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/CI**
    - **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**

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