USER GUIDE

Performant Automated Compliance System

Performant Financial Corp./TouchPoint One

Table of Contents

Log In

To log in, enter URL https://performant.acuityapmr.com

Upon log in, Supervisor and Team Lead roles will be directed to the **Reports** table on the main dashboard. The default report view is the **Processing Grid – RELEASED THIS WEEK (TL/Sup)** report. (See Below)

9/1/2019-9/30/2019

Released	Case Number	Review Date	name	Score	Review Notes	TeamLead	Supervisor	QA	Rebuttal	By	Acknowledgement	AckDat
2019-09-02	2018086-08-127925	8/26/2019 11:00:12 AM	Allen, Kenneth	84 (Auto Fail)		rcollazo	CEvans2	QA 2			Send Request	
2019-09-02	201900408000303	8/26/2019 11:32:24 AM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
2019-09-02	2018323-08-001076	8/26/2019 11:36:26 AM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
2019-09-02	2018125-08-009734	8/26/2019 11:43:15 AM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
2019-09-02	2019084-08-027194	8/26/2019 12:01:56 PM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
2019-09-02	2018229-08-013644	8/26/2019 2:15:52 PM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
2019-09-02	2019084-08-248495	8/26/2019 2:29:44 PM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
	2019112-08-	8/26/2019	Allen									

Reports Table

The **Reports** table lists information about quality monitors completed during the selected time frame.

Information included in the table:

- Quality Assurance analyst
- Case Number
- Review Date
- Name of CSR
- Overall score
- Review Notes
- Released Status

- Team Lead and Supervisor
- Rebuttal and Rebuttal Response

Report Types

Selecting Reports

To navigate between the different report types, use the **Show:** drop down menu at the top of the report.

Processing Grid - RELEASED THIS WEEK (TL/Sup)

This is the default report that is populated for Supervisor and Team Lead roles. The **Processing Grid - RELEASED THIS WEEK (TL/Sup)** report displays all quality monitors that have been released for the current week. Supervisors and Team Leads only have visibility to their respective teams.

9/1/2019-9/30/2019

Released	Case Number	Review Date	name	Score	Review Notes	TeamLead	Supervisor	QA	Rebuttal	By	Acknowledgement	AckDat
2019-09-02	2018086-08-127925	8/26/2019 11:00:12 AM	Allen, Kenneth	84 (Auto Fail)		rcollazo	CEvans2	QA 2			Send Request	
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2019-09-02	2019084-08-248495	8/26/2019 2:29:44 PM	Allen, Kenneth	100		rcollazo	CEvans2	QA 2			Not Required	
[illegible]	2019112-08-	8/26/2019	Allen,	[illegible]		[illegible]	[illegible]	[illegible]			[illegible]	

Processing Grid – Month (TL/Sup)

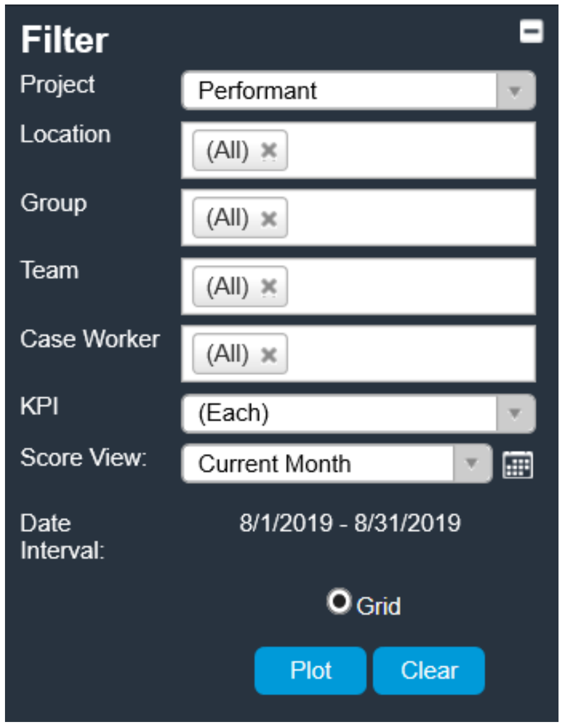
The **Processing Grid – Month (TL/Sup)** report displays all quality monitors that have been released for the selected month. Supervisors and Team Leads will only have visibility to their respective teams.

