USER GUIDE

Performant Performance Management & Automated Compliance System

Performant Financial Corp./TouchPoint One

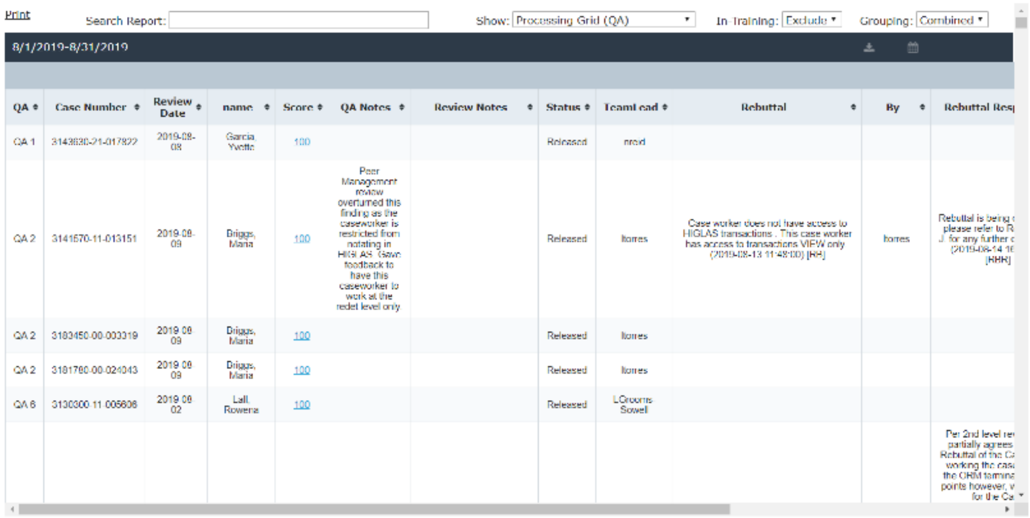
Table of Contents

System Flow for Quality Assurance Role

Log In

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

Upon log in, Quality Assurance roles will be directed to the **Reports** table on the main dashboard. The default report view is the **Processing Grid (QA)** report. (See Below)


Print Search Report: Show: Processing Grid (QA) In-Training: Exclude Grouping: Combined

8/1/2019-8/31/2019

QA	Case Number	Review Date	name	Score	QA Notes	Review Notes	Status	TeamLead	Rebuttal	By	Rebuttal Res
QA 1	3143630-21-017822	2019-08-08	Garcia, Yvette	100			Released	rreid			
QA 2	3141570-11-013151	2019-08-09	Briggs, Maria	100	Peer Management review overturned this finding as the caseworker is restricted from notating in HIGLAS. Gave feedback to have this caseworker to work at the redet level only		Released	ltorres	Case worker does not have access to HIGLAS transactions . This case worker has access to transactions VIEW only (2019-08-13 11:48:00) [RR]	ltorres	Rebuttal is being please refer to R J. for any further (2019-08-14 1 [RBR]
QA 2	3183450-00-003319	2019-08-09	Briggs, Maria	100			Released	ltorres			
QA 2	3181780-00-024043	2019-08-09	Briggs, Maria	100			Released	ltorres			
QA 6	3130300-11-005606	2019-08-02	Lall, Rowena	100			Released	LGrooms-Sowell			
											Per 2nd level re partially agrees Rebuttal of the C working the cas the CRM termina points however, for the Ca

Reports Table

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

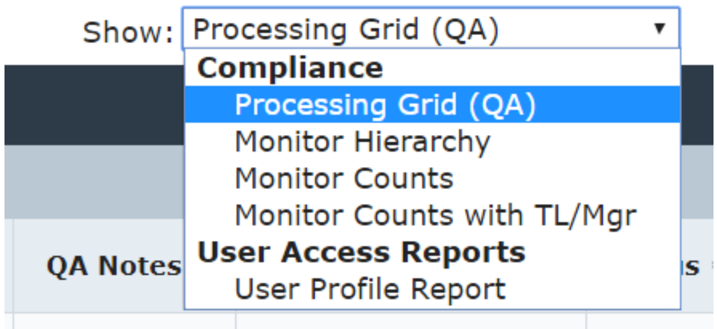
Information included in the table:

- Quality Assurance analyst
- Case Number
- Review Date
- Name of CSR
- Overall score
- QA and Review Notes
- Released Status
- Team Leader
- Rebuttal and Rebuttal Response

Report Types

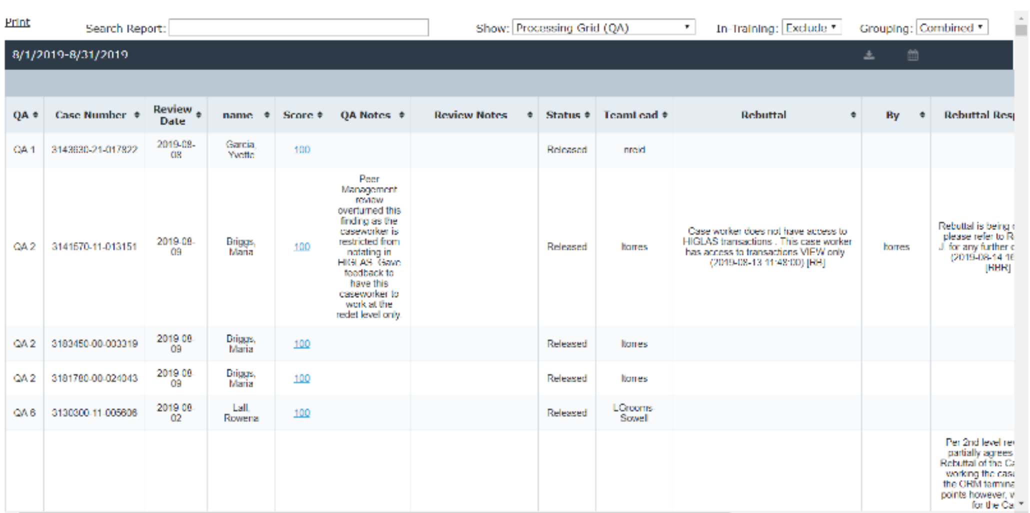
Selecting Reports

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



Processing Grid (QA)

This is the default report that is populated for Quality Assurance roles. The **Processing Grid (QA)** report displays all quality monitors for the selected dates, along with relevant information regarding each monitor.



