.

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Overview, Continued

Order of Topics This lesson includes the following topics.

Topic	See Page
Adjustment Categories	3
Adjustment Types	4
Adjustment Classification	6
Itemized Call Adjustment Procedure	8
Viewing the Adjustment	11

Adjustment Categories

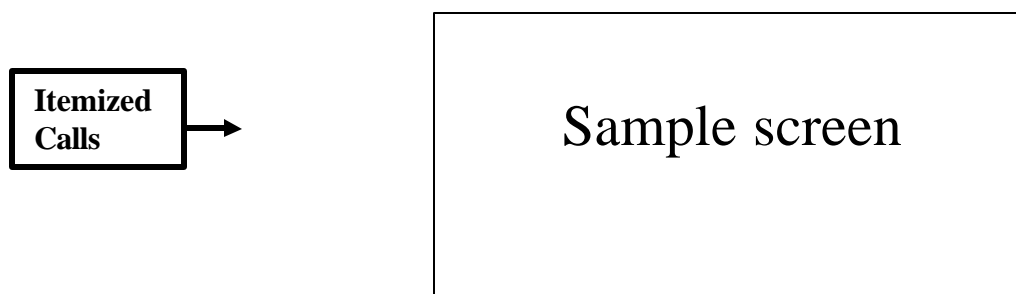
Introduction To issue an adjustment you need to know which category the item you are adjusting falls under.

Adjustment Categories Adjustments are grouped based on where they appear on the bill and the type of charges. They are categorized as:

- Itemized Calls (IC)—Charges related to telephone calls itemized on the bill. These charges appear on the Detail screen.
- Additions and Changes (A and C)—Charges related to products, services, and equipment that appear in the Additions and Changes section of the bill.

This lesson will focus only on Itemized Calls. Lesson 4.5 will cover Additions and Changes.

Detail Screen Example The following graphic shows an example of the Detail (DETL) Screen.



Adjustment Types

Introduction Under the Itemized Call category there are different types of adjustments. These types are based on the reason for the customer's claim.

Adjustment Types The following are the most common IC category adjustment types. See, your online reference material for a complete list of IC category adjustment types.

IC Category		
Adjustment Type	Adjustment Reason	Description
CNC	Call not complete	Customer received a busy, a ring and no answer, or no ring.
CTO	Cut off	Customer was disconnected from the called party.
DAK	Denies all knowledge	Customer asserts they never made the call, e.g., they don't know anyone at the called number.
PTR	Poor transmission	Customer experienced a "bad connection" on the call, e.g., static, cutting in and out, couldn't hear, cross talk.
RTP	Refuses to pay	The call was investigated and sustained, but the customer refuses to pay for it.
WNO	Wrong number	Customer reached a wrong number.

Importance This information is very important to the adjustment procedure. You will use the adjustment type in the CMD field to start the actual adjustment.

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Adjustment Types, Continued

Practice

Below are a number of customer scenarios. Determine which adjustment type applies to each scenario. Write the adjustment type in the space provided.

Adjustment Type	Scenario
1. _____	A customer states that no one in the office recognizes the four calls on page 21 of the August bill. There are four directly dialed calls to the same number.
2. _____	There are two calls on the September bill that are incorrect. No one was in the office after 6 p.m. on August 8 th . You checked the listing and the customer doesn't recognize the number.
3. _____	Mr. Smith wants a credit for a misdial.
4. _____	There are Third Party Billed calls on Tom Thumb's bill that he doesn't recognize. You gave him the listings and he still denies the calls and wants them removed from his bill.
5. _____	When talking to one of his students on the telephone Lee had trouble hearing. He had to call his student back for a better connection.

Adjustment Classification

Introduction In addition to the adjustment type you also need to determine the adjustment classification in order to process your adjustment.

Adjustment Classification Adjustments can be classified as either

- Correct Charges, or
- Uncollectible

Correct Charges Monies we have billed but did not earn. We are not entitled to receive the revenue.

Correct Charges Examples

- The customer reaches a wrong number and the call is two minutes or less.
- A call is not completed but appears on the bill.

Uncollectible Monies we are entitled to receive however collection is either impossible or impractical.

