Acuity Performance Management System - Quick Start Guide

Acuity is designed to inform, align, engage and develop agents, mangers and other employees. It's easy to use and has a range of great features to help you succeed! This guide will help you become familiar with the system and become proficient in its basic operation.

System Login

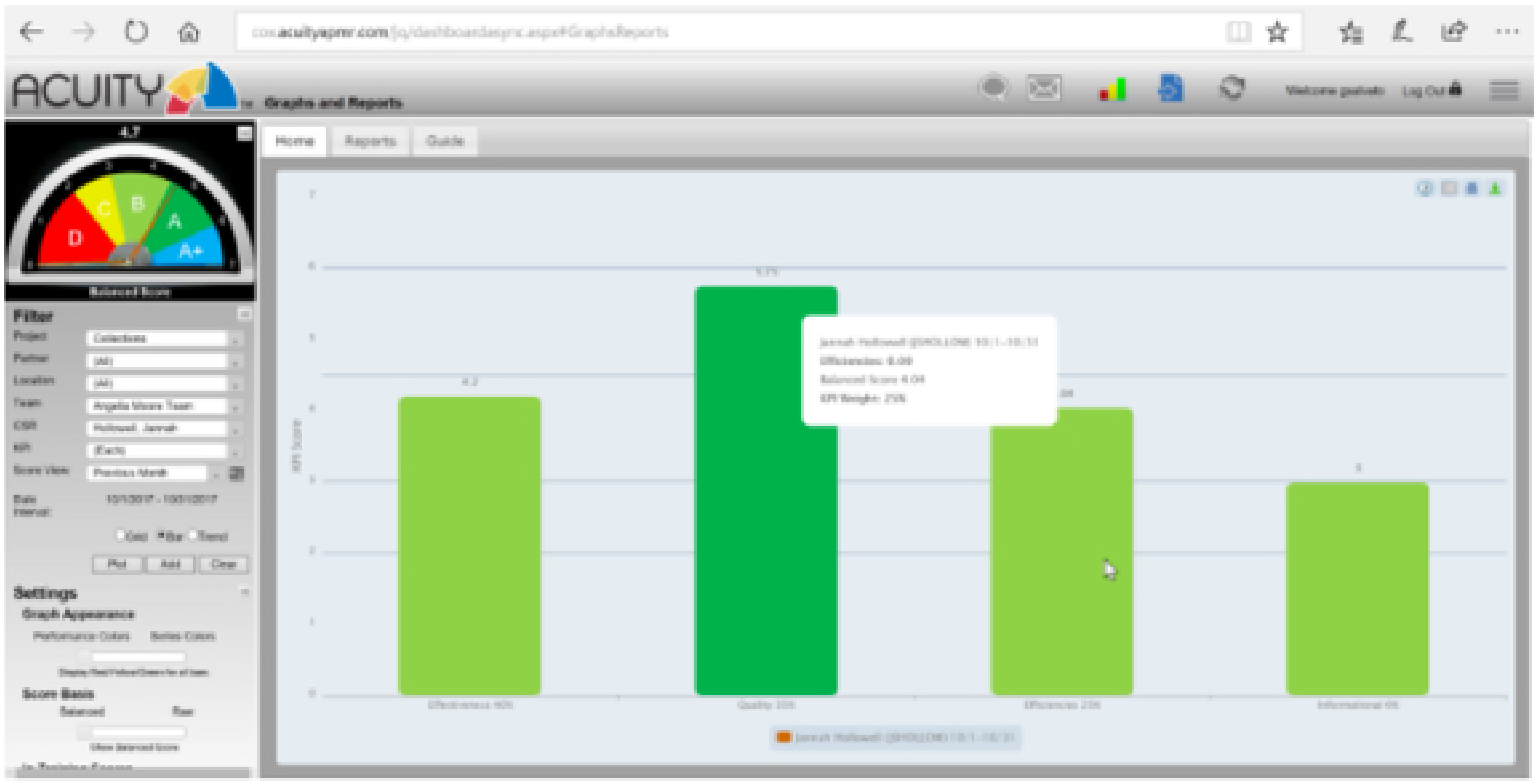
When you login for the first time (simply enter the user name and password into the appropriate fields as shown in the screen shot above), you will be prompted to change the default password (typically **P@ssw0rd**) to one of your own (remember it or store it somewhere safe for future reference should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

Dashboard Basics

Once logged in to Acuity, a dashboard will display your performance scores (actual data values as well as corresponding performance scores and levels).



The number on the top of the gauge in the upper left section of the filter panel indicates your current overall aka "balanced score" (refreshed at least daily). The gauge is divided into color-coded performance levels and scoring resets with the start of each pay period or other defined basis.

Each KPI for which you are responsible, and that make up the balanced score, is displayed so that you can quickly and easily monitor progress and pinpoint your strengths and areas that require improvement.

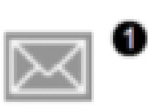
The weight (or relative importance) for each KPI is included in the label underneath the bar and positioning the cursor over the bar will also display KPI details.

Sub-KPI Drill-Down

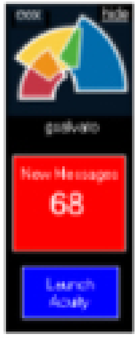
Double-clicking a specific KPI will either render a tabular view of the underlying data or display the sub-KPIs (aka KPI split) that comprise the primary KPI (see screen shot below), enabling the specific area of weakness to be pinpointed with deep granularity.

Communications and Support

If your supervisor has not reached out to you to assist with a weak Key Performance Indicator, reach out to them by using the **Chat** feature accessible at the top of Acuity.



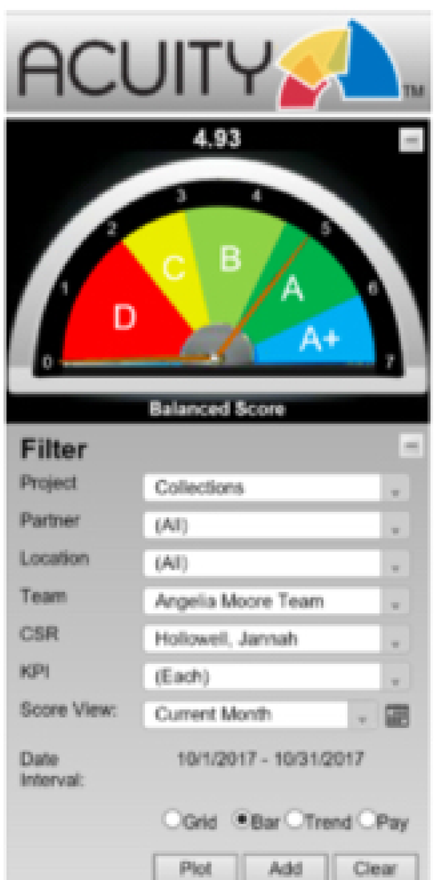
Communication may also be facilitated via Acuity's conventional **Messaging** feature accessible via the envelope icon. A round marker next to the envelope icon will indicate when a new message has been received.