8/1/2019-8/31/2019

Case Number	Review Date	name	Score	Review Notes	TeamLead	Supervisor	QA	Rebuttal	By	Acknowledgement	AckD
2018291-08-037089	8/1/2019 11:03:37 AM	Farmer-Allen, Bloneva	100	QA Review 7/31/19	dlee	CEvans2	QA 1			Not Required	
2018198-08-000922	8/2/2019 2:17:58 PM	Brooks, Christopher	100		dlee	CEvans2	QA 5			Not Required	
2018339-08-082727	8/2/2019 2:19:31 PM	Eady, Nykia	100		dlee	CEvans2	QA 5			Not Required	
2018270-08-015464	8/2/2019 3:53:55 PM	Joseph, Gillian	100		dlee	CEvans2	QA 9			Not Required	
2018229-08-007312	8/2/2019 3:55:44 PM	Joseph, Gillian	100		dlee	CEvans2	QA 9			Not Required	
2018177-08-014247	8/5/2019 3:58:32 PM	Farmer-Allen, Bloneva	84 (Auto Fail)		dlee	CEvans2	QA 5			Send Request	
2019022-08-004259	8/5/2019 4:21:42 PM	Foster, April	100	FYI- The generated 530 letter did not process successfully. Please regenerate the letter.	CEvans2	CEvans2	QA 6			Not Required	

Filtering the Table

The **Reports** table can be filtered using the **Filter** menu. The table can be filtered by Project, Location, Group, Team, Case Worker, KPI, and Score View (Date Interval)



The **Reports** table can also be filtered using the **Filter:** search bar at the top of the table. The search bar can be used to filter specific information in the any of the columns in the table.

Note: the filter search bar is case-sensitive.

Accessing Quality Monitors

Saved quality monitors will be available for Supervisor and Team Lead roles to review in the **Reports** table.

Team Leads and Supervisors will be able open and review new quality monitors once the monitors are released. The release date for new quality monitors is always **9AM ET the next Monday**.

Saved quality monitors can be opened directly from the **Reports** table by clicking the score for the selected monitor.

QA	Case Number	Review Date	name	Score	QA Notes	Review Notes	Status	TeamLead
Keisha Anderson	3130300-11-005606	2019-08-02	Lall, Rowena	100			Released	LGrooms-Sowell

Quality Monitor Form

Each quality monitor form will include information pertaining to the monitor and case worker.

Project	Commercial Repayment Cente
Reviewer	1, QA
Review Date	8/1/2019 11:03:37 AM
User Group	Craig Evans Group
User Name/ID	Farmer-Allen, Bloneva (bfarmerallen)

Additional fields include:

- GHP or NGHP
- Letter ID and Name (Drop-down menu that includes all Letter IDs)
- Supervisor
- Team Lead
- Manager

Case Number	2018291-08-037089
	GHP NGHP
Letter ID and Name	ML710-Free Form Letter
Supervisor	Evans, Craig (CEvans2) *
Team Lead	Lee, Dorique (dlee) *
Manager	Morris, Karen (KMorris)

The quality monitor form contains a set of parameters, each with its own checklist that have point values assigned. Each checklist item contains a comment section that will display an explanation of the area of opportunity. Comments are added by the Quality Analyst that completed the monitor.

