

Financial Services Procedure

SUBJECT: Temporary Service Procedure

NO: UBO P1.25

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Director of Financial Services

EFFECTIVE: August 10, 2015
REVISED: September 1, 2016

- ❖ Temporary service (Water Only Account) is offered to homeowners who are trying to sell the home or clean the home before renting to a new tenant.
- ❖ Temporary service for residential customers is offered in periods of 30 days - up to 90 days per year.
 - An additional 30 days may be requested but must be approved by immediate supervisor.
- ❖ Temporary service for commercial customers (registered with the State of Texas) is offered in periods of 30 days - up to 180 days per year.
 - An additional 30 days may be requested but must be approved by immediate supervisor
- ❖ Temporary service includes water services only (and gas if needed).
 - No street fee, no waste water, no solid waste is offered.
 - No deposit is charged on temporary service.
- ❖ Verify the customer is the owner or property manager on the Location Master Inquiry screen

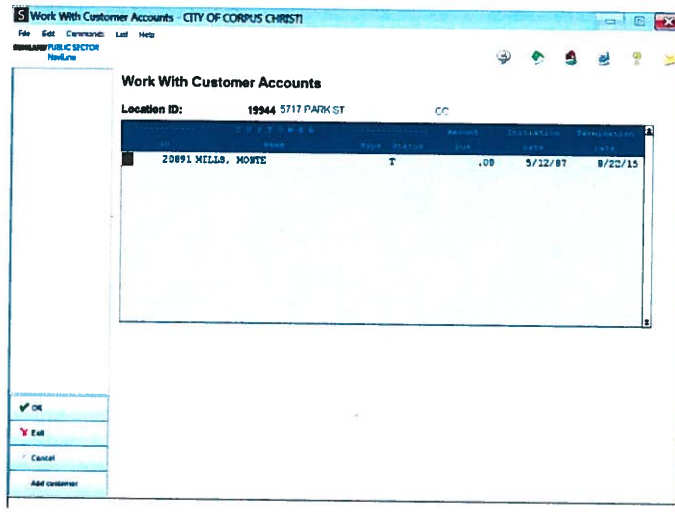
The screenshot shows a software window titled "Location Master Inquiry - (LMNA8010)-----Location 000019942". The interface is divided into several sections:

- Address Information:** Address: 5713 PARK ST, City state zip: CORPUS CHRISTI TX 78412, Ex/entry point: 13, Inside/outside code: 7, Township: CC CORPUS CHRISTI, General location: 23 AREA 3, Set Coordinates: 13 WE ACRES.
- Parcel Information:** Air Account Number: 4002-0005-0100, Subdivision: MOULDSLEE, Parcel status: Active.
- Zoning Information:** Zoning: SINGLE FAMILY 6, Inspection area: TRAILS INSPECTION AREA, Acreage: .2722, Undeveloped interest #: 000, Longitude/latitude: 129.736 299920 171496, PMP R/F coordinates: P, EIR/ARCS code: 1161.
- Current Owner:** Name: SINGLEBERRY, ELIA EYER, Address: 3144 CORLETTERRY, 5713 PARK STREET, CORPUS CHRISTI TX 78412.

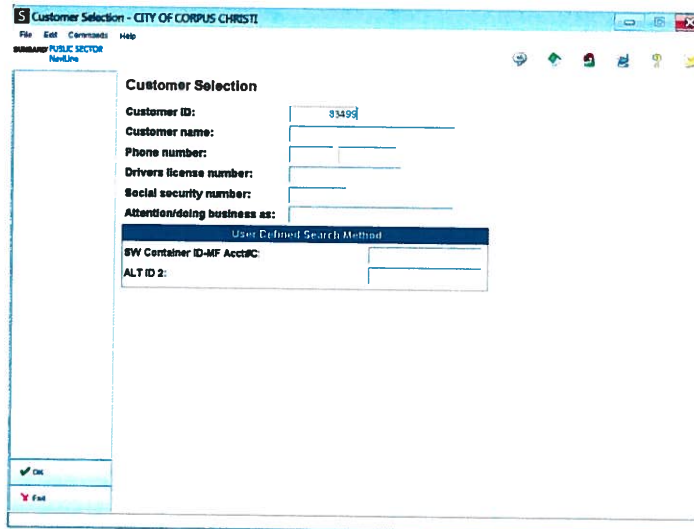
At the bottom of the window, there are buttons for Print, Cancel, Exit, Refresh, and Images, along with a "Close Location" button.

