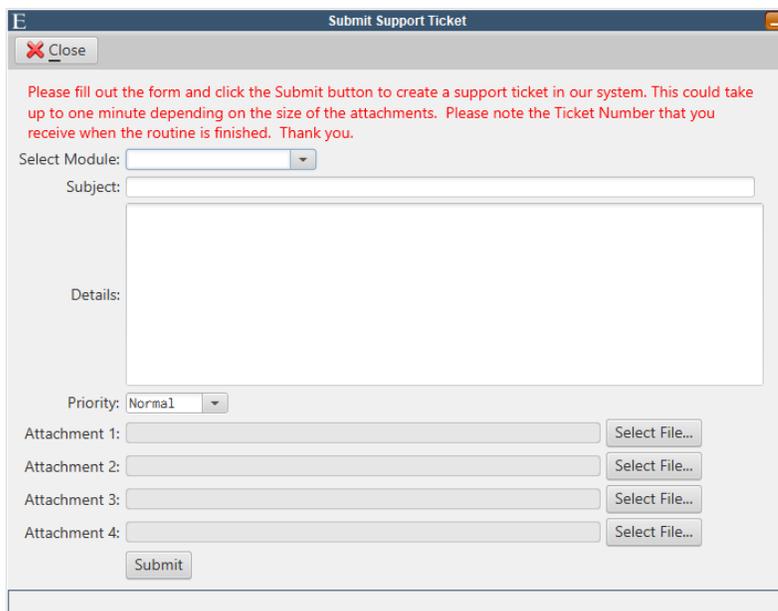# Utility Billing: Best Practices
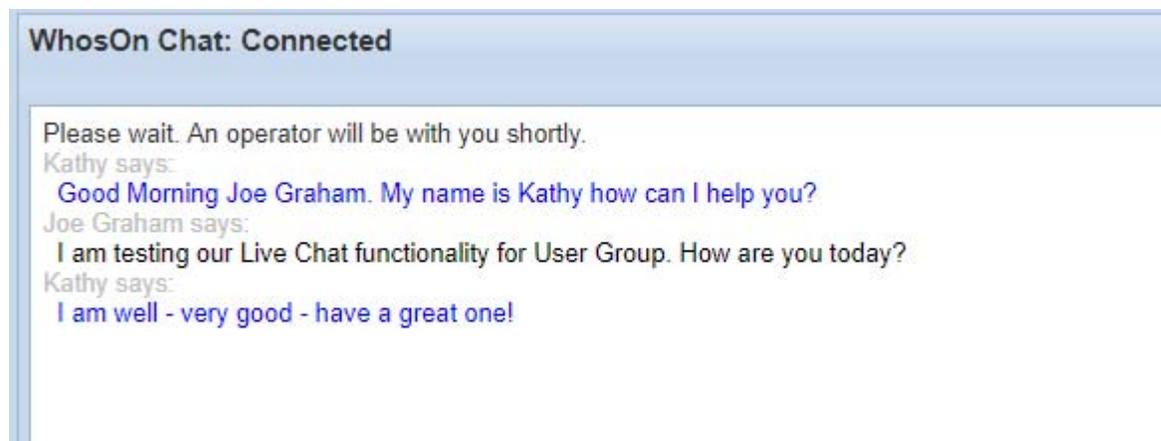
Submitting Support Tickets

1. MCSJ - Go to *Help > Submit Support Ticket*. Select the Module you need assistance with. Enter a Subject line for the case. Include as many details as you can in the allotted space. Specify a priority so we can best identify the urgency of your case. Attach up to 4 documents for our staff to review prior to contacting our office. Click Submit when finished.

2. EA411.com – If the MCSJ software is open, go to *Help > Launch Support Site*. If the MCSJ program is not open, open a browser and go to EA411.com. Once on our website, hover the mouse over Contact, and then click Support. Begin entering your contact information, and check off your current situation. Select the Module your case is in reference to. Enter any case details you would like us to be aware of before we contact you. Click Submit when finished.
3. Support@edmundsassoc.com – Send any support inquiries to our support email, with as many case details and attachments as the situation may require.

