

**Title: eCoaching Log**

**Technical Requirements**

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| Last Revision | Last Review | Description |
| 07/30/2015 |  | TFS175 – eCL Display Assigned Reviewer |

Prepared by: Brian Coughlin Date: 01/23/2014

Department, Location: R&T – Oakdale

Approved by: Date:

| **Date** | **Change History Log**  **Change Description** | **Author** |
| --- | --- | --- |
| 01/23/2014 | Initial Draft | Brian Coughlin |
| 2/28/2014 | Removed GetDate(+7) in inactivations SCR 12330 Section VI | Brian Coughlin |
| 3/12/2014 | Updated Active and End\_Date for rehired employees per SCR 12265 Section II | Brian Coughlin |
| 3/26/2014 | Added suggestions from Dev review and WTTI\* Job Code from SCR12467 Section IV | Brian Coughlin |
| 4/11/2014 | Added Emp\_Program and Start Date to the hierarchy table SCR 12407 | Brian Coughlin |
| 4/24/2014 | Updated the Requirements for SCRs 12483 (II #53, #58, VI, VII #13,#21)& 12495 (III E.) update eCL record to reflect appended score and note field & move the eCoaching Log application from SharePoint to the desktop | Brian  Coughlin |
| 05/27/2014 | P11841 – eCL Database Redesign  Added Program to the Outlier data feed | Doug Stearns |
| 06/03/2014 | P12483 – Update eCL record to reflect appended score and note field  Changes based on feedback  II #55 – added missing values  II #58 – removed previous note for Quality Coaching Reason | Doug Stearns |
| 06/20/2014 | P12897 – eCL Coaching Source changes  II # 57 and IV Layouts – Changed CMS Customer Call Listening to CMS Reported Item  II # 57 and IV Layouts – Added Internal CCO Reporting | Doug Stearns |
| 06/26/2014 | P12930 – Display Verint scorecard name  Added new section IV.VII Review Page Informational Display page 42  And corrections from review | Doug Stearns |
| 07/10/2014 | P13054 – IQS/eCL Add Evaluation Form name to data feed  Added new field 23 | Doug Stearns |
| 07/14/2014 | P13098 – eCL Source drop down menu  II # 57 and IV Layouts – Updated source values based on SCR | Doug Stearns |
| 07/15/2014 | P13054 – IQS/eCL Add Evaluation Form name to data feed  VII – Modified field 23 for eMail and Written Corr | Doug Stearns |
| 07/16/2014 | P13129 – eCL Add ETS to attendance  II Customer Requirements – Modified #58 – added policy; Modified #27 Attendance – added ETS for opportunity/reinforcement;  IV Layouts – Modified Direct non-CSE – added ETS for Attendance | Doug Stearns |
| 07/23/2014 | P13213 – eCL Change coaching reason ID for OMR feed  Updated Outlier Reporting Matrix Coaching Reason column from Current Coaching Initiative to OMR / Exceptions rows 1 through 19 | Doug Stearns |
| 07/24/2014 | P13138 – eCL restrict notifications of failed scorecards  Updated the following  V System Generated Emails  VII IQS (Data Feed\Form Entry  Included note that failed scorecards that match an existing record won’t send email notifications | Doug Stearns |
| 07/28/2014 | P13218 – Display web server time zone  Updated the following  I CSR Dashboard  II Supervisor Dashboard  III Manager Dashboard  IV Quality\Training Supervisor Dashboard  V Support Staff Dashboard  VI Historical Reporting Dashboard | Doug Stearns |
| 08/04/2014 | P13265 – Group coaching reasons on Historical Dashboard  VI Historical Reporting Dashboard – Display Fields column to show sum of opportunities and reinforcements | Doug Stearns |
| 08/07/2014 | P13263 – eCL FFM ARC job codes to submit  IV Layouts, Dashboard Permissions Criteria - Added new Submission Page section for those with permissions to submit eCoaching Logs and Modified Main Dashboard Review section to include WACS01 | Doug Stearns |
| 08/08/2014 | P13263 – eCL FFM ARC job codes to submit  IV Layouts, Dashboard Permissions Criteria Modified Main Dashboard Review section to move WACS01 to My Submitted Support Staff pre feedback from review. | Doug Stearns |
| 08/11/2014 | eCL Phase 2 – Supervisor and Quality  X eCoaching Modules– added new section  Changed references of Pending CSR Review to Pending Employee Review  Changed references of Other: Specify reason under Question 4 below to Other: Specify reason under coaching details. | Doug Stearns |
| 09/04/2014 | P13386 – eCL FFM ARC Submit  IV Layouts, Dashboard Permissions Criteria – modified section for those with permissions to submit eCoaching Logs to allow only WACS02 with ARC in ACL | Doug Stearns |
| 09/11/2014 | Updates to the order of display of call source | Doug Stearns |
| 09/15/2014 | P13506 – eCL CSR ARC Submit  IV Layouts, Dashboard Permissions Criteria Modified Submission Page and My Submitted to allow CSR WACS01, WACS02, WACS03 who are ARC to submit eCLs. | Doug Stearns |
| 09/16/2014 | P13512 – eCL Display label of Employee instead of CSR on review pages  Updated references of CSR to Employee as appropriate (note: most of the changes should have been made as part of phase 2, but weren’t)  I Product Description,  II Customer Requirements-Data Definition,  II Customer Requirements-User Interface Controls,  III Program Requirements, IV Layouts-Dashboard Permissions Criteria,  IV.I Employee Dashboard,  IV.II Supervisor Dashboard,  IV.III Manager Dashboard,  IV.IV Quality\Training Supervisor Dashboard,  IV.V Support Staff Dashboard,  IV.VI Historical Reporting Dashboard,  VII Review Page Informational Display,  VI Outliers (Data Feed\Form Entry),  VI Outliers (Data Feed\Form Entry)-Front End Form,  VII IQS (Data Feed\Form Entry) | Doug Stearns |
| 09/23/2014 | P13515 – eCL eMail Mappings  II Customer Requirements - Data Definitions  76 EmailSent - added Employee and removed Only for SubCoachingSource = Supervisor Coaching/Manager Coaching  II Customer Requirements - User Interface Controls  44 Submit - added Direct and not Quality Specialist Coaching for non-CSE, added paragraph for Indirect non Customer Service Escalations, For Customer Service Escalations added an email is sent  59 Submit - changed Employee to be the next lower level, removed If status is Pending...email is automatically sent  V System Generated Emails  I Pending Supervisor Review - changed condition for Pending Supervisor Review  II Pending Manager Review - changed condition for Pending Manager Review  III Pending Employee Review - changed condition for Pending Employee Review  IV No Email - changed for no email sent  VI Outliers (Data Feed\Form Entry) - added heading and note for Pending Acknowledgement  VII IQS (Data Feed) - added email notifications section | Doug Stearns |
| 09/26/2014 | P13479 – eCL Warning Coaching Logs for CSRs  I Product Description (first paragraph)  II Customer Requirements (Data Definition #57 SubCoachingSource, #58 CoachingReason, #59 SubCoachingReason, User Interface Controls multiple changes which renumbered items)  III Program Requirements (D - second paragraph, F - labeled existing paragraph)  IV Layouts (Direct Coaching – Progressive Disciplinary Warning, Indirect Coaching – Progressive Disciplinary Warning, Dashboard Permissions Criteria - Main Dashboard Review, II Supervisor Dashboard, III Manager Dashboard, VI Historical Reporting Dashboard, VII Review Page Informational Display) | Doug Stearns |
| 09/29/2014 | P13479 – eCL Warning Coaching Logs for CSRs – additional requirements  I Product Description (first paragraph)  II Customer Requirements (Data Definition #57 SubCoachingSource #58 CoachingReason, #59 SubCoachingReason, User Interface Controls #22, #39, #40, #41)  III Program Requirements (item D - second paragraph)  IV Layouts (Direct Coaching – Progressive Disciplinary Warning only) | Doug Stearns |
| 10/07/2014 | P13479 – eCL Warning Coaching Logs for CSRs – even more additional requirements  I Product Description (first paragraph)  II Customer Requirements (Data Definition #57 SubCoachingSource, #59 SubCoachingReason, User Interface Controls #22, #39, #40, #41, #42, #43, #44)  IV Layouts (Direct Coaching – Progressive Disciplinary Warning)  V System Generated Emails - IV No Email | Doug Stearns |
| 10/09/2014 | P13479 – eCL Warning Coaching Logs for CSRs – still more additional requirements  II Customer Requirements (Data Definition #s1,2,3,4,7,8,9,10,20,30,32,53,54,55,56,57,81,82,83,84)  IV Layouts Direct Coaching – Progressive Disciplinary Warning, II Supervisor Dashboard #5, III Manager Dashboard #5, VII Review Page Information Display | Doug Stearns |
| 10/17/2014 | P13622 – eCL OMR SOP Link in review page  Added link to following requirement  VI. Outliers (Data Feed\Form Entry) eCL Outlier Research and Coaching Process Front-end Form Changes #1 Manager Review (page 56/57) | Doug Stearns |
| 10/20/2014 | P13622 – eCL OMR SOP Link in review page  It was pointed out the link already existed and just needed to be updates. | Doug Stearns |
| 10/20/2014 | P13653 – eCL LSA Module  Added or modified the following requirements:  II Customer Requirements (Data Definition #80)  IV Layouts Dashboard Permissions Criteria Main Dashboard  2.4x Local System Administrator (LSA) | Doug Stearns |
| 10/21/2014 | P13479 – eCL Warning Coaching Logs for CSRs – even still more additional requirements  II Customer Requirements (Data Definition #54,55,60 and User Interface Controls #39, 40, 41, 42, 43, 44, 46)  IV Layouts Direct Coaching – Progressive Disciplinary Warning, II Supervisor Dashboard #5, III Manager Dashboard #5, VII Review Page Information Display | Doug Stearns |
| 10/23/2014 | P13479 – eCL Warning Coaching Logs for CSRs – updates from review  II Customer Requirements (Data Definition #1,58,81);  IV Layouts Direct Coaching – Progressive Disciplinary Warning; II Supervisor Dashboard #5, III Manager Dashboard #5, VII Review Page Information Display; V System Generate Emails IV No Email | Doug Stearns |
| 10/24/2014 | P13609 – eCl for Quality Alignment Specialists  Updated 2.3.1.1 to add WACQ03  Updated 2.3.1.13 to move WACQ03 from lead to specialist | Doug Stearns |
| 10/24/2014 | P13624 – eCL Warnings 13 week inactivation  IV Layouts - Dashboard Permissions Criteria  4.3.1 Inactivate Coaching Logs  4.3.2 Inactivate Warning Logs | Doug Stearns |
| 10/27/2014 | P13479 – eCL Warning Coaching Logs for CSRs – updated sub-reason for Other  II Customer Requirements (Data Definition #60 and User Interface Controls #39, 40, 41)  IV Layouts Direct Coaching – Progressive Disciplinary Warning | Doug Stearns |
| 10/28/2014 | P13659 – eCL ETS Feed  Added the following requirements  2.1.5x Electronic Timecard System Data Feed (ETS)  2.2.5x Electronic Timecard System Data Feed (ETS) | Doug Stearns |
| 10/29/2014 | P13701 – IQS/eCL IQA Scorecards  Modified the following requirements  V System Generated Emails second paragraph (changed to match records on Evaluation ID)  VII IQS (Data Feed) second paragraph (changed to match records on on Evaluation ID) | Doug Stearns |
| 10/30/2014 | P13659 – eCL ETS Feed  Update the following requirements for ETS reports and review text  II Customer Requirements (User Interface Controls updated #28, inserted #32 – renumbered following items)  IV Layouts Direct Coaching – Non CSE, Indirect Coaching – Non CSE  2.1.5.1.4, 2.1.5.2.4, 2.1.5.4x, 2.2.1.6.1, 2.2.1.6.2, 2.2.5.1.4, 2.2.5.2.4, 2.2.5.4x | Doug Stearns |
| 11/03/2014 | P13631 – eCL Coaching Notes Overwritten  IV Layouts – VII Review Page Informational Display – added paragraph to save information entered on review page. | Doug Stearns |
| 11/04/2014 | P13753 – eCL Access for Exec Mgmt  Dashboard Permissions Criteria – Submission Page, Main Dashboard, My Submitted, Historical Dashboard and Historical Dashboard Review - Manager Level users - added WPWL\*  2.2.1.13 Access to submission - Sr Manager - added WPWL51 | Doug Stearns |
| 11/04/2014 | P13479 – eCL Warning Coaching Logs for CSRs – updated sub-reasons  II Customer Requirements (Data Definition #60 and User Interface Controls #40, 41, 42)  IV Layouts Direct Coaching – Progressive Disciplinary Warning | Doug Stearns |
| 11/13/2014 | P13659 – eCL ETS Feed  Revisions based on decision on not doing UI changes with data feed  Added ETS back in as sub-reason for Attendance in CSR module UI, removed ETS as reason with sub-reasons, removed ETS as source, aligned reports, report codes, and review text by module/report, removed reference to place holder for Utilization report, removed Other as sub-reason.  II Customer Requirements User Interface Controls #28 (added ETS as Attendance sub-reason), ETS (removed)  IV Layouts Direct Coaching - CSE How was the coaching opportunity identified? (removed ETS source), Direct Coaching – Non CSE (removed ETS reason/sub-reasons), Indirect Coaching – Non CSE (removed ETS reason/sub-reasons)  X 2.1.5.1, 2.1.5.1.4, 2.1.5.2.4, 2.1.5.4x (CSR related reports, codes, text etc), 2.2.1.6.1, 2.2.1.6.2 (removed ETS reason/sub-reasons), 2.2.1.9 (removed ETS source), 2.2.5.1, 2.2.5.1.4, 2.2.5.2.4, 2.2.5.4x (Supervisor related reports, codes, text etc) | Doug Stearns |
| 11/14/2014 | P13659 – eCL ETS Feed  Added ETS back as reason for Supervisor  2.2.1.6.1 and 2.2.1.6.2  Changed Coaching Details to Report Details  2.1.5.2.5 and 2.2.5.2.5  Changed Review Text to Description Text  2.1.5.4x and 2.2.5.4x | Doug Stearns |
| 11/17/2014 | P13826 – IQS/eCL Source Values  II Customer Requirements – Data Definition #58 Source  VII IQS (Data Feed) – third paragraph  File Layout Field #19 – added source values  Sample IQS Feed – added source value sample | Doug Stearns |
| 11/19/2014 | P13659 – eCL ETS Data Feed  Updated the following based on review  2.1.5.2.4, 2.1.5.2.5, 2.2.5.2.4, 2.2.5.2.4 | Doug Stearns |
| 11/20/2014 | P13822 – eCL Disable ARC My Submitted Review  Added My Submitted Review section to IV Layouts, Dashboard Permissions Criteria to show that ARC CSRs shouldn’t have access to review page. | Doug Stearns |
| 11/20/2014 | P13618 – eCL Dashboard check current lanid  I Product Description – added second to last paragraph regarding re-used LAN IDs and eCoaching Logs | Doug Stearns |
| 11/21/2014 | P13794 – eCL Dashboard for Acting Managers IV Layouts II Supervisor Dashboard and III Manager Dashboard – added note for managers acting as supervisors and supervisors acting as managers | Doug Stearns |
| 11/24/2014 | P13542 – eCL Supervisor Warnings  I Product Description, Project Purpose  2.2.1.4.1 Date of Coaching  2.2.1.4.2 Date of Event  2.2.1.4.3 Date Warning Given  2.2.1.6.3 Direct Warning Reason and Sub-Reasons  2.2.1.7 Coaching Details  2.2.1.8 Coaching Session Details  2.2.1.9 Identify Source for eCoaching Log  2.2.1.10 Associated with a Call Record  2.2.1.11 Verification  2.2.1.12 Required entry fields  2.2.1.14 Progressive Disciplinary Warnings  2.2.2.6 Progressive Disciplinary Warnings | Doug Stearns |
| 12/10/2014 | P13891 – eCL Original Hierarchy  Modified the following:  II Customer Requirements - Data Definition (#82 SupID, #83 MgrID)  III Program Requirements - Item G  Added the following:  II Customer Requirements - Data Definition (#84 SupID, #85 MgrID)  III Program Requirements - Item H  3.2 Review Page Display | Doug Stearns |
| 12/18/2014 | P14028 – eCL OMR FFM T2 Transfers  VI Outliers (Data Feed\Form Entry)  eCL Outlier Reporting Matrix #20 - added entry for OMR: FFM T2 Transfers  File Layout - added OMR: FFM T2 Transfers to description of field #4 | Doug Stearns |
| 12/19/2014 | P14028 – eCL OMR FFM T2 Transfers  II Customer Requirements - Data Definition #60, User Interface Controls #34  IV Layouts - Direct Coaching – Non CSE, Indirect Coaching – Non CSE | Doug Stearns |
| 12/29/2014 | P14031 – eCL ETS Non-compliance Action Report  Corrected numerous mis-spellings and double spaces  Updated or added the following requirements:  2.1.5.1 ETS Reports  2.1.5.1.3 Naming Convention  2.1.5.1.4 Report Codes  2.1.5.2.3 Date of Coaching  2.1.5.2.4 Coaching Reasons  2.1.5.2.5 Report Details  2.1.5.3 Notification of eCoaching Logs  2.1.5.3.1 Notification for Outstanding Action  2.1.5.3.1.1 Pending Supervisor Review  2.1.5.4.6 Outstanding Action (Employee) Description Text  2.1.5.5 Supervisor Review  2.1.5.5.1 Link to SOP  2.1.5.5.2 Yes Requires Coaching  2.1.5.5.3 No Does Not Require Coaching  2.2.5.1 ETS Reports  2.1.5.1.3 Naming Convention  2.2.5.1.4 Report Codes  2.2.5.2 eCoaching Logs  2.2.5.2.3 Date of Coaching  2.2.5.2.4 Coaching Reasons  2.2.5.2.5 Report Details  2.2.5.3.1 Notification for Outstanding Action  2.2.5.3.1.1 Pending Manager Review  2.2.5.4.7 Outstanding Action (Employee) Description Text  2.2.5.4.8 Outstanding Action (Supervisor) Description Text  2.2.5.5 Manager Review  2.2.5.5.1 Manager Review OAE  2.2.5.5.2 Manager Review OAS  2.2.5.5.3 Link to SOP  2.2.5.5.4 Yes Requires Coaching  2.2.5.5.4.1 Requires Coaching Fields  2.2.5.5.5 No Does Not Require Coaching  2.2.5.5.5.1 Does Not Require Coaching Fields | Doug Stearns |
| 01/12/2015 | P14043 – eCL SOP Link  eCL Outlier Research and Coaching Process Front-end Form Changes - Conditions for Review pages - #1  added ‘latest’ to text and updated URL | Doug Stearns |
| 01/14/2015 | P14031 – eCL ETS Non-compliance Action Report  Modified the following requirements for order of ETS OAE/OAS review page fields:  2.1.5.5.2x, 2.1.5.5.3x, 2.2.5.5.4x, 2.2.5.5.5x | Doug Stearns |
| 01/20/2015 | P14139 – eCL LSA Submission job codes  Updated the following:  2.4.1.13 Access to Submission | Doug Stearns |
| 01/23/2014 | P14072 – eCL EA Inactivations  Moved 4.2 to 4.1.1  Moved 4.3x to 4.2x  Added 4.2.1x, 4.2.2x, 4.2.3x  Modified 4.3.1x and 4.3.2x | Doug Stearns |
| 01/28/2015 | P14072 – eCL EA Inactivations  Updates from review – modified the following requirements  4.1.1 Employee Hierarchy  4.3.1.1 Employee Status  4.3.1.2 Missing Record  4.3.2.1 Employee Status  4.3.2.2 Expired | Doug Stearns |
| 01/29/2015 | P14065 – eCL HR Access to Historical Dashboard  III Program Requirements - D  IV Layouts - Dashboard Permissions Criteria - Historical Dashboard and Historical Dashboard Review  IV Layouts - VI Historical Reporting Dashboard | Doug Stearns |
| 02/03/2015 | P14065 – eCL HR Access to Historical Dashboard  Revised III Program Requirements – D  Added III Program Requirements – I | Doug Stearns |
| 02/05/2014 | P14252 – eCL LSA Job Codes to submit  Modified 2.4.1.13 Access to Submission to add WISA12 – Administrator, Systems | Doug Stearns |
| 02/12/2015 | P13272 – eCL Change BCC to CCO  Removed references of BCC or changed to CCO and changed Vangent to GDIT  I. Product Description  Project Purpose - first sentence  II. Customer Requirements  Data Definition - 59 CoachingReason  User Interface Controls – 2 eCL Monthly Compliance Report, 3 eCL Monthly Coaching Reason Trend Analysis, 4 eCL Quarterly Coaching Reason Trend Analysis  VI. Outliers (Data Feed\Form Entry)  eCL Outlier Research and Coaching Assumptions – first sentence  eCL Outlier Research and Coaching Process – first note | Doug Stearns |
| 02/13/2015 | P13272 – eCL Change BCC to CCO  II. Customer Requirements  Data Definition - 58 SubCoachingSource – these two references to remain BCC for historical purposes. | Doug Stearns |
| 02/13/2015 | P14065 – eCL HR Access to Historical Dashboard  IV Layouts  Dashboard Permissions Criteria – Submission Page, Main Dashboard, My Submitted  VI Historical Reporting Dashboard – Filter Field Selections  2.2.1.13 Access to submission – corrected typo and added engineering  2.3.1.13 Access to Submission – corrected typo and added engineering  2.4.1.13 Access to Submission – added engineering | Doug Stearns |
| 02/17/2015 | P14323 – eCL No self coaching logs  Added the following requirement  III Program Requirements – J  2.1.1.1 No log to self  2.2.1.15 No log to self  2.3.1.14 No log to self  2.4.1.14 No log to self | Doug Stearns |
| 02/18/2015 | P14304 – eCL Warning Reasons on Dashboard  Modified or added the following requirements  IV Layouts  - II Supervisor Dashboard - 6 My Teams Warning eCoaching Logs  - III Manager Dashboard - 5 My Teams Warning eCoaching Logs  2.1.1.2 Direct Warning Reason and Sub-Reasons  2.1.1.3 No Duplicate Warnings  2.2.1.6.3 Direct Warning Reason and Sub-Reasons  2.2.1.16 No Duplicate Warnings | Doug Stearns |
| 02/19/2015 | P14323 – eCL No self coaching logs  Modified the following requirement  2.1.1.1 No log to self  2.2.1.15 No log to self  2.3.1.14 No log to self  2.4.1.14 No log to self | Doug Stearns |
| 03/03/2015 | P14423 – eCL Extend Dashboard Hierarchy  III Program Requirements  - D - added warning information about senior managers, directors, and regional managers  - K - added new log information about senior managers, directors, and regional managers  IV Layouts – added Dashboard Filters table to the following sub-sections:  I Employee Dashboard  II Supervisor Dashboard  III Manager Dashboard  IV Quality\Training Supervisor Dashboard  V Support Staff Dashboard  VI Historical Reporting Dashboard | Doug Stearns |
| 03/09/2015 | P14422 – eCL Dashboard Enhancements  Modified or added the following sections (added display and filter for opportunity/reinforcement to all dashboards, sorting by column heading, added filter values section)  I Employee Dashboard  II Supervisor Dashboard  III Manager Dashboard  IV Quality\Training Supervisor Dashboard  V Support Staff Dashboard  VI Historical Reporting Dashboard  Dashboard Filter Values | Doug Stearns |
| 03/16/2015 | P14512 – eCL Training Module  II Customer Requirements  Data Definition – 80 ModuleID, 86 Behavior  User Interface Controls – 16 Select Coaching Module; 66 Select Program; 67 Where Behavior  2.3.5 Electronic Timecard System Data Feed (ETS) (added for consistency)  2.4.5 Electronic Timecard System Data Feed (ETS) (added for consistency)  2.5x Trainers and sub-requirements | Doug Stearns |
| 03/23/2015 | P14422 – eCL Dashboard Enhancements  IV Layouts  Revised Dashboard Filter Values table; ensured the dashboard name is included with each section for each dashboard, added additional values and reordered as needed  P14478 – eCL SQL to Delete Records  5.0 Administrative Functions  5.1 Delete Records  5.2 Inactivate Records  P14423 – eCL Extend Dashboard Hierarchy  III Program Requirements – K – redefined how senior managers are defined | Doug Stearns |
| 03/25/2015 | P14422 – eCL Dashboard Enhancements  IV Layouts – added Coaching Reason to dashboards | Doug Stearns |
| 03/26/2015 | P14634 – eCL Inactivate logs process  Added or updated the following requirements  5.1, 5.1.1, 5.1.2, 5.1.2.1, 5.1.2.2, 5.1.2.3, 5.1.2.4, 5.1.2.4.1, 5.1.2.4.2 | Doug Stearns |
| 03/30/2015 | P13618 – eCL Dashboard check current lanid  Correction based on feedback | Doug Stearns |
| 03/30/2015 | P14422 – eCL Dashboard Enhancements  Updates based on feedback | Doug Stearns |
| 03/30/2015 | P14423 – eCL Extend Dashboard Hierarchy  Updates based on feedback | Doug Stearns |
| 03/31/2015 | P14478 – eCL Delete Logs  Added or updated 5.1x | Doug Stearns |
| 03/31/2015 | P14634 – eCL Inactivate Logs  Added or updated 5.2x | Doug Stearns |
| 04/01/2015 | P14422 – eCL Dashboard Enhancements  IV Layouts – Historical Dashboard updates for Coaching Reason, Sub-coaching Reason and Value | Doug Stearns |
| 04/02/2014 | P14703 – eCL AHT Sub-coaching Reasons in CSR module  Customer Requirements – User Interface Controls - #26 AHT  IV Layouts – Direct Coaching Non CSE, Indirect Coaching Non CSE | Doug Stearns |
| 04/03/2015 | P14512 – eCL Training Module  Updated the following 2.5.1.6.1 Direct Coaching Reason and Sub-Reasons  2.5.1.6.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 04/07/2015 | P14676 – eCL Extract to Excel from Historical Dashboard  Added the following requirements:  6.0 Reporting  6.1.1 Filters  6.1.2 Data | Doug Stearns |
| 04/28/2015 | P14634 – eCL Log Inactivation Feed  Changes from review  5.2.2.3 Schedule  5.2.2.4.2 Notification | Doug Stearns |
| 04/30/2015 | P14840 – eCL Performance Improvements  IV Layouts  Dashboard Filter Values – added notes for initial defaults  Corrected Submitted description for all Dashboard Filters (added word ‘end’)  III Manager Dashboard, Manager Dashboard Filters, My Dashboard – My Hierarchy eCoaching Logs section – added filter F for Submitted | Doug Stearns |
| 04/30/2015 | P14818 – eCL Low CSAT Feed  Added exception to note on manager providing research/coaching  eCL Outlier Reporting Matrix 12 to Manager Review and Data Feed  Front-end Form – Conditions for Review pages – 1 Manager review – added row for report code LCS  Moved layout of file to CCO\_eCoaching\_Log\_OMR\_Layout.docx | Doug Stearns |
| 05/18/2015 | P14916 – eCL New HR Job Codes  IV Layouts – Dashboard Permissions Criteria Submission Page, Main Dashboard, My Submitted, Historical Dashboard, Historical Dashboard Review | Doug Stearns |
| 05/27/2015 | P15029 – eCL AHT for Supervisor Module  Modified the following requirements to add additional AHT sub-reasons to supervisor module:  2.2.1.6.1 Direct Coaching Reason and Sub-Reasons  2.2.1.6.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 06/08/2015 | P15008 – New job codes for Supervisor module  Added two new job codes to  2.2.1.13 Access to submission | Doug Stearns |
| 06/10/2015 | P15075 – eCL Training Module Updates  Modified the following requirements to have Opportunity or Reinforcement as values for all sub-coaching reasons except Recognition and Customer Service Escalation (which remain unchanged)  2.5.1.6.1 Direct Coaching Reason and Sub-Reasons  2.5.1.6.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 07/13/2015 | TFS261 – eCL ETS OAS New Text  Modified the text in the following requirement  2.2.5.4.8 Outstanding Action (Supervisor) Description Text | Doug Stearns |
| 07/24/2015 | TFS363 – eCL Duplicate form names  Updated the following:  II Customer Requirements – Data Definition #3 FormName – added note that resulting form name should be duplicate | Doug Stearns |
| 07/27/2015 | TFS364 – eCL not displaying coaching notes  Added requirements 3.2x for review pages | Doug Stearns |
| 07/28/2015 | TFS363 – eCL Duplicate form names  Updated the following based on feedback:  II Customer Requirements – Data Definition #3 FormName – added note that resulting form name shall be unique | Doug Stearns |
| 07/30/2015 | TFS175 – eCL Assigned Reviewer  Updated the following requirements:  VII Review Page Informational Display - number 13, Condition/value, Description/source page 68  3.2.1.1.1 Coaching and Warning Logs page 159 | Doug Stearns |

