

**Title: eCoaching Log**

**Functional Specification**

|  |  |  |
| --- | --- | --- |
| Last Revision | Last Review | Description |
| 11/27/2018 |  | TFS12526 – eCL IIS Log Reporting |

Prepared by: Date:

Department, Location:

Approved by: Date:

(Signatures may be written or via e-mail)

**Change History Log**

| **Date** | **Change Description** | **Author** |
| --- | --- | --- |
| 01/26/2016 | TFS1075 – Requirements Peer Review updates | Doug Stearns |
| 01/26/2016 | TFS1075 – Requirements Peer Review updates – missed some updates when moving requirements from old fs to new | Doug Stearns |
| 02/03/2016 | TFS1075 – Requirements Peer Review updates  2.1.2 User Interfaces – added URLs | Doug Stearns |
| 02/04/2016 | TFS1710 – eCL Email Reminder  Added the following requirements:  3.2.2.4 Email Reminder (and child requirements) | Doug Stearns |
| 02/09/2016 | TFS1710 – eCL Email Reminder  Modified the following requirements based on review  3.2.2.5.3 Time Frame | Doug Stearns |
| 02/11/2016 | TFS1877 – eCL Low CSAT Hierarchy Managers  Added the following requirement:  3.2.5.1.5.4 Hierarchy Manager | Doug Stearns |
| 02/17/2016 | TFS1914 – eCL OMR Short Calls feed  Modified or added the following requirements  3.2.5.1.5.1 Research Required (added ISQ to number 2)  3.2.5.1.5.1.3 Performance Report Catalog Link for ISQ | Doug Stearns |
| 02/19/2016 | TFS1914 – eCL OMR Short Calls feed  Corrected typo in 3.2.5.1.5.1 Research Required | Doug Stearns |
| 02/22/2016 | TFS1710 – eCL Email Reminder  Modified the following requirements based on review  3.2.2.5.3 Time Frame | Doug Stearns |
| 02/26/2016 | TFS2052 – eCL Survey Reminder  Added the following requirements  3.2.9.1.2.2 eMail Reminder and child requirements | Doug Stearns |
| 03/02/2016 | TFS2145 – eCL eMail Reminder limit  Modified the following requirement  3.2.2.5.3 Time Frame (changed title and added note) | Doug Stearns |
| 03/08/2016 | TFS2167 – eCL CSR comments display  Modified the following requirement  3.2.5.1.6 Other Reviewers (revised numbers 7 through 11) | Doug Stearns |
| 03/08/2016 | TFS2182 – eCL LCS reminder email to correct manager  Modified the following requirement  3.2.2.5.5 Email Recipient | Doug Stearns |
| 3/10/2016 | CR1732 – eCL Short Duration Reporting  Added the following requirements  3.2.3.4 and subsequent | Lisa Stein |
| 3/21/2016 | CR1732 – eCL Short duration Reporting  Updates per review  3.2.3.4.10 – Moved static text to 3.2.5 Log Review  3.2.3.4.11 – Updated eCoaching status to Pending Supervisor Review  3.2.5.1.4.2 – Updated for SDR (Research required) Field Label/Static Text and Condition | Lisa Stein |
| 03/22/2016 | TFS2249 – eCL CSR Survey text changes  Modified the following requirements  3.2.9.1.3.2 Survey Text  CCO\_eCoaching\_Log\_Survey\_Questions.xlsx questions 2 and 3 follow up | Doug Stearns |
| 03/22/2016 | TFS2283 – eCL Overdue Training Report  Modified the following requirements  3.2.3.4 Training Reports  3.2.3.4.1 Feed File Layout  3.2.3.4.2 Location  3.2.3.4.3 Naming Convention  3.2.3.4.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.4.10 Description Text  3.2.5.1.4.2 Research Required | Doug Stearns |
| 03/22/2016 | TFS2283 – eCL Overdue Training Report  Modified the following requirements from review  3.2.5.1.4.2 Research Required  Table of Contents  3.2.3.4.3 Naming Convention | Doug Stearns |
| 03/24/2016 | TFS2283 – eCL Overdue Training Report  Modified the following requirements from testing  3.2.5.1.4.2 Research Required | Doug Stearns |
