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Detail Design: CCO eCoaching Log – Review

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Prepared by: Lili Huang Date: 06/20/2018

Department: FCD

Change History Log

| Date | Change Description | Author |
| --- | --- | --- |
| 06/20/2018 | Initial Revision – TFS 11388 | Lili Huang |
| 07/30/2018 | TFS 11577 – New feed file (PBH) for CSRs who took inappropriate action;  Added:  6. Logic to determine next status;  Updated:  7. Instruction Text | Lili Huang |
|  |  |  |

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1. **Description**

This module allows authorized users to view or complete individual or team logs. It also allows the authorized users to view their submitted logs.

Display Review form as read only if:

1. **Historical Dashboard:**

User submitted the log, OR

User is the log’s employee, OR

User is the supervisor, OR

User is the manager, OR

User has a role as “ECL” in Historical\_Dashboard\_ACL table (for coaching logs only), OR

User has a role as Senior Manager, OR

User is from Human Resource (with job code starting with WHHR or WHER or WHRC);

1. **My Dashboard:**

My Submission section: users who submitted the log, OR

Warning Logs section: same as Historical Dashboard, OR

User is not the supervisor or re-assigned to, and the log doesn’t require research or CSE determination, OR

Completed logs

1. **Survey:**

User is the log’s employee

Display Review form as editable if:

1. **My Dashboard:**

Pending Coaching Logs, and user is the supervisor or re-assigned to or the log’s employee

Authorized users enter Review page by clicking any log name in the log list either from My Dashboard, Historical Dashboard, or Survey page.

1. **Business Logic – ReviewController.cs**

User clicks [Log Name] link:

* Check if the user has access to view the selected log details;

If user is not authorized, redirect user to unauthorized page;

Else call stored procedure sp\_SelectReviewFrom\_Coaching\_Log to get log details

* If current page is Historical Dashboard or Survey

Display log details as Read Only in modal (\_ViewCoachingLog.cshtml if coaching log; or \_ViewWarningLog otherwise)

* If current page is My Dashboard

Display either Pending Review or Pending Acknowledgement or Pending Research, or Pending CSE accordingly. See section “5. Logic to determine pending form type” for details.

User clicks Submit button:

* Validate form fields; See section 3.1.5 Web Page Fields for details.

If validation passes,

Update the reviewed log in database;

Close log detail modal dialog;

Refresh log list section on My Dashboard page.

Else display validation errors

User clicks Close button:

* Close log detail modal dialog;

1. **Page details**
   1. Views\Review\\_ReviewCoachingHome.cshtml, \_ViewWarningLog.cshtml
      1. Razor pages comprising Web Page

