

True-up rules checklist

Fill in one per usage contract. If two people would answer a line differently, the contract or your notes need to say it.

Customer / account ID	Order form date	Clause reference
Decision	Options	This contract (and clause)
ALLOWANCE		
True-up period How often usage is reconciled and billed	☐ Monthly ☐ Quarterly ☐ Annual	
Included units per period And how many per month if an annual amount is "allotted monthly"	Units: _____ per _____	
Unused included units At the end of each period	☐ Expire ☐ Roll over ☐ Pool across term	
ROLLOVER		
Rollover cap base 20% of what?	☐ % of commit ☐ % of unused ☐ Fixed units	
Ceiling on total rolled balance	☐ None ☐ _____ × monthly	
Rolled credit expiry Per lot, from when it was created	After _____ periods / days	
CREDITS AND DRAWDOWN		
Purchased / top-up credit expiry	☐ Never ☐ _____ months ☐ Term end	
Drawdown order Which credits are used first	☐ Earliest expiry first ☐ Other: _____	
Pooled metrics Credits per unit of each metric	_____	
OVERAGE		
Overage rate or tiers	_____	
Tier counting	☐ Accumulate over period ☐ Reset monthly	
When overage is invoiced	☐ Monthly in arrears ☐ Period end ☐ At threshold	
Minimum / shortfall If usage is under the commit	☐ None ☐ Billed ☐ Carried	
CHANGES		
Amendment effective from	☐ Effective date ☐ Next period start	
Interrupted period	☐ Prorate by days ☐ Old terms in full	
Unused units at amendment	☐ Carry forward ☐ Forfeit	
Prior periods	☐ Never recalculated; corrections as adjustments	