- ❖ If the customer has had service at that location before, you may reactivate that account (unless it has been in collections)

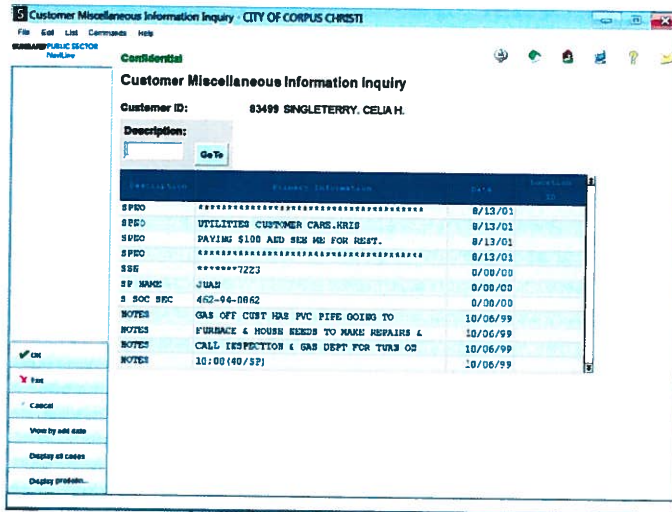
- ❖ If the customer has not had services at this location before, click “ADD CUSTOMER” at the bottom left on the Work With Customer Accounts screen



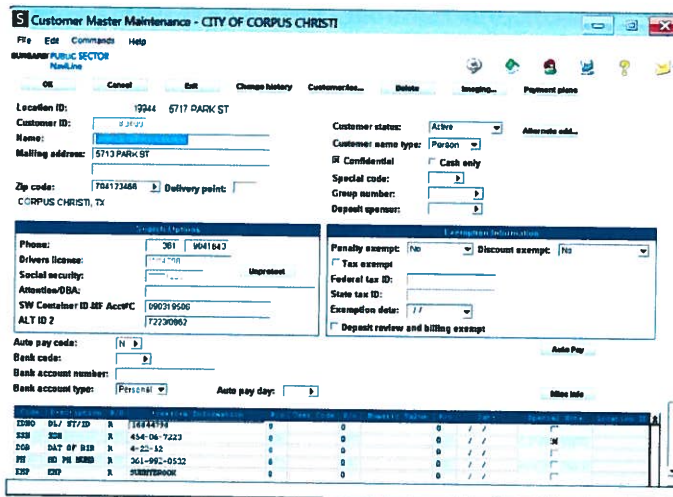
- ❖ Enter the customer's CID in the Customer ID box on the Customer Selection screen and click “OK” at the bottom left



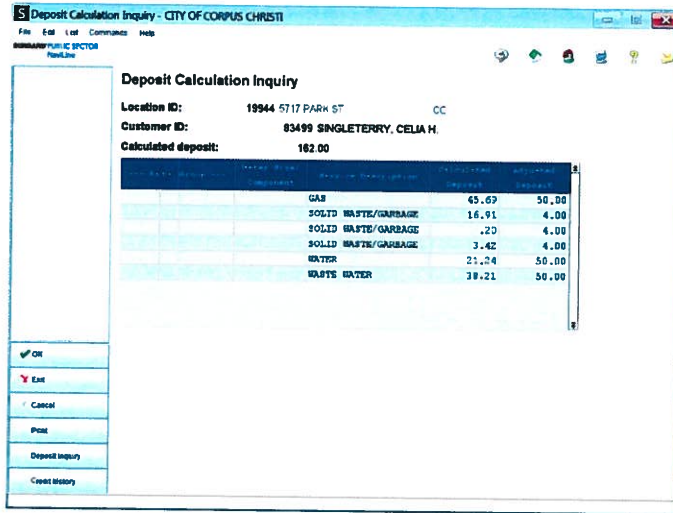
- ❖ Click “OK” at the bottom left on the Customer Miscellaneous Information Inquiry screen



