VITA Agency – Rebilling User Guide

Calero.com for VITA

Last Edited: June 1, 2026

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Jackie Blake		13 Aug. 2024	

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Introduction

This user guide outlines the VITA Agency rebill process from start to finish. It details how agency users are notified of invoices for review, the layout of the summary invoice, the list views and analytics of detailed invoice charges with call traffic for invoice validation, and the process for disputing charges.

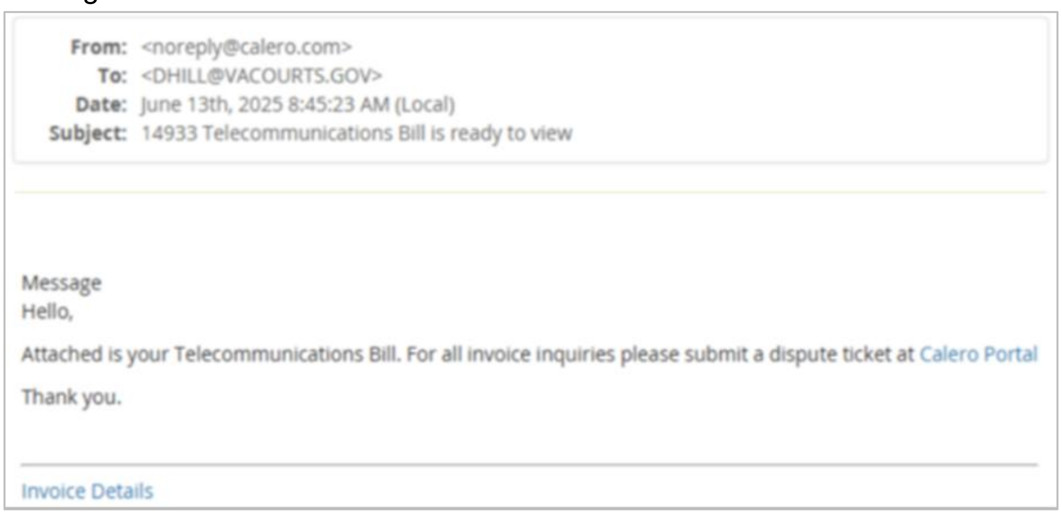
Intended Audience

VITA Agencies and Customers using Calero.com

Security Group: Billing Contact and Bill Payer

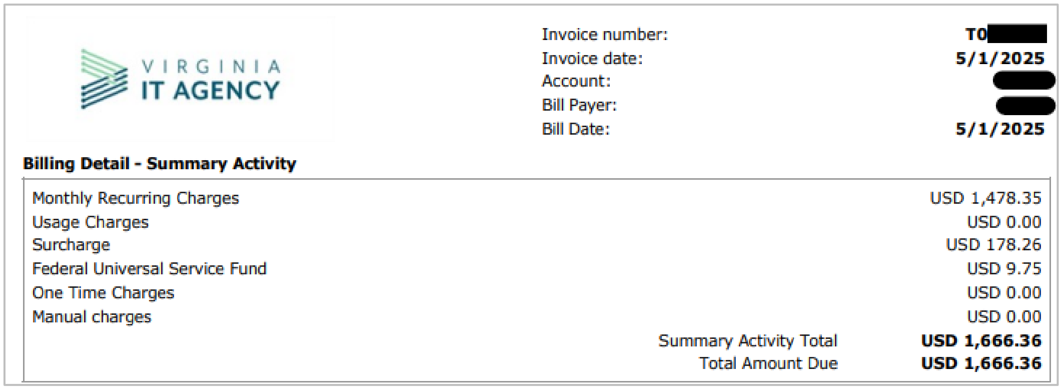
Receipt and Notification of Invoices

1. An email will be sent to notify the agency when the Telecommunications Bill is ready for viewing.



2. If needed, select the **Calero Portal** hyperlink to submit a dispute ticket for any invoice inquiries. Users will need to be logged into Calero.com for the link to work.

3. The email will contain an invoice copy that outlines the **Billing Detail - Summary Activity** that breaks down the invoice total by charge categories.



VIRGINIA IT AGENCY

Invoice number:	TO[redacted]
Invoice date:	5/1/2025
Account:	[redacted]
Bill Payer:	[redacted]
Bill Date:	5/1/2025

Billing Detail - Summary Activity

Monthly Recurring Charges		USD 1,478.35
Usage Charges		USD 0.00
Surcharge		USD 178.26
Federal Universal Service Fund		USD 9.75
One Time Charges		USD 0.00
Manual charges		USD 0.00
	Summary Activity Total	**USD 1,666.36**
	Total Amount Due	**USD 1,666.36**

Review and Validation – List Views

There are various list views to assist with the validation of invoice charges and call detail records.

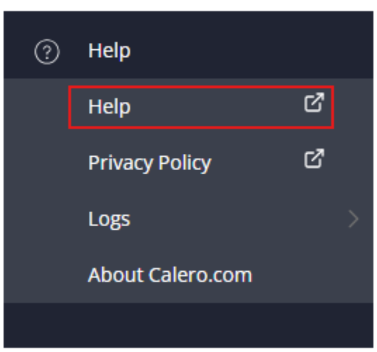
Help and List Views Features

Help

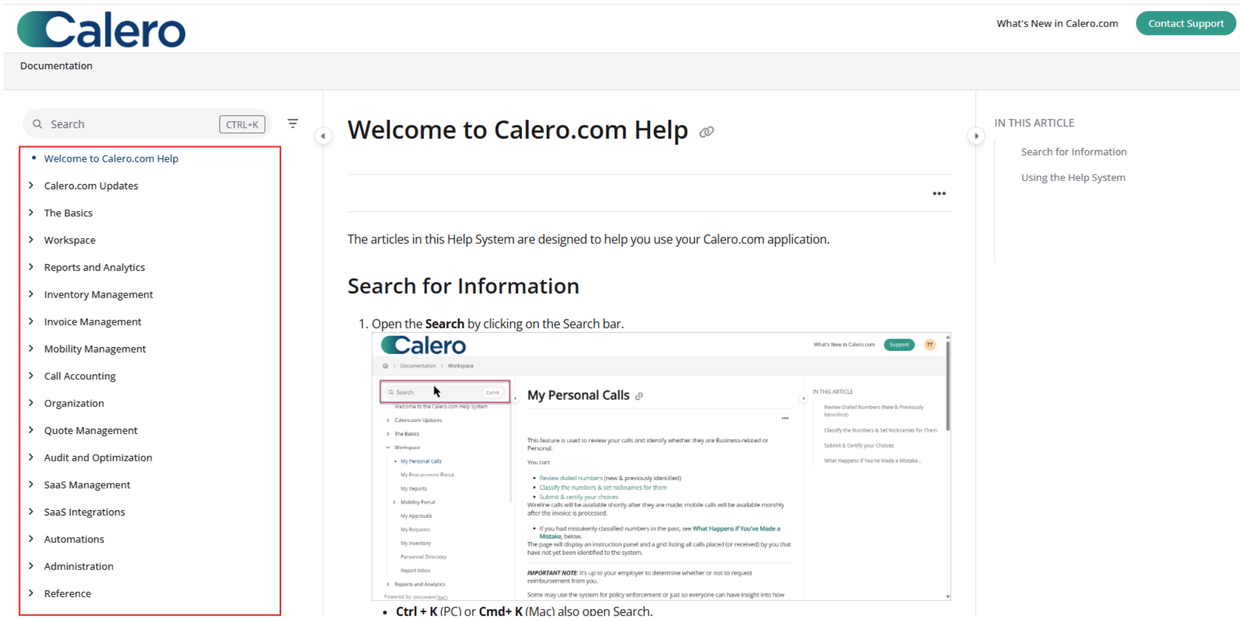
Information on navigating the system and understanding screen and report content can be found in the **Help** section of Calero.com. There are multiple ways to access the Calero.com Help section.

Access Help —

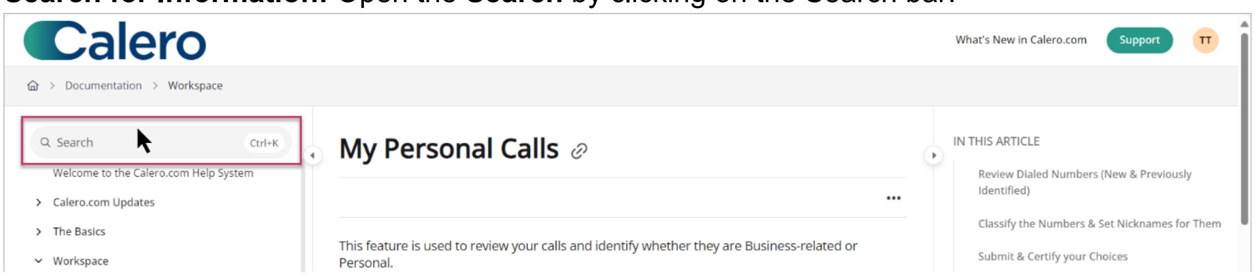
- Open the context-specific Help:
  - Using the question mark search icon in the top right corner.
  - Main Menu Toolbox (gear icon) > Help on this page.
- Alternate: Use the Help module in the bottom left corner of the Main Menu.



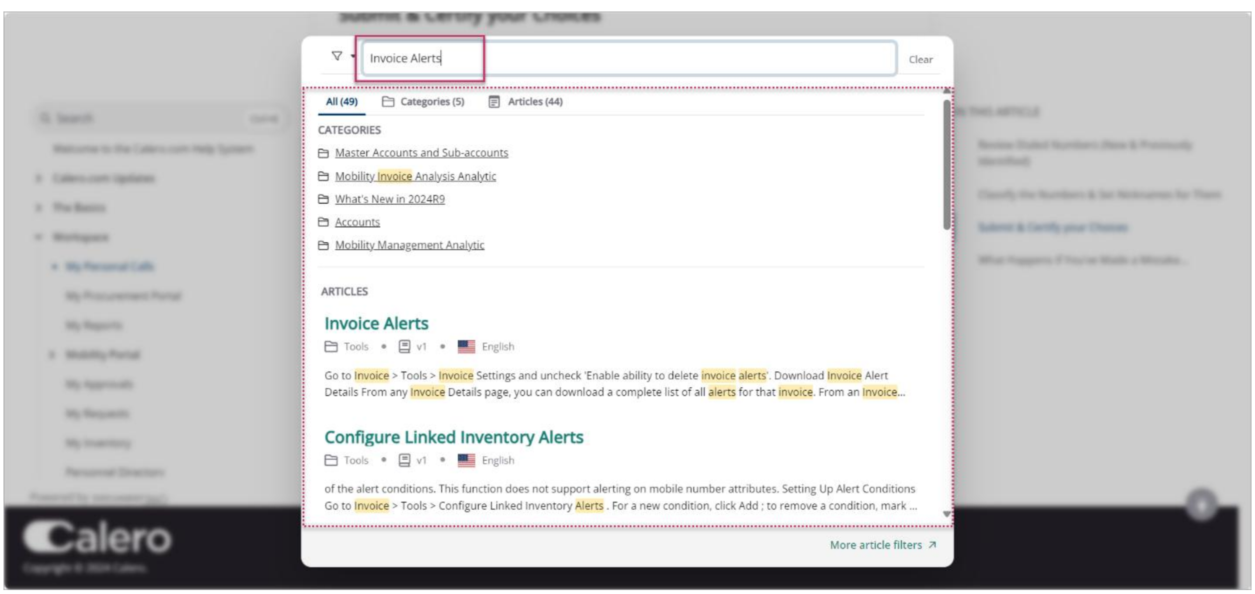
There are help pages for each section of the platform.



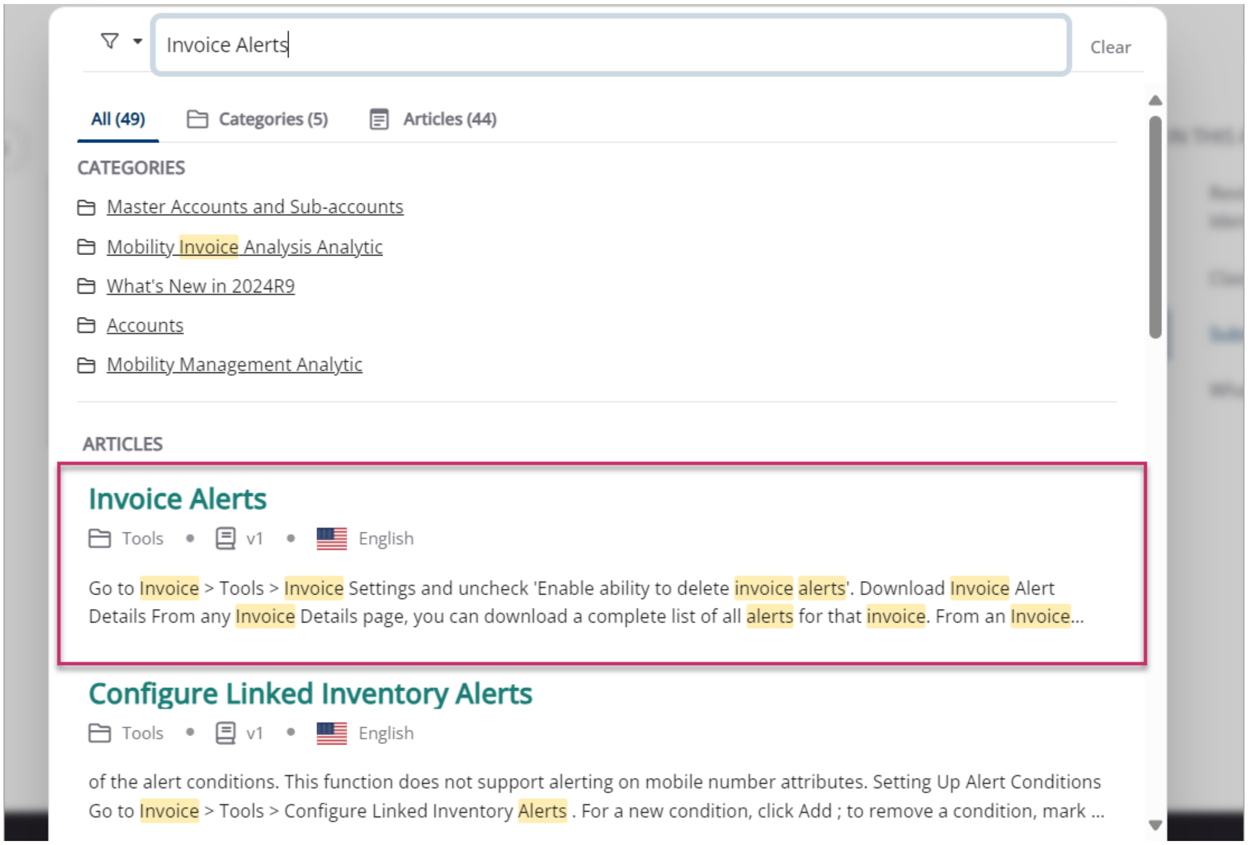
Search for Information: Open the **Search** by clicking on the Search bar.



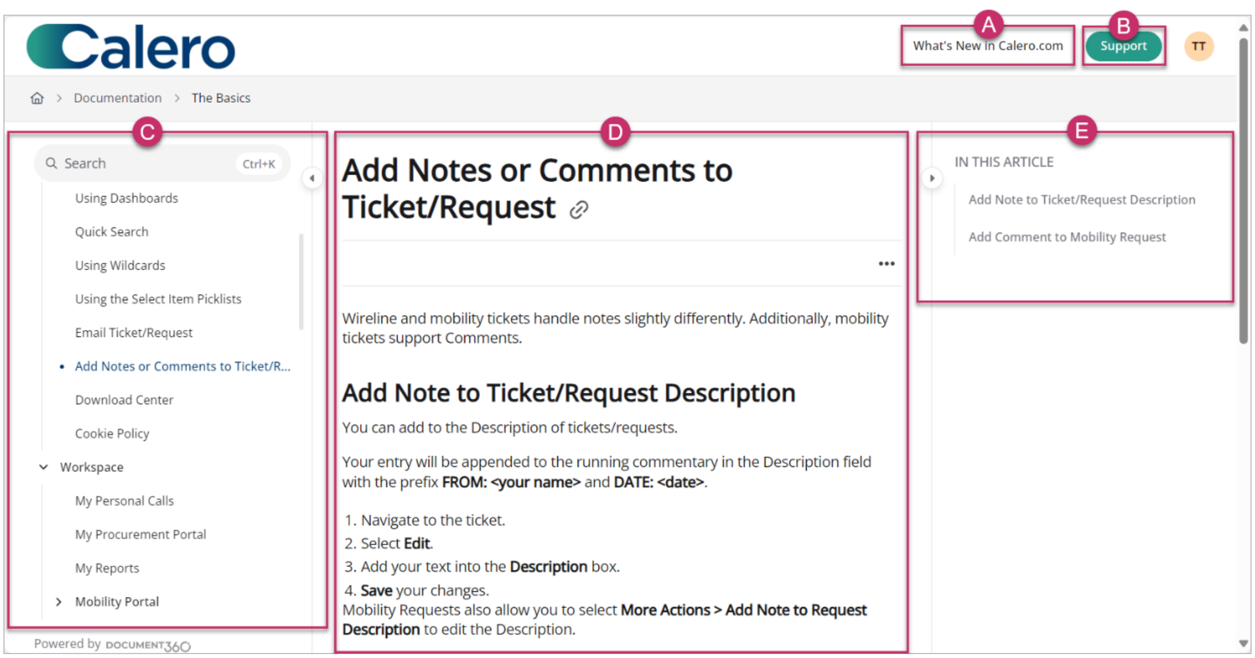
Start typing keywords and the general search results will appear. The words you search for will be highlighted in yellow for your convenience.



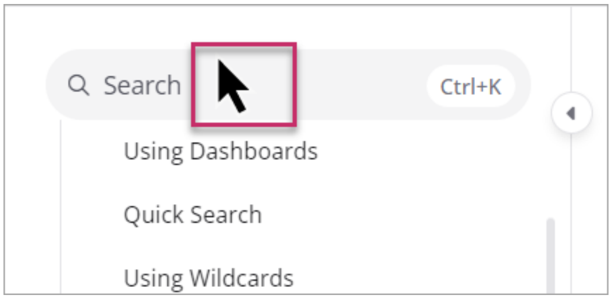
Select a **Category** or **Article**, or add more filters to narrow search results.



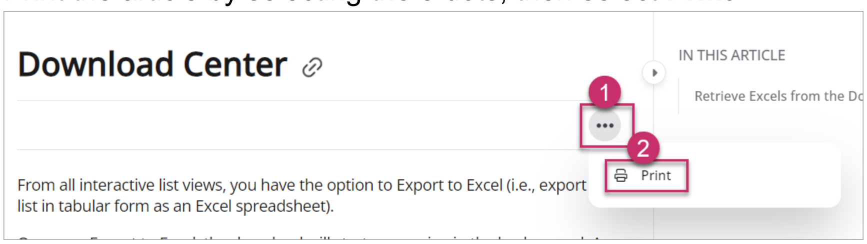
Using the Help System



A. **What's New in Calero.com** — Access the Calero Updates and review What's New in Calero.com and Release Notes.
B. **Support** — This functionality is not VITA applicable due to VITA restrictions. If you need support, please submit a communication ticket referenced here: Communication Tickets
C. **Menu** — Expand sections in the menu on the left to browse through the articles.
   - Click into the **Search** bar to open Search options.



D. **Article** — Read the Help article for this topic.
   - Print the article by selecting the 3 dots, then select **Print**.