Parameters	Checklist	Points	Disposition	Comments
Information Disclosure	Inappropriate information shared with incorrect entity. This includes any **PHI and/or PII shared.**	0 (AF)	Pass Fail	
Decision Making	**Rationale/Case Level** -Case decision was inappropriate for the documentation provided. This category also relates to scenarios where all pertinent documentation was not reviewed to make case decision.	16 (AF)	Pass Fail	
	Inappropriate Letter- The incorrect letter was generated, and the letter sent is not concurrent with the decision and or SOP's and Job Aids. Correct Letter (If Incorrect)	16 (AF)	Pass Fail	
	Case Work- Case not processed according to SOP's, Job Aids and Resources. (E.g. Incorrect claims removed, claims dispositioned inappropriately, letter was initiated from the incorrect DCN, check wasn't acknowledged etc.)	6	Pass Fail	
Documentation Match	**Outgoing Correspondence** provides inaccurate and incomplete information (E.g. Boxes Checked, DOI, Insurer ID, CC Field, Subscriber Name, Check Number)	6	Pass Fail	
	The **Amounts and Balances** on the outgoing correspondence are incorrect. (E.g. Payment Amount, Interest Amount, Total Amount Due)	6	Pass Fail	
	The **Dates** on the outgoing correspondence are inaccurate. (E.g. Next Interest Accrual Date, Demand Date etc.)	6	Pass Fail	
	The **Claim Summary Form/Enclosure** reflects inaccurate information. (E.g. Incorrect Balance Due)	6	Pass Fail	
System Updates	**Notes** are incomplete and inconsistent with decision and documentation being reviewed. (Notes must be present in both BCRS and every record of HIGLAS where applicable)	16 (AF)	Pass Fail	
	HIGLAS Balance is incorrect and inconsistent with case decision. (E.g. Adjustment not being made according to the provided documentation and checks not being applied appropriately.)	16 (AF)	Pass Fail	
	Case Status and Claims placed in the incorrect status in BCRS, once case decision was made.	6	Pass Fail	
	Task Not Completed- This occurs when a work item/items are closed and caseworker documents that a letter was sent but no letter was initiated or successfully sent.	0 (AF)	Pass Fail	
	Score:	100	100%	Submit Rebuttal Close

Scoring

Each new quality monitor form is automatically populated with a score of 100%. Selecting **Fail** dispositions will update the overall score, based on the points assigned to each disposition.

Sections with **0 (AF)** in the **Points** column, will update the overall score to a **0% Auto Fail** if a **Fail** disposition is selected.

Sections with **16 (AF)** in the **Points** section will maintain the overall score based on the point deduction and will record the monitor as an **Auto Fail** if a **Fail** disposition is selected.

Sections that only include point values in the **Points** section will deduct the amount of points listed from the overall score if a **Fail** disposition is selected. If a **Fail** disposition is selected, a point multiplier will also appear that can be applied to the deduction.

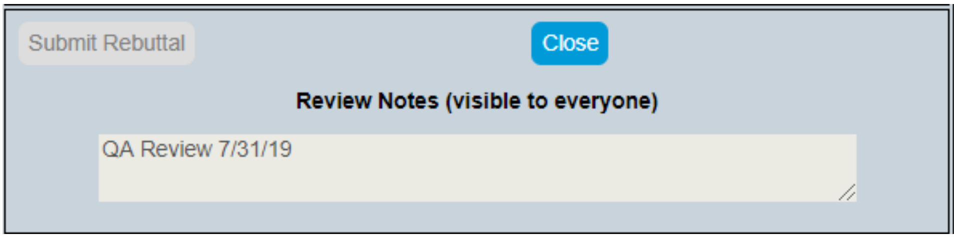
The **Acknowledgement Required** check box will automatically be checked for any monitor that is scored below a 94%.

Comments and Review Notes

Comments entered by Quality Assurance will be displayed in the **Comments** box to the right of each section in the quality monitor.

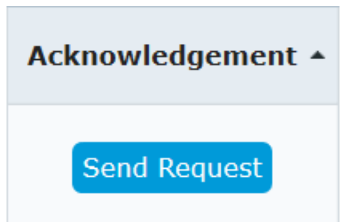
Review Notes that have been entered by Quality Assurance will be displayed in the **Review Notes** field provided in the bottom right area of the monitor form.