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# Product Description

Project: eCoaching Log

Project Purpose: The eCoaching Log (eCL) is an internal GDIT process designed for the entry and storage of the coaching notes that supervisors, managers, Advanced Resolution Center (ARC) CSRs and quality leads make regarding Employee performance. They may also be related to Verbal and Written progressive disciplinary warnings the employee or supervisor receives from their supervisor or manager. These notes are gathered through escalations, floor walking, training, quality monitors. It also provides a repository of coaching notes to generate reports for management. The coaching notes will be retained for 3 years.

The eCoaching Log contains a component for Employees to have the ability to comment on, or simply acknowledge the coaching comments entered by the supervisor or manager. The eCoaching Log VIP site establishes consistency and ease of use in our coaching notes process along with providing historical coaching data for all Employees.

The central effort here involves porting the existing InfoPath based eCoaching log to an .NET/SQL Server platform. This will allow for improved performance and increased data capacity. The interface will utilize heirarchy information defined in Peoplesoft and eWFM.

The text (comments) fields in the database will need to be periodically scanned for PHI/PII data, in accordance with CCO Security Policy and Procedures.

The Employee/Supervisor hierarchical relationship comes from WFM, the HR/Peoplesoft group maintains Supervisor/Manager relationship. If Hierarchy information is missing in Coaching Logs received within the last 30 days, it will be updated with information from the WFM Employee Information table.

Many Employee names contain apostrophes which need to be removed in the database tables as well as the IQS feeds. They need to be retained in email addresses so those will be converted to double apostrophes. This has been completed for database functionality and security.

The comma delimiter in the IQS feed was replaced with a pipe delimiter (|) in order to maintain the punctuation integrity in the data.

From the dashboards, clicking on an eCoaching Log should open the log in a child window. With this functionality, the filter choices in the parent dashboard window are retained after the log window is closed.

Authentication to the eCL tab is done by validating the users LAN ID against a hierarchy table which is populated by Peoplesoft and eWFM based data. The LAN ID comes from the Peoplesoft feed. This replaces the previous Active Directory check, because there are now two disparate Actived Directory systems. Due to weekly AD migration of users the production database is updated to convert vngt\ LAN IDs to the new ad\ LAN IDs, so that these migrated users can access the eCoaching system.

LAD IDs are occasionally re-used (a LAN ID of a former or terminated employee is assigned to a new employee). eCoaching Logs of the previous user of the LAN ID should not be combined or displayed with the logs of the new user.

ECLs are not maintained for subcontractors and records that are not able to be mapped to a user are rejected.

Document Purpose: To provide technical specifications the eCoaching Log.

Project Team: See table below.

| **Name** | **Role** |
| --- | --- |
| John Tiongson | Program Manager/Analyst |
| Tim Queen | Project Manager – Engineering |
| Jourdain Augustin | Engineering |
| Susmitha Palacherla | Engineering |
| Doug Stearns | Requirements and Testing |