| 04/04/2016 | TFS2332 – eCL HR Access Solution  Modified the following requirements  3.2.1.2.16 Access to submission  3.2.4.1.1.1 Main Dashboard (My Dashboard)  3.2.4.1.1.2 Submitted Dashboard (My Submissions)  3.2.4.1.1.3 Historical (Historical Dashboard)  3.2.6.1.2 Employee Data Feed  3.2.6.1.2.1.1 File Location and Name  3.2.6.1.2.1.2 File Format and Layout | Doug Stearns |
| 04/11/2016 | TFS2470 – eCL Mass log load  3.2.3.5 Generic Reports  and child requirements 3.2.3.5.1 through 3.2.3.5.12 | Doug Stearns |
| 04/12/2016 | TFS2470 – eCL Mass log load  Updated from review  3.2.3.5.2 Location  3.2.3.5.3 Naming Convention | Doug Stearns |
| 04/14/2016 | TFS1709 – eCL Admin Tool  3.2.7.1.3 Inactivate Records  through  3.2.7.1.5.7 Warning Logs | Doug Stearns |
| 04/25/2016 | TFS1709 – eCL Admin Tool  3.2.2.6 Email Notification for Reactivated Logs  3.2.2.7 Email Notification for Reassigned Logs  3.2.6.1.3.1.1.1 Logging Information  3.2.6.1.3.2.1.1 Logging Information  3.2.7.1.3.1.2.1 Permissions for eCoaching Logs  3.2.7.1.3.1.2.2 Permissions for Warning Logs  3.2.7.1.4.1.1 List of Reasons for eCoachging Logs  3.2.7.1.4.1.2 List of Reasons for Warning Logs  3.2.7.1.4.2.1 Permissions for eCoaching and Warning Logs  3.2.7.1.4.3 Status of Log  3.2.7.1.5.2.1 Permissions for eCoaching | Doug Stearns |
| 05/14/2016 | TFS2668 – eCL Sub-reason text change  Updated the following requirements  3.2.1.6.7.1 Direct Coaching Reason and Sub-Reasons  3.2.1.6.7.2 Indirect Coaching Reason and Sub-Reasons  Changed text for reason Level One Metric and SLA-Pass Rate  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons  3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons  Added sub-reason Challenging Call to Recognition | Doug Stearns |
| 05/14/2016 | TFS2669 – eCL new OMR Sub-reason  CCO\_eCoaching\_Log\_FS.docx  updated the following requirements  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons  3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons  added OMR: Special Enrollment Period | Doug Stearns |
| 05/19/2016 | TFS1709 – eCL Admin Tool  Refinement of the following requirements  3.2.2.6.3 Email Subject  3.2.2.6.4 Email Message  3.2.2.7.2 Email Recipient  3.2.4.1.1.7 Reactivated logs  3.2.4.1.1.8 Reassigned logs  3.2.5.1.1.1.1 Coaching and Warning Logs  3.2.7.1.3.1.2.1 Permissions for eCoaching Logs  3.2.7.1.4.2.1 Permissions for eCoaching and Warning Logs  3.2.7.1.5.2.1 Permissions for eCoaching  3.2.7.1.5.4 Reassigned to | Doug Stearns |
| 06/01/2016 | TFS1709 – eCL Admin Tool  Additional refinement of the following requirements  3.2.7.1.3.1.2.1 Permissions for eCoaching Logs  3.2.7.1.3.1.4 Email notification  3.2.7.1.4.4 Email notification  3.2.7.1.5.2.1 Permissions for eCoaching | Doug Stearns |
| 06/01/2016 | TFS2268 – eCL Coach the Coach feed  Added the following requirements  3.2.3.6 Quality Reports  through  3.2.3.6.12 Email notification | Doug Stearns |
| 06/02/2016 | TFS1709 – eCL Admin Tool  Added the following requirements  3.2.7.1.3.1.2.3 Own Logs  3.2.7.1.4.2.1.1 Own Logs | Doug Stearns |
| 06/03/2016 | TFS2830 – eCL New OMR sub reason  Updated the following requirements  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons  3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 06/03/2016 | TFS2268 – eCL Coach the Coach feed  Added the following requirement  3.2.3.6.13 Other information | Doug Stearns |
| 06/08/2016 | TFS2332 – eCL HR Access Solution  Modified the following due to changes in requirements  3.2.1.2.16 Access to submission  3.2.4.1.1.1 Main Dashboard (My Dashboard)  3.2.4.1.1.2 Submitted Dashboard (My Submissions)  3.2.4.1.1.3 Historical (Historical Dashboard) | Doug Stearns |
