

Performant Recovery Agent's User Guide

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System Login



Username:

Password:

☐ Remember me

Login

When you login for the first time (simply enter the user name and password into the appropriate fields as shown in the screen shot above), you will be prompted to change the default password (typically **P@ssw0rd**) to one of your own (remember it or store it somewhere safe for future reference should you forget it).

Please Change Your Password

Your password needs to be changed.

Current Password:

Use at least 8 characters and at least 1 number.

New Password:

Confirm New Password:

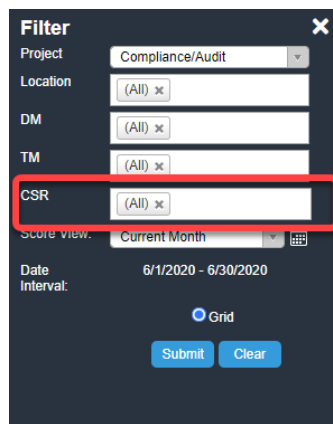
Submit Change

At some point during or near the end of training, you should have received a user name and a default password to access Acuity. A special URL has been set up for you to access Acuity.

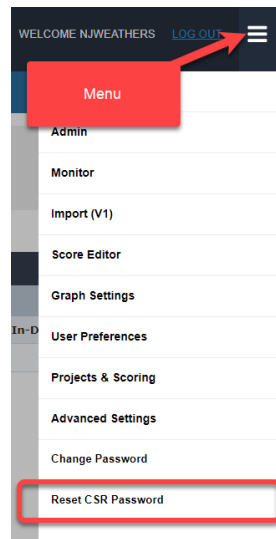
<https://performant-recovery.acuityapm.com/>

Password Reset

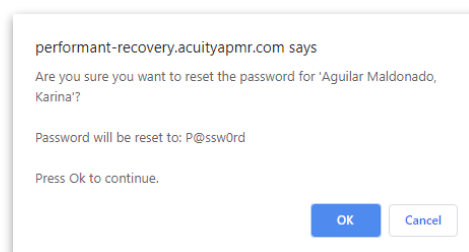
1. To reset an employee's password, first select that employee from the "CSR" filter on the left



2. Open the menu and select "Reset CSR Password"



3. Once clicking "Reset CSR Password", a prompt will appear asking you to confirm the password change, along with what the new password will be



4. To confirm the password change, simply click "OK"

Communications and Support



You can reach out to your supervisor by using the **Chat** feature accessible at the top of Acuity.

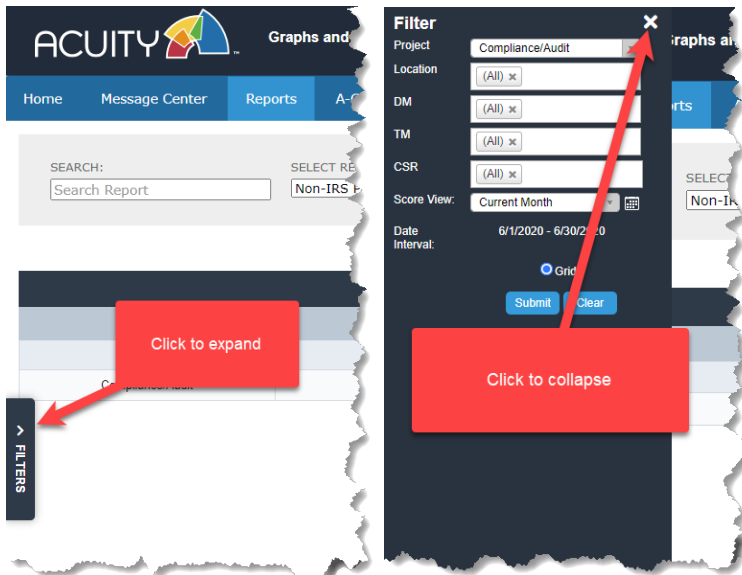


Communication may also be facilitated via Acuity's conventional **Messaging** feature accessible via the envelope icon. A round marker next to the envelope icon will indicate when a new message has been received.

Filters and Views

Filters located in Acuity's left panel - enabled or disabled based on role - determine what information is displayed in the main report window. The filter is expandable and collapsible.

To isolate specific data (location, DM, TM, CSR, or date range) use the filter. The data selection in the Filter panel is based on hierarchy. Example: Team Managers can view all CSRs on their teams. CSRs can only see their own data. To view historical performance, select a previous date range from the **Score View** filter.