E. **Table of Contents** — Use the **Table of Contents** to jump between sections of text in an article.

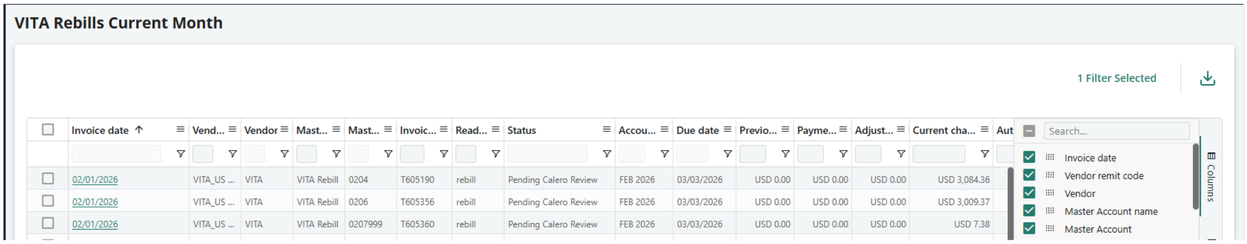
If you ever get lost or have a question about a specific report, page or process, you can find the information in the **Help** section.

List Views

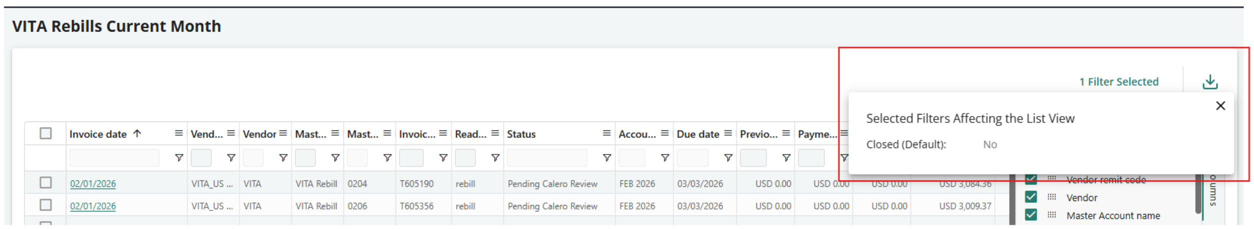
There are some commonly used features and filters of list views that you will want to be familiar with. Guidance on performing basic functions—such as downloading report data or customizing your view—can be found by following this breadcrumb from the main menu: **Help > Help > The Basics > The User Interface**.

Filter Data

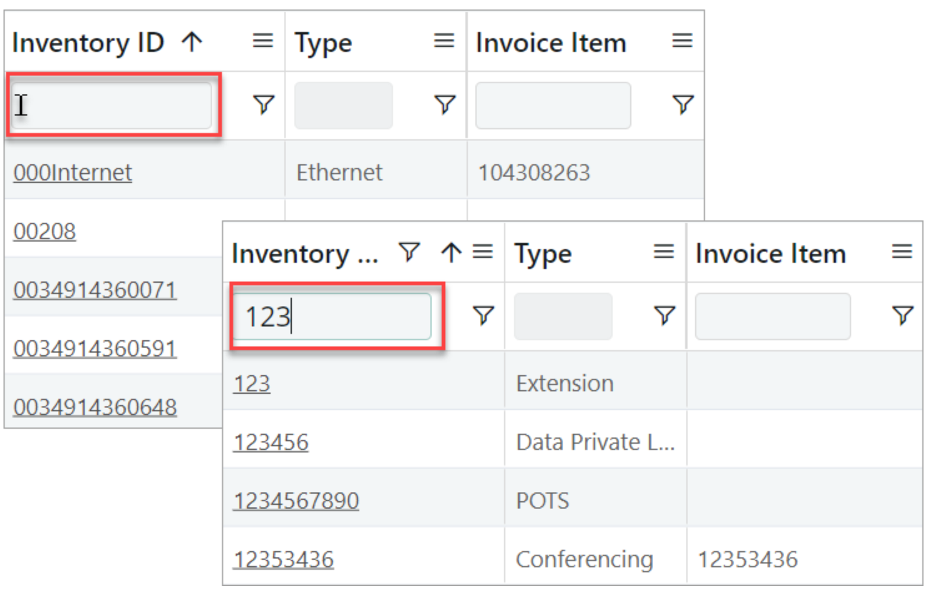
Some list views have fixed filters that are applied automatically. These filters help prevent the landing page from loading excessive amounts of data. The most common fixed filter limits list view data (such as invoices, communications, disputes and order tickets) to open items only.



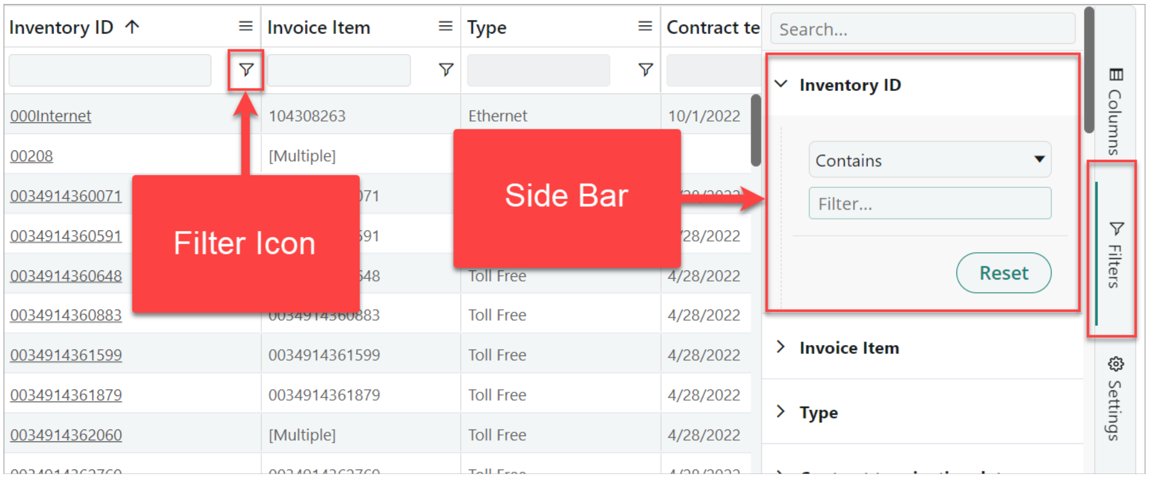
You can view which filters are applied by selecting **Filters Selected** in the top-right corner of the list view landing page. In the example above, **1 Filter Selected** is shown. The applied filter is **Closed = No**, which means all open items are displayed.



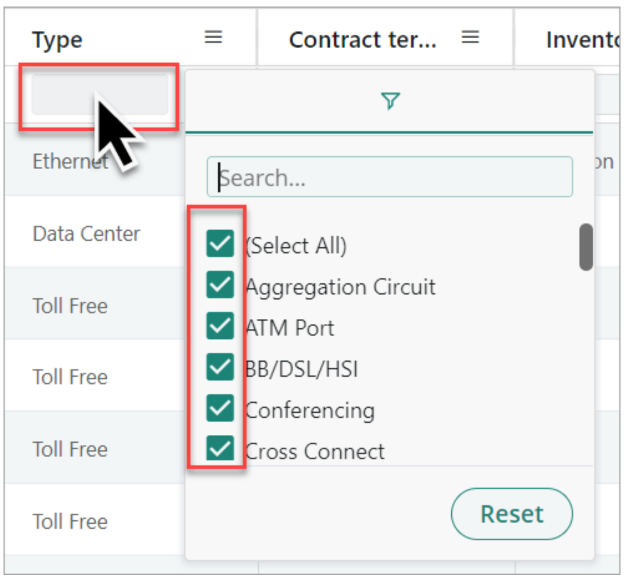
Filters can be applied or removed using the **Filter** icon or the **Filters** tab in the side bar.

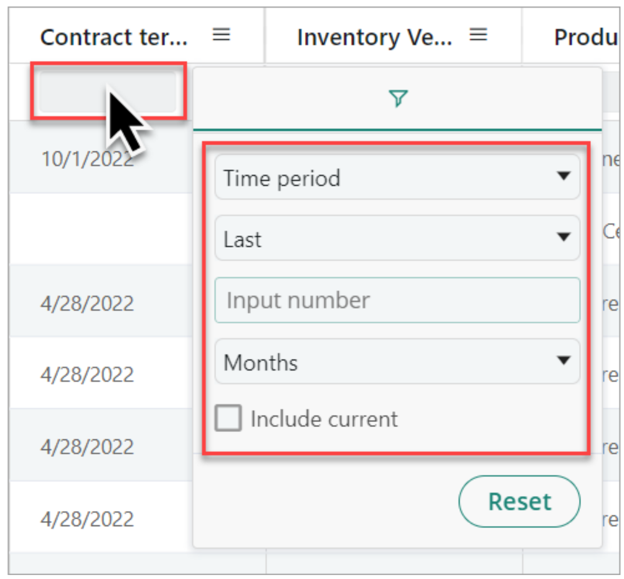


Select **Filters**, then expand the field you want to filter (or a field that already has a filter applied). Use the drop-down menu to choose the data you want to filter by.

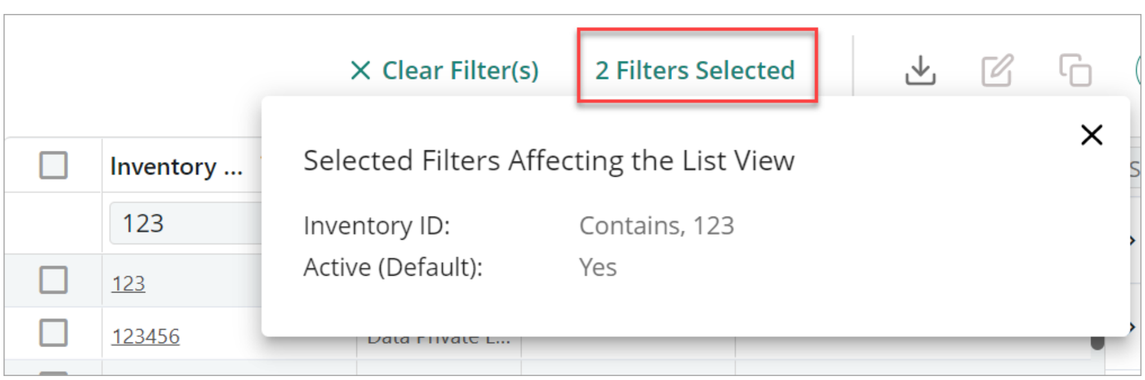


Filter type will vary depending on the field type.

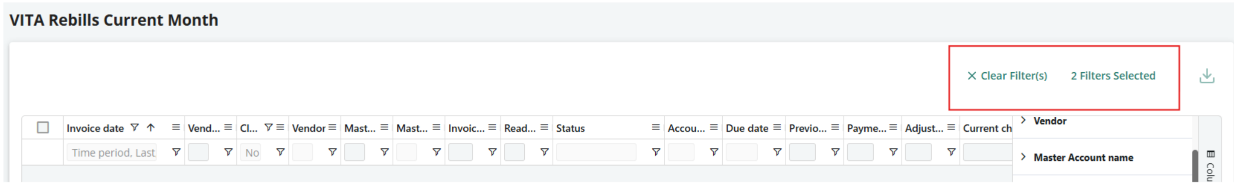




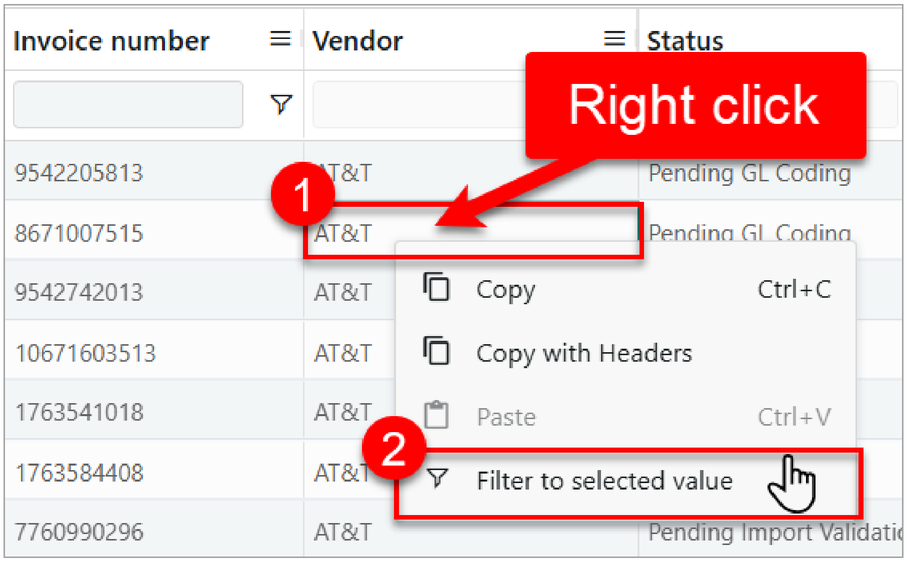
Select **[N] Filters Selected** to see which filters are affecting the list view.



Select **Clear Filter(s)** to remove filters (including any automatically applied) from all columns.

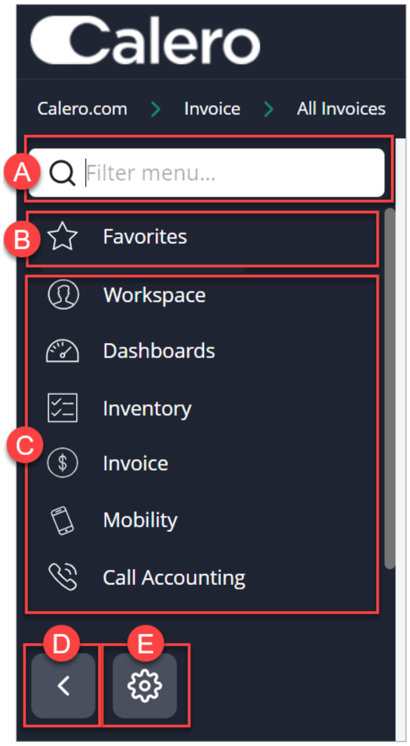


Right-click into a cell and select **Filter to selected value** to filter the list view to the value of a single cell.



Features / Functionality:

Main Menu section covers a few key features

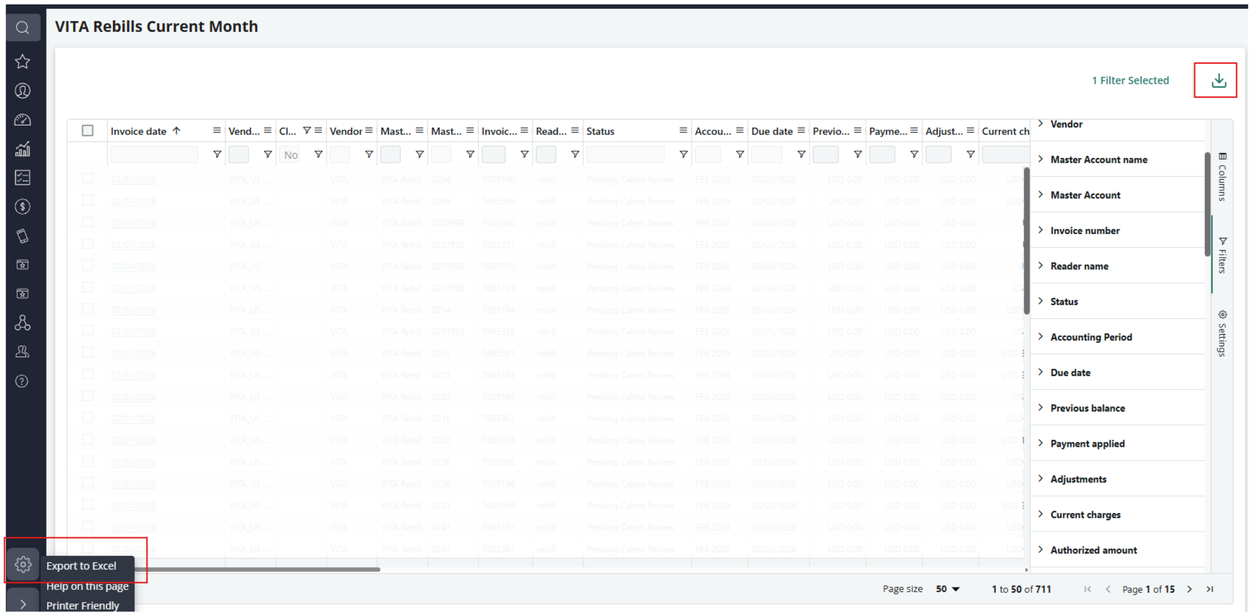


A. **Menu filter** – Enter text into the filter menu box to filter the main menu and find specific pages.
B. **Favorites section** – Add "Favorite" pages to your Favorites section to quickly access your most-used functions, pages and/or user reports
   - **Add a Favorite** – Select an outlined star next to the menu listing to add a page to your Favorites.
   - **Remove a Favorite** – Select a solid star (i.e., deselect) to remove the page from your Favorites.
C. **Sections** – List will vary based on your licenses and system configuration.
D. **Minimize/Expand Main Menu** – Select the icon to minimize/maximize the menu.
E. **Main Menu Toolbox** – Select the gear icon and choose an action to take for that page. Actions vary by page.
   - Edit views on this page
   - Export to Excel
   - Help on this page
   - Printer Friendly

Export – You may often want to export data from a list view. There are two ways to do this:

• In the top-right corner, select the **Download** button.

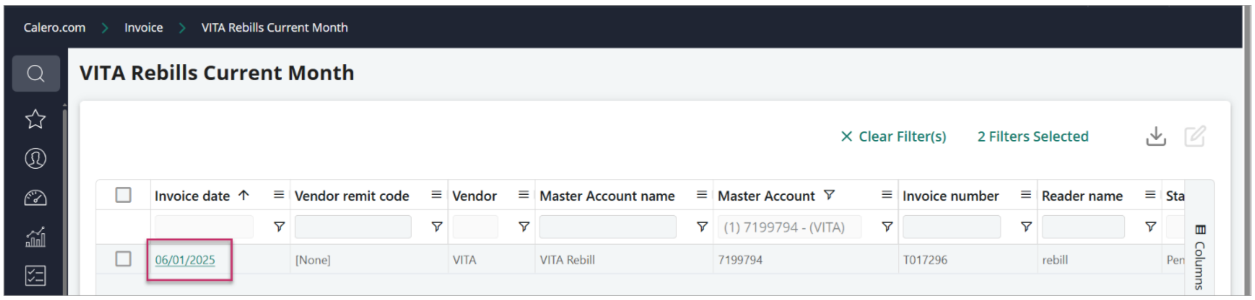
• In the bottom-right corner, select the **cog (settings)** icon and choose **Export to Excel**.



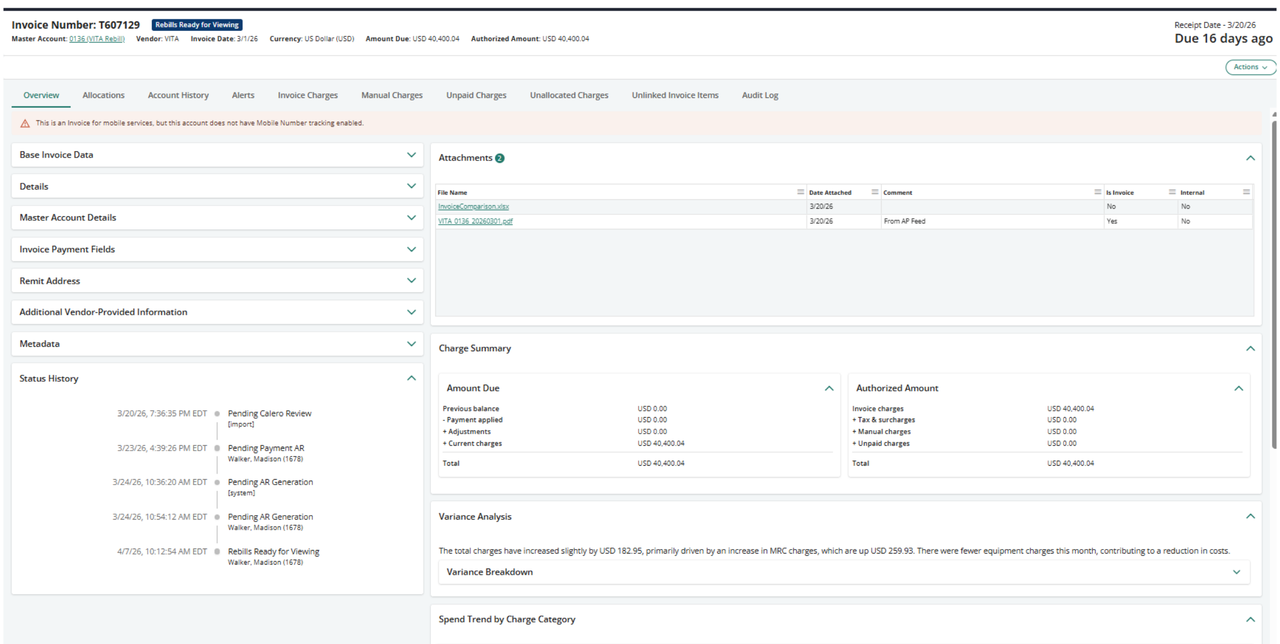
VITA Rebills Current Month

The “VITA Rebills Current Month” list view only displays the current month's telecommunications bill.

