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

Detail Design: CCO eCoaching Log – Review

Non Quality Now

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Department:

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 |
| 12/03/2018 | TFS 12836 – OverTurned quality Appeal coaching log; | Lili Huang |
| 02/12/2019 | TFS 13511 - Coaching entry field appear for supervisor when in pending manager review status | Lili Huang |
| 02/25/2019 | TFS 13350 – Quality Now | Lili Huang |
| 05/15/2019 | TFS 14442 – Display MRS static text based on Source | Lili Huang |
| 05/31/2019 | TFS 14699 – Modify logic to handle short call logs  Plus: Cleanup | Lili Huang |
| 07/01/2019 | TFS 14850 – Review Page: Update GDIT links to corresponding MAXIMUS ones | Lili Huang |
| 08/16/2019 | TFS 15063 – Quality Bingo | Lili Huang |
| 08/22/2019 | TFS 15232 – Attendance Policy Earnback | Lili Huang |
| 8/28/2019 | TFS 15232 – Attendance Policy Earnback  Updated section 8: added condition | Lili Huang |
| 09/04/2019 | TFS 14679 – Follow-up Process | Lili Huang |
| 09/24/2019 | TFS 15601 – London Alternate Channel Bingo | Lili Huang |
| 12/09/2019 | TFS 15833 – Workflow change for warning logs  (“Pending Employee Review” 🡪 Completed) | Lili Huang |
| 03/23/2020 | TFS 16893 – Allow employees to enter comments to warnings | Lili Huang |
| 07/24/2020 | TFS 17803 – Update GDIT to MAXIMUS | Lili Huang |
| 07/31/2020 | TFS 17803 – Update GDIT to MAXIMUS  Updated performance scorecard url from vangent to current. | Lili Huang |
| 08/18/20202 | TFS 18176 – Allow senior manage to view log details.  Added section “6. Logic to determine who can view log details” | Lili Huang |
| 09/23/2020 | TFS 18449 – CSR Incentive Data Feeds (IDD) | Lili Huang |
| 05/24/2021 | TFS 21485 - Update alternate channel quality now compliance and mastery levels | Lili Huang |
| 06/29/2021 | TFS 22057- APS static text change;  Updated 9.3 Pending Review:  OTH/APS static text (updated 22 to 11) | Lili Huang |
| 08/06/2021 | TFS 22256 Quality Now Logs Enhancement;  Moved Quality Now related to “CCO\_eCoaching\_Log\_Review\_QualityNow\_DD.docx” | Lili Huang |
| 10/12/2021 | TFS 23137 – Quality – new coaching reason pfd and pfd date;  Updated 3.1.5. | Lili Huang |
| 03/10/2022 | TFS 24326 – eCL logs not displaying fields properly;  Updated screenshots;  Removed QN screenshots. | Lili Huang |
| 03/25/2022 | TFS 24370 - eCL-New data feed for Survey eCLs  Added  **“Survey – user is the supervisor or reassigned to, Pending Supervisor Review**  Please contact your survey point of contact and/or manager with any questions.” | Lili Huang |
| 04/10/2023 | TFS 26445 – Coaching audio issues.  Updated 9.3 Pending Review.  Removed Performance Scorecard static text.  Added Audio Issue static text. | Lili Huang |
| 10/03/2023 | TFS 27223 – Add Verint Call ID to Audio Coaching logs.  Updated 9.3.  Added Verint ID for Audio Issue static text. | Lili Huang |
| 11/27/2023 | TFS 27416 – NGD System login outside the shift.  Updated 9.3. | Lili Huang |
| 02/16/2024 | TFS 27695 – Subcontractor  Removed instruction/static text in section 9. | Lili Huang |
| 03/28/2024 | TFS 27928 – QN Olympics Rewards.  Added Quality Olympics Rewards screenshot | Lili Huang |
| 05/15/2024 | TFS 28208 – ISG | Lili Huang |
| 06/24/2024 | TFS 28333 - Motivate and Increase CSR-Level Promotions.  Updated 3.1.5 Web Page Fields | Lili Huang |
| 07/29/2024 | TFS 28468 – ASR.  Added screenshot:  Review – Research Review Pending Form (editable) – Follow-up NOT required.  Review – Research Review Pending Form (editable) – Follow-up required.  Updated 3.1.5 Web Page Fields | Research Pending Form | 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

The log is Pending Supervisor Review, and user is not the supervisor or re-assigned to, OR

The log is Pending Employee Review, and user is not the log’s employee, OR

The log is neither Pending Supervisor Review nor Pending Employee Review, OR

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**

User clicks [Log Name] link:

1. 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 Review page as Read Only; (\_ViewCoachingLog.cshtml if coaching log; or \_ViewWarningLog otherwise)

* If current page is My Dashboard

If Short Call

Load “Not valid behaviors” from database.

Load “Valid behaviors” from database.

Load short call list from database.

End If Short Call.

Determine Pending Form Type (See section 5 for details);

Determine Review Page display mode (Read Only vs Editable);

Display Review Page.