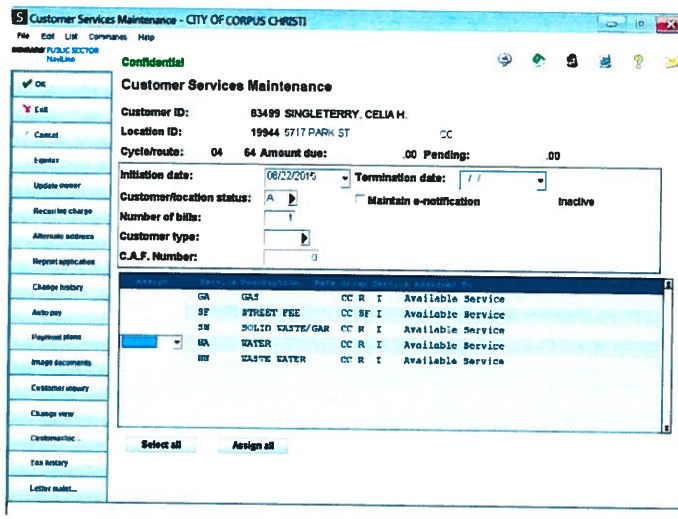
- ❖ Verify all information is correct on the Customer Master Maintenance screen
 - Update mailing address if needed
 - Click "OK" at the top left



- ❖ Click "OK" at the bottom left on the Deposit Calculation Inquiry screen



- ❖ Click the drop down arrow under Assign next to Water on the Customer Services Maintenance screen
 - Click SELECT in the box beside WA
 - Click "OK" at the top left



- ❖ Click "OK" at the bottom left on the Add Customer Service screen for Water

Add Customer Service - CITY OF CORPUS CHRISTI

File Edit Commands Help
PUBLIC SECTOR
NewLine

Confidential

Add Customer Service

Customer ID: 03499 SINGLETERRY, CELIA H.
Location ID: 19944 5717 PARK ST CC

Service: WA WATER

Service Information

Service status: Active Charge type: MT METERED RATE
Start date: 08/24/2015 Related service:
Stop date: Consumption:
Periods to bill: 121456789012
XXXXXXXXXXXXX
X to select, C to assign to Master account.

Rate Group

Jurisdiction: CC CORPUS CHRISTI
Class code: R RESIDENTIAL
Inside/outside:
Number of units: 1.00
Flat rate code:
Unique flat rate:

Enter deposit billing information

OK
Exit
Cancel
Image comments

- ❖ Ensure the Scheduled Start Date is correct and click "OK" at the bottom left on the Work Request Entry screen

Work Request Entry - CITY OF CORPUS CHRISTI

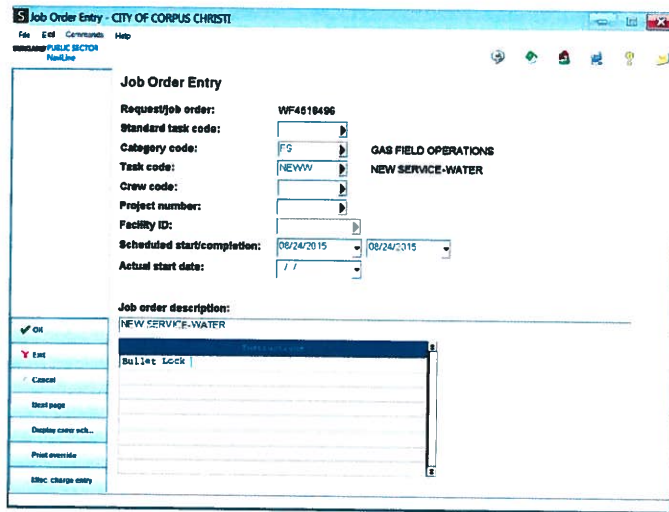
File Edit Commands Help
PUBLIC SECTOR
NewLine