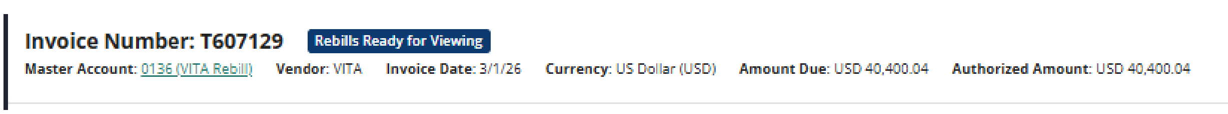
1. Go to **Invoice > Work Queues > VITA Rebills Current Month**.
2. Select an **Invoice date** to open the Invoice Detail to view the invoice charges and attachments.



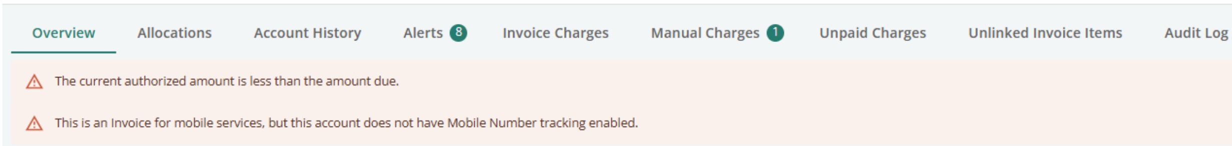
3. From the Invoice Detail page, you can view invoice attributes, charge details, attachments, etc.



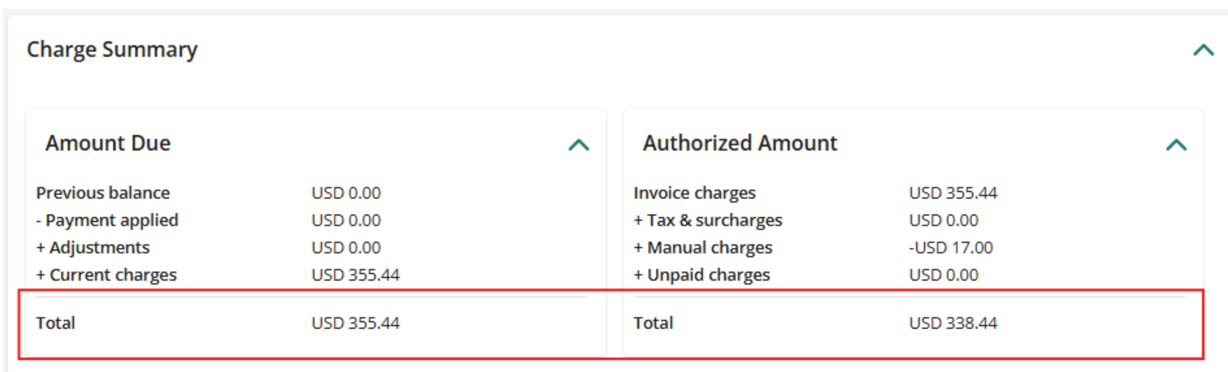
The top portion of the Invoice Detail page shows high-level information: Invoice Number, Status, Master Account Number, Vendor, Invoice Date, Currency, Amount Due and Authorized Amount.



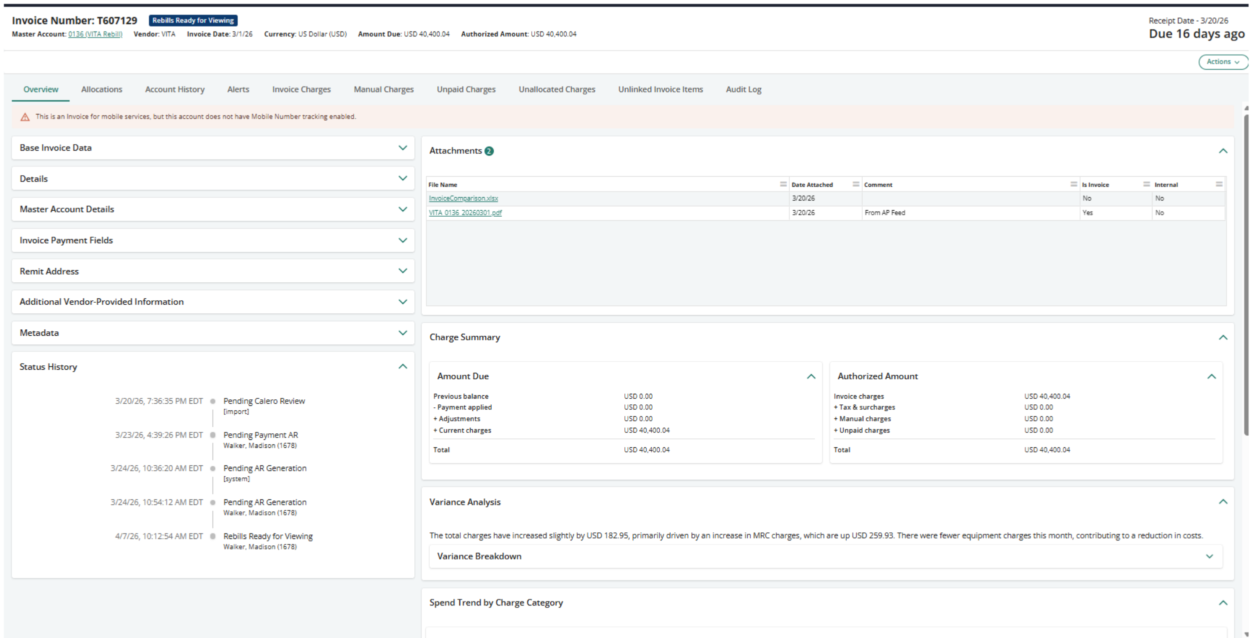
There may be alert icons ⚠ to draw your attention to certain scenarios. VITA agencies will not need to take action on any of these. It's more for informational purposes. Outlined below are the alerts you may see, a description, and any steps taken to review.



- ⚠ **This is an Invoice for mobile services; but this account does not have Mobile Number tracking enabled.** (This will create mobile inventory for each unlinked item in this invoice. It will also update the Master Account to create mobile inventory in future invoices)
- ⚠ **The current authorized amount is less than the amount due.** – This alert will appear if the Authorized Amount (the invoice total amount due) does not equal the Amount Due (the account total amount due). There are few possible causes of this. There could be an underpayment or overpayment of a previous invoice, or a manual charge or unpaid charge on the invoice itself. There is more information below about the specific tabs regarding Manual and Unpaid Charges. The amount to be paid will be the Authorized Amount.
  Example



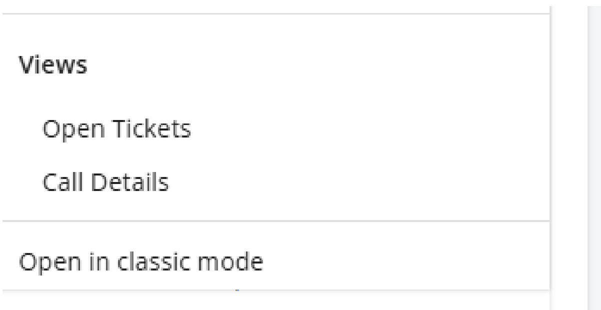
4. Navigate through the expandable sections on the overview page and other tabs to view invoice details.



- **Overview** –
  - Base Invoice Date and Charge Summary provide balance details. Previous balance, payment applied, adjustments, current charges.
  - Attachments
    - Invoice Comparison Report – Lists all invoice charges from the current month's invoice to provide a comparison to the prior month's charges, a 3-month average, and highlights any MRC variances.
    - **Invoice PDF copy**
  - Status History
  - Variance Analysis and Spend Trend by Charge Category
- **Allocations –** This tab shows invoice charges summarized by Invoice Item and Allocation string. Remember that you can select the Invoice Item or any portion of the Allocation string hyperlink to a detailed view.
- **Account History –** Outlines key invoice data for all previous invoices. Data such as Invoice Number, Invoice Date, Previous Balance, Payment Applied, Authorized Amount, Total Amount Due, Due Date, PDF attachment indicator, etc.
- **Alerts –** There are system alerts that will be reviewed and resolved prior to generating a rebill. This tab isn't applicable for rebill invoices.
- **Invoice Charges** – lists invoice items and their associated Inventory IDs, Charge Categories, Descriptions, Charge Amounts, Cost Center, Service Periods, Cost Center Descriptions and Activity Codes.
- **Manual Charges** – lists manual adjustments of charge amounts that are a result of resolved invoice disputes and/or prorations for invoice items associated with linked inventory.
- **Unpaid Charges** – This tab displays any charges marked unpaid.

- **Unallocated Charges –** This tab displays any charges not unallocated (not linked to a Bill Payer). This isn't applicable for rebill invoices.
- **Unlinked Invoice Items –** This tab displays unlinked invoice items. This isn't applicable for rebill invoices.
- **Audit Log –** This tab displays the entire historical record of the invoice. The status history section outlines each status the invoice traveled through and a time stamp. The right portion shows the time stamp action log of every modification made, username, what was changed and what the data was changed to.

5. Action options: In the top-right corner select the Action dropdown. This allows the user to take a few actions if needed.

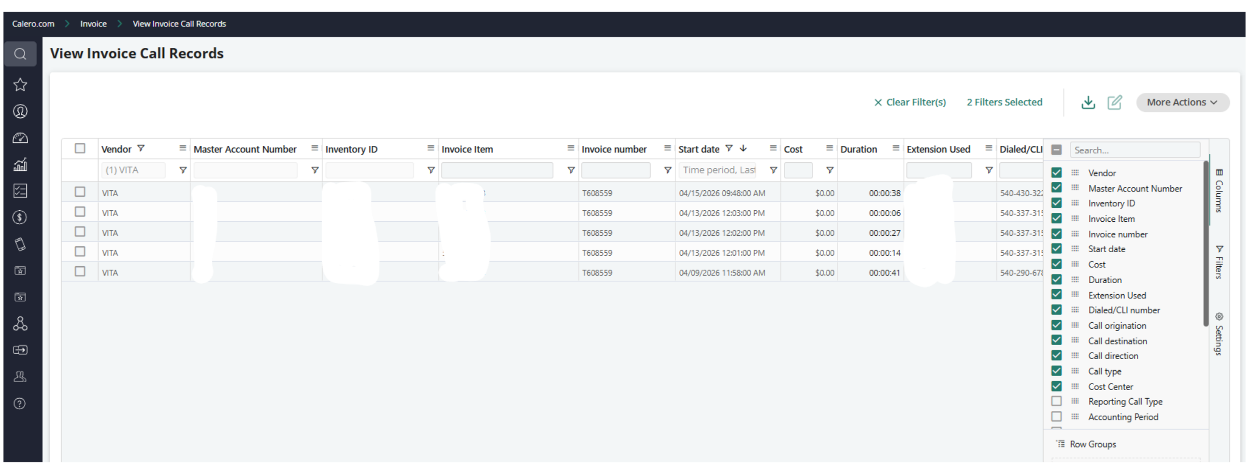


Print Invoice Voucher – provides a PDF report including the Invoice Detail page and the Allocated Charges Summary page.

Open Tickets – shows all tickets related to the Invoice.

Call Details – to review the call detail records associated with the current invoice charges.

Select "Search" to view the Invoice Call Details. By entering search criteria, you are able to narrow your records to a specific Inventory item.

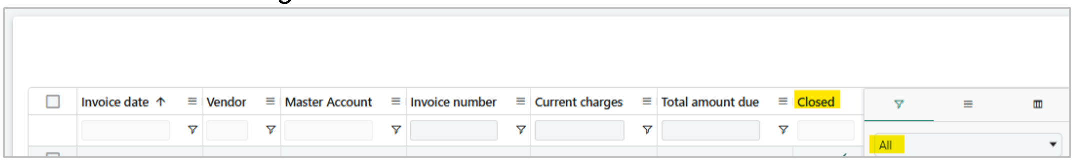


- These details can be exported by clicking the "View in Excel" icon in the upper right corner.

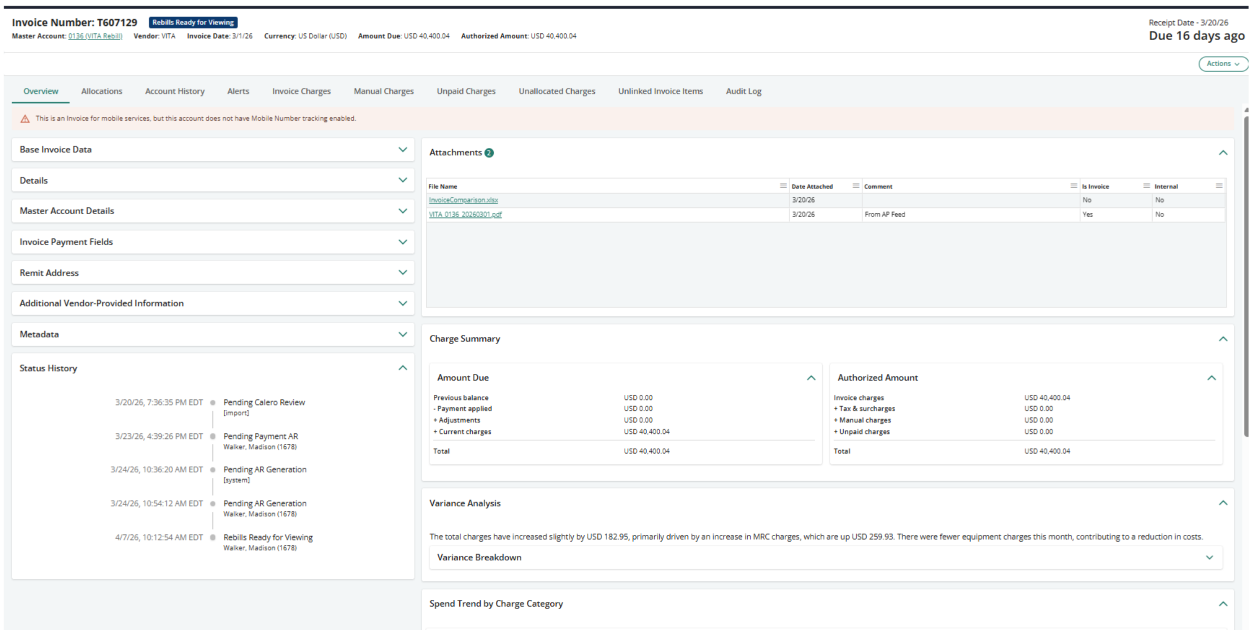
VITA Rebill All Invoices (Historical and Current Month).

The "VITA Rebill All Invoices (Historical and Current Month)" list view displays an account history of all monthly invoices.

1. Go to **Invoice** > **Work Queues** > **VITA Rebill All Invoices (Historical and Current Month)**.
2. Select the hyperlink to open the Invoice Detail to view the invoice charges and attachments.
    - If you are unable to view a specific invoice date, ensure the preset filter of **Closed = No** is changed to **Closed = All**.



3. Review the Invoice Details page:
   Navigate through the expandable sections on the overview page and other tabs to view invoice details.

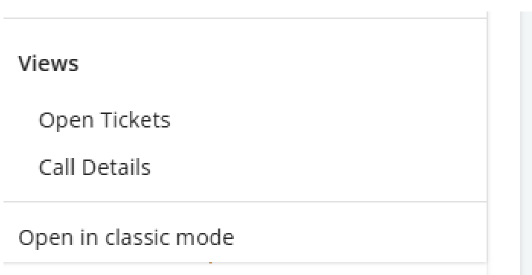


- **Overview** –
    - Base Invoice Date and Charge Summary provide balance details. Previous balance, payment applied, adjustments, current charges.
    - Attachments
        - Invoice Comparison Report – Lists all invoice charges from the current month's invoice to provide a comparison to the prior month's charges, a 3-month average and highlights any MRC variances.
        - **Invoice PDF copy**
    - Status History
    - Variance Analysis and Spend Trend by Charge Category
- **Allocations –** This tab shows invoice charges summarized by Invoice Item and Allocation string. Remember that you can select the Invoice Item or any portion of the Allocation string hyperlink to a detailed view.

- **Account History –** Outlines key invoice data for all previous invoices. Data such as Invoice Number, Invoice Date, Previous Balance, Payment Applied, Authorized Amount, Total Amount Due, Due Date, PDF attachment indicator, etc.
- **Alerts –** There are system alerts that will be reviewed and resolved prior to generating a rebill. This tab isn't applicable for rebill invoices.
- **Invoice Charges** – lists invoice items and their associated Inventory IDs, Charge Categories, Descriptions, Charge Amounts, Cost Center, Service Periods, Cost Center Descriptions and Activity Codes.
- **Manual Charges** – lists manual adjustments of charge amounts that are a result of resolved invoice disputes and/or prorations for invoice items associated with linked inventory.
- **Unpaid Charges** – This tab displays any charges marked unpaid. This isn't applicable for rebill invoices.
- **Unallocated Charges –** This tab displays any charges not unallocated (not linked to a Bill Payer). This isn't applicable for rebill invoices.
- **Unlinked Invoice Items –** This tab displays unlinked invoice items. This isn't applicable for rebill invoices.
- **Audit Log –** This tab displays the invoice's entire historical record. The status history section outlines each status the invoice traveled through and a time stamp. The right portion shows the time stamp action log of every modification made, username, what was changed and what the data was changed to.

4. Action options:

In the top right corner select the Action dropdown. This allows the user to take a few actions if needed.

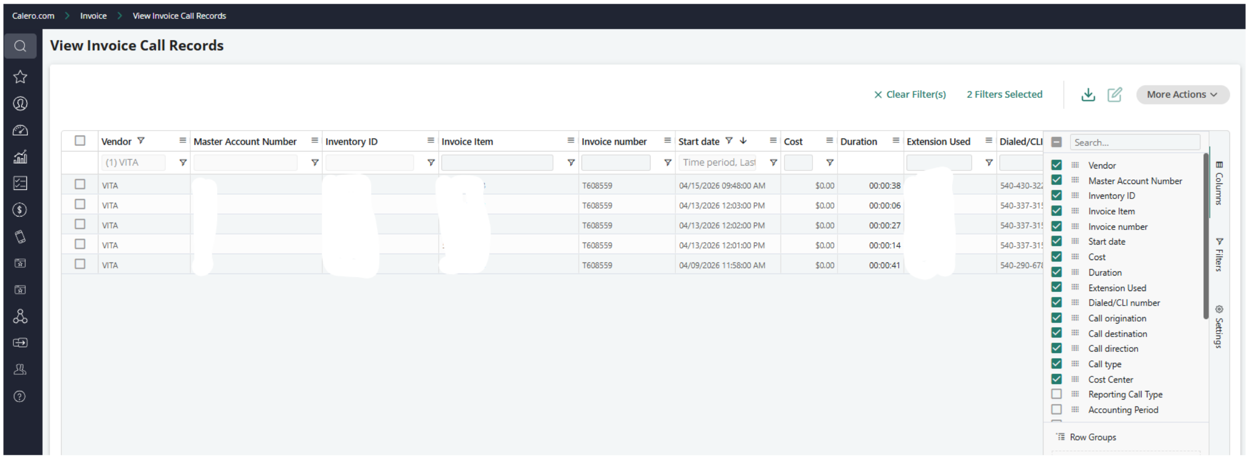


Print Invoice Voucher – provides a PDF report including the Invoice Detail page and the Allocated Charges Summary page.

