



Stop Bad Bills From Getting Out

The Complete Bill Review and Audit Checklist

Bad bills not only frustrate customers and create payment delays but could do much worse. They can cause a lot of scrutiny and damage to your brand. So, it's time to go beyond the basics when it comes to bill review.

Many utilities have auditing processes in place through their CIS to catch the most common exceptions, but that's simply not enough. With limited criteria and configurability available, many incorrect bills just go out unnoticed. To catch the next level of errors, you must work with a billing provider who can rapidly assess multiple criteria by leveraging data analytics and automation to quickly identify and stop incorrect bills.

At Doxim, we do just that. As a preferred provider of customer communication solutions for over 180 utilities across North America, we have developed a comprehensive list of over 80 pre-defined industry specific rules for bill verification. Our clients are encouraged to leverage any or all these rules as a part of their bill review process. Below is a sampling of billing audit criteria that we recommend to catch bad bills before they are delivered.

- Unbalanced Detailed Charges**
Programmatically add up detailed charges and compare the final amount against the current charge field(s) on the bill.
- Unbalanced Total Amount Due**
Programmatically add up any balance forward plus the current charges and check if it equals the current total amount due.
- Service Threshold**
Assign dollar or usage amount thresholds per service type and compare each billed amount against these thresholds (i.e. water bills greater than \$200 must be reviewed).
- High Bills**
A catch-all for any erroneous high bill. Automatically places bills over a predetermined dollar amount for review (i.e., all bills over \$100,000 must be reviewed).
- Negative Current Charges**
Bills that have negative current charges will be flagged for review.
- Negative Usage**
Bills that have negative usage amounts will be sent for review.
- Days of Service Threshold**
Automatically compare if the number of days billed is greater than the pre-defined days of service threshold.
- Final Bill with Current Charges**
Review any Final bills that still carry current charges.
- Due Date Threshold**
Bills will automatically be flagged for review if the due date is a predefined number of days away from the bill date.

- Credit Bills**
Ensure large sums of credit are not mistakenly disbursed by setting a dollar threshold for all credit bills (i.e., credit bills over \$1,000 must be reviewed).
- Meter Reading Check**
Calculate the difference between the meter start and end amounts and ensure it matches the usage and/or meter read fields received for that billing period.
- Zero Total Amount Due**
Bills amounting to zero dollars will be flagged for review.

- Usage Comparisons**
Automatically track and compare the current month's usage to that of the same period in the previous month or year - specific to each accounts individual history.
- Low Total Amount Due**
Pre-set low bill thresholds to catch any underbilled consumers.
- Bill Corrections**
Double check bills being sent after going through the correction process, to ensure the correction was applied accurately before being delivered.

CASE IN POINT

SMECO Reduces Billing Exceptions, Increasing Operational Efficiency and Customer Satisfaction

When Southern Maryland Electric Cooperative (SMECO) began working with Doxim, they had a comprehensive wish-list focused on customer experience (CX), which included everything from website copy to bill redesign. But another aspect of CX optimization that paid big dividends for SMECO was the reduction of bad bills.

Prior to working with Doxim, SMECO had "odd" bills sent back to them through special handling. Using Doxim Utilitec CCM's UReview feature, we implemented an extensive list of rules to catch bad bills. Those rules included three different types of unbalanced account summaries, logic to review odd billing scenarios, and bill print intercept codes. In parallel testing alone, we uncovered many bad bills that we either created logic for or SMECO took action to correct on their end.

As a result, the number of approved bills increased from 68% to 81%, and the **number of rejected bills decreased from 29% to 19%. On average, we caught 13 bad bills per day. That's 13 opportunities for reputational damage stopped at the source!**

PROTECT YOUR UTILITY

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