*Note:*

*See section “5. Logic to determine pending form type”.*

*See section “6. Logic to determine Review Page display mode”.*

Display Review Page.

User clicks Submit button:

1. 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:

1. Close log detail modal dialog.
2. **Page details**
   1. Views\Review\\_ReviewCoachingHome.cshtml, \_ViewWarningLog.cshtml
      1. Razor pages comprising Web Page

\_AcknowledgeCoaching.cshtml

\_ConfirmReviewShortCalls.cshtml

\_EmployeeReivewInfo.cshtml

\_Error.cshtml

\_ManagerReviewInfo.cshtml

\_Reasons.cshtml

\_ReviewCoaching.cshtml

\_ReviewCoachingCse.cshtml

\_ReviewCoachingHome.cshtml

\_ReivewCoachingPending.cshtml

\_ReviewCoachingResearch.cshtml

\_ReviewInfo.cshtml\_ReviewShortCalls.cshtml

\_Scorecards.xhtml

\_ShortCalls.cshtml

\_SupervisorReviewInfo.cshtml

\_Unauthorized.cshtml

\_ViewCoachingLog.cshtml

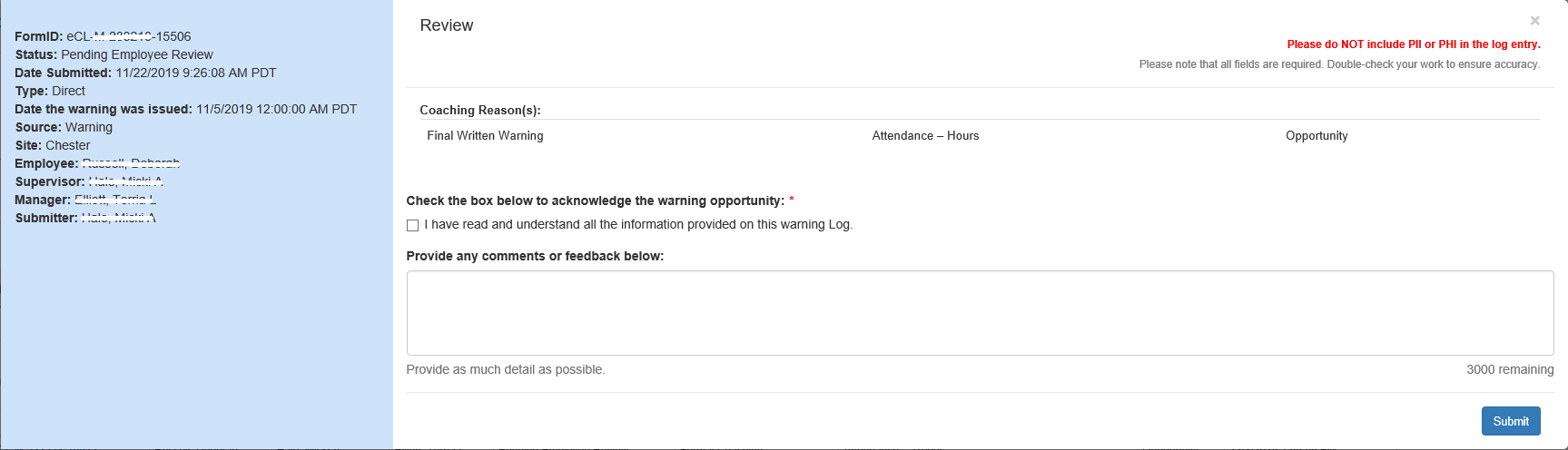
\_ViewWarningLog.cshtml

* + 1. Layout Page

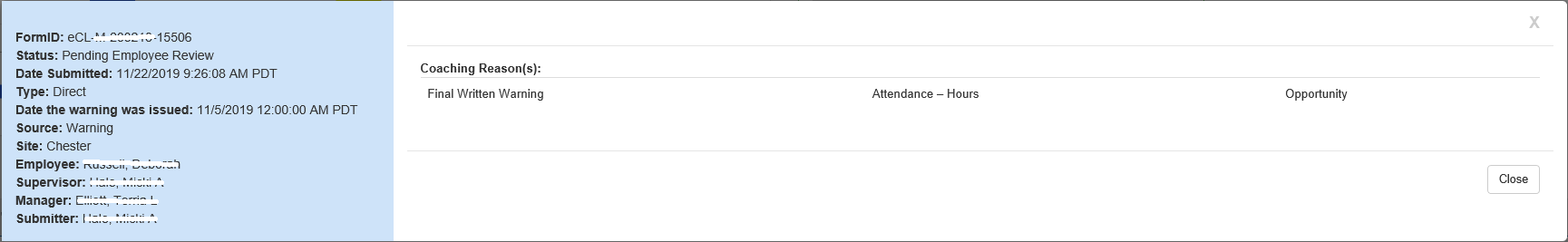
Views\Shared\\_Layoutcshtml

* + 1. Screenshot

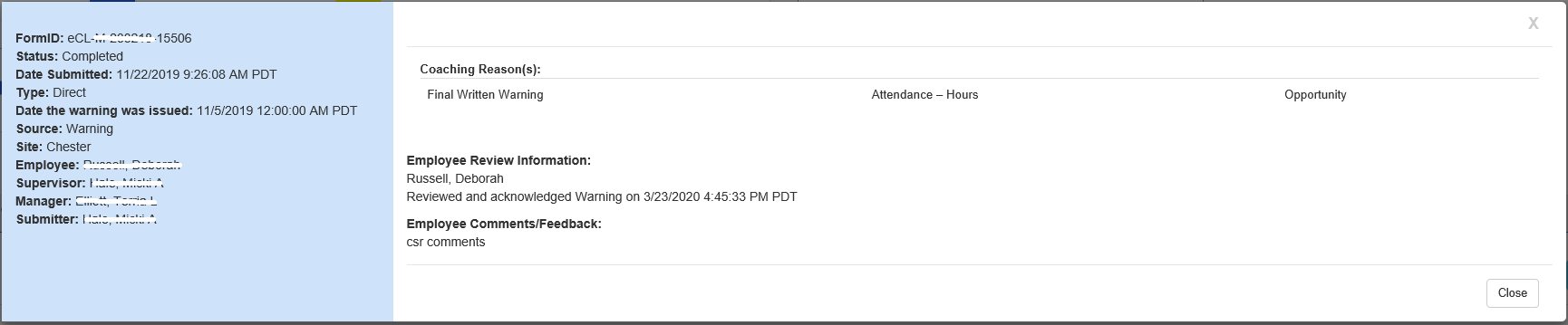
**Review – Warning log (Pending Employee Review) – Editable View - user is the employee of the log**

****

**Review – Warning log (Pending Employee Review) – Read Only View - User is the supervisor or manager of the employee**

****

**Review – Warning log (Completed) – Supervisor or manager of the employee View**

****

**Review – Regular 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 supervisoropportunity:**

****

**Review – Acknowledge Pending Form (editable) – User is the supervisor, and the log is OTA (OverTurned Appeal):**

****

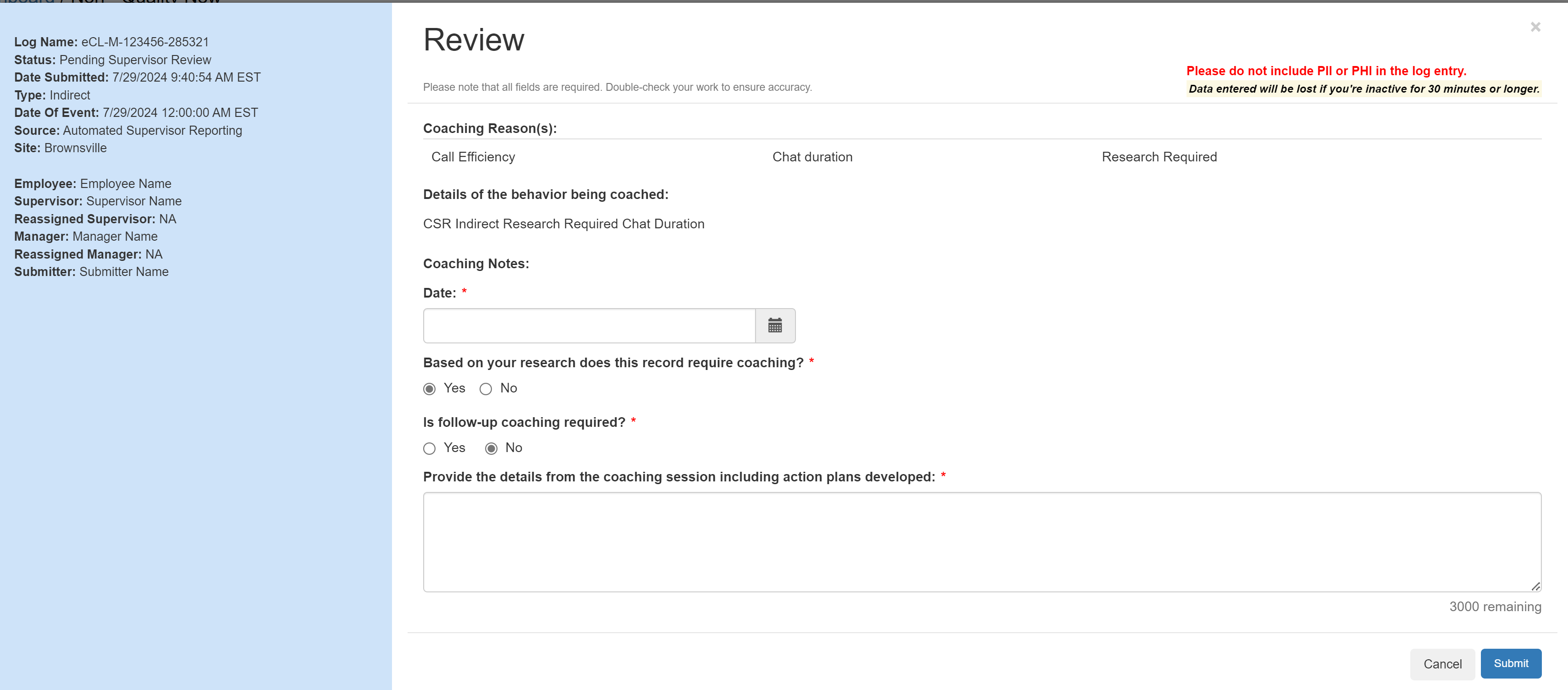
**Review – Research Review Pending Form (editable) – Coaching not required:**