Work Request Entry

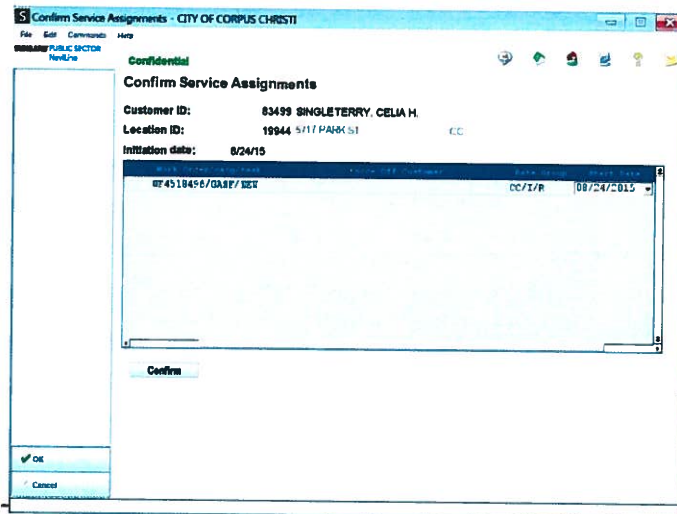
Customer ID: 03499 SINGLETERRY, CELIA H.
Location ID: 19944 5717 PARK ST
Service: WA
Rate group: CC I R
Requester name: SINGLETERRY, CELIA H.
Contact phone number: 361 9051653 Extension: 0
Request origin: CR1
Request category: GASF GAS FIELD OPERATIONS
Work type: RTN ROUTINE
General location: A3 AREA 3
Facility ID:
Request date: 08/22/2015
Scheduled start date: 08/24/2015
 Hold request for deposit
Short description:
NEW SERVICE-WATER

OK
Exit
Cancel
Image comment
Help

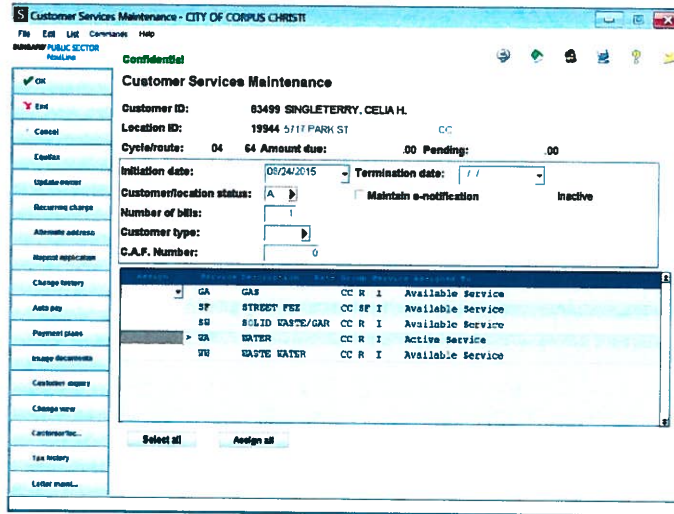
- ❖ On the Job Order Entry screen, change the Category Code to FS and the Task Code to NEWW since this is a water only account
 - Ensure the Scheduled Start/Completion Dates match and are correct
 - Under Instructions – enter the type of lock on the meter, if any
 - Inertite Locks and Box Locks do not get sent to the water department, instead email code enforcement (Angela/Esmer)
 - Click “OK” at the bottom left twice



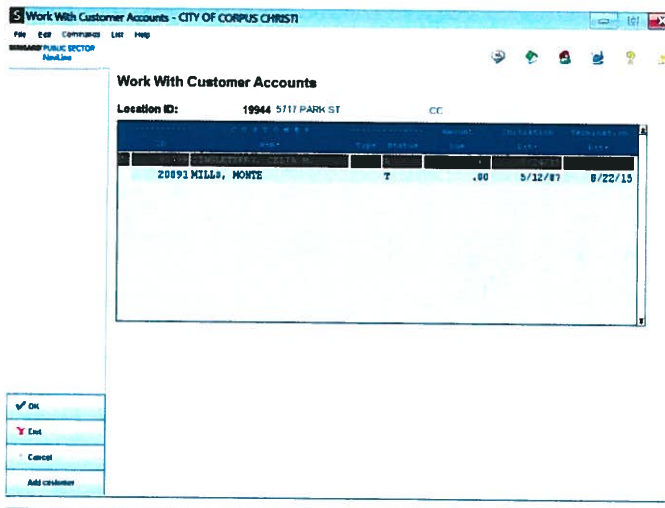
- ❖ Click “CONFIRM” on the Confirm Service Assignments screen