| 06/08/2016 | TFS2268 – eCL Coach the Coach feed  Modified the following requirements  3.2.3.6.9 Report Details  3.2.3.6.10 Description Text | Doug Stearns |
| 06/13/2016 | TFS1709 – eCL Admin Tool  Updates from review  3.2.4.1.5 Supervisor Dashboard  3.2.4.1.6 Manager Dashboard  3.2.5.1.1.1.3 Examples  3.2.7.1.3.1.2.3 Own Logs  3.2.7.1.4.2.1.1 Own Logs | Doug Stearns |
| 06/23/2016 | TFS2268 – eCL Coach the Coach feed  Modified the following requirements  3.2.5.1.3.1 Acknowledgement  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.3 Supervisor Review | Doug Stearns |
| 06/27/2016 | TFS2268 – eCL Coach the Coach feed  Modified the following requirements  3.2.5.1.6 Other Reviewers | Doug Stearns |
| 06/30/2016 | TFS2268 – eCL Coach the Coach feed  Correction for Supervisor Review Information  3.2.5.1.6 Other Reviewers | Doug Stearns |
| 07/12/2016 | TFS3179 – eCL Kudos Data Feed and TFS3183 – eCL High Five CSAT  Modified the following requirements  3.2.2.3 Interface to Quality Systems eCoaching Logs  3.2.3.6.3 Naming Convention  3.2.3.6.5 Source  3.2.3.6.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.6.9 Report Details  3.2.3.6.11 eCoaching Log Status  3.2.3.6.12 Email notification  3.2.3.6.13 Other information  3.2.5.1.3.1 Acknowledgement  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.3 Supervisor Review | Doug Stearns |
| 07/18/2016 | TFS3170 – eCL Archive Coaching Logs  Added the following requirements:  3.2.7.1.6 Archive eCoaching Logs  And child requirements | Doug Stearns |
| 07/18/2016 | TFS3261 – eCL Completed Email  Added the following requirements  3.2.2.8 Email Notification for Completed Logs | Doug Stearns |
| 07/26/2016 | TFS3179 – eCL Kudos Data Feed  Modified the following requirements  3.2.3.6.9 Report Details  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.3.2.1 Link for KUD  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.1.1 Link for KUD | Doug Stearns |
| 07/29/2016 | TFS3440 – eCL Job Code Submission Permission  Modified the following requirements  3.2.1.3.15 Access to submission  3.2.1.4.15 Access to submission  3.2.1.5.15 Access to submission | Doug Stearns |
| 07/29/2016 | TFS3398 – eCL LCSAT Reassigned to Hierarchy Manager  Modified the following requirement  3.2.5.1.5.4 Hierarchy Manager | Doug Stearns |
| 08/01/2016 | TFS3179 – eCL Kudos Data Feed  Modified the following requirement  3.2.5.1.4.1 Acknowledgement | Doug Stearns |
| 08/08/2016 | TFS3441 – eCL Admin Inactive Emp/Sup/Mgr  Modified or added the following requirements  3.2.6.1.3.1.1 Employee Status  3.2.6.1.3.1.2 Missing Record  3.2.6.1.3.2.1 Employee Status  3.2.7.1.3.1.3.3 Status of Employees  3.2.7.1.4.5 Status of Employees  3.2.7.1.5.8 Status of Employees  3.2.7.1.5.9 Status of Supervisor/Manager | Doug Stearns |
| 08/12/2016 | TFS3179 – eCL Kudos Data Feed  Modified the following requirement  3.2.3.6.9 Report Details (for report code KUD) | Doug Stearns |
| 08/15/2016 | TFS3605 – eCL Add New Quality Sub-reason  Modified the following requirements  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons 3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 08/29/2016 | TFS3027 – eCL Senior Manger Dashboard  Modified or added the following requirements  3.2.4.1.1.6 Senior Managers  3.2.4.1.6 Manager Dashboard  3.2.4.1.6.1 Manager Dashboard Filters  3.2.4.1.10 Senior Manager Dashboard (and child requirements)  3.2.7.1.1.1.1 Role  3.2.7.1.1.1.1.3 Senior Managers | Doug Stearns |
| 09/15/2016 | TFS3972 – eCL Attendance Feed  Added or modified the following requirements:  3.2.3.5.3 Naming Convention  3.2.3.5.5 Source  3.2.3.5.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.5.9 Report Details  3.2.3.5.11 eCoaching Log Status  3.2.3.5.12 Email notification  3.2.3.5.13 Other information  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.3 Supervisor Review | Doug Stearns |