****

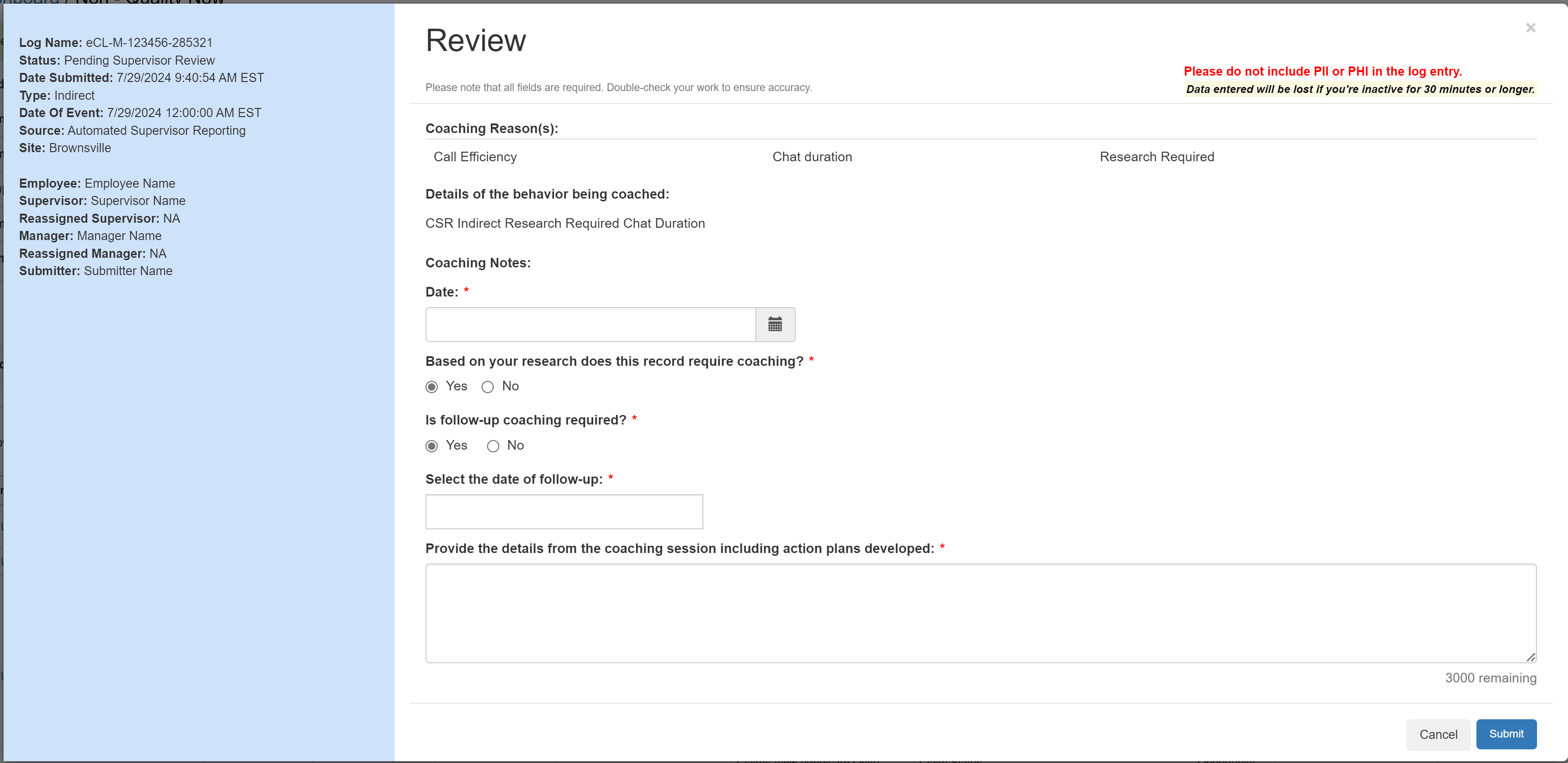
**Review – Research Review Pending Form (editable) – Coaching required:**

