Performant Recovery Compliance User Guide

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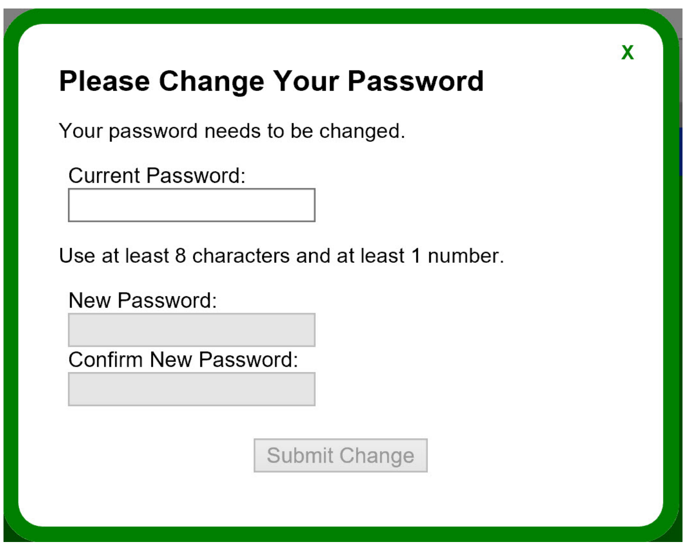
System Login

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).

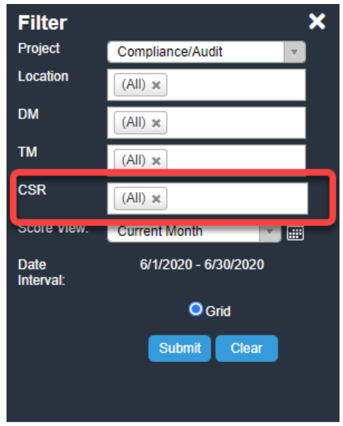


At some point during or near the end of training, you should have received a user name and a default password to access Acuity. A special URL has been set up for you to access Acuity.

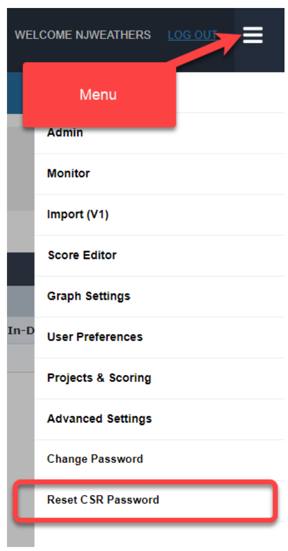
https://performant-recovery.acuityapm.com/

Password Reset

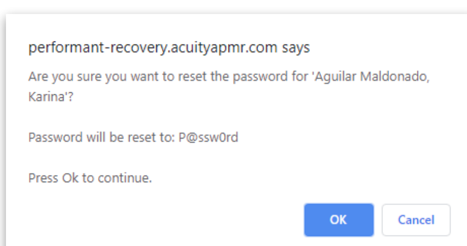
1. To reset an employee's password, first select that employee from the "CSR" filter on the left



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

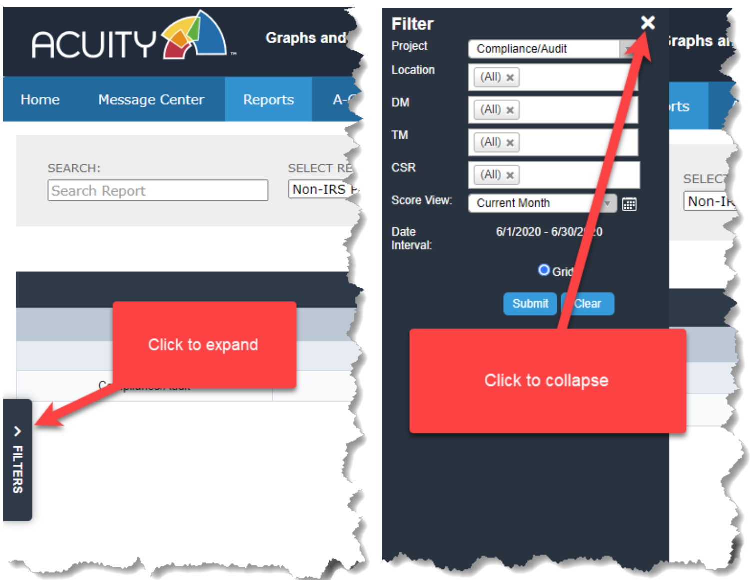
You can reach out to your supervisor by using the **Chat** feature accessible at the top of Acuity.

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.

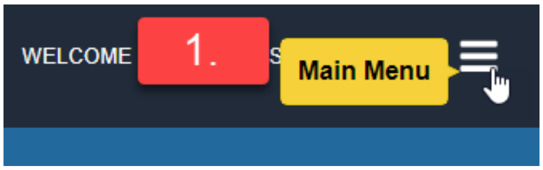
Audit Status Description

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	

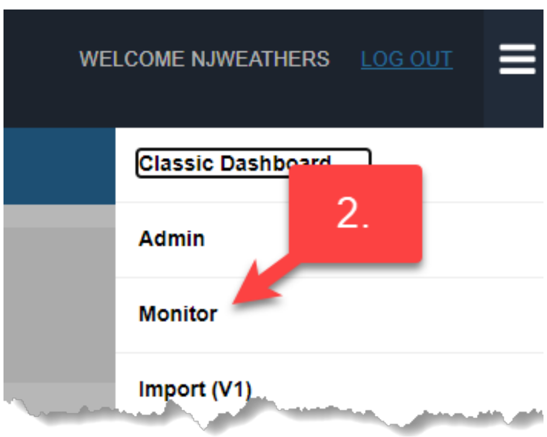
Creating a CAR Monitor Form

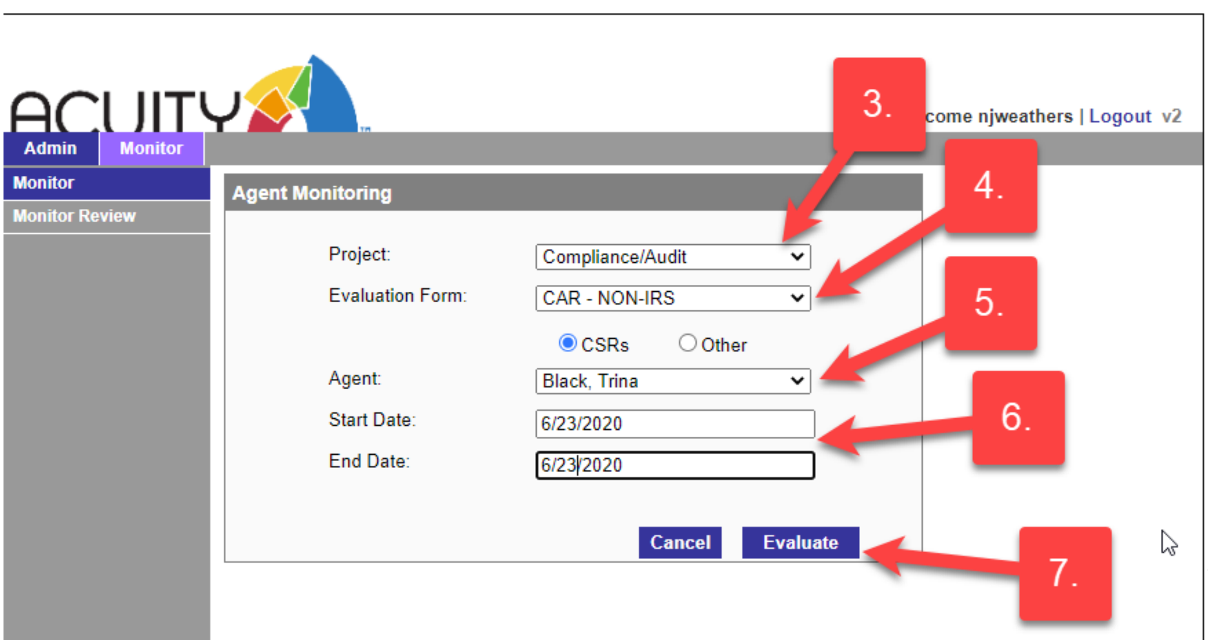
Non-IRS CAR

1. After logging into Acuity, click on the Main Menu in the upper right-hand corner.



2. Select Monitor.
3. Project – Select Compliance/Audit.
4. Evaluation Form: Select CAR – Non-IRS.
5. Agent: Select the agent from the dropdown menu.
6. Enter Start and End Date.