Print Search Report: Show: Processing Grid (QA) In-Training: Exclude Grouping: Combined

8/1/2019-8/31/2019

QA	Case Number	Review Date	name	Score	QA Notes	Review Notes	Status	TeamLead	Rebuttal	By	Rebuttal Res
QA 1	3143830-21-017822	2019-08-08	Garcia, Yvette	100			Released	nreid			
QA 2	3141570-11-013151	2019-08-09	Briggs, Maria	100	Peer Management review overturned this finding as the caseworker is restricted from notating in HIGLAS. Gave feedback to have this caseworker to work at the redet level only		Released	ltorres	Case worker does not have access to HIGLAS transactions . This case worker has access to transactions VIEW only (2019-08-13 11:48:00) [RB]	ltorres	Rebuttal is being please refer to R J. for any further (2019-08-14 1 [RBR]
QA 2	3183450-00-003319	2019-08-09	Briggs, Maria	100			Released	ltorres			
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QA 6	3130300-11-005606	2019-08-02	Lall, Rowena	100			Released	LGrooms-Sowell			
											Per 2nd level re partially agrees Rebuttal of the C working the cas the CRM termina points however, for the Ca

Monitor Hierarchy

The **Monitor Hierarchy** report provides a summarized list of the quality monitors for the selected date range.

8/1/2019-8/31/2019

QA	Case Number	Review Date	UserId	name	Score	AF	LetterID	Supervisor	TeamLead	AckRequired	AckDate
eanicette	3143630-21-017822	8/8/2019 3:42:02 PM	ygarcia	Garcia, Yvette	100		OCR	SWilliams2	nreid	No	
cgoldsmith	3141570-11-013151	8/9/2019 8:49:48 AM	mbriggs	Briggs, Maria	100		NA	MOjeda	ltorres	No	
cgoldsmith	3183450-00-003319	8/9/2019 8:56:37 AM	mbriggs	Briggs, Maria	100		CPL	MOjeda	ltorres	No	
cgoldsmith	3181780-00-024043	8/9/2019 8:52:37 AM	mbriggs	Briggs, Maria	100		OCR	MOjeda	ltorres	No	
Kanderson	3130300-11-005606	8/2/2019 8:46:17 AM	rlall	Lall, Rowena	100		NA	JHeldreth	LGrooms-Sowell	No	
twhite2	3190140-00-012396	8/1/2019 3:45:02 PM	kpalmer	Palmer, Keisha	68	Auto Fail	NA	MOjeda	nreid	Yes	
eanicette	2018291-08-037089	8/1/2019 11:03:37 AM	bfarmerallen	Farmer-Allen, Bloneva	100		ML710	CEvans2	dlee	No	
djohnson	3173200-11-007854	8/1/2019 4:00:00 PM	lbrown	Brown, Lashonda	100		ML538	JHeldreth	dwashington	No	
cgoldsmith	3173630-11-007546	8/2/2019 11:25:53 AM	mroldan	Roldan, Melissa	100		OCR	SWilliams2	dwashington	No	
cgoldsmith	3173600-10-000672	8/2/2019 11:28:53 AM	mroldan	Roldan, Melissa	100		OCR	SWilliams2	dwashington	No	

Monitor Counts

The **Monitor Counts** report displays a total count of completed monitors, along with overall percentages for GHP Accuracy, NGHP Accuracy, and Total Accuracy.

8/1/2019-8/31/2019

Project	Total Reviewed	GHP	NGHP	GHP Accuracy	NGHP Accuracy	Total Accuracy	Case Work	Notes	Case Level	Inappropriate Letter	Task Not Completed	Outgoing Correspondence
Performant	822	370	452	93.30%	95.07%	94.27%	46	76	68	45	11	2

Monitor Counts with TL/Mgr

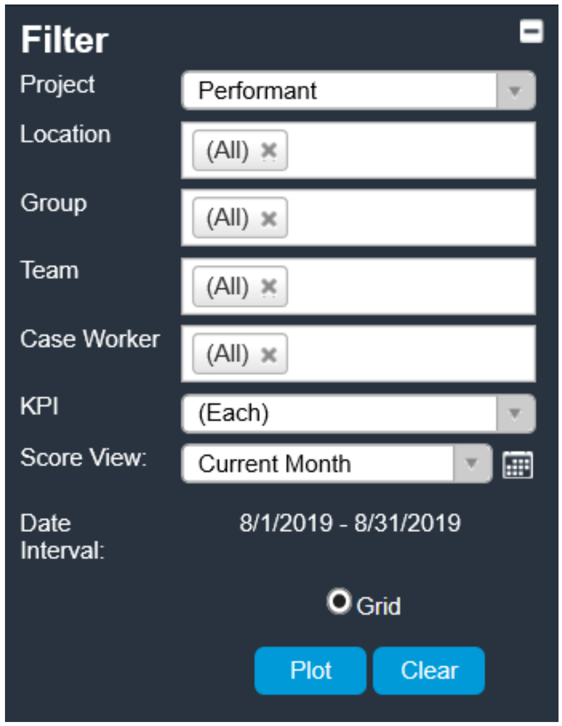
The **Monitor Counts with TL/Mgr** report further drills down the data in the **Monitor Counts** report by Team Lead and by Manager

8/1/2019-8/31/2019

Project	Team Lead	Manager	Total Reviewed	GHP	NGHP	GHP Accuracy	NGHP Accuracy	Total Accuracy	Case Work	Notes	Case Level	Inappropriate Letter	Task N Comple
Performant	CEvans2	CEvans2	26	26	0	91.38%	0.00%	91.38%	2	3	3	1	1
Performant	dlee	CEvans2	95	95	0	92.36%	0.00%	92.36%	9	12	7	10	1
Performant	dwashington	CEvans2	1	0	1	0.00%	100.00%	100.00%	0	0	0	0	0
Performant	JLeal	CEvans2	1	1	0	100.00%	0.00%	100.00%	0	0	0	0	0
Performant	KMorris	CEvans2	1	1	0	100.00%	0.00%	100.00%	0	0	0	0	0
Performant	RArellano	CEvans2	15	13	2	100.00%	100.00%	100.00%	0	0	0	0	0
Performant	rcollazo	CEvans2	49	49	0	96.90%	0.00%	96.90%	4	4	3	1	0
Performant	SWilliams2	CEvans2	26	26	0	94.23%	0.00%	94.23%	2	0	1	1	1
Performant	ltorres	cgoldsmith	1	1	0	100.00%	0.00%	100.00%	0	0	0	0	0
Performant	LGrooms-Sowell	DPassmore	16	0	16	0.00%	96.63%	96.63%	1	1	2	0	0
Performant	dwashington	dwashington	2	0	2	0.00%	100.00%	100.00%	0	0	0	0	0
Performant	CEvans2	KMorris	6	6	0	96.33%	0.00%	96.33%	1	1	0	0	0