****

**Review – Research Review Pending Form (editable) – Follow-up NOT required:**

****

**Review – Research Review Pending Form (editable) – Follow-up required:**

****

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

****

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

****

**Review – Short Call – Supervisor form**

****

**Review – Short Call – Manager form**

****

****

**Review – Follow-up is required - Pending Supervisor Review –Supervisor View**

****

**Review – Follow-up is required - Pending Supervisor Review –Manager and Director View**

****

**Review – Follow-up is required - Pending Employee Review (before follow-up) – Employee View**

****

**Review – Follow-up is required - Pending Employee Review (before follow-up) –Supervisor, Manager, and Director View**

****

**Review – Follow-up is required – Pending Follow-up – Supervisor View**

****

**Review – Follow-up is required – Pending Follow-up – Manager and Director View**

****

**Review - Follow-up is required – Pending Employee Review (after follow-up) – Employee View**

****

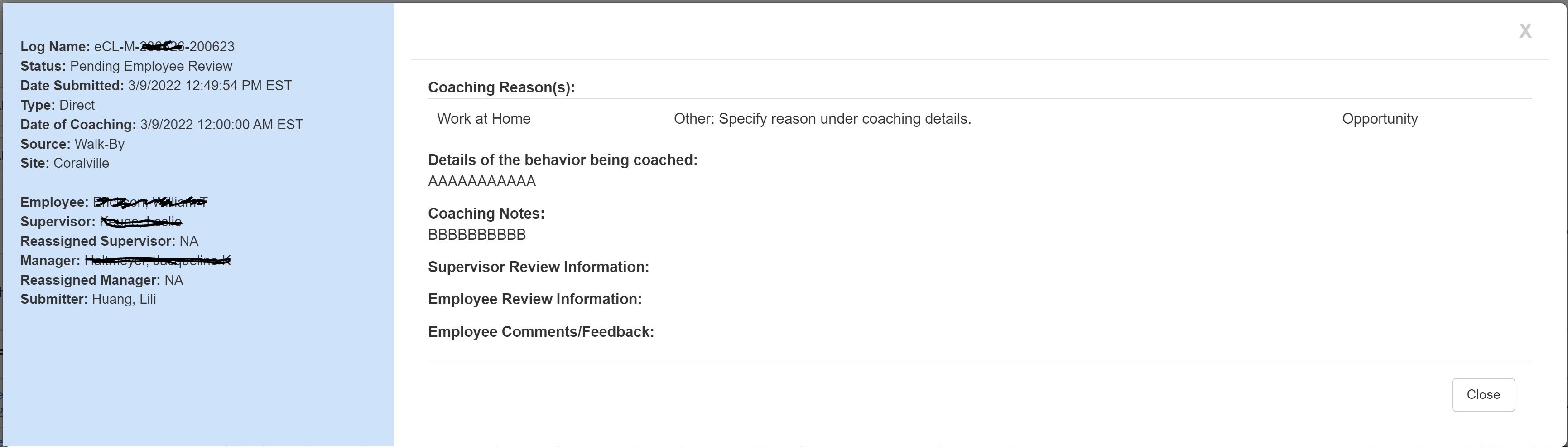
**Review - Follow-up is required – Pending Employee Review (after follow-up) – Supervisor, Manager, and Director View**