4. Live Chat - If the MCSJ software is open, go to *Help > Launch Support Site*. If the MCSJ program is not open, open a browser and go to EA411.com. Once on our website, click the Live Chat button on the right side of the screen towards the scroll bar. Insert your name, and then hit Enter. An operator will then shoot you a message asking how we may assist you today. Begin describing your case, our operator will do their best to assist you. If a phone call or connection to your computer is necessary, one of our representatives will contact you to assist with the issue.

WhosOn Chat: Connected

Please wait. An operator will be with you shortly.
Kathy says:
   Good Morning Joe Graham. My name is Kathy how can I help you?
Joe Graham says:
   I am testing our Live Chat functionality for User Group. How are you today?
Kathy says:
   I am well - very good - have a great one!

Setting Up Your Workspace

1. Saving your Workspace – Our system has the ability to open pre-selected MCSJ screens upon logging in to the system. To set up, open all Maintenances/Routines/Reports you would like to have open when logging into MCSJ. Then go to *File > Save Workspace*. A message will pop up asking if you would like to save the Workspace. Click Yes to Save. Now, when you log into MCSJ, those screens will open immediately. If you would like to Restore your Workspace without logging out and logging back into MCSJ, you can go to *File > Restore Workspace*. This will re-open any screens from your Workspace that may have been closed by the user.

2. Setting Favorites – Our system has the ability to save any MCSJ screen as a favorite. Once saved, you may simply click Favorites, and select the MCSJ screen you would like to open from your list. You may

rename the routine in the list to better match your terminology or identify the routine as a certain number step in a procedure. For example, you may rename the Payment Window as Cash Register, or list the Export Meter Gun Data routine as Meter Reading Step 1. Renaming the routines in your Favorites list does not rename the routine once it is pulled up.
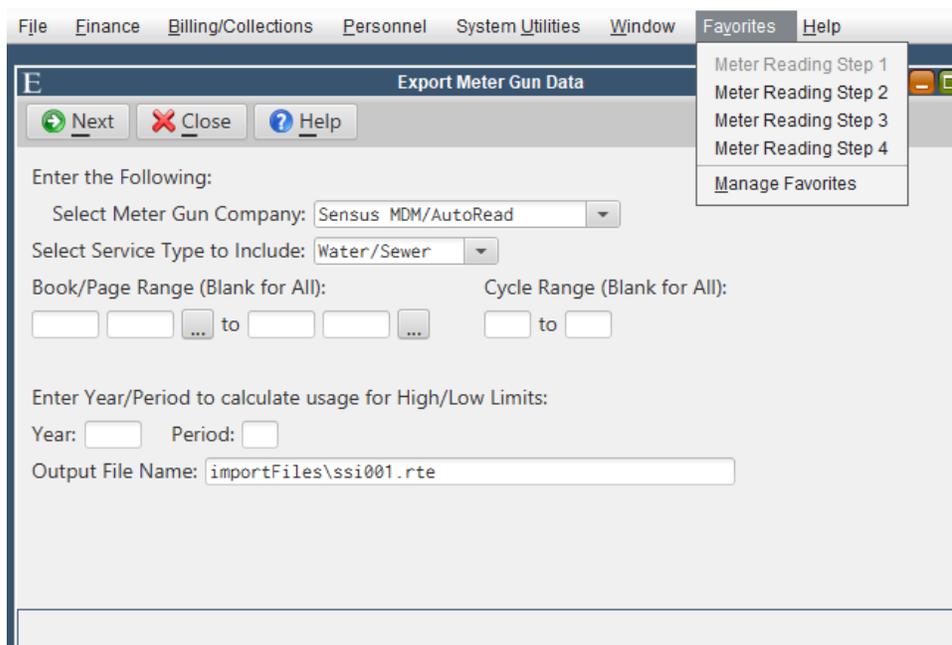

