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[MAXIMUS logo](https://www.maximus.com/)

Detail Design: CCO eCoaching Log - New Submission

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Prepared by: Lili Huang Date: 04/23/2018

Department: FCD

Change History Log

| Date | Change Description | Author |
| --- | --- | --- |
| 04/23/2018 | Initial Revision – TFS 10200 | Lili Huang |
| 07/05/2018 | Minor update per review | Lili Huang |
| 08/31/2018 | TFS11984 – Include a link to ecl sharepoint site to report issues;  Updated 3.4 Web Page Invoked Events | Lili Huang |
| 09/04/2018 | TFS11984 - Include a link to ecl sharepoint site to report issues;  Moved the change to Common DD. | Lili Huang |
| 03/07/2019 | TFS13717 – Add Dual as a Program and Change Module label; | Lili Huang |
| 03/13/2019 | TFS13809 – New Submission: Changing Program resets Direct/Indirect radion btn; | Lili Huang |
| 09/04/2019 | TFS 14679 – Follow-up Process | Lili Huang |
| 07/24/2020 | TFS 17803 – GDIT to MAXIMUS | Lili Huang |
| 08/27/2020 | TFS 18322 – Work At Home (Return to Site Only) | Lili Huang |
| 10/05/2021 | TFS 23137 – Quality – new coaching reason pfd and pfd date;  Updated screenshot | Lili Huang |
| 06/07/2022 | TFS 24733 – Team Submission | Lili Huang |
| 04/11/2023 | TFS 26420 – New Coaching Reason: Claims View (Medicare Only).  Updated 2. Business Logic – NewSubmissionController.cs  Updated screenshot | Lili Huang |
| 12/04/2023 | 27483 - WAH coaching reason text change, subcoaching reason update; Add WFH (Return to Site) for Quality module.  Updated “Work At Home” to “Work From Home”. | Lili Huang |
| 02/14/2024 | TFS 27695 – Subcontractor;  Updated:   1. Description | Lili Huang |
|  |  |  |

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1. **Description**

This module allows authorized users to submit coaching logs for the following groups:

* **CSR** *(CCO and Subcontractors)*
* **SUPERVISOR** *(CCO and Subcontractors)*
* **QUALITY** *(CCO)*
* **LSA** *(CCO)*
* **TRAINING** *(CCO and Subcontractors)*

Authorized users can submit warning logs for those who directly report to them.

Authorized CCO users with a role of ARC, or QAM, or PMA can submit coaching logs for subcontractors.

Authorized subcontractor users can submit logs only for their own site.

Users with these job codes are allowed to submit **CSR** coaching logs:

|  |  |
| --- | --- |
| **Job Code** | **Description** |
| WABA11 | Assoc Administrator, Business |
| WACQ02 | Monitor, Quality (CS) |
| WACQ03 | Sr Monitor, Quality (CS) |
| WACQ12 | Specialist, Quality (CS) |
| WACQ13 | Sr Specialist, Quality (CS) |
| WACQ40 | Supervisor, Quality (CS) |
| WACS02 | Specialist, Customer Service |
| WACS40 | Supervisor, Customer Service |
| WACS50 | Manager, Customer Service |
| WACS60 | Sr Manager, Customer Service |
| WBCO50 | Manager, Communications |
| WBCO70 | Director, Communications |
| WEEX90 | Section Vice President |
| WEEX91 | Program Vice President |
| WEEXDV | Division Vice President |
| WFFA40 | Supervisor, Finance |
| WFFA50 | Manager, Finance |
| WIHD01 | Assoc Technician, Help Desk |
| WIHD02 | Technician, Help Desk |
| WIHD03 | Sr Technician, Help Desk |
| WIHD04 | Lead Technician, Help Desk |
| WIHD40 | Supervisor, Help Desk |
| WIHD50 | Manager, Help Desk |
| WISA12 | Administrator, Systems |
| WISO12 | Engineer, Software |
| WISO13 | Sr Engineer, Software |
| WISY14 | Principal Analyst, Systems |
| WMPR40 | Supervisor, Production |
| WMPR50 | Manager, Production |
| WPOP11 | Associate Analyst, Operations |
| WPOP12 | Analyst |
| WPOP50 | Manager, Operations |
| WPOP60 | Sr Manager, Operations |
| WPOP70 | Director, Operations |
| WPPM11 | Associate Analyst, Program |
| WPPM12 | Analyst, Program |
| WPPM13 | Sr Analyst, Program |
| WPPM50 | Manager, Program |
| WPPM60 | Sr Manager, Program |
| WPPM70 | Director, Program |
| WPPM80 | Sr Director, Program |
| WPPT40 | Supervisor, Project/Task |
| WPPT50 | Manager, Project/Task |
| WPPT60 | Sr Manager, Project/Task |
| WPSM11 | Associate Analyst, Functional |
| WPSM12 | Analyst, Functional |
| WPSM13 | Sr Analyst, Functional |
| WPSM14 | Principal Analyst, Functional |
| WPSM15 | Sr Princ Analyst, Functional |
| WPWL51 | Manager, Regional |
| WSQA50 | Manager, Quality Assurance |
| WSQA70 | Director, Quality Assurance |
| WSTE13 | Sr Engineer, Test |
| WTID13 | Sr Developer, Instructional |
| WTTI02 | Instructor |
| WTTR12 | Specialist, Training |
| WTTR13 | Sr Specialist, Training |
| WTTR40 | Supervisor, Training |
| WTTR50 | Manager, Training |

