



Version 1

Change Order 5

BSOW-337 - Hansen CIS SaaS Implementation

Bill Analyst Proficiency Workshop

City of Kingsport

September 2026

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Change Order xxx

BSOW-337 - Hansen CIS SaaS Implementation

Bill Analyst Proficiency Workshop

City of Kingsport

Part I—Change Request Information

Project Name:

BSOW-337 - Hansen CIS SaaS Implementation

Change Order #:

COxxx

Change Request Name:

COxxx - BSOW-337 - Hansen CIS SaaS Implementation – Bill Analyst Proficiency Workshop

Customer #:**Date Requested:**

10-Sept-2026

Requester:

Floyd Bailey

☒ Custom ☐ Base**Project Phase / Reference Document #:**

- | | |
|---|---|
| ☒ Scope | BSOW-337 - Hansen CIS SaaS Implementation |
| ☐ Project Definition | _____ |
| ☐ Functional Design | _____ |
| ☐ Technical Design | _____ |
| ☐ Construction | _____ |
| ☐ Testing/QA | _____ |
| ☐ Support | _____ |

Basis for Change:

- | |
|---|
| ☒ Scope |
| ☒ Resource Allocation |
| ☐ System Environment |
| ☐ Subsystem Interface |
| ☐ Procedure/Policy |
| ☐ Resolution of Issues |
| ☐ Project Assumptions |
| ☐ Regulatory Requirements |

Description/ Justification:

This is a Change Order (CO) to the City of Kingsport Statement of Work "City of Kingsport Statement of Work" ("SOW") that was effective October 4th, 2024.

This CO is effective as of the last signature date in Part II - Approvals ("Effective Date") by and between Hansen Banner, LLC, a Delaware Corporation with a place of business at 700 Gervais Street, Suite 100,

Part I—Change Request Information

Columbia, SC 29210 ("Hansen") and the City of Kingsport ("the City" or "Client") whose registered office is at 415 Broad Street, Kingsport, Tennessee, 37660. In the event of any conflict in the terms between this CO and the SOW, the terms of this CO shall prevail. All capitalized terms not otherwise defined in this CO shall have the same meaning as in the SOW.

Scope of Work

The City of Kingsport has requested additional training services to enhance staff proficiency in billing operations, exception management, and off-cycle billing processes. This workshop is intended for City personnel responsible for managing billing exceptions, processing off-schedule billing activities, and supporting day-to-day billing operations.

Hansen will deliver targeted knowledge transfer and hands-on training focused on current billing challenges, operational best practices, and effective exception-handling procedures. The workshop will leverage real-world scenarios and issues currently being experienced by the City to improve staff understanding of system functionality, increase operational efficiency, and reduce reliance on manual intervention.

As part of this engagement, Hansen will provide guidance and recommendations designed to strengthen business processes, improve user proficiency, and support the City's goal of returning to a stable, automated billing operation. The intended outcome is to enable the City to consistently utilize the automated billing scheduler as designed and minimize the need for off-cycle or manually managed billing activities.

This five-day workshop will strengthen the City's operational proficiency in meter reading, billing-cycle execution, exception resolution, process scheduling, billing adjustments, and inbound service order management. Through scenario-based instruction and hands-on simulations, participants will develop the capability to identify root causes, apply appropriate corrective actions, validate processing results, and manage customer-impact risks. The workshop will reinforce scheduler-driven operations, consistent process controls, effective escalation practices, and coordinated handoffs across Billing, Meter Operations, Field Service, Customer Service, and technical support teams. The program is expected to improve billing reliability, reduce exception backlogs and operational rework, strengthen cross-functional accountability, and support consistent service delivery.

▪ Workshop Objectives

- ✓ Improve participant proficiency in identifying, researching, prioritizing, and resolving meter reading exceptions that impact billing-cycle execution, customer service, and operational performance.
- ✓ Strengthen the ability to assess billing-cycle readiness through disciplined evaluation of reading completion, exception backlogs, operational dependencies, and process controls.
- ✓ Enhance capability to manage billing exceptions by addressing root causes, applying appropriate corrective actions, and validating processing outcomes.
- ✓ Develop proficiency in restoring and maintaining scheduler-driven billing operations while reducing operational risk associated with manual process execution.
- ✓ Strengthen process governance through effective validation of billing parameters, processing

Part I—Change Request Information

controls, approvals, and release readiness criteria.