3. Window –By clicking on Window, a list of all open screens in MCSJ will display below. Clicking on any of the screens in the list will bring it to the front of the Workspace so you may resume using it. This is beneficial for when you have multiple screens open at once and are having difficulty finding the one you need. By clicking the Cascade option, all open windows will be moved to the top left corner of the screen, overlapping in a Cascading fashion. Close All will close all open routines on your Workspace. Open All will open all screens that may have been minimized. Minimize all will Minimize all open routines to the bottom of the Workspace.
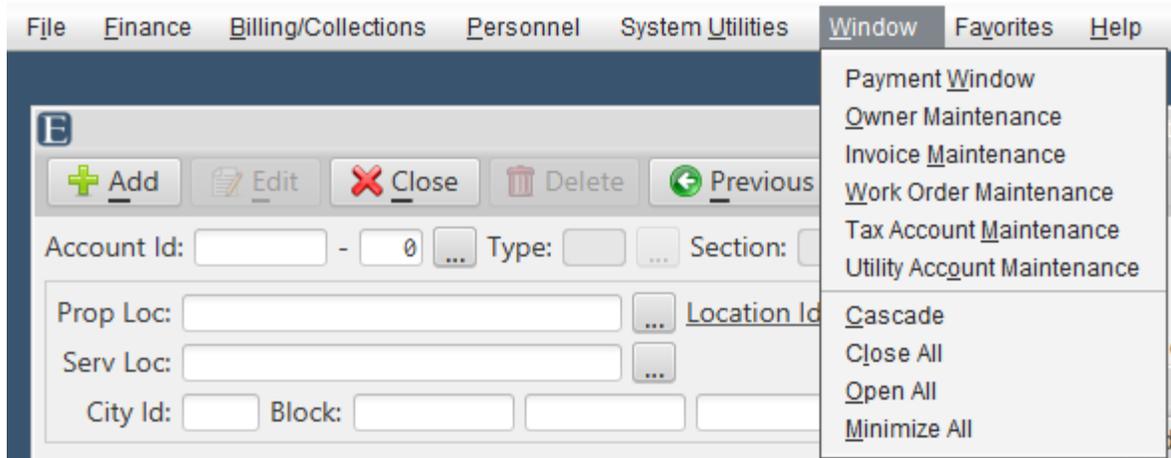
Hyperlinks

1. Our system has the ability to pull up information referenced in other Maintenances from the current screen using Hyperlinks. If you see an identifier underlined on the screen, that is an indication that this is a Hyperlink. Simply click on the Hyperlink and the appropriate Maintenance will be pulled up with the accounts information. For example, if we are looking at Account 42-0, we see that the Location ID is 34. By clicking on the Hyperlink for the Location ID, it pulls up Location Maintenance with the information for Location ID 34 filled in.
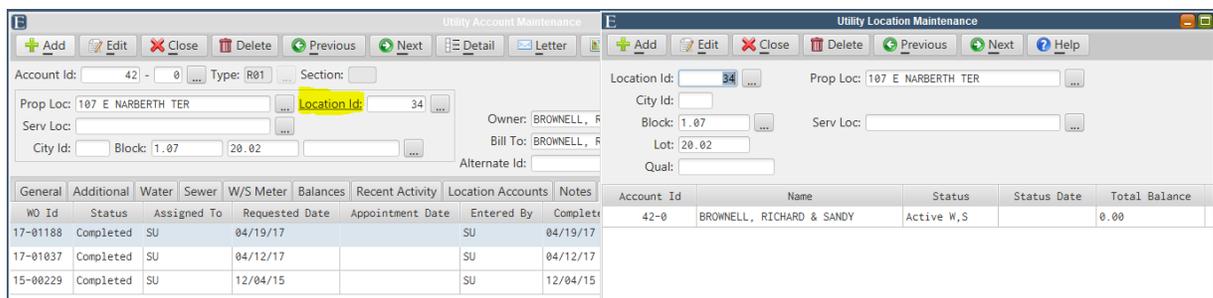
One Click Adjustments

1. Our system has the ability to do single line adjustments to Utility Accounts from the Utility Account Maintenance screen, instead of going through a batch. Pull up the Utility Account to adjust, and go to the Balances tab, click the Balances Service tab to be adjusted.