\_AcknowledgeCoaching.cshtml

\_ReviewCoaching.cshtml

\_ReviewCoachingCse.cshtml

\_ReviewCoachingFinal.cshtml

\_ReviewCoachingHome.cshtml

\_ReivewCoachingPending.cshtml

\_ReviewCoachingResearch.cshtml

\_Unauthorized.cshtml

\_ViewCoachingLog.cshtml

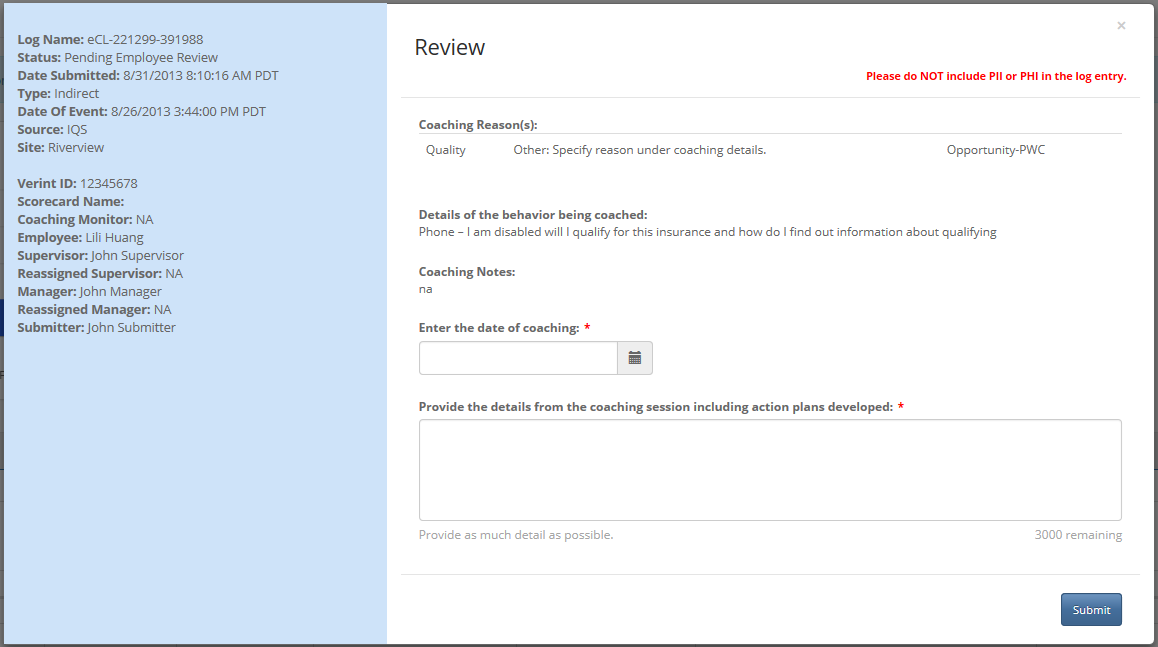
\_ViewWarningLog.cshtml

* + 1. Layout Page

Views\Shared\\_Layoutcshtml

* + 1. Screenshot

**Review - Review Pending Form (editable):**

****

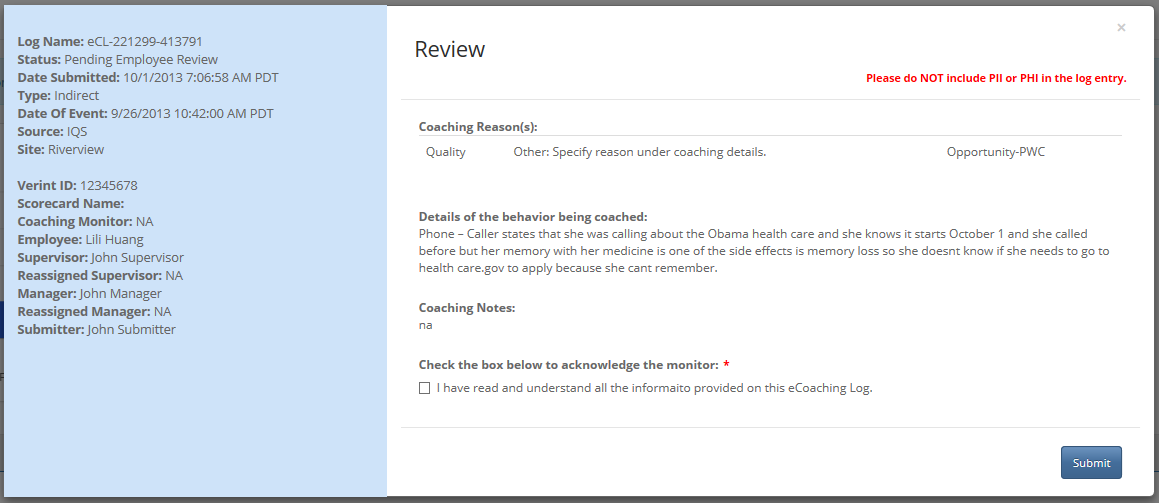
**Review - Acknowledge Pending Form (editable) – User is the log’s employee, and the log is reinforcement:**

****

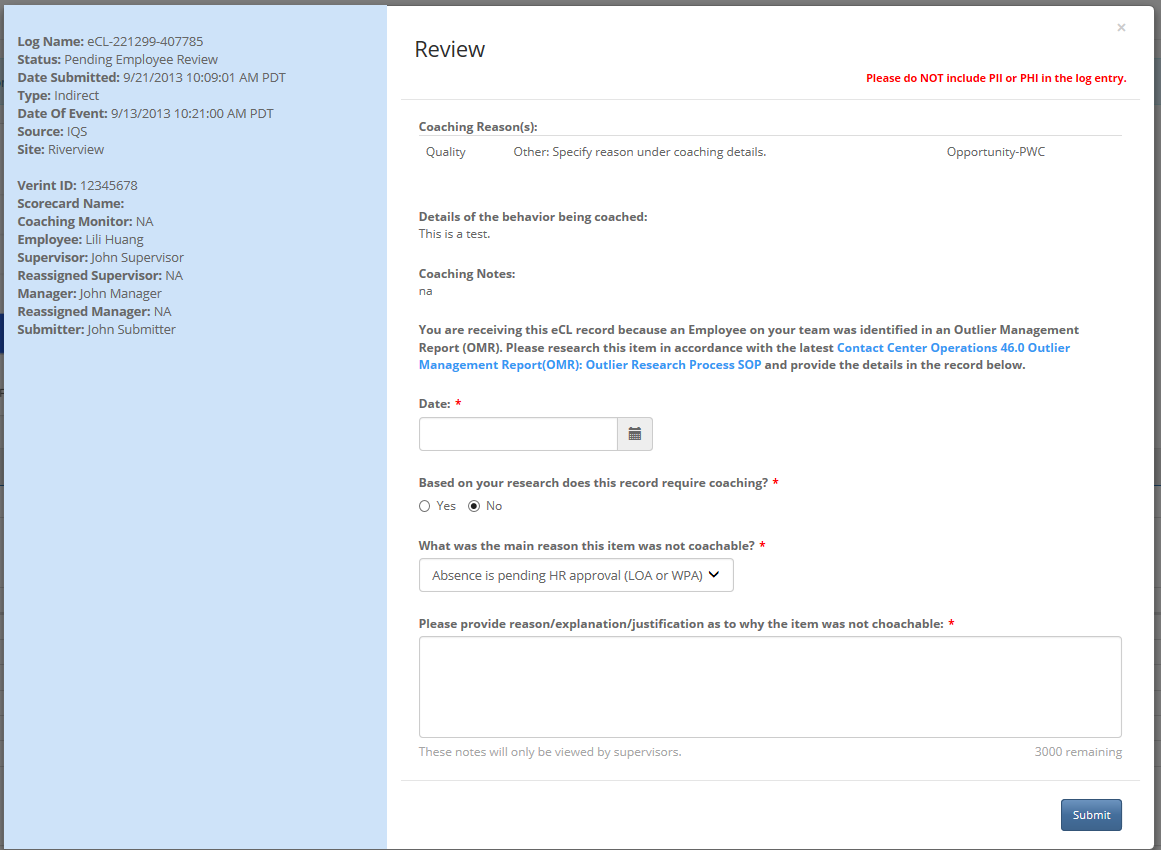
**Review - Acknowledge Pending Form (editable) – User is the log’s employee, and the log is opportunity:**