# Customer Requirements

Database Schema



Data Definition

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **#** | **REQUIREMENT** | **Type** | **RELATED REQUIREMENTS** | **COMMENTS** | |  |
|  | CoachingID | Whole Number (integer) |  | On submit.  Coaching Log Primary Key  FK to Coaching\_Log\_Reason | |  |
|  | WarningID | Whole Number |  | On submit,  Warning Log Primary Key  FK to Warning\_Log\_Reason | |  |
|  | FormName | Text (string) |  | On submit, concatenates form name and ID eCL-[strCSR]-[numID].  Note: the resulting concatenated form name shall be unique  Coaching\_Log and Warning\_Log | |  |
|  | StatusID | Whole Number (integer) | Unknown | Overall status of form. (AUTO)  Coaching\_Log and Warning\_Log (note: Warning will go to complete upon submission) | |  |
| Completed |  |
| Inactive |  |
| Pending Acknowledgement |  |
| Pending Employee Review |  |
| Pending Manager Review |  |
| Pending Supervisor Review |  |
| Pending Sr. Manager Review |  |
| Pending Quality Lead Review |  |
| Pending Deputy Program Manager Review |  |
|  | EventDate | Date (date) |  | Indirect form: Date of event  Warning form: Date Warning issued  Coaching\_Log and Warning\_Log | |  |
|  | CoachingDate | Date (date) |  | Direct form: Date of coaching  Coaching\_Log | |  |
|  | SubmitterID | Text (string) |  | Submitter LAN ID  Coaching\_Log and Warning\_Log | |  |
|  | EmpID | Whole Number (integer) |  | Employee ID  Coaching\_Log and Warning\_Log  FK to Employee\_Hierarchy  FK to CSR\_Hierarchy | |  |
|  | SiteID | Whole Number (integer) |  | Employee Site  The site where the scorecard is created. Valid site IDs are:  SiteID City  1 Bogalusa  2 Boise  3 Brownsville  4 Chester  5 Coralville  6 Corbin  7 Hattiesburg  8 Houston  9 London  10 Lawrence  11 Layton  12 Lynn Haven  13 Pearl  14 Phoenix  15 Riverview  16 Sandy  17 Waco  18 Winchester  20 Arlington  Coaching\_Log and Warning\_Log  FK to Dim\_Site  Note: not all sites are active. Only allow active sites to be selected. | |  |
|  | isUCID | True/False (boolean) | True/False | Universal Call ID decision field.  Coaching\_Log | |  |
|  | UCID | Text (string) |  | Universal Call ID  Coaching\_Log | |  |
|  | isVerintID | True/False (boolean) | True/False | VERINT Monitor decision field.  Coaching\_Log | |  |
|  | VerintID | Text (string) |  | VERINT Contact/Journal Number  Coaching\_Log | |  |
|  | isAvokeID | True/False (boolean) | True/False | Avoke decision field.  Asscociated with Behavioral Analytics Monitor  Coaching\_Log | |  |
|  | AvokeID | Text (string) |  | Associated with Behavioral Analytics ID  Coaching\_Log | |  |
|  | isNGDActivityID | True/False (boolean) | True/False | NGD Activity ID decision field.  Coaching\_Log | |  |
|  | NGDActivityID | Text (string) |  | NGD Activity ID  Coaching\_Log | |  |
|  | isVerified | True/False (boolean) | True/Default: False | Verification of information before submission of data.  Coaching Log | |  |
|  | SubmittedDate | Date and Time (datetime) |  | Date and Time Record is Loaded  Coaching Log and Warning\_Log | |  |
|  | StartDate | Date and Time (datetime) |  | Date and Time initial form load (Same as Submitted Date)  For IQS this is the same as the IQS Evaluation Date  This is the driver for identifying the Hierarchy  Coaching Log  FK to CSR\_Hierarchy | |  |
|  | SupReviewedAutoDate | Date and Time (datetime) |  | Indirect: Date and Time [strCSRSup] reviewed form.  From form submit.  Coaching Log | |  |
|  | isCSE | True/False (boolean) | True/False | Verification of Customer Service Escalation by [strCSRMgr]  Coaching Log | |  |
|  | MgrReviewManualDate | Date and Time (datetime) |  | Date and Time [strCSRMgr] opened and reviewed form when [isCSE] ≠ True.  From Submit.  Coaching Log | |  |
|  | MgrReviewAutoDate | Date and Time (datetime) |  | Date and Time [strCSRMan] reviewed form.  From form submit.  Coaching Log | |  |
|  | MgrNotes | Text (string) |  | [StrCSRMgr] Explanation for [strCSR] and [strCSRSup] with reasons why this is not a CSE.  Coaching Log | |  |
|  | isCSRAcknowledged | True/False (boolean) | True/False | [strCSR] acknowledgement they have read and understand all the information provided in the eCL.  Coaching Log | |  |
|  | CSRReviewAutoDate | Date and Time (datetime) |  | Date and Time [strCSR] reviewed form.  From form submit.  Coaching Log | |  |
|  | txtCSRComments | Text (string) |  | [strCSR] comments and feedback.  Coaching Log | |  |
|  | SourceID | Whole Number (integer) |  | ID representing Coaching Source and Sub Coaching Source  Coaching\_Log and Warning\_Log  FK to Dim\_Source | |  |
|  | Verint\_EvalID | Text (string) |  | IQS/Verint Details Table  Coaching\_Log | |  |
|  | ProgramName | Text (string) | Medicare, Marketplace, or N/A | Coaching\_Log and Warning\_Log  All historical data prior to 6/1/2013 is mapped to Medicare. The 1 Multicode is used to determine Medicare or Marketplace for historical data after 6/1/2013. N/A will be for non-program associated logs. | |  |
|  | Emp\_Name | Text (string) |  | Employee Full Name (Last, First MI)  Employee\_Hierarchy | |  |
|  | Emp\_Email | Text (string) |  | Employee Email Address  Employee\_Hierarchy | |  |
|  | Emp\_LanID | Text (string) |  | Employee LAN ID  Employee\_Hierarchy | |  |
|  | Emp\_Site | Text (string) |  | Name of site where employee is is located  Employee\_Hierarchy | |  |
|  | Emp\_Job\_Code | Text (string) |  | Peoplesoft Job Code for the employee  Employee\_Hierarchy | |  |
|  | Emp\_Job\_Description | Text (string) |  | Employee’s job description  Employee\_Hierarchy | |  |
|  | SupID | Whole Number (integer) |  | Sup Employee ID  Employee\_Hierarchy  FK to CSR\_Hierarchy | |  |
|  | Sup\_Email | Text (string) |  | Sup Email Address  Employee\_Hierarchy | |  |
|  | Sup\_LanID | Text (string) |  | Sup LAN ID  Employee\_Hierarchy | |  |
|  | Sup\_Job\_Code | Text (string) |  | Peoplesoft Job Code for the supervisor  Employee\_Hierarchy | |  |
|  | Sup\_Job\_Description | Text (string) |  | Supervisor’s job description  Employee\_Hierarchy | |  |
|  | MgrID | Whole Number (integer) |  | Manager’s Employee ID  Employee\_Hierarchy  FK to CSR\_Hierarchy | |  |
|  | Mgr\_Email | Text (string) |  | Manager’s Email Address  Employee\_Hierarchy | |  |
|  | Mgr\_LanID | Text (string) |  | Manager’s LAN ID  Employee\_Hierarchy | |  |
|  | Mgr\_Job\_Code | Text (string) |  | Peoplesoft Job Code for the manager  Employee\_Hierarchy | |  |
|  | Mgr\_Job\_Description | Text (string) |  | Manager’s job description  Employee\_Hierarchy | |  |
|  | Emp\_Program | Text (string) | Marketplace/Medicare/NA | Program as determined by WFM 1Multi code  Employee\_Hierarchy | |  |
|  | Start\_Date | Date and Time (datetime) |  | Employee’s Hire Date from Peoplesoft  Employee\_Hierarchy | |  |
|  | End\_Date | Date and Time (datetime) |  | Date the Employee left the company  When we receive a hierarchy file containing a rehired Employee, the End\_Date will be updated to 99991231 and the Active status will change to A.  Employee\_Hierarchy  FK to CSR\_Hierarchy | |  |
|  | Active | Text (string) |  | Active status for the employee  When we receive a hierarchy file containing a rehired Employee, the End\_Date will be updated to 99991231 and the Active status will change to A.  Employee\_Hierarchy | |  |
|  | CoachingReasonID | Whole Number (integer) |  | ID representing the type of Coaching Reason  PK for Coaching\_Log\_Reason and Warning\_Log\_Reason  FK to Dim\_Sub\_Coaching\_Reason | |  |
|  | SubCoachingReasonID | Whole Number (integer) |  | ID representing the type of SubCoaching Reason  PK for Coaching\_Log\_Reason and Warning\_Log\_Reason  FK to Dim\_Coaching\_Reason | |  |
|  | Description | Text (string) |  | Details for the reason for the coaching (Note: for IQS records this will also contain the QS Coaching Notes. The Summary of Call will be followed by a carriage return and the words COACHING NOTES)  Note: When IQS feeds are received, containing updated logs that are still Open in our system, this field will be updated to match the newest feed.  Coaching\_Log | |  |
|  | CoachingNotes | Text (string) |  | Details from the coaching session including action plans developed.  Coaching\_Log | |  |
|  | Value | Text (string) | Valid values:  Opportunity  Reinforcement  Opportunity-PWC  Met goal  Did not meet goal | Coaching\_Log\_Reason and Warning\_Log\_Reason | |  |
|  | CoachingSource | Text (string) |  | Direct/Indirect/OMR/IQS  Direct: What type of coaching are you doing today?  Indirect: How was the coaching opportunity identified?  DIM\_Source | |  |
|  | SubCoachingSource | Text (string) |  | **Direct:**  ARC  BCC Security and Privacy Incident Coaching  CMS Reported Item  CSAT  CSET  CSR Reported Issue  Internal CCO Reporting  IQS (This is system generated not in UI and will identify records prior to have three separate values)  LimeSurvey (This is system generated not in UI and will identify records from Lime Survey)  Verint-GDIT (This is system generated not in UI and will identify records from Verint GDIT quality)  Verint-TQC (This is system generated not in UI and will identify records from Verint quality contractor)  Leadership Listening  Manager Coaching  OMR (This is system generated not in UI)  Other  Quality Call Listening  Quality Specialist Coaching  Supervisor Coaching  Training and Development  Unknown  Verint Quality Monitoring  Walk-By  **Indirect:**  ARC  BCC Security and Privacy Incident Coaching  CMS Reported Item  CSAT  CSET  CSR Reported Issue  Internal CCO Reporting  IQS (This is system generated not in UI and will identify records prior to have three separate values)  LimeSurvey (This is system generated not in UI and will identify records from Lime Survey)  Verint-GDIT (This is system generated not in UI and will identify records from Verint GDIT quality)  Verint-TQC (This is system generated not in UI and will identify records from Verint quality contractor)  Leadership Listening  Manager Coaching  OMR (This is system generated not in UI)  Other  Quality Call Listening  Quality Specialist Coaching  Supervisor Coaching  Training and Development  Unknown  Verint Quality Monitoring  Walk-By  DIM\_Source | |  |
|  | CoachingReason | Text (string) |  | AHT (The amount of time a Employee takes to complete a beneficiary call.)  ARC Issue (Advanced Resolution Center Escalation)  Attendance (Being at your work station and available for duty on your regular scheduled days except for management excused absences and as defined by HCSD-HR-MISC-05 ATTENDANCE GUIDELINE and Per [FIN-POL-1 Time Recording](http://teamworks.gdit.com/uploadedFiles/Policies_Forms/Finance-Administration/Policies/FINPOL01.pdf))  CCO Process Procedure Issues (Any process procedure)  Current Coaching Initiative (These currently include RMAs, EE/MMs, DMEPOS, Short Calls(Mapped to Other: Other: Specify reason under coaching details SubCoachingReason for historical data, new data uses the OMR Short Calls Inbound\Outbound SubCoachingReasons), Transferred calls, Canceled calls, Disenrollment, etc. These can change periodically.)  Customer Service Escalation (A series of activities designed to enhance the level of customer satisfaction – that is, the feeling that a product or service has met the customer expectation.  (An issue in this case would be a failure to meet the above definition.)  Feedback (Feedback from another Employee through their manager or supervisor or feedback from CMS.)  HR Guideline Issues (Any abuse to the HR Guidelines)  OMR / Exceptions  Quality (Quality Call Monitoring)  Recognition (Any positive reinforcement for Employees like KUDOS.)  Schedule Adherence (Scheduled work time minus unapproved exceptions divided by scheduled work time.)  Secure Floor Violations (Employee not following the Secure Floor security requirements.)  Verbal Warning  Written Warning  Final Written Warning  DIM\_Coaching\_Reason | |  |
|  | SubCoachingReason | Text (string) |  | Blank row at the top of the dropdown list  Argues  Yells, screams  Uses Profanity of any kind  Uses derogatory/disrespectful words  Threatens caller / employee  Intentionally disconnects caller instead of greeting caller and handling call.  Blind transfers caller  Encourages /commits fraud  Verbally abusive  Inappropriate NGD Feedback  CSAT  Casework Adhoc requests from CMS  Casework Bene Letter  Casework CTM  Casework Inappropriate ARC Escalation  Casework ISG Escalation  Complaints Research  Special Projects  OMR: Cancelled Calls  OMR: Default Qualifiers  OMR: FFM T2 Transfers  OMR: Open Calls  OMR: Short Calls - Inbound  OMR: Short Calls - Outbound  OMR: ACW  OMR: AHT  OMR: CCO Security and Privacy Incident Coaching  OMR: Inappropriate ACO Escalation  OMR: Inappropriate ARC Escalation  OMR: Inappropriate DME Escalation  OMR: Inappropriate EE/MM Escalation  OMR: Inappropriate NGD Feedback  OMR: ISG Consults  OMR: Low CSAT  OMR: NGD Inappropriate Transfer  OMR: Returned MAC Escalation  OMR: Scripts Logged  OMR: Transfers  Other: Other: Specify reason under coaching details  Exception Reporting Disenrollment  Exception Reporting Inappropriate Transfers  Exception Reporting PDP Complaints  Enters authorization error compromising PHI  Security and Privacy Incident  Verbal Warning, Written Warning, and Final Written Warning reasons: Attendance, Conduct (including Call Avoidance), ETS, Quality/Performance, Security or Privacy Issue, Other Policy (non-Security/Privacy)  DIM\_Sub\_Coaching\_Reason | |  |
|  | DateKey | Whole Number (integer) |  | DIM\_Date | |  |
|  | FullDate | Date (datetime) |  | DIM\_Date | |  |
|  | DateName | Text (string) |  | DIM\_Date | |  |
|  | DayofWeek | Whole Number (integer) |  | DIM\_Date | |  |
|  | DayNameOfWeek | Text (string) |  | DIM\_Date | |  |
|  | DayOfMonth | Whole Number (integer) |  | DIM\_Date | |  |
|  | WeekOfYear | Whole Number (integer) |  | DIM\_Date | |  |
|  | MonthName | Text (string) |  | DIM\_Date | |  |
|  | MonthOfYear | Whole Number (integer) |  | DIM\_Date | |  |
|  | CalendarQuarter | Whole Number (integer) |  | DIM\_Date | |  |
|  | CalendarYear | Whole Number (integer) |  | DIM\_Date | |  |
|  | CalendarYearMonth | Text (string) |  | DIM\_Date | |  |
|  | CalendarYYYYQQ | Text (string) |  | DIM\_Date | |  |
|  | City | Text (string) |  | DIM\_Site | |  |
|  | State | Text (string) |  | DIM\_Site | |  |
|  | StateCity | Text (string) |  | DIM\_Site | |  |
|  | EmailSent | True/False (boolean) | Default: False | Email has been sent to Employee\Supervisor\ Manager  Coaching Log | |  |
|  | H\_Start\_Date | Date and Time (datetime) | Date started reporting to Supervisor/Manager | CSR\_Hierarchy | |  |
|  | H\_Stop\_Date | Date and Time (datetime) | Date last reported to Supervisor/Manager | CSR\_Hierarchy | |  |
|  | ModuleID | Whole Number (integer) | 1 = CSR  2 = Supervisor  3 = Quality  4 = LSA  5 = Training | Coaching\_Log and Warning\_Log | |  |
|  | Active | True/False (Boolean) |  | Warning\_Log  Note: default will be True and will be set to False 13 weeks after date warning is given | |  |
|  | SupID | Whole Number (integer) |  | Employee’s Supervisor ID at time of log submission  Coaching\_Log and Warning\_Log | |  |
|  | MgrID | Whole Number (integer) |  | Employee’s Manager ID at time of log submission  Coaching\_Log and Warning\_Log | |  |
|  | Review\_SupID | Whole Number (integer) |  | Supervisor who reviewed and signed the log  Coaching\_Log | |  |
|  | Review\_MgrID | Whole Number (integer) |  | Manager who reviewed and signed the log  Coaching\_Log | |  |
|  | Behavior | Text (string) | Production, Training, Other | Coaching\_Log | |  |
| **Notes:** Historical data that has strCoachReason\_ShortCalls will be mapped to SubCoachingReason Other: Specify reason under coaching details, because it has been replaced with the SubCoachingReasons OMR: Short Calls – Inbound and OMR: Short Calls – Outbound. Historical data that is missing SubCoachingReason will be mapped to Other: Specify reason under coaching details. Historical data that is missing hierarchical associations to supervisor or manager should use the current supervisor or manager. | | | | | | |
|  | User Interface Controls |  |  | |  |  |
|  | eCL Weekly Compliance Report | Email | Weekly view of completed forms and pending forms related to form timeframe completion requirements. | | Reports – CCO, QA-OPS |  |
|  | eCL Monthly Compliance Report | Email | Monthly view of completed forms and pending forms related to form timeframe completion requirements. | | Reports – CCO |  |
|  | eCL Monthly Coaching Reason Trend Analysis | Email | Monthly view of coaching reasons by form type, site, manager and source. | | Reports – CCO |  |
|  | eCL Quarterly Coaching Reason Trend Analysis | Email | Quarterly view of coaching reasons by form type, site, manager and source of opportunity. | | Reports – CCO |  |
|  | Manager Dashboard | Web | Access to completed and pending eCL forms for Employees and Superiors on team. | | Reports – CCO Managers |  |
|  | Supervisor Dashboard | Web | Access to completed and pending eCL forms for Employees on team. | | Reports – CCO Supervisors |  |
|  | Employee Dashboard | Web | Access to completed and pending eCL forms. | | Reports – CCO Employees |  |
|  | eCL Reporting Dashboard | Web | Self-service tool with cross site and team access to completed eCL form data. | | Reports |  |
|  | For non-Customer Service Escalations, Employees will receive an e-mail notifying them that they have a pending eCoaching log to review. The e-mail contains a link to the eCoaching Log.  The Employee can use the e-mail link to access the eCoaching Log to review the coaching notes with his or her supervisor .  If it is a CSE the manager will write the Action Plan and assist in Coaching the Employee. |  | For IQS Monitors, Employees and Supervisors do need to acknowledge the log. New monitors in the feed will generate new eCoaching logs and appealed monitors will update existing eCoaching logs. | |  |  |
|  | My Pending eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions | | Employee Interface |  |
|  | My Completed eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions | | Employee Interface |  |
|  | Coaching Notes | Coaching Acknowledgment Form (Static Text) | Specific coaching notes for this eCoaching Log record | | Employee Interface |  |
|  | “I have read and understand all the information provided on this eCoaching Log” | Coaching Acknowledgment Form (CheckBox) | Note: display the following text on the Pending Employee Review page after number  1 Check the box below to acknowledge the coaching opportunity:  Your signature below signifies that you are acknowledging this discussion. It does not indicate that you agree or disagree with the coaching discussion. | | Employee Interface |  |
|  | Comments | Coaching Acknowledgment Form (Text Box) | Employee’s comments regarding this coaching record | | Employee Interface |  |
|  | Submit | Coaching Acknowledgment Form (Button) | Submits the Form | | Employee Interface |  |
|  | “Select Coaching Module” | Submit Record Form (Drop Down List Box) | List is populated based on job code.   * CSR * Quality * Supervisor * LSA * Training | | Supervisor/Support Staff Interface |  |
|  | “Select the Employee Site” | Submit Record Form (Drop Down List Box) |  | | Supervisor/Support Staff Interface |  |
|  | “Select the Employee’s Name” | Submit Record Form (Drop Down List Box) | List is populated from Peoplesoft based on employees having “Service Rep” in their job title. | | Employee Interface |  |
|  | “Employee’s Supervisor Name” | Submit Record Form (List Box) | Auto Populated from PeopleSoft Hierarchy | | Supervisor/Support Staff Interface |  |
|  | “Employee’s Manager Name” | Submit Record Form (List Box) | Auto Populated from Peoplesoft and eWFM Hierarchy | | Supervisor/Support Staff Interface |  |
|  | “Will you be delivering the coaching session? | Submit Record Form (Radio Buttons) | Yes, I will be delivering the coaching session.  No, I will not be delivering the coaching session. | | Supervisor/Support Staff Interface |  |
|  | “Do you need to submit a progressive disciplinary action (WARNING)?  Not available if the submitter is not the Employee’s immediate Supervisor or Manager as defined in the Employee Hierarchy or if coaching is Indirect (No, I will not be delivering the coaching session.) | Submit Record Detail Form (Radio Buttons) | Yes/No | | Supervisor/Support Staff Interface |  |  |
|  | “Enter / Select the date of coaching” | Submit Record Detail Form (Calendar\Text) | Note: Can’t enter future dates | | Supervisor/Support Staff Interface |  |
|  | “Is this a Customer Service Escalation?”  Not available if Warning | Submit Record Detail Form (Radio Buttons) | Yes/No | | Supervisor/Support Staff Interface |  |
|  | “Select the type of coaching from the categories below” | Submit Record Detail Form | Opportunities are defined as an interaction where the Employee has an opportunity to improve their performance.  Reinforcement is an interaction where the Employee is meeting expectations and we want to reinforce positive behaviors. | | Supervisor/Support Staff Interface |  |
|  | AHT | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Keeping the call on task * Navigational efficiency * Non transfer opportunity * Over servicing the caller * Utilizing appropriate scripting * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | ARC Issue | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Casework Adhoc requests from CMS * Casework Bene Letter * Casework CTM * Casework Inappropriate ARC Escalation * Casework ISG Escalation * Complaints Research * Special Projects * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Attendance | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * ETS * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface  (Note: ETS will be available for Supervisors and Managers only) |  |
|  | CCO Process Procedure Issues | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Security and Privacy Incident * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Current Coaching Initiatives | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Customer Service Issue | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Argues * Blind transfers call * Encourages / commits fraud * Enters authorization error compromising PHI * Intentionally disconnects caller * Threatens caller / employee * Uses derogatory/disrespectful words * Uses profanity of any kind * Verbally abusive * Yells, screams * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Feedback (Employee And Customer) | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Inappropriate NGD Feedback * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | HR Guideline Issues | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | OMR Exceptions | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Exception Reporting Inappropriate Transfers * Exception Reporting PDP Complaints * OMR: ACW * OMR: AHT * OMR: CCO Security and Privacy Incident Coaching * OMR: Default Qualifiers * OMR: FFM T2 Transfers * OMR: Inappropriate ACO Escalation * OMR: Inappropriate ARC Escalation * OMR: Open Calls * OMR: Short Calls – Inbound * OMR: Short Calls – Outbound * Exception Reporting Disenrollment * OMR: Cancelled Calls * OMR: Inappropriate DME Escalation * OMR: Inappropriate EE/MM Escalation * OMR: Inappropriate NGD Feedback * OMR: ISG Consults * OMR: Low CSAT * OMR: NGD Inappropriate Transfer * OMR: Returned MAC Escalation * OMR: Scripts Logged * OMR: Transfers | | Supervisor/Support Staff Interface |  |
|  | Quality | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Accuracy / Completeness * Admin Procedure * CSAT * Customer Service * Privacy * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface | Note: Quality Reasons will translate Opportunity as Did not meet Goal and Reinforcement as Met goal. |
|  | Recognition | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Reinforcement   * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Secure Floor Violations | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Schedule Adherence | Submit Record Detail Form (Checkbox/Radio Buttons / Dropdown List Box) | Opportunity or Reinforcement   * Other: Specify reason under coaching details. | | Supervisor/Support Staff Interface |  |
|  | Verbal Warning  Not available if Written Warning or Final Written Warning selected. | Submit Record Detail Form (/Dropdown List Box / Dropdown List Box) | Opportunity   * Attendance * Conduct (including Call Avoidance) * ETS * Quality/Performance * Security or Privacy Issue * Other Policy (non-Security/Privacy) | | Supervisor |  |
|  | Written Warning  Not available if Verbal Warning or Final Written Warning selected. | Submit Record Detail Form (Dropdown List Box/ Dropdown List Box) | Opportunity   * Attendance * Conduct (including Call Avoidance) * ETS * Quality/Performance * Security or Privacy Issue * Other Policy (non-Security/Privacy) | | Supervisor |  |
|  | Final Written Warning  Not available if Verbal Warning or Written Warning selected. | Submit Record Detail Form (Dropdown List Box/ Dropdown List Box) | Opportunity   * Attendance * Conduct (including Call Avoidance) * ETS * Quality/Performance * Security or Privacy Issue * Other Policy (non-Security/Privacy) | | Supervisor |  |
|  | “Provide details of the behavior to be coached”  Not available if Warning. | Submit Record Detail Form (Text Box) |  | | Supervisor/Support Staff Interface |  |
|  | Direct:  “Provide the details from the coaching session including action plans developed”  Not available if Warning. | Submit Record Detail Form (Text Box) |  | | Supervisor/Support Staff Interface |  |
|  | “How was the coaching opportunity identified?”  Not available if Warning however, Warning should be the default if Verbal, Written or Final Written Warning. | Submit Record Detail Form (Dropdown List Box) |  | | Supervisor/Support Staff Interface |  |
|  | Indirect Non CSE  “Is there a Call Record or NGD ID associated with this coaching?”  Direct and Indirect CSE and Direct Non CSE  “Is there a Call Record associated with this coaching?”  Not available if Warning | Radio/Drop Down List Box/Free Form text | Yes/No | |  |  |
|  | “I have verified that all the information on this form is true and complete to the best of my knowledge”  Not available if Warning | Submit Record Detail Form (CheckBox) |  | |  |  |
|  | Submit | Submit Record Detail Form (Button) | Once the Submit button is pressed you cannot make edits.  For Direct non Customer Service Escalations and not Quality Specialist Coaching, an email is automatically sent to the Employee alerting them of the eCL record and providing a link to it.  For Indirect non Customer Service Escalations, an email is automatically sent to the Supervisor alerting them of the eCL record and providing a link to it.  For Customer Service Escalations, an email is sent and the form is routed to the Manager to determine whether it’s a CSE or not. If it is, the manager adds details of why it’s a CSE and action plans. The Employee will be coached by the Manager and Supervisor in this case. | |  |  |
|  | Name | My Recent Submissions List  (WebLink) | CoachingID  Opens Acknowledgement Form for the Record | | Supervisor/Support Staff Interface |  |
|  | StrFormStatus | My Recent Submissions List  (Static Text Field) | Status (Pending\Completed)  It should be based on the value of strCoachReason\_CSE. If strCoachReason\_CSE is Not Null, the StrFormStatus is set to Pending Manager review and the Opportunity for CSE is marked | | Supervisor/Support Staff Interface |  |
|  | SubmittedDate | My Recent Submissions List  (Static Text Field) | Date Loaded  Primary Sorting field in Reverse Chronological Order  Default is last 30 days. | | Supervisor/Support Staff Interface |  |
|  | My Pending eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions  Note: at the supervisor level, the hierarchy shows logs associated with each Employee in a tree view by alphabetical order | | Supervisor/Support Staff Interface |  |
|  | My Employee’s Pending eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions  Note: at the supervisor level, the hierarchy shows logs associated with each Employee in a tree view by alphabetical order | | Supervisor/Support Staff Interface |  |
|  | My Completed eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions  Note: at the supervisor level, the hierarchy shows logs associated with each Employee in a tree view by alphabetical order | | Supervisor/Support Staff Interface |  |
|  | For Customer Service Escalations (CSEs), the form is routed to the manager via email to confirm whether the event was a CSE. If the manager confirms that the event was a CSE, he or she will enter an action plan in the coaching notes. Once completed, a coaching session with the Employee, manager, and supervisor will occur |  |  | | Supervisor/Support Staff Interface |  |
|  | Coaching Reasons | Review Pending Records Form  (Static Text) |  | | Manager Interface |  |
|  | Details of the behavior being coached | Review Pending Records Form  (Static Text) |  | | Manager Interface |  |
|  | Coaching Notes | Review Pending Records Form  (Static Text) |  | | Manager Interface |  |
|  | “Is the Coaching opportunity a confirmed Customer Service Escalation?” | Review Pending Records Form (Radio Buttons)  Mark “Yes” if it’s determined to be a CSE or change to “No” if it’s not a CSE |  | | Manager Interface |  |
|  | “Enter /Select the date of coaching:” | Review Pending Records Form  (Calendar Control) |  | | Manager Interface |  |
|  | Direct:  “Provide the details from the coaching session including action plans developed” | Review Pending Records Form  (Text Box) |  | | Manager Interface |  |
|  | Submit | Review Pending Records Form  (Button) | Once the Submit button is pressed you cannot make edits.  The form is routed to the next lower level for review.  See Workflow below | |  |  |
|  | My Pending eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions  Note: at the manager level, the hierarchy shows logs associated with each Supervisor in a tree view by alphabetical order | | Manager Interface |  |
|  | My Completed eCoaching Logs | Coaching Logs List\Dashboard | See My Recent Submissions List for field definitions  Note: at the manager level, the hierarchy shows logs associated with each Supervisor in a tree view by alphabetical order | | Manager Interface |  |
|  | If the user needs more information of what type of content goes into each field, he or she may hover over the information icon. | All Forms  (ToolTips) |  | | Manager Interface |  |
| 65 | Generic (Quality/Training Job Title) Dashboard | Web | Access to completed and pending eCL forms for Employees on team with Title “Welcome to the eCL Dashboard”. | | All Users |  |
| 66 | “Select the appropriate program for this coaching:**”** | Web  (Dropdown List Box) | List is populated with:   * Medicare * Marketplace * N/A | | Available in CSR, Supervisor, Quality modules |  |
| 67 | “Where was this behavior observed?” | Web  (Dropdown List Box) | List is populated with:   * Production * Training * Other | | Available in Training module |  |

# - Unique identifier associated with the requirement allocated.

# Program Requirements

## Supervisors must conduct at least one eCoaching session per week

## Portability and accessibility to both the customer service representatives (Employees), direct and subsequent supervisors, and managers.

## The eCoaching Log form is predominately displayed in the middle of the home page.

## The dashboard is filtered by each user so users cannot view other’s records unless authorized to do so. Also, Verbal Warning, Written Warning and Final Written Warning logs will appear on the dashboard for supervisors and managers identified in the employee hierarchy. This will include senior managers, deputy directors, and regional managers who are higher in the employee hierarchy.

## The Employee\Supervisor\Manager should access the My Submitted, Dashboard, and Historical Dashboards from the shortcut on their desktop. They can also view their Dashboard from the eCoaching Log Dashboard tab on the Performance Scorecard. The main page accessed from the desktop shortcut, has tabs for each (My Submitted, Dashboard, and Historical).

## Issues will be submitted to a central database for the Site Administrators to review and resolve. When submitting issues, users should include screenshots as an attachment, hyperlinks, form fields, and, if possible, try to replicate the issue.

## Each individual Coaching and Warning Logs should contain the necessary information to determine the Employee’s Supervisor and Manager at the time of submission.

## Each individual Coaching Log should contain the necessary information to determine the Employee’s Manger who reviewed and signed the log and the Employee’s Supervisor who reviewed and signed the log.

## Human Resources will have access to the Historical Dashboard and all Coaching and Warning logs. Warning logs will not be available for anyone else on the Historical Dashboard.

## Submitters of eCoaching Logs will not be allowed to submit logs to themselves (where they are the recipient of the log).

## Senior managers, deputy directors, and regional managers will have access to eCoaching logs and Warning logs for employees within their hierarchy structure even if not direct reports. Senior managers, deputy directors, and regional managers are defined by those who have an entry in the Historical Dashboard Access Control List with a code of SRMGR.

# Layouts



Direct Coaching – Progressive Disciplinary Warning



Verbal Warning:

* Attendance
* Conduct (including Call Avoidance)
* ETS
* Quality/Performance
* Security or Privacy Issue
* Other Policy (non-Security/Privacy)

Written Warning:

* Attendance
* Conduct (including Call Avoidance)
* ETS
* Quality/Performance
* Security or Privacy Issue
* Other Policy (non-Security/Privacy)

Final Written Warning:

* Attendance
* Conduct (including Call Avoidance)
* ETS
* Quality/Performance
* Security or Privacy Issue
* Other Policy (non-Security/Privacy)

How was the coaching opportunity identified?

* Warning

Direct Coaching - CSE





Customer Service Escalation:

* Argues
* Blind transfers call
* Encourages / commits fraud
* Enters authorization error compromising PHI
* Intentionally disconnects caller
* Threatens caller / employee
* Uses derogatory/disrespectful words
* Uses profanity of any kind
* Verbally abusive
* Yells, screams
* Other: Specify reason under coaching details.

How was the coaching opportunity identified?

* CMS Reported Item
* CSR Reported Issue
* Internal CCO Reporting
* Leadership Listening
* Manager Coaching
* Quality Call Listening
* Quality Specialist Coaching
* Supervisor Coaching
* Training and Development
* Verint Quality Monitoring
* Walk-By

Is there a Call Record associated with this coaching?

* Verint
* NGD ID
* Avoke
* UCID

Direct Coaching – Non CSE





AHT:

* Keeping the call on task
* Navigational efficiency
* Non transfer opportunity
* Over servicing the caller
* Utilizing appropriate scripting
* Other: Specify reason under coaching details.

ARC Issue:

* Casework Adhoc requests from CMS
* Casework Bene Letter
* Casework CTM
* Casework Inappropriate ARC Escalation
* Casework ISG Escalation
* Complaints Research
* Special Projects
* Other: Specify reason under coaching details.

Attendance:

* ETS (note available for direct coaching only by supervisors and managers – WSAQ70, WACS40, WACS50, WACS60)
* Other: Specify reason under coaching details.

CCO Process Procedure Issues:

* Security and Privacy Incident
* Other: Specify reason under coaching details.

Current Coaching Initiatives:

* Other: Specify reason under coaching details.

Feedback:

* Inappropriate NGD Feedback
* Other: Specify reason under coaching details.

HR Guideline Issues:

* Other: Specify reason under coaching details.

OMR / Exceptions:

* Exception Reporting Inappropriate Transfers
* Exception Reporting PDP Complaints
* OMR: ACW
* OMR: AHT
* OMR: Cancelled Calls
* OMR: CCO Security and Privacy Incident Coaching
* OMR: Default Qualifiers
* OMR: FFM T2 Transfers
* OMR: Inappropriate ACO Escalation
* OMR: Inappropriate ARC Escalation
* OMR: Open Calls
* OMR: Short Calls – Inbound
* OMR: Short Calls – Outbound
* Other: Specify reason under coaching details.

Quality:

* Accuracy / Completeness
* Admin Procedure
* CSAT
* Customer Service
* Privacy
* Other: Specify reason under coaching details.

Recognition:

* Other: Specify reason under coaching details.

Schedule Adherence:

* Other: Specify reason under coaching details.

Secure Floor Violations:

* Other: Specify reason under coaching details.

Indirect Coaching CSE





Customer Service Escalation:

* Argues
* Blind transfers call
* Encourages / commits fraud
* Enters authorization error compromising PHI
* Intentionally disconnects caller
* Threatens caller / employee
* Uses derogatory/disrespectful words
* Uses profanity of any kind
* Verbally abusive
* Yells, screams
* Other: Specify reason under coaching details.

Indirect Coaching – Non CSE



AHT:

* Keeping the call on task
* Navigational efficiency
* Non transfer opportunity
* Over servicing the caller
* Utilizing appropriate scripting
* Other: Specify reason under coaching details.

ARC Issue:

* Casework Adhoc requests from CMS
* Casework Bene Letter
* Casework CTM
* Casework Inappropriate ARC Escalation
* Casework ISG Escalation
* Complaints Research
* Special Projects
* Other: Specify reason under coaching details.

Attendance:

* Other: Specify reason under coaching details.

CCO Process Procedure Issues:

* Security and Privacy Incident
* Other: Specify reason under coaching details.

Current Coaching Initiatives:

* Other: Specify reason under coaching details.

Feedback

* Inappropriate NGD Feedback
* Other: Specify reason under coaching details.

HR Guideline Issues:

* Other: Specify reason under coaching details.

OMR / Exceptions:

* Exception Reporting Inappropriate Transfers
* Exception Reporting PDP Complaints
* OMR: ACW
* OMR: AHT
* OMR: Cancelled Calls
* OMR: CCO Security and Privacy Incident Coaching
* OMR: Default Qualifiers
* OMR: FFM T2 Transfers
* OMR: Inappropriate ACO Escalation
* OMR: Inappropriate ARC Escalation
* OMR: Open Calls
* OMR: Short Calls – Inbound
* OMR: Short Calls – Outbound
* Other: Specify reason under coaching details.

Quality:

* Accuracy / Completeness
* Admin Procedure
* CSAT
* Customer Service
* Privacy
* Other: Specify reason under coaching details.

Recognition:

* Other: Specify reason under coaching details.

Schedule Adherence:

* Other: Specify reason under coaching details.

Secure Floor Violations:

* Other: Specify reason under coaching details.