The Acuity Notifier is a small "floating" (meaning it can be moved or positioned anywhere on the desktop) tool bar that keeps you connected when your Acuity dashboard isn't open on your desktop. Notification of New Messages and other information will be displayed here and clicking the available buttons will launch the relevant module within Acuity.

The Acuity Notifier is a "tray application" and requires that you provide login credentials (same as you use for Acuity) to enable.

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.

To isolate a specific KPI, use the **KPI** filter. To view historical performance, select a previous date range from the **Score View** filter.

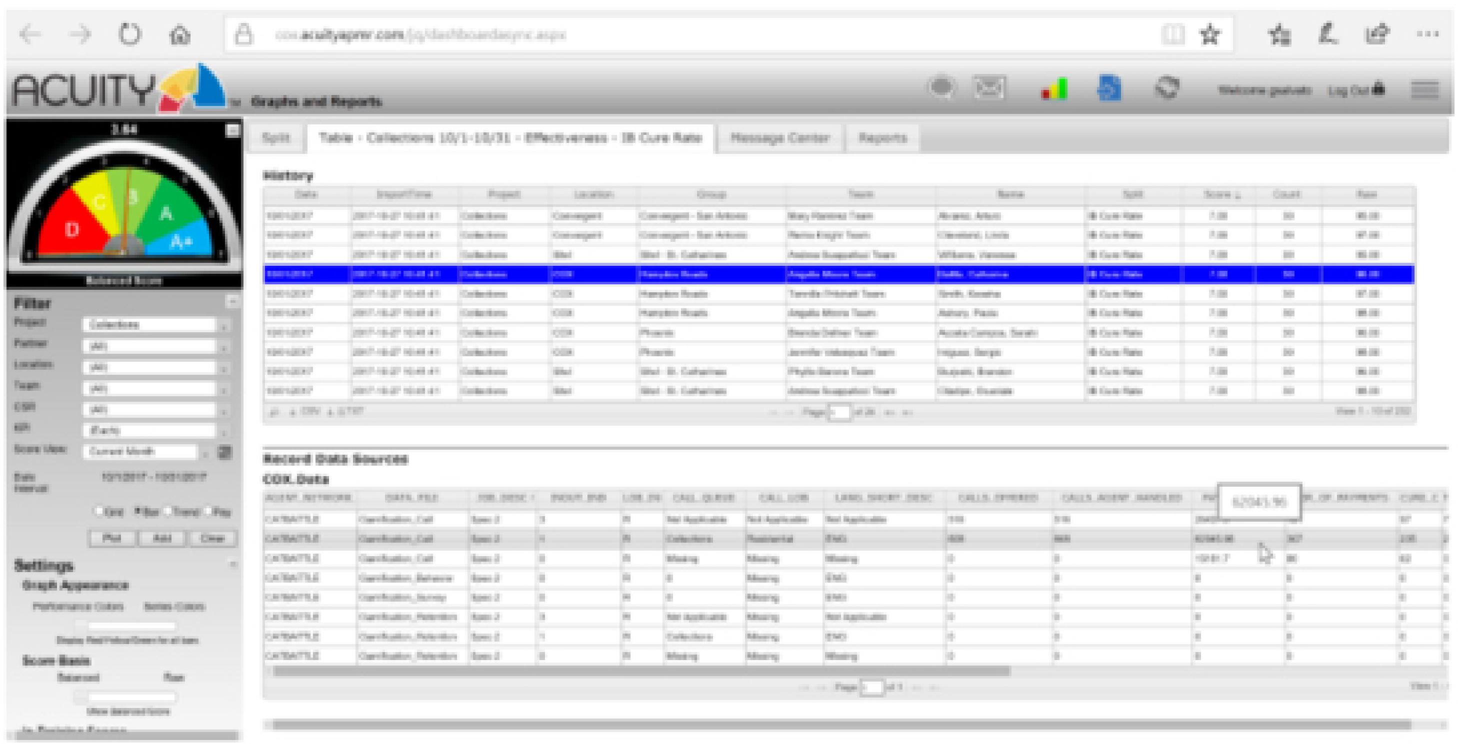
> **TIP:** after selecting filters, click the **Plot** button to run the new or modify the existing report.

Performance Trend Report

To view historical trends of overall or KPI-specific score, click **Trend** and set the desired beginning and end dates using the slider.

Tabular or "Spreadsheet" Views

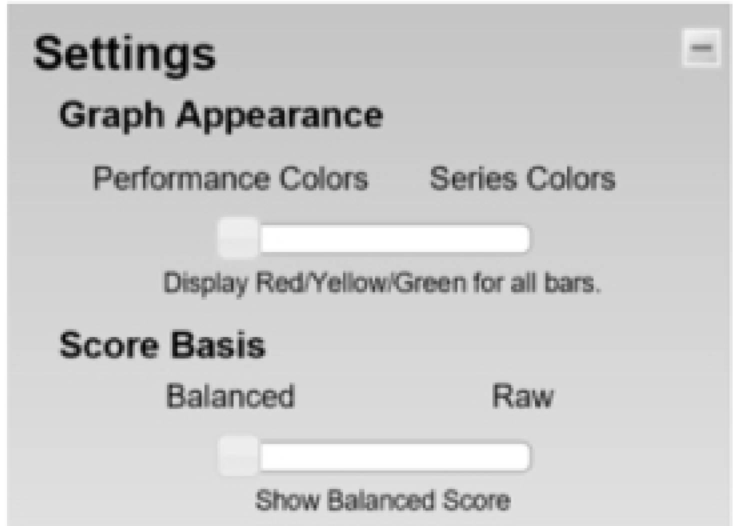
Prefer a tabular view of the data? Select the **Grid** button and click **Search**. Or click on a specific KPI bar in the Bar view to invoke a spreadsheet style report.