Open Tickets – shows all tickets related to the Invoice.

Call Details – to review the call detail records associated with the current invoice charges.

Select "Search" to view the Invoice Call Details. By entering search criteria, you are able to narrow your records to a specific Inventory item.

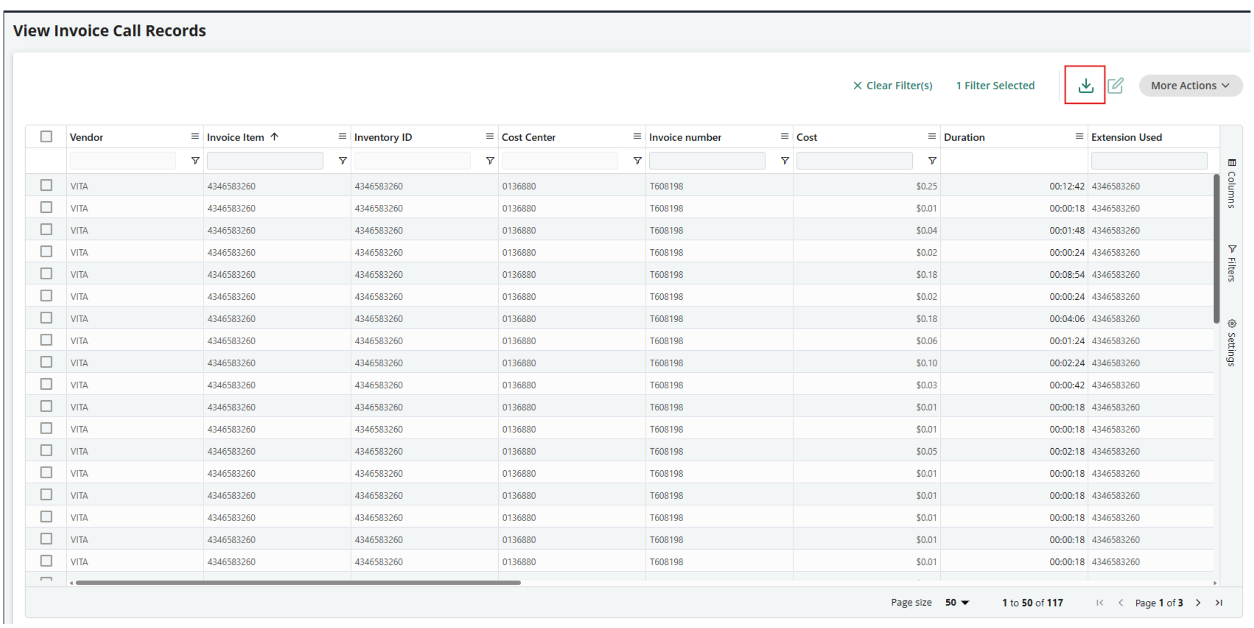


- These details can be exported by clicking the “View in Excel” icon in the upper right corner.

View Invoice Call Records

The “View Invoice Call Records” list view displays an account history of all call traffic that has been billed.

1. Go to **Invoice** > **Usage** > **View Invoice Call Records**.
2. By entering search criteria, you can narrow your records to a specific Inventory item, Start date, Call destination, etc.
    - These details can be exported by selecting the records and clicking the download icon in the upper right corner.



Review and Validation – Analytic

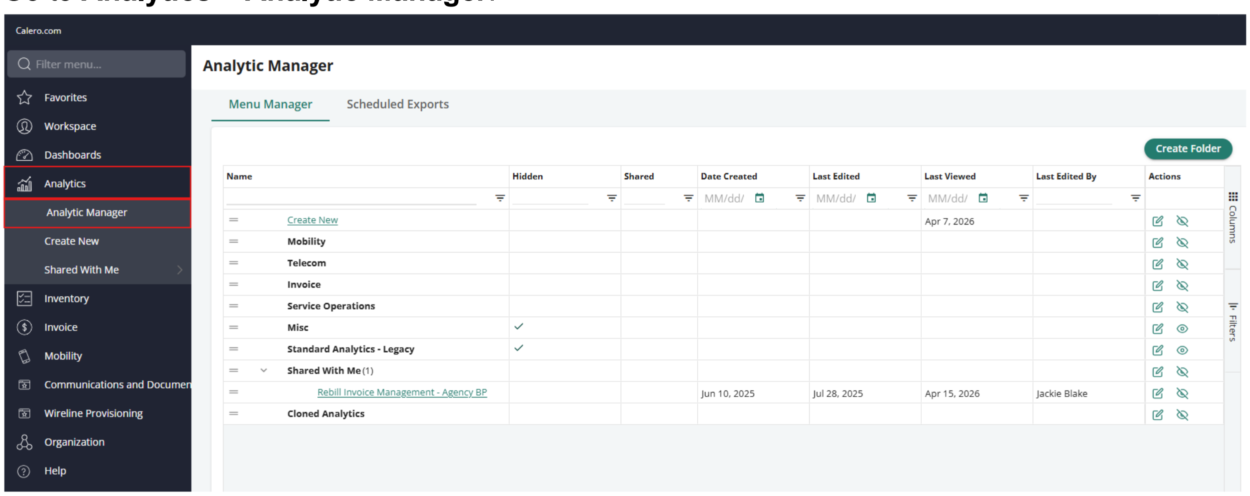
This portion of the User Guide explains how to navigate and use the Rebill Invoice Management – Agency BP analytic. There are visuals and graphs that capture various combinations of data to assist with the review and analysis of invoice charges, inventory, savings management tickets and zero usage statistics.

Common Navigation icons in the Analytic

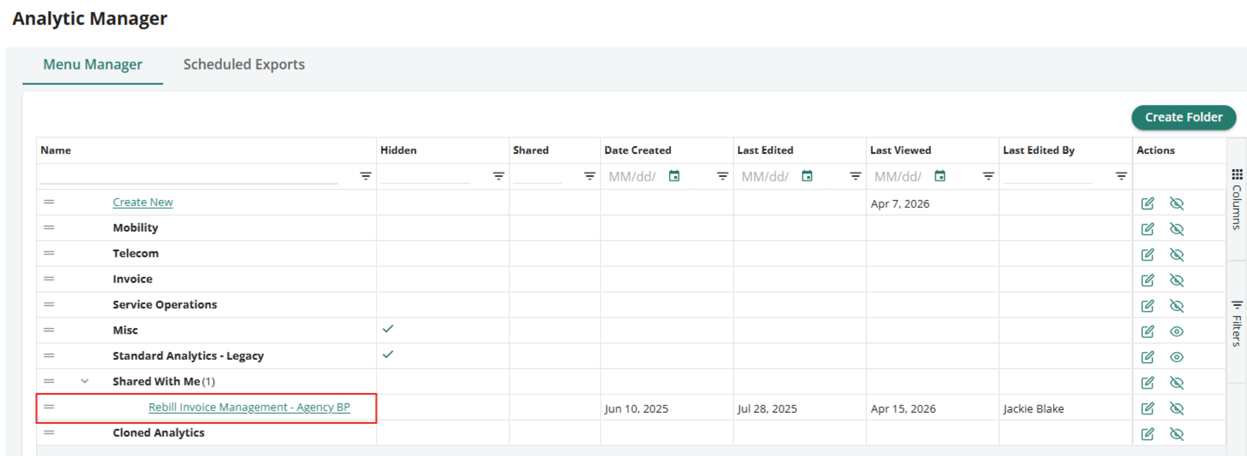
	**Home**	Takes you back to the main/home page.
	**Back**	Returns you to the last page you were on.
	**Slicer Configuration**	Also called the Settings cog; directs you to the slicer.
	**Clone Options**	Clone the Analytic to customize output.
	**Export Options**	Export Analytic to PDF or PowerPoint.
	**Reset All Filters**	Reset all filters to the defaults.

Rebill Invoice Management – Agency BP Analytic

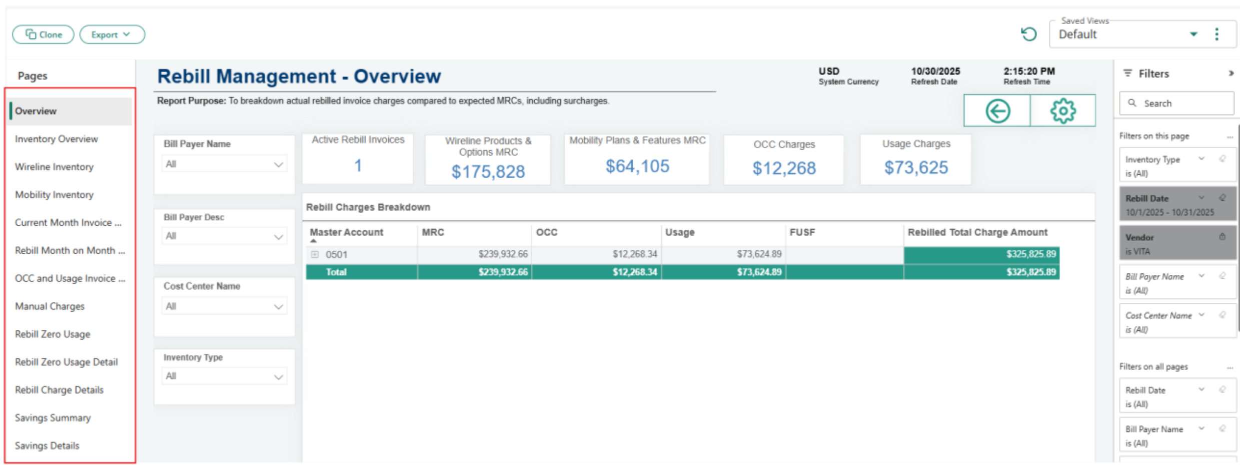
1. Go to **Analytics > Analytic Manager**.



2. Find the **Shared With Me** section and select the **<u>Rebill Invoice Management – Agency BP</u>** link.



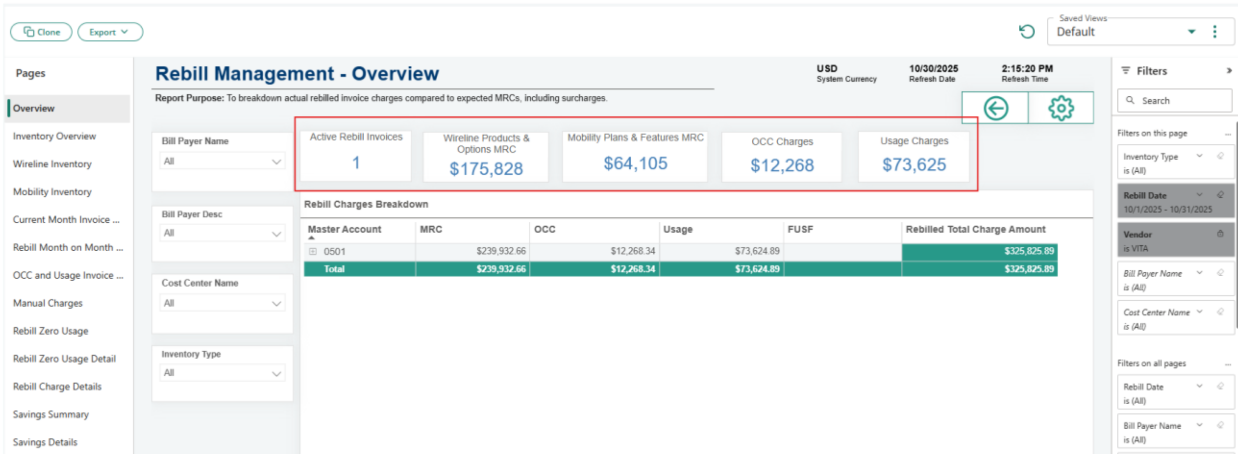
3. Navigate through the pages outlined on the left navigation panel.



- Overview
- Inventory Overview
- Wireline Inventory
- Mobility Inventory
- Current Month Invoice Charges
- Rebill Month on Month Matrix
- OCC and Usage Invoice Detail
- Manual Charges
- Rebill Zero Usage
- Rebill Zero Usage Detail

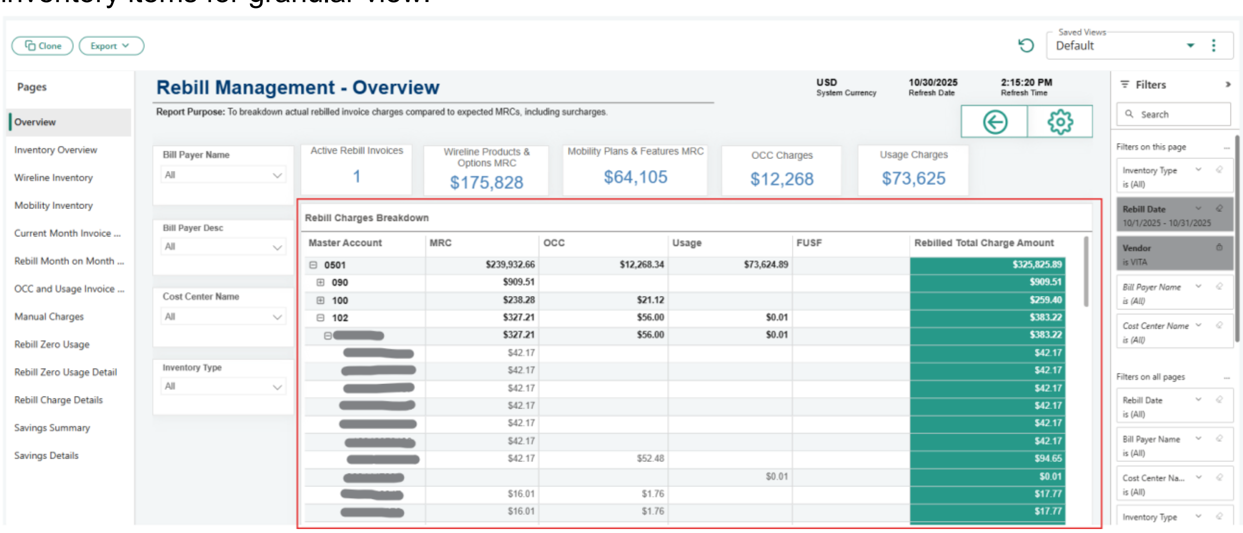
Overview

Review the KPIs in the top.



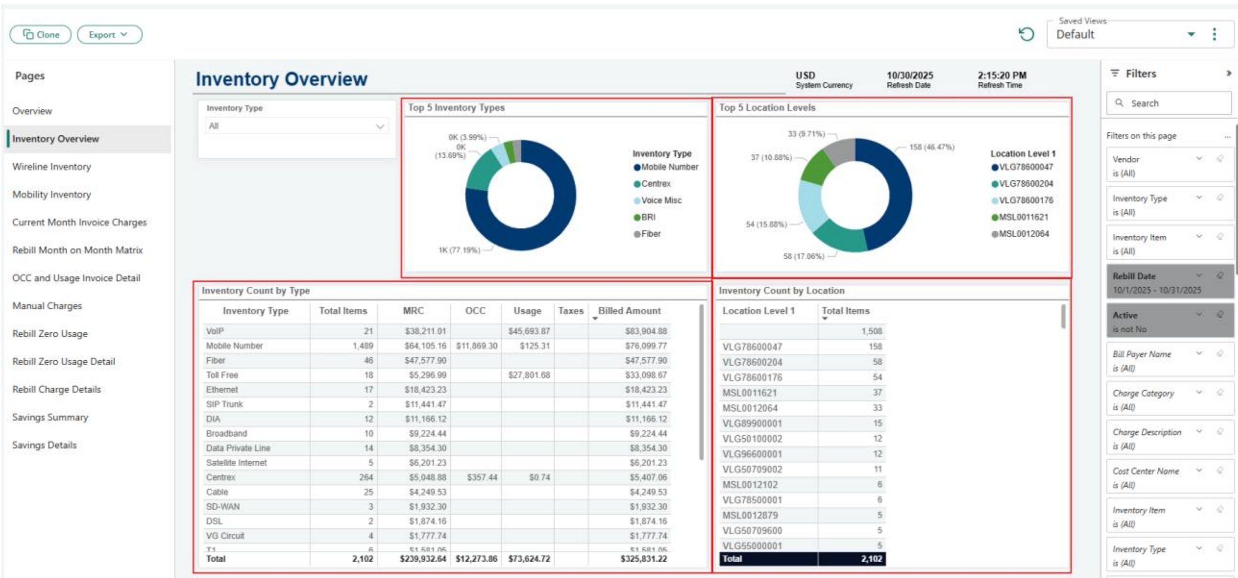
- **Active Rebill Invoices** – Shows the count of Active Rebill Invoices.
- **Wireline Products & Options MRC** – Total Product MRC charge amount associated to Inventory IDs assigned to the specific Bill Payer/Cost Center based on the Billing Contact's access and/or the Bill Payer/Cost Center filtered to.
- **Mobility Plans & Features MRC** – Total Product MRC charge amount associated to Mobile Numbers assigned to the specific Bill Payer/Cost Center based on the Billing Contact's access and/or the Bill Payer/Cost Center filtered to.
- **OCC (Other Charges and Credits) Charges** – OCC charges are associated to an inventory item with an assigned cost center that were passed to rebill from a vendor invoice. Examples of these would be install charges, outage credits, tech dispatch charges, etc.
- **Usage Charges**: Usage charges are associated to an inventory item with an assigned cost center that were passed to rebill from a vendor invoice.

Rebill Charges Breakdown – Drill down into the bill payers, cost centers, rebill invoice number, inventory items for granular view.



Inventory Overview

By default, this page is filtered by Active Inventory that has appeared on a Rebill Invoice within the current month. Use the filters to modify Rebill Invoice date range. In addition to the Inventory Type filter, there are four visuals outlined on this page.



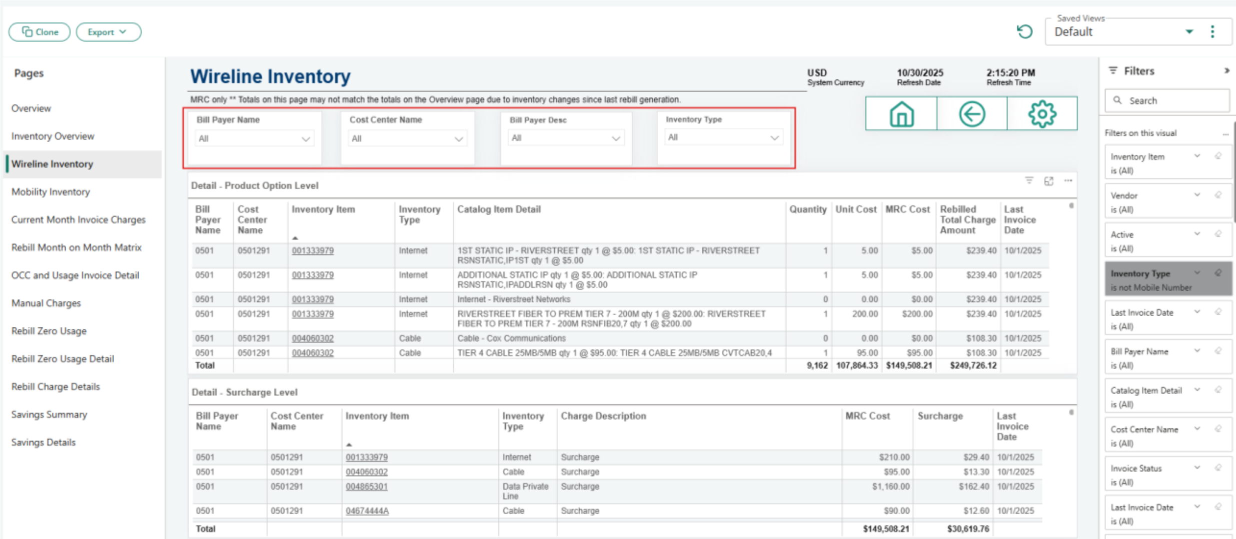
- **Top 5 Inventory Types** – Outlines top 5 inventory types based on Total Billed Amount.
- **Top 5 Location Levels** – Shows top 5 Locations based on Inventory Count.
- **Inventory Count by Type** – Provides a breakdown of Inventory Count by Type along with spend by Charge Category and Total Billed Amount.
- **Inventory Count by Location** – Similar to the Top 5 Location Level without the top 5 filter. Shows a count of Inventory Items by Location ID.