- **Review Notes** that have been entered into any quality monitor are visible to everyone including, CSRs, Supervisors, Team Leads, Managers, and Quality Assurance



Acknowledgement Requests

Acknowledgement requests are sent directly from the **Reports** table using the **Send Request** link in the **Acknowledgement** column.



Once an acknowledgement request is sent, the employee will receive a written communication via email that an acknowledgement request has been submitted. The employee can acknowledge the monitor by opening the monitor and clicking the red acknowledgement box.

From: **Acuity-NoReply** <system@acuityapm.com>
Date: Wed, Aug 7, 2019 at 9:18 AM
Subject: Monitor 3182700-00-018992 Requires Acknowledgement
To: <redie@performantcorp.com>

Hello,

You have a monitor that requires your acknowledgement.

Please log in using this link: https://performant.acuityapm.com

Once logged in, you can click on the following link to review/acknowledge this monitor:

Internal Review Wed Jul 31 16:45:53 EDT 2019

Thank You.

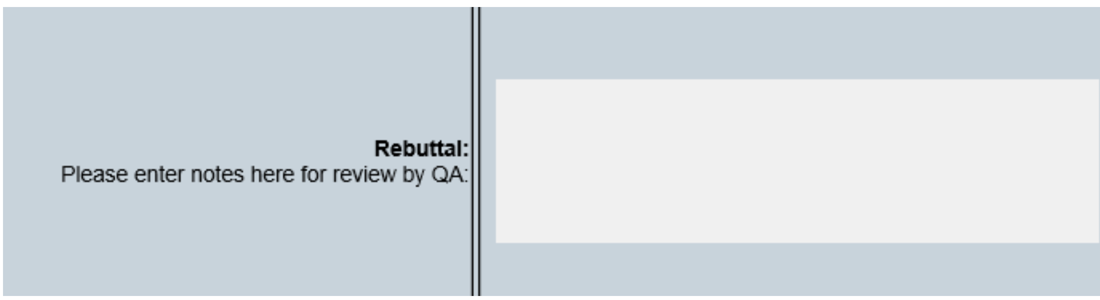
Supervisors and Team Leads are able to view if an acknowledgement request has been sent by viewing the **Acknowledgement** column.

- Requests that have been sent will update to **Sent**
- Requests that have not been sent will update to **Not Sent**
- Requests that do not require acknowledgment will update to **Not Required**

Once the monitor has been acknowledged by the employee, the **Reports** table will update the **AckDate** column to the date the employee acknowledged the monitor.

Rebuttals

Rebuttals are handled by Team Leads and Supervisors, and are accessed inside of each quality monitor form in the **Rebuttal** section.



The **Rebuttal** section allows for notes to be entered outlining the reason for the rebuttal. Once the rebuttal is submitted, the rebuttal will be submitted to the entire QA team. The QA team will receive an external email that includes details about the monitor, as well as a link to the monitor.

From: **Acuity-NoReply** <system@acuityapm.com>
Date: Fri, Jul 26, 2019 at 9:00 AM
Subject: Rebuttal Submitted for Monitor: 2019018-08-029075
To: <cgoldsmith@performantcorp.com>, <debojohn@performantcorp.com>, <eanicette@performantcorp.com>, <jdameus@performantcorp.com>, <kanderson@performantcorp.com>, <karthur@performantcorp.com>, <kfrederique@performantcorp.com>, <ktucker@performantcorp.com>, <twhite2@performantcorp.com>

Hello,
A rebuttal was just submitted for a monitor by: **dwashington**

The monitor case number is **2019018-08-029075** regarding case worker: **vgordon**

Please respond to the rebuttal within the allowed timeframe.