Report Settings

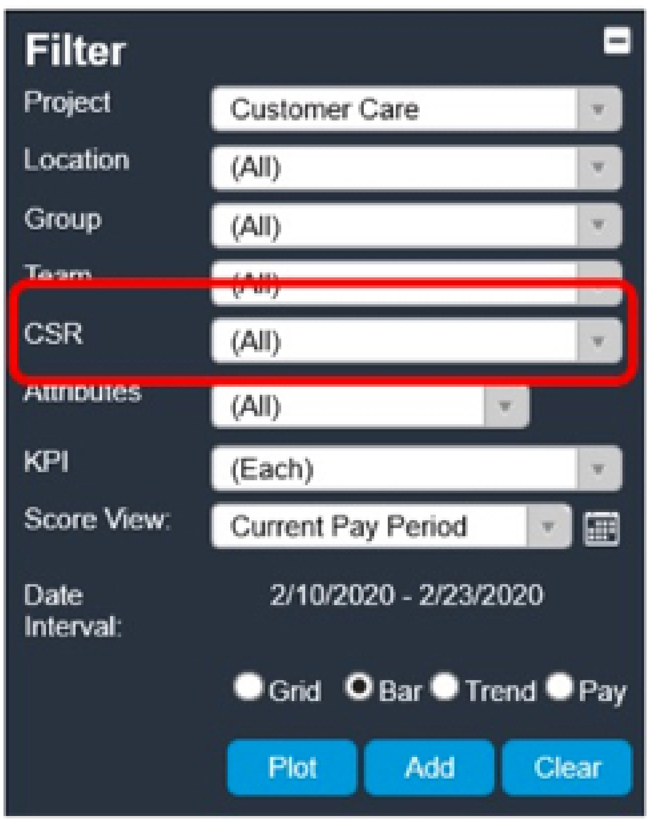
Acuity Settings allow you to change the report display appearance. **Performance Colors** reflect KPI performance as calibrated to defined target levels (A/B/C...). The **Series Colors** options apply a distinct color to each KPI bar.

The **Score Basis** setting allows you to view overall score or pecific KPI values as either "calibrated" performance scores or Raw data values.

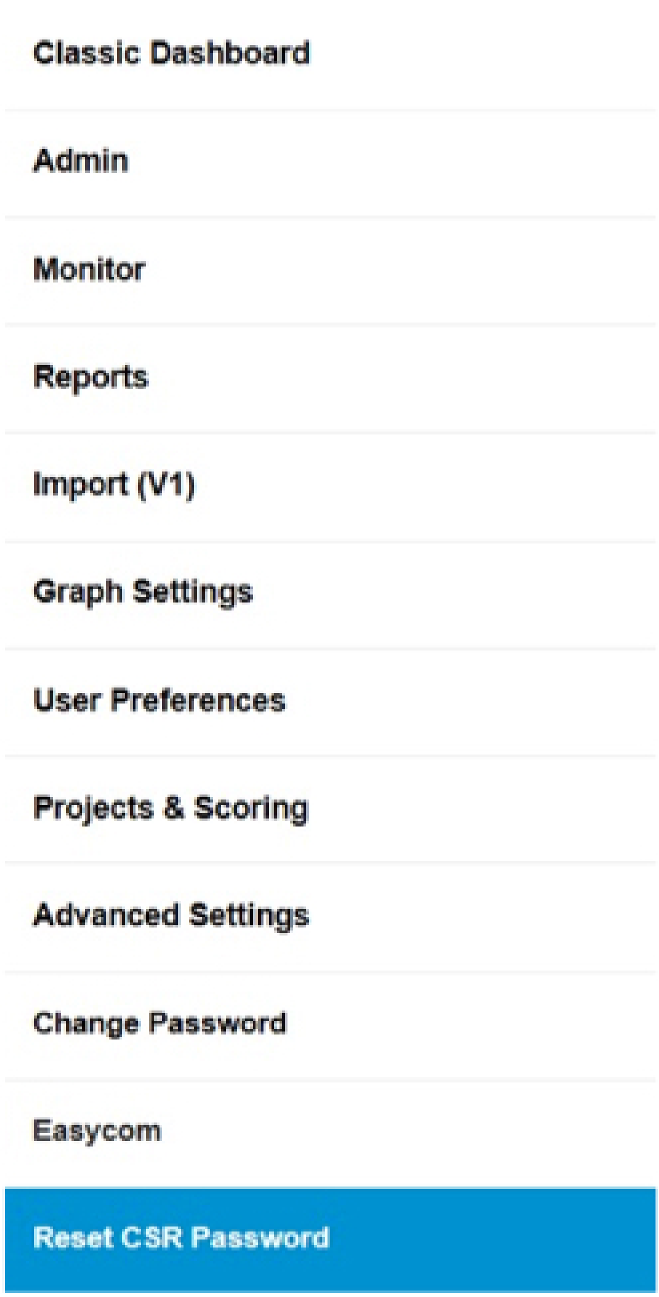


Password Reset

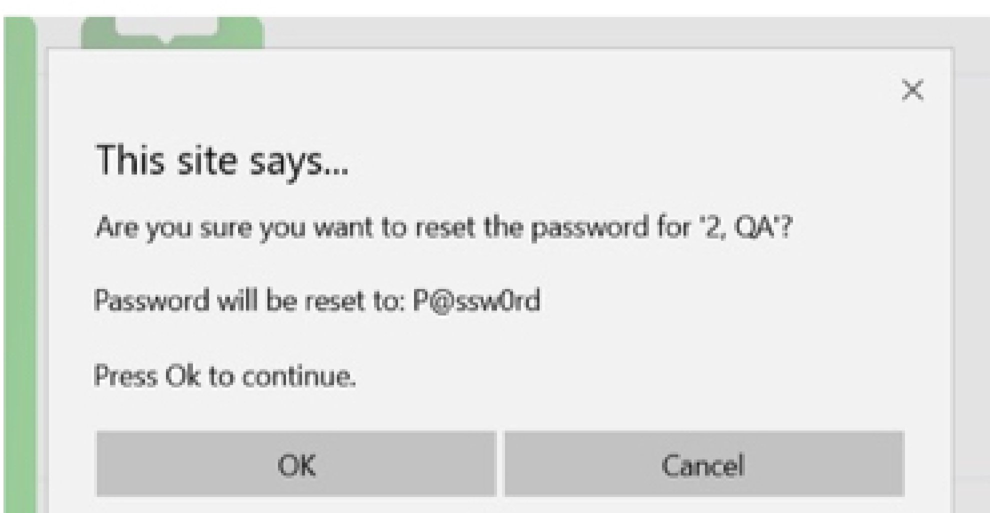
1. To reset an employee's password, first select that employee from the "CSR" filter on the left



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



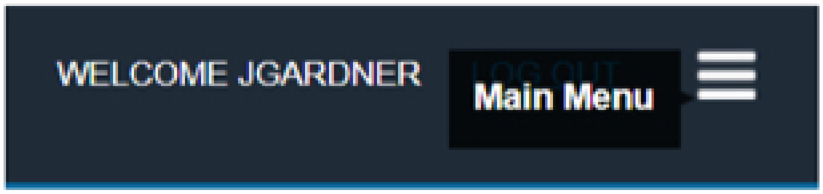
3. Once clicking "Reset CSR Password", a prompt will appear asking you to confirm the password change, along with what the new password will be