Uncollectible Examples

- Customer denies all knowledge of a collect call.
- A customer reaches a wrong number and it was a three-minute call.

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Adjustment Classification, Continued

Practice

Classify the following scenarios as either correct charges or uncollectible. Label each scenario as either

- C for correct charges, or
- U for uncollectible

Adjustment Classification	Scenario
1. _____	A one-minute wrong number.
2. _____	A two-minute call where the customer was cut off.
3. _____	A customer doesn't recognize the telephone number of a five-minute directly dialed call.
4. _____	A customer denies accepting a person to person collect call.
5. _____	A customer heard mostly static when trying to speak. They had to redial for a better connection.

Itemized Call Adjustment Procedure

Introduction Now that you know how to identify the adjustment type and classification you are ready to issue an adjustment in the Billing System.

An Itemized Call (IC) adjustment is just like it sounds, i.e., you will be removing the charges associated with a telephone call(s) from the bill.

Steps of an IC Adjustment Follow the steps below to issue an IC adjustment. You must start on the Detail screen of the customer's bill where the call(s) to be adjusted appear.

Step	Action	Example								
1.	Assign the appropriate type code based on the reason for the adjustment.	CNC, CTO, DAK, etc.								
2.	Use the table below to determine the CMD entry format. <table border="1" data-bbox="284 945 836 1381"> <thead> <tr> <th>IF adjusting</th> <th>THEN enter the type code (space) and the</th> </tr> </thead> <tbody> <tr> <td>a single call</td> <td>item number. Example: DAK 14</td> </tr> <tr> <td>sequential calls on the same screen</td> <td>item numbers separated by a dash. Example: DAK 14-19</td> </tr> <tr> <td>non sequential calls on the same screen.</td> <td>item numbers separated by a comma. Example: DAK 14, 17, 19</td> </tr> </tbody> </table> <p>Note: If adjusting calls on multiple pages use [F11] to page forward then use the above table for formatting.</p>	IF adjusting	THEN enter the type code (space) and the	a single call	item number. Example: DAK 14	sequential calls on the same screen	item numbers separated by a dash. Example: DAK 14-19	non sequential calls on the same screen.	item numbers separated by a comma. Example: DAK 14, 17, 19	<div style="border: 1px solid black; padding: 20px; text-align: center;"> <p>Sample screen</p> </div>
IF adjusting	THEN enter the type code (space) and the									
a single call	item number. Example: DAK 14									
sequential calls on the same screen	item numbers separated by a dash. Example: DAK 14-19									
non sequential calls on the same screen.	item numbers separated by a comma. Example: DAK 14, 17, 19									
3.	Press [F9] the ASUM key. <u>Result:</u> Page 2 of the ASUM screen will appear.	<div style="border: 1px solid black; padding: 20px; text-align: center;"> <p>Sample screen</p> </div>								

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Itemized Call Adjustment Procedure, Continued

Step	Action	Example						
4.	Tab to the U/C field and type either <ul style="list-style-type: none"> • U for Uncollectible, or • C for Correct Charges 	<div style="border: 1px solid black; padding: 20px; width: 80%; margin: auto;">Sample screen</div>						
5.	Use this table to complete the AMT field. <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th data-bbox="297 667 513 720">IF adjusting</th> <th data-bbox="513 667 833 720">THEN</th> </tr> </thead> <tbody> <tr> <td data-bbox="297 720 513 846">the full amount of the call</td> <td data-bbox="513 720 833 846">do nothing.</td> </tr> <tr> <td data-bbox="297 846 513 1052">a portion of the call</td> <td data-bbox="513 846 833 1052">tab to the prepopulated AMT field. Overkey the field with the desired amount to adjust.</td> </tr> </tbody> </table>	IF adjusting	THEN	the full amount of the call	do nothing.	a portion of the call	tab to the prepopulated AMT field. Overkey the field with the desired amount to adjust.	<div style="border: 1px solid black; padding: 20px; width: 80%; margin: auto;">Sample screen</div>
IF adjusting	THEN							
the full amount of the call	do nothing.							
a portion of the call	tab to the prepopulated AMT field. Overkey the field with the desired amount to adjust.							
6.	Press [F10] the Compute key. <u>Result:</u> Page 1 of the ASUM screen will appear. <u>Note:</u> the amount of the adjustment with and without tax is returned. Use this screen to quote the total adjustment (i.e., including taxes) and the balance due to your customer.	<div style="border: 1px solid black; padding: 20px; width: 80%; margin: auto;">Sample screen</div>						
7.	Type SEND (space) RP in the CMD field. <u>Note:</u> RP is the name or abbreviation of the <u>r</u> esponsible <u>p</u> arty you are speaking with.	<div style="border: 1px solid black; padding: 20px; width: 80%; margin: auto;">Sample screen</div>						
8.	Press the [Enter] key. Your adjustment has now been sent to CRIS accounting!							

