

# CATALYST



## Chargebacks and Bill Splits



**Josh Berkheimer**

Customer Success Manager  
EnergyCAP



**Zach Richardson**

Western Michigan University  
Energy Administration Specialist

# What is a chargeback?

The Chargebacks module creates bills within Utility Management to support Accounting or Facilities management.

When we say "chargeback" we're referring to any bill that Utility Management creates; some customers use the chargebacks module but aren't charging anything back to a customer or tenant

## **Other names for chargebacks:**

- Cost allocations
- Campus distributions
- Bill splits
- Rebilling/charge-outs
- Submeter bills
- Tenant bills

# Common reasons for chargebacks

- Cost allocation from vendor bills to multiple departments.
- Assign utility costs to specific projects, grants, and special activities.
- Create bills for tenants.
- Energy plant calculations and campus distribution tracking.
- True-up financial transactions.
- Detailed facility tracking and reporting (ENERGY STAR, Greenhouse Gas reporting).
- Mandatory energy use reporting by city or state governments.
- Track and analyze cost and use per site rather than at the campus level.

## Three primary components



### **Bill calculations**

create a new bill based on your custom calculations or from submeter readings, including Smart Analytics meters.



### **Bill splits**

are configured on accounts and divide a bill into one or more smaller bills.



### **Chargeback workflows**

organize groups of bill splits and calculations together into repeatable steps. This makes sure everyone is following the same process each month.

# Types of chargebacks



## Bill Calculations

- Submeters (can also link to SmartAnalytics meters)
- Summary meters
- Advanced bill creation



## Bill split

- Static percentage
- Dynamic percentage
- Advanced split
  - Split one bills use and/or cost based on another bill's use or cost



# Demo

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