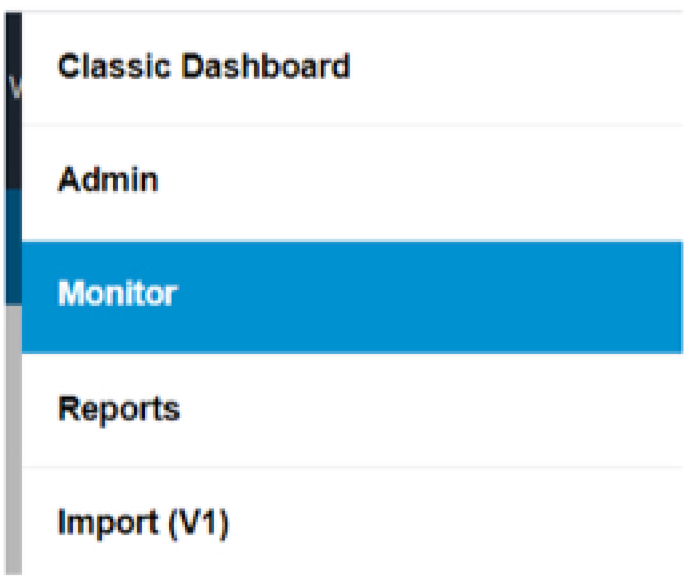
4. To confirm the password change, simply click "OK"

Accessing the Quality Monitor Form

1. Open the menu on the main dashboard

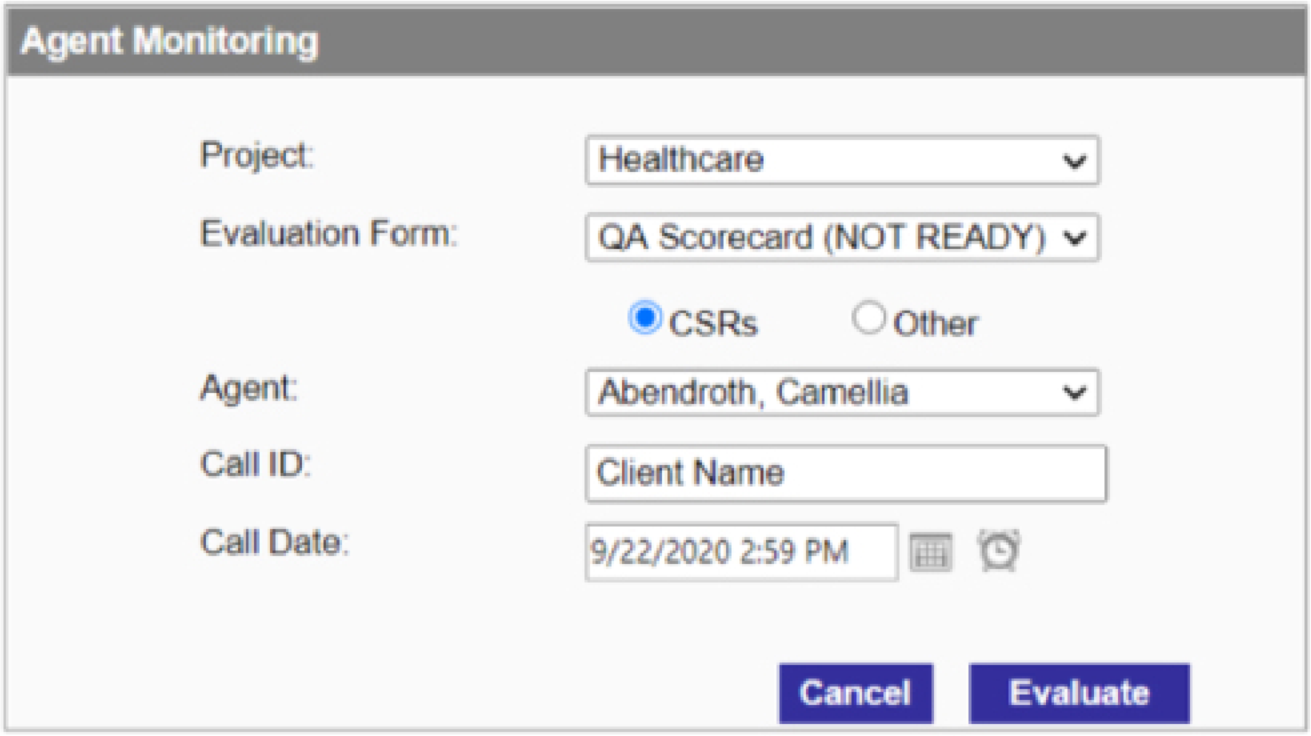


2. Select Monitor from the Main Menu



3. The Project drop down menu allows you to select the project or client that will be evaluated
4. The Evaluation From drop down menu allows you to select the evaluation form you would like to use
5. The Agent (Auditor) drop down menu provides a list of employees to select from
6. The Call ID (Client Name) menu will provide a list of available clients to select from
7. Call Date (QA Date) will be used to identify the date of the QA

8. Clicking Evaluate will open a new monitor form


Agent Monitoring

Project: Healthcare

Evaluation Form: QA Scorecard (NOT READY)

