

Syllabus Title:	Utility Billing Fast Track
Facilitator	TBA
Availability	TBA
Prerequisites	None
Contact Hours	Monday through Friday, 8:00am to 5:00pm
Contact Avenues	Phone: 800.686.9313 FAX: 937.836.1036 email: support@civiacmi.com Web: www.civiacmi.com U.S. Mail: 52 Hillside Court, Englewood, OH, 45322
Course Description	Course content is targeted for beginners and experienced users who need a basic knowledge of the concepts and procedures involved with CMI's Utility application. Participants will be shown: an overview of the application's parts and components; data entry practices; setting up streets; adding new master accounts; the functionality of batch processing in cash receipts; account adjustments; billing processes; reporting; and querying of records.
Duration	This course requires a full day commitment.
Course Goals	Upon completion of this class, participants will be familiar with: <ul style="list-style-type: none">✓ Additional software options.✓ Setup and Maintenance of the Street file.✓ Creating New Tenants/Accounts.✓ Standard Billing Cycle Workflow.✓ Different Types of Adjustments.✓ Creating and Correcting Cash Batches.✓ Build Basic User Defined reports.
Course Format	Training is offered on this subject using eight modules of varying length that make up a six-hour training day. Each module is designed to highlight key utility billing concepts and procedures. Using a lecture/presentation format, a facilitator will illustrate principles and step participants through simulated tasks. It provides an overview of the application and the conventions used throughout CMI's Utility Billing system.
Reference Material	Application Reference Manual. Additional Course Hand-Outs will be provided as needed.

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Class Rules of Conduct

- ✓ Turn off cell phones.
- ✓ Food and drink are permitted in the classroom.
- ✓ Participate fully and share your ideas.
- ✓ Clients should respect their fellow students by refraining from holding private conversations during lectures and allowing other students to ask questions.

Course Schedule

Module One: Overview of UtyX Conventions

Designed for all users.

- ✓ Explanation of security access.
- ✓ The menus and toolbar components.
- ✓ Keyboard conventions. Mouse usage and Keystroke Hotkeys.
- ✓ The Favorites Menu. How to build a custom user menu.
- ✓ Effective use of restrictions on report setup screens.
- ✓ Printer conventions.

Module Two: Coding Streets

Designed for users who setup and maintain system codes.

- ✓ Adding a new street.
- ✓ Using the sort field.
- ✓ Adding alternate street names.
- ✓ Renaming a street.

Module Three: Adding New Tenants/Accounts

Designed for all users.

- ✓ Creating a new tenant on an existing account.
- ✓ Creating a new master account.
- ✓ Changing a service address.
- ✓ Discuss filling out sub-screens. Text/Comments/Extra Page.

Module Four: Standard Bill Processing

Designed for all users.

- ✓ Meter reading entry.
- ✓ Consumption Proof.
- ✓ Bill calculation.
- ✓ Bill Proof.
- ✓ Bill Override.
- ✓ Bill Lookup.
- ✓ Building Packets.
- ✓ Printing Bills.
- ✓ Bill Update.

Module Five: Adjustments

Designed for the Utility Billing Supervisor

- ✓ Using Invoice Correction (When/How).
- ✓ Creating Misc Charges/Credits.
- ✓ History Correction.

Module Six: Cash Receipts

Designed for all users.

- ✓ Creating a Cash Batch.
- ✓ Inputting Utility Receipts. Manual/Selective apply.
- ✓ Voiding a Receipt.
- ✓ Entering a Miscellaneous Receipt.
- ✓ Balancing a Batch.
- ✓ Cash Reports.

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Module Seven: Standard Reports

Designed for the Utility Billing Supervisor

- ✓ Review of existing reports in the system.

Module Eight: User Defined (Custom) Reports

Designed for the Utility Billing Supervisor

- ✓ Creating and running simple UR reports.

Additional Resources

Students may continue to develop ideas and practices via our Utility Billing User Forum on the Web! Point your browser to "forum.civicacmi.com", login with your User ID and Password (registration required), and start a thread on any Utility Billing topic, -and feel free to respond with useful information to other postings! *This forum is moderated.*