TIP: after selecting filters, click the **Submit** button to run the new or modify the existing report.

Audit Status Description

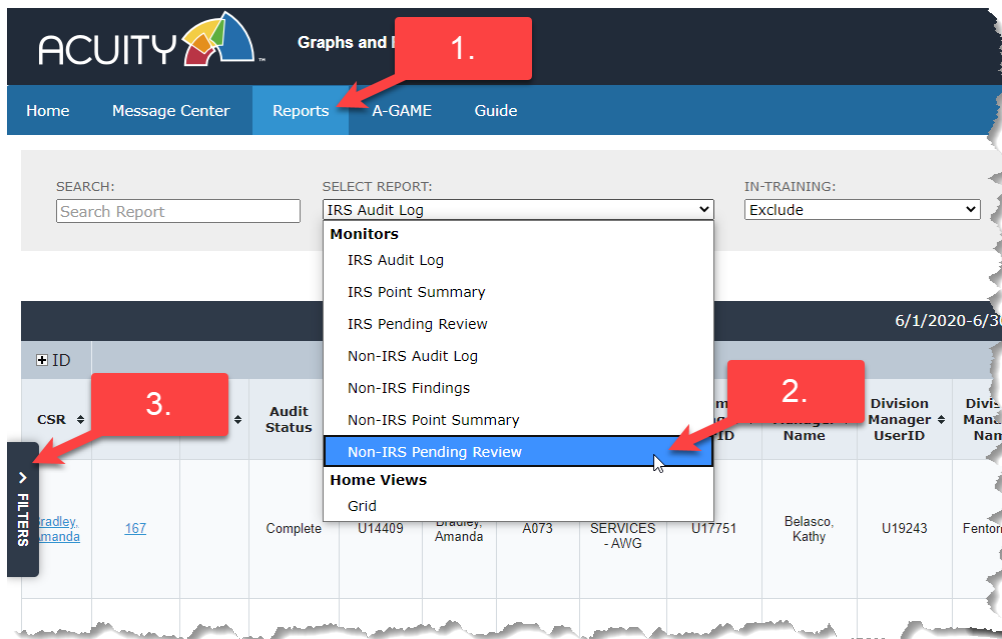
Status	Action Required by
In Draft	Compliance
Pending Agent Review	Agent
Pending Dispute Review	Manager
Pending Compliance Review	Compliance
Pending Corrective Action	Manager
Pending Agent CAR Confirmation	Agent
Complete	

Reviewing Audit Monitoring Forms

Pending Agent Review

To review the Audit Monitoring Forms that are in a Pending Agent Review status, select the IRS or Non-IRS Pending Review report.

1. Click on the Reports tab.
2. Select IRS or Non-IRS Pending Review report from the dropdown menu.
3. Click on Filters to expand the Filter panel.



4. Select the Score View (date range). To select the date range, click on the dropdown menu.
5. Click Submit to run the report. The results will appear in the window along with any CARs that are currently in process. CARs that require your attention will have the following statuses:
 - Pending Agent Review – these are new CARs that need to be reviewed.
 - Pending Agent CAR Confirmation – this is to confirm that you have received Corrective Action from your manager.
6. Click on the X to collapse the Filter panel. The report will be displayed in the window.
7. Click on the Monitor ID # to open the CAR monitoring form with Pending Agent Review status.
8. Below is an example of the CAR monitoring form with the status: Pending Agent Review. You can either agree with ALL observations and point totals on the form or disagree with at least one of the findings or point on the form.

Collector Name/ID: Aguilar Maldonado, Karina (U22648)

Extension: 3605

Job Focus: ATAX

Hire Date: 11/26/2018

Auditor: Wathers, Nicole

Audit Period: 6/11/2020 - 6/11/2020

Audit Type: ☐ Phone ☐ Lawsuit ☐ Complaint ☐ Internal Finding ☐ QA Audit

Previous Points: 2.00

Form Point Total: 4

Rolling 90 Day Point Total: 2.00

Office: LA

DM: Tillery, Kelly (U13864)

TM: Parr, Nichole (U17068)

CAR #: 193

Escalate: ☐

Compliance Findings: This is a test record only.