**Dashboard Permissions Criteria:**

The following users will have access to the eCoaching Dashboards according to their employee job codes:

Submission Page

* CSR level users – WACS01, WACS02, WACS03 who are in the database table “EC.Historical\_Dashboard\_ACL” table as an ARC CSR (Role = “ARC”)
* Supervisor level users - \*40,WTTR12,WTTI\*
* Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL\*
* Support Staff users – WSQE\*, WACQ\*, WIHD\*
* All other users with eCoaching access and which do not have an ‘Unknown’ job code
* Human Resources users – WHER13, WHHR11, WHHR12, WHHR13, WHHR14, WHHR80, WHRC11, WHRC12, WHRC13 will not have access

Main Dashboard

* CSR level users – WACS0\*
* Supervisor level users - \*40,WTTR12,WTTI\*
* Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL\*
* Support Staff users – WSQE\*, WACQ\*, WIHD\*
* All other users with eCoaching access and which do not have an ‘Unknown’ job code
* Human Resources users – WHER13, WHHR11, WHHR12, WHHR13, WHHR14, WHHR80, WHRC11, WHRC12, WHRC13 will not have access

Main Dashboard Review:

* Users who are the Employee of the record
* Users who are the Supervisor of the record’s Employee in record or hierarchy
* Users who are the Manager of the record’s Employee’s Supervisor in record or hierarchy
* For Warnings, only users who are the Supervisor or Manager of the record’s Employee in record or hierarchy may view

My Submitted:

* Supervisor level users - \*40,WTTR12, WTTI\*
* Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL\*
* Support Staff users – All other users except for users with CSR Job codes – WACS01, WACS02, WACS03, unless they are in the database table “EC.Historical\_Dashboard\_ACL” table as an ARC CSR (Role = “ARC”) – WACS01, WACS02, WACS03
* All other users with eCoaching access and which do not have an ‘Unknown’ job code
* Human Resources users – WHER13, WHHR11, WHHR12, WHHR13, WHHR14, WHHR80, WHRC11, WHRC12, WHRC13 will not have access

My Submitted Review:

* Supervisor level users - \*40,WTTR12, WTTI\*
* Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL\*
* Support Staff users – All other users except for users with CSR Job codes – WACS01, WACS02, WACS03.

Historical Dashboard:

* Supervisor and above level users - \*40, \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WSQE\*, WACQ\*, WEEX\*, WISY\*, WPWL\*
* Human Resources users – WHER\*, WHHR\*, WHRC\*

Historical Dashboard Review:

* Supervisor and above level users - \*40, \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WSQE\*, WACQ\*, WEEX\*, WISY\*, WPWL\*
* Human Resources users – WHER\*, WHHR\*, WHRC\*
* Users who are in the database table “EC.Historical\_Dashboard\_ACL” table as an historical exception user (Role = “ECL”) can open any record

If a coaching log record is Inactive, it should not be displayed on any dashboard.

**Dashboard Filter Values**

Certain fields allow for additional filtering to enable the user to limit or select the logs they want to view. The filters work in conjunction with each other so that results to be displayed will match all the filters selected. Not all filters are available for every Dashboard or section.

The Dashboard filters will contain the following values:

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Values** |
| 1 | Location | All Locations  Arlington  Bogalusa  Chester  Coralville  Corbin  Hattiesburg  Lawrence  London  Lynn Haven  Phoenix  Riverview  Sandy  Waco  Winchester  Note: initial default is All Locations |
| 2 | Employee | All Employees  Last name, First name, MI  Note: initial default is All Employees |
| 3 | Supervisor | All Supervisors  Last name, First name, MI  Note: initial default is All Supervisors |
| 4 | Manager | All Managers  Last name, First name, MI  Note: initial default is All Managers |
| 5 | Submitter | All Submitters  Last name, First name, MI  Unknown  Note: initial default is All Submitters |
| 6 | Status | All Statuses  Completed  Pending Acknowledgement  Pending Deputy Program Manager Review  Pending Employee Review  Pending Manager Review  Pending Quality Lead Review  Pending Sr. Manager Review  Pending Supervisor Review  Note: initial default is All Statuses |
| 7 | Value | All Values  Did not meet goal  Met goal  Opportunity  Opportunity-PWC  Reinforcement  Research Required  Note: initial default is All Values |
| 8 | Source | All Sources  ARC  CCO Security and Privacy Incident Coaching  CMS Contractor (NGS, VCS) Reported Issue  CMS Reported Item  CSAT  CSET  CSR Reported Issue  DMEPOS Escalations  ETS  Integrated Performance Center  Internal CCO Reporting  IQS  Leadership Listening  LimeSurvey  Manager Coaching  OMR  Other  Quality Call Listening  Quality Specialist Coaching  Supervisor Coaching  Training and Development  Verint Quality Monitoring  Verint-GDIT  Verint-TQC  Walk-By  Warning (displayed only for HR users)  Note: initial default is All Sources |
| 9 | Submitted | User entered start and end date in month, day, year format.  Note: initial default for start date is 30 days prior to the end date and end date is today. |
| 10 | State | All States  Active  Expired  Note: initial default is All States |

# Employee Dashboard

This dashboard allows the Employee to view their pending and completed eCLs. The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | My Pending eCoaching Logs | Employee Name = current user  Role = CSR  Status = Pending Employee Review | FormID (w/Link to form)  Employee Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | No Pagination (Show all records)  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 2 | My Completed eCoaching Logs | Employee Name = current user  Role = CSR  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

Employee Dashboard Filters

This dashboard does not have any additional filters

# Supervisor Dashboard

This dashboard allows the Supervisor (or manager acting as supervisor) to view their direct reports pending and completed as well as their own pending eCLs. The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time). Supervisors will be able to view Warning eCoaching Logs for their direct reports.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | My Pending eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Pending Supervisor Review  or Status =Pending Acknowledgment  or Status =Pending Employee Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | No Pagination (Show all records)  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 2 | My Teams Pending eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Pending Employee Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 3 | My Teams Completed eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 4 | My Completed eCoaching Logs | Employee Name = current user  Role = Supervisor  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 5 | My Teams Warning eCoaching Logs | Supervisor Name = current user  Role = Supervisor (job code WACS40)  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-Coaching Reason)  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 6 | My Submitted eCoaching Logs | Submitter Name = current user  Role = Support Staff | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

Supervisor Dashboard Filters

This Supervisor dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Dashboard – My Team’s Pending eCoaching Logs** | |
| A | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Source | Includes a list of possible source values of coaching logs. |
| 2 | **My Dashboard – My Team’s Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| D | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 3 | **My Dashboard – My Team’s Warning eCoaching Logs** | |
| A | State | Includes a list of possible state values of warning logs such as active or expired. |
| B | Submitted | Will include warning logs which were submitted or created between the entered start and end date range. |
| 4 | **My Submissions – My Submitted eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| D | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |

# Manager Dashboard

This dashboard allows the Manager (or supervisor acting as manager) to view their direct reports pending and completed as well as their own pending eCLs. The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time). Managers will be able to view Warning eCoaching Logs for their direct reports. Those users who have a role of SRMGR in the Historical\_Dashboard\_ACL will be able to view the eCoaching logs and Warning logs of those employees in their reporting structure, even if not direct reports.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | My Pending eCoaching Logs | Manager Name = current user  Role = Manager  Status = Pending Manager Review  or Status = Pending Sr. Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 10 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 2 | My Teams Pending eCoaching Logs | Manager Name = current user  Role = Manager  Status = Pending Employee Review, Pending Supervisor Review, Pending Acknowledgment | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 3 | My Teams Completed eCoaching Logs | Manager Name = current user  Role = Manager  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date or Form ID  Sorting can be done by selecting any column heading which has a hyperlink. |
| 4 | My Completed eCoaching Logs | Employee Name = current user  Role = Supervisor  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 5 | My Teams Warning eCoaching Logs | Manager Name = current user  Role = Manager (job codes WACS50, WACS60)  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-coaching Reason)  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 6 | My Hierarchy eCoaching Logs | Manager Name = current user  Role = Senior Manager (SRMGR in Historical Dashboard ACL)  Status = any | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 7 | My Hierarchy Warning eCoaching Logs | Manager Name = current user  Role = Senior Manager (SRMGR in Historical Dashboard ACL)  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-coaching Reason)  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 8 | My Submitted eCoaching Logs | Submitter Name = current user  Role = Support Staff | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

Manager Dashboard Filters

This Manager dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Dashboard – My Pending eCoaching Logs** | |
| A | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| 2 | **My Dashboard – My Team’s Pending eCoaching Logs** | |
| A | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| 3 | **My Dashboard – My Team’s Completed eCoaching Logs** | |
| A | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| D | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 4 | **My Dashboard – My Team’s Warning eCoaching Logs** | |
| A | State | Includes a list of possible state values of warning logs such as active or expired. |
| B | Submitted | Will include warning logs which were submitted or created between the entered start and end date range. |
| 5 | **My Dashboard – My Hierarchy eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| D | Source | Includes a list of possible source values of coaching logs. |
| E | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| F | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 6 | **My Dashboard – My Hierarchy Warning eCoaching Logs** | |
| A | State | Includes a list of possible state values of warning logs such as active or expired. |
| B | Submitted | Will include warning logs which were submitted or created between the entered start and end date range. |
| 7 | **My Submissions – My Submitted eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| D | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |

# Quality\Training Supervisor Dashboard

This dashboard allows the Quality or Training Supervisor to view their direct reports pending and completed as well as their own pending eCLs. The title of the Dashboard is “Welcome to the eCL Dashboard”. The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** | |
| 1 | My Pending eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Pending Supervisor Review  or Status = Pending Acknowledgment  or Status = Pending Employee Review  or Status = Pending Quality Lead Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | No Pagination (Show all records)  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 2 | My Teams Pending eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Pending Employee Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 3 | My Teams Completed eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 4 | My Completed eCoaching Logs | Employee Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 5 | My Submitted Pending eCoaching Logs | Submitter Name = current user  Role = Support Staff | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 6 | My Submitted Completed eCoaching Logs | Submitter Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

Quality\Training Supervisor Dashboard Filters

This Quality\Training Supervisor dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Dashboard – My Team’s Pending eCoaching Logs** | |
| A | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Source | Includes a list of possible source values of coaching logs. |
| 2 | **My Dashboard – My Team’s Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| D | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 3 | **My Submissions – My Submitted Pending eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| 4 | **My Submissions – My Submitted Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |

# Support Staff Dashboard

This dashboard allows support staff who submitted indirect eCLs to view the status of pending and completed records. The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | My Pending eCoaching Logs | Name = current user  Role = Support Staff  Status = Pending Acknowledgment, Pending Employee Review | FormID (w/Link to form)  Employee Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | No Pagination (Show all records)  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 2 | My Teams Pending eCoaching Logs | Name = current user  Role = Support Staff  Status = Pending Acknowledgement, Pending Employee Review, Pending Supervisor Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 3 | My Teams Completed eCoaching Logs | Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 4 | My Completed eCoaching Logs | Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 5 | My Submitted Pending eCoaching Logs | Submitter Name = current user  Role = Support Staff  Status = Pending Acknowledgment, Pending Employee Review, Pending Supervisor Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 6 | My Submitted Completed eCoaching Logs | Submitter Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

Support Staff Dashboard Filters

This Support Staff dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Dashboard – My Team’s Pending eCoaching Logs** | |
| A | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Source | Includes a list of possible source values of coaching logs. |
| 2 | **My Dashboard – My Teams Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| D | Submitted | Will include coaching logs which were submitted or created between the entered start and date end range. |
| 3 | **My Submissions – My Submitted Pending eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| 4 | **My Submissions – My Submitted Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |

# Historical Reporting Dashboard

When a customer service representative (Employee) changes teams, the supervisors and managers within the Employee’s new reporting assignment do not have access or visibility into the Employee’s past eCoaching Logs (eCL). This dashboard enables supervisors and managers to view all past and historical eCLs for their current Employee direct reports, regardless of the Employee’s past reporting structure.

Historical Employee eCoaching Logs dashboard access should be granted to Supervisor and Manager staff. Permissions to view the eCoaching log data, after the form is opened, will be restricted to only in the Employee’s current reporting organization in addition to the information in the form fields strCSR, strCSRSup, stsCSRMgr, and strSubmitter. The dashboard validation workflow shall validate the record if the requestor is either the supervisor or manager contained in the record or as the Employee’s current supervisor or manager as provided in the Employee’s organization in Peoplesoft and eWFM. No progressive disciplinary warnings will be displayed on the Historical Dashboard unless the viewer has a job code associated with Human Resources.

This dashboard allows managers and supervisors to view their direct reports’ pending and completed eCLs in a historical dashboard. The dashboard should have the same formatting and styles as the current dashboards provided on the eCL site.

The dashboard will have self-service filter fields above the top of the data grid. The filters will have an apply button that will submit the filter selections and apply to the data grid. The data grid should be empty until the apply button is selected which will then automatically refresh and display the eCoaching Log records based on the selected filter(s).

The user will be able to select the site name in the strCSRSite filter. After the strCSRSite filter is selected, the Employee Name filter field will refresh to narrow the Employee Name filter results to only the Employee’s located within the site selected. The user will then select a name in the Employee Name Filter and remaining filters to apply to the data grid.

A means to extract data from the Historical Dashboard to Excel should be provided.

Note: When IQS feeds are received, containing updated logs that are still Open in our system, these fields (isOpportunity, isReinforcement, numOpportunity, numReinforcement) will be updated to match the newest feed and these values will be used in the Historical Dashboard.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter Field Selections** | **Displayed Fields** | **Sort Options** |
| 1 | Historical Employee eCoaching Logs Dashboard | strCSRSite  Employee Name  Supervisor Name  Manager Name  Submitter  Status  Source  Values  Submitted Date From  Submitted Date To  Note: Only Human Resources users will have the option to filter by source of Warning. | FormID (w/Link to form)  Employee Name,  Supervisor Name  Manager Name  Submitter Name  Source  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date (submission date) | Data grid should be empty until filter(s) have been selected  Pagination = 50 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

Historical Dashboard Filters

This Historical dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| A | Location | Includes a list of locations or sites for contact center operations. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| D | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| E | Submitter | Includes the name of the person who submitted the coaching log. |
| F | Status | Includes the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| G | Source | Includes a list of possible source values of coaching logs. |
| H | Value | Includes the possible values associated with coaching logs. |
| I | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |

Access Control List

Another component of the historical dashboard is the eCL Access Control interface. It allows the administrators of the eCL to give specific people certain functionality within the system. Historical Dashboard Exception (ECL) users are granted access to open any record from the eCL historical dashboard, even if they are not included in the hierarchy of the particular log. Administrators can also designate specific users as ARC users which allow them to submit eCLs as Indirect which escalates items directly to Supervisors. ARC CSRs still have access to the “Review” page but only if the user is not the submitter. Users who are senior managers (designated with a role of SRMGR) will have access to coaching and warning logs for employees in their hierarchy structure on their main dashboard.

The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time).



# Review Page Informational Display

When displaying a form, the following information needs to be displayed. However, for Warnings, do not display labels or values for Source, Call Record ID (Verint, Avoke, NGD ID, UCID), or Scorecard Name. Also, Warnings will not have details, coaching notes or comments to display.

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Field Label** | **Condition/value** | **Description/source** |
| 1 | Page: | Display “Review” or “Final” |  |
| 2 | FormID: | Display | Form Name |
| 3 | Status: | Display | Status of coaching log |
| 4 | Date Submitted: | Display | Submitted Date |
| 5 | Type: | Display “Direct” or “Indirect” | Type of coaching |
| 6 | Date of Event: or  Date of Coaching or  Date the warning was issued | Display | Event Date or  Coaching Date or  Warning Given Date |
| 7 | Source: | Display | Coaching Source |
| 8 | Site: |  | City or site location |
| 9 | Verint ID: | If [isVerintID] = True  Then display  Else | Verint ID associated with coaching log |
| Avoke ID: | If [isAvokeID] = True  Then display  Else | Avoke ID associated with coaching log |
| NGD Activity ID: | If [isNGDActivityID] = True  Then display  Else | NGD Activity ID associated with coaching log |
| Universal Call ID: | If [isUCID] = True  Then display  Else  Don’t display label or field | UCID associated with coaching log |
| 10 | Scorecard Name: | If [isVerintID] = True  Then display  Else  Don’t display | Verint scorecard form name associated with coaching log |
| 11 | Employee: | Display | Name of the Employee |
| 12 | Supervisor: | Display | Name of the Employee’s supervisor |
| 13 | Manager: | Display  If [strReportCode] like ‘LCS’  Then display ‘(Assigned Reviewer)’ after the manager’s name | Name of the Employee’s manager or assigned reviewer |
| 14 | Submitter: | Display | Name of the submitter of the coaching log |

Examples:



Any information, such as dates and notes, entered on the Review Page from Manager, Supervisor, or Employee review shall be saved with eCoaching Log record.

# System Generated Emails

The following rules determine when emails are sent when there are pending eCLs. In addition to being able to see pending eCLs within the user’s dashboards users receive an email notification letting them know that they have an item to take action on.

Note: Scorecards from the quality data feed which match an existing record in the system will not be loaded. Matching records are those which have the same Evaluation ID.

# Pending Supervisor Review

Conditions and email text that is sent when an eCL record is in the state of “Pending Supervisor Review”.

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Form Type** | **Condition** | **Email Text** |
| 1 | Indirect | If eCoaching Log is Not “Customer Service Escalation”  Then [email text]  Note [strFormStatus] should = “Pending Supervisor Review” | strto = strCSRSupName <strCSRSupEmail>  strSubject = “eCL: Pending Supervisor Review (“ & strPerson & “)”  strCtrMessage = “A new eCoaching Log has been entered on behalf of <strong>strPerson</strong> on <strong>DateTime.Now().ToString </strong> that requires your action. Please click on the link below to review the eCoaching log. |

# Pending Manager Review

Conditions and email text that is sent when an eCL record is in the state of “Pending Manager Review”.

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Form Type** | **Condition** | **Email Text** |
| 1 | Indirect | If eCoaching Log Is “Customer Service Escalation”  Then [email text]  Note [strFormStatus] should = “Pending Manager Review” | strto = strCSRMgrName < strCSRMgrEmail >  strSubject = “eCL: Pending Manager Review (“ & strPerson & “)”  strCtrMessage = “A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <strong>DateTime.Now().ToString</strong> for <strong>strPerson</strong> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.” |
| 2 | Direct | If eCoaching Log Is “Customer Service Escalation” and the source is not “Manager Coaching “  Then [email text]  Note [strFormStatus] should = “Pending Manager Review” | strto = strCSRMgrName < strCSRMgrEmail >  strSubject = “eCL: Pending Manager Review (“ & strPerson & “)”  strCtrMessage = “A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <strong>DateTime.Now().ToString</strong> for strPerson is a valid Customer Service Escalation (CSE). Further directions are provided on the form.” |

# Pending Employee Review

Conditions and email text that is sent when an eCL record is in the state of “Pending Employee Review”.

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Form Type** | **Condition** | **Email Text** |
| 1 | Direct | If (eCoaching Log Is “Customer Service Escalation” and the source is “Manager Coaching”) or (eCoaching Log Is not “Customer Service Escalation” and the source is not “Quality Specialist Coaching”)  Then [email text] | strto = strCSRName <strCSREmail>  strSubject = “eCL: Pending Employee Review (“ & strPerson & “)”  strCtrMessage = “A new eCoaching Log has been entered on your behalf. Please click on the link below to review and verify the coaching opportunity received on <strong>DateTime.Now().ToString</strong>.” |

# No Email

Conditions when an eCL record is in the state of “Completed” (no email is sent).

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Form Type** | **Condition** | **Email Text** |
| 1 | Direct | If eCoaching Log is not “Customer Service Escalation” and the source Is “Quality Specialist Coaching”  Or  eCoaching Log source is “Warning”  Then Record status = “Completed” and No email sent |  |

# Email Format

Details the email formatting and how the above conditions fill the email header and body.

|  |
| --- |
| To – [strto] |
| Subject – [strSubject] |
| \*\* This is an automated email. Do not reply to this email. \*\*   [strCtrMessage]  Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details. [Link to Dashboard]  Form ID: [strFormID]  (Please do not respond to this automated notification)  Thank you, eCoaching Log Team http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png |

# Outliers (Data Feed\Form Entry)

**eCoaching Log [Outlier Research and Coaching Process]**

The eCL outlier research and coaching process is a standard process to facilitate consistent communication when a performance opportunity exists. It provides a method to make a determination of whether coaching is needed, when to initiate coaching and verification that the performance issue has been addressed

**eCL Outlier Research and Coaching Assumptions**

Outlier reports are created by the Analytics team which identifies thresholds and exceptions that require coaching or further research by Call Center Mangers (CCM). All items are entered into the eCL either through a Point of Contact (POC) via the standard entry form or through a data feed. Utilizing the eCL work-flow, items can be tracked from start to finish to verify if items have been addressed. The eCL will also provide reporting on the number of outliers entered into the system, the number coached, pending coaching, pending review or reasons why coaching was not required.

**eCL Outlier Research and Coaching Process**

High level process map for the eCL Outlier Research and Coaching.

**eCL Outlier Research and Coaching Process**



\* POC for manual entry or data feed is to be determined though the Outlier/Exception Management Process project led by the Analytics team.

\* Manager represents the direct Manager or the direct report requiring coaching as defined in Peoplesoft and eWFM. An exception will be for the Low CSAT (Customer Satisfaction) feed where designated managers will conduct the research on a rotating basis. Therefore, the manager will be identified in the feed file received by the eCoaching system.

\* Supervisor represents the direct Supervisor or the direct report requiring coaching as defined in Peoplesoft and eWFM.

\* Employee represents the individual requiring coaching as defined in the outlier reporting.

**Outlier Reporting Matrix**

The table below show all of the outlier reporting that will be entered into the eCL for direct coaching or manager review, the predetermined coaching thresholds and if items will be entered through the data feed or a POC. Only POC options will be available in the “*How was the coaching opportunity identified?”* question on the eCL entry form. Both POC and Data Feed types will be available in the Historical Dashboard dropdown list.