- ✓ Increase participant capability to identify and mitigate customer-impact risks, including duplicate billing, premature billing, AutoPay impacts, and downstream payment-processing concerns.
- ✓ Improve proficiency in selecting and applying appropriate adjustment and correction methods while ensuring accurate financial and operational results.
- ✓ Establish consistent escalation, documentation, and operational handoff practices that support timely issue resolution, knowledge transfer, and process continuity.
- ✓ Validate participant ability to execute and control a complete billing-cycle scenario through realistic, end-to-end operational simulations and qualification exercises.
- ✓ Enhance cross-functional effectiveness by improving the identification, resolution, and coordination of inbound service order exceptions that affect service activation, meter activities, service history, billing readiness, and overall operational performance.

▪ Agenda(s)

✓ Day 1: Meter Reading Readiness and Exception Control

- Primary Audience: Billing Analysts
- Secondary Audience: Meter Operations Supervisors and Meter Reading Leads
- Schedule: 9:00 AM to 4:00 PM
- Lunch: 12:00 PM to 1:00 PM
- Day 1 Outcome: Participants will improve their ability to evaluate meter reading completeness, resolve common reading exceptions, manage estimated reads, and coordinate unresolved field conditions before billing begins.

Time	Topic	Learning Objective
9:00-9:30	Workshop Orientation and Operational Lessons Learned	Explain how incomplete readings and unresolved exceptions affect billing-cycle execution.
9:30-10:15	Reading-to-Bill Operating Model	Understand the dependencies among Meter Operations, Billing, and billing-cycle processing activities.
10:15-10:30	Break	
10:30-11:15	Reading Completeness and Route Reconciliation	Determine whether meter-reading data is complete and ready for billing.
11:15-12:00	Aged Reads and Repeated Estimates	Identify services requiring actual reads, field investigation, or escalation.
12:00-1:00	Lunch	

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1:00-2:00	Meter Reading Exception Resolution	Research and resolve common meter-reading exceptions.
2:00-2:15	Break	
2:15-3:00	Estimated-Read Decisions	Select and apply appropriate estimation methods and controls.
3:00-3:35	Meter Operations-to-Billing Handoff	Establish clear ownership and communication for unresolved reading issues.
3:35-4:00	Day 1 Proficiency Exercise	Demonstrate proficiency in reading readiness and exception resolution.

✓ Day 2: Scheduler Restoration, Billing Processing, and Release Controls

- Primary Audience: Billing Analysts
- Secondary Audience: Billing Supervisors and CIS Support Leads
- Schedule: 9:00 AM to 4:00 PM
- Lunch: 12:00 PM to 1:00 PM

Time	Topic	Learning Objective
9:00-9:20	Day 1 Review	Reinforce the relationship between meter-reading readiness and billing execution.
9:20-10:00	Scheduler-First Billing Model	Understand the role of batch scheduling in billing operations.
10:00-10:45	Scheduler Monitoring and Recovery	Monitor scheduled jobs and safely recover failed processes.
10:45-11:00	Break	
11:00-11:40	Cycle Readiness Decision	Apply objective criteria to determine cycle readiness.
11:40-12:00	Manual Processing Governance	Differentiate approved recovery processing from ad hoc manual processing.
12:00-1:00	Lunch	
1:00-1:50	Billing Process Parameter Validation	Validate critical billing parameters before processing.
1:50-2:35	Billing Exceptions and Overrides	Research and resolve billing exceptions while applying proper controls.
2:35-2:50	Break	
2:50-3:25	Register Reconciliation and Release	Validate billing results before bill production and release.

Part I—Change Request Information

3:25-4:00	Integrated Processing Exercise	Apply scheduling, parameter validation, exception resolution, and release controls in a complete billing scenario.
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✓ Day 3: Customer Safeguards, Adjustments, Escalation, and Handoffs

- Primary Audience: Billing Analysts
- Secondary Audience: Customer Service Supervisors and Billing Leadership
- Schedule: 9:00 AM to 4:00 PM
- Lunch: 12:00 PM to 1:00 PM