Client: ASAC

Performant Category: Recorded Line (RLN)

Performant Category: State/City Law (SCL)

Client: NYSE

Performant Category: Excessive Rings (EXR)

Agent Review/Acknowledgement of Form

☒ I agree with ALL observations and point totals on this form.

☐ I disagree with at least one of the findings, or points, assessed above.

Submit Acknowledgment/Dispute to Manager

Close

Monitor Release Date: 6/22/2020 1:15:08 PM

- Agree – click on the first radio button labeled “I agree with ALL observations and point totals on this form” and click Submit Acknowledgement / Dispute to Manager button. This releases the form to your manager. Once the form is released to the manager, it can no longer be edited by you. *Note: If you click Close, the form will close and remain in Pending Agent Review status.*
- Disagree – click on the second radio button labeled “I disagree with at least one of the findings, or points assessed above”. Check the box below the finding(s) that are being disputed, enter the dispute reason in the Agent Dispute text box. If the box next to the finding is not checked, this means that you agree with that finding or point total. Once the finding(s) are disputed, click Submit Acknowledgement / Dispute to Manager button. This releases the form to your manager. Once the form is released to the manager, it can no longer be edited by you. *Note: If you click Close, the form will close and remain in Pending Agent Review status.*

In the example below the agent is disputing 1 of the 3 findings.

- After the Submit Acknowledgement / Dispute to Manager button is clicked, you will navigate back to the IRS or Non-IRS Pending Review report. Click Submit again to re-run the report, this will display CAR’s new status:
 - Pending Corrective Action – if you agreed with ALL observations and point totals.
 - Pending Dispute Review – if you disagreed with at least one finding.

The next step in the process is for your Manager and Compliance to review the CAR.

- If you agreed with the findings, your Manager will perform the Corrective Action.
- If you disagreed with any observation, your Manager will review the disputed finding(s).
 - If they find the dispute Invalid (in other words, they disagree with you), they will perform the Corrective Action.

← Back | CAR - NON-IRS

Collector Name/ID>	Aguilar Maldonado, Karina (U22648)		Previous Points
Extension	3605		Form Point Total
Job Focus	ATAK		Rolling 90 Day P
Hire Date	11/26/2018		Office
Auditor	Weathers, Nicole		DM
Audit Period	6/11/2020 - 6/11/2020		TM
Audit Type	<input checked="" type="checkbox"/> Phone <input type="checkbox"/> Lawsuit <input type="checkbox"/> Complaint <input type="checkbox"/> Internal Finding <input type="checkbox"/> QA Audit		CAR #
			Escalate:

Compliance Findings:
This is a test record only.

Client	Performant Category	Performant SubCategory	Comments
ASAC	Recorded Line (R)		Test record
	<input type="checkbox"/> Dispute this finding		
	<input checked="" type="checkbox"/> Dispute this finding		
	Enter your dispute in the box provided		
	Agent Dispute		
	Please review, I did not receive NYC hold time violation		
		Dispute is: <input type="radio"/> Valid <input type="radio"/> Invalid	Compliance Response
		Manager Comments	<input type="radio"/> Agree <input type="radio"/> Disagree
NYSE	Excessive Rings (EXR)		Test record
	<input type="checkbox"/> Dispute this finding		

Agent Review/Acknowledgement of Form

☐ I agree with ALL observations and point totals on this form.
☒ I disagree with at least one of the findings, or points, assessed above.

[Submit Acknowledgment](#) [Dispute to Manager](#)

[Close](#)

- If they find the dispute Valid (in other words, they agree with you), the CAR will be routed to Compliance for dispute review. Once Compliance completes the dispute review, the CAR will be returned to the manager for the Corrective Action Step/notification that the dispute review is complete.

Once the steps above are complete, the CAR will be returned to you for one last step. The last step in the process is to confirm that you have received Corrective Action Training from your manager.

Pending Agent CAR Confirmation

To review the Audit Monitoring Forms that are in a Pending Agent CAR Confirmation status, select and run the IRS or Non-IRS Pending Review report. Select a CAR with this status and click on the Monitor ID # to open the form.