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a. For a Billing Adjustment, determine which Bill Year/Period needs to be adjusted. Once the amount to be adjusted has been determined, either double click on the Billing Amount to be adjusted, or Right Click on the Billing Amount, and click Adjust this Billing. A Billing Adjustment screen will appear. Enter the Bill Code the adjustment will be done with, and the transaction date for this adjustment. A Description of the Adjustment can be entered if desired. Enter the amount to be adjusted in the Flat and or Excess Amount section. (Flat amount references either the Flat fee or the Minimum charge for a Bill Code, the Excess amount references the amount Billed for usage over the Allowance. Entering the amount to be adjusted in either section will have the same effect on the bill total, but will potentially affect your Billing Register if running with Bill Adjustments included.) Enter Positive amounts to increase the Billing, and Negative Amounts to decrease the Billing.

b. For a Balance Adjustment, determine which Bill Year/Period needs to be adjusted. Once the amount to be adjusted has been determined, either double click on the Balance Amount to be adjusted, or Right Click on the Balance Amount, and click Adjust this Balance. A Balance Adjustment screen will appear. Enter the Balance Adjustment Code the adjustment will be done with, and the transaction date for this adjustment. A Description of the Adjustment can be entered if desired. Enter the amount to be adjusted in Adjust Amount section. Enter Positive amounts to increase the Balance, and Negative Amounts to decrease the Balance.
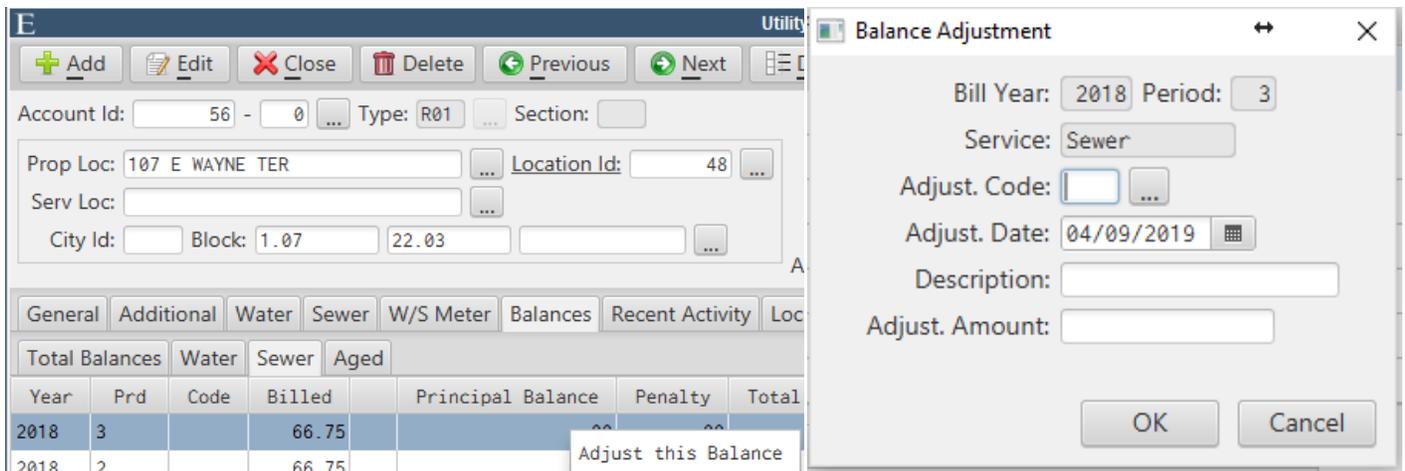
c. For a Penalty Adjustment, determine which Bill Year/Period needs to be adjusted. Once the amount to be adjusted has been determined, either double click on the Penalty Amount to be adjusted, or Right Click on the Penalty Amount, and click Adjust this Penalty. A Penalty Adjustment screen will appear. Enter the Balance Adjustment Code the adjustment will be done with, and the transaction date for this adjustment. A Description of the Adjustment can be entered if desired. Enter the amount to be adjusted in Adjust Amount section. Enter Positive amounts to increase the Penalty, and Negative Amounts to decrease the Penalty. You can not create a Penalty Credit through this routine.
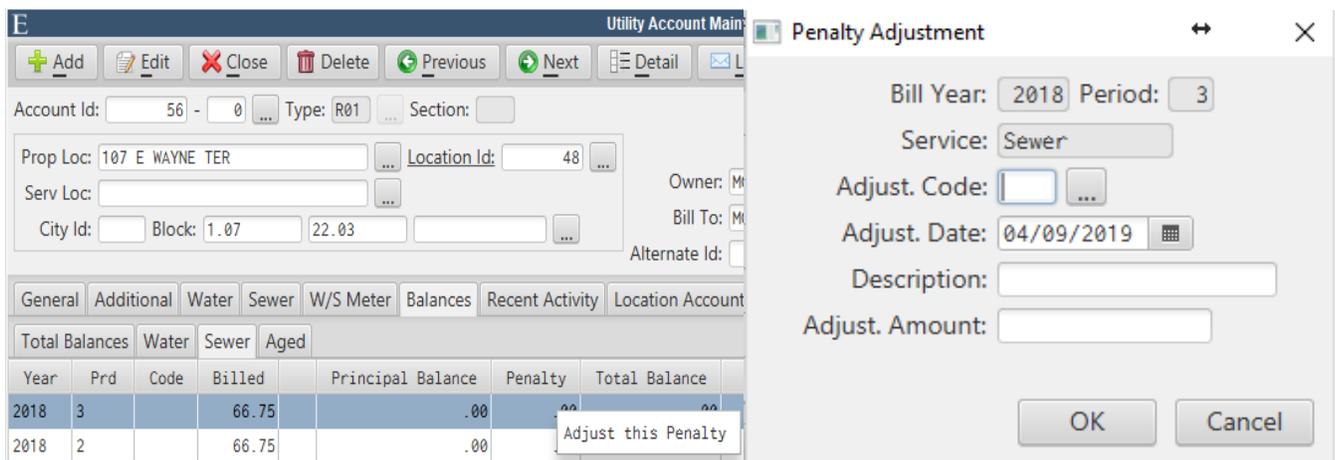
Additional Tab