CSRs Other

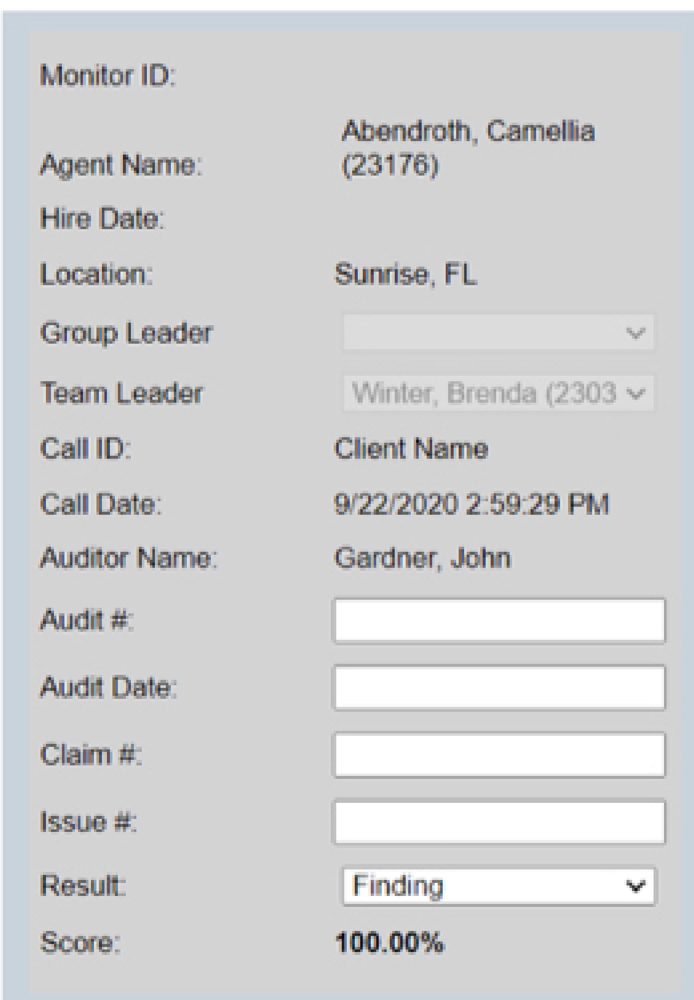
Agent: Abendroth, Camellia

Call ID: Client Name

Call Date: 9/22/2020 2:59 PM

Cancel Evaluate

9. The right side of the Evaluation Form contains relevant information about the Auditor as well as the Audit, Claim, and Issue numbers. The Result and overall score are also displayed here.


Monitor ID:	
Agent Name:	Abendroth, Camellia (23176)
Hire Date:	
Location:	Sunrise, FL
Group Leader	
Team Leader	Winter, Brenda (2303
Call ID:	Client Name
Call Date:	9/22/2020 2:59:29 PM
Auditor Name:	Gardner, John
Audit #:	
Audit Date:	
Claim #:	
Issue #:	
Result:	Finding
Score:	**100.00%**

10. Each field in the Evaluation Form has a drop-down menu assigned to it that includes the available answers to each question.
    a. Note: some fields only allow for Yes/No as others are point based.

11. The Claim Data and E-Codes fields are found at the bottom of the Evaluation Form.
    a. The Claim Data fields have two columns that have fields that can be filled out: Audited and QA
    b. The E-Codes fields are dynamic, meaning that clicking Add and Remove will add or remove as many fields as needed for the Evaluation
12. The Notes section at the bottom of the form is an open field that can utilized to share or document any notes pertaining to the specific evaluation.

13. Once you are ready to submit the monitor, clicking Save Monitor will save and submit the monitor.
    a. Once Saved, the Quality KPI will be immediately updated with the new Evaluation.
    b. The Evaluation will also be immediately ready to view for the Auditor.

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...

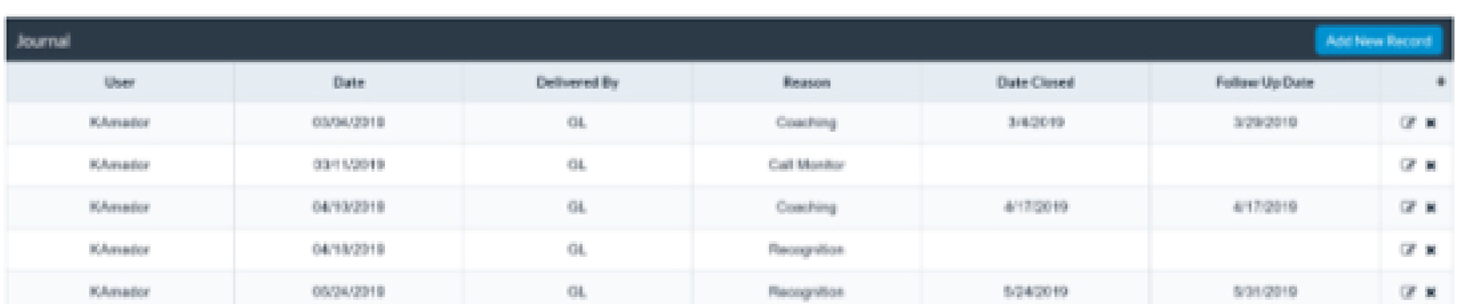
Accessing Sidekick

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.

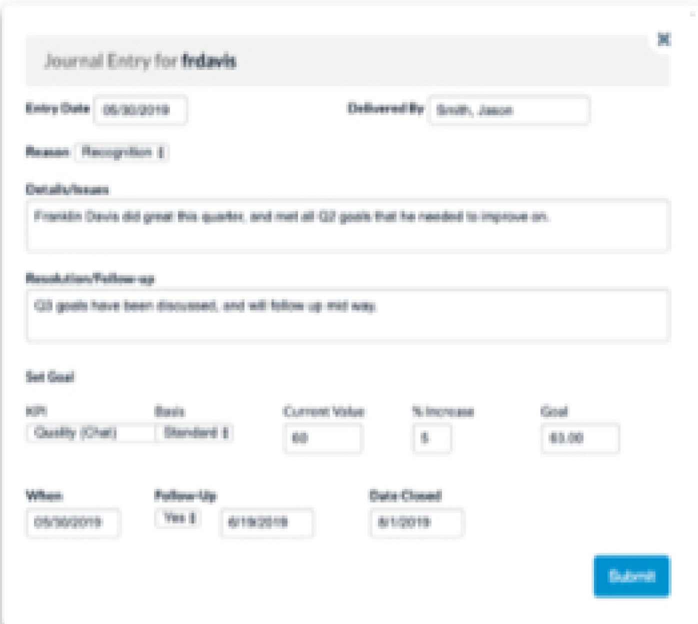


Journal — Add New Record

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	04/13/2019	GL	Coaching	4/17/2019	4/17/2019	
KAmador	04/19/2019	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

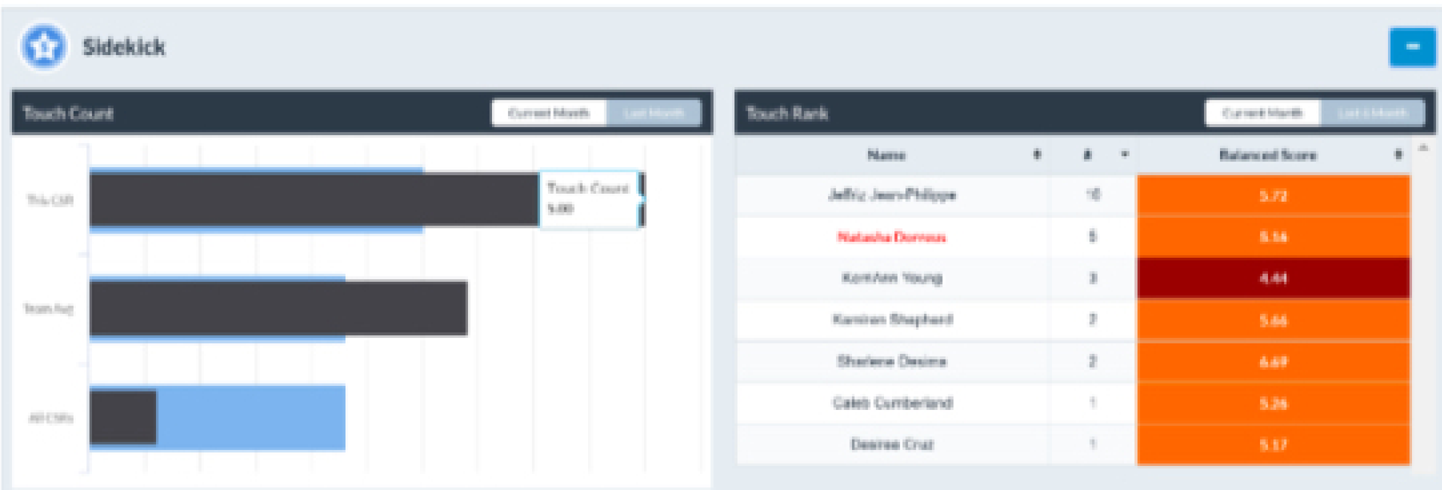
The Performance Trend displays the day-by-day performance scores by Balanced Score or specific KPI for either the Current or Last Month. The Performance Trend view also includes all of the journal entries recorded that same month. In this way, it's easy to visualize the impact of your agent support activities.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