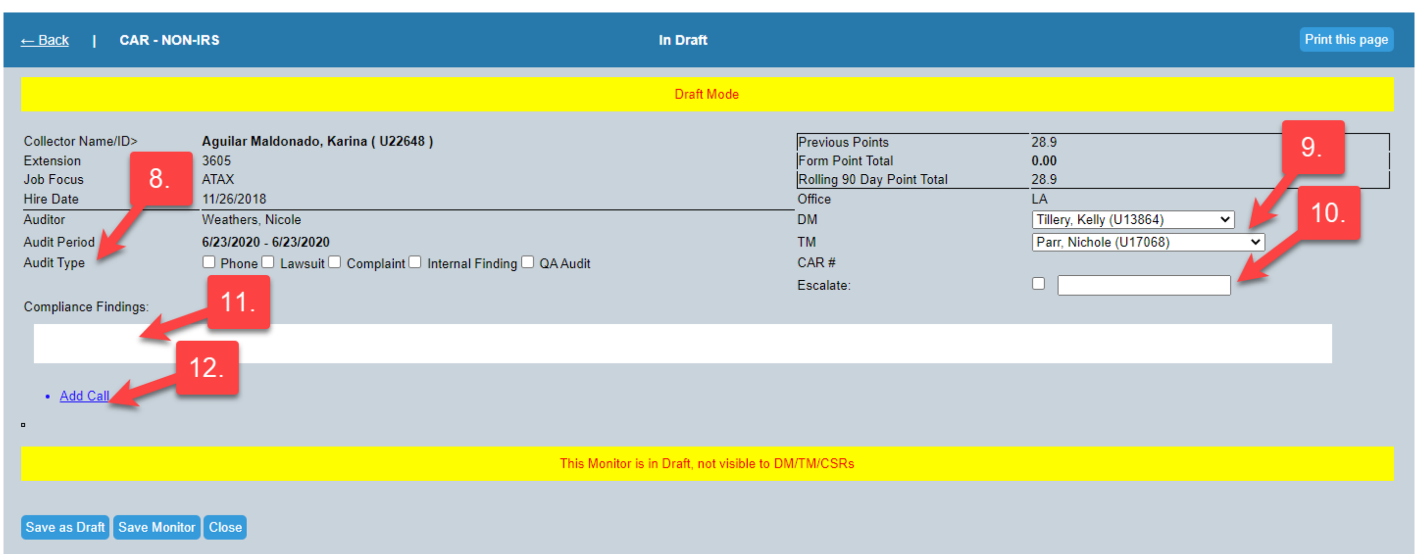
7. Click Evaluate.

A new monitor form will be displayed in Draft Mode.

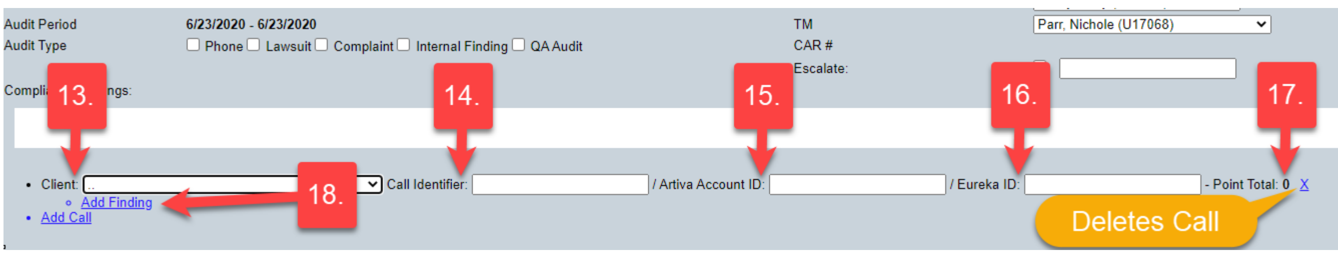
CAR Monitor Notes:

- *Draft mode allows you to save a CAR form to be updated later before sending it to the agent/manager for review.*
- *Extension, Job Focus, Hire Date, Office location, DM & TM for the agent will be pre-populated from the Collector List. The Collector List is updated daily.*
- *The Previous Points and Rolling 90 Day Point Total are calculated and displayed on the form.*
- *Form Point Total is the sum of each Call Point Total on the Form. Example: if there are 2 calls monitored on the form and each call has a Call Point Total of 2.00 the Form Point Total will be 4.00.*
- *The Call Point total is the highest point value for the finding(s) for that call. Example: there are 2 findings for a call, the first has a point value of 1.0 and the second has a value of 2.0, the Call Point total will be 2.0.*

8. Select Audit Type(s): Phone, Lawsuit, Complaint, Internal Finding, QA Audit (If QA Audit is selected, an Audit Category dropdown will appear)
9. Even though the DM and TM are pre-populated, an alternate person can be selected from the dropdown menu if one of these people are out of the office or on leave of absence.
10. Escalate: Escalations will take place outside of Acuity. The checkbox is only a flag that a CAR was escalated.
11. Compliance Findings – this is an open text box available to enter any comments.
12. Add Call: Click Add Call to open the details for the call being monitored.



13. Client: select client from dropdown menu.
14. Call Identifier.
15. Artiva Account ID.
16. Eureka ID.
17. Point Total: This is the call point total and the Form Point total (above) will initially be 0 until findings are added.
18. Click Add Finding to open the details of the findings.



19. Performant Category: Select from the dropdown menu.
20. Performant SubCategory: If a subcategory exists for the finding selected, then select it from the dropdown menu.

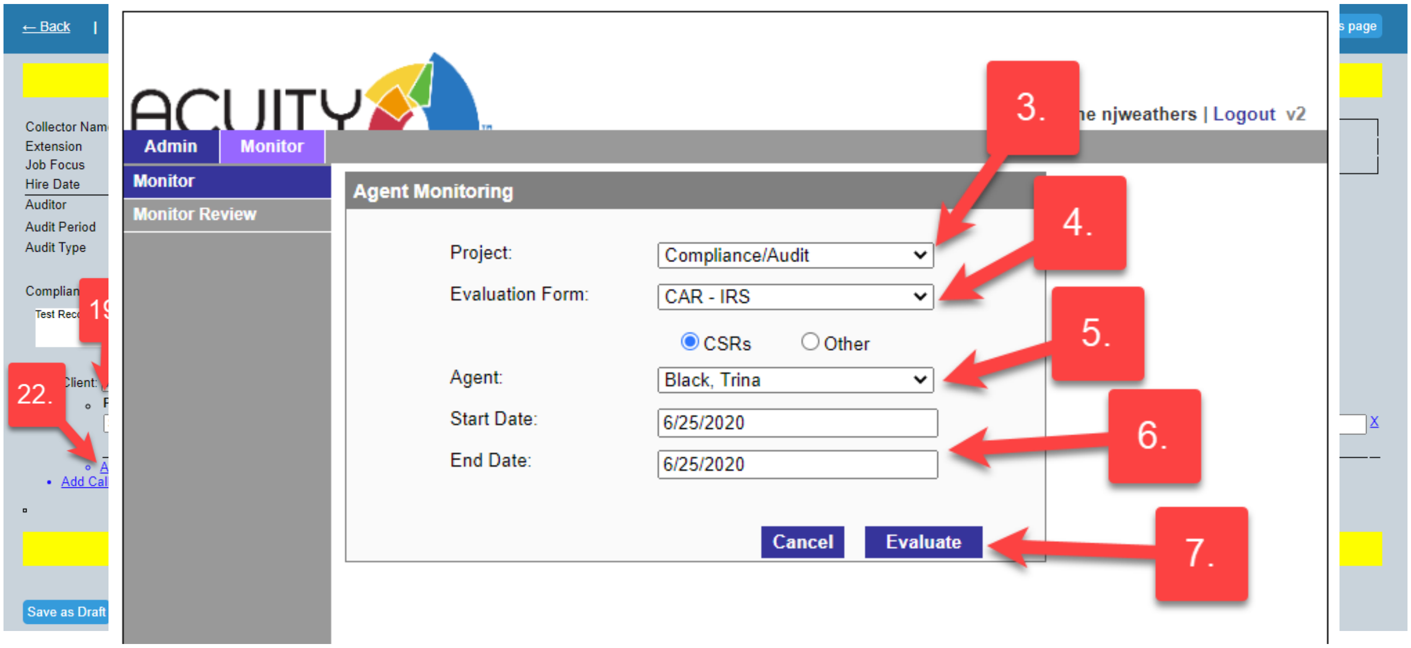
    Finding Points:

    The finding points will auto-populate once the finding is selected. The point value is an editable field. Also, the Call Point Total and Form Point Total will update.

21. Comments: Space provided for additional comments regarding the call or finding.
22. Add Finding: Click Add Finding to add additional findings for the call and repeat steps 19-21.
23. Add Call: Click Add Call to add additional calls/findings to the CAR Monitoring Form and repeat steps 13-21.
24. Save Draft to return to form later.
    -or-
    Save Monitor to release the CAR to the agent/manager.

IRS CAR

1. After logging into Acuity, click on the Main Menu in the upper right-hand corner.
2. Select Monitor.
3. Project – Select Compliance/Audit.
4. Evaluation Form: Select CAR – Non-IRS.
5. Agent: Select the agent from the dropdown menu.
6. Enter Start and End Date.
7. Click Evaluate.



A new monitor form will be displayed in Draft Mode.

CAR Monitor Notes:

- *Draft mode allows you to save a CAR form to be updated later before sending it to the agent/manager for review.*
- *Extension, Job Focus, Hire Date, Office location, DM & TM for the agent will be pre-populated from the Collector List. The Collector List is updated daily.*
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8. Select Audit Type(s): Phone, Lawsuit, Complaint, Internal Finding, QA Audit (If QA Audit is selected, an Audit Category dropdown will appear)
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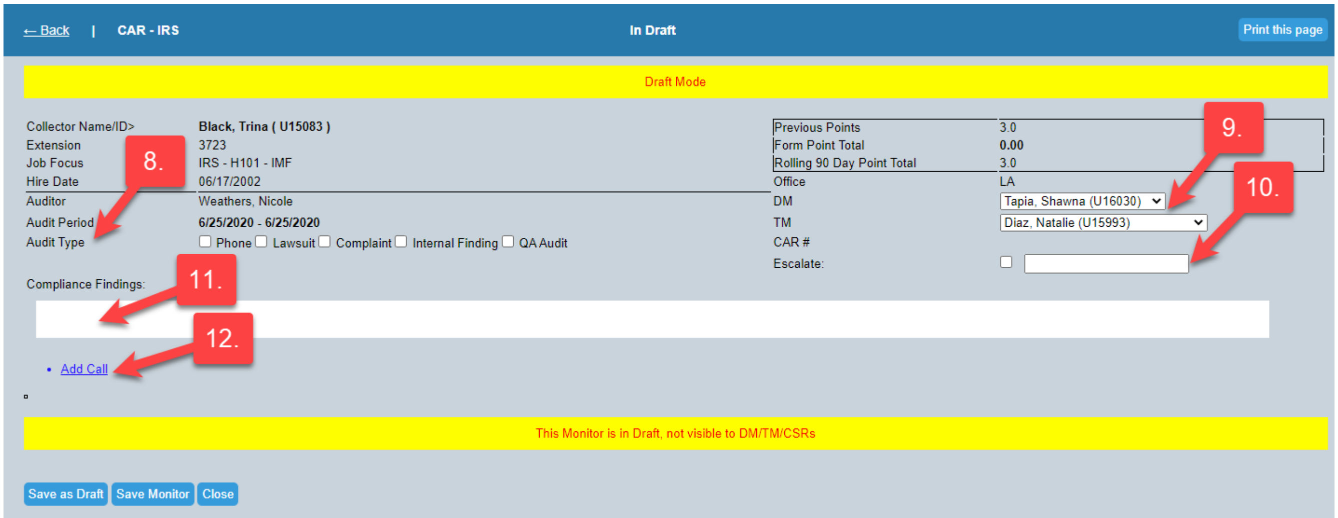
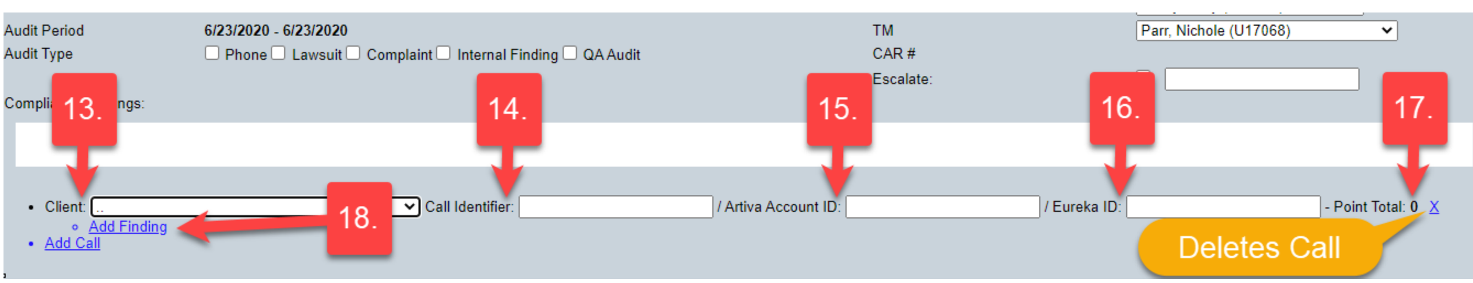


13. Client: select client from dropdown menu.
14. Call Identifier.
15. Artiva Account ID.
16. Eureka ID.
17. Point Total: This is the call point total and the Form Point total (above) will initially be 0 until findings are added.
18. Click Add Finding to open the details of the findings.



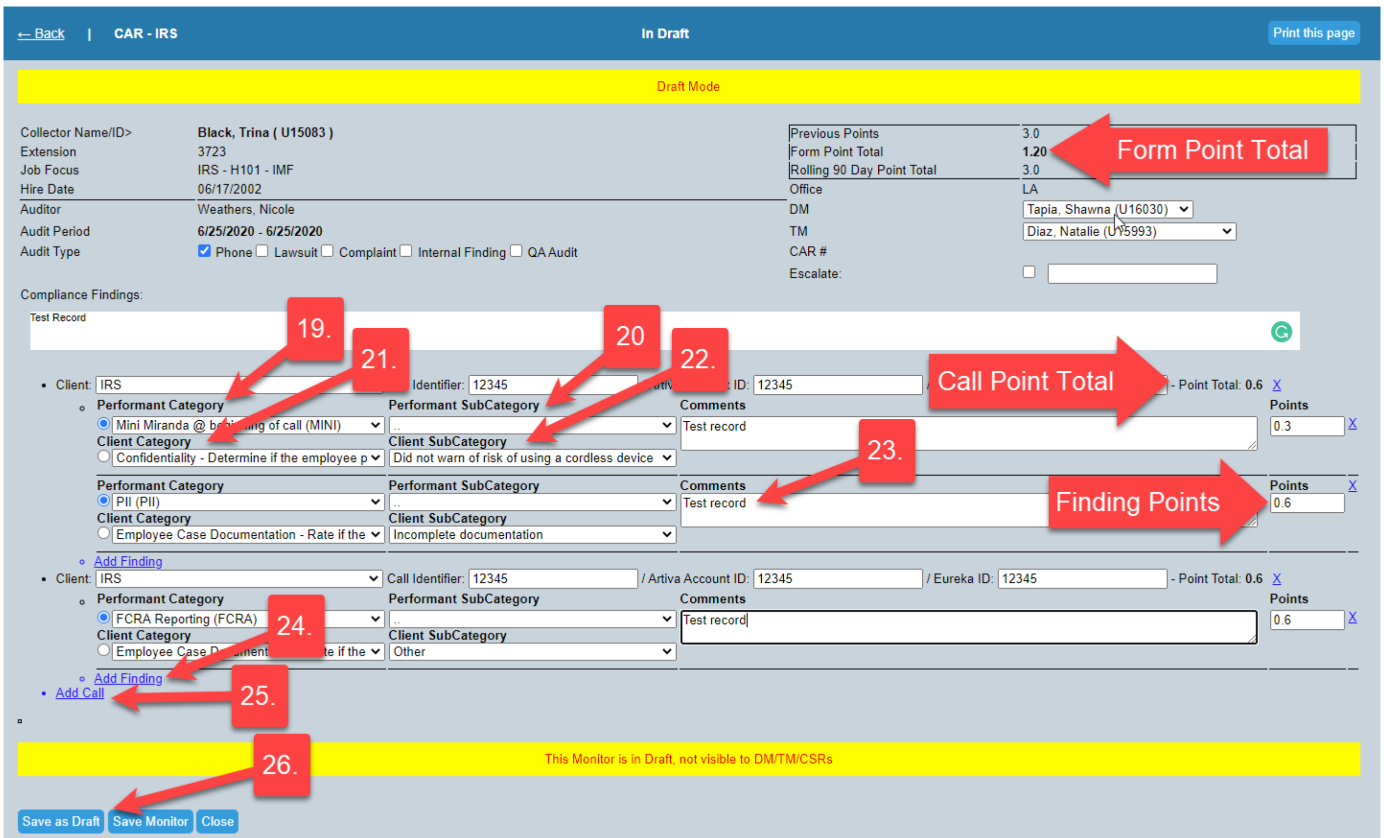
19. Performant Category: Select from the dropdown menu. *Note: The finding points will auto-populate once the finding is selected. Also, the Call Point Total and Form Point Total will update.*
20. Performant SubCategory: If a subcategory exists for the finding selected, then select it from the dropdown menu.
21. Client Category: Select from the dropdown menu.
22. Client SubCategory; If a subcategory exists for the finding selected, then select it from the dropdown menu.

Finding Points:

- ***The finding points will auto-populate once the finding is selected. The point value is an editable field. Also, the Call Point Total and Form Point Total will update.***

- ***The radio button to the right of the Performant Category or Client Category will determine which category takes precedence for the finding points.***

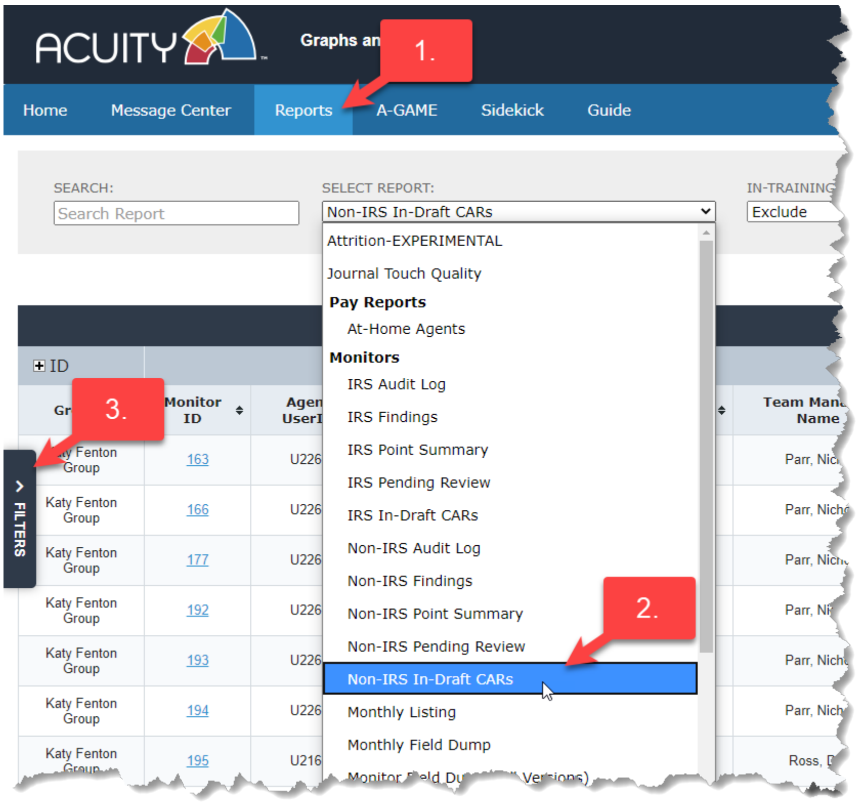
23. Comments: Space provided for additional comments regarding the call or finding.
24. Add Finding: Click Add finding to add additional findings for the call and repeat steps 19-23.
25. Add Call: Click Add Call to add additional calls/findings to the CAR Monitoring Form and repeat steps 13-23.
26. Save Draft to return to form later.
    -or-
    Save Monitor to release the CAR to the agent/manager.