1. Setting 3rd Party Notifications – Our system allows you to send Delinquent Notices and/or Bills for a Utility Account to a 3rd party. Pull

up a Utility Account and go to the Additional Tab. Towards the bottom right hand side there is a section titled Co-applicant. The Co-Applicant is able to receive either just Delinquent Notices for this account, or Delinquent Notices and Bills. Fill in the information for the 3rd party, this will print on the additional Bills/Delinquent Notices.

2. Setting up Direct Withdrawal – If you wish to use our Direct Withdrawal routine, any Utility Account that wants to sign up will need its Bank Account and Routing Number entered into the Additional Tab. Routing Numbers are first entered into Bank DFI Maintenance under System Utilities, and then selected from the picklist. The Prenote flag should be checked off when the Account is being added to Direct Withdrawal. This will allow you to create a Prenote file to send to the bank and test the Account before running the regular direct withdrawal routine. After the Prenote has been accepted, you may uncheck Prenote. There is a routine in Special Routines to uncheck all Prenote flags at once.
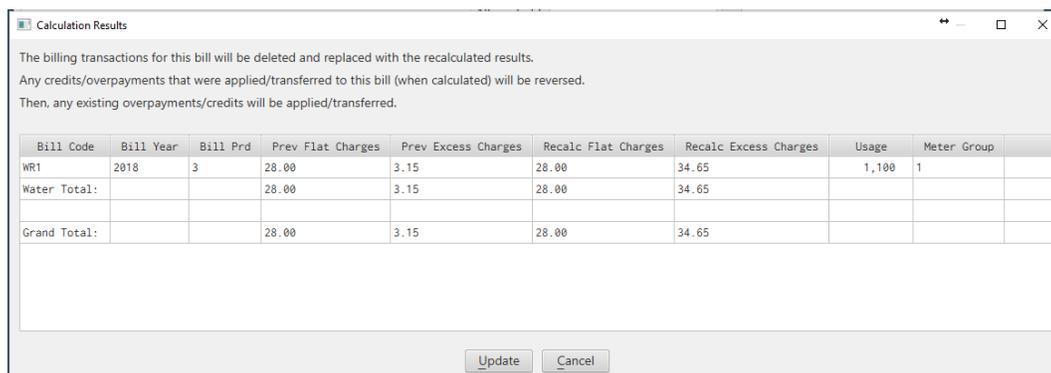

Recalculate a Single Bill

1. Our system gives you the ability to Recalculate a bill for a Single Utility Account (This routine does not allow you to calculate a bill for a single

account, that can only be accomplished through Bill Calculation/Update).

