Split Bill into Separate Billing Statements-1908

Introduction

Customers sometimes request a **separate statement** for a specific reason:

- This is not something we typically offer

    - They may want data service billed separately because their employer is paying for their service at home

    - If this is a roommate situation and separate accounts are requested, see the section Duplicate Account is Needed

- **Statements are split** at the **category/line of business level**

    - Can not split individual services such as HBO, phone lines, etc. into separate bills

- **Set the correct expectation** as to how their bill statement will look:

    - **Original Statement:** bundle description is listed; rate is **reduced** by the service billed on the second statement

    - **Second statement: lists only** the selected LOB at the bundled rate

    - **Both statements** may have prorates depending on the bill cycle

- Autopay can be setup on both statements on a split bill

- **Important:** the IVR does **not provide** self help for accounts with split statements - calls go directly to agent

- Inform customers whose payments are made using 3rd party bill pay services, to

notify their bank they have **two account numbers**

- ○ Provide the customer with their 13 digit account number for each statement

Resolution Steps

1. **Customer Occurrence Configuration** [OC] screen

2. Highlight / click on the **service(s)** and **all** active **occurrences of the service category** you want to split

   - ○ Hold down **Ctrl key** to click for **multiple occurrences** at once

   - ○ All the same statement per category

   - ○ This is so all taxes and fees will properly merge

3. Click the **Recur and Usage B/W** button

   - ○ **Never** select **Recur B/W** or **Usage B/W**

   The **Customer Occurrence Configuration Grid Key** gives an explanation of fields and codes

4. Click **Add Statement**

   - ○ A **new Stmt Code** will populate with the **Stmt Stat of N/Cl**

   - ○ **Highlight** the **new statement**; click the Select button

5. Click the check box to **Confirm;** press **Enter** then **Exit**

6. **Repeat Steps 3 - 5 as needed** until all active occurrences of the **service category** are on the same statement

7. **Verify** that the occurrence is now on the separate billing statement

   - To do this, click the **new statement** that was just created

   - Click the **Services**

   - The services displayed here will be on the new billing statement

   - Press **Exit**