Home Message Center Reports A-GAME Guide

SEARCH: SELECT REPORT: IN-TRAINING: SCORING:

6/1/2020-6/30/2020

CSR	Monitor ID	Agent UserID	Agent Name	Team Manager UserID	Team Manager Name	Division Manager UserID	Division Manager Name	Audit StartDate	Audit EndDate	Examiner	Audit Status
Aguilar Maldonado, Karina	177	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	U13864	Tillery, Kelly	06/10/2020	06/10/2020	Weathers, Nicole	Pending Agent CAR Confirmation
Aguilar Maldonado, Karina	193	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	U13864	Tillery, Kelly	06/11/2020	06/11/2020	Weathers, Nicole	Pending Agent CAR Confirmation
Aguilar Maldonado, Karina	163	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	U13864	Tillery, Kelly	06/15/2020	06/15/2020	Gackenhaimer, Jeff	Pending Corrective Action

1. Check the box "I have received corrective action training from my manager".
2. Click Confirm Receipt of Training button to complete the CAR.

After the Confirm Receipt of Training button is clicked, you will navigate back to the IRS or Non-IRS Pending Review report. Click Submit again to re-run the report, the CAR will no longer appear in the report as the status is now Complete.

Back CAR - NON-IRS

Collector NameID: Aguilar Maldonado, Karina (U22648) Previous Points: 2.00
 Extension: 3605 Form Point Total: 4
 Job Focus: ATAX Rolling 90 Day Point Total: 2.00
 Hire Date: 11/26/2018 Office: LA
 Auditor: Weathers, Nicole DM: Tillery, Kelly (U13864)
 Audit Period: 6/11/2020 - 6/11/2020 TM: Parr, Nichole (U17068)
 Audit Type: ☐ Phone ☐ Lawsuit ☐ Complaint ☐ Internal Finding ☐ QA Audit CAR #: 193
 Escalate:

Compliance Findings:
 This is a test record only.

Client: ASAC Call Identifier: 12345 / Ariva Account ID: 12345 / Eureka ID: 123 - Point Total: 2

Performant Category: Recorded Line (RLN) Performant SubCategory: Test record Points: 1

Dispute this finding

Performant Category: State/City Law (SCL) Performant SubCategory: NYC Hold Time Violation Comments: Test record Points: 2

Dispute this finding

Enter your dispute in the box provided

Agent Dispute: I agree, Compliance please review.

Manager Comments: I have reviewed. The finding stands.

Client: NYSE Call Identifier: / Ariva Account ID: / Eureka ID: - Point Total: 2

Performant Category: Excessive Rings (EXR) Performant SubCategory: Test record Points: 2

Dispute this finding

Attach File

Agent Review/Acknowledgement of Form

☐ I agree with ALL observations and point totals on this form.
☐ I disagree with at least one of the findings, or points, assessed above.
 Acknowledgement Timestamp: 6/22/2020 1:29:32 PM

Manager Corrective Action Comments:

TEST RECORD - Met with the agent and retained on all of the findings above.

Corrective Action with Agent Is Complete: ☐

Corrective Action Completion Timestamp: 6/23/2020 9:42:05 AM

Agent Confirmation of Corrective Action Training

☐ I have received corrective action training from my manager

This monitor has been reviewed by the case worker.
 Management & Compliance will review all agent disputes & comments.

Close

Monitor Release Date: 6/22/2020 1:15:08 PM

Report Menu

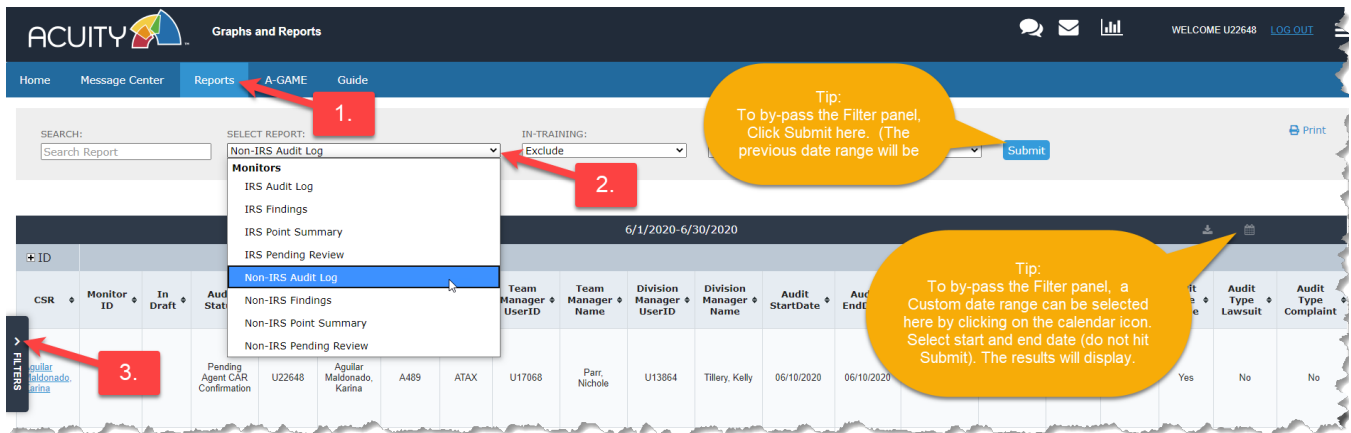
Reports are enabled or disabled based on the user's role and permissions. There are 4 reports that you will have access:

Monitors

- **IRS or Non-IRS Audit Log** – this is a list of the CAR details within select date range.
- **IRS or Non-IRS Point Summary** – this report provides a summary list for the following:
 - **Date Range Points** – These are the points of the completed & pending CARs for the selected date range.
 - **Rolling 90-Day Points** – These are the completed & pending CAR points from the end date of the date range and any points going back 90 days (this number includes the Date Range Points). *Note: if the date range end date is greater than the current date, the current date is used as the 90-day reference point.*
 - **Pending Points** – These are CAR points that are in a pending status and not yet complete.
 - **In-Draft Pending Points** – These points are only visible for the Compliance and Admin teams.
- **IRS or Non-IRS Pending Review** – This is the report for any CARs that are in the review stage and not yet complete for the selected date range.
- **IRS or Non-IRS Findings** – This report lists all Findings for every CAR (regardless of the status) in the selected date range.

Report Generation:

1. Click on the Reports tab.
2. Select the report from the drop-down menu.
3. Click the Filters tab to expand the Filter Panel. *Note: Project, Location, DM, TM, and CSR will be pre-populated as you will only be able to see your data.*
4. Select the Score View (date range) either from the drop-down menu. For a custom date range, click



on the calendar icon and select a start and end date.

5. Click Submit to run the report.
6. Click the X to collapse the Filter panel. The report results will be displayed in the window.



Report Navigation Tips:

- Reports have Search capability to further narrow down the report results.
- The data can be sorted by clicking the arrows after the column heading.

The screenshot displays a report navigation interface. At the top, there is a search bar labeled "SEARCH:" with the placeholder text "Search Report". To its right is a "SELECT REPORT:" dropdown menu currently showing "Non-IRS Audit Log". Further right is an "IN-TRAINING:" dropdown menu showing "Exclude". To the right of that is a "SCORING" dropdown menu showing "Balanced Score". A blue "Submit" button is located to the right of the "SCORING" dropdown. A red arrow points from the "Search Report" text to the search bar, with a red callout box labeled "Search capability".

Below the search bar is a table header. The header has a dark blue background with the date range "6/1/2020-6/30/2020" on the right. The first column is labeled "ID" with a plus icon. The second column is labeled "CSR" with a dropdown arrow. The third column is labeled "Monitor ID" with a dropdown arrow. The fourth column is labeled "Draft" with a dropdown arrow. The fifth column is labeled "Audit Status" with a dropdown arrow. The sixth column is labeled "Agent UserID" with a dropdown arrow. The seventh column is labeled "Agent Name" with a dropdown arrow. The eighth column is labeled "Artiva UserID" with a dropdown arrow. The ninth column is labeled "Job Focus" with a dropdown arrow. The tenth column is labeled "Team Manager UserID" with a dropdown arrow. The eleventh column is labeled "Team Manager Name" with a dropdown arrow. The twelfth column is labeled "Division Manager UserID" with a dropdown arrow. The thirteenth column is labeled "Division Manager Name" with a dropdown arrow. The fourteenth column is labeled "Audit StartDate" with a dropdown arrow. The fifteenth column is labeled "Audit EndDate" with a dropdown arrow. The sixteenth column is labeled "Examiner" with a dropdown arrow. The seventeenth column is labeled "Previous Points" with a dropdown arrow. The eighteenth column is labeled "Points" with a dropdown arrow. The nineteenth column is labeled "Rolling 90-Day Points" with a dropdown arrow. A red arrow points from the "Monitor ID" column header to the dropdown arrow, with a red callout box labeled "Sort capability".