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)

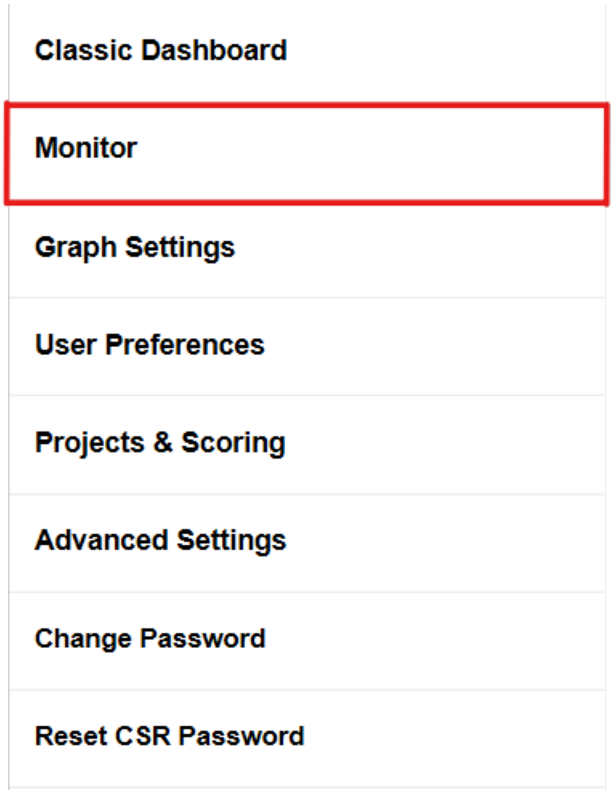


The **Reports** table can also be filtered using the **Filter:** search bar at the top of the table. The search bar can be used to filter specific information in the any of the columns in the table.

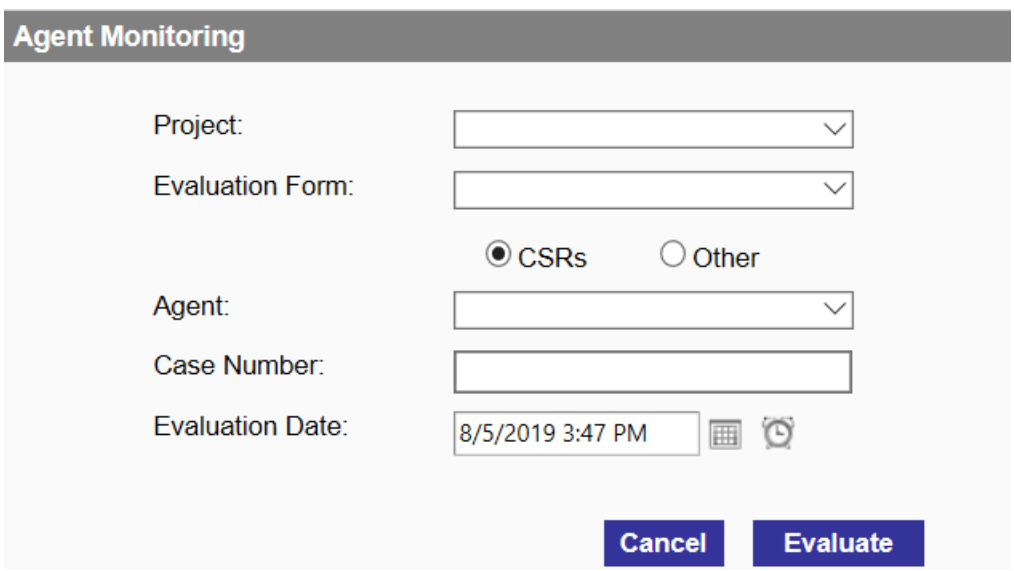
Note: the filter search bar is case-sensitive.

Quality Monitoring

The quality monitoring functionality is accessed by opening the Menu on the main dashboard, and selecting **Monitor**.



The user will be directed to the **Monitor** page where a new quality monitor can be created.



Quality Monitoring (cont.)

Each new monitor form has required fields of information that can be populated through the drop-down menus.

- **Performant** is used to populate the **Project** field

- **Internal Review** is used to populate the **Evaluation Form** field
- The **Agent** drop-down menu contains all active agents in Acuity to select from
- The **Case Number** field should include the case number that corresponds with the quality monitor
- The **Evaluation Date** records the time and date of the quality monitor evaluation

Once all fields have been completed, select **Evaluate** to open the quality monitor form.

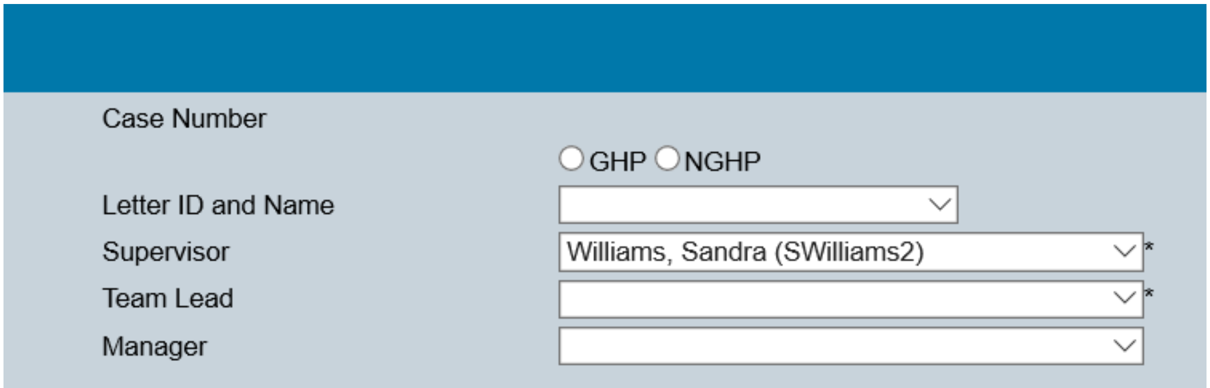
Quality Monitor Form

Each new quality monitor form will populate with the initially entered information, along with additional fields that can be entered.

Performant - Internal Review	
Project	Commercial Repayment Cent
Reviewer	Jackson, Rosemarie
Review Date	8/5/2019 3:47:33 PM
User Group	Caseworker Group
User Name/ID	Allen, Kenneth (kallen)
Acknowledgement Required:	☐ (Acknowledgement is always require for scores <= 94%)

Additional fields include:

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



The quality monitor form includes a list of parameters, a checklist of input statements that map to question numbers, a disposition for each question, along with a comments box for each section.