****

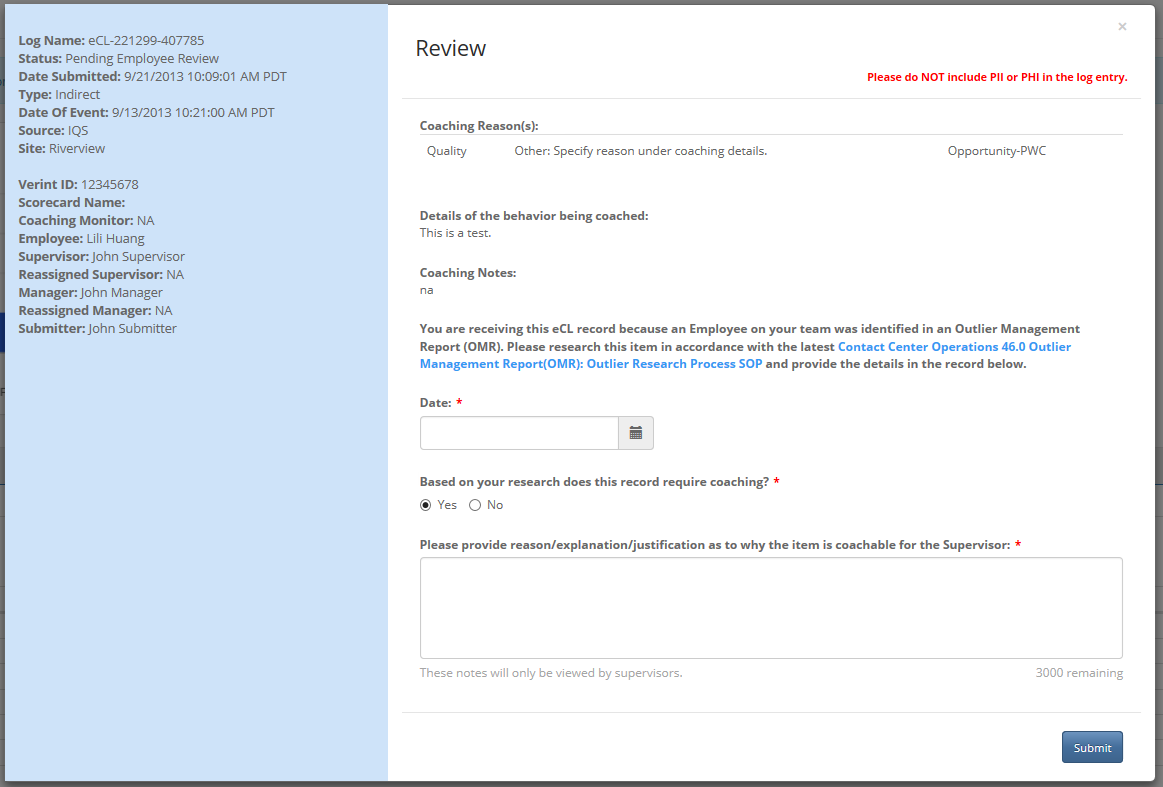
**Review - Acknowledge Pending Form (editable) – User is the supervisor, and the log is reinforcement:**