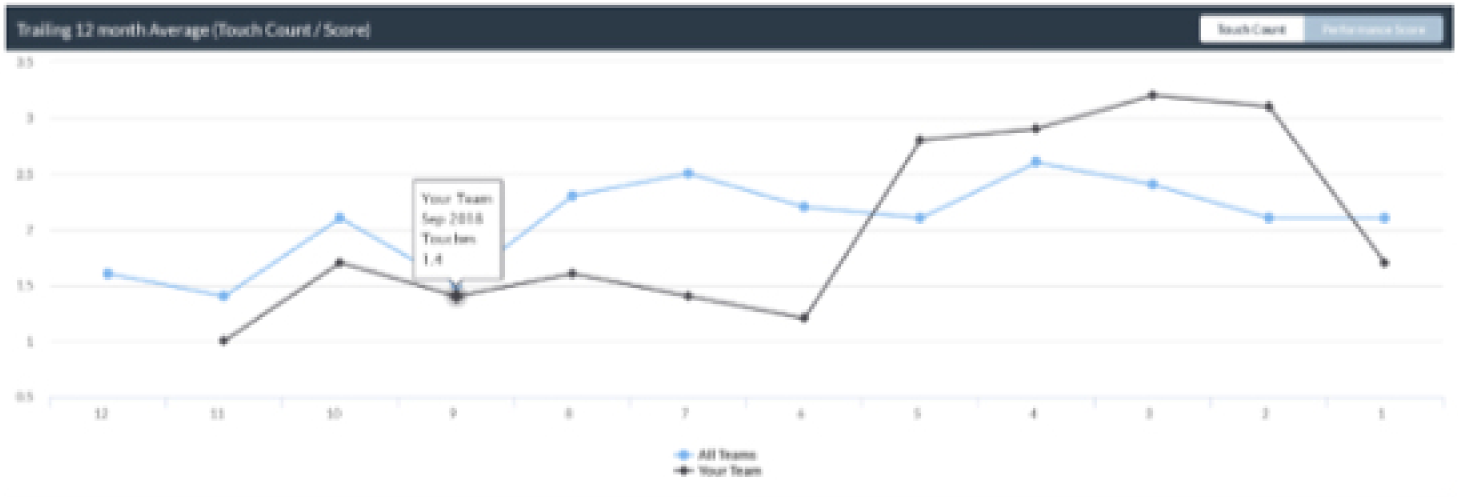


Touch Rank

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.