Wireline Inventory

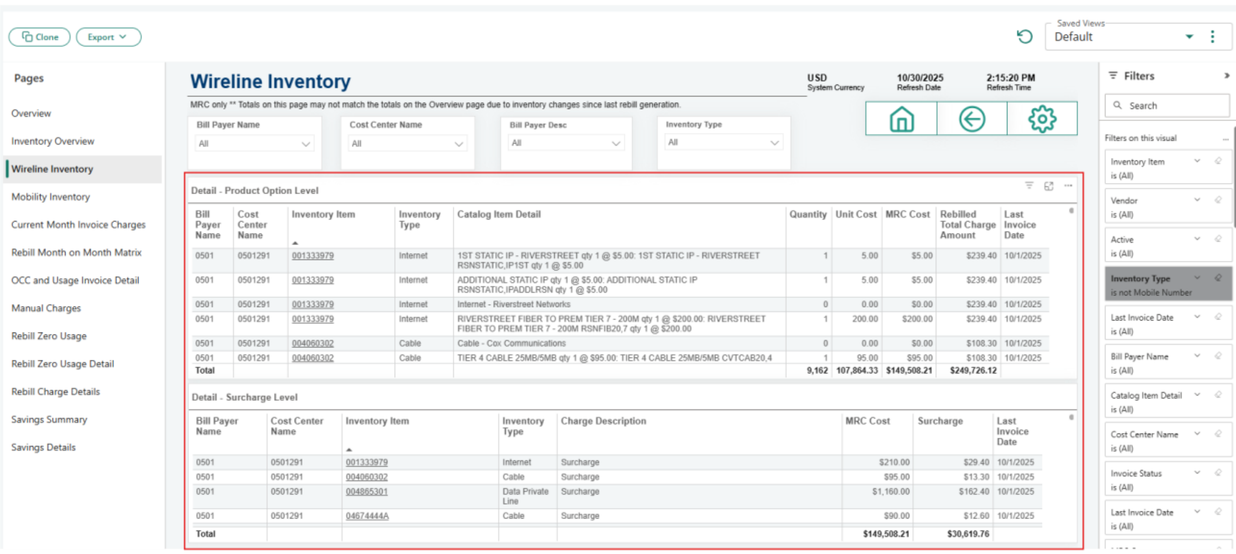
*MRC only ** Totals on this page may not match the totals on the Overview page due to inventory changes since the last rebill generation. The Overview tab shows the actual rebilled invoice charges based on product options/plans/features assigned at the time the most recent rebill was generated; while the Wireline Inventory and Mobility Inventory tab shows the MRC cost based on the product options/plans/features assigned currently.*

Use the filter options at the top.

- Bill Payer Name
- Cost Center Name
- Bill Payer Description
- Inventory Type



Below the filter options, there are two tables.



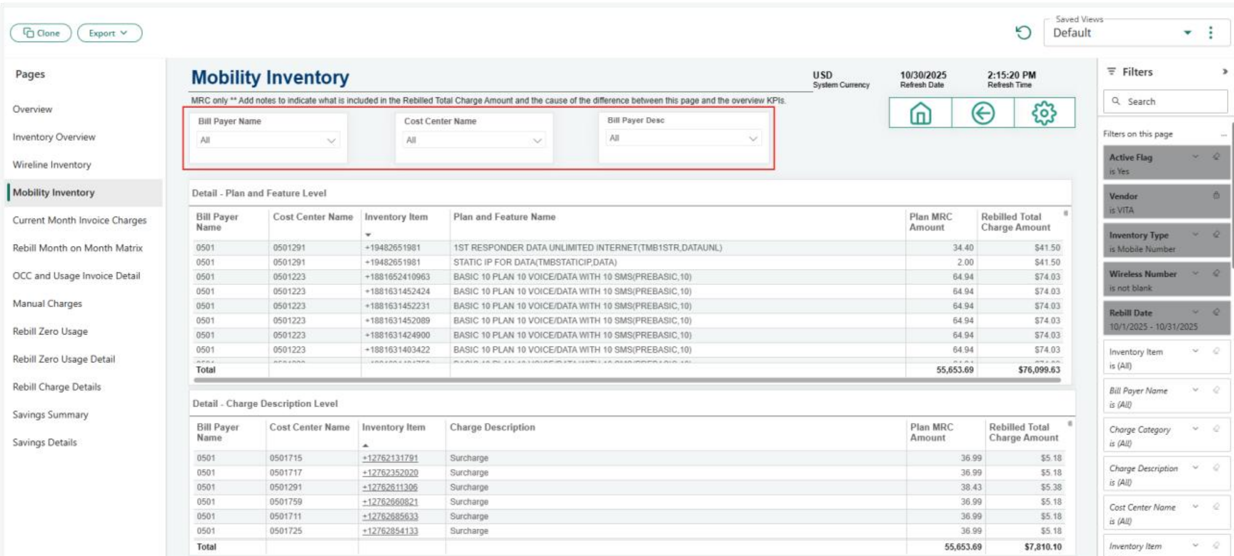
- **Detail – Product Option Level** – The top table shows Inventory charge details at the Product Option level. You will also see the quantity of items, the unit cost for each\ and the maximum MRC cost associated with those charges, giving you a comprehensive understanding of spending in each Inventory and Product Option.
- **Detail – Surcharge Level** – The bottom table is filtered to show Inventory charge details for surcharges only.

Mobility Inventory

*MRC only **Totals on this page may not match the totals on the Overview page due to inventory changes since last rebill generation. The Overview tab shows the actual rebilled invoice charges based on product options/plans/features assigned at the time the most recent rebill was generated; while the Wireline Inventory and Mobility Inventory tab shows the MRC cost based on the product options/plans/features assigned currently.*

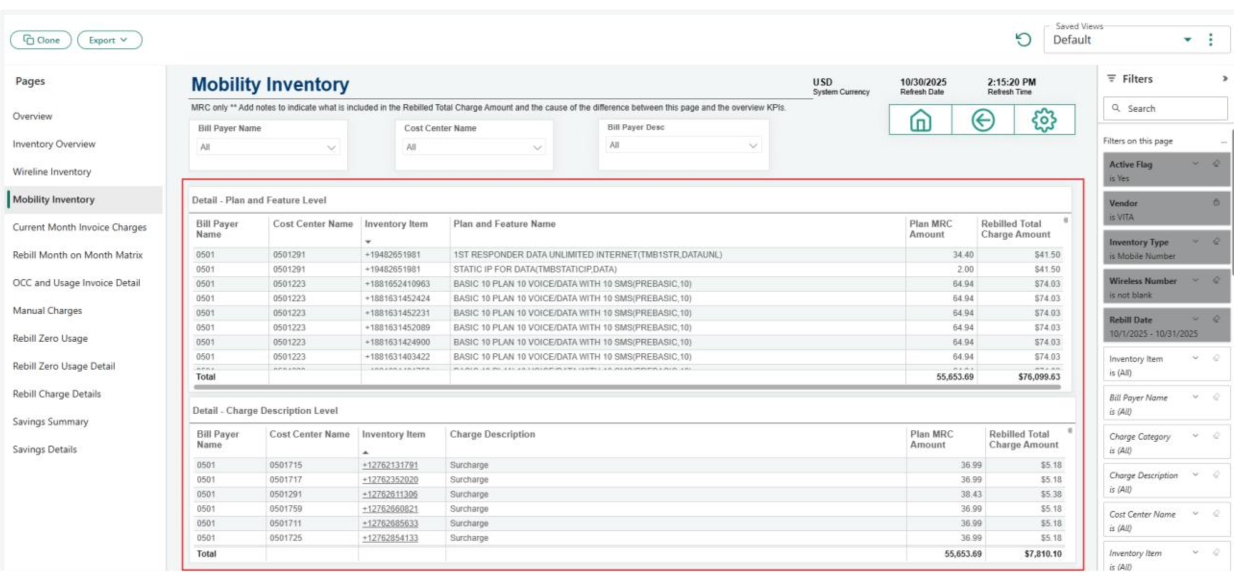
This page provides a breakdown of mobility costs at the mobile inventory level associated to a specific Bill Payer Name and/or Cost Center Name.

Use the filter options at the top.



- Bill Payer Name
- Cost Center Name
- Bill Payer Description

Below the filter options, there are two tables.

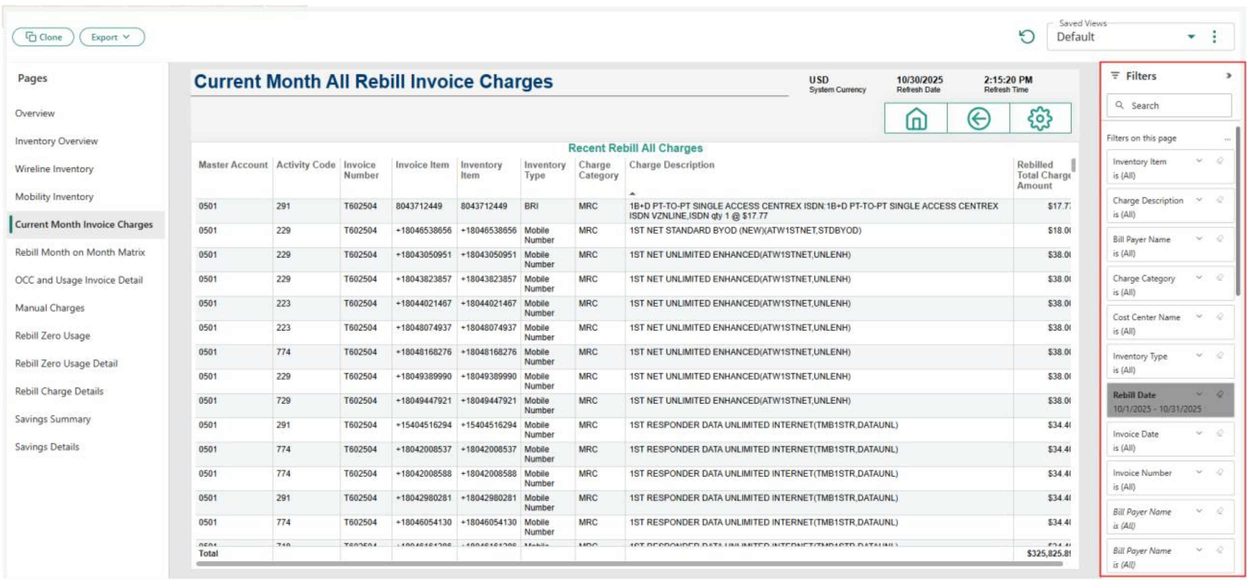


- **Detail – Plan and Feature Level** – The top table outlines mobility inventory charge details at the Plan and Feature level.
- **Detail – Charge Description Level** – The bottom table shows the same information for surcharges only.

Current Month Invoice Charges

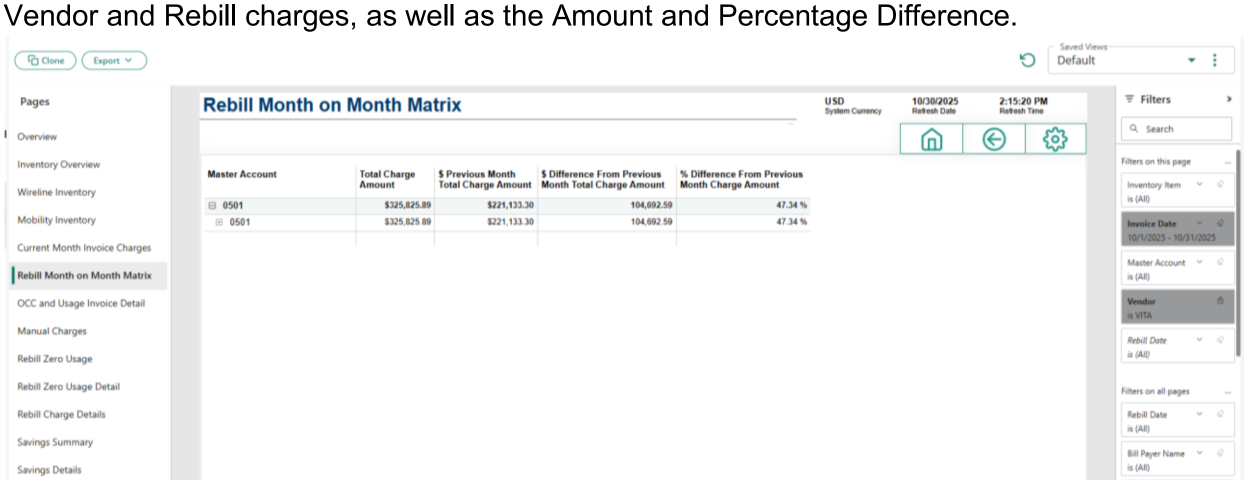
This page outlines all current month invoice charges, including Bill Payer Name, Cost Center Name, Invoice Number, Invoice Item, Inventory Type, Charge Category, Charge Description and Total Rebilled Charge Amount.

Although there are not specific filter options at the top similar to other pages, you still can apply filters using the Filters column on the far right.

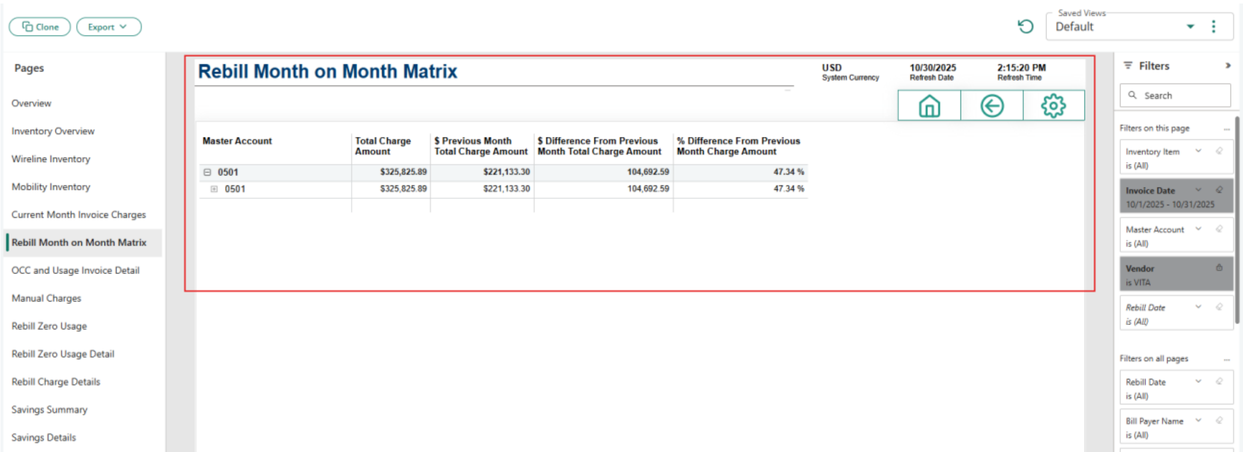


Rebill Month on Month Matrix

Similar to what you would see on the Rebill Invoice Management Analytic, this page shows a matrix outlining month over month what a specific Bill Payer and/or Cost Center has billed in Vendor and Rebill charges, as well as the Amount and Percentage Difference.



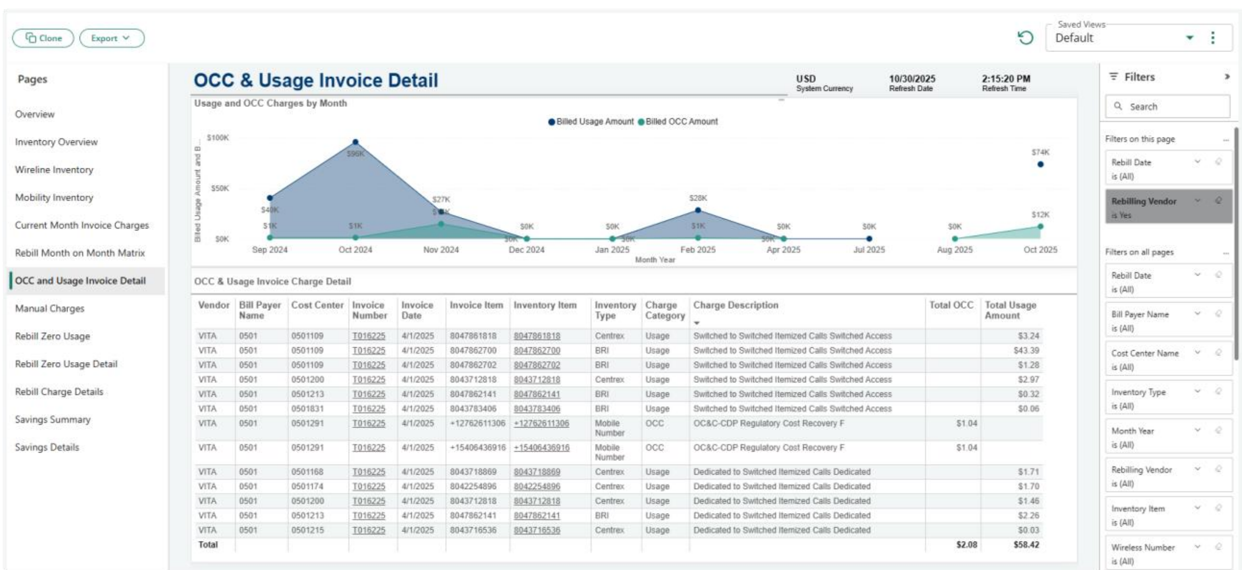
The **Bill Payer Name** column of the matrix is expandable to show Cost Center Name, Inventory Item and Charge Description details.



OCC and Usage Invoice Detail

This page will show all OCC (other charges and credits; for example – install charges, manual adjustments, tech dispatch and/or outage credits) and Usage charges that have occurred within the previous calendar month.

The visual at the top shows a 12-month trend of Usage and OCC charges.



In addition to the OCC and Usage Invoice Detail page, the VITA Agency Team has some other options to review usage-related information.

Invoice Charges: Analyze charges per invoice with a focus on usage.

1. Go to **Invoice > Charges > Invoice Charges.** This view is all invoice charge details. It's a consolidation of the Invoice Charges tab of all invoices.
2. Apply filters based on the specific Charge Category of Usage, Vendor, Master Account, Invoice Item, Inventory ID, Invoice Number, etc. you would like to review.
3. Review search results.
    - You can apply row groups or export the data to assist with the review process.

  - The search results are usually summarized rather than kept in a call-by-call record.
  - If you would like to review call-by-call records, please follow the steps outlined in the Invoice Call Records option.

Invoice Call Records: Review detailed call records from invoices (both mobility and wireline).

1. Go to **Invoice > Usage > View Invoice Call Records**.
2. Apply filters based on a specific Master Account, Invoice Item, Inventory ID, Invoice Number, etc. you would like to review.
    - Keep in mind that the default Start date filter of last 1 month is in place, so if you would like to review older data, you will need to adjust the filter.
    - Also, VITA will be the only vendor with wireline call detail associated with it, so if you select another vendor, the search results will be blank.
3. Review search results.
    - You can apply row groups or export the data if that will assist with the review process.

Mobility Usage: Assess usage data for mobility services.

1. Go to **Mobility > Usage > Mobile Usage**.
    - This page will show how mobile features (data, voice, messaging) are being used against the account or items allowance.
    - As always, you can apply filters, row groups or export the data.
2. Go to **Mobility > Usage > Mobile Usage Detail**.
    - This page shows usage details, per call, message, or data consumption.
3. Apply filters based on the specific Usage type, Mobile Number, Personnel or Start data.
    - You can export your search results, but you will not have the ability to apply row groups as you can in Mobile Usage.