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Itemized Call Adjustment Procedure, Continued

Demonstration Your instructor will walk you through the steps to issue an IC adjustment.

Practice You will now have an opportunity to practice issuing IC adjustments by participating in three role plays.

- Your instructor will act as a customer.
 - Students will take turns as the Service Representative.
 - All students must participate by accessing the account and making required entries in the Billing System.
 - You may use your Student Guide as a reference.
 - When acting as Service Rep
 - Provide all mandated disclosures.
 - Use sales skills to establish customers' needs and make recommendations if appropriate.
 - If you have a question, excuse yourself from the “customer” before asking your Instructor the question.
 - Do not issue orders resulting from sales.
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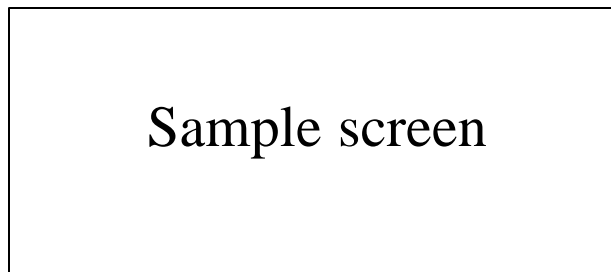
Viewing the Adjustment

Introduction You can view adjustment results on the following Billing System screens.

- NOTE screen
- DETL screen
- CSBL screen

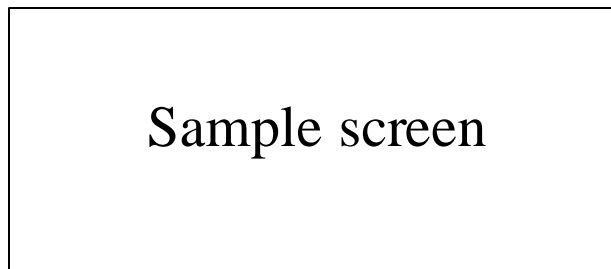
NOTE Screen The NOTE screen will automatically populate the adjustment information. It shows the total adjusted amount and a list of the calls adjusted. The REF NBR (Reference Number) is information used only by Accounting.

Note Screen Example



DETL Screen The Billing System identifies that a specific call has been adjusted by posting an “A” next to the item number.

DETL Screen Example

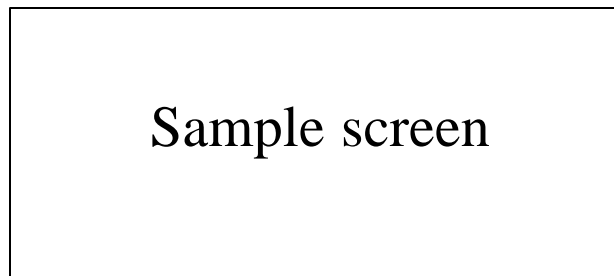


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Viewing the Adjustment, Continued

CSBL Screen The CSBL screen shows the amount of the adjustment under payments and adjustments. Note the transaction code identifies this as an adjustment. In addition, the amount of the adjustment has been deducted and the new current amount due is displayed.

**CSBL Screen
Example**



Lesson Summary

Review

In this lesson you learned how to issue an Itemized Call (IC) adjustment including:

- Identifying the adjustment category and type
 - Classifying an adjustment as correct charges or uncollectible
 - Use the Billing System to
 - Issue the adjustment
 - View the completed adjustment.
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