****

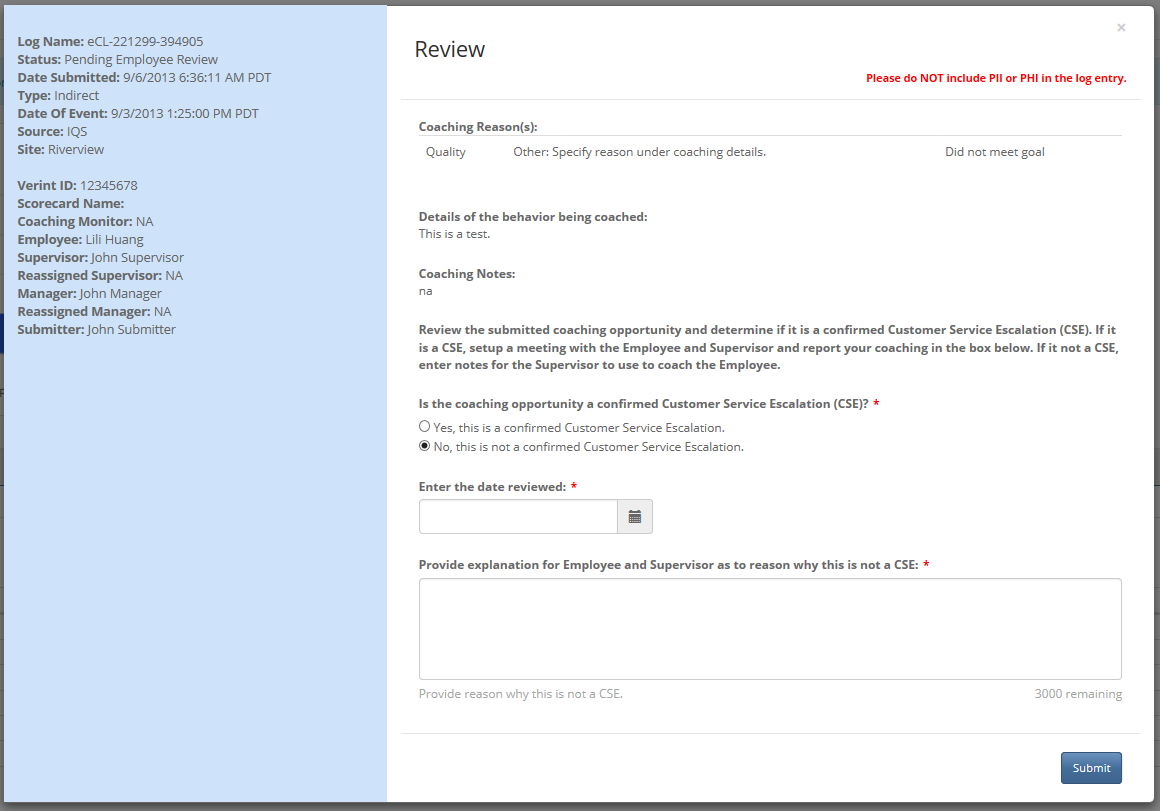
**Review – Research Pending Form (editable) – Coaching not required:**

****

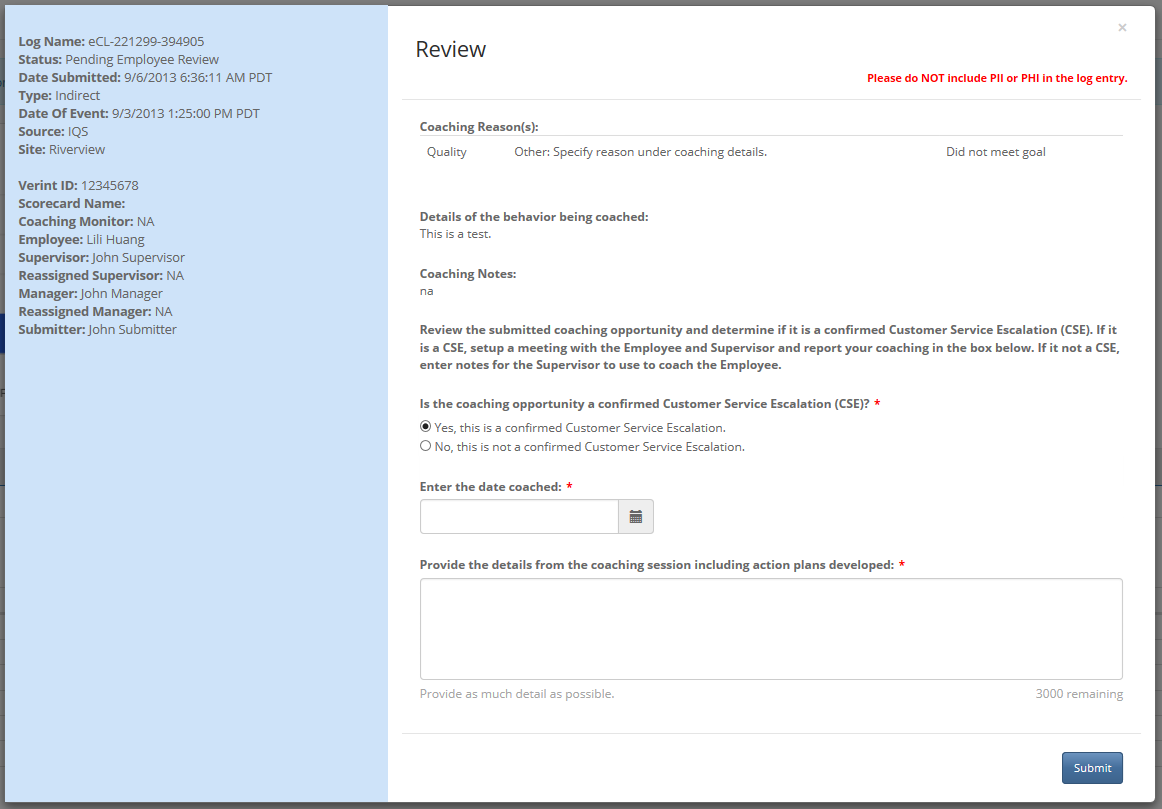
**Review – Research Pending Form (editable) – Coaching required:**