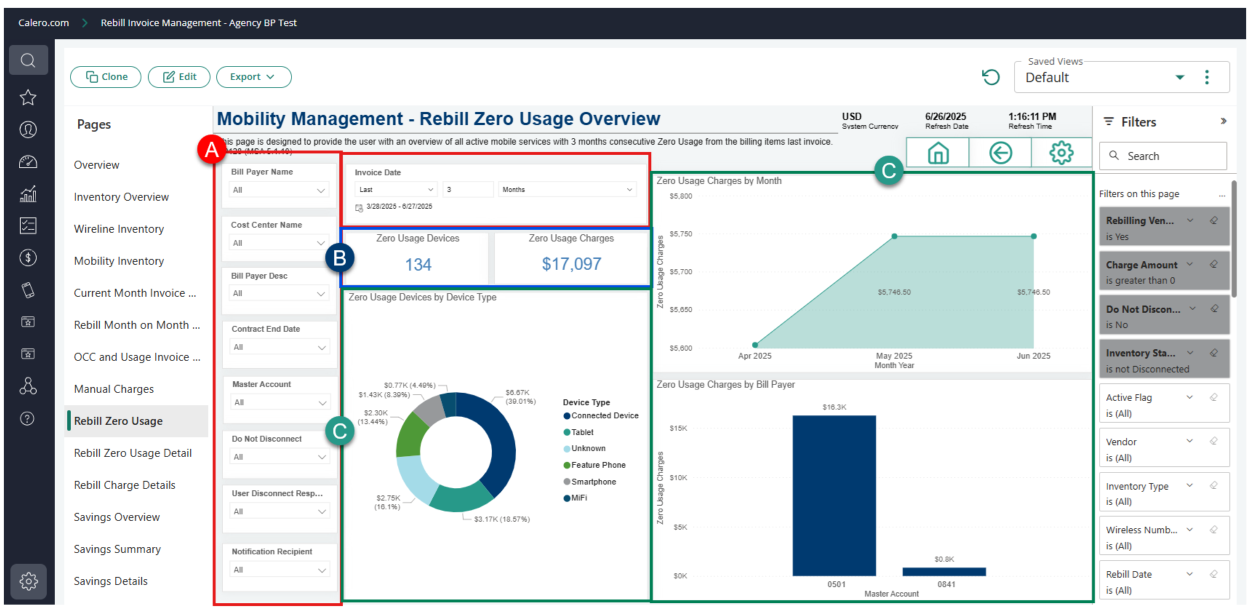
Manual Charges

Occasionally there will be a reason to adjust a rebill invoice. For example, prorated charges related to recent change work orders or verified dispute credits. Depending on the cause for the adjustment or adjustment type, there is a specific process the agency team can follow to review and validate the charges.

Filters default to show manual adjustments applied to vendor invoices that were considered for rebill in the current month rebill cycle.

Rebill Zero Usage

This page provides an overview of all active mobile services with three consecutive months of Zero Usage.



There are multiple filters available in the first column.

A.) KPIs

KPIs include:

- Zero Usage Device Count
- Zero Usage Charge Total

B.) Visuals

Visual Summary info sections include:

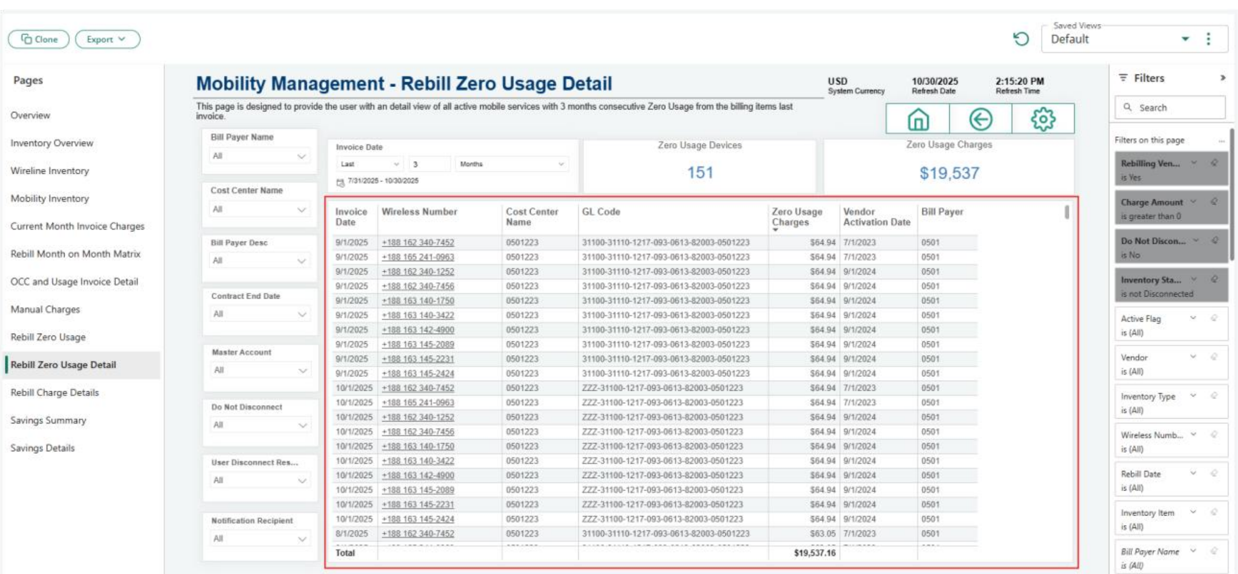
- **Zero Usage Devices by Device Type** - graphical representation of total charges associated with zero usage devices, broken out by device type.
- **Zero Usage Charge by Month** - graphical representation of total charges associated with zero usage devices per month.
- **Total Invoice Charges by Bill Payer** - graphical representation of total charges associated with zero usage devices, broken out by Bill Payer.

C.) Filters

Use available filters to change the results based on Bill Payer Name, Cost Center Name, Bill Payer Description, Contract End Date, Master Account, Do Not Disconnect (devices marked as such), User Disconnect Response and Notification Recipient.

Rebill Zero Usage Detail

In addition to the same filters and KPIs as the Rebill Zero Usage page, the Rebill Zero Usage Detail page provides an MRC charge breakout by Mobile Number and GL Code. A hyperlink field indicates that deep linking has been enabled. Clicking on the field will allow users to select the wireless number and navigate to the Mobile Number Inventory page.

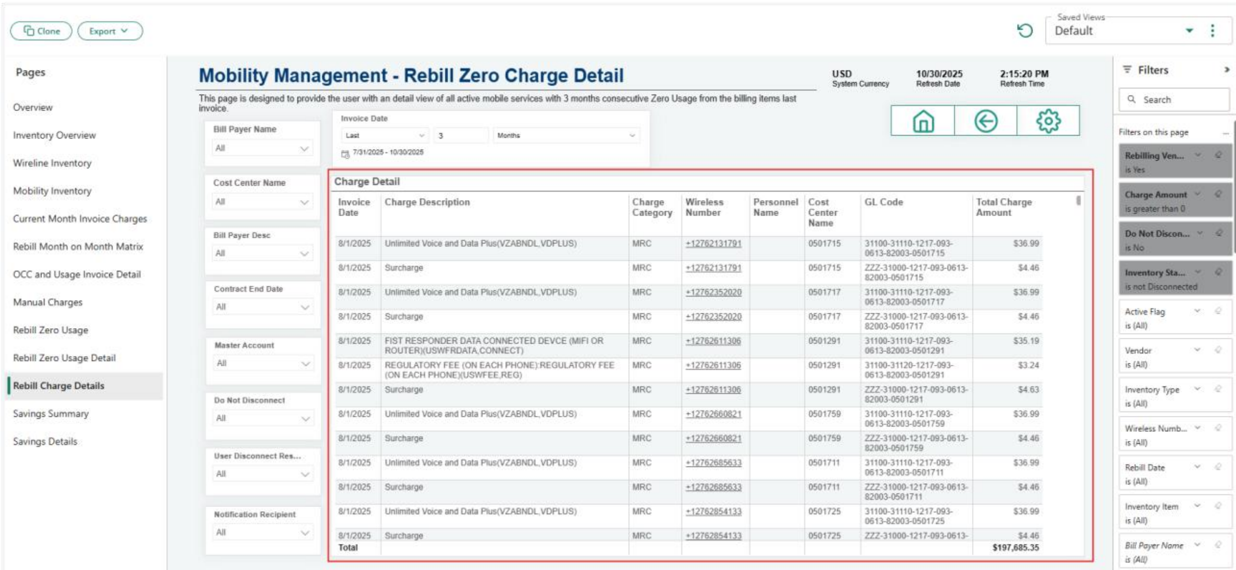


Rebill Charge Details

This page is designed to provide the user with a complete charge detail view of all active mobile services with three consecutive months Zero Usage from the billing items last invoice.

The Charge Detail visual provides a Total Charge Amount breakout by Invoice Date, Charge Description, Charge Category, Wireless Number, Personnel Name, Cost Center Name and GL

Code. Deep linking capabilities allow users to select the wireless number and navigate to the Mobile Number Inventory page.



Communication Tickets

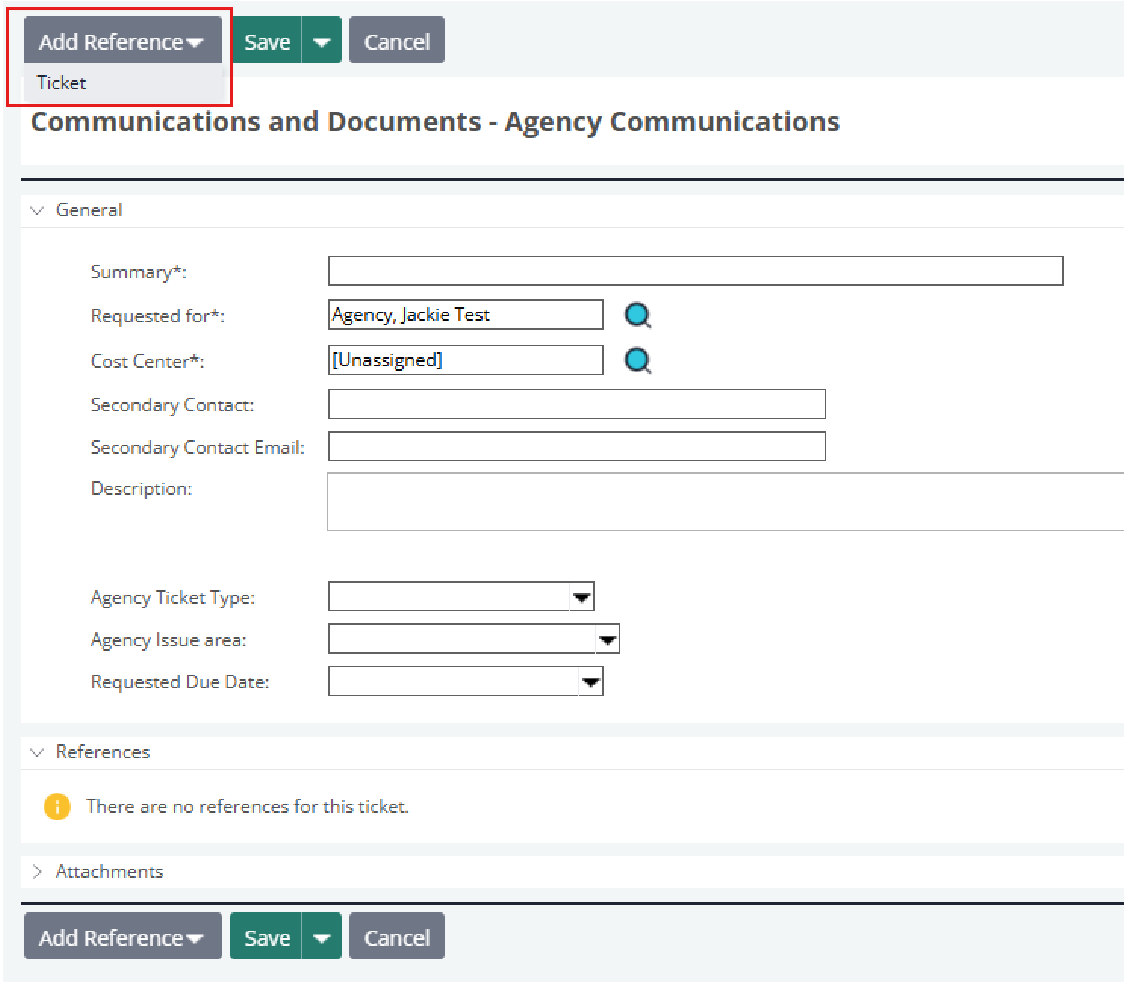
Communication tickets are intended for communication with Calero about updates or inquiries that are not directly related to a specific invoice or charge. Each communication ticket is configured for specific cost centers and security groups. A user's assigned cost center will determine if that user has access to view and/or edit communication tickets.

1. Go to **Communications and Documents** > **Work Queues** > **Agency Communications Tickets.**
2. This list view displays all communication tickets that have been created. You can view and search for tickets by their ticket numbers, ticket status, assigned cost center, etc.
3. Select a **Ticket Number** to view the corresponding ticket details and updates.

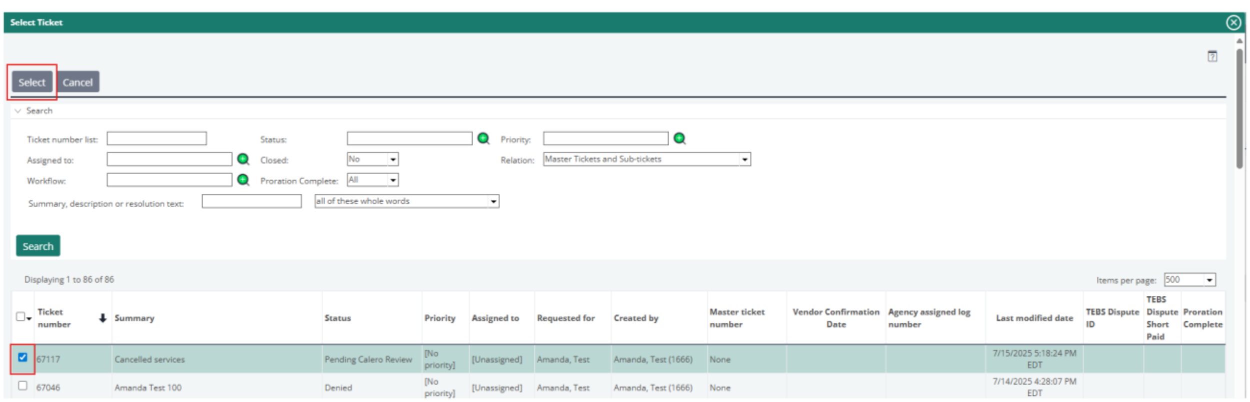
Create New Ticket

1. Go to **Communications and Documents** > **Work Queues** > **Agency Communications Tickets.**
    - Alternatively, you can go to **Communications and Documents** > **Work Queues** > **New** > **Agency Communications Tickets.**
2. Select the **Add Ticket** icon in the upper right corner and complete the following fields:
    - **Summary (Required)**: A brief description of the inquiry.
    - **Requested for (Required)**: The person the ticket is being requested for.
    - **Assigned to (Required)**: This will be assigned internally by Calero. The field will default to unassigned when initially being created.
    - **Cost Center (Required)**: This aligns with the person or agency associated with the submission of the request.
    - **Secondary Contact**: A secondary contact may be added to the ticket.

- **Secondary Contact Email**: The secondary contact's email address may be added to the ticket.
- **Description**: A detailed description of the inquiry.
- **Agency Ticket Type**:
    - General Inquiry
    - How To
    - Rebill
    - Reporting
- **Agency Issue Area**:
    - General Inquiry
    - Monthly Rebill
    - Reporting
    - Wireless Ordering
    - Wireline Ordering
- **Resolution Type:** This will be assigned internally by Calero.
- **Requested Due Date**: Agencies may enter a date here to signify the requested due date.
- **References**: A reference to an existing ticket (open or closed) if applicable.
    i. Click on the **Add Reference** button on the top-right corner of the Add Ticket page.
    ii. Select **Ticket**

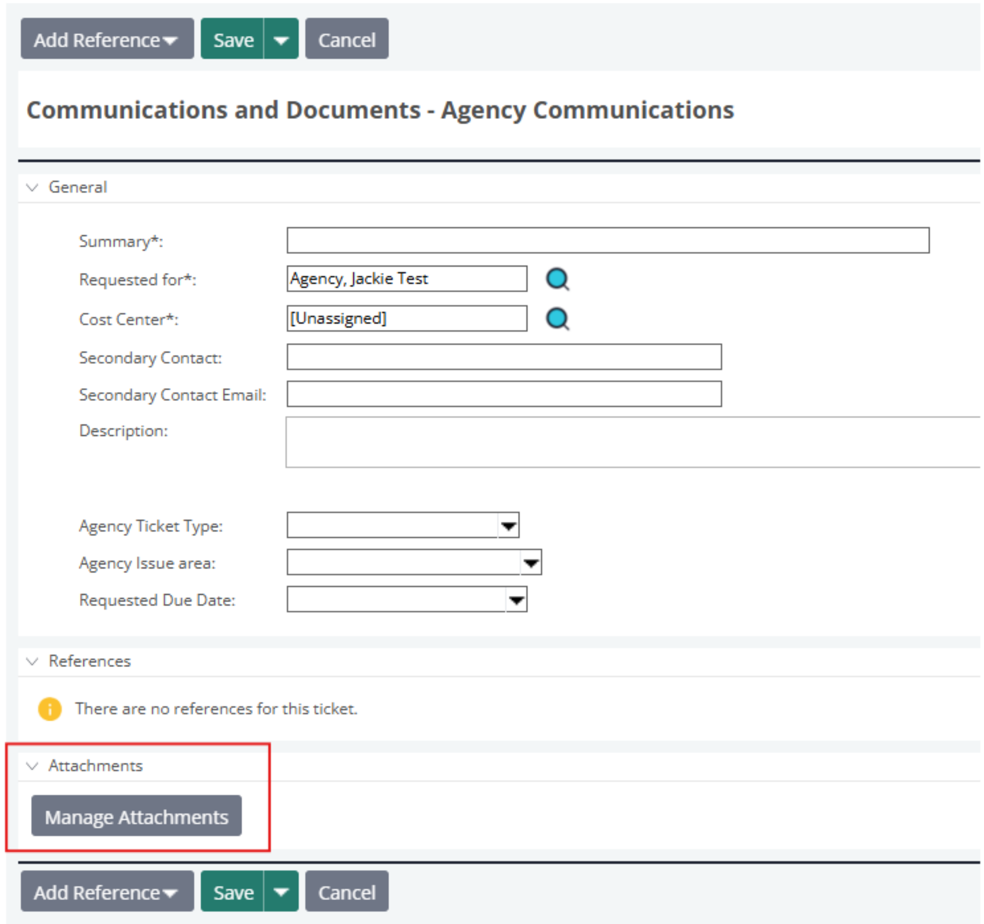


iii. Using the filter options, select the ticket you would like to reference, and click Select



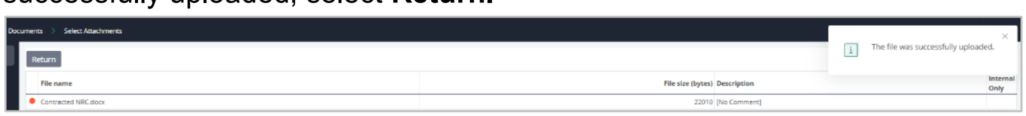
- **Attachments**: Supporting documentation, contracts, forms, etc.
    i. Click on the **Attachments** row to expand the section.

ii. Select **Manage Attachments.**



iii. Select the file you want to attach to the ticket and select **Upload File.**

iv. Once the message box appears indicating the attachment(s) is successfully uploaded, select **Return.**



3. Save your changes.
   i. The final step is to Save and Submit the ticket. Please note that once a ticket is submitted, it becomes non-editable. If you forget to attach a document or add any additional notes to the description, you won't be able to make changes after submission.
   ii. Once you've ensured all required fields in the ticket are completed, you're ready to submit. Select the dropdown next to **Save** and select **Save and Go to Detail.**
   iii. A message box will appear indicating the ticket number and that it has been successfully added.