Direct Link to monitor: https://performant.acuityapm.com/monitor/monitor_review.aspx?origin=report&id=216

Note: This message was sent to all QA's

QA will then be able to review the rebuttal and provide a response. If the rebuttal is approved and there is a change in score, the QA should check the box **Rebuttal resulted in a change in scoring.**

Once the rebuttal response is submitted, the Team Lead and the Supervisor will receive an external email confirming that a response was received for the rebuttal. The email will include information regarding the quality monitor, as well as link to the monitor.

From: **Acuity-NoReply** <system@acuityapm.com>
Date: Thu, Jul 25, 2019 at 9:27 AM
Subject: Response Received for Rebuttal to Monitor: 2019018-08-029075
To: <dwashington@performantcorp.com>, <swilliams2@performantcorp.com>

Hello,
A response was just submitted to your rebuttal by: **eanicette**

The monitor case number is **2019018-08-029075** regarding case worker: **vgordon**

Direct Link to monitor: https://performant.acuityapm.com/monitor/monitor_review.aspx?origin=report&id=216

Note: This message was sent to both the team lead and the supervisor.

The **Reports** table will update with the rebuttal response and the QA who responded.

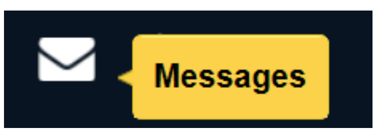
Important Notes

- Comments from QA cannot be changed by Team Leads or Supervisors
- Rebuttal comments from the Team Lead/Supervisors cannot be changed by QA
- Rebuttals must be submitted within 48 hours of release, which occurs each Monday at 9AM ET
- QA does not have the ability to send Acknowledgement Requests
- Team Leads can see overall scores of all monitors, but cannot open other Team Leads' monitor forms

Email (aka Acuity Message Center)

Acuity houses internal messaging and chat features that can be accessed directly from the main dashboard.

To access the internal messaging system, select the messages icon at the top of the dashboard, or selecting **Message Center**.

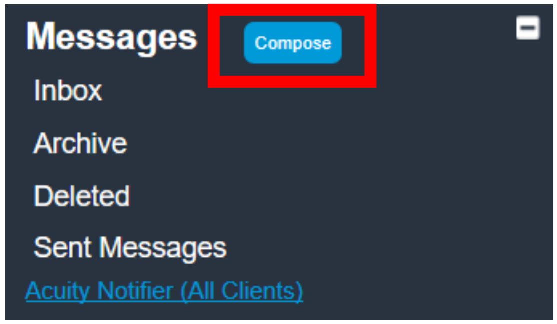


Selecting either of these options will direct the user to the **Message Center**.

From the **Message Center**, users will be able to access the following messaging folders:

- **Inbox** - all new and previously received messages will be available to view in the Inbox
- **Archive** – any saved messages will be saved in the Archive folder
- **Deleted** – Deleted messages will be sent to the Deleted folder
- **Sent Messages** – Sent messages will be saved in the Sent Messages folder

To compose a new message, click **Compose**.



Selecting **Compose** will open a blank email form. (see below)

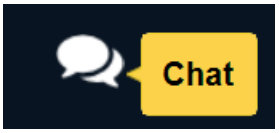
The blank form contains the following fields:

- **To: -** Click inside of the blank field to populate a menu of recipients to choose from. The menu will contain recipients that are assigned to the project that is currently selected in the Dashboard
- **Subject** – the subject field should be populated with the subject of the message
- **Body of the Message** – The body of the message is the field used to enter the message