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

Review Notes and **QA Notes** can be entered in each quality monitor form, in the fields provided in the bottom of the monitor.

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

- Placing the word “Hold” in the **QA Notes** will place the monitor on hold and prevent the form from being released
- Once ready to be released, deleting the word “Hold” will automatically release the form

To submit the monitor form, click **Save Monitor**

Saved Quality Monitors

Saved quality monitors will be available for all Quality Assurance 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 EST 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

Acknowledgement Requests

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

Acknowledgement
Send Request

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.

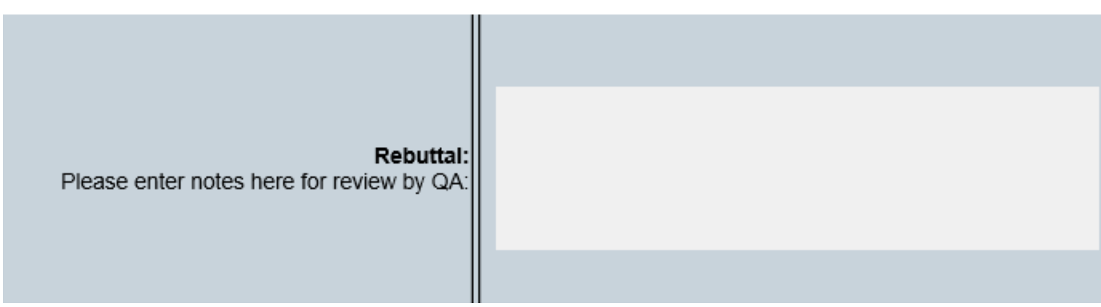
QA's and Admins are able to view if an acknowledgement request has been sent by viewing the **Acknowledgement** column.

- 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.**

Rebuttals (cont.)

Once the rebuttal response is ready to be submitted, the QA will click **Submit Rebuttal Response**.

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**

Please review the response and submit further comments (if needed) within the required timeframe.

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
- 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.

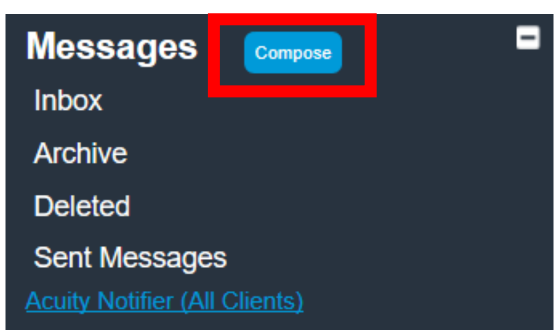
To access the internal messaging system, select the messages icon at the top of the dashboard, or selecting **Message Center**.

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)

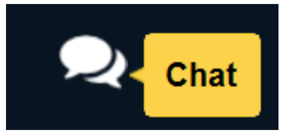
The blank form contains the following fields:

- **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

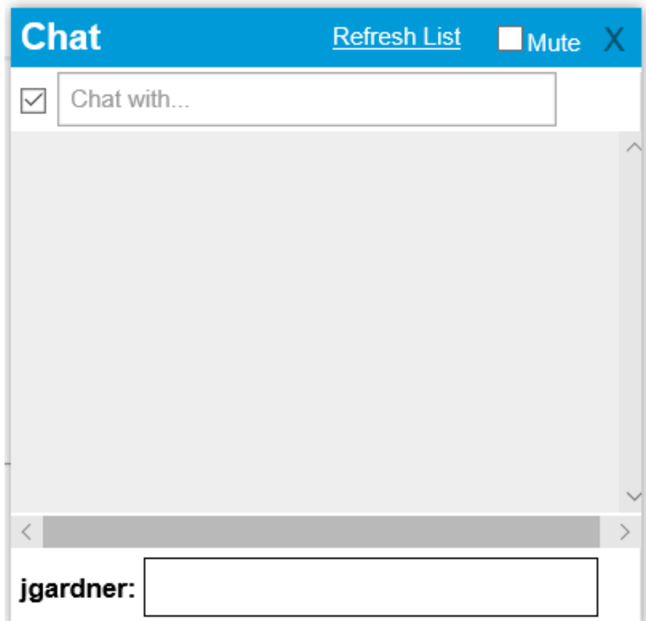
Once all fields have been filled out, click the **Send** button to send the message.

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.



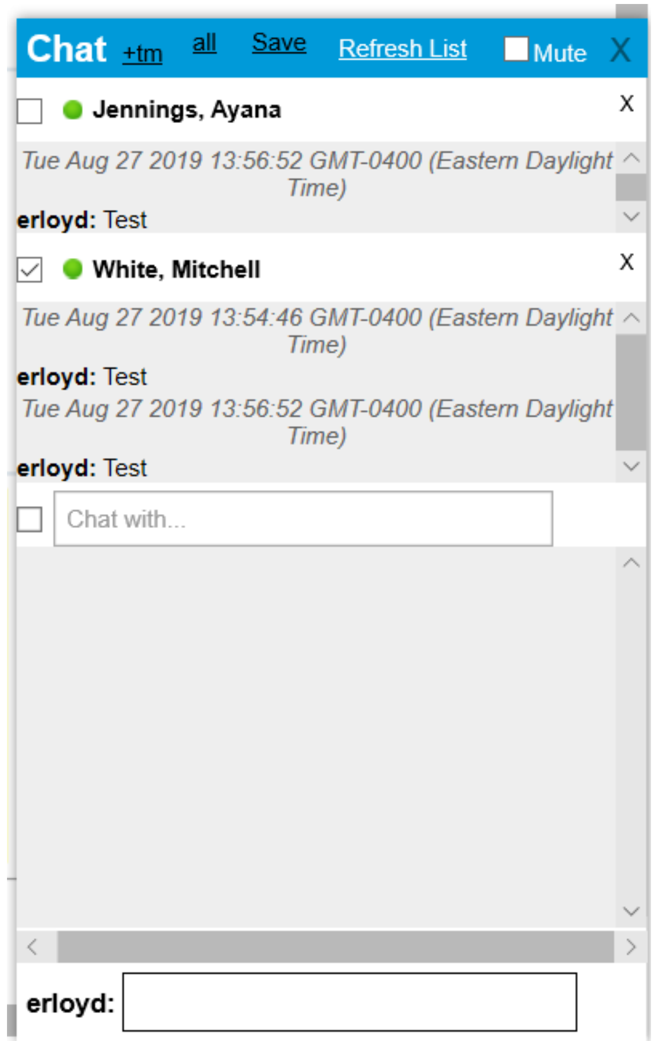
Selecting the chat icon will open a chat window in the bottom left corner of the dashboard.



