

Automated Contractual Billing Notifications

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Why are we making this change?

Today, upcoming contractual billing dates are tracked and communicated through a largely manual process that requires ongoing coordination between Project Management, Billing/AR, and customers. This creates opportunities for notifications to be missed, delayed, or communicated inconsistently.

To improve visibility, consistency, and scalability, we're introducing an automated notification process for upcoming contractual billing start dates.

What's changing?

The new automated process will:

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- Notify customers by email approximately **60, 30, and 7 days** before contractual billing begins, with notifications logged to the project activity page
- Give Billing/AR advance visibility as billing dates approach
- Monitor notification delivery and automatically retry eligible notifications once email or contact issues are corrected
- Reduce the manual tracking and communication currently required from Project Management
- Create a more consistent, standardized billing notification experience for customers

Who's impacted?

This change primarily affects Project Management, Billing/AR, customers, and the internal teams supporting implementation and billing workflows.

- **Project Management** — Less manual work tracking billing dates and sending routine notifications. PMs will continue to maintain accurate customer and project information throughout the implementation lifecycle.
- **Billing/AR** — More consistent advance visibility into upcoming billing start dates, supporting billing readiness and coordination.
- **Customers** — Standardized advance communication about their billing start date, so expectations are clear well before it arrives.
- **Internal workstreams** — Teams supporting implementation, customer data, and billing will benefit from a more consistent process and clearer visibility into upcoming billing milestones.

What does this accomplish?

This automation creates a more consistent, scalable process organization-wide reducing manual effort, improving visibility across teams, and lowering the risk of missed billing communications.

To be clear: this does not change any contractual billing terms or start dates. It only improves how we communicate, track, and prepare for those existing milestones.