**eCL Outlier Reporting Matrix**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **#** | **Metric/Report** | **Coaching Threshold(s)** | **Code** | **eCL Workflow** | **Entry** | **Coaching Reason** |
| 1 | OMR: Inappropriate ACO Escalation |  | ACO | Direct Coach | POC | OMR / Exceptions |
| 2 | OMR: ACW |  | ACW | Direct Coach | POC | OMR / Exceptions |
| 3 | OMR: AHT |  | AHT | Direct Coach | POC | OMR / Exceptions |
| 4 | OMR: Cancelled Calls |  | CAN | Manager Review | Data Feed | OMR / Exceptions |
| 5 | OMR: Default Qualifiers |  | DFQ | Manager Review | Data Feed | OMR / Exceptions |
| 6 | OMR: Inappropriate ARC Escalation |  | IAE | Direct Coach | POC | OMR / Exceptions |
| 7 | OMR: Inappropriate DME Escalation |  | IDE | Direct Coach | POC | OMR / Exceptions |
| 8 | OMR: Inappropriate EE/MM Escalation |  | IEE | Direct Coach | POC | OMR / Exceptions |
| 9 | OMR: Inappropriate NGD Feedback |  | INF | Direct Coach | POC | OMR / Exceptions |
| 10 | OMR: ISG Consults |  | ISG | Manager Review | Data Feed | OMR / Exceptions |
| 11 | OMR: Short Calls – Inbound |  | ISQ | Manager Review | Data Feed | OMR / Exceptions |
| 12 | OMR: Low CSAT |  | LCS | Manager Review | Data Feed | OMR / Exceptions |
| 13 | OMR: Scripts Logged |  | SLG | Direct Coach | POC | OMR / Exceptions |
| 14 | OMR: NGD Inappropriate Transfer |  | NIT | Manager Review | Data Feed | OMR / Exceptions |
| 15 | OMR: Open Calls |  | OPN | Manager Review | Data Feed | OMR / Exceptions |
| 16 | OMR: Short Calls – Outbound |  | OSC | Manager Review | Data Feed | OMR / Exceptions |
| 17 | OMR: Returned MAC Escalation |  | RME | Direct Coach | POC | OMR / Exceptions |
| 18 | OMR: CCO Security and Privacy Incident Coaching |  | SPI | Direct Coach | POC | OMR / Exceptions |
| 19 | OMR: Transfers |  | TRN | Manager Review | Data Feed | OMR / Exceptions |
| 20 | OMR: FFM T2 Transfers |  | TR2 | Manager Review | Data Feed | OMR / Exceptions |

**Database**

Four fields were created which facilitate the workflow and data analysis of the outlier research and coaching process. A rejected table was created to capture records that have LAN IDs (strCSR) that are not found in the hierarchy table. The table below describes the fields:

**New eCL Data Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Field Name** | **Description** | **Data Type** | **Field Options** |
| 1 | strReportCode | * Outlier report code that corresponds to the specific report entered into the eCL (provided on the outlier report feed). | Text (string) | N/A |
| 2 | isCoachingRequired | * When research is required on an outlier item the call center manager must research the item and determine if it needs to be coached or if it is not coachable. | True/False (oolean) | N/A |
| 3 | strReasonNotCoachable | * Short reason for why item was not coachable | Text (string) | Other |
| 4 | txtReasonNotCoachable | * Long reason/explanation/justification as to why the item is not coachable. | Rich Text (XHTML) | N/A |

**Front-end Form**

The table below describes the changes made to the front end form.

eCL Outlier Research and Coaching Process Front-end Form Changes

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **#** | **Form Page** | **Field** | **Conditional Format** | **Display Text** | **Control** | **Option (Value)** |
| 1 | Indirect Entry | strSource | * If strFormType = ‘Indirect’ | N/A | Dropdown Menu | Choices:   * Returned MAC Escalation * Inappropriate DME Escalation * Inappropriate EE/MM Escalation * Low CSAT * Inappropriate NGD Feedback * Inappropriate ACO Escalation * Inappropriate ARC Escalation * CCO Security and Privacy Incident Coaching * LLP |
| Conditions for Review pages | | | | | | |
| 1 | Manager Review | isCoachingRequired | * Show if [strReportCode] is not like ‘LCS’ * Show if [strCoachReason\_ Current\_Coaching\_Initiatives] = ‘Research Required’ * Show only on form view: Manager Review | ‘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.”  Based off of your research does this record require coaching?’ | Radio Button | * Yes(True) * No (False)   Note: the hyperlink points to  [https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx](https://cco.gdit.com/Resources/SOP/Contact%20Center%20Operations/Forms/AllItems.aspx) |
|  |  | isCoachingRequired | * Show if [strReportCode] is like ‘LCS’ * Show if [strCoachReason\_Current\_Coaching\_Initiatives] = ‘Research Required’ * Show only on form view: Manager Review | ‘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.”  Based off of your research does this record require coaching?’ | Radio Button | * Yes(True) * No (False) |
| 2 | Manager Review | strReasonNotCoachable | * Show if [isCoachingRequired] = False * Show only on form view: Manager Review * Dropdown menu * Default value = Other | ‘What was the main reason this item was not coachable?’ | Dropdown Menu | * Other (Other) |
| 3 | Manager Review | txtReasonNotCoachable | * Show if [isCoachingRequired] = False * Show only on form view: Manager Review | ‘Please provide reason / explanation / justification as to why the item was not coachable:’ | Text Box | N/A |
| 4 | Manager Review | txtDescription | * Details for the reason for the coaching (displayed under Coaching Reasons) | “Details of the behavior being coached” | Static TextBox | N/A |
| 5 | Manager Review | txtMgrNotes | * Show if [isCoachingRequired] = True * Show only on form view: Manager Review | ‘Please provide reason / explanation / justification as to why the item is coachable for the Supervisor’ | Text Box | N/A |
| 6 | Manager Review | MgrReviewManualDate | * Show only on form view: Manager Review * Do not allow future dates | ‘Date:’ | Date Picker | N/A |
| 7 | Supervisor Review | txtMgrNotes | * Show if [isCoachingRequired] = True * Show only on form view: Supervisor Review * Read-only | ‘Notes from Manager’ | Text Box | N/A |
| 8 | Supervisor Review | CoachingDate | * Show only on form view: Supervisor   Do not allow future dates | ‘Coaching Date’ | Date Picker | N/A |

Email Notification

If the log is of strSource type OMR and if the EmailSent attribute in the Coaching\_Log table is Null\False, one of the following emails will be sent depending on the strFormStatus (Pending Employee Review, Pending Supervisor Review, Pending Manager Review. After the email is sent, the EmailSentAttribute is set to True.

The email formats for Outlier Pending Review are listed below:

**Manager-Pending Manager Review**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <strong>” & DateTime.Now() for ToString & “</strong> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.   
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png

**Supervisor-Pending Supervisor Review**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered on behalf of ToString & “</strong> on <strong>” & DateTime.Now() that requires your action. Please click on the link below to review the eCoaching log.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.   
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
https://vadenmwbp11.vangent.local/coach/images/BCC-eCL-LOGO-10142011-185x40.png

**Employee-Pending Employee Review**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered on your behalf. Please click on the link below to review and verify the coaching opportunity received on 6/28/2013. Opportunity.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.  
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png

Note: Email should be sent to Employee and copy sent to Supervisor

**Employee-Pending Acknowledge**

**Supervisor-Pending Acknowledge**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and acknowledge the eCL entered on <strong>" & Date & "</strong>" & "Please click on the link below to review the eCoaching log.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.  
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png

**On Form Submit for Review update if**

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Form Page** | **Field** | **Conditional Format** |
| 1 | Manager Review | On Submit | * Set [MgrReviewAutoDate] to current date and time * If [isCoachingRequired] = True then set [strCoachReason\_ Current\_Coaching\_Initiatives] to ‘Opportunity’ * and set [strFormStatus] to ‘Pending Supervisor Review’ * If [isCoachingRequired] = False then set [strCoachReason\_ Current\_Coaching\_Initiatives] to Not Coachable * and set [strFormStatus] to ‘Inactive’ |
| 2 | Supervisor Review | On Submit | * Set [strFormStatus] to ‘Pending Employee Review’ * Set [SupReviewedAutoDate] to current date and time |
| 3 | Employee Review | On Submit | * Set [strFormStatus] to ‘Complete’ * Set [CSRReviewAutoDate] to current date and time |

**Dashboards**

The table below describes the dashboard modifications for outliers.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **#** | **Dashboard** | **Field** | **Conditional Format** | **Display Text** | **Control** | **Option (Value)** |
| 1 | All |  | * If [strFormStatus] = ‘Inactive’ then hide |  |  |  |
| 2 | All as needed | Source |  | • Inbound Short Calls  • Returned MAC Escalation  • Inappropriate DME Escalation  • Inappropriate EE/MM Escalation  • Low CSAT  • Inappropriate NGD Feedback  • Default Qualifiers  • ISG Consults  • Inappropriate ACO Escalation  • Transfers  • Inappropriate ARC Escalation  • Outbound Short Calls  • Cancelled Calls  • Open Calls  • NGD Inappropriate Transfer  • CCO Security and Privacy Incident Coaching  • LLP |  |  |

\*If a record has a strFormStatus of “Inactive”, hide it from all dashboards. eCoaching Logs for employees that have a hierarchy Active status of T or D are set to strFormStatus “Inactive”, immediately after receiving the employee Active status change from Peoplesoft.

File Layout:

A description of the OMR data feed file can be found in the following document: CCO\_eCoaching\_Log\_OMR\_Layout.docx

# IQS (Data Feed)

IQS Lime Survey and Verint are the source systems for quality eCoaching Logs. Some eCoaching Logs will be from Independent Quality Assurance (IQA). A Pending Acknowledgment strFormStatus flow has been added to handle IQS records that have completed coaching outside of the eCL application and only require the Employee and Supervisor to sign off on the acknowledgment portion.

Scorecards from the quality data feed which match an existing record in the system will not be loaded. Matching records are those which have the same Evaluation ID.

The value for Source will identify where the information originated. Source LimeSurvey will identify Written Corr and eMail records entered into Lime Survey. Verint-GDIT identifies records entered into Verint by the GDIT team (contain GDIT in form name). Verint-TQC identify records entered into Verint by the TQC team (contain IQA in form name).

Email Notifications:

The email formats for Quality Pending Review are listed below:

If Customer Service Escalation and Opportunity, Opportunity-PWC or Did not meet goal

**Manager-Pending Manager Review**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <strong>” & DateTime.Now() for ToString & “</strong> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.   
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png

If not Customer Service Escalation and Opportunity, Opportunity-PWC or Did not meet goal

**Supervisor-Pending Supervisor Review**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered on behalf of ToString & “</strong> on <strong>” & DateTime.Now() that requires your action. Please click on the link below to review the eCoaching log.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.   
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
https://vadenmwbp11.vangent.local/coach/images/BCC-eCL-LOGO-10142011-185x40.png

If not Customer Service Escalation and Reinforcement or Met goal (CC email sent to Supervisor)

**Employee-Pending Acknowledge**

**Supervisor-Pending Acknowledge**

\*\* This is an automated email. Do not reply to this email. \*\*

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and acknowledge the eCL entered on <strong>" & Date & "</strong>" & "Please click on the link below to review the eCoaching log.   
  
Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details.  
Form ID:   
  
(Please do not respond to this automated notification)   
  
Thank you,   
eCoaching Log Team   
http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png

eCL IQS Research and Coaching Process



File Layout:

| **Element #** | **Req** | **Field Name** | **Max Length / Field Format** | **Description** |
| --- | --- | --- | --- | --- |
|  | \* | Evaluation ID | 20 bytes, Alpha/Numeric | Evaluation ID is the unique indicator for the scorecard. This should be a natural key back to the source system.  A field was added to the Coaching\_Log table to capture this value:  strIQS\_EvalID nvarchar(20) |
|  | \* | Evaluation Date | 19 bytes, (MM/DD/CCYY HH:MI:SS) | The date and time when the evaluation is created. This will be the system calculated date and local time of the site where the evaluation is first saved.  Cannot be future dated. |
|  | \* | Evaluation Site ID | 3 bytes, Numeric | The site where the scorecard is created. Valid site IDs are:  84 – Chester (Richmond)  33 – Coralville (Iowa City)  85 - Corbin  35 - Phoenix  278 – Tampa  32 - Lawrence  33 – Peckham  279 – London  280 – Bogalusa  281 – Hattiesburg  282 – Houston  283 – Las Cruces  284 – Lynn Haven  285 – Sandy  290 – Waco  291 – Winchester  A field was added to the Coaching\_Log table to capture this value:  numIQS\_EvalSiteID int |
|  | \* | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the Employee |
|  | \* | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the Employee |
|  | \* | Supervisor Emp ID | 20 bytes, Alpha/Numeric | Supervisor’s Employee Ide CSR’s sentuator IDcard as an opportunity or reinforcement |
|  | \* | Supervisor Emp ID | 20 bytes, Alpha/Numeric | Supervisor’s Employee Ide CSR’s sentuator IDcard as an opportunity or reinforcement |
|  | \* | Manager Emp ID | 20 bytes, Alpha/Numeric | Manager’s Employee ID |
|  | \* | Manager Emp ID | 20 bytes, Alpha/Numeric | Manager’s Employee ID |
|  |  | Journal File Number | 30 bytes, Alpha/Numeric | An ID associated to the original voice and data recordings referring to the number assigned to the call. (Note this is not the Token)  Typically this is the Mattersite ID from Lime Survey.  Cannot be Null, Blank or NA for PpoM and QCM but can be blank otherwise. |
|  | \* | Call Date / Time | 19 bytes. (MM/DD/CCYY HH:MI:SS) | System generated date/time of the call for evaluations with valid call content. If there is no valid call content this field will be populated with the current date generated when the query is run. |
|  | \* | BLANK | 19 bytes. (MM/DD/CCYY HH:MI:SS) | Previously Coaching Date |
|  | \* | Summary of Caller’s Issues  **PLUS**  Coaching/Goal Discussion | 6150 bytes, Alpha/Numeric Non-alphanumeric characters are removed. | Reason why the Beneficiary called.  This goes into Details of Behavior being Coached in the front end.  **PLUS**  Notes for coaching discussions with the Employee.  From “Summary of Coaching Priorities” comment field on the form.  NA will be populated in this field if not populated by the user.  An appealed record will be identified by an “A-“ appended at the beginning of any text in this field.  These 2 sections will be separated in the feed by:  **<Carriage Return>**  **COACHING NOTES**  Note: When IQS feeds are received, containing updated logs that are still Open in our system, this field will be updated to match the newest feed. |
|  | \* | Blank | 4000 bytes, Alpha/Numeric Non-alphanumeric characters are removed. | Formerly Coaching/Goal Discussion:  Notes for coaching discussions with the Employee.  From “Summary of Coaching Priorities” comment field on the form.  NA will be populated in this field if not populated by the user.  An appealed record will be identified by an “A-“ appended at the beginning of any text in this field. |
|  |  | Customer Service Assessment Critical Error | 2 bytes, Alpha/Numeric | Critical Error code for Customer Service Assessment or Writing Skills Assessment.  Valid QCM values: 1, 2, 3, 4, 5, 6, 7, 8, or Blank (for NA).  Default value: Blank |
|  | \* | Evaluator ID | 20 bytes, Alpha/Numeric | The User ID of the person who created the evaluation. This is mapped to **Submitter** in eCL. |
|  |  | Blank | 25 bytes, Alpha/Numeric | Formerly Coached by Name: name of the person performing the coaching |
|  | \* | Blank | 20 bytes, Alpha/Numeric | Formerly Coacher Emp ID:User ID of the person who performed the coaching.  Will cross match to confirm the ID exists in the Person table. |
|  | \* | Source | 30 bytes, Alpha/Numeric | The Source of the eCoaching log information  Valid values:  Verint-GDIT  Verint-TQC  LimeSurvey |
|  | \* | Blank | 10 bytes, Alpha/Numeric | Formerly CSR Signature: Emp ID of the Employee being coached.  Will contain ‘XXXXX’ if the Employee has refused to sign.  Will cross match to confirm the ID exists in the Person table. |
|  | \* | Opportunity / Reinforcement | 17 bytes, Alpha/Numeric | Value calculated from the section overall scores within the scorecards.  Valid values:  Opportunity  Reinforcement  Opportunity-PWC  Met goal  Did not meet goal  Note: When IQS feeds are received, containing updated logs that are still Open in our system, this field (strCoachReason\_Quality) will be updated to match the newest feed. |
|  |  | Program | 3 bytes, Alpha/Numeric | Identifies where the items is Marketplace or Medicare.  Values are:  Yes = Marketplace  No = Medicare |
|  |  | Evalutaion Form | 50 bytes, Alpha/Numeric | For records from Verint = scorecard form used  For records from Lime Survey = channel |

**\*** Cannot be Null, Blank or NA

Sample IQS Feed:

15699|08/13/2013 22:44:03|35|221199|221199|413599|413599|403099|403099|74169990|08/05/2013 13:44:00||Phone – Beneficiary is calling to verify if Medicare covers dental services. |Excellent job John.|||||Verint-GDIT||reinforcement|Yes|GDIT QCM Medicare

Peoplesoft Feed:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| lanid | emplid | first\_name | middle\_name | last\_name |
| First.Last | W999999 | First | M | Last |
|  |  |  |  |  |
| locationid | location |  | supervisorid | managerid |
| WMS23 | MS-Hattiesburg-5912 Highway 49 |  | W111111 | W222222 |
|  |  |  |  |  |
| jobcodeid | jobcode | email\_addr | empl\_status |  |
| WACS01 | Assoc Specialist, Cust Svc | [First.Last@GDIT.com](mailto:First.Last@GDIT.com) | T |  |

# Other System Attributes



****

## Historical Reporting Access Controls



# Method for Change Management

This document will be stored in SharePoint. It’s minor version number will be updated when changes are made.

# eCoaching Modules

Allow for the selection of the type of eCoaching Log to be entered and submitted.

**1.0 eCoaching Presentation Requirements**

1.1 Presentation of eCoaching pages

The font use for the page should be ????

Questions should be bold.

There should be a line displayed after the Select Coaching Module list.

“Please do NOT include PII or PHI in the log entry.” note should be displayed in red text before the 1st question after selecting the module.

Display remaining questions only after question 6 (“Will you be delivering the caching session?”) has been answered.

A summary section will be displayed to left of the coaching questions. It will contain the status, started date, selected employee, supervisor, manager. For CSR Coaching module, site may also be displayed.

The background color of the summary section will be Red: 157; Green: 206; Blue: 255.

Status displayed while entering coaching information shall be New, following by the selected module (CSR Coaching, Supervisor Coaching, Quality Specialist Coaching).

**2.0 eCoaching Log Modules**

2.1 Customer Service Representative (CSR)

2.1.1 Submission of eCoaching Logs

Submission of eCoaching Logs for CSR is defined in sections I through IV above.

2.1.1.1 No log to self

Submitters of logs will not be available for selection from the list of CSRs.

2.1.1.2 Direct Warning Reason and Sub-Reasons

Allow for the selection of a single Direct Warning Reason and Sub-Warning Reason.

2.1.1.3 No Duplicate Warnings

Do now allow duplicate warnings to be submitted.

2.1.1.2.1 Duplicate Warnings

Duplicate Warnings are defined as logs with the same:

Employee ID

Warning Given Date

Warning Type (Coaching Reason)

Warning Reason (Sub-coaching Reason)

Also, the log must be Active and have a Status of Complete

2.1.1.2.2 Duplicate Error

Display the following error message if a duplicate warning log is found:

“A warning with the same category and type already exists. Please review your warning section in the My Dashboard for details.”

2.1.2 Notification of eCoaching Logs

Notification of eCoaching Logs for CSR is defined in sections V above.

2.1.3 Outlier Data Feed (OMR)

Outlier Data Feed for CSRs is defined in section VI above.

2.1.4 Quality Data Feed (IQS)

Quality Data Feed for CSRs is defined in in section VII above.

2.1.5 Electronic Timecard System Data Feed (ETS)

ETS Data Feed allows for the creation of eCoaching logs for Employees and Supervisors who committed a timekeeping infraction such as using an incorrect charge code.

2.1.5.1 ETS Reports

The following reports will be generated by Time Card Administrators:

Excused Absence

Incorrect Holiday

Invalid Timecodes Direct

Invalid Timecodes Indirect

Future Hours Worked

Outstanding Action (Employee)

2.1.5.1.1 ETS Feed File Layout

CCO\_eCoaching\_Log\_ETS\_Layout.docx identifies the fields and layout of each report. The report files will be a comma separated value (CSV) file.

2.1.5.1.2 Location

Each report will placed in the following location to be processed:

[\\vrivscors01\BCC Scorecards\Coaching\ETS\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\ETS\)

2.1.5.1.3 Naming Convention

Each report (EA, HOL, ITD, ITI, FWH) shall have the following file naming convention:

eCl\_ETS\_Feed\_XXX(X)yyyymmdd.csv

Report OAE shall have the following file naming convention:

eCl\_Compliance\_ETS\_Feed\_XXX(X)yyyymmdd.csv

where XXX(X) is the 3 or 4 letter Report Code for the individual report

and yyyymmdd is the date the file generated in year month day format.

2.1.5.1.4 Report Codes

The Report Codes for the Employee reports shall be:

EA – Excused absence, paid leave

HOL –Holiday hours

ITD – Invalid Timecodes – Direct

ITI – Invalid Timecodes – Paid leave

FWH – Future hours

OAE – Outstanding Action (Employee)

2.1.5.1.5 Invalid Records Not Processed

Records from the feed file which cannot be processed will be identified.

2.1.5.2 eCoaching Logs

The eCoaching Log will be initiated in the CSR module when the Employee in the feed file has a job code of WACS01, WACS02, WACS03. If the Employee in the feed file has a job code of WACS40 the eCoaching Log will be initiated in the Supervisor module.

2.1.5.2.1 Program

The Program shall be determined based on the value in the employee hierarchy record.

2.1.5.2.2 Delivery Option

The Delivery Option shall be considered to be Indirect.

2.1.5.2.3 Date of Coaching

The date of coaching or event will be the Friday End Date in the feed file. For Outstanding Action (Employee) report, the date of coaching or event will be the Time Period.

2.1.5.2.4 Coaching Reasons

The Coaching Reasons shall be as follows:

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| ETS | Opportunity | Excused absence, paid leave  Holiday hours  Invalid time code – Direct  Invalid time code – Paid leave  Future hours |
| ETS | Research Required | Outstanding Action (Employee) |

2.1.5.2.5 Report Details

The Report Details shall be the following fields from the feed file concatenated together, delimited by the pipe or vertical bar character (|):

For report codes EOT, EA, HOL, ITD, ITI, FWH

Friday End Date

Project Number

Task Number

Task Name

Time Code

Supervisor Name (only from non-approver reports)

Hours

Sat

Sun

Mon

Tues

Wed

Thurs

Fri

For report code OAE

Time Period

Employee Name

2.1.5.2.6 Identify Source for eCoaching Log

The source of the coaching log shall be ETS.

2.1.5.3 Notification of eCoaching Logs

Email notifications for ETS data feed eCoaching Logs from report codes EOT, EA, HOL, ITD, ITI, FWH shall follow the same form as those submitted though the user interface as Pending Supervisor Review. The current employee hierarchy will be used to determine the employee’s supervisor and manager.

2.1.5.3.1 Notification for Outstanding Action

The eCoaching Log email format will follow the same format as all other eCoaching email notifications.

2.1.5.3.1.1 Pending Supervisor Review

When an eCoaching Log is submitted for an OAE report item, the status is Pending Supervisor Review, the Supervisor receives a system generated eMail notification.

Subject:

eCL: Pending Supervisor Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <DATE> for <EMPLOYEE NAME> is a valid timecard infraction. Further directions are provided on the form.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.1.5.4 Description Text

The description text displayed will be different for each report or type of infraction.

2.1.5.4.1 Excused absence, paid leave Description Text

Include the following text in the description for Excused absence, paid leave eCoaching Log:

The employee recorded incorrect Excused Absence hours. All paid leave (General Leave or floating Holiday time) must be exhausted before using Excused Absence 080984 | 3517. Excused Absence cannot be taken for full days of leave and you must have some worked hours recorded for the days this project | task code is used. Exempt employees absent for a full day must use LWOP 080984 | 9005.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.1.5.4.2 Holiday hours Description Text

Include the following text in the description for Holiday hours eCoaching Log:

The non-exempt employee recorded incorrect hours on a holiday or recorded holiday hours on an incorrect day.

As a reminder, per HR-POL-203 Holidays, for employees with GSA administered benefits:

Holiday can only be recorded on the day it is observed.

To receive holiday pay, other paid hours must be recorded in the week in which a holiday is observed.

If an employee works on the observed holiday, holiday and time worked would be recorded.

If the observed holiday falls on an employee’s scheduled day-off, only holiday hours would be recorded.

Leave time cannot be recorded on a day in which a holiday is recorded.

Shift and bilingual premiums do not apply to holiday hours.

When an employee takes a fixed holiday off, the time must be charged in a whole-day increment to holiday, regardless of the total number of hours worked in the particular pay period.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.1.5.4.3 Invalid time code – Direct Description Text

Include the following text in the description for Invalid time code – Direct eCoaching Log:

The employee recorded worked hours with a time code that is not valid in the CCO program. Please see your supervisor for a list of valid time codes used in the CCO.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.1.5.4.4 Invalid time code – Paid leave Description Text

Include the following text in the description for Invalid time code – Paid leave eCoaching Log:

The employee recorded paid leave with an invalid time code.  Paid leave is not eligible for shift or bilingual premium.  All paid leave must be recorded with time code of 01 or \*.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.1.5.4.5 Future hours Description Text

Include the following text in the description for Future hours eCoaching Log:

The employee has entered worked hours in advance.  The only circumstances in which worked hours should be entered in advance are:

When the employee’s Friday shift doesn’t start until after the stated deadline for them to sign their timecard or

When the employee is working off-site or traveling and will not have access to ETS.