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.

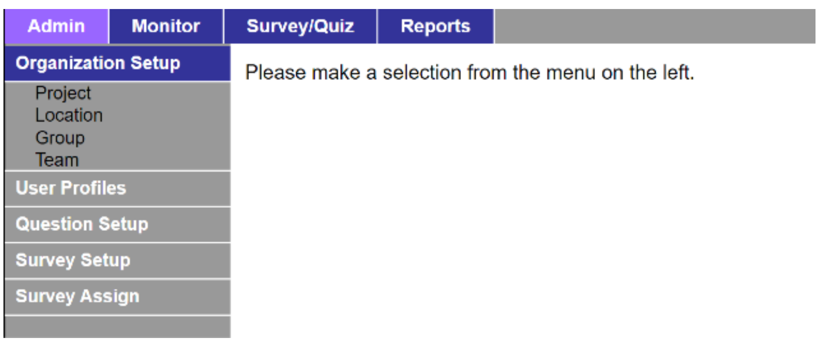
Quizzes, Surveys, Polls

From an administrative standpoint, there are four core steps in the Quiz/Survey/Poll process.

1) **Creating questions**
2) **Creating quizzes, surveys, or polls**
3) **Assigning quizzes, surveys, or polls**
4) **Analyzing the results**

To access the Quiz/Survey Module

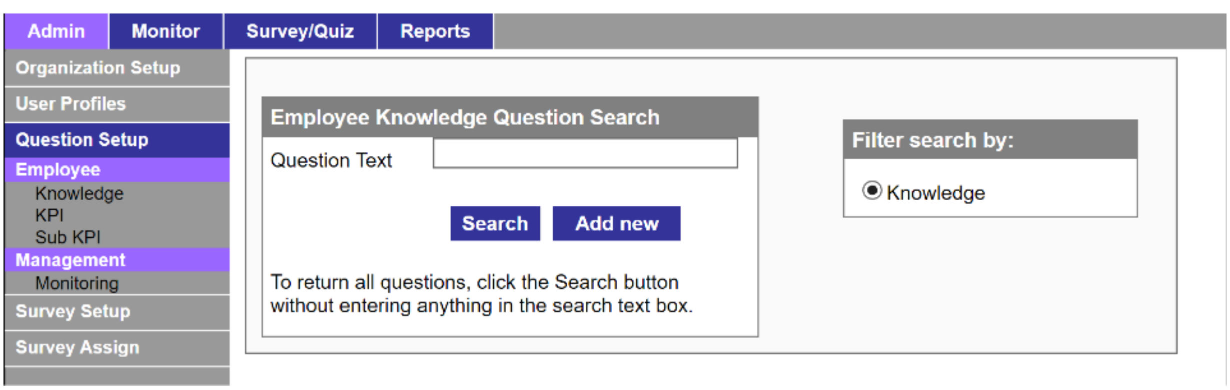
To access the quizzing module, click the icon in the top right area. The screen below will be displayed.



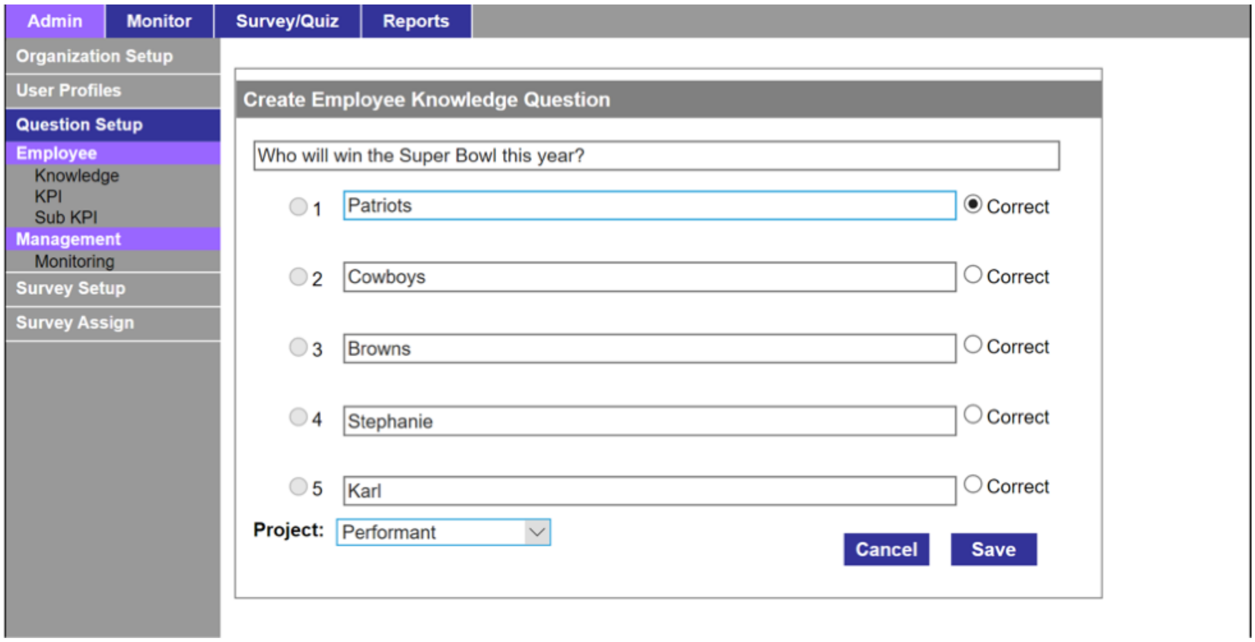
Creating Questions

Surveys, Polls, and Quizzes require a repository of questions and answers.