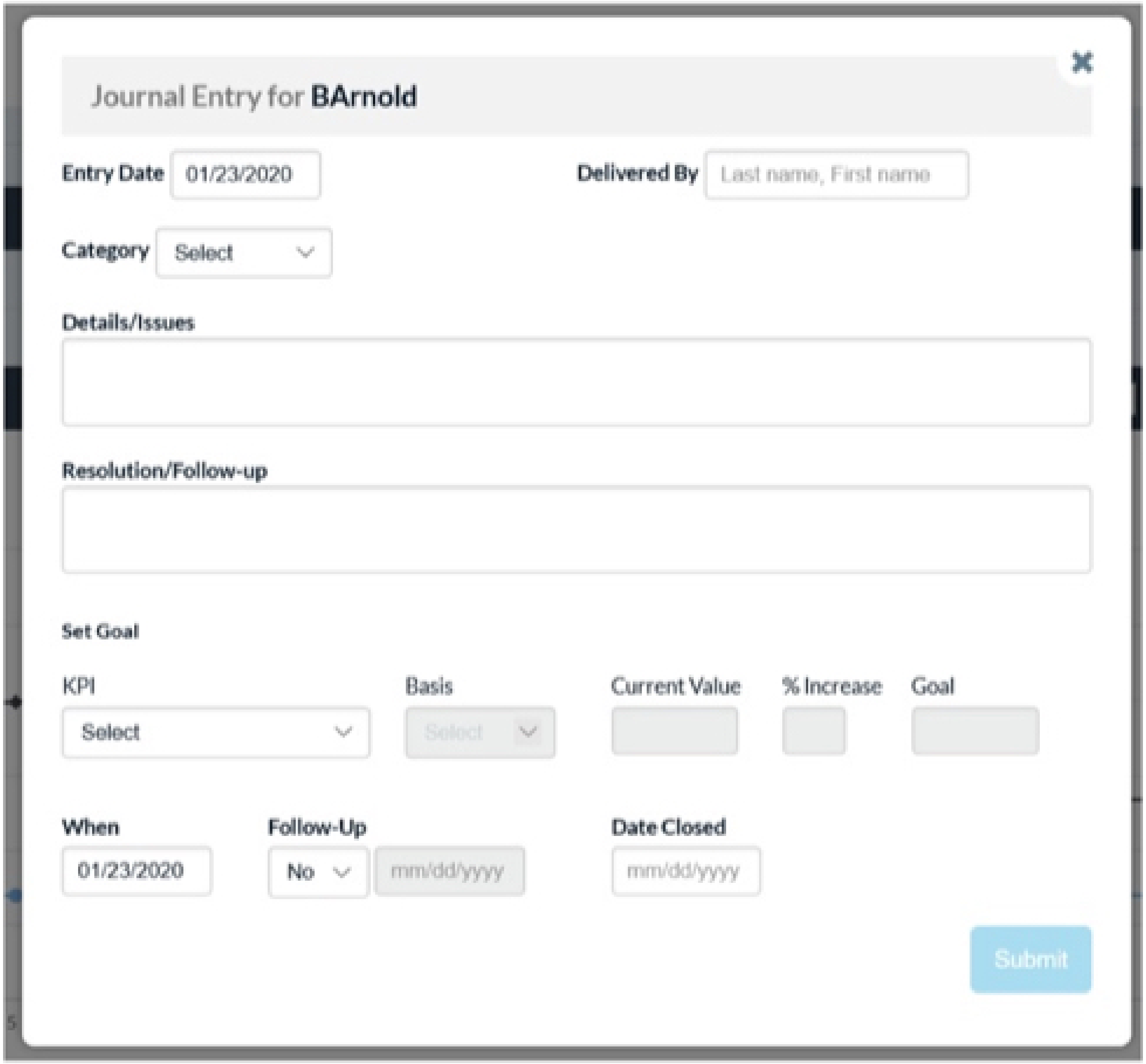


Sidekick Touch Quality

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

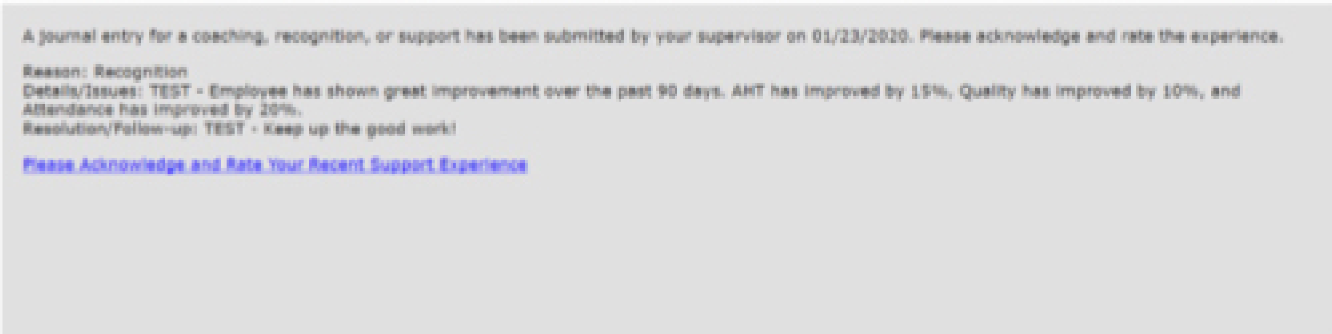
ii. Reason for the entry (example: Coaching or Recognition)

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



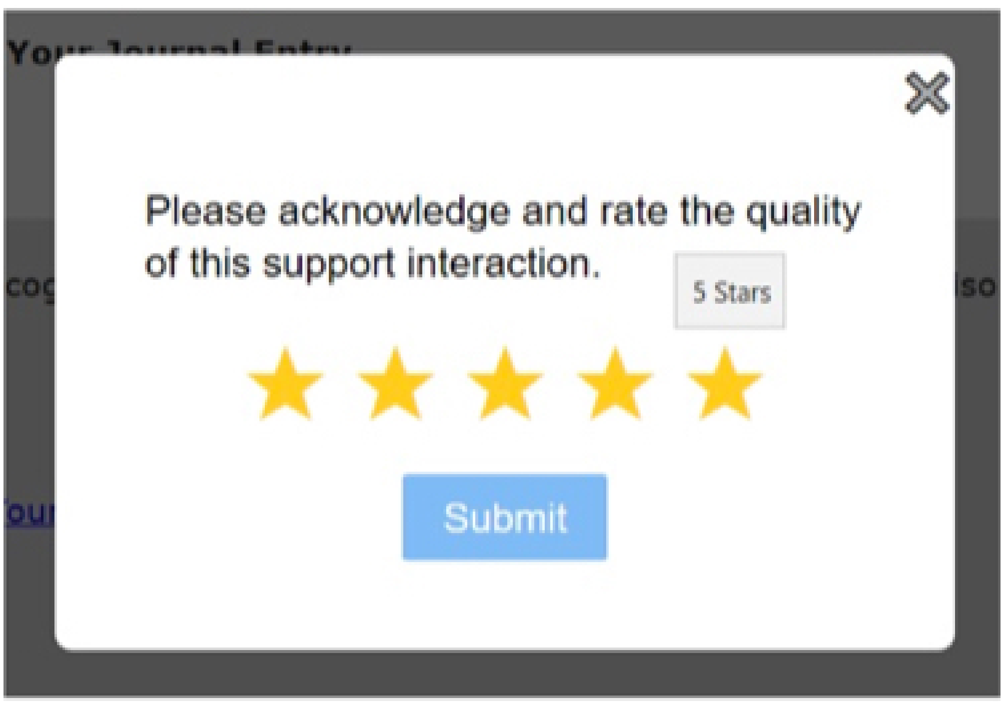
A journal entry for a coaching, recognition, or support has been submitted by your supervisor on 01/23/2020. Please acknowledge and rate the experience.

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!

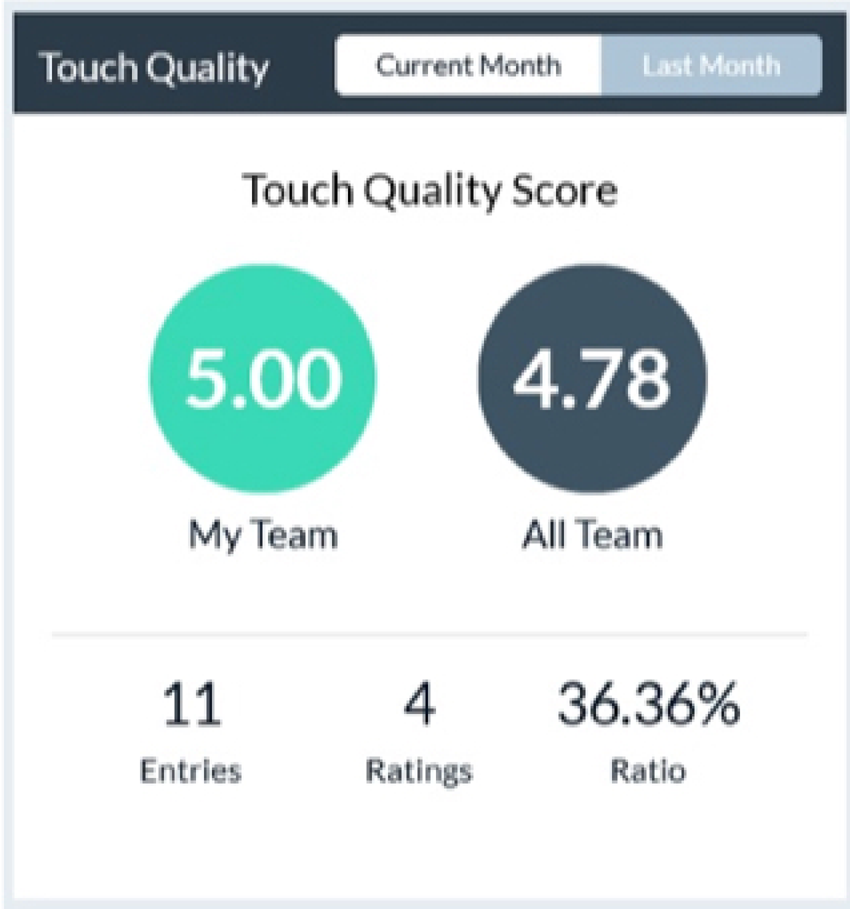
Please Acknowledge and Rate Your Recent Support Experience