If this employee doesn’t fall under one of these situations please coach them and have them remove the future worked hours from their timecard.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.1.5.4.6 Outstanding Action (Employee) Description Text

Include the following text in the description for Outstanding Action (Employee) eCoaching Log:

The employee either did not sign his or her timecard by the Friday deadline for the period below, or it was signed with errors and rejected. Please review and take action as necessary.

The time period and employee name are below:

<Report Details – pipe delimited fields from report>

2.1.5.5 Supervisor Review

The format of the review page for an Outstanding Action (Employee) eCoaching Log shall be similar to the Manager review page of an OMR log except that the following test will be displayed instead of the OMR text:

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 Contact Center Operations 3.06 Timecard Audit SOP and provide the details in the record below.

2.1.5.5.1 Link to SOP

The following is the hyper link to the appropriate Standard Operating Procedure:

[https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx](https://cco.gdit.com/Resources/SOP/Contact%20Center%20Operations/Forms/AllItems.aspx)

2.1.5.5.2 Date

Enter or select the date of coaching (if coaching required) or date of review (if coaching not required) – cannot be a future date.

2.1.5.5.3 Is Coaching Required

Determine if the infraction requires coaching.

2.1.5.5.3.1 Yes Requires Coaching Fields

If Yes requires coaching selected, display and accept data entry for the following:

Provide the details from the coaching session including action plans developed:

– text field allowing up to 3000 characters

Value of coaching reason/sub-reason becomes Opportunity

Status of coaching log becomes Pending Employee Review

2.1.5.5.3.2 Does Not Require Coaching Fields

If No does not require coaching selected, display and accept data entry for the following:

What is the main reason this item was not coachable?

– drop down list with Other as an option to select

Please provide reason / explanation / justification as to why the item was not coachable:

– text field allowing up to 3000 characters

Value of coaching reason/sub-reason becomes Not Coachable

Status of coaching log becomes Inactive

2.2 Supervisor

2.2.1 Submission of eCoaching Logs

eCoaching Logs will be submitted for Supervisors.

2.2.1.1 Display Supervisors

Display a list of Supervisors regardless of site or location that have the following job codes: WACS40.

2.2.1.2 Program

Allow for selection of Program – Marketplace, Medicare or NA.

2.2.1.3 Delivery Option

The delivery options will be:

Yes, I will be delivering the coaching session (also known as Direct)

No, I will not be delivering the coaching session (also known as Indirect)

2.2.1.4 Date of Coaching

2.2.1.4.1 Date of Coaching

Allow for entry of the date of coaching when coaching is direct.

2.2.1.4.2 Date of Event

Allow for entry of the date of the event when coaching is indirect.

2.2.1.4.3 Date Warning Given

Allow for entry of the date warning given when coaching is direct and Yes is selected for Progressive Disciplinary Warning.

2.2.1.5 Customer Service Escalation

Determine if coaching or event is a CSE.

Note: only CSE related Coaching Reasons will be available if Yes selected.

2.2.1.6 Coaching Reasons and Sub-Coaching Reasons

Allow for the selection of one or more the following Coaching Reasons and Sub-Coaching Reasons

2.2.1.6.1 Direct Coaching Reason and Sub-Reasons

Allow for the selection of one or more Direct Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| AHT | Opportunity or Reinforcement | Keeping the call on task  Navigational efficiency  Non transfer opportunity  Over servicing the caller  Utilizing appropriate scripting  Other: Specify reason under coaching details. |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| CCO Processes and Procedures | Opportunity or Reinforcement | CCO Learning CUP Desk to Desk Security and Privacy Incident  Other: Specify reason under coaching details. |
| Coaching | Opportunity or Reinforcement | Quality eCL Coaching Supervisor eCL Coaching  Other: Specify reason under coaching details. |
| Corporate and Program Compliance | Opportunity or Reinforcement | Annual Review CoR eRes IPC ISO Mandatory Training  Secure Floor Policy Other: Specify reason under coaching details. |
| ETS | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| KUDOS | Reinforcement | Other: Specify reason under coaching details. |
| Professional Development | Opportunity or Reinforcement | Business Acumen Critical Thinking IDP Leadership Skills Other: Specify reason under coaching details. |
| Quality Performance | Opportunity or Reinforcement | Customer Satisfaction PPoM  Verint  Other: Specify reason under coaching details. |
| Reports Catalogue | Opportunity or Reinforcement | Incorrect Escalation: ARC Incorrect Escalation: DMEPOS Incorrect Escalation: EE / MM Incorrect Escalation: RME Incorrect Transfers ISG Usage OMR: Default Qualifier OMR: Short Calls Inbound  OMR: Short Calls Outbound OMR: Cancelled Calls OMR: Open Calls Other: Specify reason under coaching details. |
| Schedule Adherence | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Customer Service Escalation (available only if the log is a CSE) | Opportunity | Argues  Blind transfers call  Encourages / commits fraud  Intentionally disconnects caller  Threatens caller / employee  Uses derogatory/disrespectful words  Uses profanity of any kind  Verbally abusive  Yells, screams  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.2.1.6.2 Indirect Coaching Reason and Sub-Reasons

Allow for the selection of one or more Indirect Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| AHT | Opportunity or Reinforcement | Keeping the call on task  Navigational efficiency  Non transfer opportunity  Over servicing the caller  Utilizing appropriate scripting  Other: Specify reason under coaching details. |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| CCO Processes and Procedures | Opportunity or Reinforcement | CCO Learning CUP Desk to Desk Security and Privacy Incident  Other: Specify reason under coaching details. |
| Coaching | Opportunity or Reinforcement | Quality eCL Coaching Supervisor eCL Coaching  Other: Specify reason under coaching details. |
| Corporate and Program Compliance | Opportunity or Reinforcement | Annual Review CoR eRes IPC ISO Mandatory Training  Secure Floor Policy Other: Specify reason under coaching details. |
| ETS | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| KUDOS | Reinforcement | Other: Specify reason under coaching details. |
| Professional Development | Opportunity or Reinforcement | Business Acumen Critical Thinking IDP Leadership Skills Other: Specify reason under coaching details. |
| Quality Performance | Opportunity or Reinforcement | Customer Satisfaction PPoM  Verint  Other: Specify reason under coaching details. |
| Reports Catalogue | Opportunity or Reinforcement | Incorrect Escalation: ARC Incorrect Escalation: DMEPOS Incorrect Escalation: EE / MM Incorrect Escalation: RME Incorrect Transfers ISG Usage OMR: Default Qualifier OMR: Short Calls Inbound  OMR: Short Calls Outbound OMR: Cancelled Calls OMR: Open Calls Other: Specify reason under coaching details. |
| Schedule Adherence | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Customer Service Escalation (available only if the log is a CSE) | Opportunity | Argues  Blind transfers call  Encourages / commits fraud  Intentionally disconnects caller  Threatens caller / employee  Uses derogatory/disrespectful words  Uses profanity of any kind  Verbally abusive  Yells, screams  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.2.1.6.3 Direct Warning Reason and Sub-Reasons

Allow for the selection of a single Direct Warning Reason and Sub-Warning Reason.

|  |  |  |
| --- | --- | --- |
| Warning Reason | Opportunity/Reinforcement | Sub-Warning Reason |
| Verbal Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

Note: Other Policy (non-Security/Privacy) should be last in the list.

2.2.1.7 Coaching Details

When coaching is Direct or Indirect and CSE or non-CSE, provide details of behavior to be coached.

Note: not available if Yes is selected for Progressive Disciplinary Warning.

2.2.1.8 Coaching Session Details

When coaching is Direct, CSE or non-CSE, provide the details from the coaching session including action plans developed.

Note: not available if Yes is selected for Progressive Disciplinary Warning.

2.2.1.9 Identify Source for eCoaching Log

Allow for the following selection of how the coaching opportunity was identified.

CSR Reported Issue

DMEPOS Escalations

Internal CCO Reporting

Training and Development

Walk By

Note: not available for selection if Yes is selected for Progressive Disciplinary Warning, but should default to Warning.

2.2.1.10 Associated with a Call Record

If the coaching log is associated with a Call Record, allow for the entry of call record source and corresponding valid identifier. Available sources are (in display order):

Verint – valid id is numeric, 10 or 19 digits

NGD ID – valid id is any letter or number with a dash, 9 or 16 characters

Avoke – valid id is any letter or number with an underscore, 24 characters

UCID – valid id is any letter or number, 26 characters

Note: not available if Yes is selected for Progressive Disciplinary Warning.

2.2.1.11 Verification

Submitter must verify that all the information on the form is true and complete to the best of their knowledge.

Note: not available if Yes is selected for Progressive Disciplinary Warning.

2.2.1.12 Required entry fields

The following fields are required (when displayed) for submission of eCoaching Logs:

eCoaching Module

Supervisor Name

Program

Delivery Option

Date of coaching, event, or warning given

Progressive Disciplinary Warnings

Customer Service Escalation

Coaching or Warning Reason, Opportunity or Reinforcement, Sub-Coaching/Warning Reason

Details of the behavior to be coached

If Direct coaching then detail from coaching session is required

How coaching was identified

Call record associated

If yes call record, then type and valid identifier are required

Verification

2.2.1.13 Access to submission

Employees with the following job codes will have access and ability to submit eCoaching Logs for Supervisors:

Supervisor / Other – WACS40, WFFA40, WISY13, WMPR40, WPPM11, WPPT40, WPSM11, WPSM12, WPSM13, WPSM14, WPSM15, WTTI02. WTTR12, WTTR40, WPOP11, WPPM12

Manager – WACS50, WBCO50, WFFA50, WMPR50, WPOP50, WPPM50, WPPT50, WTTR50

Sr. Manager – WACS60, WBCO70, WEEX90, WEEX91, WPOP60, WPPM60, WPPM70, WPPM80, WPPT60, WPWL51

Others:

WISO13 – Software Engineer

WISY13 – Systems Analyst

WSTE13 – Testing Engineer

2.2.1.14 Progressive Disciplinary Warnings

Determine if coaching log is for progressive disciplinary warning. Select Yes or No to “Do you need to submit a progressive disciplinary action (WARNING)?”

Note: Not available if the submitter is not the Employee’s immediate Supervisor or Manager as defined in the Employee Hierarchy or if coaching is Indirect (No, I will not be delivering the coaching session.)

2.2.1.15 No log to self

Submitters of logs will not be available for selection from the list of supervisors.

2.2.1.16 No Duplicate Warnings

Do now allow duplicate warnings to be submitted.

2.2.1.16.1 Duplicate Warnings

Duplicate Warnings are defined as logs with the same:

Employee ID

Warning Given Date

Warning Type (Coaching Reason)

Warning Reason (Sub-coaching Reason)

Also, the log must be Active and have a Status of Complete

2.2.1.16.2 Duplicate Error

Display the following error message if a duplicate warning log is found:

“A warning with the same category and type already exists. Please review your warning section in the My Dashboard for details.”

2.2.2 Notification of eCoaching Logs

A system generated eMail notification is sent to the appropriate party when an eCoaching Log is submitted.

2.2.2.1 eCoaching Log eMail Format

The following is the basic form of the eCoaching Log eMail notification. The subject and message will change depending on certain criteria.

|  |
| --- |
| To – [to] |
| Subject – [Subject] |
| \*\* This is an automated email. Do not reply to this email. \*\*   [Message]  Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details. [Link to Dashboard]  Form ID: [FormID]  (Please do not respond to this automated notification)  Thank you, eCoaching Log Team http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png |

2.2.2.2 Pending Employee Review

When an eCoaching Log is submitted and the coaching is Direct and is not a Customer Service Escalation and the status is Pending Employee Review, the Employee (Supervisor) receives a system generated eMail notification.

Subject:

eCL: Pending Employee Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered on your behalf. Please click on the link below to review and verify the coaching opportunity received on <**DATE**>.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.2.2.3 Pending Manager Review

When an eCoaching Log is submitted and the coaching is Indirect and is not a Customer Service Escalation and the status is Pending Manager Review, the immediate Manager of the Employee (Supervisor) receives a system generated eMail notification.

Subject:

eCL: Pending Manager Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered on behalf of <**EMPLOYEE NAME**> on <**DATE**> that requires your action. Please click on the link below to review the eCoaching log.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.2.2.4 Pending Sr. Manager Review

When an eCoaching Log is submitted and the coaching is Direct and is a Customer Service Escalation and the status is Pending Sr. Manager Review, the immediate Sr. Manager of the Employee (Supervisor) receives a system generated eMail notification.

Subject:

eCL: Pending Sr. Manager Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <**DATE** > for <**EMPLOYEE NAME**> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.2.2.5 Pending Sr. Manager Review

When an eCoaching Log is submitted and the coaching is Indirect and is a Customer Service Escalation and the status is Pending Sr. Manager Review, the immediate Sr. Manager of the Employee (Supervisor) receives a system generated eMail notification.

Subject:

eCL: Pending Sr. Manager Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <**DATE** > for <**EMPLOYEE NAME**> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.2.2.6 Progressive Disciplinary Warnings

No email notification is sent for Progressive Disciplinary eCoaching Logs

2.2.3 Outlier Data Feed (OMR)

Outlier Data Feed for Supervisors is not defined.

2.2.4 Quality Data Feed (IQS)

Quality Data Feed for Supervisors is not defined.

2.2.5 Electronic Timecard System Data Feed (ETS)

ETS Data Feed allows for the creation of eCoaching logs for Supervisors who committed a timekeeping infraction such as using an incorrect charge code or who approved a time card of a direct report which contained a timekeeping infraction.

2.2.5.1 ETS Reports

The following reports will be generated by Time Card Administrators for supervisors who committed infractions:

Exempt Over Time

Excused Absence

Incorrect Holiday (Approver)

Invalid Timecodes Direct (Approver)

Invalid Timecodes Indirect (Approver)

Future Hours Worked (Approver)

Outstanding Acton (Employee)

Outstanding Acton (Supervisor)

2.2.5.1.1 ETS Feed File Layout

CCO\_eCoaching\_Log\_ETS\_Layout.docx identifies the fields and layout of each report. The report files will be a comma separated value (CSV) file.

2.2.5.1.2 Location

Each report will placed in the following location to be processed:

[\\vrivscors01\BCC Scorecards\Coaching\ETS\](file:///\\vrivscors01\BCC%20Scorecards\Coaching\ETS\)

2.2.5.1.3 Naming Convention

Each report (EOT, EA, HOLA, ITDA, ITIA, FWHA) shall have the following file naming convention:

eCl\_ETS\_Feed\_XXX(X)yyyymmdd.csv

Reports OAE and OAS shall have the following file naming convention:

eCl\_Compliance\_ETS\_Feed\_XXX(X)yyyymmdd.csv

where XXX(X) is the 3 or 4 letter Report Code for the individual report

and yyyymmdd is the date the file generated in year month day format.

2.2.5.1.4 Report Codes

The Report Codes for the Supervisor reports shall be:

EOT – Exempt OT hrs

EA – Excused absence, paid leave

HOLA – Holiday hours (Approver)

ITDA – Invalid Timecodes – Direct (Approver)

ITIA – Invalid Timecodes – Paid leave (Approver)

FWHA – Future hours (Approver)

OAE – Outstanding Action (Employee)

OAS – Outstanding Action (Supervisor)

2.2.5.1.5 Invalid Records Not Processed

Records from the feed file which cannot be processed will be identified.

2.2.5.2 eCoaching Logs

The eCoaching Log will be initiated in the CSR module when the Employee in the feed file has a job code of WACS01, WACS02, WACS03. If the Employee in the feed file has a job code of WACS40 the eCoaching Log will be initiated in the Supervisor module. Note: only Supervisors are expected to be in the Approver and OAS reports.

2.2.5.2.1 Program

The Program shall be determined based on the value in the employee hierarchy record.

2.2.5.2.2 Delivery Option

The Delivery Option shall be considered to be Indirect.

2.2.5.2.3 Date of Coaching

The date of coaching or event will be the Friday End Date in the feed file. For Outstanding Action (Employee) and Outstanding Action (Supervisor) reports, the date of coaching or event will be the Time Period.

2.2.5.2.4 Coaching Reasons

The Coaching Reasons shall be as follows:

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| ETS | Opportunity | Exempt OT hrs  Excused absence, paid leave  Holiday hours (Approver)  Invalid time code – Direct (Approver)  Invalid time code – Paid leave (Approver)  Future hours (Approver) |
| ETS | Research Required | Outstanding Action (Employee)  Outstanding Action (Supervisor) |

2.2.5.2.5 Report Details

The Report Details shall be the following fields from the feed file concatenated together, delimited by the pipe or vertical bar character (|):

For report codes EOT, EA, HOLA, ITDA, ITIA, FWHA

Friday End Date

Project Number

Task Number

Task Name

Time Code

Name of CSR Whose Timecard Contained the Error (only from the Approver reports)

Hours

Sat

Sun

Mon

Tues

Wed

Thurs

Fri

For report codes OAE, OAS

Time Period

Employee Name

Associated Person (only for the OAS report)

2.2.5.2.6 Identify Source for eCoaching Log

The source of the coaching log shall be ETS.

2.2.5.3 Notification of eCoaching Logs

Email notifications for ETS eCoaching Logs from report codes EOT, EA, HOLA, ITDA, ITIA, FWHA shall follow the same form as those submitted though the user interface as Pending Manager Review. The current employee hierarchy will be used to determine the employee’s supervisor and manager.

2.2.5.3.1 Notification for Outstanding Action

The eCoaching Log email format will follow the same format as all other eCoaching email notifications.

2.2.5.3.1.1 Pending Manager Review

When an eCoaching Log is submitted for an OAE or OAS report item, the status is Pending Manager Review, the Manager receives a system generated eMail notification.

Subject:

eCL: Pending Manager Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <DATE> for <EMPLOYEE NAME> is a valid timecard infraction. Further directions are provided on the form.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.2.5.4 Description Text

The description text displayed will be different for each report or type of infraction.

2.2.5.4.1 Exempt OT hrs Description Text

Include the following text in the description for Exempt OT hrs eCoaching Log:

The exempt employee incorrectly recorded overtime hours. Exempt employees are expected to occasionally exceed the standard workweek (Saturday through Friday) as assigned tasks may demand. In most cases such work, which exceeds the standard workweek, is not eligible for additional pay and should be recorded as straight time.  CCO exempt employees should not charge overtime without direction from CCO Communications.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.2 Excused absence, paid leave Description Text

Include the following text in the description for Excused absence, paid leave eCoaching Log:

The employee recorded incorrect Excused Absence hours. All paid leave (General Leave or floating Holiday time) must be exhausted before using Excused Absence 080984 | 3517. Excused Absence cannot be taken for full days of leave and you must have some worked hours recorded for the days this project | task code is used. Exempt employees absent for a full day must use LWOP 080984 | 9005.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.3 Holiday hours (Approver) Description Text

Include the following text in the description for Holiday hours Approver eCoaching Log:

A timecard was approved with incorrect hours recorded on a holiday or holiday hours recorded on an incorrect day.

As a reminder, per HR-POL-203 Holidays, for employees with GSA administered benefits:

Holiday can only be recorded on the day it is observed.

To receive holiday pay, other paid hours must be recorded in the week in which a holiday is observed.

If an employee works on the observed holiday, holiday and time worked would be recorded.

If the observed holiday falls on an employee’s scheduled day-off, only holiday hours would be recorded.

Leave time cannot be recorded on a day in which a holiday is recorded.

Shift and bilingual premiums do not apply to holiday hours.

When an employee takes a fixed holiday off, the time must be charged in a whole-day increment to holiday, regardless of the total number of hours worked in the particular pay period.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.4 Invalid time code – Direct (Approver) Description Text

Include the following text in the description for Invalid time code – Direct Approver eCoaching Log:

The employee approved a timecard with a time code that is not valid in the CCO program.  The list of valid time codes can be found in the Common\_CCO\_Time\_Codes document on CCO Knowledge Net under the timekeeping category.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.5 Invalid time code – Paid leave (Approver) Description Text

Include the following text in the description for Invalid time code – Paid leave Approver eCoaching Log:

The employee approved a timecard that had paid leave with and invalid time code. Paid leave is not eligible for shift or bilingual premium.  All paid leave must be recorded with time code of 01 or \*.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.6 Future hours (Approver) Description Text

Include the following text in the description for Future hours Approver eCoaching Log:

The employee has approved a timecard with worked hours entered in advance.  The only circumstances in which worked hours should be entered in advance are:

When the employee’s Friday shift doesn’t start until after the stated deadline for them to approve timecards or

When the employee is working off-site or traveling and will not have access to ETS for approvals.

If this employee doesn’t fall under one of these situations please coach them and have them remove the future worked hours from their timecard.

The date, project and task numbers, time code, total and daily hours are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.7 Outstanding Action (Employee) Description Text

Include the following text in the description for Outstanding Action (Employee) eCoaching Log:

The employee either did not sign his or her timecard by the Friday deadline for the period below, or it was signed with errors and rejected. Please review and take action as necessary.

The time period and employee name are below:

<Report Details – pipe delimited fields from report>

2.2.5.4.8 Outstanding Action (Supervisor) Description Text

Include the following text in the description for Outstanding Action (Supervisor) eCoaching Log:

It appears the supervisor may have missed the deadline to approve this timecard. Please research and coach as necessary.

The time period, manager name, and name of employee whose timecard requires action are below:

<Report Details – pipe delimited fields from report>

2.2.5.5 Manager Review

The format of the review page for an Outstanding Action (Employee) and Outstanding Action (Supervisor) eCoaching Logs shall be similar to the Manager review page of an OMR logs except that the following test will be displayed instead of the OMR text:

2.2.5.5.1 Manager Review 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 Contact Center Operations 3.06 Timecard Audit SOP and provide the details in the record below.

2.2.5.5.2 Manager Review 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 Contact Center Operations 3.06 Timecard Audit SOP and provide the details in the record below.

2.2.5.5.3 Link to SOP

The following is the hyper link to the appropriate Standard Operating Procedure:

[https://cco.gdit.com/Resources/SOP/Contact Center Operations/Forms/AllItems.aspx](https://cco.gdit.com/Resources/SOP/Contact%20Center%20Operations/Forms/AllItems.aspx)

2.2.5.5.4 Date

Enter or select the date of coaching (if coaching required) or date of review (if coaching not required) – cannot be a future date.

2.2.5.5.5 Is Coaching Required

Determine if the infraction requires coaching.

2.2.5.5.5.1 Yes Requires Coaching Fields

If Yes requires coaching selected, display and accept data entry for the following:

Provide the details from the coaching session including action plans developed:

– text field allowing up to 3000 characters

Value of coaching reason/sub-reason becomes Opportunity

Status of coaching log becomes Pending Employee Review

2.2.5.5.5.2 Does Not Require Coaching Fields

If No does not require coaching selected, display and accept data entry for the following:

What is the main reason this item was not coachable?

– drop down list with Other as an option to select

Please provide reason / explanation / justification as to why the item was not coachable:

– text field allowing up to 3000 characters

Value of coaching reason/sub-reason becomes Not Coachable

Status of coaching log becomes Inactive

2.3 Quality Specialist

2.3.1 Submission of eCoaching Logs

eCoaching Logs will be submitted for Quality Specialists.

2.3.1.1 Display Quality Specialists

Display a list of Quality Specialist regardless of site or location that have the following job codes: WACQ02, WACQ03, WACQ12.

2.3.1.2 Program

Allow for selection of Program – Marketplace, Medicare or NA.