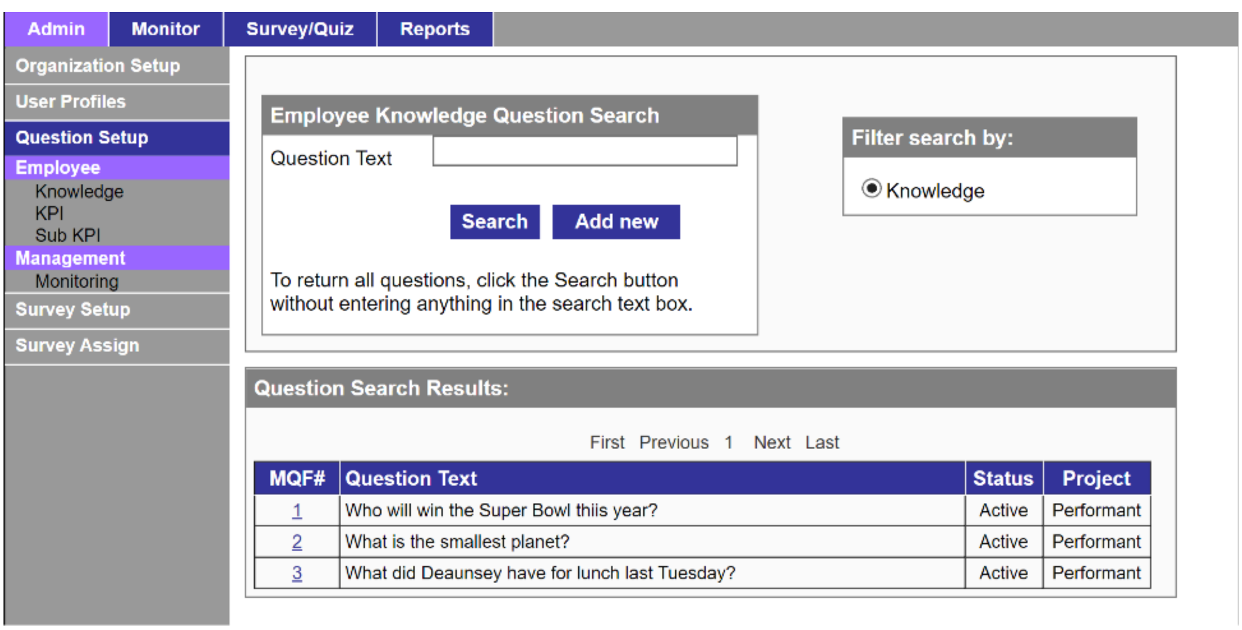
To create a **New** question, click **Question Setup** from the left menu panel.



Then click the **Add new** button, create the question, assign it to a project and click **Save**.

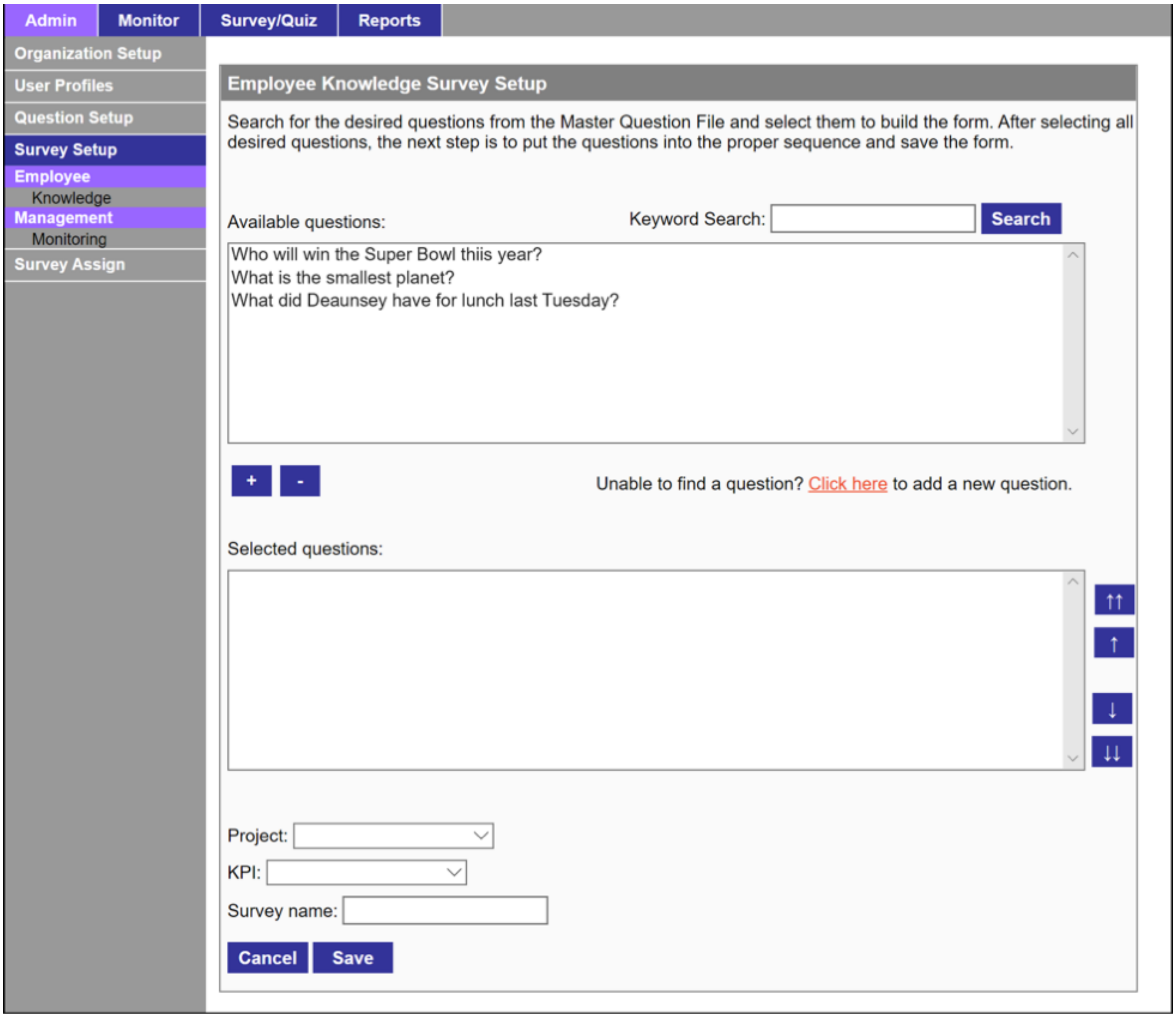


Over time, your accumulated “knowledge-base” of questions can be reviewed and edited by clicking the **Search** button upon which all existing questions will be displayed in the bottom window.