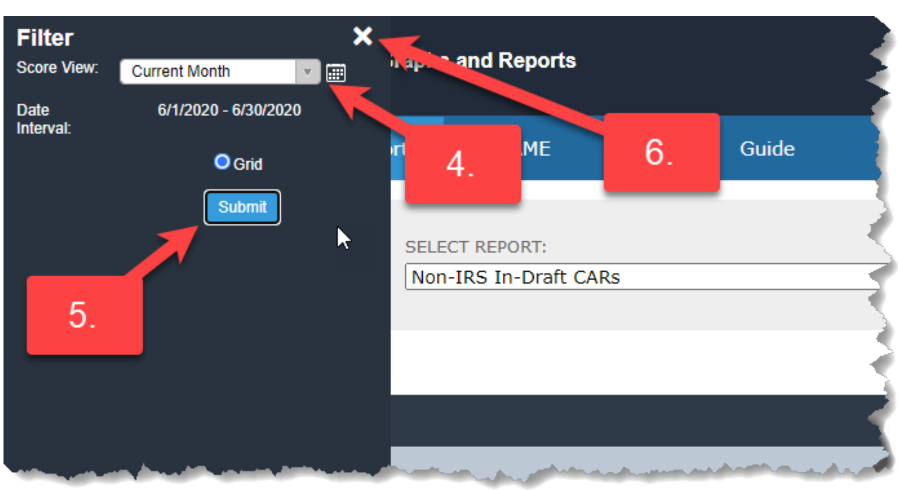
Completing CARs in Draft Mode

To review the Audit Monitoring Forms that are in draft, select the IRS or Non-IRS In-Draft CARs report.

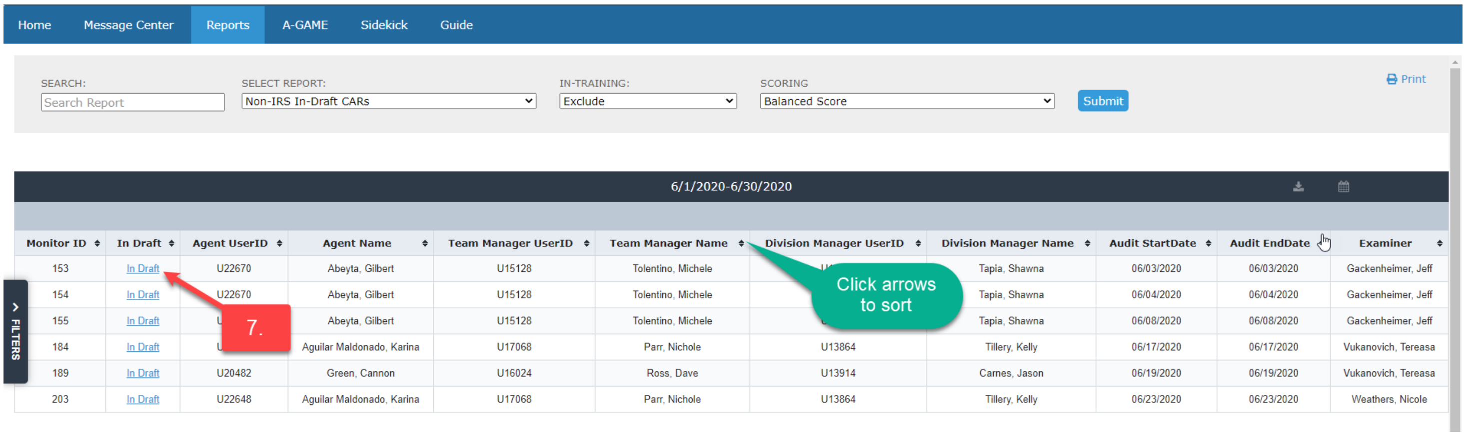
1. Click on the Reports tab.
2. Select IRS or Non-IRS In-Draft CARs report from the dropdown menu.
3. Click on Filters to expand the Filter panel.



4. In the Filter panel, 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 in Draft mode.
6. Click on the X to collapse the Filter panel. The report will be displayed in the window.



7. Click on the In Draft link to open the CAR monitoring form.



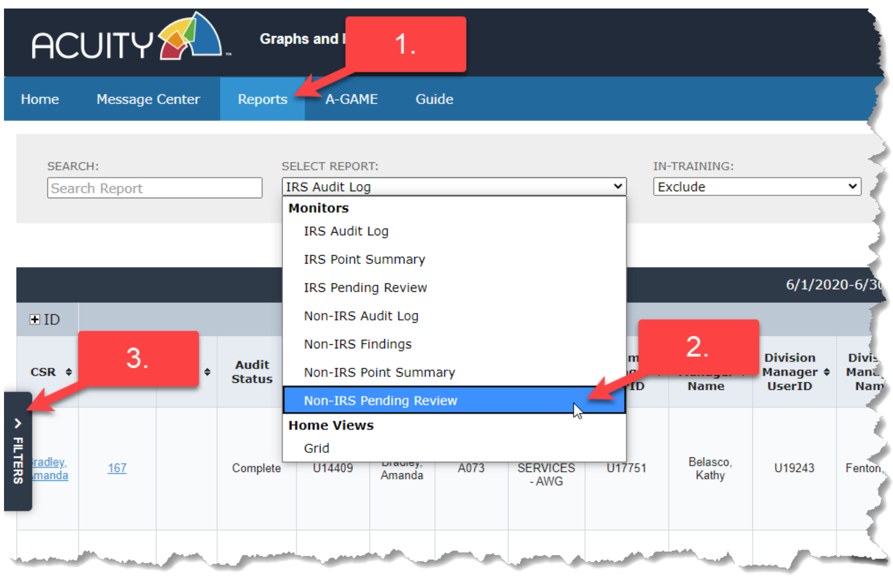
8. To complete the form and release it to the agent/manager, follow the steps in the Creating a CAR Monitoring Form section.

Reviewing Audit Monitoring Forms

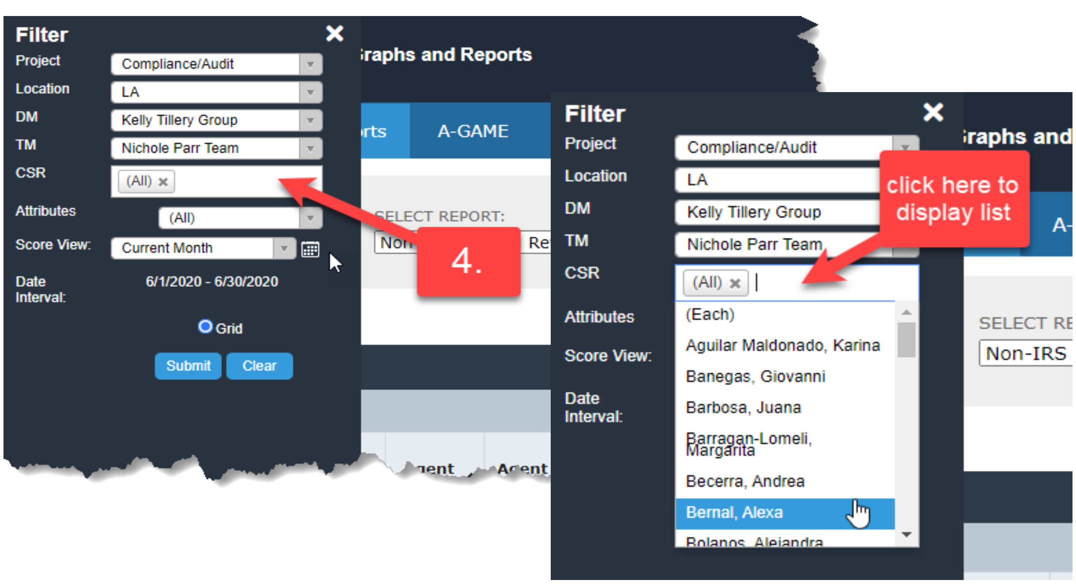
Pending Compliance Review

Select individuals on the Compliance Team will review disputed CARs. To review the Audit Monitoring Forms that are Pending Compliance Review, 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 Filter to expand the Filter panel.



4. Data can be filtered by location, DM, TM or CSR. "All" will return the results for all locations, DMs, TMs or CSRs.
   a) "All" will list the pending CARs for all locations, DMs, TMs or CSRs.
   b) To view report for a specific data set, click in the white space next to "All" to display the dropdown list.



5. Select the Score View (date range). To select the date range, click on the dropdown menu.
6. 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 Compliance Review
7. Click on the X to collapse the Filter panel. The report will be displayed in the window.