Agency Disputes

This section will outline the process for raising a dispute that relates to an invoice charge and how to edit, review and monitor dispute tickets through resolution.

The Calero Operations team will take responsibility for researching, auditing and guiding the dispute toward resolution. This includes communications with the agencies where their dispute amount is not agreed upon by Calero or the Vendor.

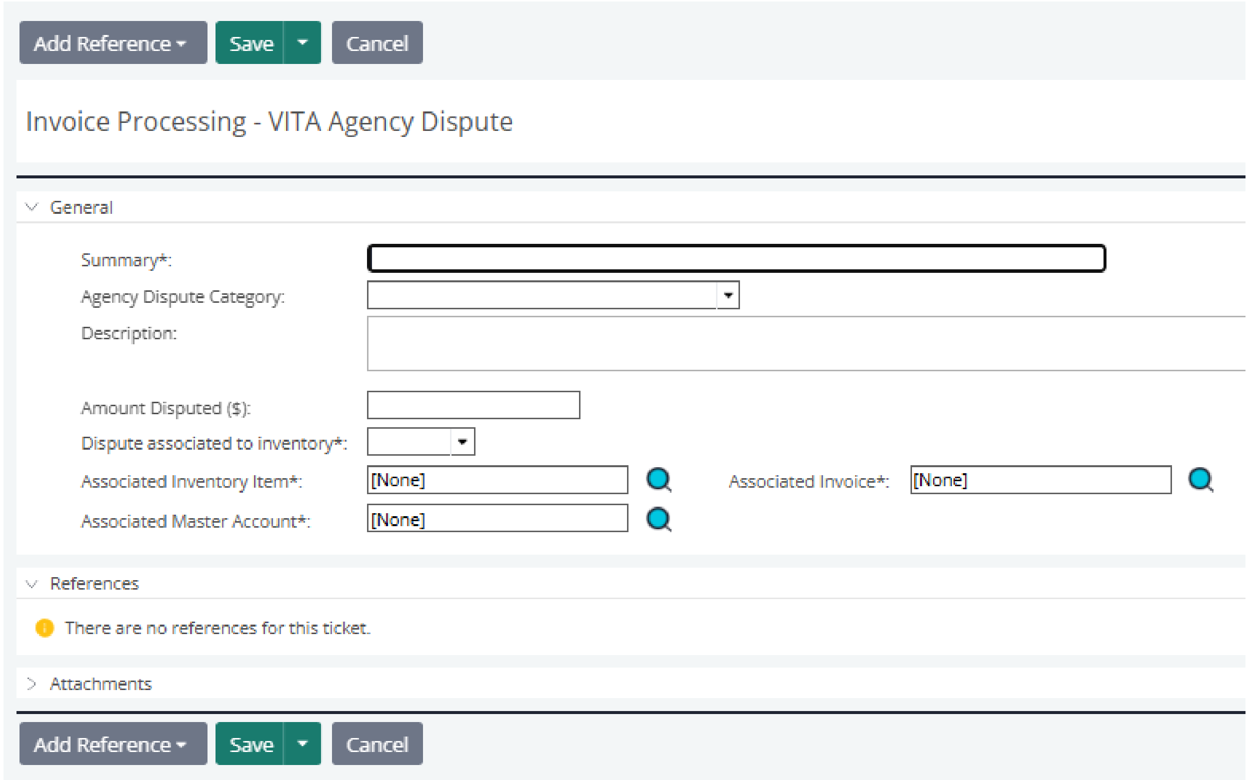
Dispute Creation

A dispute ticket can be initiated by accessing the VITA Agency Dispute Tickets list view. Opening a ticket from this list view creates a dispute ticket that pertains to a specific invoice charge and inventory item. If there are multiple charges or Inventory items that need to be disputed, you will need to repeat these steps for each disputed item.

VITA Agency Dispute Tickets – List view

1. Go to **Invoice > Work Queues > VITA Agency Dispute Tickets.**
    - Alternatively, you can go to **Invoice > Work Queues > New > VITA Agency Dispute.**
2. In the top-right corner of the list view, select **Add Ticket**.

3. A dispute ticket template will appear.



4. Complete the following fields:
   - **Summary**: A summary of the disputed item
   - **Agency Dispute Category**: Select applicable category
     - Disconnects Still Billing
     - Double Billing
     - Incorrect Amount Charged
     - Invalid Item Charge
     - Missing Credit
     - Other
     - Surcharge Error
   - **Description**: To add additional comments, click into the text box and a date and time stamp will appear next to your name. Enter comments below this text.
   - **Amount Disputed ($)**: This represents the total sum of charges identified as being disputable. Total discrepancy amount. [Required field for tickets with Claim Type of Dispute; not required for optimization or inquiry Claim Type tickets.]
   - **Dispute Associated to Inventory**: Select Yes or No.
   - **Associated Inventory Item**: Inventory Item associated with the dispute. For multiple Inventory Items, please raise separate dispute tickets.
   - **Associated Invoice**: Invoice Number associated with the dispute.
   - **Associated Master Account**: Master Account Number associated with the dispute.
   - **Attachments**: Supporting documentation, emails, contracts, forms, etc.
5. Select **Save** for ticket generation.

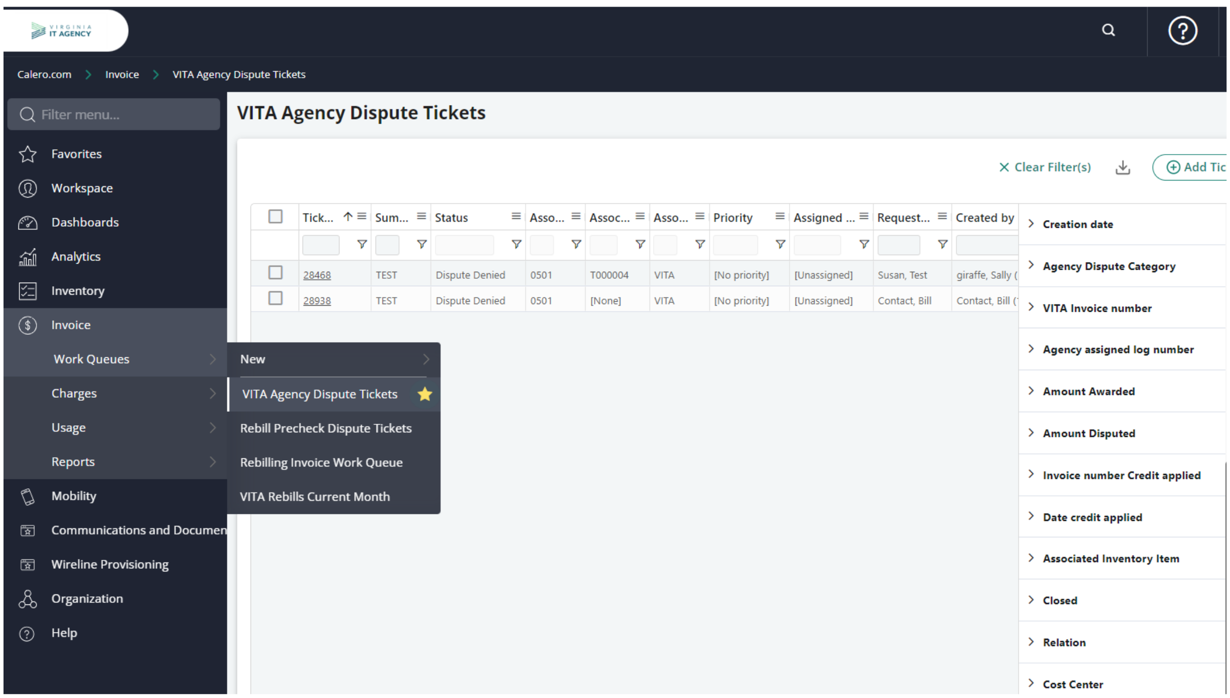
Dispute Tracking and Management

Agency users can view and update dispute tickets in the **VITA Agency Dispute Tickets** list view. As a dispute ticket moves through its workflow, there are two steps (or statuses) that VITA Agency users are responsible for. The full workflow is explained in the **Agency Dispute Standard Operating Procedures** section below.

This part of the user guide focuses on the specific steps that **VITA Agency users** need to complete.

VITA Agency Dispute Tickets – List View

1. Go to **Invoice > Work Queues > VITA Agency Dispute Tickets.**

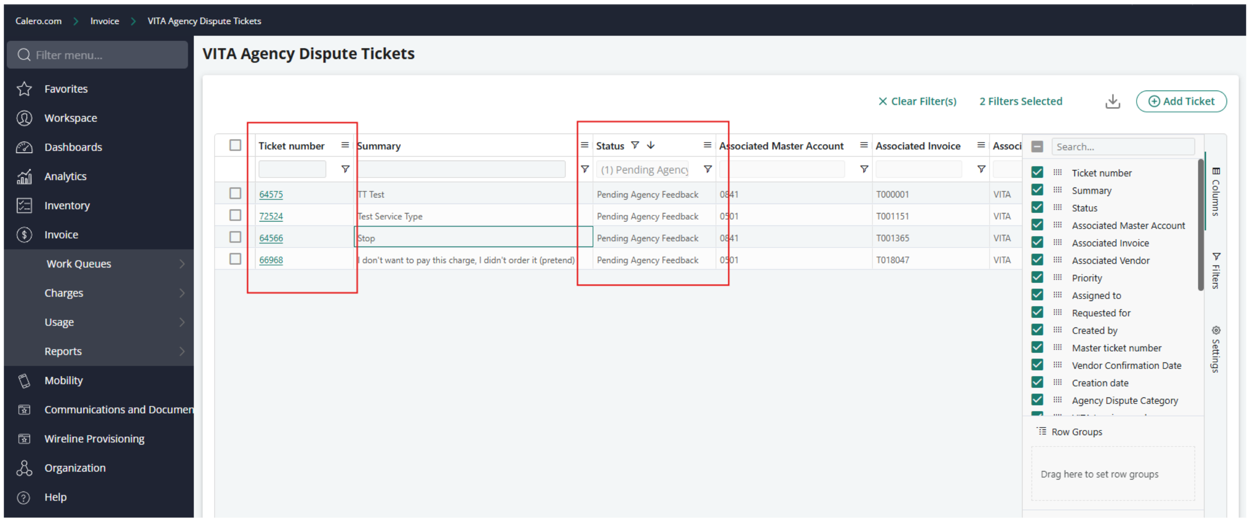


2. Select a **Ticket Number** to view the corresponding ticket details and updates.
3. Once a ticket is submitted, additional fields will appear on the dispute ticket form. Some of these auto-populate, others will be populated by the Calero Audit Team.
   - **Requested for**: Auto-populated with the username of the person who initially submitted the ticket.
   - **Creation Date:** Auto-populated with the date the dispute ticket is created.
   - **Amount Awarded ($)**: Total amount approved and applied based on dispute ticket resolution. If the dispute ticket is denied, this field will not be populated.
   - **Invoice Number Credit Applied**: The invoice number that the approved credit amount has been applied to.
   - **Date Credit Applied**: The date the approved credit was applied to the account in question.

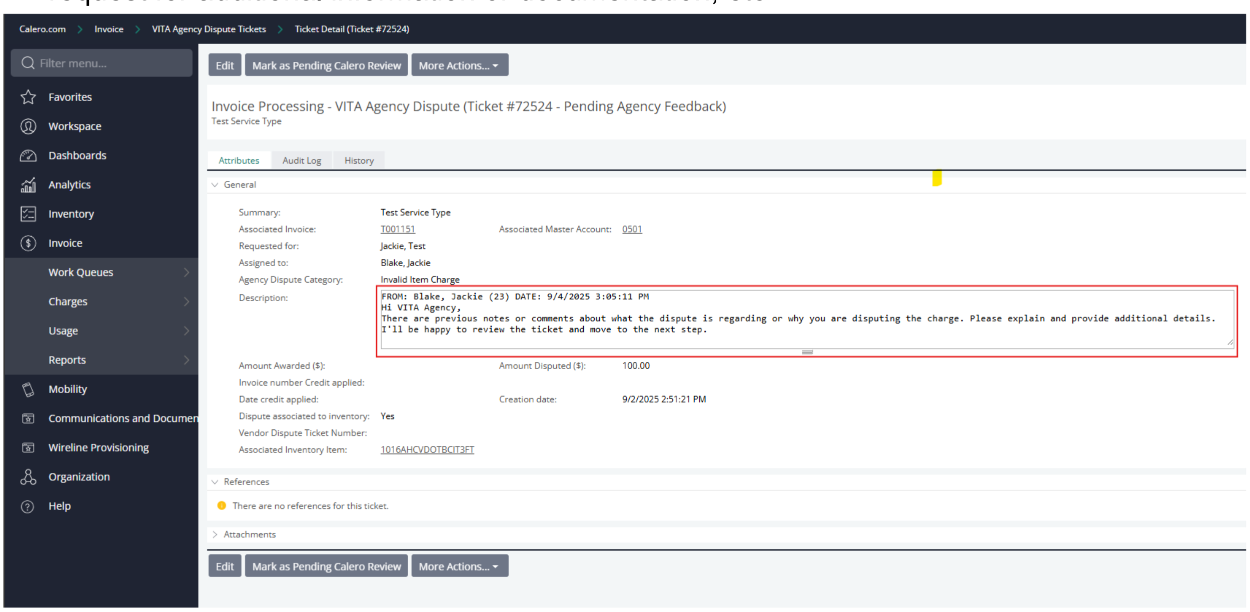
Pending Agency Feedback

This status is used for dispute tickets that need additional information from the VITA Agency prior to moving forward in the workflow. The Agency will review the ticket notes and provide feedback.

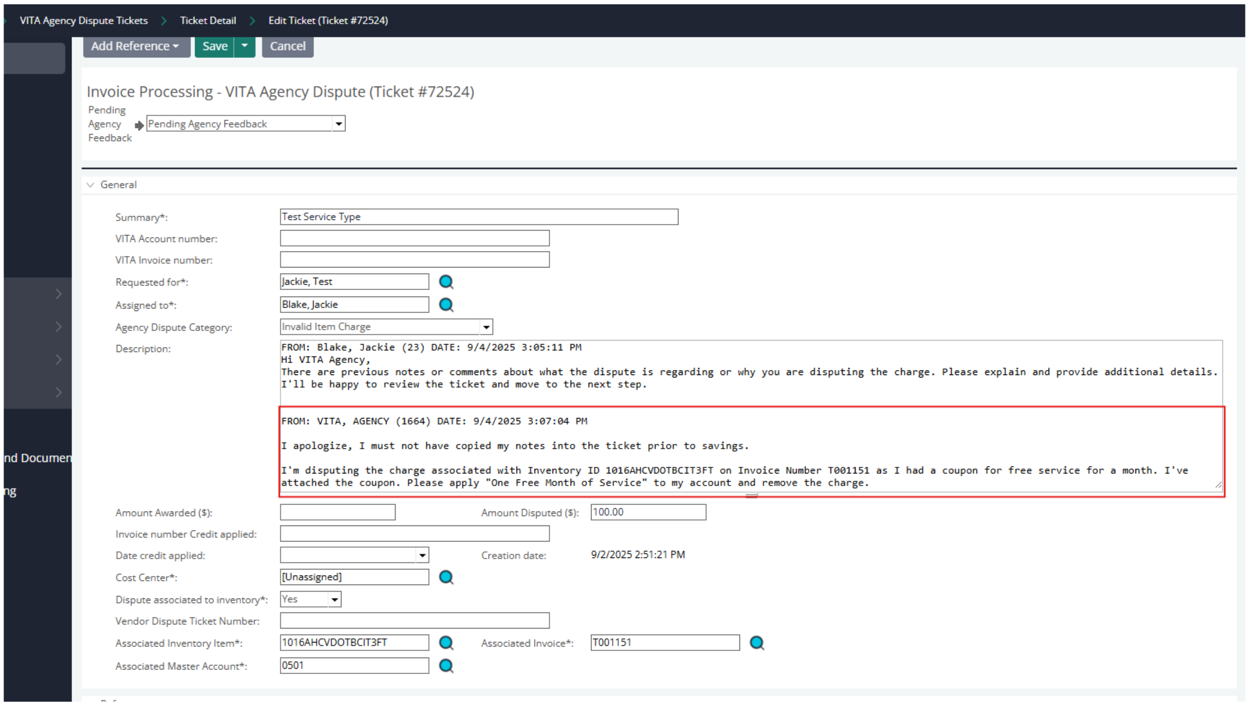
1. Navigate to the VITA Agency Dispute Tickets list view as outlined above. Filter ticket status to Pending Agency Feedback or you can filter by a specific ticket number if you have one.



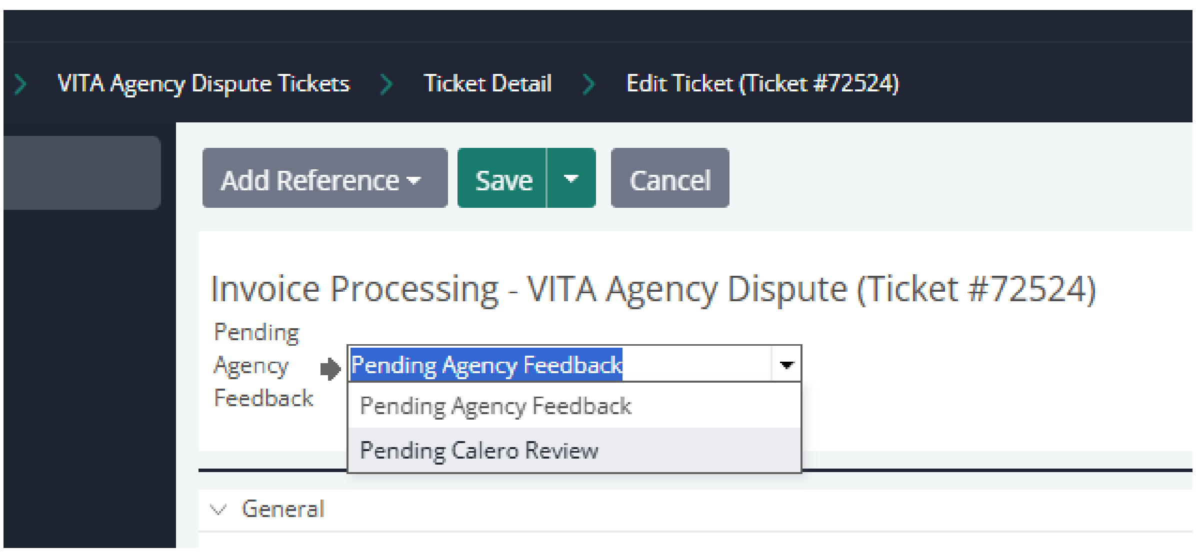
2. Edit the ticket and review ticket notes. There may be a question about the dispute ticket, request for additional information or documentation, etc.



3. You can provide details, answer questions in the notes field and/or attach additional documentation under attachments.



4. Once the ticket is updated, the Agency should select **Pending Calero Review** in the status dropdown and select **Save.** The ticket will navigate back to the Pending Calero Review status to continue through the workflow.