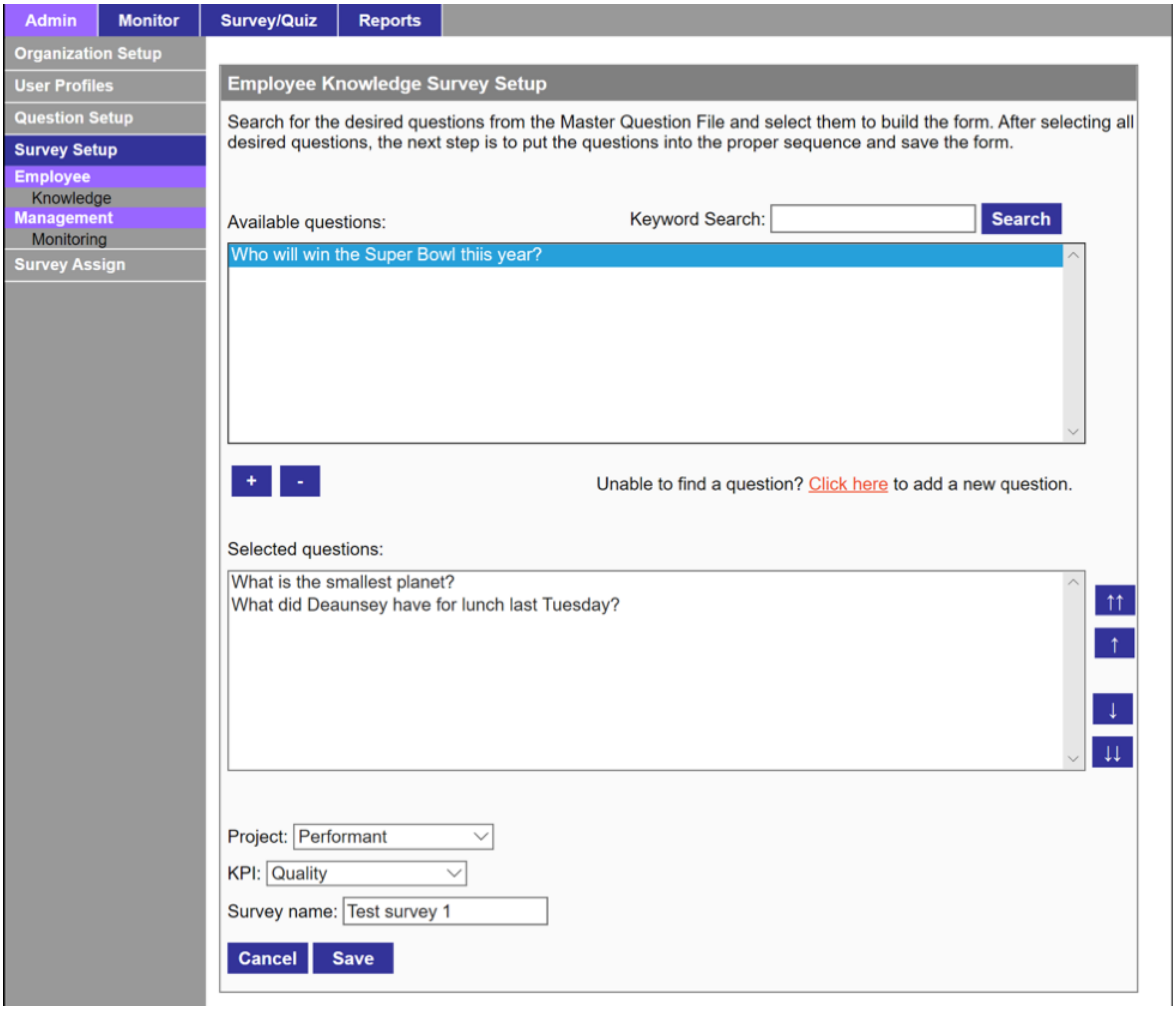


Creating Quizzes, Surveys, or Polls

Now that you have questions, you can create a quiz! From the left panel, click **Survey Setup | Knowledge | Add New**



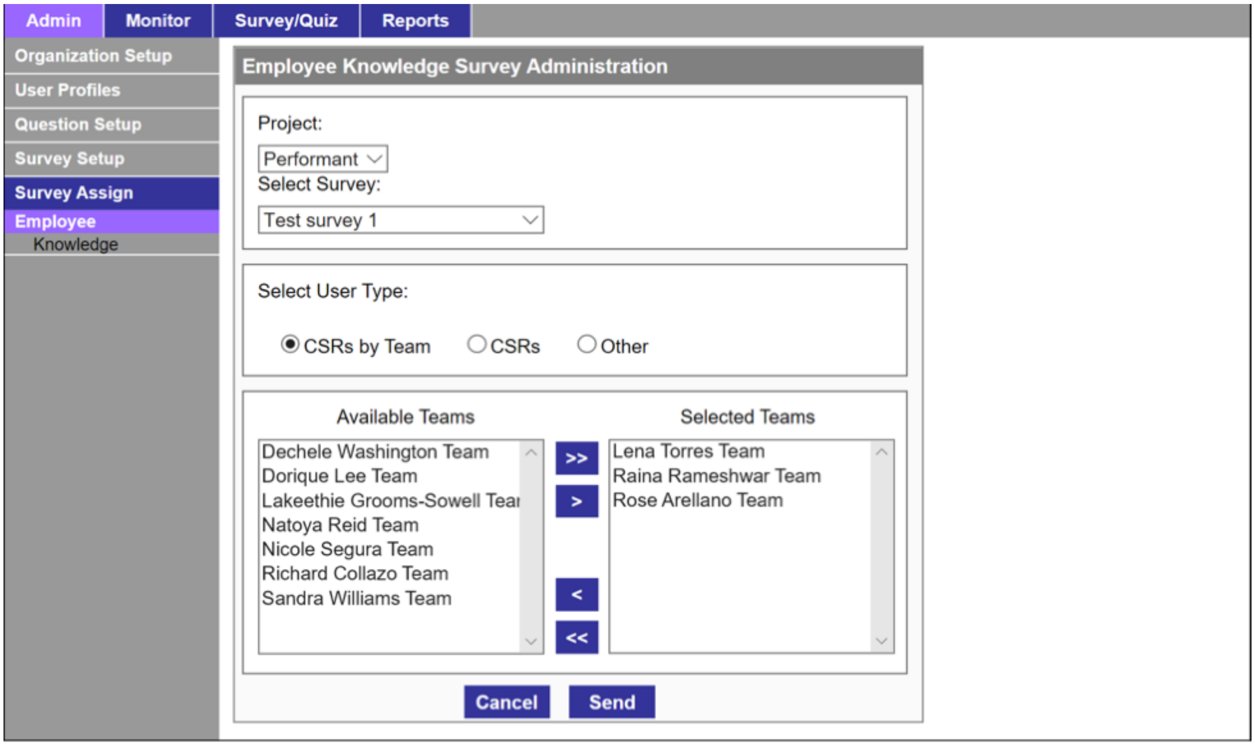
Select the questions you'd like included in the quiz and put them in the desired order. Then, use the **Project** and **KPI** selectors to assign the quiz to a project and relevant KPI. **Name** the quiz and click **Save**.