a. First, identify why the account needs to be recalculated. If there was a Meter Reading for the Account entered in error, you may need to first use the Meter Reading Adjustment Routine to edit or delete the incorrect reading. If the wrong Bill Code or Bill Code Units was assigned to the Accounts, then these need to be edited on the Service Tabs of Utility Account Maintenance.

b. Once the Utility Account has been corrected, go to the General Tab of Utility Account Maintenance and click the Recalculate Bill button. Select the Service Type and Bill Year/Period to Recalculate.
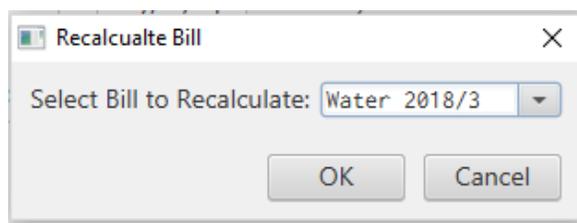
c. Once selected, a screen will display with the Calculation results. The old calculation will display on the left side of the screen, and the new Calculation will display on the right. Verify the totals, if the Calculation is correct, click Update. The Account will now display the Recalculated Bill total.

Utility Reports

1. Utility Account Status Report – *Billing/Collections > Utility Billing > Utility Reports > Account Status.* This report provides account service type balances as of a specified date. It is recommended that this report be run monthly, as it will provide a summary of the different types of activity (payments, adjustments, billings, etc.) during the month. It can be used to ensure the proper Journal Entries and Transactions have been recorded in the Finance system, and can also be used to reconcile monthly Utility activity. The best way to run this report is with no Bill Year/Period Range, the date range set to the 1st day of the month to the last date of the month. Check off all Service Types, and leave the Status set to Both. Determine whether you want to run the Report as type Detail, Condensed, or Totals Only. The Totals page will print at the bottom of each Report Type.

2. Payment Cash Receipts Report – *Billing/Collections > Payments > Payment Cash Receipts Report.* This report allows you to print any receipts and/or reversal history between a give date range. We can adjust the report parameters to only include Utility totals. Set the date range set to the 1st day of the month to the last date of the month. Towards the bottom right, unselect all the Payment Types

besides your Utility Service types. This report can be printed to the printer, the screen, or excel.

3. Utility Unapplied Overpayment List – *Billing/Collections > Utility Billing > Utility Reports > Unapplied Overpayments List*. This report is designed to show all Overpayments associated with Utility Accounts that were unapplied as of a certain date. (Overpayments and Credits are tracked differently in our system. Overpayments are credits not assigned to a Year/Period. They are created when a Payment greater than the balance due is made on a Utility Account. Credits are assigned to a Year/Period and are often created by Billing/Balance/Penalty Type adjustments to the Utility Account.) Type in the Unapplied As of Date, and check off the Service Types to include. Click Print, this report can be generated to the Printer, the Screen, or to Excel.

4. Credit Balance Report – *Billing/Collections > Utility Billing > Utility Reports > Credit Balance Report*. This report is designed to show all Accounts with an overall credit balance for a selected Bill/Year period as of the Date Range end date. If Include Prior Year/Prds in Balance is checked off, any prior year/period balances will be added to the accumulated account balance. The Year/Period Range may be blanked out to include all year/periods. Leave the Balance Less Than section blank or enter a negative number, only accounts with a credit balance less than this amount will print. Both Credits and Overpayments are taken into consideration when running the report.

5. Meter Exception Report – *Billing/Collections > Utility Billing > Meter Reading > Meter Exception Report.* This report is actually six reports in one. Each of the reports help to identify potential reading and usage issues to be reviewed prior to billing. The report also contains an option to auto-generate work orders for any accounts that meet the report selection criteria.
   a. Tripped Meter – shows accounts that have negative usage and/or accounts that have a previous reading that is higher than the subsequent reading.
   b. No Readings – shows accounts that have no readings in the year/period range selected.
   c. Consecutive Estimates – designed to identify accounts that have estimated reads for a specified number of periods.
   d. Zero Usage – shows accounts where the previous read equals the current read.
   e. Variance – will compare the usage between two selected year/periods. Variance % levels can be entered to only show accounts where usage exceeds or falls between certain percentages.