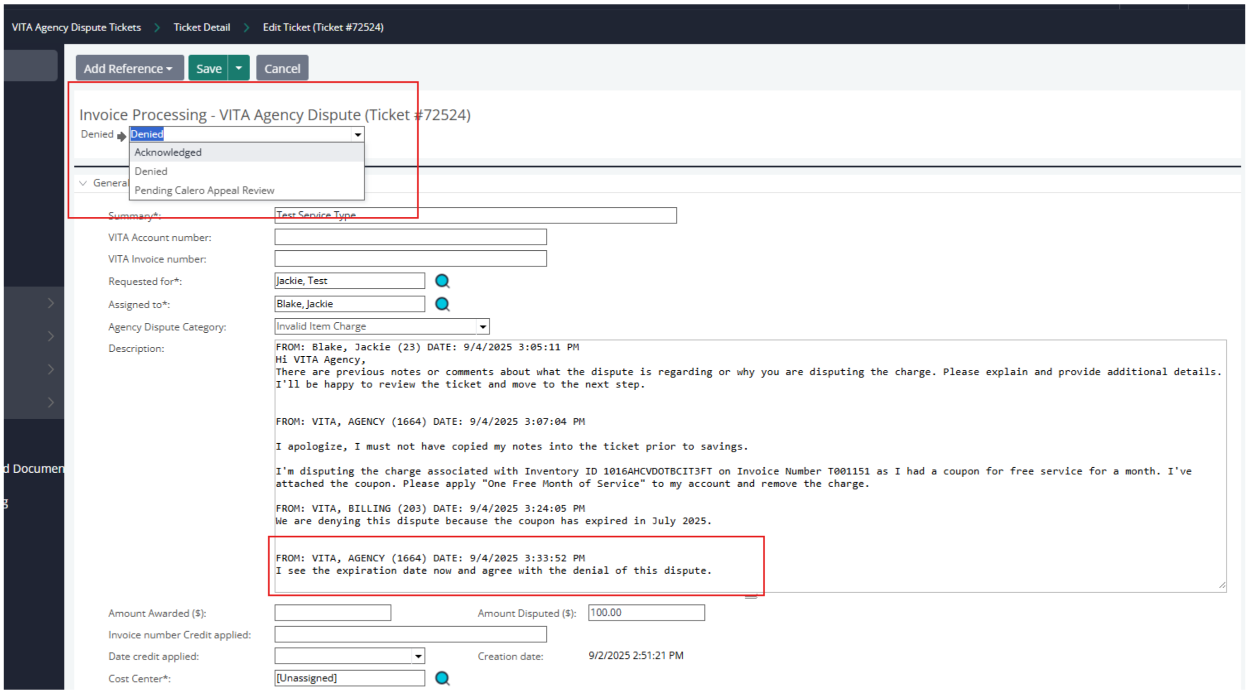
Denied

This status is used for dispute tickets that have been denied by the VITA Billing Team. The VITA agency will review the ticket notes, documents and denial reasoning, and determine if they agree or disagree with the findings.

1. Edit the ticket in question.
   2. If the Agency agrees with the denial reason:

a. Select **Acknowledged** in the status dropdown

b. Select **Save**.

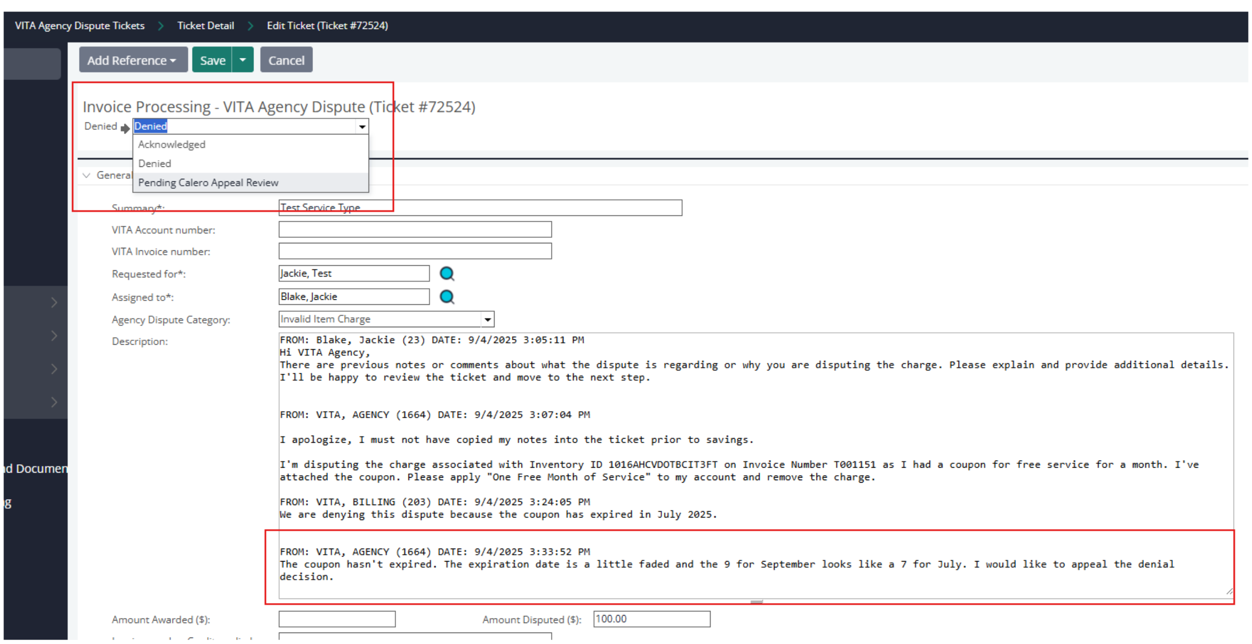


3. If the Agency disagrees with the denial reason:

a. Update notes regarding reason for disagreeing with the denial findings.

b. Select **Pending Calero Appeal Review** in the status dropdown

c. Select **Save**.



Agency Dispute Standard Operating Procedures

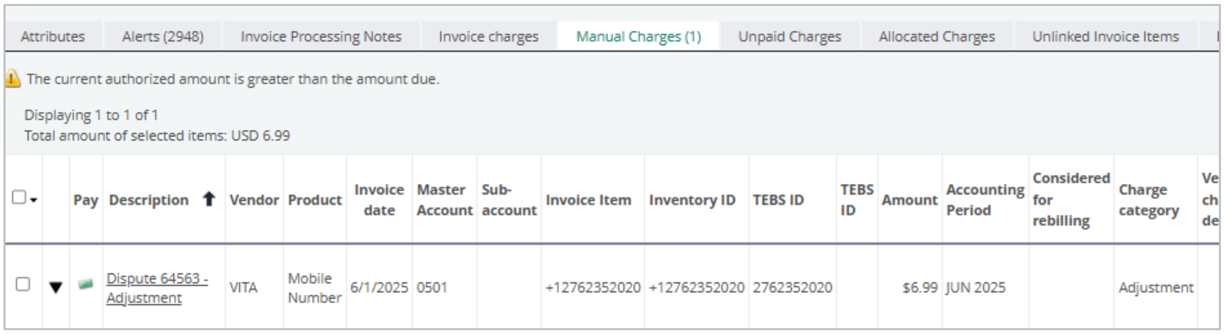
Step #	Step Name	Ticket Status	Responsible Role	Procedure	Expected Output
1	Identify invalid charge	N/A	Agency	Agency identifies invalid invoice charge(s).	
2	Gather supporting documentation	N/A	Agency	Agency obtains any supporting documentation or notes to include in the dispute ticket.	Documentation has been obtained
3	Dispute an invoice charge	N/A	Agency	Agency creates a dispute ticket from the invoice charges tab within an invoice.	Dispute ticket is created
4	Review dispute opened by agency	Pending Calero Review	Calero TEM Operations	Calero TEM Operations will investigate and work on the dispute through resolution.	Dispute ticket is reviewed. If additional information is needed, ticket navigates to Pending Agency Feedback. If not, ticket navigates to Pending VITA Approval status to continue the dispute workflow.
5	Review disputes that need additional information	Pending Agency Feedback	Agency	Agency reviews ticket notes. There may be a question from the Calero Operation team, request for additional documentation, etc.	Dispute ticket is reviewed and feedback provided. Send ticket back to Pending Calero Review status to continue the dispute workflow.
6	Review disputes opened by agency	Pending VITA Approval	VITA Billing	VITA Billing reviews ticket notes and documents, and will either approve or deny the ticket.	Dispute ticket is reviewed. If approved, navigates to Dispute Approved (See Step 7a – 7c). If denied, navigates to Denied (See Step 8a – 8).
7a	Review dispute approved by VITA Billing	Dispute Approved	Calero TEM Operations	Calero TEM Operations will review notes, complete credit calculations, and apply applicable amounts.	Dispute ticket is reviewed, notes are populated, and credit amounts are calculated.
7b	Credit Application	Pending Credit Application	Calero TEM Operations	Calero TEM Operations will update the dispute with approved/rejected amount and update the status of the ticket to “closed”.	Credit applied to account, pending next invoice generation.

Step #	Step Name	Ticket Status	Responsible Role	Procedure	Expected Output
7c	Credit Applied	Credit Applied	Calero TEM Operations	Credit posts to next account invoice.	Credits are included on the next rebill as a manual adjustment. Dispute ticket is considered closed.
8a	Review dispute denied by VITA Billing	Denied	Agency	Agency reviews ticket notes and denial reasoning.	Agency will either agree and acknowledge denial reason and move ticket to Acknowledged status or will disagree with the denial reason and move the ticket to Pending Calero Appeal Review.
8b	Dispute Denial Acknowledgement	Acknowledged	N/A	The ticket will navigate to this queue based on the output of step 8a. Once in this step, it will automatically navigate to Dispute Denied.	The ticket will be moved to Dispute Denied status. Dispute ticket is considered closed.
8c	Review dispute tickets where the agency disagrees with the denial reason.	Pending Calero Appeal Review	Calero TEM Operations	Calero TEM Operations will re-review the ticket agency notes and backup documents.	Ticket will be moved to Pending VITA Appeal Approval status.
8d	Review dispute tickets where the agency disagrees with the denial reason.	Pending VITA Appeal Approval	VITA Billing	VITA Billing will review all supporting documents, notes and ticket information, and make a decision.	VITA Billing will either agree with the denial disagreement and move to ticket Dispute Approved status (See Step 7a) or disagree and move ticket to Dispute Denied status.
8e	Dispute Denied	Dispute Denied	VITA Billing	Dispute ticket is denied. No further action will is taken.	Ticket is closed.

Application of Credit

When a dispute is resolved favorably, a manual adjustment is added to the next monthly invoice.

To view the credit, see the **Manual Charges** tab within the Invoice Detail.



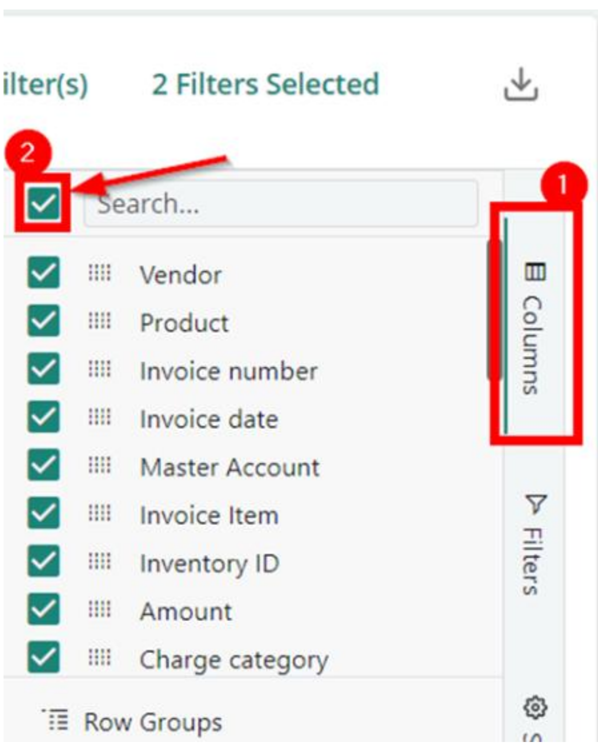
Agency Billing Reports

This section outlines the process for viewing and exporting Wireline and Mobility usage data from list view within TEMS.

VITA Agency Invoice Charges – List View

Navigate to **Invoice > Work Queues > Charges > Invoice Charges**

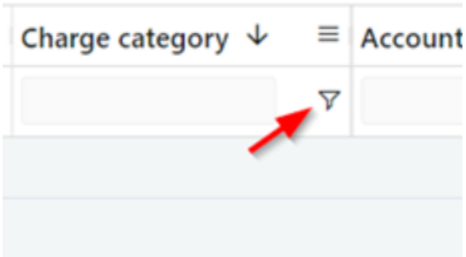
Note: In the Columns pane on the right side of the page, ensure all columns are selected / visible in the List View. These column settings become your default profile settings.



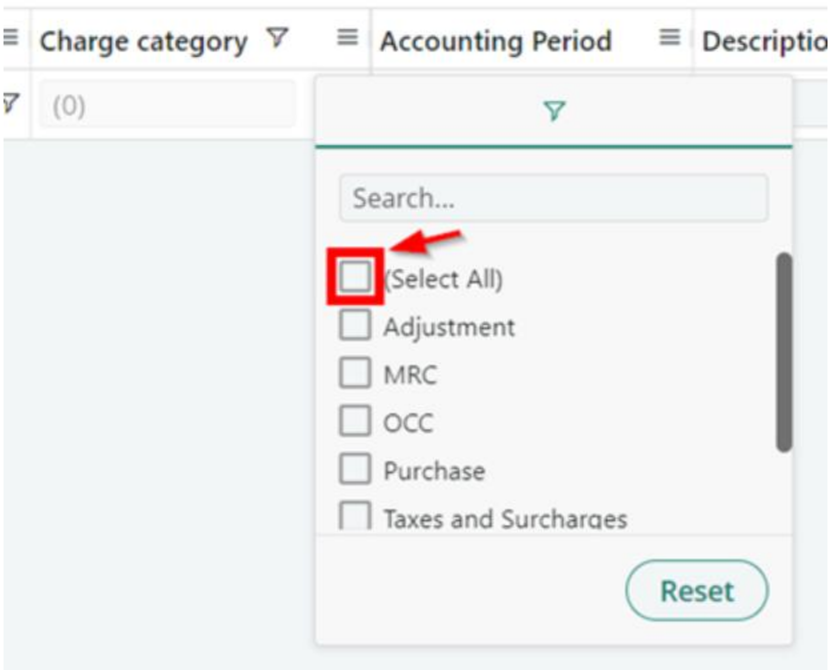
The Invoice Charges view shows all invoice charges in the system. Filter the data set as needed (see below).

To view only **MRC (Monthly Recurring Charges)**, follow these steps to filter the data:

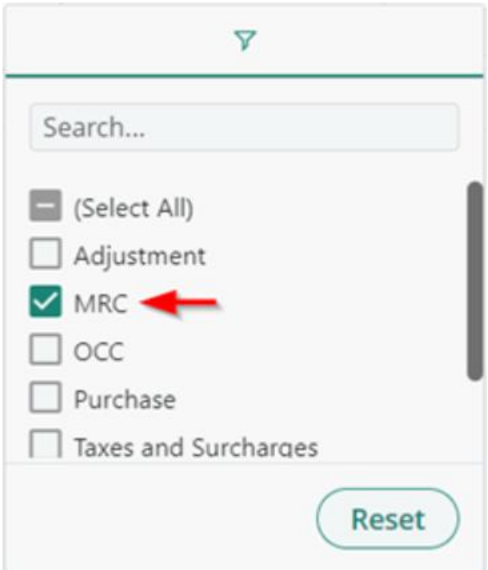
3) Click the filter icon in the **Charge category** column, as indicated by the red arrow:



3) By default, all charge categories are selected. Click the checkbox for **(Select All)** to remove the selections so that no box is checked.



3) Click the checkbox for **MRC** to show only MRC items.



The Invoice Charges list view will automatically refresh to show only MRC items. From here, you can apply filters to other columns as needed.

Filter the **Charge category** column to view other types of charges, such as:

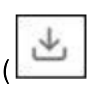
- Adjustments
- OCC
- Taxes and Surcharges

To view **Message Rate, Community Charge or Extended Area Calling**, filter the **USOC** column by these values:

Message Rate = “**MSG1**” (Vendor must be filtered on Supplier invoice, not rebill)

Community Charge = “**CC01**” (Vendor must be filtered on Supplier invoice, not rebill)

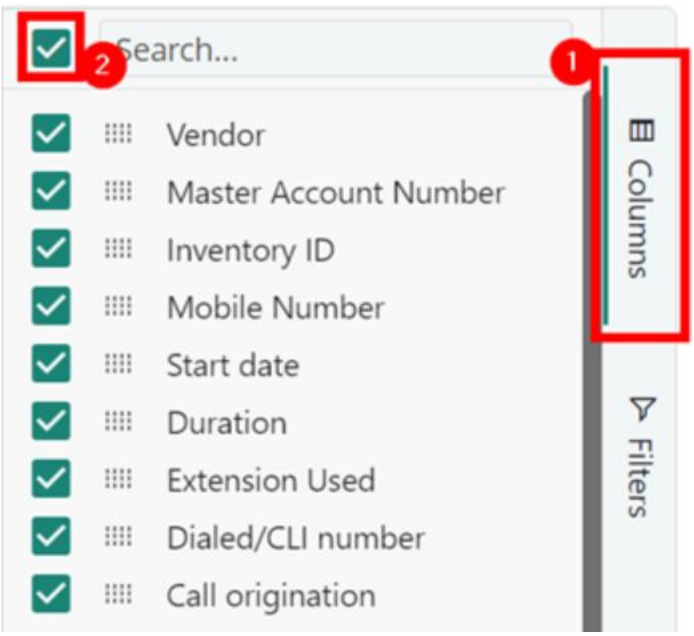
Extended Area Calling = “**EAC1**” (Vendor must be filtered on Supplier invoice, not rebill)

To export the list view data to Excel, click the download button () in the top-right corner of the page.

VITA Agency Invoice Call Records – List View (Wireline Usage)

Navigate to Calero.com > Invoice > Usage > View Invoice Call Records.

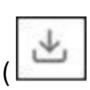
Note: In the Columns pane on the right, ensure all columns are selected / visible in the List View. These column settings become your default profile settings.



The View Invoice Call Records view shows all wireline usage in the system. Filter the data set as needed (see below).

To view only long-distance usage, filter the Call type column by “**LongDist**”.

To view only teleconference / audio conferencing usage, filter the Call type column by “**Toll Free**” and “**Incoming**”. Further, the TEBS ID field should also be filtered by “**IV**” so to view just those IV numbers and not other 800 Toll Free usage.

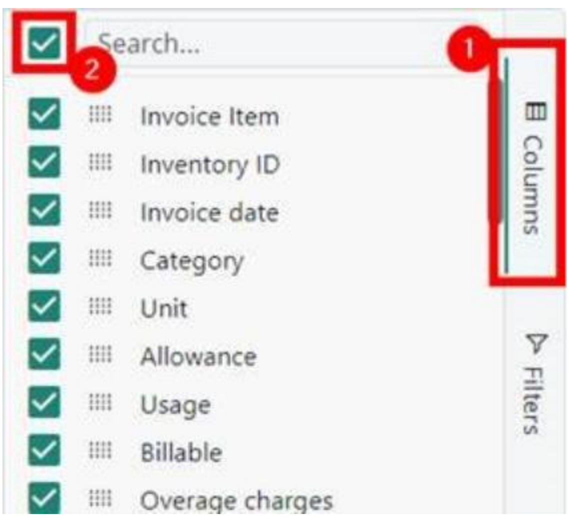
To export the list view data to Excel, click the download button () in the top-right corner of the page.

***Data in **Column: Invoice Item** should be used to identify the extension from which the call originated. **Column: Inventory ID** may contain additional characters and formatting that could cause data processing problems.

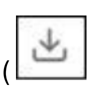
VITA Agency Invoice Mobile Usage – List View

Navigate to Calero.com > Mobility > Usage > Mobile Usage

Note: In the Columns pane on the right, ensure all columns are selected / visible in the List View. These column settings become your default profile settings.



The Mobile Usage view shows all wireless usage in the system. Filter the data set as needed (by Invoice date, Category, etc).

To export the list view data to Excel, click the download button () in the top-right corner of the page.

***Data in **Column: Invoice Item** should be used to identify the extension from which the call originated. **Column: Inventory ID** may contain additional characters and formatting that could cause data processing problems.