8. Click on the Monitor ID # to open the CAR monitoring form with the status Pending Compliance Review to open the CAR.

6/1/2020-6/30/2020

ID

Team	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
Nichole Parr Team	163	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	[illegible]	Tillery, Kelly	06/15/2020	06/15/2020	Gackenheimer, Jeff	Pending Corrective Action
Nichole Parr Team	166	[illegible]	Aguilar Maldonado, Karina	U17068	Parr, Nichole	[illegible]	Tillery, Kelly	06/16/2020	06/16/2020	Gackenheimer, Jeff	Pending Corrective Action
Nichole Parr Team	177	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	U13864	Tillery, Kelly	06/10/2020	06/10/2020	Weathers, Nicole	Pending Agent CAR Confirmation
Nichole Parr Team	192	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	U13864	Tillery, Kelly	06/21/2020	06/21/2020	Weathers, Nicole	Pending Corrective Action
Nichole Parr Team	193	U22648	Aguilar Maldonado, Karina	U17068	Parr, Nichole	U13864	Tillery, Kelly	06/11/2020	06/11/2020	Weathers, Nicole	Pending Agent CAR Confirmation

9. Compliance Response options:

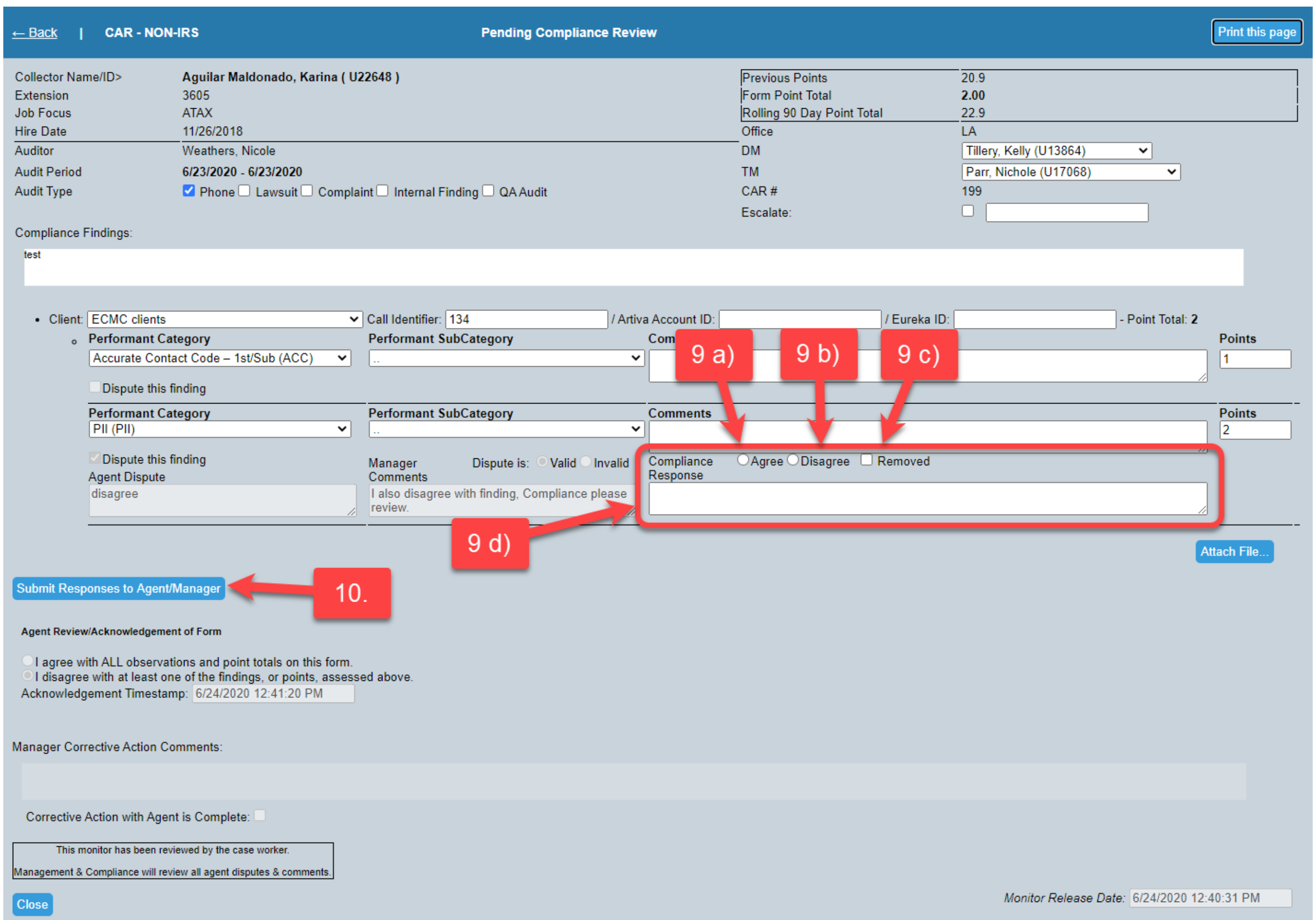
    a) Agree – check to agree with the dispute.

    b) Disagree – check to disagree with the dispute.

    c) Remove – check to remove the finding. If the finding is removed, the points for the finding will be removed and the Call Point Total and the Form Point Total will be updated accordingly.

    d) Compliance Response text box is required.

10. Submit Response to Agent/Manager. Once complete, the CAR's status will be Pending Corrective Action (even if the finding(s) were removed). The manager will perform the Corrective Action. If the findings were removed, it will serve as notification to the manager/agent with the outcome of the dispute review.



Reports

Report Menu

Reports are enabled or disabled based on the user's role and permissions. The following are the reports available to managers:

Monitors

- **IRS or Non-IRS Audit Log** – this is a list of all 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.

Sidekick

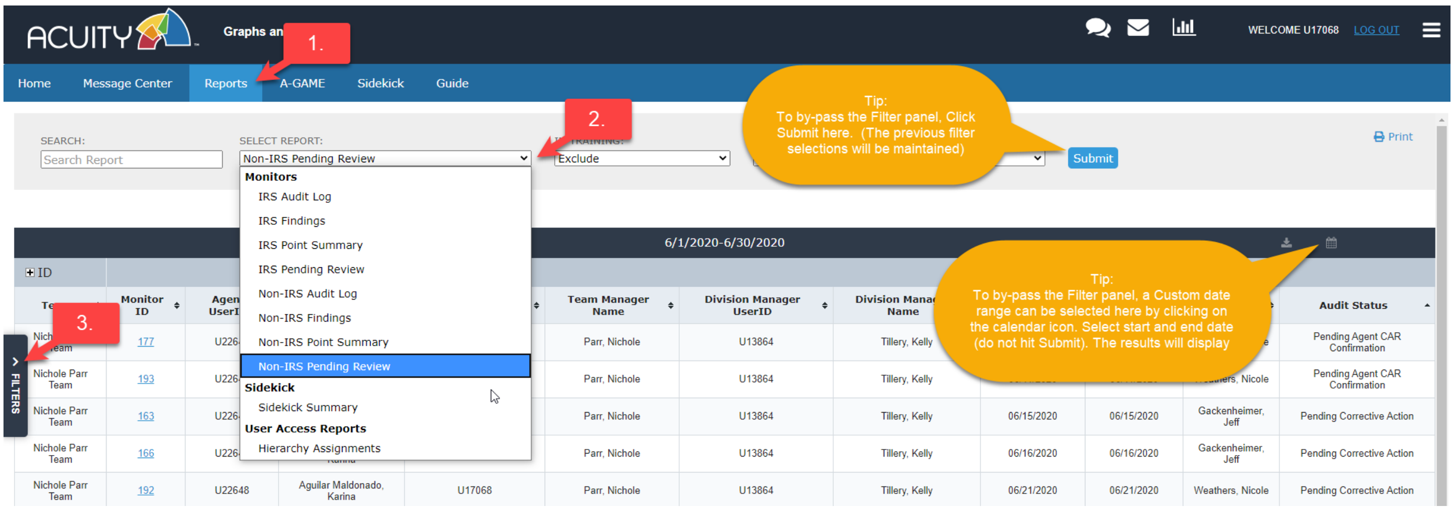
- **Sidekick Summary** – Supervisor coaching & agent support system

User Access Reports

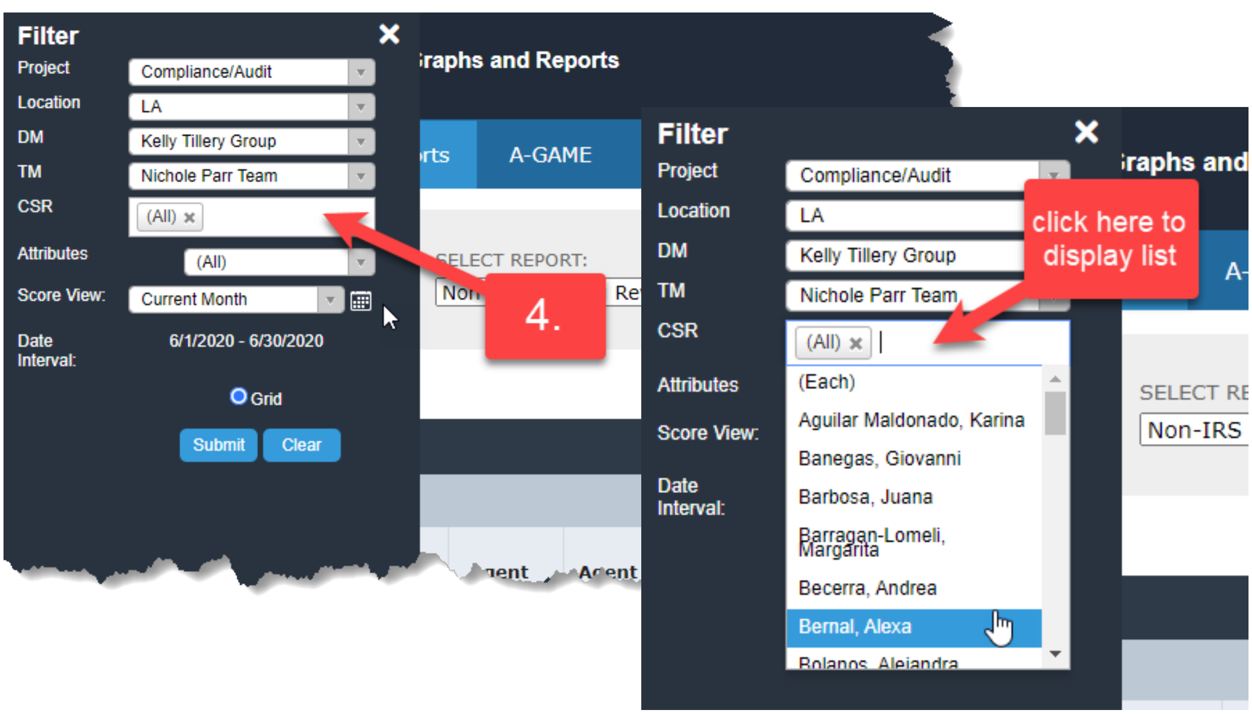
- **Hierarchy Assignments** – Displays team information