****

**Review – CSE Pending Form (editable) – Not CSE:**

****

**Review – CSE Pending Form (editable) – Yes, CSE:**

****

**Review – read only – Coaching Log:**

****

**Review – read only – Warning Log:**

****

**Unauthorized to view log details:**



* + 1. Web Page Invoked Events

| Action | Processing & Result |
| --- | --- |
| Click Submit button | Controller: Review  Action: Save  Validates all form fields;  If valid, Save to database; Close Review Modal dialog; Refresh log list;  Else, display validation error message; |

* + 1. Web Page Fields

|  |  |  |  |
| --- | --- | --- | --- |
| Type | Display Text | Data Source | Validation (Show/Hide) |
| **Coaching Information displayed on left (non-editable) - \_CoachingLogInfo.cshtml:** | | | |
| Label | Log Name: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Status: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Date Submitted: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Type: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Date of Coaching: |  | Display if log type is “Direct” |
| Text |  | Coaching\_Log |
| Label | Date of Event: |  | Display if log type is “Indirect” |
| Text |  | Coaching\_Log |
| Label | Source: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Site: |  |  |
| Text |  | Coaching\_Log  Dim\_Site |  |
| Label | Verint ID: |  | Display if from verint |
| Text |  | Coaching\_Log |
| Label | Scorecard Name: |  |
| Text |  | Coaching\_Log |
| Label | Coaching Monitor: | Coaching\_Log |
| Text |  | Coaching\_Log |
| Label | Avoke ID: |  | Display if from analytics |
| Text |  | Coaching\_Log |  |
| Label | NGD Activity ID: |  | Display if from NGD |
| Text |  | Coaching\_Log |
| Label | Universal CallID: |  | Display if it has UC ID |
| Text |  | Coaching\_Log |
| Label | Employee: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Supervisor: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Reassigned Supervisor: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Manager: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Reassigned Manager |  |  |
| Text |  | Coaching\_Log |  |
| Label | Submitter: |  |  |
| Text |  | Coaching\_Log |  |
| **End – Coaching Information displayed on left** | | | |
| **Coaching Information displayed on right:** | | | |
| Label | Final |  | Display if log is completed |
| Label | Review |  | Display if log is pending |
| Label | Please do NOT include PII or PHI in the log entery. |  | Display if log is editable (User is supervisor or employee of the log) and display in red |
| Label: | Coaching Reason(s): |  |  |
| Text |  | Coaching\_Log | Non-editable |
| Label: | Details of the behavior being coached: |  |  |
| Text |  | Coaching\_Log | Non-editable |
| Label | Notes from Manager: |  |  |
| Text |  | Coaching\_Log | Non-editable |
| Label | Coaching Notes: |  |  |
| Text |  | Coaching\_Log | Non-editable |
| ***Start - Acknowledge Pending Form*** | | | |
| Hidden | LogId |  |  |
| Hidden | IsAcknowledgeForm |  |  |
| Label | Check the box below to acknowledge the monitor: |  | Display if log is reinforcement |
| Label | Check the box below to acknowledge the coaching opportunity: |  | Display if log is opportunity |
| Label | I have read and understand all the information provided on this eCoaching Log. |  |  |
| Checkbox |  |  | Required |
| Label | Please select one of the comments below for the log: |  | Display if user is the employee and acknowledges a DTT log |
| Dropdown | ATT Updated - with Approved Absence  ATT Updated - with Unapproved Absence  ATT Not Updated - SWP notified that Empower is inaccurate  ATT Not Updated and Empower will not be updated  ATT Not Updated - CSR Termed  CSR on a Leave of Absence  Absence is pending HR approval (LOA or WPA) | Reasons\_By\_ReportCode |
| Label | Provide any comments or feedback below: |  | Display if user is the employee and acknowledges a non DTT log.  Maximum 3000 |
| Input textarea |  |  |
| Label | Provide as much detail as possible. |  |  |
| Label | 3000 remaining |  | As user types, the number of remaining dynamically changes |
| Button | Submit |  |  |
| ***End – Acknowledge Pending Form*** | | | |
| ***Start - Review Pending Form*** | | | |
| Text |  |  | Instruction text, see section “6. Instruction Text” for details. |
| Hidden | LogId |  |  |
| Hidden | FormName |  |  |
| Hidden | ModuleName |  |  |
| Hidden | StatusId |  |  |
| Hidden | SupervisorEmail |  |  |
| Hidden | ManagerEmail |  |  |
| Hidden | SupervisorEmpId |  |  |
| Hidden | ManagerEmpId |  |  |
| Hidden | IsRegularPendingForm |  |  |
| Label | Enter the date of coaching: |  |  |
| Input text |  |  | Must be a valid past or current date. |
| Icon | Glyphicon-calendar |  |  |
| Label | Provide the details from the coaching session including action plans developed: |  |  |
| Input textarea |  |  | Required  Maximum 3000 |
| Label | Provide as much detail as possible. |  |  |
| Label | 3000 remaining |  | As user types, the number of remaining dynamically changes |
| Button | Submit |  |  |
| ***End - Review Pending Form*** | | | |
| ***Start – Research Pending Form*** | | | |
| Hidden | IsResearchPendingForm |  |  |
| Hidden | LogId |  |  |
| Label | You are receiving this eCL record because an Employee on your team was identified in an Outlier Management Report (OMR). Please research this item in accordance with the latest Contact Center Operations 46.0 Outlier Management Report(OMR): Outlier Research Process SOP and provide the details in the record below."; |  | “Contact Center Operations 46.0 Outlier Management Report(OMR): Outlier Research Process SOP” will be the following hyperlink:  https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx |
| Label | Date: |  |  |
| Input text |  |  | Must be a valid past or current date. |
| Label | Based on your research does this record require coaching? |  |  |
| Radio Button | Yes  No |  | Default to “No” |
| Label | What was the main reason this item was not coachable? |  | Display if “No” is selected;  Dropdown:  Required  Input textarea:  maximum characters: 3000  Required |
| Dropdown | **If OMR/BRL or OMR/BRN:**  Approved accommodation on file  Other  **If OMR/IAE:**  Agent no longer employed or on LOA  Escalation was appropriate  ISG or Supervisor told agent to escalate  Not enough information to coach  Other  **Otherwise:**  Other | Reasons\_By\_ReportCode |
| Label | Please provide reason/explanation/justification as to why the item was not coachable: |  |
| Input textarea |  |  |
| Label | Please provide reason/explanation/justification as to why the item is coachable for the Supervisor: |  | If “Yes” is selected.  Dropdown:  Required  Input textarea:  maximum characters: 3000  Required |
| Input textarea |  |  |
| Label | These notes will only be viewed by supervisors. |  |  |
| Label | 3000 remaining |  | As user types, the number of remaining dynamically changes |
| Button | Submit |  |  |
| ***End – Research Pending Form*** | | | |
| ***Start – CSE Pending Form*** | | | |
| Hidden | IsCsePendingForm |  |  |
| Hidden | LogId |  |  |
| Hidden | ModuleId |  |  |
| Label | Review the submitted coaching opportunity and determine if it is a confirmed Customer Service Escalation (CSE). If it is a CSE, setup a meeting with the Employee and Supervisor and report your coaching in the box below. If it not a CSE, enter notes for the Supervisor to use to coach the Employee. |  |  |
| Label | Is the coaching opportunity a confirmed Customer Service Escalation (CSE)? |  |  |
| Radio Button | Yes, this is a confirmed Customer Service Escalation.  No, this is not a confirmed Customer Service Escalation. |  |  |
| Label | Enter the date coached: |  | Display if “Yes” is selected.  Date must be a valid past or current date.  Required.  Input area:  Maximum characters: 3000  Required |
| Input text |  |  |
| Icon | Glyphicon-calendar |  |
| Label | Provide the details from the coaching session including action plans developed: |  |
| Input textarea |  |  |
| Label | Enter the date reviewed: |  | Display if “No” is selected.  Date must be a valid past or current date.  Required.  Input area:  Maximum characters: 3000  Required |
| Input text |  |  |
| Icon | Glyphicon-calendar |  |
| Label | Provide explanation for Employee and Supervisor as to reason why this is not a CSE: |  |
| Input textarea |  |  |
| Label | Provide as much detail as possible. |  |  |
| Label | 3000 remaining |  | As user types, the number of remaining dynamically changes |
| Button | Submit |  |  |
| ***End – CSE Pending Form*** | | | |
| ***Start – View Coaching (read only)*** | | | |
| Label | Final |  | Display if log is completed |
| Label | Review |  | Display if log is pending |
| Label: | Coaching Reason(s): |  |  |
| Text |  | Coaching\_Log | Non-editable |
| Label: | Details of the behavior being coached: |  |  |
| Text |  | Coaching\_Log | Non-editable |
| Label | Coaching Opportunity was a confirmed Customer Service Escalation. |  | Display if confirmed CSE. |
| Label | Coaching Opportunity was not a confirmed Customer Service Escalation. |  | Display if confirmed NOT CSE. |
| Label | Manager Notes: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Manager Review Information: |  |  |
| Label | Reviewd and acknowledged Quality Monitor on |  |  |
| Text |  | MgrReviewAutoDate |  |
| Label | Coaching Notes: |  |  |
| Text |  | Coaching\_Log |  |
| Label | Supervisor Reviw Information: |  |  |
| Label | Reviewd and acknowledged Quality Monitor on |  |  |
| Text |  | SupReviewedAutoDate |  |
| Label | Employee Review Information: |  |  |
| Text |  | EmployeeName |  |
| Label | Reviewed and acknowledged Quality Monitor On |  | Display if IQS and Completed |
| Label | Reviewed and acknowledged Coaching On |  | Display if Not IQS and Not Completed |
| Text |  | EmloyeeReviewDate |  |
| Button | Close |  |  |
| ***End – View Coaching (read only)*** | | | |
| **End – Coaching Information displayed on right.** | | | |
| **Warning Information displayed on left (non-editable) - \_WarningLogInfo.cshtml:** | | | |
| Label | FormID: | Warning\_Log |  |
| Text |  | Warning\_Log |  |
| Label | Status: |  |  |
| Text |  | Warning\_Log |  |
| Label | Date Submitted: |  |  |
| Text |  | Warning\_Log |  |
| Label | Type: |  |  |
| Text |  | Warning\_Log |  |
| Label | Date the warning was issued: |  |  |
| Text |  | Warning\_Log |  |
| Label | Source: |  |  |
| Text |  | Warning\_Log |  |
| Label | Site: |  |  |
| Text |  | Warning\_Log |  |
| Label | Employee: |  |  |
| Text |  | Warning\_Log |  |
| Label | Supervisor: |  |  |
| Text |  | Warning\_Log |  |
| Label | Manager: |  |  |
| Text |  | Warning\_Log |  |
| Label | Submitter: |  |  |
| Text |  | Warning\_Log |  |
| **End – Warning Information displayed on left (non-editable) - \_ViewWarningLog.cshtml.** | | | |
| ***Warning Information displayed on right:*** | | | |
| Label: | Coaching Reason(s): |  |  |
| Text |  | Coaching\_Log | Non-editable |
| Button | Close |  |  |
| ***End – Warning Information displayed on right.*** | | | |