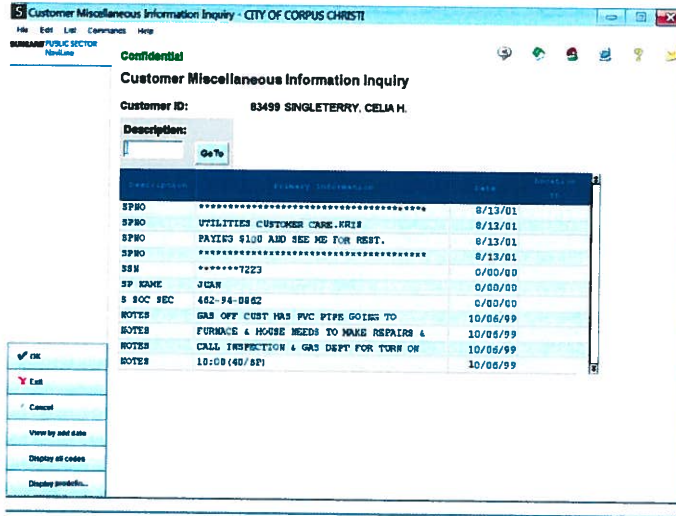
- ❖ Verify the active service on the Customer Services Maintenance screen



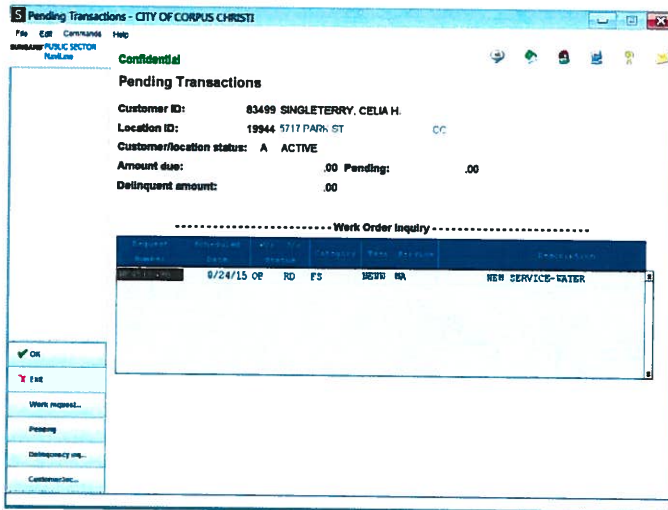
- ❖ Click "OK" on the Customer Services Maintenance screen to get back to the Work With Customer Account screen
- ❖ Temporary Service accounts must have a predetermined termination date at time of set up
- ❖ Right click on the customer's name again and select terminate



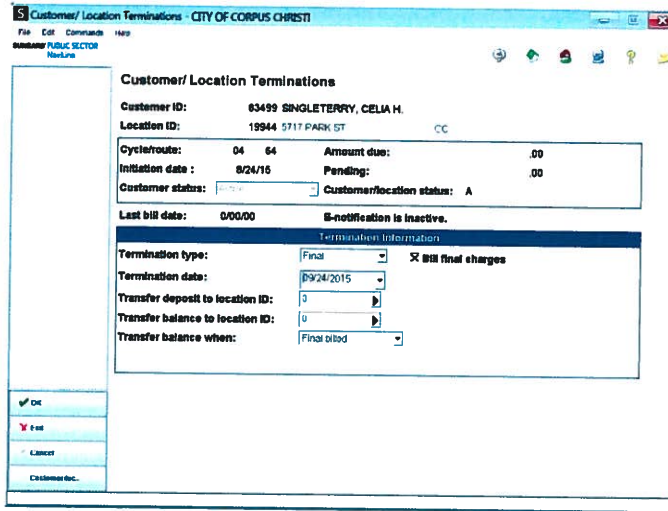
- ❖ Click "OK" at the bottom left on the Customer Miscellaneous Information Inquiry screen



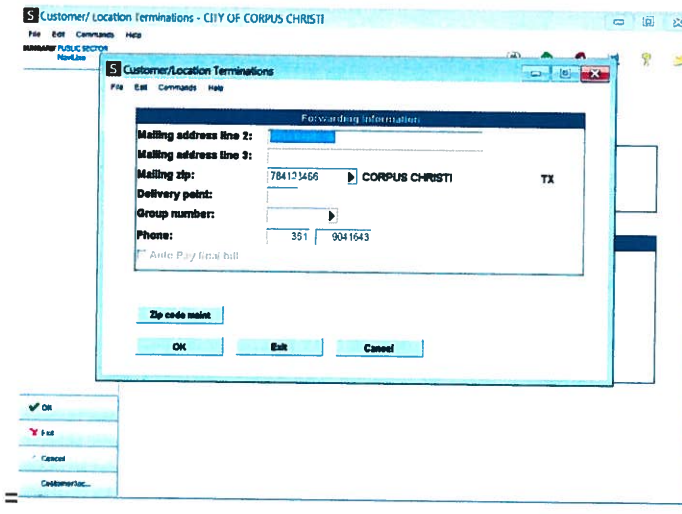
- ❖ Click "OK" at the bottom left of the Pending Transactions screen