Report Generation:

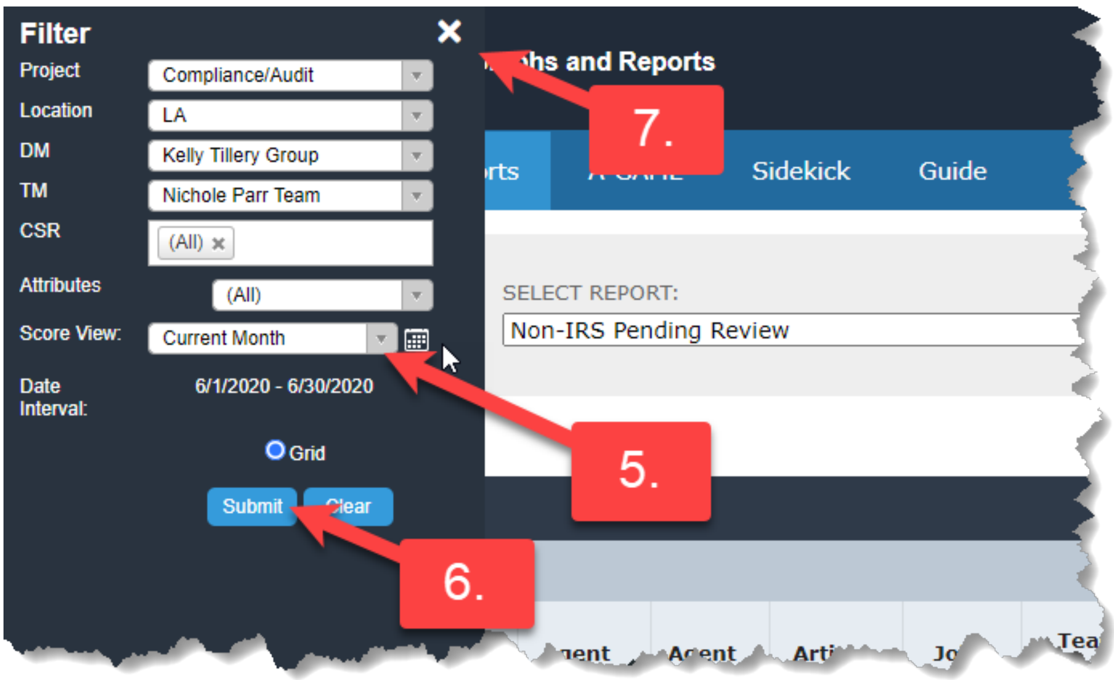
1. Click on the Reports tab.
2. Select the report from the drop-down menu.
3. Click the Filters tab to expand the Filter Panel. *Note: Project, Location, DM, TM, and CSRs will be pre-populated based on hierarchy.*



4. Select the CSR.
   - "All" will list the pending CARs for all the CSRs.
   - To view report for a specific CSR, click in the white space next to "All" to display the list of CSRs.

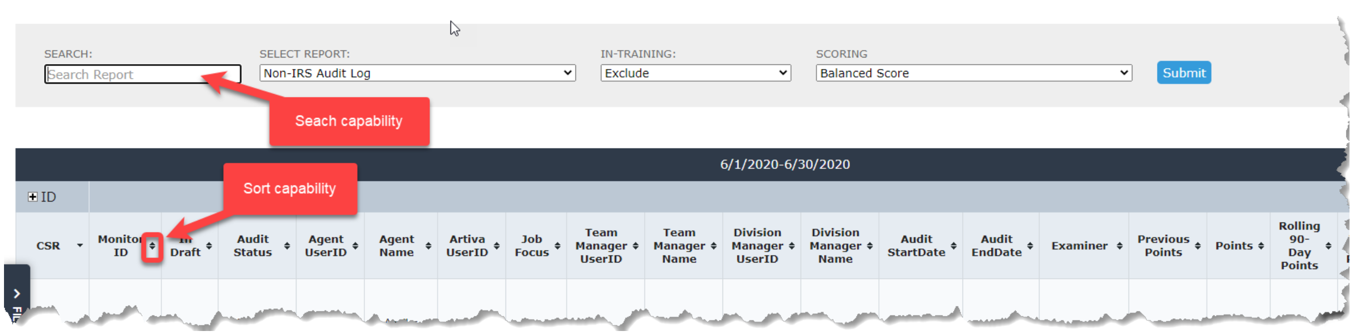


5. Select the Score View (date range). To select the date range, click on the dropdown menu.
6. Click Submit to run the report.
7. Click the X to collapse the Filter panel. The report results will be displayed in the window.



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.



Sidekick - Digital Ally for the Frontline Superhero

Sidekick is an intelligent system for coaching, recognition, review, and performance management integrated with the Acuity contact center performance management platform.

Using Sidekick is Easy...

Accessing Sidekick

1. Log into Acuity.
2. **Select** an **agent** from the CSR (or similar label) drop down.
3. Click **Sidekick** from the menu and it will load in the context of the selected agent.

The Sidekick Journal

The Sidekick Journal provides a place to document all of the interactions, such as coaching, recognition, monitors, goal-setting, etc., between team leaders (aka supervisors, etc.) and their agents. Adding journaling to your regular frontline management routine will ensure that you never have to guess with whom or in what ways you've lead and developed your team. The Journal is your reliable digital system of record.

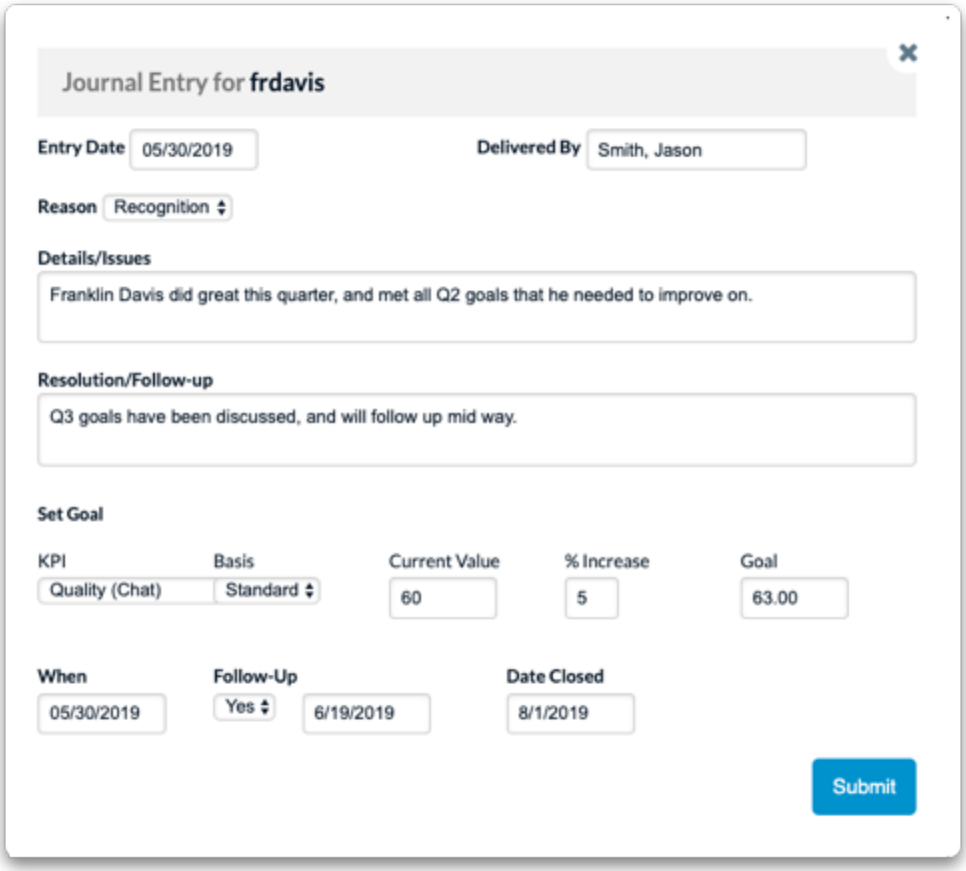
Using the Journal is easy. By default, journal entries are listed in table format by Entry Date (most recent on top). Columns are sortable so that this view can be adjusted as desired.

Journal — Add New Record

User	Date	Delivered By	Reason	Date Closed	Follow Up Date	
KAmador	03/04/2019	GL	Coaching	3/4/2019	3/29/2019	
KAmador	03/11/2019	GL	Call Monitor			
KAmador	04/10/2019	GL	Coaching	4/17/2019	4/17/2019	
KAmador	04/18/2019	GL	Recognition			
KAmador	05/24/2019	GL	Recognition	5/24/2019	5/31/2019	

Adding a Journal Entry

As you prepare to initiate a coaching session or other form of support interaction with an agent, click the blue **Add New Record** button located in the top right corner of the Journal.