Users with these job codes are allowed to submit **SUPERVISOR** coaching logs:

|  |  |
| --- | --- |
| **Job Code** | **Description** |
| WACQ13 | Sr Specialist, Quality (CS) |
| WACS40 | Supervisor, Customer Service |
| WACS50 | Manager, Customer Service |
| WACS60 | Sr Manager, Customer Service |
| WBCO50 | Manager, Communications |
| WBCO70 | Director, Communications |
| WEEX90 | Section Vice President |
| WEEX91 | Program Vice President |
| WEEXDV | Division Vice President |
| WFFA40 | Supervisor, Finance |
| WFFA50 | Manager, Finance |
| WISO12 | Engineer, Software |
| WISO13 | Sr Engineer, Software |
| WISY14 | Principal Analyst, Systems |
| WMPR40 | Supervisor, Production |
| WMPR50 | Manager, Production |
| WPOP11 | Associate Analyst, Operations |
| WPOP12 | Analyst |
| WPOP50 | Manager, Operations |
| WPOP60 | Sr Manager, Operations |
| WPOP70 | Director, Operations |
| WPPM11 | Associate Analyst, Program |
| WPPM12 | Analyst, Program |
| WPPM50 | Manager, Program |
| WPPM60 | Sr Manager, Program |
| WPPM70 | Director, Program |
| WPPM80 | Sr Director, Program |
| WPPT40 | Supervisor, Project/Task |
| WPPT50 | Manager, Project/Task |
| WPPT60 | Sr Manager, Project/Task |
| WPSM11 | Associate Analyst, Functional |
| WPSM12 | Analyst, Functional |
| WPSM13 | Sr Analyst, Functional |
| WPSM14 | Principal Analyst, Functional |
| WPSM15 | Sr Princ Analyst, Functional |
| WPWL51 | Manager, Regional |
| WSTE13 | Sr Engineer, Test |
| WTTI02 | Instructor |
| WTTR12 | Specialist, Training |
| WTTR40 | Supervisor, Training |
| WTTR50 | Manager, Training |

Users with these job codes are allowed to submit **QUALITY** coaching logs:

|  |  |
| --- | --- |
| **Job Code** | **Description** |
| WACQ02 | Monitor, Quality (CS) |
| WACQ03 | Sr Monitor, Quality (CS) |
| WACQ12 | Specialist, Quality (CS) |
| WACQ13 | Sr Specialist, Quality (CS) |
| WACQ40 | Supervisor, Quality (CS) |
| WEEX90 | Section Vice President |
| WEEX91 | Program Vice President |
| WEEXDV | Division Vice President |
| WISO12 | Engineer, Software |
| WISO13 | Sr Engineer, Software |
| WISY14 | Principal Analyst, Systems |
| WPOP70 | Director, Operations |
| WPPM12 | Analyst, Program |
| WPPM13 | Sr Analyst, Program |
| WPPM60 | Sr Manager, Program |
| WSQA50 | Manager, Quality Assurance |
| WSQA70 | Director, Quality Assurance |
| WSTE13 | Sr Engineer, Test |

Users with these job codes are allowed to submit **LSA** coaching logs:

|  |  |
| --- | --- |
| **Job Code** | **Description** |
| WABA11 | Assoc Administrator, Business |
| WEEXDV | Division Vice President |
| WIHD01 | Assoc Technician, Help Desk |
| WIHD02 | Technician, Help Desk |
| WIHD03 | Sr Technician, Help Desk |
| WIHD04 | Lead Technician, Help Desk |
| WIHD40 | Supervisor, Help Desk |
| WIHD50 | Manager, Help Desk |
| WISA12 | Administrator, Systems |
| WISO12 | Engineer, Software |
| WISO13 | Sr Engineer, Software |
| WISY14 | Principal Analyst, Systems |
| WMPR40 | Supervisor, Production |
| WMPR50 | Manager, Production |
| WPOP70 | Director, Operations |
| WPPM60 | Sr Manager, Program |
| WPPT40 | Supervisor, Project/Task |
| WPPT50 | Manager, Project/Task |
| WPPT60 | Sr Manager, Project/Task |
| WSTE13 | Sr Engineer, Test |

Users with these job codes are allowed to submit **TRAINING** coaching logs:

|  |  |
| --- | --- |
| **Job Code** | **Description** |
| WEEXDV | Division Vice President |
| WISO12 | Engineer, Software |
| WISO13 | Sr Engineer, Software |
| WISY14 | Principal Analyst, Systems |
| WPOP70 | Director, Operations |
| WSTE13 | Sr Engineer, Test |
| WTID13 | Sr Developer, Instructional |
| WTTR12 | Specialist, Training |
| WTTR13 | Sr Specialist, Training |
| WTTR40 | Supervisor, Training |
| WTTR50 | Manager, Training |

Users enter the New Submission page by clicking “New Submission” on the top menu bar. Based on which group is selected, different information will be collected to complete the submission.