2.3.1.3 Delivery Option

The delivery options will be:

Yes, I will be delivering the coaching session (also known as Direct)

No, I will not be delivering the coaching session (also known as Indirect)

2.3.1.4 Date of Coaching

Allow for entry of the date of coaching or event.

2.3.1.5 Customer Service Escalation

Not available at this time.

2.3.1.6 Coaching Reasons and Sub-Coaching Reasons

Allow for the selection of one or more the following Coaching Reasons and Sub-Coaching Reasons

2.3.1.6.1 Direct Coaching Reason and Sub-Reasons

Allow for the selection of one or more Direct Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| ATA Alignment | Opportunity or Reinforcement | Administrative Procedures  Agent Responsiveness  Closing QA Team Notes  Conversation Management  Disclosure  Opening  Professional Etiquette  Program Knowledge  Reasons for Call  Other: Specify reason under coaching details. |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Call Quality | Opportunity or Reinforcement | Call Listening Completions  Special Assignment Completions  Other: Specify reason under coaching details. |
| Corporate / Program Initiatives | Opportunity or Reinforcement | Calibration Attendance and Completion  Required Training  TCA Duties  Other: Specify reason under coaching details. |
| Escalation | Opportunity | Other: Specify reason under coaching details. |
| Professional Conduct | Opportunity or Reinforcement | HR Guidelines  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | CSR Certification  Kudos  Other: Specify reason under coaching details. |
| Secure Floor Violation | Opportunity or Reinforcement | CoR  Other: Specify reason under coaching details. |
| Weekly Productivity | Opportunity or Reinforcement | ATA Completions  Call Listening  Monitors  Phone Support  Target Monitoring Team  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.3.1.6.2 Indirect Coaching Reason and Sub-Reasons

Allow for the selection of one or more Indirect Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| ATA Alignment | Opportunity or Reinforcement | Administrative Procedures  Agent Responsiveness  Closing QA Team Notes  Conversation Management  Disclosure  Opening  Professional Etiquette  Program Knowledge  Reasons for Call  Other: Specify reason under coaching details. |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Call Quality | Opportunity or Reinforcement | Call Listening Completions  Special Assignment Completions  Other: Specify reason under coaching details. |
| Corporate / Program Initiatives | Opportunity or Reinforcement | Calibration Attendance and Completion  Required Training  TCA Duties  Other: Specify reason under coaching details. |
| Escalation | Opportunity | Other: Specify reason under coaching details. |
| Professional Conduct | Opportunity or Reinforcement | HR Guidelines  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | CSR Certification  Kudos  Other: Specify reason under coaching details. |
| Secure Floor Violation | Opportunity or Reinforcement | CoR  Other: Specify reason under coaching details. |
| Weekly Productivity | Opportunity or Reinforcement | ATA Completions  Call Listening  Monitors  Phone Support  Target Monitoring Team  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.3.1.7 Coaching Details

When coaching is Direct or Indirect and CSE or non-CSE, provide details of behavior to be coached.

2.3.1.8 Coaching Session Details

When coaching is Direct, CSE or non-CSE, provide the details from the coaching session including action plans developed.

2.3.1.9 Identify Source for eCoaching Log

Allow for the following selection of how the coaching opportunity was identified.

CMS Reported Item

CSR Reported Issue

Internal CCO Reporting

Leadership Listening

Manager Coaching

Quality Call Listening

Supervisor Coaching

Training and Delivery

Verint Quality Monitoring

Walk By

2.3.1.10 Associated with a Call Record

If the coaching log is associated with a Call Record, allow for the entry of call record source and corresponding valid identifier. Available sources are (in display order):

Verint – valid id is numeric, 10 or 19 digits

NGD ID – valid id is any letter or number with a dash, 9 or 16 characters

Avoke – valid id is any letter or number with an underscore, 24 characters

UCID – valid id is any letter or number, 26 characters

2.3.1.11 Verification

Submitter must verify that all the information on the form is true and complete to the best of their knowledge.

2.3.1.12 Required entry fields

The following field are required for submission of eCoaching Logs:

eCoaching Module

Supervisor Name

Program

Delivery Option

Date of coaching or event

Customer Service Escalation

Coaching Reason, Opportunity or Reinforcement, Sub-Coaching Reason

Details of the behavior to be coached

If Direct coaching then detail from coaching session is required

How coaching was identified

Call record associated

If yes call record, then type and valid identifier are required

Verification

2.3.1.13 Access to Submission

Employees with the following job codes will have access and ability to submit eCoaching Logs for Quality Specialist:

Specialist / Other – WACQ02, WACQ03, WACQ12, WISY13, WPPM12, WPPM13

Supervisor / Lead – WACQ13, WACQ40

Manager – WSQA50, WEEX90, WEEX91, WSQA70

Others:

WISO13 – Software Engineer

WISY13 – Systems Analyst

WSTE13 – Testing Engineer

2.3.1.14 No log to self

Submitters of logs will not be available for selection from the list of quality specialists.

2.3.2 Notification of eCoaching Logs

A system generated eMail notification is sent to the appropriate party when an eCoaching Log is submitted.

2.3.2.1 eCoaching Log eMail Format

The following is the basic form of the eCoaching Log eMail notification. The subject and message will change depending on certain criteria.

|  |
| --- |
| To – [to] |
| Subject – [Subject] |
| \*\* This is an automated email. Do not reply to this email. \*\*   [Message]  Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details. [Link to Dashboard]  Form ID: [FormID]  (Please do not respond to this automated notification)  Thank you, eCoaching Log Team http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png |

2.3.2.2 Pending Employee Review

When an eCoaching Log is submitted and the coaching is Direct and the status is Pending Employee Review, the Employee (Quality Specialist) receives a system generated eMail notification.

Subject:

eCL: Pending Employee Review (<EMPLOYEE NAME>))

Message:

A new eCoaching Log has been entered on your behalf. Please click on the link below to review and verify the coaching opportunity received on <**DATE**>.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.3.2.3 Pending Quality Lead Review

When an eCoaching Log is submitted and the coaching is Indirect and the status is Pending Manager Review, the immediate Quality Lead of the Employee (Quality Specialist) receives a system generated eMail notification.

Subject:

eCL: Pending Quality Lead Review (<EMPLOYEE NAME>))

Message:

A new eCoaching Log has been entered on behalf of <**EMPLOYEE NAME**> on <**DATE**> that requires your action. Please click on the link below to review the eCoaching log.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.3.3 Outlier Data Feed (OMR)

Outlier Data Feed for Quality Specialist is not defined.

2.3.4 Quality Data Feed (IQS)

Quality Data Feed for Quality Specialist is not defined.

2.3.5 Electronic Timecard System Data Feed (ETS)

ETS Data Feed for Quality Specialists is not defined.

2.4 Local System Administrator (LSA)

2.4.1 Submission of eCoaching Logs

eCoaching Logs will be submitted for Local System Administrators (LSAs).

2.4.1.1 Display LSAs

Display a list of LSAs regardless of site or location that have the following job codes: WIHD01, WIHD02, WIHD03, WIHD04.

2.4.1.2 Program

Not available at this time.

2.4.1.3 Delivery Option

The delivery options will be:

Yes, I will be delivering the coaching session (also known as Direct)

No, I will not be delivering the coaching session (also known as Indirect)

2.4.1.4 Date of Coaching

Allow for entry of the date of coaching or event.

2.4.1.5 Customer Service Escalation

Not available at this time.

2.4.1.6 Coaching Reasons and Sub-Coaching Reasons

Allow for the selection of one or more the following Coaching Reasons and Sub-Coaching Reasons

2.4.1.6.1 Direct Coaching Reason and Sub-Reasons

Allow for the selection of one or more Direct Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Corporate / Program Initiatives | Opportunity or Reinforcement | Required Training  Other: Specify reason under coaching details. |
| Professional Conduct | Opportunity or Reinforcement | HR Guidelines  Other: Specify reason under coaching details. |
| Quality | Opportunity or Reinforcement | Acct Management  Communication  DCF  Feedback  Special Assign  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | Kudos  LSA Certification  Other: Specify reason under coaching details. |
| Secure Floor Violation | Opportunity or Reinforcement | CoR  Other: Specify reason under coaching details. |
| Weekly Productivity | Opportunity or Reinforcement | DCF Coverage  Email Coverage  Feedback  Floor Walking  Side-by-Side  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.4.1.6.2 Indirect Coaching Reason and Sub-Reasons

Allow for the selection of one or more Indirect Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Corporate / Program Initiatives | Opportunity or Reinforcement | Required Training  Other: Specify reason under coaching details. |
| Professional Conduct | Opportunity or Reinforcement | HR Guidelines  Other: Specify reason under coaching details. |
| Quality | Opportunity or Reinforcement | Acct Management  Communication  DCF  Feedback  Special Assign  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | Kudos  LSA Certification  Other: Specify reason under coaching details. |
| Secure Floor Violation | Opportunity or Reinforcement | CoR  Other: Specify reason under coaching details. |
| Weekly Productivity | Opportunity or Reinforcement | DCF Coverage  Email Coverage  Feedback  Floor Walking  Side-by-Side  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.4.1.7 Coaching Details

When coaching is Direct or Indirect, provide details of behavior to be coached.

2.4.1.8 Coaching Session Details

When coaching is Direct, provide the details from the coaching session including action plans developed.

2.4.1.9 Identify Source for eCoaching Log

Allow for the following selection of how the coaching opportunity was identified.

CMS Contractor (NGS, VCS) Reported Item

CMS Reported Item

Integrated Performance Center

Manager Coaching

Walk By

2.4.1.10 Associated with a Call Record

Not available at this time.

2.4.1.11 Verification

Submitter must verify that all the information on the form is true and complete to the best of their knowledge.

2.4.1.12 Required entry fields

The following fields are required for submission of eCoaching Logs:

eCoaching Module

LSA Name

Delivery Option

Date of coaching or event

Coaching Reason, Opportunity or Reinforcement, Sub-Coaching Reason

Details of the behavior to be coached

If Direct coaching then detail from coaching session is required

How coaching was identified

Verification

2.4.1.13 Access to Submission

Employees with the following job codes will have access and ability to submit eCoaching Logs for LSA:

LSA – WIHD01, WIHD02, WIHD03, WIHD04

LSA Manager – WMPR40, WMPR50

Desktop Manager – WPPM60

Others: WPPT40 – Supervisor, Project/Task

WPPT50 – Manager, Project/Task

WPPT60 – Sr Manager, Project/Task

WISA12 – Administrator, Systems

WISO13 – Software Engineer

WISY13 – Systems Analyst

WSTE13 – Testing Engineer

2.4.1.14 No log to self

Submitters of logs will not be available for selection from the list of LSAs.

2.4.2 Notification of eCoaching Logs

A system generated eMail notification is sent to the appropriate party when an eCoaching Log is submitted.

2.4.2.1 eCoaching Log eMail Format

The following is the basic form of the eCoaching Log eMail notification. The subject and message will change depending on certain criteria.

|  |
| --- |
| To – [to] |
| Subject – [Subject] |
| \*\* This is an automated email. Do not reply to this email. \*\*   [Message]  Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details. [Link to Dashboard]  Form ID: [FormID]  (Please do not respond to this automated notification)  Thank you, eCoaching Log Team http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png |

2.4.2.2 Pending Employee Review

When an eCoaching Log is submitted and the coaching is Direct and the status is Pending Employee Review, the Employee (LSA) receives a system generated eMail notification.

Subject:

eCL: Pending Employee Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered on your behalf. Please click on the link below to review and verify the coaching opportunity received on <**DATE**>.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.4.2.3 Pending Supervisor Review

When an eCoaching Log is submitted and the coaching is Indirect and the status is Pending Supervisor Review, the immediate LSA Manager of the Employee (LSA) receives a system generated eMail notification.

Subject:

eCL: Pending Supervisor Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered on behalf of <**EMPLOYEE NAME**> on <**DATE**> that requires your action. Please click on the link below to review the eCoaching log.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.4.3 Outlier Data Feed (OMR)

Outlier Data Feed for LSA is not defined.

2.4.4 Quality Data Feed (IQS)

Quality Data Feed for LSA is not defined.

2.4.5 Electronic Timecard System Data Feed (ETS)

ETS Data Feed for Local System Administrators is not defined.

2.5 Training

2.5.1 Submission of eCoaching Logs

eCoaching Logs will be submitted for Trainers and Instructors.

2.5.1.1 Display Trainers

Display a list of Trainers/Instructors regardless of site or location that have the following job codes:

WTTI02 – Instructor

WTTR12 – Specialist, Training

WTTR13 – Sr Specialist, Training

WTID13 – Sr Developer, Instructional

2.5.1.2 Behavior

Where was this behavior observed?

Production

Training

Other

2.5.1.3 Delivery Option

The delivery options will be:

Yes, I will be delivering the coaching session (also known as Direct)

No, I will not be delivering the coaching session (also known as Indirect)

2.5.1.4 Date of Coaching

Allow for entry of the date of coaching or event.

2.5.1.5 Customer Service Escalation

Determine if coaching or event is a CSE.

Note: only CSE related Coaching Reasons will be available if Yes selected.

2.5.1.6 Coaching Reasons and Sub-Coaching Reasons

Allow for the selection of one or more the following Coaching Reasons and Sub-Coaching Reasons

2.5.1.6.1 Direct Coaching Reason and Sub-Reasons

Allow for the selection of one or more Direct Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| Attendance | Opportunity or Reinforcement | Improper notification  Late or missing meetings  Number of hours exceeded  Number of occurrences exceeded  Other: Specify reason under coaching details. |
| Attrition Tracking | Opportunity or Reinforcement | Inaccurate or missing information  Other: Specify reason under coaching details. |
| Behavior | Opportunity or Reinforcement | Communication is unprofessional in nature and/or offending to others  Computer - Computer left unlocked  Distraction of others (i.e. noisy, visiting)  Dress Code  GDIT Policy violation  Harassment/Workplace Conduct  Insubordination  Privacy/Security  SOP non-compliance  Travel/AMEX policy  Other: Specify reason under coaching details. |
| Classroom Documentation | Opportunity or Reinforcement | Attendance/Corrective actions not coached timely  DTR information not accurate  Incomplete DTR  Other: Specify reason under coaching details. |
| Classroom Management | Opportunity or Reinforcement | Missed Level 1 goal - class  Missed Level 1 goal - year  Other: Specify reason under coaching details. |
| Confidentiality | Opportunity or Reinforcement | Failed to keep sensitive information safe  Other: Specify reason under coaching details. |
| CSR Completion of Required Training | Opportunity or Reinforcement | CCO Learning for CSRs completed  CCO MyLMS for CSRs completed  Other: Specify reason under coaching details. |
| CSR Observations | Opportunity or Reinforcement | Missed quarterly requirement  Other: Specify reason under coaching details. |
| CUP & CCO Learning Completions | Opportunity or Reinforcement | Deadline not met - per item  Other: Specify reason under coaching details. |
| Emergency Response to Facility Alerts | Opportunity or Reinforcement | Class/Instructor not in assigned area  Other: Specify reason under coaching details. |
| ETS | Opportunity or Reinforcement | Fails to review labor results/does not initiate correct action  Missed approval deadline  Not completed daily  Wrong codes/times  Other: Specify reason under coaching details. |
| Level One Metric | Opportunity or Reinforcement | Missed metric - class  Missed metric - month  Missed metric - year  Other: Specify reason under coaching details. |
| Media Policy | Opportunity or Reinforcement | Local Media violation  Other Media violation  Social Media violation  Other: Specify reason under coaching details. |
| Misreporting | Opportunity or Reinforcement | DTR  Exam Review  Level 1  Resume  Timecard  WSR  Other: Specify reason under coaching details. |
| MyLMS Completions | Opportunity or Reinforcement | Deadline not met  Other: Specify reason under coaching details. |
| Operations Support | Opportunity or Reinforcement | Assigned to committee - inactive  Disregards needs and issues/fails to report issues  Does not participate actively within the call center  Failed to respond to request to take calls  Fails to provide continued support to improve Training completions  Fails to respond to assigned Supervisors' team needs  Missed taking calls quarterly requirement  Training buddy system not assigned or not working  Other: Specify reason under coaching details. |
| Peer Observations | Opportunity or Reinforcement | Failed to complete assignments - per class  Other: Specify reason under coaching details. |
| Personal ETS | Opportunity or Reinforcement | Missed signature deadline  Not completed daily  Wrong codes/times  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | Actively participates in call center activities and committees  Attendance - Attends meetings as scheduled  Attendance - Perfect Attendance  Classroom Metric SLA Goal achieved-Class/Monthly/Year  CSR ETS - Correctly executed - weekly ETS  CSR Observation - Exceeded Quarterly requirements  Level One SLA - Exceeded goal-Class/Monthly/Year  Met CUP / CCO Learning Completions Deadline As Verified  No violations - per sweep  Operations Support - Is proactive to report needs and issues  Operations Support - Proactively supports assigned Supervisors  Peer Observation - Exceeded assignments - per class  Personal ETS - Correctly executed - weekly  Trainer Observation - Meets or exceeds guidelines  Weekly Status - Perfect Monthly Compliance  Weekly Status Report - Perfect monthly compliance  Other: Specify reason under coaching details. |
| RTW | Opportunity or Reinforcement | Missed yearly pass rate metric  RTW Summary Page information not accurate/missing information  Other: Specify reason under coaching details. |
| Secure Floor Violations | Opportunity or Reinforcement | Badge Policy  Cell phone/electronic device  Clean desk  Computer - Computer left unlocked  Fails to report known issue  Food  Misuse of desk or locker  Unlocked training room, desk, filing cabinet  Other: Specify reason under coaching details. |
| SLA-Pass Rate | Opportunity or Reinforcement | Missed metric - class  Missed metric - month  Missed metric - year  Other: Specify reason under coaching details. |
| Taking Calls | Opportunity or Reinforcement | Failed to respond to request  Missed quarterly requirement  Other: Specify reason under coaching details. |
| Trainer Development | Opportunity or Reinforcement | Behavior training  Classroom deadlines  ETS - timesheets and attendance  Presentation Skills  Trainer CUP & CCO Learning completions  Trainer MyLMS completions  Trainer On-boarding  Trainer WSR completion  Other: Specify reason under coaching details. |
| Trainer Expectations | Opportunity or Reinforcement | Alias names  Bilingual Certification not completed as outlined for bilingual CSRs  CCO Learning & MyLMS for CSRs completed  Class Confirmations  ETO e-mail  Filing hard copies of certification documents  On-boarding  Ops Summary e-mail (from DTR)  Other: Specify reason under coaching details. |
| Trainer Observations | Opportunity or Reinforcement | Fails to meet SOP  Other: Specify reason under coaching details. |
| Weekly Status Report | Opportunity or Reinforcement | Incomplete/Inaccurate  Missed deadline  Other: Specify reason under coaching details. |
| Customer Service Escalation (available only if the log is a CSE) | Opportunity | Argues with other trainer  Compromises PHI/PII  Encourages / commits fraud  Releases assessment information to the CSRs in class  Threatens employee  Uses derogatory / disrespectful words  Uses profanity of any kind  Verbally abusive  Yells, screams  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.5.1.6.2 Indirect Coaching Reason and Sub-Reasons

Allow for the selection of one or more Indirect Coaching Reasons and Sub-Coaching Reasons.

|  |  |  |
| --- | --- | --- |
| Coaching Reason | Opportunity/Reinforcement | Sub-Coaching Reason |
| Attendance | Opportunity or Reinforcement | Improper notification  Late or missing meetings  Number of hours exceeded  Number of occurrences exceeded  Other: Specify reason under coaching details. |
| Attrition Tracking | Opportunity or Reinforcement | Inaccurate or missing information  Other: Specify reason under coaching details. |
| Behavior | Opportunity or Reinforcement | Communication is unprofessional in nature and/or offending to others  Computer - Computer left unlocked  Distraction of others (i.e. noisy, visiting)  Dress Code  GDIT Policy violation  Harassment/Workplace Conduct  Insubordination  Privacy/Security  SOP non-compliance  Travel/AMEX policy  Other: Specify reason under coaching details. |
| Classroom Documentation | Opportunity or Reinforcement | Attendance/Corrective actions not coached timely  DTR information not accurate  Incomplete DTR  Other: Specify reason under coaching details. |
| Classroom Management | Opportunity or Reinforcement | Missed Level 1 goal - class  Missed Level 1 goal - year  Other: Specify reason under coaching details. |
| Confidentiality | Opportunity or Reinforcement | Failed to keep sensitive information safe  Other: Specify reason under coaching details. |
| CSR Completion of Required Training | Opportunity or Reinforcement | CCO Learning for CSRs completed  CCO MyLMS for CSRs completed  Other: Specify reason under coaching details. |
| CSR Observations | Opportunity or Reinforcement | Missed quarterly requirement  Other: Specify reason under coaching details. |
| CUP & CCO Learning Completions | Opportunity or Reinforcement | Deadline not met - per item  Other: Specify reason under coaching details. |
| Emergency Response to Facility Alerts | Opportunity or Reinforcement | Class/Instructor not in assigned area  Other: Specify reason under coaching details. |
| ETS | Opportunity or Reinforcement | Fails to review labor results/does not initiate correct action  Missed approval deadline  Not completed daily  Wrong codes/times  Other: Specify reason under coaching details. |
| Level One Metric | Opportunity or Reinforcement | Missed metric - class  Missed metric - month  Missed metric - year  Other: Specify reason under coaching details. |
| Media Policy | Opportunity or Reinforcement | Local Media violation  Other Media violation  Social Media violation  Other: Specify reason under coaching details. |
| Misreporting | Opportunity or Reinforcement | DTR  Exam Review  Level 1  Resume  Timecard  WSR  Other: Specify reason under coaching details. |
| MyLMS Completions | Opportunity or Reinforcement | Deadline not met  Other: Specify reason under coaching details. |
| Operations Support | Opportunity or Reinforcement | Assigned to committee - inactive  Disregards needs and issues/fails to report issues  Does not participate actively within the call center  Failed to respond to request to take calls  Fails to provide continued support to improve Training completions  Fails to respond to assigned Supervisors' team needs  Missed taking calls quarterly requirement  Training buddy system not assigned or not working  Other: Specify reason under coaching details. |
| Peer Observations | Opportunity or Reinforcement | Failed to complete assignments - per class  Other: Specify reason under coaching details. |
| Personal ETS | Opportunity or Reinforcement | Missed signature deadline  Not completed daily  Wrong codes/times  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | Actively participates in call center activities and committees  Attendance - Attends meetings as scheduled  Attendance - Perfect Attendance  Classroom Metric SLA Goal achieved-Class/Monthly/Year  CSR ETS - Correctly executed - weekly ETS  CSR Observation - Exceeded Quarterly requirements  Level One SLA - Exceeded goal-Class/Monthly/Year  Met CUP / CCO Learning Completions Deadline As Verified  No violations - per sweep  Operations Support - Is proactive to report needs and issues  Operations Support - Proactively supports assigned Supervisors  Peer Observation - Exceeded assignments - per class  Personal ETS - Correctly executed - weekly  Trainer Observation - Meets or exceeds guidelines  Weekly Status - Perfect Monthly Compliance  Weekly Status Report - Perfect monthly compliance  Other: Specify reason under coaching details. |
| RTW | Opportunity or Reinforcement | Missed yearly pass rate metric  RTW Summary Page information not accurate/missing information  Other: Specify reason under coaching details. |
| Secure Floor Violations | Opportunity or Reinforcement | Badge Policy  Cell phone/electronic device  Clean desk  Computer - Computer left unlocked  Fails to report known issue  Food  Misuse of desk or locker  Unlocked training room, desk, filing cabinet  Other: Specify reason under coaching details. |
| SLA-Pass Rate | Opportunity or Reinforcement | Missed metric - class  Missed metric - month  Missed metric - year  Other: Specify reason under coaching details. |
| Taking Calls | Opportunity or Reinforcement | Failed to respond to request  Missed quarterly requirement  Other: Specify reason under coaching details. |
| Trainer Development | Opportunity or Reinforcement | Behavior training  Classroom deadlines  ETS - timesheets and attendance  Presentation Skills  Trainer CUP & CCO Learning completions  Trainer MyLMS completions  Trainer On-boarding  Trainer WSR completion  Other: Specify reason under coaching details. |
| Trainer Expectations | Opportunity or Reinforcement | Alias names  Bilingual Certification not completed as outlined for bilingual CSRs  CCO Learning & MyLMS for CSRs completed  Class Confirmations  ETO e-mail  Filing hard copies of certification documents  On-boarding  Ops Summary e-mail (from DTR)  Other: Specify reason under coaching details. |
| Trainer Observations | Opportunity or Reinforcement | Fails to meet SOP  Other: Specify reason under coaching details. |
| Weekly Status Report | Opportunity or Reinforcement | Incomplete/Inaccurate  Missed deadline  Other: Specify reason under coaching details. |
| Customer Service Escalation (available only if the log is a CSE) | Opportunity | Argues with other trainer  Compromises PHI/PII  Encourages / commits fraud  Releases assessment information to the CSRs in class  Threatens employee  Uses derogatory / disrespectful words  Uses profanity of any kind  Verbally abusive  Yells, screams  Other: Specify reason under coaching details. |

Note: Other: Specify reason under coaching details. should be last in the list.