****

**Review - Follow-up is required – Completed**

****

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



**Review – read only – Warning Log:**

****

**Quality Olympics Rewards:**



**Unauthorized to view log detail:**



* + 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 |
| Text | PFD Completed Date: |  | Display if log reason is PFD. |
| 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 |
| 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: |  |  |
| Start – Short Calls | | | |
| Label: | The CSR has multiple short calls that exceed the threshold. Please coach the behavior so the CSR has fewer short calls. |  | Supervisors Only |
| Column Header | Verint Call Id |  |  |
| Valid |  |  |
| Behavior |  |  |
| Action |  |  |
| Coaching Notes |  | Display “Maximu characters: 3000” for Supervisors. |
| LSA Informed |  |  |
| Do You Agree? |  | Managers Only |
| Loop for each short call in this log | | | |
| Text | Verint Id in db |  |  |
| Checkbox |  |  | Supervisors Only |
| Text | Yes or No in db |  | Managers Only.  Non editable |
| Text | Action stored in database |  | Non editable.  For how to determine what action to display, reference DB DD. |
| Text Area |  |  | Supervisors Only |
| Text | Coaching Notes in db |  | Managers Only.  Non editable |
| Checkbox |  |  | Supervisors Only |
| Text | Yes or No in db |  | Managers Only.  Non editable |
| Radio button | Yes  No |  | Managers Only |
| Text Area | Enter Comments… |  | Managers Only.  And  If “No” is selected.  Required if “No” is selected. |
| Label | Dates: |  | Managers Only.  Required |
| Label | Provide comments below: |  | Managers Only.  Required |
| Label | 3000 remaining. |  | Managers Only; |
| Button | Submit |  |  |
| End - Loop for each short call in this log | | | |
| End – Short Calls | | | |
| 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 OR OTA (OverTurned Appeal) |
| Label | Check the box below to acknowledge the coaching opportunity: |  | Display if log is opportunity |
| Label | Check the box below to acknowledge the follow-up: |  | Display follow-up is required and completed by Supervisor |
| Label | I have read and understand all the information provided on this eCoaching Log. |  |  |
| Label | By checking this box, I indicate that I have reviewed this appeal and have taken the appropriate actions. |  | Display if log is OTA (OverTurned Appeal) |
| 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 the details from the coaching session including action plans developed: |  | Display if OTA (OverTurned Appeal) log. |
| 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 “8. Instruction Text” for details. |
| Hidden | LogId |  |  |
| Hidden | FormName |  |  |
| Hidden | ModuleName |  |  |
| Hidden | StatusId |  |  |
| Hidden | SupervisorEmail |  |  |
| Hidden | ManagerEmail |  |  |
| Hidden | SupervisorEmpId |  |  |
| Hidden | ManagerEmpId |  |  |
| Hidden | IsRegularPendingForm |  |  |
| If log is C-Path (Motivate and Increase CSR-Level Promotions), Pending Supervisor Review, and user is the reviewer | | | |
| Label | Is follow-up coaching required? |  |  |
| Radio Button | Yes  No |  | Required – must select one |
| Label | Select the date of follow-up: |  | Display if “Yes” is selected |
| Input |  | FollowupDueDate | Display if “Yes” is selected.  When user clicks the input field, display calendar for user to select a date (only the next 30 days are selectable). |
| End – if log is C-Path (Motivate and Increase CSR-Level Promotions), Pending Supervisor Review, and user is the reviewer, display follow up question. | | | |
| If log is C-Path, Pending Employee Review, and user is the employee of the log | | | |
| Label | Which of the following best describes your current attitude and outlook toward a future CSR promotion? |  |  |
| Dropdown |  | I am interested in gaining a promotion and will apply at the earliest opportunity  I am not interested in a promotion because I do not feel ready or qualified  I am not interested in a promotion because I am concerned about limited time off  I am not interested in a promotion because I am concerned about schedule options  I am not interested in a promotion because of a reason not listed in these options  I am interested in gaining a promotion but would like to discuss further with my supervisor | Required – must select one |
| End If log is C-Path, Pending Employee Review, and user is the employee of the log | | | |
| If follow up is required: | | | |
| Label | Employee Review Information: |  | Display if the log is “Pending Follow-up” |
| Text |  | Coaching\_Log | Display if the log is “Pending Follow-up.”  Display employee name and the date time when the employee reviewed the log |
| Label | Employee Comments/Feedback: |  | Display if the log is “Pending Follow-up.” |
| Text |  | Coaching\_Log | Display if the log is “Pending Follow-up.” |
| Label + Text | Follow-up required on [follow-up due date] | Coaching\_Log | Display if follow-up has not happened yet. |
| Label + Text | Follow-up occurred on [follow-up actual date] |  | Display if Follow-up has happened. |
| L:abel | Follow-up Notes: |  | Display if Follow-up has happened. |
| Text |  | Coaching\_Log | Display if Follow-up has happened.  Notes from Supervisor Follow-up |
| Label | Supervisor follow-up review information: |  | Display if Follow-up has happened.  Supervisor Name and Followup Timestamp |
| Text |  | Coaching\_Log | Display if Follow-up has happened. |
| Text | Your will be able to enter follow-up date/notes on the follow-up day or after. |  | Display if today is before follow-up due date and User is the Supervisor |
|  | | | |
| Label | Enter the date of follow-up coaching: |  | Display if Pending Follow-up and User is the Supervisor |
| Textbox + Calendar |  |  | Display if User is the Supervisor.  Disabled if today is before follow-up due date |
| Label | Provide the details from the follow-up coaching session including action plans developed: |  | If Pending Follow-up and User is the Supervisor |
| Textarea |  |  | Display if User is the Supervisor.  Disabled if today is before follow-up due date |
| End – if follow up is required | | | |
| Label | Enter the date of coaching: |  | If status is NOT Pending Follow-up |
| Input text |  |  | If status is NOT Pending Follow-up  Must be a valid past or current date. |
| Icon | Glyphicon-calendar |  |  |
| Label | Provide the details from the coaching session including action plans developed: |  | If status is NOT Pending Follow-up |
| 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://maximus365.sharepoint.com/sites/CCO/Resources/SOP/Contact%20Center%20Operations/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 | **OMR/BRL or OMR/BRN:**  Approved accommodation on file  Other  **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  **ASR:**  No longer employed or on LOA  System Issues  Skilling Issue  Multiple Complex Calls  Other – Provide Details  **Otherwise:**  Other | Reasons\_By\_ReportCode |  |
| Label | Is follow-up coaching required? |  | Indirect ASR log submitted with “Research Required” |
| Radio Buttons | Yes or No |  | Default to No |
| Label | Select the date of follow-up. |  | If follow-up coaching is required |
| Input | Follow-up due date |  |
| 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 text area:  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 |
| Label | Follow-up required on [follow-up due date] | Coaching\_Log | Display if follow-up is required. |
| 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 | Reviewed and acknowledged Quality Monitor on |  |  |
| Text |  | SupReviewedAutoDate |  |
| Label | Employee Review Information: |  |  |
| Text |  | EmployeeName |  |
| Label | Employee Comments/Feedback: |  |  |
| Text |  |  |  |
| 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 |  |
| Start – Follow up is required | | | |
| Label | Follow-up required on [follow-up actual date] |  | Display if Follow-up has not happened yet. |
| Label | Follow-up occurred on [follow-up actual date] |  | Display if Follow-up has happened. |
| L:abel | Follow-up Notes: |  | Display if Follow-up has happened. |
| Text |  |  | Display if Follow-up has happened.  Notes from Supervisor Follow-up |
| Label | Supervisor follow-up review information: |  | Display if Follow-up has happened.  Supervisor Name and Followup Timestamp |
| Text |  |  | Display if Follow-up has happened. |
| Label | Employee follow-up review information: |  | Display if log is completed.  Employee Name and Timestamp |
| Text |  |  | Display if log is completed. |
| Label | Employee follow-up feedback: |  | Display if log is completed. |
| Text |  |  | Notes from Employee after follow-up |
| End – Follow up is required | | | |
| 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 |  | Warning\_Log | Non-editable |
| Text |  | Warning\_Log\_StaticText |  |
| Lable | Check the box below to acknowledge the warning opportunity: |  | Display only when:   1. User is the employee of the log, AND 2. Pending Employee Review |
| checkbox |  |  |
| Label | I have read and understand all the information provided on this warning log. |  |
| Label | Provide any comments or feedback below: |  |
| Input textarea |  |  |
| Button | Submit |  |
| Label | Employee Review Information: |  | Display Employee Review information and Employee Comments/Feedback when:  User is the supervisor or manager of the employee and the warning log is completed.  Display “Close” button when:  User is the supervisor or manager of the employee |
| Text |  | Warning\_Log.CSRReviewDate |
| Label | Employee Comments/Feedback: |  |
| Text |  | Warning\_Log.CSRComments |
| 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
   10. sp\_SelectReviewFrom\_Coaching\_Log\_Quality\_Now
   11. sp\_ShortCalls\_Get\_BehaviorList
   12. sp\_ShortCalls\_Get\_Actions
   13. sp\_ShortCalls\_Get\_CallList
   14. sp\_ShortCalls\_Get\_SupReivewDetails
   15. sp\_ShortCalls\_SupReview\_Submit
   16. sp\_ShortCalls\_MgrReivew\_Submit
   17. sp\_ShortCalls\_getMgrReviewDetails
   18. sp\_Update\_Review\_Caoching\_Log\_Supervisor\_Pending\_Followup
   19. sp\_Update\_Review\_Caoching\_Log\_Employee\_Pending\_Followup