Users with job codes WACS40 or WACS50 or WACS60 can submit coaching logs for up to 100 employees in one submission. This is restricted to **CSR** group only.

1. **Business Logic – NewSubmissionController.cs**

Upon user enters the page, display Module dropdown only, which is loaded based on user’s employee ID;

* If CSR is selected,
* Display Site dropdown. The Site dropdown has all active sites;
* Display Employee dropdown and Program dropdown once a site is selected; The Employee dropdown has all active employees for the selected site;
* If LSA is selected,
* Display Employee dropdown and Program dropdown; The Employee dropdown has all employees on LSA team;

* If Quality is selected,
* Display Employee dropdown and Program dropdown; The Employee dropdown has all employees on quality team;
* If Supervisor is selected,
* Display Employee dropdown and Program dropdown; The Employee dropdown has all supervisors;
* If Training is selected,
* Display Employee dropdown and Behavior dropdown; The Employee dropdown has all employees on training team;

User selects an employee from the Employee dropdown,

* Display supervisor and manager names for the selected employee;

User selects a program from the Program dropdown or a behavior from the Behavior dropdown,

* Display “Will you be delivering the coaching session?” with two radio buttons (Yes; No, I will not be delivering the coaching session.) if not already displayed;

User selects “Yes” radio button (“Will you be delivering the coaching session?”), display the following:

* If the user is the supervisor of the selected employee,
* Display “Do you need to submit a progressive disciplinary coaching (WARNING)?”, default to “No”;
* If “Yes” is selected,
* Display “Please select type of wanring:” with a dropdown;
* Display “Please select warning reason” with a dropdown;
* Display “Enter/Select the date the warning was issued:” with a textbox and a calendar icon;
* Display “I have verified that all the information on this form is true and complete to the best of my knowledge” with a checkbox;
* Go to “User submits the form by clicking Submit button”;
* “Enter/Select the date of coaching:” with a textbox and a calendar icon;
* “Is this a Customer Service Escalation (CSE)?” with two radio buttons as “Yes”, “No”, default to “No”; (For CSR module only);
* “Select the Type of Coaching from the Categories:” ;
* “Coaching Reasons” as hyperlink, which toggles to show/hide the Coaching Reason list;
* [Coaching Reason list] with checkbox for the selected Module;
* Display sub coaching reason list under the checked coaching reason;
* Display “Opportunity” or “Reinforcement” or both (based on the checked Coaching Reason) with radio buttons;
* “Provide details of the behavior to be coached:” with textarea, maximum 3000 characters if reasons other than “Work From Home (Return to Site Only) selected; Otherwise display “Provide details of the behavior to be coached:” with the following:

CCO employees who participate in the CCO Work From Home are obligated to comply with all Maximus policies and procedures. The purpose of this eCL is to notify you that your CCO Remote Work Agreement is being rescinded.

Effective you will be required to report to work at the site. You will be reporting to . Any wages adjustments that were completed based on your remote status and the county you live in will be adjusted to reflect the location you are working and your position.

Any equipment you have received for the Work From Home assignment should be returned to your supervisor on your first day of reporting to the site.

Maximus anticipates that a mutually beneficial employment relationship will continue as you work at the site.

* “Provide the details from the coaching session including action plans developed:” with textarea, maximum 3000 characters;
* If it is CSR module, display “Is follow-up required?” with two radio buttons as “Yes”, “No”;
* If “Yes” is selected,
* Display “Select the date of follow-up:” with a textbox and a calendar icon;“How was the coaching opportunity identified?” with dropdown;
* “Is there a Call Record associated with the coaching?” with two radio buttons as “Yes”, “No”, default to “No”;
* If “Yes” is selected,
* Display Call Type dropdown (allow users to select a call type) with a textbox (allow users to enter the selected call ID);
* “I have verified that all the information on this form is true and complete to the best of my knowledge” with checkbox;

User selects “No, I will not be delivering the coaching session.” radio button (“Will you be delivering the coaching session?”), display the following:

* “Enter/Select the date of event:” with a textbox and a calendar icon;
* “Select the Type of Coaching from the Categories:” ;
* “Coaching Reasons” as hyperlink, which toggles to show/hide the Coaching Reason list;
* [Coaching Reason list] with checkbox for the selected Module;
* Display sub coaching reason list under the checked coaching reason;
* Display “Opportunity” or “Reinforcement” or both (based on the checked Coaching Reason) with radio buttons;
* If non-Medicare program is selected, display error message when user selects “Claims View (Medicare Only)” coaching reason.
* “Enter/Select the date of coaching:” with a textbox and a calendar icon;
* “Provide details of the behavior to be coached:” with textarea, maximum 3000 characters;
* If it is CSR module, display “Is follow-up required?” with two radio buttons as “Yes”, “No”;
* If “Yes” is selected,
* Display “Select the date of follow-up:” with a textbox and a calendar icon;
* “How was the coaching opportunity identified?” with dropdown;
* “Is there a Call Record associated with the coaching?” with two radio buttons as “Yes”, “No”, default to “No”;
* If “Yes” is selected,
* Display Call Type dropdown (allow users to select a call type) with a textbox (allow users to enter the selected call ID);
* “I have verified that all the information on this form is true and complete to the best of my knowledge” with checkbox;

User submits the form by clicking Submit button:

* Validate form data;
* If not valid, display validation errors;
* If valid, save data to database; if success, reset the page and display success message; otherwise, display save fail message.
* Generate email notification(s), and store them in database.