2.5.1.7 Coaching Details

When coaching is Direct or Indirect, provide details of behavior to be coached.

2.5.1.8 Coaching Session Details

When coaching is Direct, provide the details from the coaching session including action plans developed.

2.5.1.9 Identify Source for eCoaching Log

Allow for the following selection of how the coaching opportunity was identified.

Classroom Observation

CMS Reported Item

CSR Reported Issue

Floor Walking

Internal CCO Reporting

Leadership Listening

Manager Coaching

Quality Call Listening

Supervisor Coaching

2.5.1.10 Associated with a Call Record

If the coaching log is associated with a Call Record, allow for the entry of call record source and corresponding valid identifier. Available sources are (in display order):

Verint – valid id is numeric, 10 or 19 digits

NGD ID – valid id is any letter or number with a dash, 9 or 16 characters

Avoke – valid id is any letter or number with an underscore, 24 characters

UCID – valid id is any letter or number, 26 characters

2.5.1.11 Verification

Submitter must verify that all the information on the form is true and complete to the best of their knowledge.

2.5.1.12 Required entry fields

The following fields are required for submission of eCoaching Logs:

eCoaching Module

Trainer Name

Behavior

Delivery Option

Date of coaching or event

Customer Service Escalation

Coaching Reason, Opportunity or Reinforcement, Sub-Coaching Reason

Details of the behavior to be coached

If Direct coaching then detail from coaching session is required

How coaching was identified

Call record associated

If yes call record, then type and valid identifier are required

Verification

2.5.1.13 Access to Submission

Employees with the following job codes will have access and ability to submit eCoaching Logs for Trainers/Instructors:

Trainers – WTTR12, WTTR13, WTID13

Supervisor – WTTR40

Manager – WTTR50

Note: WTTR12, WTTR13, WTID13 can only submit to instructors with job code WTTI02

2.5.1.14 No log to self

Submitters of logs will not be available for selection from the list of trainers/instructors.

2.5.2 Notification of eCoaching Logs

A system generated eMail notification is sent to the appropriate party when an eCoaching Log is submitted.

2.5.2.1 eCoaching Log eMail Format

The following is the basic form of the eCoaching Log eMail notification. The subject and message will change depending on certain criteria.

|  |
| --- |
| To – [to] |
| Subject – [Subject] |
| \*\* This is an automated email. Do not reply to this email. \*\*   [Message]  Please click here to open the coaching application and select the 'My Dashboard' tab to view the below form ID for details. [Link to Dashboard]  Form ID: [FormID]  (Please do not respond to this automated notification)  Thank you, eCoaching Log Team http://cwe.vangent.local/sites/teams/CMS/CSR/eCoaching/SiteImages/BCC-eCL-LOGO-10142011-185x40.png |

2.5.2.2 Pending Employee Review

When an eCoaching Log is submitted and the coaching is Direct and the status is Pending Employee Review, the Employee (Trainer) receives a system generated eMail notification.

Subject:

eCL: Pending Employee Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered on your behalf. Please click on the link below to review and verify the coaching opportunity received on <**DATE**>.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.5.2.3 Pending Supervisor Review

When an eCoaching Log is submitted and the coaching is Indirect and the status is Pending Supervisor Review, the immediate Training Supervisor of the Employee (Trainer) receives a system generated eMail notification.

Subject:

eCL: Pending Supervisor Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered on behalf of <**EMPLOYEE NAME**> on <**DATE**> that requires your action. Please click on the link below to review the eCoaching log.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.5.2.4 Pending Manager Review

When an eCoaching Log is submitted and the coaching is Direct and is a Customer Service Escalation and the status is Pending Manager Review, the immediate Manager of the Employee (Trainer) receives a system generated eMail notification.

Subject:

eCL: Pending Manager Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <**DATE** > for <**EMPLOYEE NAME**> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.5.2.5 Pending Manager Review

When an eCoaching Log is submitted and the coaching is Indirect and is a Customer Service Escalation and the status is Pending Manager Review, the immediate Manager of the Employee (Trainer) receives a system generated eMail notification.

Subject:

eCL: Pending Manager Review (<EMPLOYEE NAME>)

Message:

A new eCoaching Log has been entered and requires your action. Please click on the link below to review and verify that the eCL entered on <**DATE** > for <**EMPLOYEE NAME**> is a valid Customer Service Escalation (CSE). Further directions are provided on the form.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for and <DATE> is the date and time the log was submitted.

2.5.3 Outlier Data Feed (OMR)

Outlier Data Feed for Training is not defined.

2.5.4 Quality Data Feed (IQS)

Quality Data Feed for Training is not defined.

2.5.5 Electronic Timecard System Data Feed (ETS)

ETS Data Feed for Training is not defined.

2.5.6 Level 1 Report

To be defined.

**3.0 Dashboard Display**

3.1 Dashboard Display

Dashboard Display of eCoaching Logs is defined in sections IV, IV.1 through IV.VII above.

3.2 Review Page Display

eCoaching and Warning logs can be selected from the Dashboard and it’s corresponding information displayed and reviewed.

3.2.1 All Reviewers

Display the following for all reviewers of coaching and warning logs:

3.2.1.1 Informational Display

When displaying a form, the following information needs to be displayed.

3.2.1.1.1 Coaching and Warning Logs

For both Coaching and Warning Logs, display the following information:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Page: | If the log status contains ‘Pending’, then display “Review”  If the log status is ‘Completed’, then display “Final” |
| 2 | FormID: | Display form name of the log |
| 3 | Status: | Display status of log |
| 4 | Date Submitted: | Display submitted date of the log based on Pacific Daylight Time |
| 5 | Type: | If the source of the log is direct, then display “Direct”  If the source of the log is indirect, then display “Indirect” |
| 6 | If the log is a Coaching log and is Direct then display  Date of Coaching: | Display the coaching date of the log |
| If the log is a Coaching log and is Indirect then display  Date of Event: | Display the event date of the log |
| If the log is a Warning log then display  Date the warning was issued: | Display the warning given date of the log |
| 7 | Source: | Display the source of the log |
| 8 | Site: | Display the site or location of the log |
| 9 | If the log is a Verint one then then display  Verint ID: | Display the Verint ID of the log |
| If the log is an Avoke one then display  Avoke ID: | Display the Avoke ID of the log |
| If the log is a NGD Activity then display  NGD Activity ID: | Display the NGD Activity ID of the log |
| If log is a UCID one then display  Universal Call ID: | Display the Universal Call ID of the log |
| 10 | If the log is a Verint one then display  Scorecard Name: | Display the scorecard form name of the log |
| 11 | Employee: | Display the employee of the log |
| 12 | Supervisor: | Display the supervisor of the employee of the log |
| 13 | Manager:  If the log is for Low CSAT then display ‘(Assigned Reviewer)’ after the manager’s name | Display the manager of the employee or assigned reviewer of the log |
| 14 | Submitter: | Display the submitter of the log |

Examples:



3.2.1.1.2 Warning Logs

For Warnings, do not display labels or values for Call Record ID (Verint, Avoke, NGD ID, UCID), or Scorecard Name. Also, Warnings will not have details, coaching notes or comments to display.

3.2.1.2 Opening

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Please do NOT include PII or PHI in the log entry. | Display text in red color when eCoaching Log  Do not display when Warning log |
| 2 | Please note that all fields are required. Double-check your work to ensure accuracy. | Display text |

3.2.1.3 Coaching/Warning Reasons Found

When coaching or warning reasons are found for the corresponding log, display the coaching/warning reason, coaching/warning sub-reason and the coaching/warning value associated with the log.

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Coaching Reason(s) | Display text |
| 2 |  | If the log is a Coaching log then display the related coaching reasons, coaching sub-reasons, and associated coaching value for the coaching log |
|  | If the log is a Warning log then display the related warning reasons, warning sub-reasons, and associated warning value for the warning log |

3.2.1.4 No Coaching Reasons Found

When no coaching or warning reasons are found for the corresponding log, display the following message:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Coaching Reason(s) | Display text |
| 2 | No data was returned | When no data was found for coaching/warning log then display text |

3.2.2 Submitter of Log

When the submitter of the log reviews it and status is not completed, then display the following information:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If manager notes of the log exist then display text and manager notes of the log |
| 3 | Coaching Notes: | Display the coaching notes of log |

3.2.3 Employee of Log

When the Employee recipient reviews a log and the status is not completed, then display the following information:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If manager notes of the log exist then display text and manager notes of the log |
| 3 | Coaching Notes: | Display the coaching notes of log |

3.2.3.1 Acknowledgement

When the log source is IQS, LimeSurvey, Verint-GDIT, or Verint-TQC and status is Pending Acknowledgement (and not acknowledged by Supervisor) or Pending Employee Review and Supervisor has acknowledged the log, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | 1. Check the box below to acknowledge the monitor: | Display text |
| 2 |  | Check box data entry |
| 3 |  | Date data entry |
| 4 | Submit | Button to save information |

3.2.3.2 Acknowledge and feedback

When the log source is not IQS, LimeSurvey, Verint-GDIT, or Verint-TQC and status is Pending Employee Review, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | 1. Check the box below to acknowledge the coaching opportunity: | Display text |
| 2 |  | Check box data entry |
| 3 | I have read and understand all the information provide on this eCoaching Log. | Display text |
| 4 | 2. Provide any comments or feedback below: | Display text |
| 5 |  | Text data entry |
| 6 | (max length 3,000 chars)  Provide as much detail as possible | Display text |
| 7 | Submit | Button to save information |

3.2.4 Supervisor of record

When the Supervisor of record reviews a log and the status is not completed, then display the following information:

3.2.4.1 Acknowledgement

When the log source is IQS, LimeSurvey, Verint-GDIT, or Verint-TQC and status is Pending Acknowledgement (and not acknowledged by Employee) or Pending Supervisor and Employee has acknowledged the log, then display the following

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | 1. Check the box below to acknowledge the monitor: | Display text |
| 2 |  | Check box data entry |
| 3 |  | Date data entry |
| 4 | Submit | Button to save information |

3.2.4.2 Pending Supervisor Review

When the log status is Pending Supervisor review, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If coaching is required or manager notes of the log exist then display text and manager notes of the log |
| 3 | Enter the date of coaching: | Date data entry |
| 4 | 2. Provide the details from the coaching session including action plans developed: | Text data entry |
| 5 | (max length 3,000 chars)  Provide as much detail as possible | Display text |
| 6 | Submit | Button to save information |

3.2.4.3 Not Pending Supervisor Review

When the log status is Not Pending Supervisor review, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If manager notes of the log exist then display text and manager notes of the log |
| 3 | Coaching Notes: | Display the coaching notes of log |

3.2.5 Manager of record

When the Manager of record reviews a log and the status is not completed, then display the following information:

3.2.5.1 Pending Manager Review

When the log status is Pending Manager Review, then display the following:

3.2.5.1.1 Research Required

When coaching reason is Current Coaching Initiative or OMR/Exceptions and coaching value is Research Required, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | If the source of the log is OMR then display “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 Contact Center Operations 46.0 Outlier Management Report (OMR): Outlier Research Process SOP and provide the details in the record below. | Display text |
| 3 | 1. Date | Date data entry |
| 4 | 2. Based off of your research does this record require coaching? | Display text |
| 5 | Yes  No | Radio button data entry  Radio button data entry |
| 6 | 3. Please provide reason / explanation / justification as to why the item is coachable for the Supervisor: | If radio button Yes selected, then display text |
| 7 | 3. What was the main reason this item was not coachable? | If radio button No selected, then display text |
| 8 |  | If radio button No selected, then display drop down list with ‘Other’ |
| 9 | 4. Please provide reason / explanation / justification as to why the item was not coach: | If radio button No selected, then display text |
| 10 |  | Text data entry |
| 11 | (max length 3,000 chars)  These notes will only be viewed by Supervisors |  |
| 12 | Submit | Button to save information |

3.2.5.1.1.1 SOP Link

Contact Center Operations 46.0 Outlier Management Report (OMR): Outlier Research Process SOP is a hyper link to <https://cco.gdit.com/Resources/SOP/Contact%20Center%20Operations/CC_46.0_OMR%20Outlier%20Research%20Process.pdf>.

3.2.5.1.2 Customer Service Escalation

When log is Customer Service Escalation, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Coaching Notes: | If coaching notes of the log exist then display text and coaching notes of the log |
| 3 | Review the submitted coaching opportunity and (1) 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 is not a CSE, enter notes for the Supervisor to use to coach the Employee. | Display text |
| 4 | 1. Is the coaching opportunity a confirmed Customer Service Escalation (CSE)? | Display text |
| 5 | Yes, this is a confirmed Customer Service Escalation  No, this is not a confirmed Customer Service Escalation | Radio button data entry  Radio button data entry |
| 6 | 2. Enter the date coached: | If radio button Yes selected, then display text |
| 7 | 2. Enter the date reviewed: | If radio button No selected, then display text |
| 8 |  | Date data entry |
| 9 | 3. Provide the details from the coaching session including action plans developed: | If radio button Yes selected, then display text |
| 10 | 3. Provide explanation for the Employee and Supervisor as to reason why this is not a CSE: | If radio button No selected, then display text |
| 11 |  | Text data entry |
| 12 | (max length 3,000 chars)  Provide as much detail as possible | Display text |
| 13 | Submit | Button to save information |

3.2.5.2 Not Pending Manager Review

When the log status is Not Pending Manager Review, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If manager notes of the log exist then display text and manager notes of the log |
| 3 | Coaching Notes: | Display the coaching notes of log |

3.2.6 Other reviewers

When someone other than Employee, Supervisor, Manager or Submitter of record or an Employee, Supervisor, Manager or Submitter of the record in a condition other than described above reviews a log, then display the following information:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Management Notes: | If manager notes of the log exist then display text and manager notes of the log |
| 3 | Coaching Opportunity was a confirmed Customer Service Escalation | If log is determined to be a Customer Service Escalation then display text |
| 4 | Coaching Opportunity was not a confirmed Customer Service Escalation | If log is determined not to be a Customer Service Escalation then display text |
| 5 | Coaching Notes: | Display the coaching notes of log |
| 6 | Employee Review Information: | Display text and the employee of the log |
| 7 | Reviewed and acknowledged Quality Monitor on | If source is IQS, LimeSurvey, Verint-GDIT, Verint-TQC then display text and CSR review auto date of log |
| 8 | Supervisor Review Information: | If source is IQS, LimeSurvey, Verint-GDIT, Verint-TQC then display the supervisor of the employee of the log |
| 9 | Reviewed and acknowledged Quality Monitor on | If source is IQS, LimeSurvey, Verint-GDIT, Verint-TQC then display text and supervisor review auto date of log |
| 10 | Reviewed and acknowledged coaching opportunity on | If source is not IQS, LimeSurvey, Verint-GDIT, Verint-TQC then display text and CSR review auto date of log |
| 11 | Employee Comments/Feedback: | If source is not IQS, LimeSurvey, Verint-GDIT, Verint-TQC then display text and CSR comments of the log |

3.2.7 Unauthorized reviewers

Anyone who is not the Employee, Supervisor, Manager or submitter of record or otherwise not authorized to review a log shall be displayed an appropriate message and not review the log.

**4.0 Employee Information**

4.1 Employee Information

A record will be kept for each employee.

4.1.1 Employee Hierarchy

Employee hierarchy will be maintained such that each employee is associated with their immediate supervisor as identified in Aspect eWFM. The employee’s manager value is obtained from PeopleSoft as the supervisor of the employee’s supervisor.

4.2 Employee Data Feed

Employee information will populated from data feeds.

4.2.1 PeopleSoft Employee Information

Employee information will be received daily at around 4:30 AM EST from GDIT Human Resources. The source of the data is PeopleSoft which is maintained by Human Resources.

4.2.1.1 File Location and Name

The location of the file will be: \\vrivscors01\BCC Scorecards\Coaching\HRInfo\

The name of the file will be PS\_Employee\_Information\_mmddyyyy.csv

Where mmddyyyy is the date in month, day, year.

4.2.1.2 File Format and Layout

The file shall be in a comma separated value (csv) format. The data file layout is described in CCO\_eCoaching\_Log\_User\_File\_Layout.docx.

4.2.1.3 Load Schedule

The data load is scheduled to run daily at 8:00 PM EST.

4.2.2 Aspect Employee Information with program

Employee information will be received daily at around 6:00 AM EST from GDIT Work Force Management. The source of the data is Aspect/eWFM which is maintained by Strategic Workforce Planning.

4.2.2.1 File Location and Name

The location of the file will be: \\vrivscors01\BCC Scorecards\Coaching\EmpInfo\

The name of the file will be Employee\_information\_WithProgram.csv

4.2.2.2 File Format and Layout

The file shall be in a comma separated value (csv) format. The data file layout is described in CCO\_eCoaching\_Log\_User\_File\_Layout.docx.

4.2.2.3 Load Schedule

The data load is scheduled to run daily at 8:00 PM EST.

4.2.3 Special Handling

Values contained in the data files require special handling.

4.2.3.1 Apostrophes

Employee names containing apostrophes will have them removed prior to inserting into the database. However, email addresses will retain apostrophes for eCoaching Log notifications.

4.2.3.2 Re-used LAN IDs

When LAN IDs are re-issued to a new employee, the previous employee’s eCoaching Logs should not be combined or displayed with the new employee.

4.3 Log Inactivation

Coaching and Warning logs will be inactivated based on employee status.

4.3.1 Inactivate Coaching Logs

4.3.1.1 Employee Status

Employees that have an Active status of T (termed) or D (deceased) in PeopleSoft, will have their uncompleted eCoaching Logs set to “Inactive” status immediately after receiving and processing the Active status change. Employees that have a status of EA (Extended Absence) in Aspect eWFM, will have their uncompleted eCoaching Logs set to “Inactive” status immediately after receiving and processing the status change.

4.3.1.2 Missing Record

eCoaching Logs for employees which are missing from the data feed are set to “Inactive” status, immediately after receiving and processing the employee data feed from PeopleSoft.

4.3.2 Inactivate Warning Logs

4.3.2.1 Employee Status

Employees that have an Active status of T (termed) or D (deceased) in PeopleSoft, will have their uncompleted eCoaching Logs set to “Inactive” status immediately after receiving and processing the Active status change.

4.3.2.2 Expired

eCoaching Warning Logs for employees will be modified to set “Active” flag to False 13 weeks (91 days) after the date the warning was given.

**5.0 Administrative Functions**

5.1 Delete Records

Provide a means of deleting coaching or warning records when directed by the Program Manager. Program Manager will receive request from Human Resources.

5.1.1 Application

The process to delete coaching or warning logs shall be separate and distinct from other eCoaching systems.

5.1.1.1 Permissions to Delete

Program Manager will be the only one who will have permissions to delete coaching or warning logs in the production environment.

5.1.1.2 Search for Log

Allow for searching for a coaching or warning log by form name.

5.1.1.3 Display Information

When log is found, display the form name, employee/recipient LAN ID, and employee/recipient employee ID. If log is not found then display an appropriate error message.

5.1.1.4 Review Log

Provide for displaying and reviewing the information contained in the log.

5.1.1.5 Confirmation

When coaching or warning log is selected for deletion, require the user to provide confirmation of yes to delete or no/cancel to return to previous screen.

5.1.1.6 Delete Log

Upon confirmation, physically delete the coaching or warning log along with corresponding reason information. Display a message upon successful deletion or an error message if not successful.

5.1.1.7 Backup

There will be no copy, backup, or logging information related to the deletion.

5.2 Inactivate Records

Provide a means of inactivating coaching or warning records when directed by the Program Manager.

5.2.1 Manual Process

When requested by Program Manager, manually change the status of individual coaching or warning logs.

5.2.2 Automatic Process

Retrieve a file containing coaching or warning log information and change their status. Coaching logs and warning logs will be processed from separate files.

5.2.2.1 File Location and Name

The location of the files will be: \\vrivscors01\BCC Scorecards\Coaching\Inactivations\

The name of the file for inactivating coaching logs will be eCL\_Coaching \_mmddyyyy.csv

The name of the file for inactivating warning logs will be eCL\_Warning\_mmddyyyy.csv

Where mmddyyyy is the date in month, day, year.

5.2.2.2 File Format and Layout

Each file shall be in a comma separated value (csv) format. The data file layout for both files will be a field containing the log’s Form Name.

Example: eCL-John.Doe-1002249

5.2.2.3 Schedule

The job is scheduled to run daily at 10:00 PM EST.

5.2.2.4 Results

5.2.2.4.1 Validation

Records which are unsuccessful in processing will be reported along with the reason they were unsuccessful. To inactive, a Coaching log must be in a Pending status while a Warning log must be in Completed status.

Unsuccessful processing reasons will be:

Form Name doesn’t exist

Invalid status for inactivation

5.2.2.4.2 Notification

The Program representative will be notified by email upon the completion of the inactivation feed. Attached to the email will be a file in .CSV format containing the following information:

FormName – from the input file

Message – whether successfully inactivated for validation error message

ProcessDate – date of processing in CCYY-MM-DD HH:MM:SS format

The file name shall be the input file name with Processed added to it.

**6.0 Reporting**

6.1 Historical Dashboard Extract

Provide a means to extract data from the Historical Dashboard to an Excel file.

6.1.1 Filters

The data extracted shall match the filter settings on dashboard at time of extract.

6.1.2 Data

The following information shall be included in the extract from coaching and/or warning logs

Coaching ID

Form Name

Program Name (Marketplace, Medicare, NA)

Employee ID

Employee Name

Supervisor Name

Manager Name

Site (City/Location)

Source (Direct, Indirect)

Sub-coaching Source

Coaching Reason

Sub-coaching Reason

Value (Did not meet goal, Met goal, Opportunity, etc.)

Status

Submitter Name

Event Date

Coaching Date

Verint ID

Description

Coaching Notes

Submitted Date

Supervisor Reviewed Auto Date

Manager Review Manual Date

Manager Review Auto Date

Manager Notes

CSR Review Auto Date

CSR Comments