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

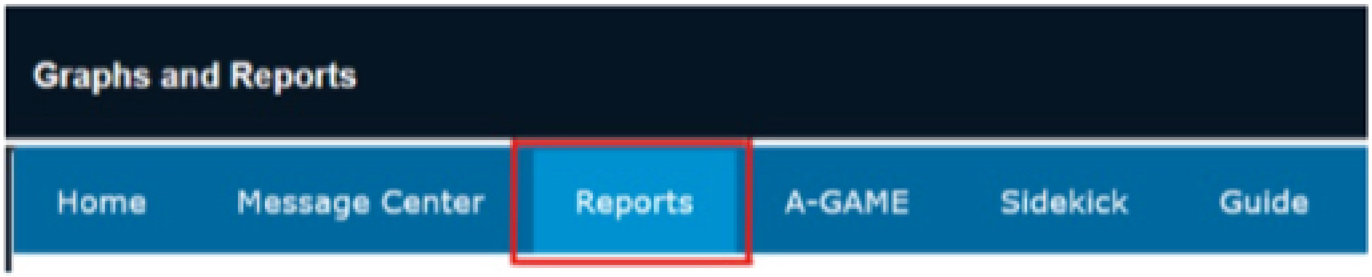
   b. The "All Team" score is the average score of all ratings received for all teams assigned to the selected Project

      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)

Reporting

1. Management can easily track and view the Touch Quality data, along with additional Sidekick data, through the Reports menu on the Main Dashboard



2. The Sidekick Summary report provides a summary of Sidekick data for the selected team(s)

    a. The filters on the left can be used to filter the data that populates in the report

        i. Selecting "Each" in the Team filter will populate data for each team associated with the selected Project

        ii. Selecting "Each" in the CSR filter will populate data for each CSR associated with the selected Team or Project

    b. Data shown includes:

        i. Team Name or CSR Name

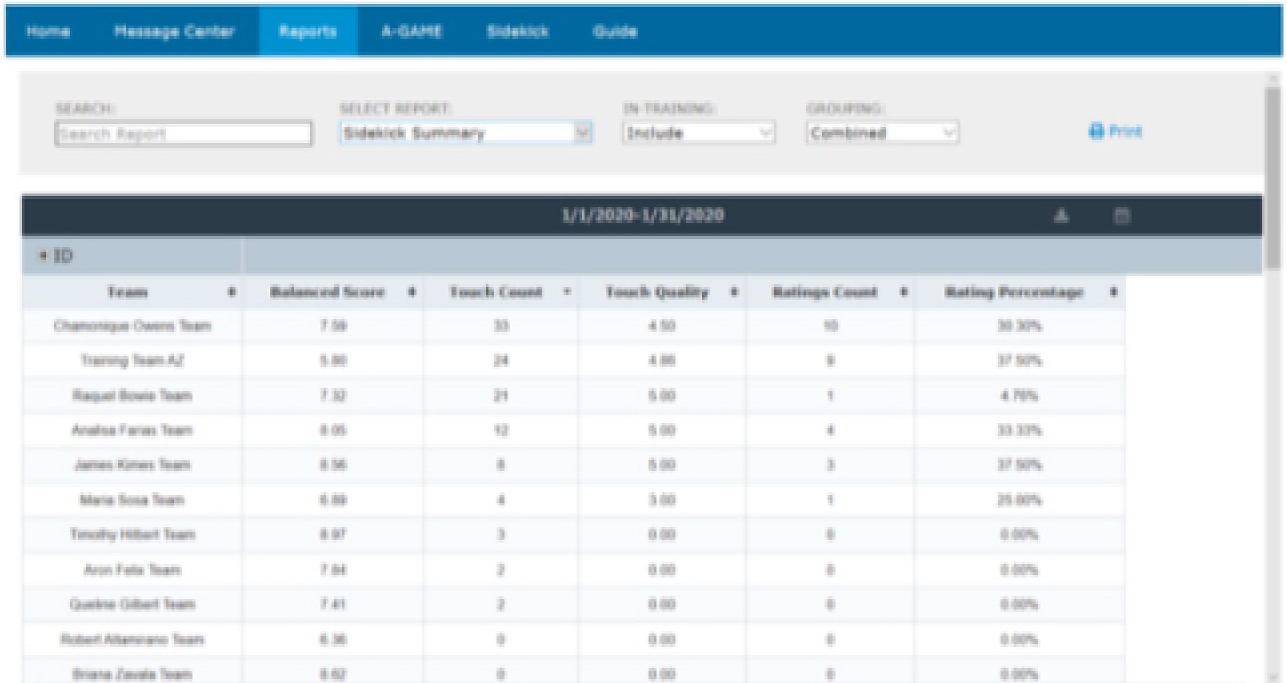
        ii. Balanced Score (Overall Balanced Score for the team or CSR)

        iii. Touch Count (Total number of journal entries submitted for the team or CSR)

        iv. Touch Quality (Touch Quality rating from the team or CSR)

        v. Ratings Count (Total number of ratings received from the team or CSR)

        vi. Rating Percentage (Ratings Count / Touch Count)



Team	Balanced Score	Touch Count	Touch Quality	Ratings Count	Rating Percentage
Chamonique Owens Team	7.59	33	4.50	10	30.30%
Training Team AZ	5.80	24	4.00	9	37.50%
Raquel Bowie Team	7.32	21	5.00	1	4.76%
Analisa Farias Team	8.05	12	5.00	4	33.33%
James Kimes Team	8.56	8	5.00	3	37.50%
Maria Sosa Team	6.89	4	3.00	1	25.00%
Timothy Hilbert Team	8.97	3	0.00	0	0.00%
Aron Felix Team	7.84	2	0.00	0	0.00%
Queline Gilbert Team	7.41	2	0.00	0	0.00%
Robert Altamirano Team	6.36	0	0.00	0	0.00%
Briana Zavala Team	8.62	0	0.00	0	0.00%

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