1. **Stored Procedures**
   1. sp\_SelectReviewFrom\_Coaching\_Log
   2. sp\_SelectReviewFrom\_Coaching\_Log\_Reasons
   3. sp\_SelectReviewFrom\_Warning\_Log\_Reasons
   4. sp\_Update\_Review\_Coaching\_Log\_Suerpvisor\_Pending
   5. sp\_Update\_Review\_Coaching\_Log\_Supervisor\_Acknowledge
   6. sp\_Update\_Review\_Coaching\_Log\_Employee\_Pending
   7. sp\_Update\_Review\_Coaching\_Log\_Employee\_Acknowledge
   8. sp\_Update\_Review\_Coaching\_Log\_Manager\_Pending\_Research
   9. sp\_Update\_Review\_Coaching\_Log\_Manager\_Pending\_CSE

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

1. **Logic to determine pending form type**
   1. Pending Acknowledgement

User is Manager

* Pending acknowledgement

User is the Supervisor or reassigned to

* Pending supervisor review and the employee has acknowledged, OR
* Pending acknowledgement;

User is the employee

* Pending employee review, OR
* Pending acknowledgement
  1. Pending Research

User is the Supervisor or reassigned to

* Pending supervisor review, and the log is one of the following:
* ETS/OAE
* ETS/OAS
* OMR/IAT
* OMR/IAE
* Training Shor Duration
* Training Overdue
* BRN or BRL

User is the Manager, or Manager when this low CSAT log was submitted, or reassigned to

* Pending manager review, and Current Coaching Initiative or OMR Exception or low CSAT
  1. Pending CSE

User is the Manager or Manager when this low CSAT log was submitted or reassigned to

* Pending manager review, and not Current Coaching Initiative not OMR Exception not low CSAT.
  1. Pending Review

None of the above.

1. **Logic to determine next status**
   1. Pending Acknowledgement

For “Opportunity” logs, next status will be “Completed”;

Otherwise (Reinforcement logs):

* If user is the employee of the log,
* If supervisor has acknowledge, then next status will be “Completed”;
* If supervisor has not acknowledged, then next status will be:
* “Pending Supervisor Review” for CSR and TRAINING modules;
* “Pending Manager Review” for SUPERVISOR module;
* “Pending Quality Lead Review” for QUALITY module.
* If user is NOT the employee of the log,
* If current status is “Pending Acknowledgement”, then next status will be “Pending Employee Reviw”;
* Otherwise, next status will be “Completed”.
  1. Pending Research
* If Coaching is NOT required, then next status will be “Inactive”;
* Otherwise:
* If CSR or TRAINING module, next status will be
* “Pending Supervisor Review” if the log is Current Coaching Initiative or OMR Exception or Low CSAT;
* “Pending Employee Review” if the log is IAE or IAEF or IAT or OAE or Training Short Duration or Training Overdue or BRL or BRN;
* “Pending Employee Review” if user is the Supervisor or reassigned to;
* If SUPERVISOR module, next status will be
* “Pending Manager Review” if the log is Current Coaching Initiative or OMR Exception;
* “Pending Employee Review” otherwise;
* If QUALITY module, next status will be
* “Pending Quality Lead Review” if the log is Current Coaching Initiative or OMR Exception;
* “Pending Employee Review” otherwise;
* For all other modules, next status will be “Pending Employee Review”
  1. Pending CSE

Next status will be:

* “Pending Supervisor Review” for CSR, TRAINING modules;
* “Pending Manager Review” for SUPERVISOR module;
* “Pending Quality Lead Review” for QUALITY module.
  1. Pending Review

Next status will be “Pending Employee Review”.

1. **Instruction text**
   1. Pending CSE

Review the submitted coaching opportunity and determine if it is a confirmed Customer Service Escalation (CSE). If it is a CSE, setup a meeting with the Employee and Supervisor and report your coaching in the box below. If it not a CSE, enter notes for the Supervisor to use to coach the Employee.

* 1. Pending Research

You are receiving this eCL record because an Employee on your team was identified in an Outlier Management Report (OMR). Please research this item in accordance with the latest <a href='https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx' target='\_blank'>" +

Contact Center Operations 46.0 Outlier Management Report (OMR): Outlier Research Process SOP</a> and provide the details in the record below.