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, OR
* Over Turned Appeal (OTA) log, Pending Quality Lead Review

User is the employee

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

If Coaching Value is “Research Required” ” and the log is ACTIVE and not COMPLETED.

1. Indirect ASR log, Pending Supervisor Review, and user is the Supervisor or reassigned to. OR
2. User is the Manager, or Manager when this low CSAT log was submitted, or reassigned to

* Pending manager review, and one of the following condition is met:
  + Current Coaching Initiative
  + OMR Exception but NOT Short Calls
  + Low CSAT
  1. Pending CSE

If Coaching Reason is “Customer Service Escalation” and the log is ACTIVE and not COMPLETED.

* 1. Pending Short Call Review (Supervisor)

If coaching log is Short Call and status is “Pending Supervisor Review”.

* 1. Pending Short Call Confirm (Manager)

If Coaching Log is Short Call and status is “Pending Manager Review”.

* 1. Pending Follow-Up (Supervisor)

If coaching log requires follow-up and status is “Pending Follow-Up”.

* 1. Pending Regular Review

None of the above.

1. **Logic to determine who can view Log Details**

|  |  |
| --- | --- |
| My Submission | Submitter only |
| Historical Dashboard | Director.  Senior Manager.  Submitter.  Employee.  Supervisor.  Manager.  “ECL” user.  HR with job codes starting WHHR or WHER or WHRC.  Note: Display Warning logs for HR users only. |
| My Dashboard | Director.  Senior Manager.  Coaching Logs:  Non-ARC submitter.  Employee.  Supervisor.  Manager.  Reassigned user.  Log Manager (Low CSAT)  Warning Logs:  Submitter.  Employee.  Supervisor.  Manager |
| Survey | Employee of the log |