User cancels the submission by clicking Cancel button:

* Reset the page;

1. **Page details - Views\NewSubmission\Index.cshtml**
   1. Razor pages comprising Web Page

\_AddEmployee.cshtml

\_EmployeeDualListBox.cshtml

\_EmployeeSelection.cshtml

\_Message.cshtml

\_NewSubmission.cshtml

\_NewSubmissionBottom.cshtml

\_NewSubmissionCoach.cshtml

\_NewSubmissionCoachingReasons.cshtml

\_NweSubmissionIsCoachingByYou.cshtml

\_NewSubmissionTop.cshtml

\_NewSubmissionTop.csthml

\_NewSubmissionWarning.cshtml

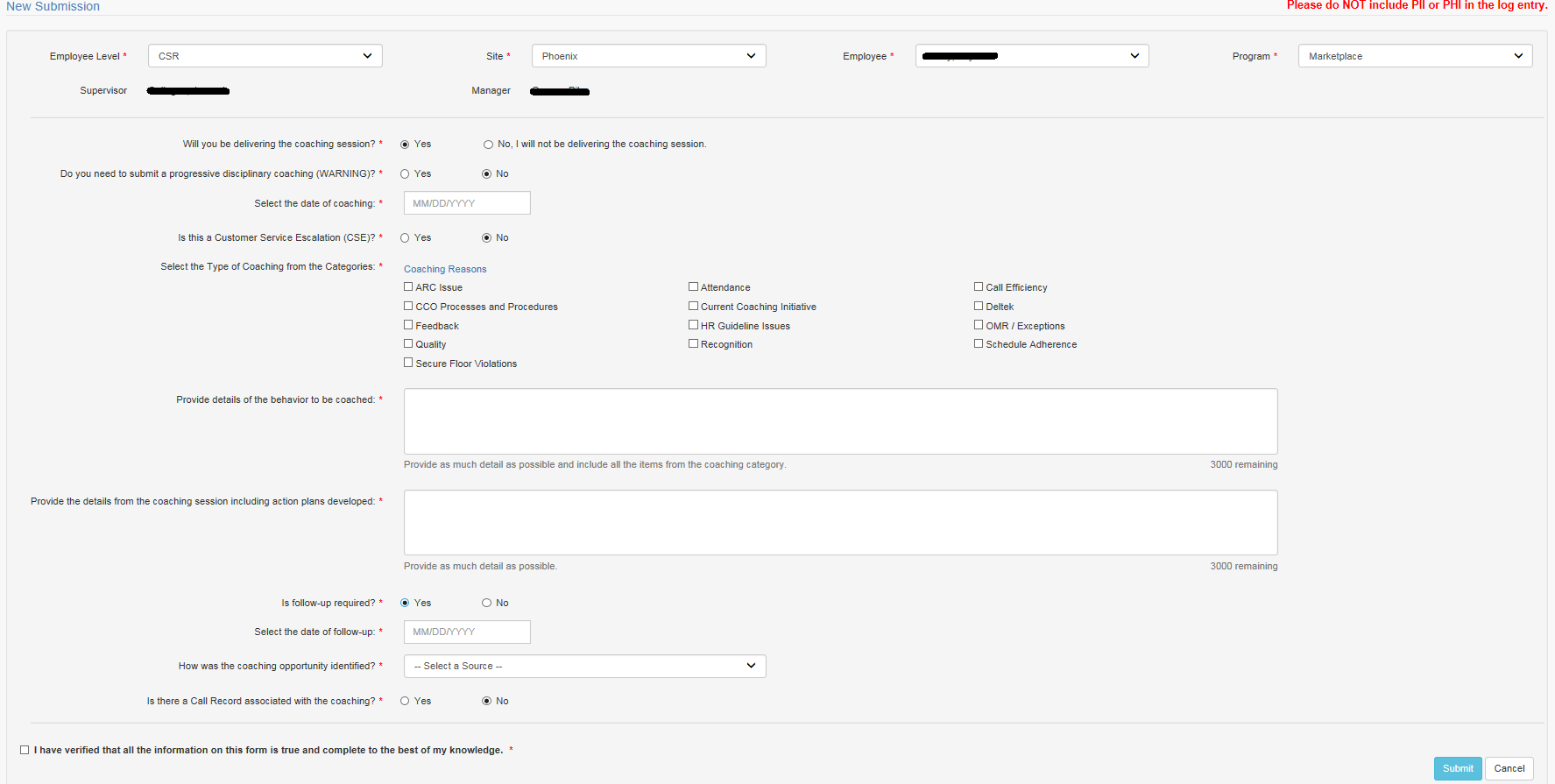
\_NesSubmissionWarningChoice.cshtml

* 1. Layout Page

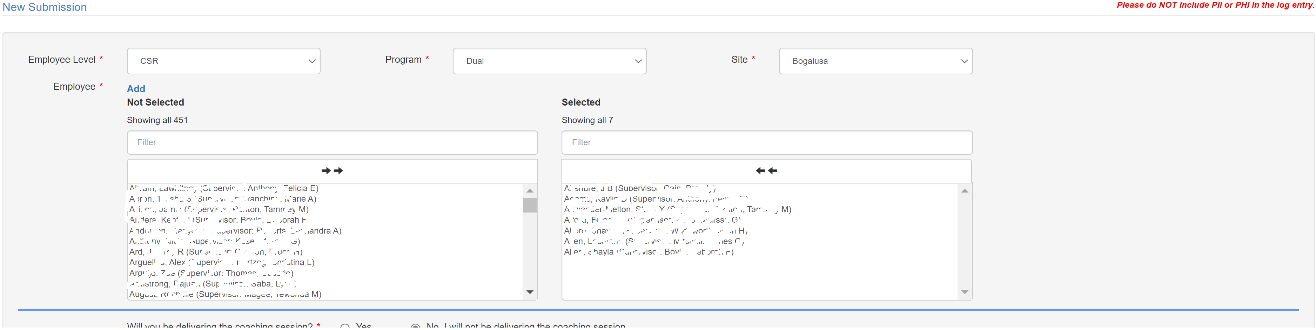
Views\Shared\\_Layoutcshtml

* 1. Screenshot

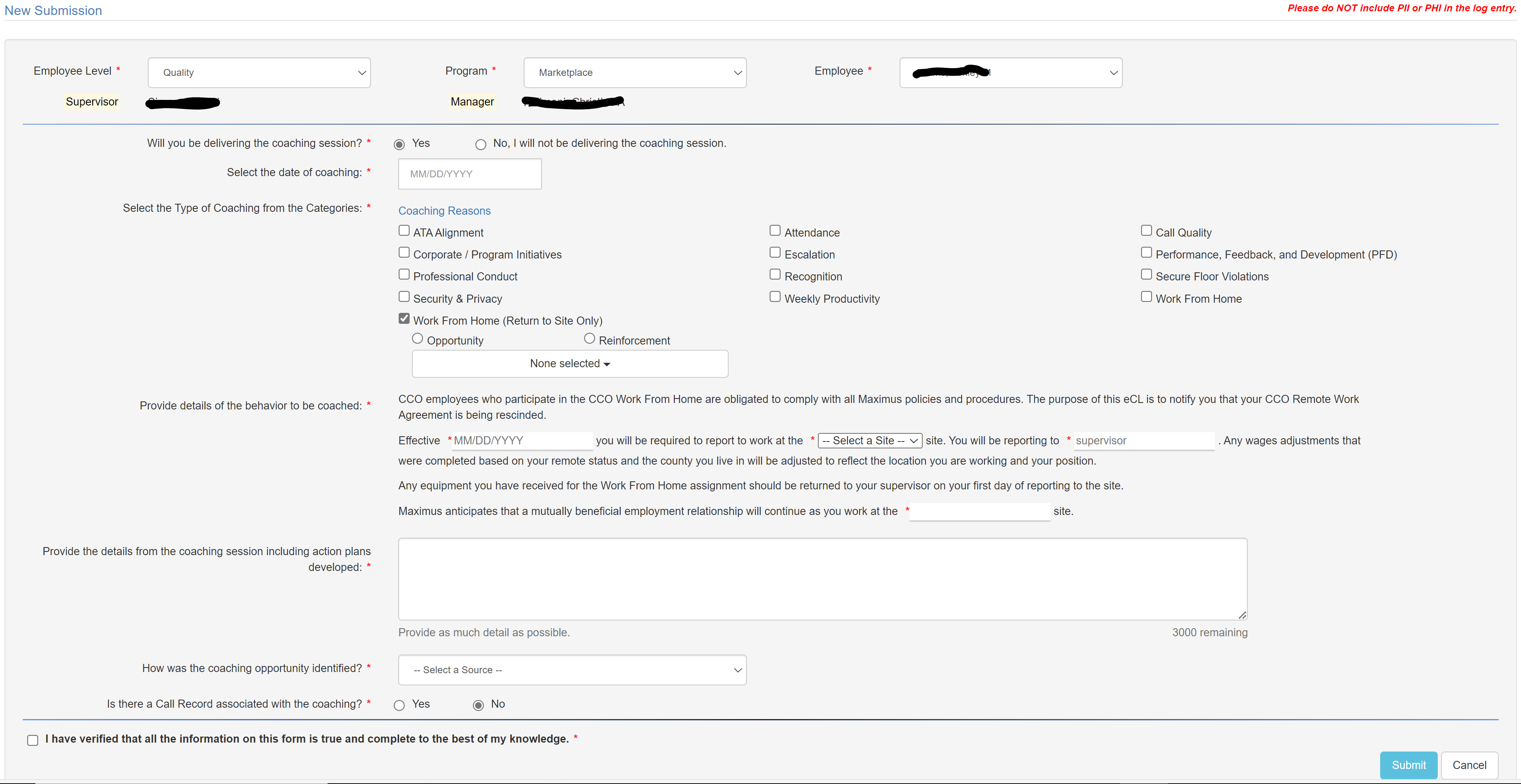
Submit a coaching log:



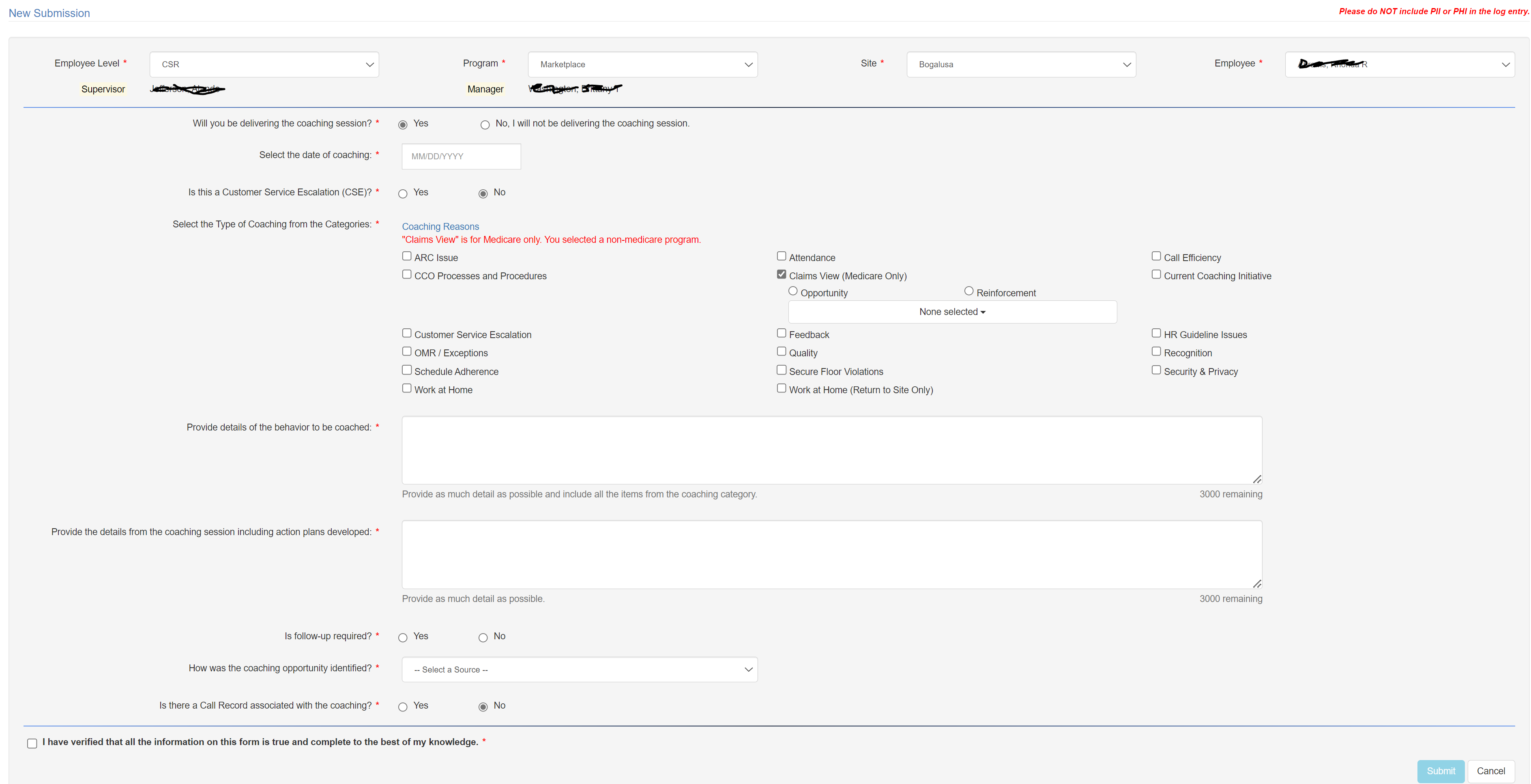
Submit a coaching log for multiple CSRs:



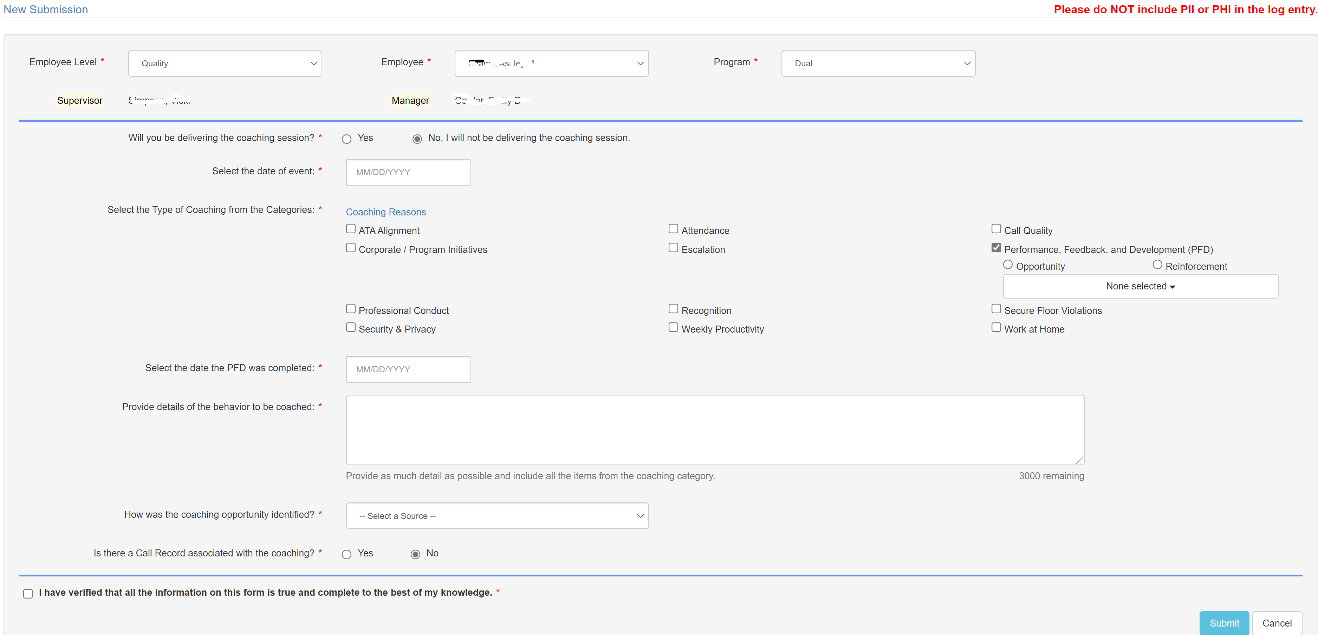
Submit a coaching log – Work From Home (Return to Site Only)



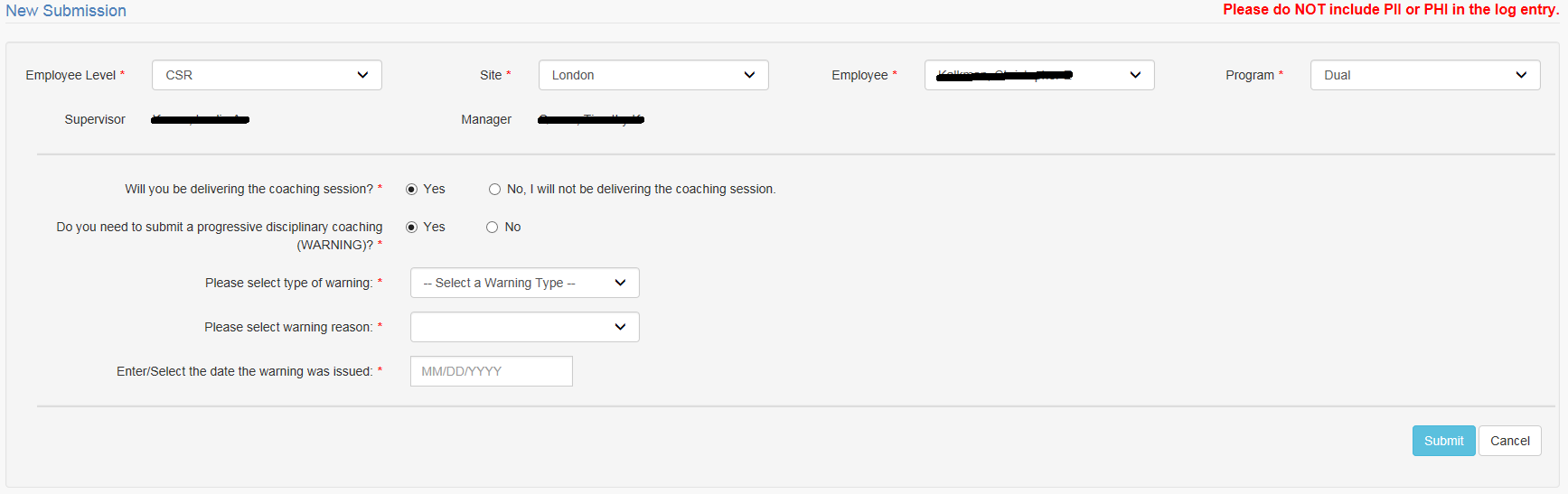
Submit a coaching log – Claims View (Medicare Only)



Quality:



Submit as a warning log:



* 1. Web Page Invoked Events

| Action | Processing & Result |
| --- | --- |
| Select a module from “Employee Level:” dropdown | Ajax call is made to reset the page.  Controller: NewSubmission  Action: ResetPage  If the selected module is other than “CSR” and “Training”, the page displays populated Employee dropdown and Program dropdown;  If the select module is “CSR”, the page displays Site dropdown (with all active sites);  If the selected module is “Training”, the page displays populated Employee dropdown and Behavior dropdown. |
| Select a site from “Site:” dropdown | Controller: NewSubmission  Action: HandleSiteChanged  Display populated Employee dropdown (All CSRs for the selected site) and Program dropdown. |
| Select an employee from “Employee” dropdown | Controller: NewSubmission  Action: GetMgtInfo  Display Supervisor name and manager name of the selected employee. |
| Select employee(s) from “Employee” dual list box | Check if the number of selected employees has reached the limit (100 for coaching log, and 1 for warning log);  If it reaches the limit, display warning message. |
| Click “Yes” for “Will you be delivering the coaching session?” | Controller: NewSubmission  Action: ResetPageBottom  Page displays the rest of the questions required for the submission:  Do you need to submit a progressive disciplinary coaching (WARNING)? (*Note: this displays only if the user is the selected employee’s supervisor);*  Enter/Select the date of coaching;  Is this a Customer Service Escalation (CSE), (*Note: this is for CSR module only);*  Select the Type of Coaching from the Categories;  Provide details of the behavior to be coached;  Provide the details from the coaching session including action plans developed;  How was the coaching opportunity identified;  Is there a Call Record associated with the coaching |
| Click “Yes” for “Do you need to submit a progressive disciplinary coaching (WARNING)?” | Controller: NewSubmission  Action: ResetPageBottom  Page displays the rest of the questions required for the warning log submission:  Please select type of warning;  Pelase select warning reason;  Enter/Select the date the warning was issued. |
| Click “No” for “Will you be delivering the coaching session?” | Controller: NewSubmission  Action: ResetPageBottom  Same as “Yes”, except not displaying question “Provide the details from the coaching session including action plans developed”. |
| Click “Yes” for “Is this a Customer Service Escalation (CSE)?” | Controller: NewSubmission  Action: LoadCoachingReasons  Coaching Reasons section will be refreshed. |
| Select a Coaching reason by checking the checkbox | Controller: NewSubmission  Action: HandleCoachingReasonClicked  Display sub coaching reason dropdown and “Opportunity”, “Reinforcement” radio buttons for the selected Coaching reason. |
| UnSelect a Coaching reason by unchecking the checkbox | Controller: NewSubmission  Action: HandleCoachingReasonClicked  Hide sub coaching reason dropdown and “Opportunity”, “Reinforcement” radio buttons for the selected Coaching reason. |
| Select Coaching reason “Work From Home(Return to Site Only)” by checking the checkbox | Javascript to show:  Replace “Provide details of the behavior to be coached:” text area with the following:  CCO employees who participate in the CCO Work From Home are obligated to comply with all Maximus policies and procedures. The purpose of this eCL is to notify you that your CCO Remote Work Agreement is being rescinded.  Effective  you will be required to report to work at the site. You will be reporting to . Any wages adjustments that were completed based on your remote status and the county you live in will be adjusted to reflect the location you are working and your position.  Any equipment you have received for the Work From Home assignment should be returned to your supervisor on your first day of reporting to the site.  Maximus anticipates that a mutually beneficial employment relationship will continue as you work at the site. |
| Unselect Coaching reason “Work From Home(Return to Site Only)” by unchecking the checkbox | Javascript to show:  “Provide details of the behavior to be coached:” editable text area. |
| Select “Yes” for “Is follow-up required?” | Javascript to show:  Follow-up date textbox, and a calendar icon;  Note: Follow-up date must be within 30 days of the submission date. |
| Select “No” for “Is follow-up required?” | Javascrip to hide:  Follow-up date textbox, and the calendar icon |
| Select “Yes” for “Is there a Call Record associated with the coaching?” | Javascript to show:  Call Type dropdown, and a text box for entering Call ID |
| Select “No” for “Is there a Call Record associated with the coaching?” | Javascript to hide:  Call Type dropdown, and a text box for entering Call ID |
| Click Submit button | Controller: NewSubmission  Action: Save |

1. **Stored Procedures**
   1. sp\_select\_employee\_details
   2. sp\_select\_modules\_by\_job\_code
   3. sp\_select\_employees\_by\_module\_and\_site
   4. sp\_select\_programs
   5. sp\_select\_behaviors
   6. sp\_select\_coachingreasons\_by\_module
   7. sp\_select\_source\_by\_module
   8. sp\_select\_subcoachingreasons\_by\_reason
   9. sp\_select\_values\_by\_reason
   10. sp\_select\_callid\_by\_module
   11. sp\_select\_email\_attributes
   12. sp\_select\_rec\_employee\_hierarchy
   13. sp\_insertinto\_coaching\_log

Refer CCO\_eCoaching\_Log\_Database\_DD.docx for details.