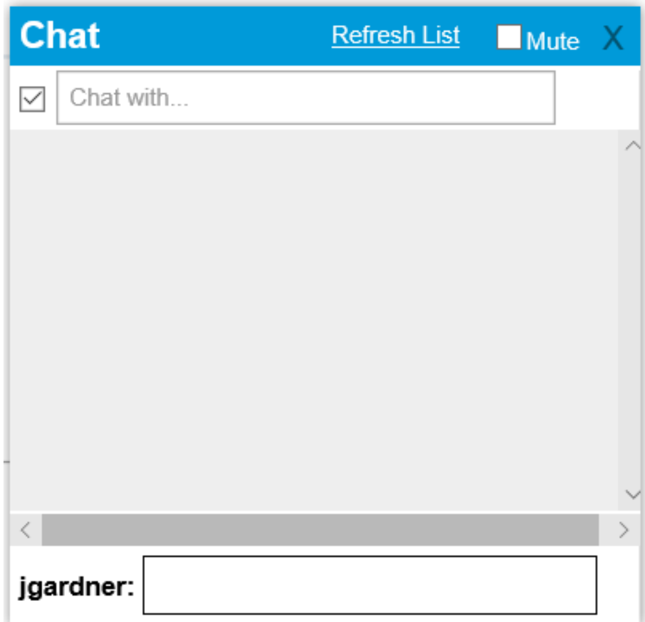
Once all fields have been filled out, click the **Send** button to send the message.

Chat

Acuity also houses an internal instant messaging feature, **Chat**. To access the chat function, select the **Chat** icon at the top of the Dashboard.



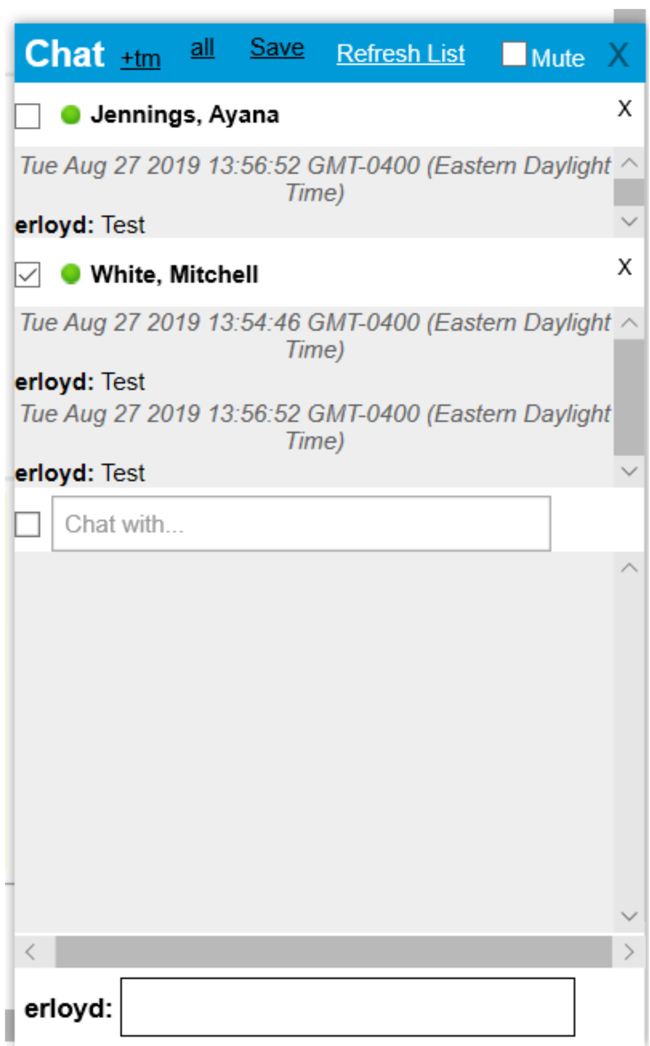
Selecting the chat icon will open a chat window in the bottom left corner of the dashboard.



To begin a new chat, click inside of the **Chat with…** field to populate a list of recipients to select from. Chat has the ability to chat with one individual user, or a group of users by selecting multiple recipients.

Once users are selected, messages can be sent by entering information into the field next to the logged in user's username and pressing Enter.

To open multiple chat conversations simultaneously, select the **+tm** icon at the top of the chat window. This will open a list of all users assigned to the current team. By selecting the check boxes next to each user, individual chats can be initiated with each checked user.



Note: Only users that have check marks will receive chat messages. Simply check and uncheck users to add and/or remove them from the chat conversation.