Time	Topic	Learning Objective
9:00-9:20	Bill Release Control Review	Reinforce billing release controls and verification requirements.
9:20-10:05	Duplicate-Billing Prevention	Identify and prevent premature or duplicate billing scenarios.
10:05-10:45	Paymentus and AutoPay Impacts	Evaluate billing decisions that may affect customer payment processing.
10:45-11:00	Break	
11:00-12:00	Billing Adjustment Decision Lab	Select appropriate billing adjustment and correction methods.
12:00-1:00	Lunch	
1:00-1:35	Escalation Documentation	Prepare complete and actionable escalation packages.
1:35-2:05	Operational Handoff	Create effective operational handoffs between team members.
2:05-2:20	Break	
2:20-3:35	Reduced-Coverage Continuity Planning	Prioritize and manage critical billing activities during staffing fluctuations.
3:35-4:00	Day 3 Assessment	Demonstrate proficiency in customer safeguards, adjustments, escalation, and handoffs.

✓ Day 4: Full Billing-Cycle Simulation and Team Qualification

- Primary Audience: Billing Analysts
- Secondary Audience: Billing Managers, Team Leads, and Trainers
- Schedule: 9:00 AM to 4:00 PM
- Lunch: 12:00 PM to 1:00 PM

Part I—Change Request Information

Time	Topic	Learning Objective
9:00-9:20	Simulation Briefing	Understand simulation goals, controls, and evaluation criteria.
9:20-10:05	Cycle Readiness Simulation	Assess and document billing-cycle readiness.
10:05-10:50	Reading Exception Simulation	Resolve a mixed population of meter-reading exceptions.
10:50-11:00	Break	
11:00-12:00	Scheduler and Parameter Simulation	Recover a failed billing process and validate parameters.
12:00-1:00	Lunch	
1:00-1:50	Billing Exception and Register Simulation	Resolve billing exceptions and validate billing results.
1:50-2:30	Customer Impact and Adjustment Simulation	Evaluate customer-impact risks and select correction methods.
2:30-2:40	Break	
2:40-3:20	Escalation and Handoff Simulation	Produce complete escalations and operational handoffs.
3:20-4:00	Qualification Review	Assess participant proficiency and cross-coverage capability.

✓ Day 5: Inbound Service Order Exception Resolution

- Primary Audience: Field Service Order Managers
- Secondary Audience: Billing Analysts, Meter Operations Supervisors, and CIS Support Staff
- Schedule: 9:00 AM to 12:00 PM

Time	Topic	Learning Objective
9:00-9:20	Inbound Service Order Lifecycle	Understand how inbound exceptions prevent service-order closure and impact billing operations.
9:20-9:45	Investigation and Triage	Apply a consistent process to research, classify, and assign inbound service order exceptions.
9:45-10:10	CCASVOX Action Selection	Select the appropriate exception resolution action and follow-up path.
10:10-10:20	Break	
10:20-10:50	Reading and Register Exceptions	Resolve inbound exceptions affecting meter readings and register activity.

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10:50-11:15	Activation and Move-In Exceptions	Resolve or route account activation and service-history exceptions.
11:15-11:35	Meter Installation Exceptions	Diagnose and resolve meter installation, inventory, and communication-device exceptions.
11:35-11:50	Billing Dependencies	Identify situations where Billing involvement is required to resolve inbound exceptions.
11:50-12:00	Integrated Resolution Exercise	Demonstrate ownership, verification, escalation, and cross-functional coordination.

This approach is estimated at 40 hrs. and includes the following deliverables

- Training materials where applicable
- Onsite Instructor Led Sessions

Part II - Impact Analysis – HansenCIS Services

Total Hours (Time and Materials):	40 Hrs			
Rate: USD	See rates in the Total Charges section below.			
Total Charges (Time and Materials): The number of hours of effort represents an estimate only. Actual service fees will vary according to the number of person-hours of services rendered. All services are provided on a time and materials basis.	Roles	Rate	Estimated Hours	Estimated Cost
	Business Analyst	\$200.00	36 Hrs.	\$7,200.00
	Project Management	\$225.00	4 Hrs.	\$900.00
	Totals		40 Hrs	\$8,100.00
Impact of Change Request Denied: Services will not be provided as requested.				

Part III—Approvals

☐ Approve
 ☐ Cancel
 ☐ Defer

City of Kingsport

Date

Part III—Approvals	
☐ Approve ☐ Cancel ☐ Defer	
Hansen Banner LLC	Date

Part IV - Document Change Log				
Document	Assigned To	Date Due	Completion	Comments
Technical Specification				
Functional Specification				
Project Definition				
Release Notes				
User Documentation				