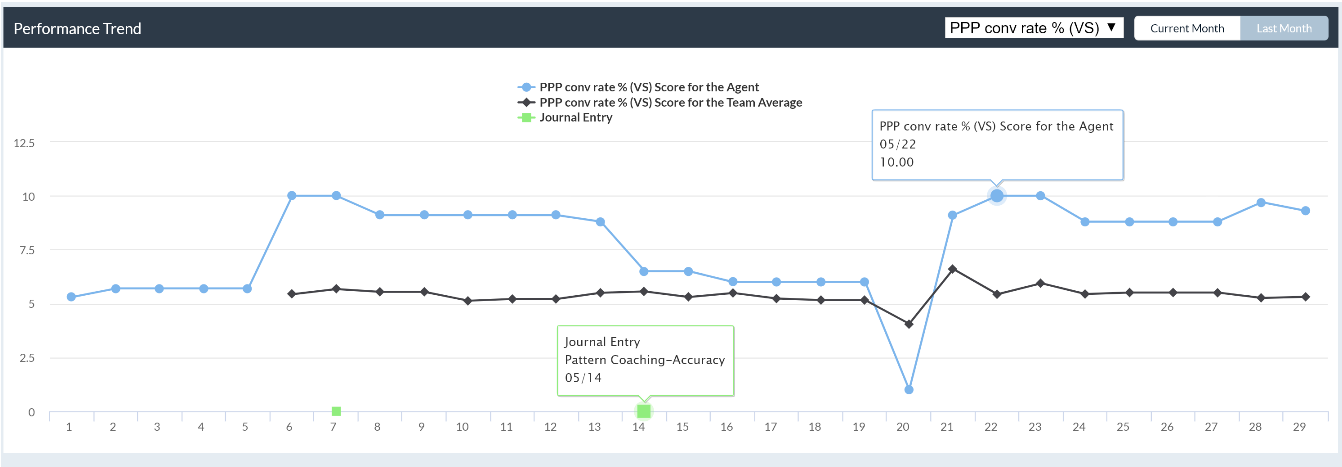


1. Fill in the **Entry Date** (current or past) and Delivered By fields.
2. Select a **Reason** or Category of support type: **Coaching, Recognition, Goal-setting**, and **Call Monitor** are defaults, but other options may be presented.
3. Enter notes/comments in the **Details/Issues** and **Resolution/Follow-up** fields to adequately document the support activity.
4. If applicable, specify details for performance Goals in the **Set Goal** section per the relevant KPI and a date for **Follow-up.**
5. Once the form is complete, click the **Submit** button and the new entry will appear in the Journal table.

Performance Trend

The Performance Trend displays the day-by-day performance scores by Balanced Score or specific KPI for either the Current or Last Month. The Performance Trend view also includes all of the journal entries recorded that same month. In this way, it's easy to visualize the impact of your agent support activities.

Trend lines display performance for the focus agent as well as the team average. Mouse-over the dots on the black or blue trend lines will display details about the KPI or Balanced Score. Mouse-over the green dots on the x axis will display the summary for the Journal entry. Clicking the green dot will open the full Journal entry.

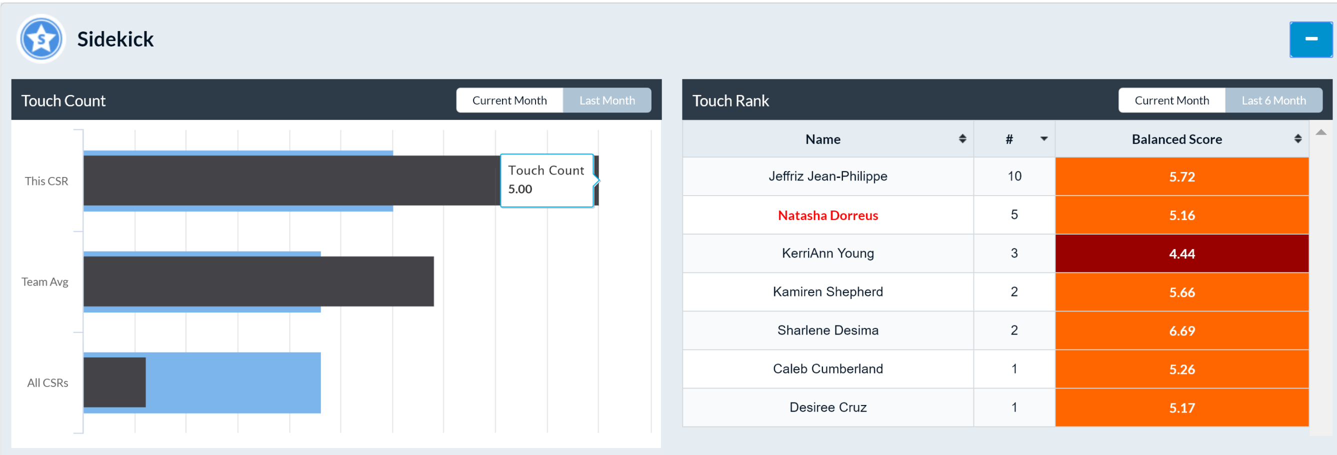


Touch Count / Touch Rank

Touch Count:

Touch Count and Touch Rank reports provide context about the frequency of your interactions with agents and how this routine correlates with performance. Touch Rank looks at three data points:

1. **This CSR:** Mouse-over the black bar shows the number of interactions ("touches") with the focus agent in the current month. Mouse-over the blue bar shows the average number of touches for the focus agent up to the past six months.
2. **Team Average:** Mouse-over the black bar shows the average number of interactions ("touches") across all agents on the team. Mouse-over the blue bar shows the average number of touches across all agents on the focus team for up to the past six months.
3. **All CSRs:** Functions just like Team and This CSR, but across all CSRs within the same department, program, or other comparable group.

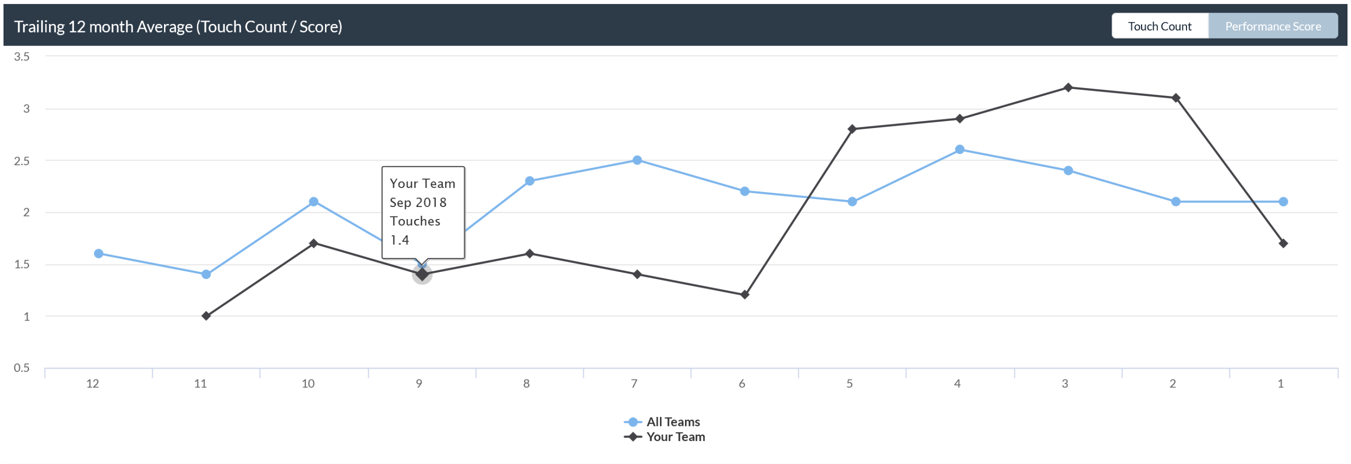


Touch Rank:

Touch Rank displays the number of "touches" and Balanced Score for each of the agents on the specified team. The focus agent is highlighted in red. The second column shows the number of touches (supervisor/ team lead support interactions). The third column displays the Balanced Score (total performance score reflective of all weighted KPIs). Each column can be sorted to customize the view or be adjusted by Current and Last Month.

Trailing Twelve Month (TTM) Average - Touch Count/Performance Trend

The Trailing Twelve Month trend chart displays the average Touch Count per agent over the most recent 12 month period. The black line reflects the focus team and the blue line reflects the average across all teams performing the same or similar function. The view can be adjusted to display the Trailing Twelve Month Performance Score (Balanced Score) for the focus (Your) or All Teams using the toggle switch at the top right corner of the chart.