* 1. Pending Review
* **OMR Short Call**

You are receiving this eCL because you have been assigned to listen to and provide feedback on calls that have been identified as having a short duration. Details of each call can be found within the Performance Report Catalog by clicking <a href='https://cco.gdit.com/bi/ReportsCatalog/TQC\_ShortCall/Forms/AllItems.aspx' target='\_blank'>here</a>. Please review the calls and provide specific details on opportunities that requiring coaching.

* **Low CSAT**

You are receiving this eCL because you have been assigned to listen to and provide feedback on a call that was identified as having low customer satisfaction. Please review the call from a PPoM perspective and provide details on the specific opportunities requiring coaching in the record below.

* **Training Short Duration**

CSRs are scheduled for specific times in Empower to ensure understanding of training materials presented. It is important to utilize the timeframe allotted to successfully understand the training content. Please be aware that the scheduled timeframe is a metric which has been agreed upon by CCO and CMS. You should use all or the majority of the scheduled time to review each eLearning module assigned.

* **Training Overdue**

The above training is now overdue. Please have the training completed and provide coaching on the specific reasons it was overdue.

* **Quality High 5 Club**

Customer satisfaction is critical to our success; therefore, to help gauge our performance, every caller is offered the option to complete a Customer Satisfaction (CSAT) survey. Using a scale from one to five, callers are able to rate their overall satisfaction. Top box, or a rating of 5, indicates the caller was extremely satisfied! Thank you for taking good care of your callers; you make a difference for each caller AND for the CCO!

* **Quality KUDO CSR**

Congratulations - you received a Kudos! Click <a href='https://cco.gdit.com/Connection/Pages/KudosCentral.aspx' target='\_blank'>here</a> to take a listen to what a recent caller had to say about your customer service.

* **Quality KUDO Supervisor**

Click <a href='https://cco.gdit.com/Connection/Pages/KudosCentral.aspx' target='\_blank'>here</a> to listen to CSR kudos.

* **OMR Break Time Exceeded**

You are receiving this eCL record because an Employee on your team was identified in a Break Outlier Report. Please review the <b><a href='https://cco.gdit.com/bi/ReportsCatalog/AvayaBreakPolicyReporting/Forms/AllItems.aspx' target='\_blank'>ETS Breaks Outlier Report</a>,

the ETS entries</b>, and refer to HCSD-POL-HR-MISC-08 Break Time Policy and Break Policy Reference guide for additional information and provide the details in the record below.

* **Scorecard MSR**

To review your full details, please visit the <a href='https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx' target='\_blank'>CCO Performance Scorecard</a>.

If you have any questions, please see your supervisor.

* **Scorecard MSRS**

To review your full details, please visit the <a href='https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx' target='\_blank'>CCO Performance Scorecard</a>.

If you have any questions, please <a href='https://cco.gdit.com/Reports/Performance\_Scorecard/Lists/Scorecard\_Escalated\_Issues\_Log/NewIssue.aspx' target='\_blank'>submit an escalation</a> via the

<a href='https://cco.gdit.com/Reports/Performance\_Scorecard/default.aspx' target='\_blank'>CCO Performance Scorecard Information Station</a>

SharePoint site.

* **ETS/HNC, ETS/ICC**

Click <a href='https://cco.gdit.com/Initiatives/floorcheck/Timecard\_Compliance\_Reporting/Timcard%20Changes%20Reports/Forms/AllItems.aspx' target='\_blank'>here</a>

to view the report containing the details of these changes.

* **ETS/OAE**

You are receiving this eCL record because an Employee on your team was identified on the CCO TC Outstanding Actions report (also known as the TC Compliance Action report). Please research why the employee did not complete their timecard before the deadline laid out in the latest

<a href='https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx' target='\_blank'>CCO Performance Scorecard</a>. Contact Center Operations 3.06 Timecard Audit SOP

* **ETS/OAS**

You are receiving this eCL record because a Supervisor on your team was identified on the CCO TC Outstanding Actions report (also known as the TC Compliance Action report). Please research why the supervisor did not approve or reject their CSR’s timecard before the deadline laid out in the latest

<a href='https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx' target='\_blank'>CCO Performance Scorecard</a>. Contact Center Operations 3.06 Timecard Audit SOP.

* **OMR/PBH**

Be sure to check the Beneficiary Indicators applet on every call. If a message is on file, the CSR must follow protocol and review it to determine whether the information is applicable to the beneficiary’s reason for calling. However, the CSR must read and follow any messages related to the new Medicare card, regardless of the reason for the call. In addition to reading such messages, the CSR must be sure to log them as “read” to document that the information has been relayed to the caller.

Remember, it is critical that we follow through with the appropriate action(s) outlined in the CSR Notes portion of the Message Details applet. This includes checking and confirming whether the beneficiary’s correct mailing address is on file. Depending on whether the address is correct, the CSR will take one of the two following actions:

-If the address is correct, you must order a replacement card for the beneficiary using the “Medicare Card” button (even if they don’t think they need one).

-If the address is incorrect, you must refer the beneficiary to the Social Security Administration (SSA) using information in Agent Partner Search.

When reviewing this type of message, always take the appropriate steps as directed, regardless of the reason for the call. Failing to do so in these cases will result in the beneficiary not receiving his/her new Medicare card.