1. **Logic to determine Review Page display mode (Ready Only vs Editable)**

|  |  |
| --- | --- |
| Short Call - Pending Manager Review | If user is the manager or reassigned to, then Editable; Otherwise Read Only |
| Short Call – Pending Supervisor Review | If user is the supervisor or reassigned to, then Editable; Otherwise Read Only |
| Customer Service Escalation – Pending determination | If Pending Manager Review.  If user is the manager (or reassigned to), hen Editable.  Else Read Only |
| Research Required | If Pending Supervisor Review.  If user is the supervisor (or reassigned to), then Editable.  Else Read Only.  If Pending Manager Review.  If user is the manager (or reassigned to) or (the log is low CSAT and user was the manager when this log was entered), then Editable.  Else Read Only |
| Acknowledge – Pending Acknowlegement | Editable if:   1. User is the Employee of the log, OR 2. User is the Supervisor (or reassigned to) and the log is not Quality Bingo.   Otherwise Read Only |
| For all other logs | If Pending Supervisor Review.  If user is the supervisor (or reassigned to), then Editable.  Else Read Only.  If Pending Employee Review.  If user is the employee, then Editable.  Else Read Only.  For all other Pending Statuses, Read Only |

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

If the log is a warning log, next status will be “Completed”;

Otherwise:

For Over Turned Appeal (OTA) logs, next status will be “Completed”;

If no more reviews needed, next status will be “Completed”;

*(Note: logic for more reviews needed:*

* *BQNS (quality bingo), BQMS, or*
* *User is the supervisor and employee has acknowledged, or*
* *User is the employee and Pending Acknowledgement, or*
* *User is the employee and Pending Employee Review*
* *Supervisor has reviewed the log, and*
* *The log is IQS, or CTC, or High5Club, or Kudo, or Attendance, or MSR, or MSRS*

*)*

Otherwise:

* If user is the employee of the log,
* If follow-up is required,
* If follow-up has happened, then next status will be “Completed”;
* Otherwise, next status will be “Pending Follow-up”;
* If supervisor has acknowledged and NO follow-up required, then next status will be “Completed”;
* If supervisor has not acknowledged and NO follow-up required, then next status will be:
* “Pending Supervisor Review” for CSR, ISG, and TRAINING modules.
* “Completed” for SUPERVISOR module (bingo log);
* “Pending Manager Review” for SUPERVISOR module (non-bingo log);
* “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 Review”.
* Otherwise, next status will be “Completed”.
  1. Pending Research
* If Coaching is NOT required, then next status will be “Inactive”.
* Otherwise:
* If CSR or ISG 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 or ASR.
* 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, ISG, and TRAINING modules.
* “Pending Manager Review” for SUPERVISOR module.
* “Pending Quality Lead Review” for QUALITY module.
  1. Pending Short Call Review (Supervisor)

Next status will be “Pending Manager Review”.

* 1. Pending Short Call Confirm (Manager)

Next status will be “Completed”.

* 1. Pending Regular Review

Next status will be “Pending Employee Review”.

* 1. Pending Follow-Up

Next status will be “Pending Employee Review.”

* 1. Pending Employee Review

Next status will be “Completed.”

1. **When to display instruction/static text (***Refer to FS document for what text to display)*
   1. Pending CSE – user is the manager or reassigned to, Pending Manager Review (Note: when a log is added as CSE, it goes to Pending Manager Review)
   2. Pending Research

User is the manager or reassigned to, Pending Manager Review, log is Current Coaching Initiative.

User is the supervisor or reassigned to, Pending Supervisor Review, Indirect ASR submitted with Research Required.

* 1. Pending Review
* Survey – user is the supervisor or reassigned to, Pending Supervisor Review
* OMR Short Call – user is the supervisor or reassigned to, Pending Supervisor Review, log is short call.
* Low CSAT – user is the manager or reassigned to, Pending Manager Review, log is low CSAT.
* Training Short Duration – user is the supervisor or reassigned to, Pending Supervisor Review, log is “Training Short Duration”.
* Training Overdue – user is the supervisor or reassigned to, Pending Supervisor Review, log is “Training Overdue”.
* Quality High 5 Club – log is “High 5 Club.”
* Quality KUDO CSR/ISG – user is the CSR/ISG, log is “Kudo.”
* Quality KUDO Supervisor – user is the supervisor, log is “Kudo.”
* OMR Break Time Exceeded – user is the Supervisor, Pending Supervisor Review, log is “BRL” or “BRN.”
* ETS/HNC, ETS/ICC – Pending Supervisor Review, log is “ETS/HNC” or “ETSICC”.
* ETS/OAE – user is the supervisor or reassigned to, Pending Supervisor Review, log is “ETS/OAE”
* ETS/OAS– user is the supervisor or reassigned to, Pending Supervisor Review, log is “ETS/OAS.”
* OMR/PBH – user is the CSR or ISG or Supervisor, log is “PBH.”
* OTH/APS – user the supervisor, Pending Acknowledgement or Pending Supervisor Review, log is OTH/APS
* OTH/APW user the supervisor, Pending Acknowledgement or Pending Supervisor Review, log is OTH/APW
* FC/ATTH (warning log)
* FC/ATTT (warning log)
* OMR/IDD
* OMR/AUD user is the current reviewer (supervisor), Pending Supervisor Review
* OMR/NGD user is the current reviewer (supervisor), Pending Supervisor Review