

“Tips” for submitting Bill Code and Name Changes

<p>Why is it important to update billing codes and names?</p>	<p><u>Names</u>: Telephone numbers should match the correct names to enable easier checking and reconciliation of your billing data. Also, voicemail boxes and EVM are based upon names. EVM, or enabled voicemail, provides an email notification of your voicemail message. When replying to a voicemail message or opening an EVM email, if the name is wrong, you will hear/see the incorrect name which can be confusing.</p> <p><u>Codes</u>: Government grants and fiscal year budgets all track by billing codes. If the incorrect code is used, it can be very problematic with expense tracking, forecasting, and auditing.</p>
<p>Who can submit a request to change a billing code or name?</p>	<p><u>Authorized</u> contacts are required to submit changes. However, anyone can send an email to telecom_billing@harvard.edu asking for the name of their BD or BL contact who can submit the request on their behalf, or to clarify a contact role.</p> <p><u>Primary contact roles</u>:</p> <ol style="list-style-type: none"> 1. <u>Bill Distribution (BD) contacts</u>: responsible for reviewing electronic statements; can run reports and submit name changes <u>only</u> 2. <u>Billing (BL) contacts</u>: responsible for validating telecom billing codes; can run reports and submit name changes, billing code changes, <u>and</u> contact changes.
<p>When can I expect the changes to be made?</p>	<p>Billing code and name changes are generally completed within 2 business days.</p> <p><u>Exceptions</u>:</p> <ol style="list-style-type: none"> 1. Further research or authorization is needed (e.g. the new billing code you have requested is not within your designated range of authority so the existing contact on file needs to be notified). 2. The full GL code is new to the telecom billing system. If the request is submitted after the deadline to meet the monthly close (usually the 18th of the month), then the change will not appear until the following month’s close. You will be notified by email in either case.
<p>What is the process?</p>	<p><u>What you can expect</u>:</p> <ol style="list-style-type: none"> 1. Submit a change request <u>once</u> 2. Receive an email within 1 full business day that your request was <u>received</u> 3. Receive an email <u>confirmation</u> once the request has been completed in the billing system (generally within 2 business days) 4. You should not have to make billing code changes via journals. 5. If you feel there is an error, please contact us immediately. 6. Be sure to bring any billing disputes to our attention within 60 days.

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	<p><u>How to submit requests:</u></p> <ol style="list-style-type: none"> 1. The <u>preferred</u> method is to access TORTE at https://torte.uis.harvard.edu. You may also send an email to telecom_billing@harvard.edu. Name changes can also be submitted as part of a telephone work order request through telecom_orders@harvard.edu. 2. While in TORTE, go to <u>View Forms</u> and select one of the following forms: <ul style="list-style-type: none"> ▪ <i>Individual Billing Code Change Request</i> to change billing on any single billing number ▪ <i>Billing Number Name Change Request</i> for name changes ▪ <i>Global Billing Code Change Request</i> to change all billing from one G/L to another 3. Fill out the form and press <i>Submit</i>. This will send your request to the Telecom Billing Group and will send a notification of receipt to your e-mail address. 4. You will also receive a confirmation when your request has been completed. <p><u>Note:</u> There are detailed instructions on the forms in the TORTE User Guide (located in the drop-down menu called <i>TORTE Information</i> at the top of the TORTE homepage.)</p> <p><u>The information required is as follows:</u></p> <ol style="list-style-type: none"> 1. <i>Name change:</i> provide the current and new user name for the specific telephone line. Specific names are highly preferable to location names such as “left corner” since the equipment record shows the line/set location. 2. <i>Billing code change:</i> provide the current and new billing code and the billing numbers(s) on which you want the code(s) changed.
<p><u>Where</u> are the changes made?</p> <p><u>How</u> can I verify this?</p>	<p>The name and billing code changes will be updated both in TORTE (electronic view of the data) and Mysoft (the billing system database).</p> <p><u>Name</u> changes are visible in TORTE as soon as the change is complete. Name changes will NOT be reflected in the <u>on-line directory</u> automatically, so it is important to pass along staffing changes to your directory contacts.</p> <p><u>Billing code</u> changes are visible and can be verified in TORTE in many reports as soon as the change has been completed and you have received the confirmation email (e.g. the <i>Single Billing Number Report</i> and the <i>Inventory Download</i>). The change(s) will become visible in the electronic statements once the next billing cycle is complete and the billing data is made available. In summary, the current month’s TORTE billing statement shows history; the following month will reflect the change.</p>

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<p>How can I get help if needed?</p>	<p>If you have any <u>questions</u> related to telecom billing, contact a Billing Administrator: (49) 5-5457 or telecom_billing@harvard.edu</p> <p>If you have questions related to using the TORTE forms, contact (99)8-6783 or uis_torte@harvard.edu</p> <p>Any <u>issues or concerns</u> can be directed to:</p> <ol style="list-style-type: none">1. Jennifer Theodos, Team Leader (49) 5-5167 jennifer_theodos@harvard.edu2. Laurie Gamble, Billing Manager (49) 5-4939 laurie_gamble@harvard.edu
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