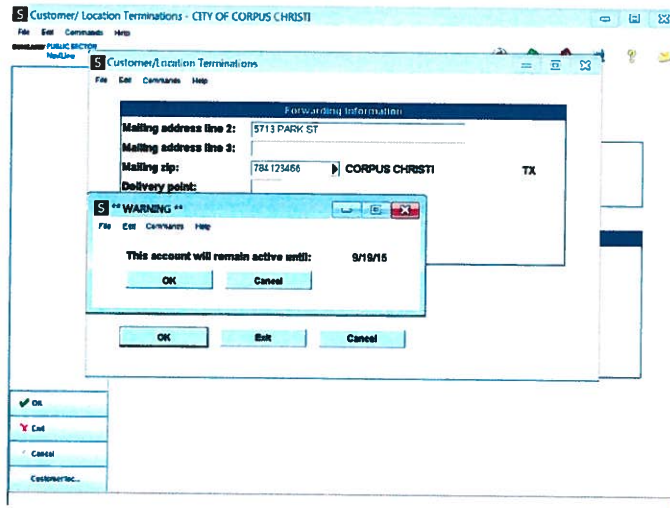
- ❖ Type Final in the Termination Type box on the Customer/Location Terminations screen
 - Change the Termination Date to either 30 days or 60 days from start date
 - Click "OK" at the bottom left



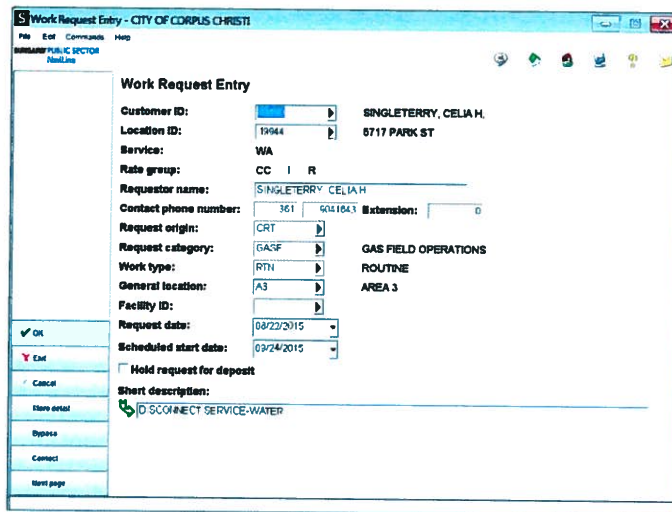
- ❖ Verify the mailing address for the final bill – Click "OK"



- ❖ A warning will pop up stating how long the account will remain active
 - This will be a few days before the date you entered
 - Click "OK" on the pop up



- ❖ Verify the termination date and click "OK" at the bottom left on the Work Request Entry screen



- ❖ Click "OK" at the bottom left of the Job Order Entry screen

Job Order Entry - CITY OF CORPUS CHRISTI

Request/job order: WF4518497

Standard task code: []

Category code: GASF GAS FIELD OPERATIONS

Task code: DISC DISCONNECT SERVICE-WATER

Crew code: []

Project number: []

Facility ID: []

Scheduled start/completion: 09/24/2015 09/24/2015

Actual start date: / /

Print (immediately): No

Job order description: DISCONNECT SERVICE-WATER

Buttons: OK, Exit, Cancel, Word wrap, Display crew sch..., Print overview, Misc. charge entry

- ❖ The account will still show as Active in the Work With Customer Accounts screen, but there will be a termination date for the future

Work With Customer Accounts - CITY OF CORPUS CHRISTI

Location ID: 19944 5717 PARK ST CC

Account ID	Name	Account Type	Amount	Start Date	Termination Date
83499	SINGLETERY, CELIA H.	A	.00	8/24/15	9/24/15
28891	HILLS, HOWE	T	.00	5/12/07	0/22/15

Buttons: OK, Exit, Cancel, Add customer

- ❖ Once per month a query is run by the Functional Analyst to ensure there are no water only accounts without termination dates preset