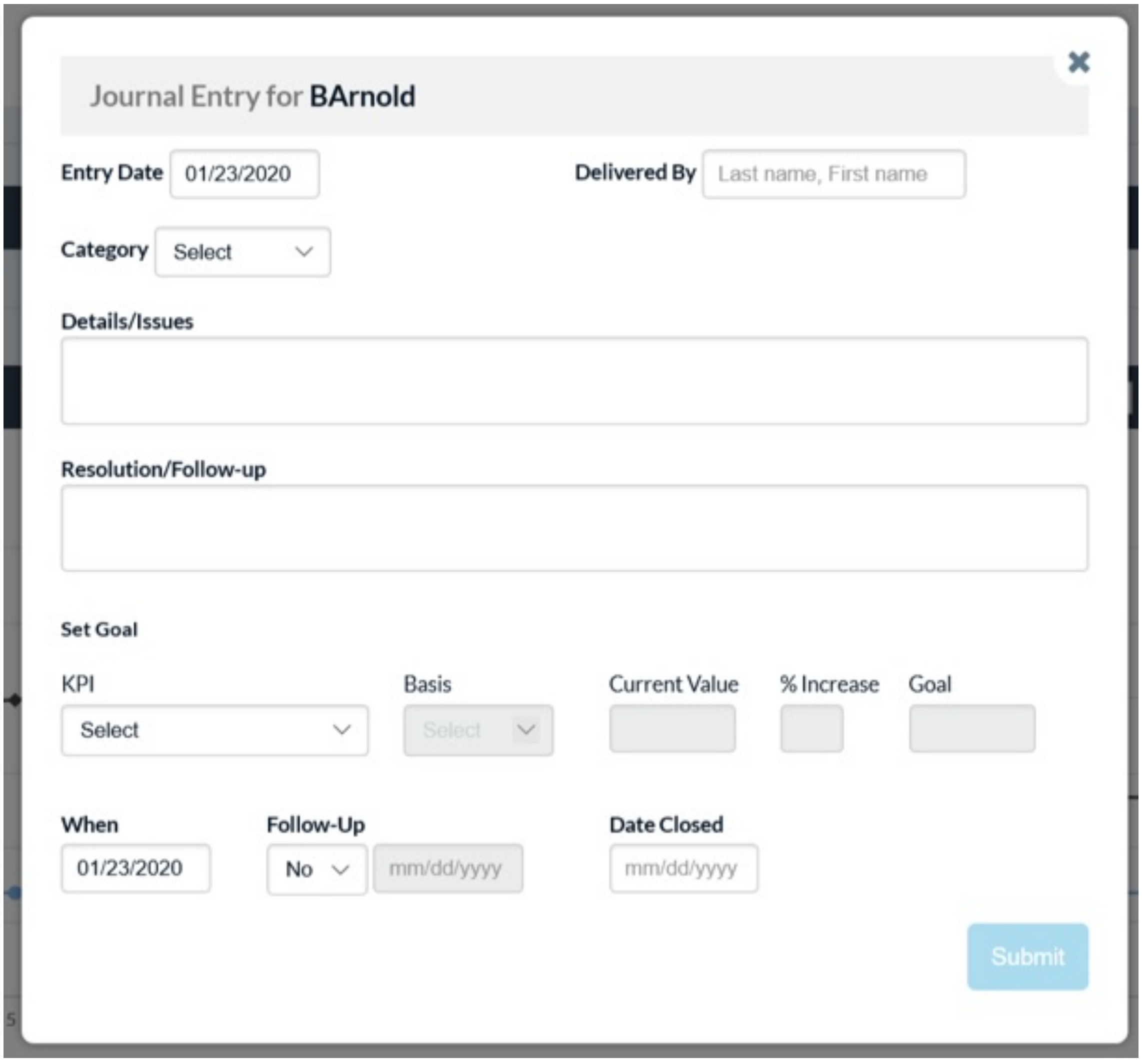


Sidekick Touch Quality

The new Sidekick Touch Quality feature provides supervisors with real-time insight into the support quality delivered to their agents. Touch Quality allows employees to anonymously rate each one of their interactions with their supervisor on a scale from 1 to 5. The addition of Touch Quality to the Sidekick support system produces a continuous measure of employee satisfaction and ensures the integrity of support delivery.

Touch Quality Workflow

1. Touch Quality is a process that takes place after a Sidekick Journal entry has been completed by a supervisor for one of their agents



2. Once a journal entry has been submitted for an agent, an automatic notification is sent to the agent to acknowledge and anonymously rate that interaction with their supervisor

    a. The automatic notification will be received via the message center inside of Acuity, which can be accessed by clicking the Envelope Icon or clicking "Message Center" and opening the notification message

    b. The notification message will include the following information (also pictured below):

        i. Date the journal entry was submitted

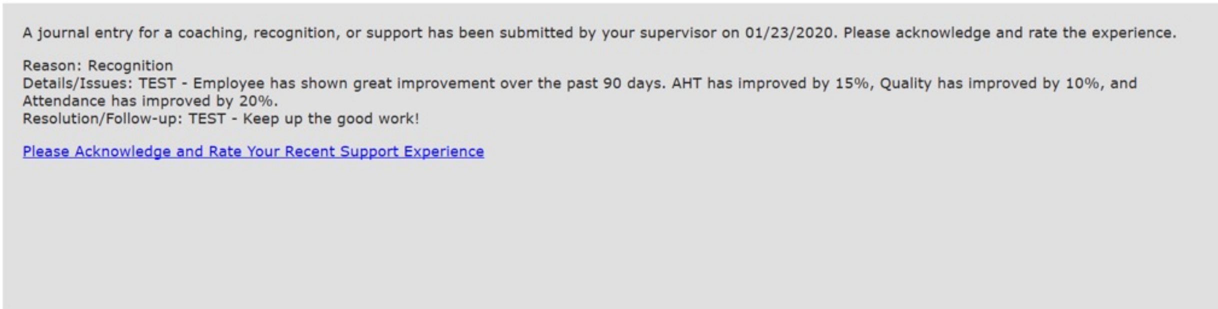
        ii. Reason for the entry (example: Coaching or Recognition)

        iii. Details or Issues that were discussed (areas of opportunity)

        iv. Resolution or Follow Up notes (action plan)

        v. Any goals that were set (Note: if no goals were set, no data will appear)

vi. Link to rate the recent support experience

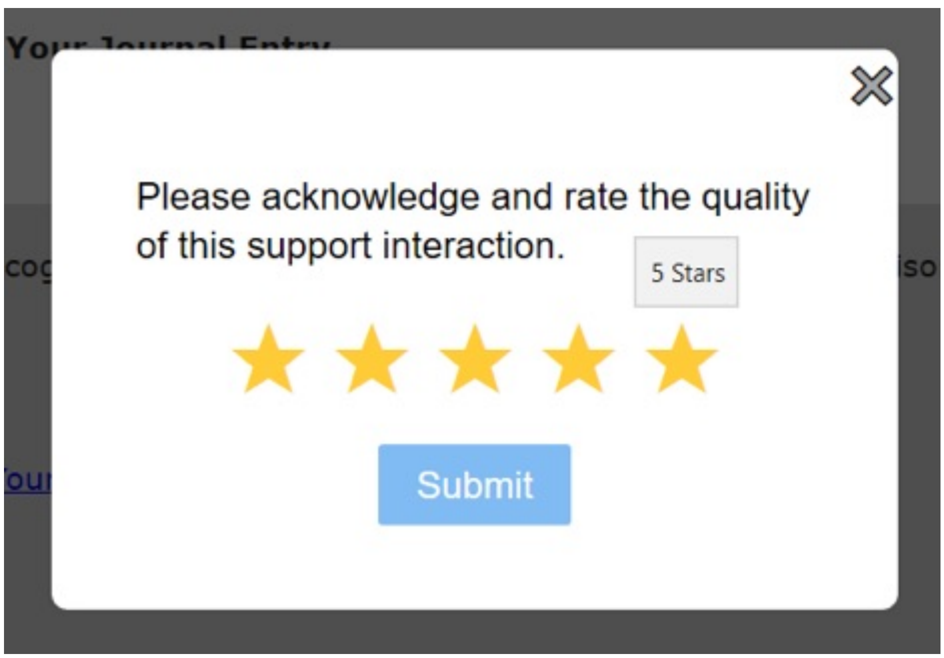


A journal entry for a coaching, recognition, or support has been submitted by your supervisor on 01/23/2020. Please acknowledge and rate the experience.

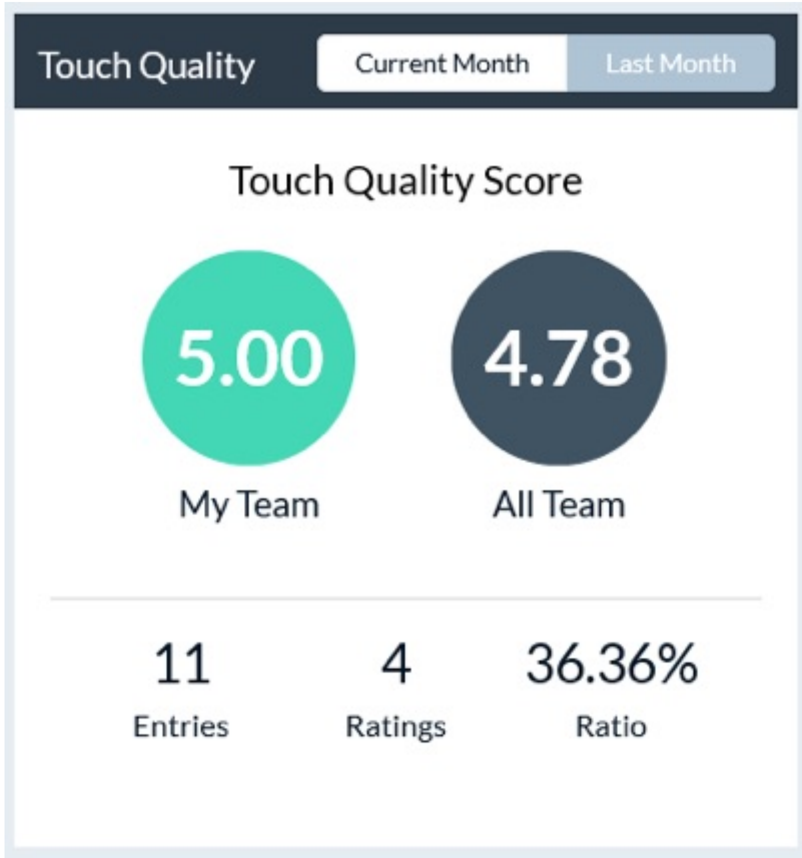
Reason: Recognition
Details/Issues: TEST - Employee has shown great improvement over the past 90 days. AHT has improved by 15%, Quality has improved by 10%, and Attendance has improved by 20%.
Resolution/Follow-up: TEST - Keep up the good work!

Please Acknowledge and Rate Your Recent Support Experience

3. To rate the interaction, agents will simply click the blue link that reads, "Please Acknowledge and Rate Your Recent Support Experience" which will open a window that allows the employee to select between one and five stars to rate the interaction
    a. NOTE: ALL RATINGS ARE ANONYMOUS TO SUPERVISORS



4. Once ratings are submitted, supervisors and managers will be able to track their Touch Quality scores through the Sidekick page, using the Touch Quality chart



a. The "My Team" score is the average score of all ratings received for the selected supervisor's team during the chosen date range
    i. There are currently two date range options: Current Month and Previous Month
b. The "All Team" score is the average score of all ratings received for all teams assigned to the selected Project
    i. This provides supervisors and managers with the ability to compare employee satisfaction against multiple teams, and the average for all teams
c. Additional information is provided along the bottom of the graph, which includes the number of entries (journal entries submitted), number of ratings (how many of the entries have been acknowledged and rated), and the ratio (Ratings / Number of Entries)