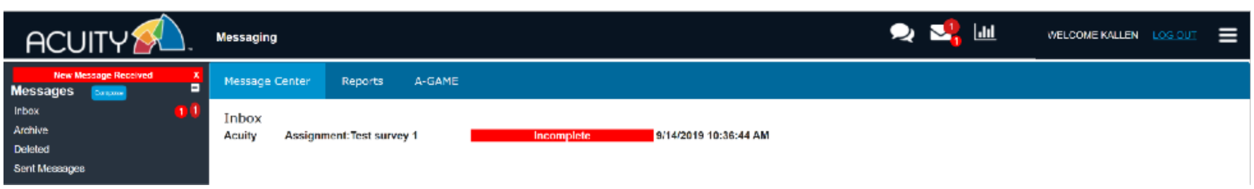
Assigning Quizzes, Surveys or Polls

When you’re ready to send your survey to recipients, click **Survey Assign | Employee | Knowledge**

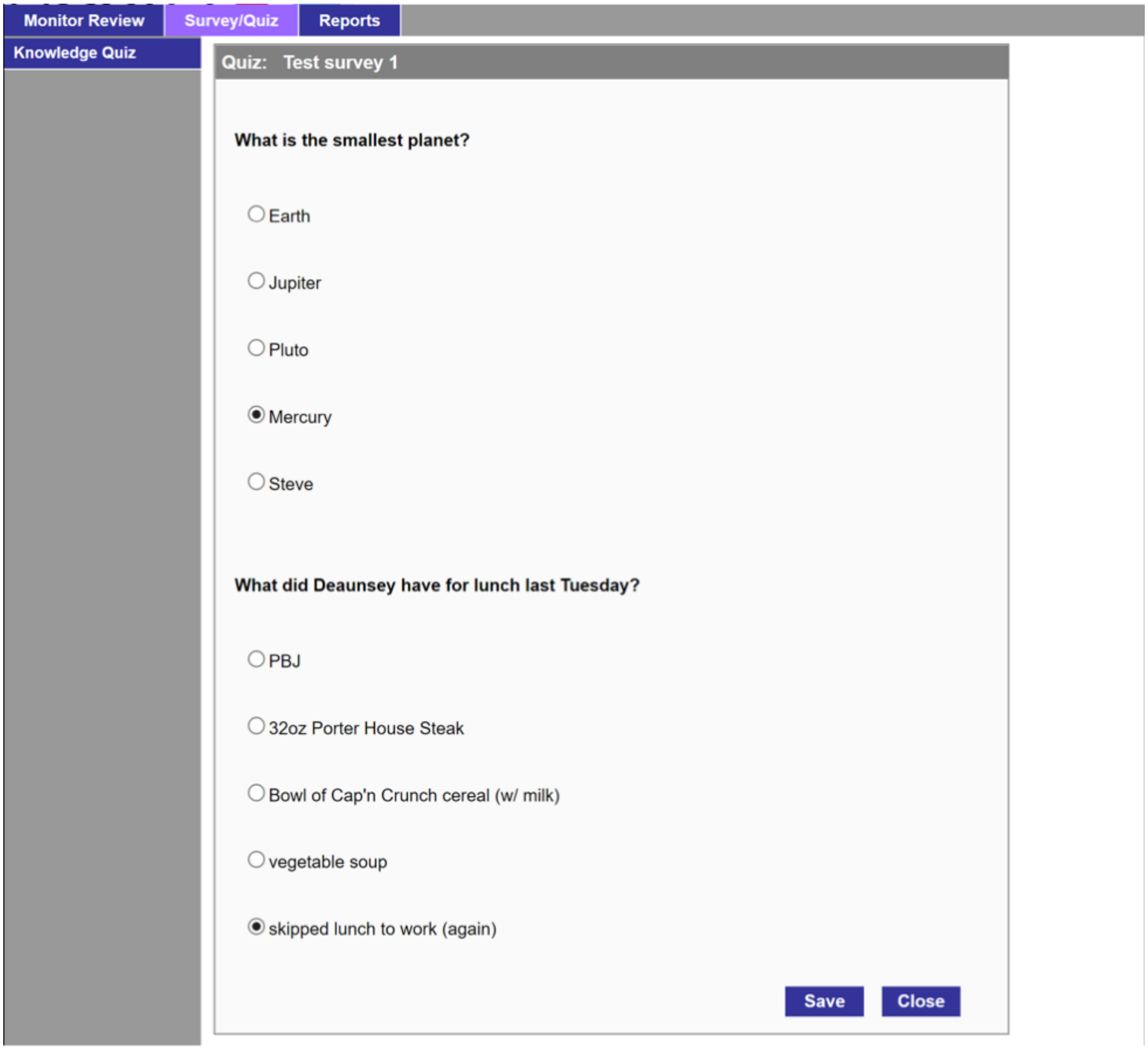
In the screen displayed, select a **Project,** the relevant **Quiz/Survey/Poll** and target recipients, then click **Send**.



Once sent, quiz recipients will receive notification in their Acuity messaging inbox.

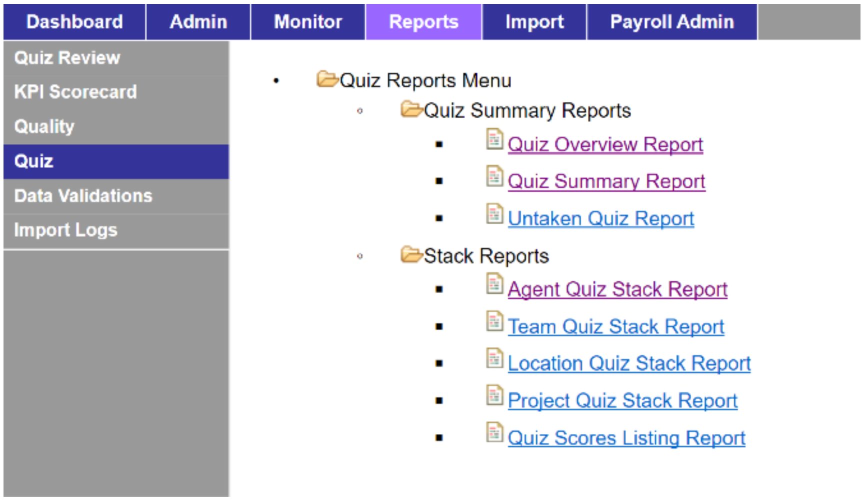


Clicking the prompts will display the Quiz to the recipient. The recipient selects answers or responses and click **Save** to submit.



Reporting - Quiz/Survey/Poll

To analyze the results of your quiz, survey and poll initiatives, go to **Admin** | **Reports** and select **Quiz** from the menu in the left panel.



Select the report you'd like to view, then specify the Project, Quiz Name, and Date Range, then click the **Table** button.