| 09/21/2015 | TFS3887 – eCL Admin tool permissions for Program  Updated the following requirements  3.2.1.3.15 Access to submission  3.2.1.4.15 Access to submission  3.2.1.5.15 Access to submission  3.2.1.6.15 Access to submission | Doug Stearns |
| 10/03/2016 | TFS4137 – eCL AHT to Call Efficiency  Updated the following requirements  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons 3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons 3.2.1.3.7.1 Direct Coaching Reason and Sub-Reasons  3.2.1.3.7.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 10/24/2016 | TFS4353 – eCL email reminder to reassigned reviewer  Updated the following requirements  3.2.2.5.3 Time Frame  3.2.2.5.5 Email Recipient | Doug Stearns |
| 10/28/2016 | TFS3757 – eCL Coaching Monitor  Updated the following requirements  CCO\_eCoaching\_Log\_FS.docx  3.2.4.1.10.5.1 Log Detail  inserted new number 9 and renumbered remaining  3.2.5.1.1.1.1 Coaching and Warning Logs  inserted new number 11 and renumbered remaining  3.2.5.1.1.1.3 Examples | Doug Stearns |
| 11/09/2016 | TFS3757 – eCL Coaching Monitor  Updated the following requirements with new screen shot  3.2.5.1.1.1.3 Examples | Doug Stearns |
| 11/10/2016 | TFS3757 – eCL Coaching Monitor  Updated the following requirements with new information  3.2.3.2.1.8 Existing records | Doug Stearns |
| 11/11/2016 | TFS3757 – eCL Coaching Monitor  Corrected the following requirement  3.2.3.2.1.8 Existing records | Doug Stearns |
| 11/17/2016 | TFS4718 – eCL Survey Default Radio Button  Added the following requirement  3.2.9.1.3.4.5 Default Responses | Doug Stearns |
| 11/17/2016 | TFS3027 – eCL Sr Mgr Dashboard  Updated the following based on review  3.2.4.1.10.3.1 eCoaching Log Pending Status  3.2.4.1.10.3.3 Warning Log Active State  3.2.4.1.10.4.3 Detail Filter | Doug Stearns |
| 11/30/2016 | TFS3027 – eCL Sr Mgr Dashboard  Updated the following based on testing  3.2.4.1.10 Senior Manager Dashboard  3.2.4.1.10.1.1 Time Frame  3.2.4.1.10.5.1 Log Detail (number 17) | Doug Stearns |
| 12/02/2016 | TFS3027 – eCL Sr Mgr Dashboard  Updated the following with type and minor text changes for clarification  3.2.4.1.10.1.1 Time Frame  3.2.4.1.10.3.2 eCoaching Log Completed Status  3.2.4.1.10.4.1 eCoaching Logs  3.2.4.1.10.4.2 Warning Logs  3.2.4.1.10.5.1 Log Detail | Doug Stearns |
| 12/06/2016 | TFS3170 – eCL Archive coaching logs automation  Due to decision to not automate archive process, updating the following requirements  3.2.7.1.6.3 Schedule | Doug Stearns |
| 12/08/2016 | TFS4916 – eCL Generic Feed  Updated the following requirements  3.2.3.5.5 Source  3.2.3.5.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.5.9 Report Details  3.2.3.5.10 Description Text  3.2.3.5.11 eCoaching Log Status  3.2.3.5.12 Email notification  3.2.3.5.13 Other information | Doug Stearns |
| 12/13/2016 | TFS4916 – eCL Generic Feed  Additional requirements updates  3.2.3.5.13 Other information | Doug Stearns |
| 01/06/2017 | TFS5149 – eCL Requirement Document Cleanup  Updated the following requirements  3.2.3.4.1 Feed File Layout (removed reference to SDR doc) | Doug Stearns |
| 01/31/2017 | TFS5309 – eCL New feed from Quality  Updated the following requirements  3.2.3.6.3 Naming Convention  3.2.3.6.5 Source  3.2.3.6.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.6.9 Report Details  3.2.3.6.11 eCoaching Log Status  3.2.3.6.12 Email notification  3.2.3.6.13 Other information | Doug Stearns |
| 01/31/2017 | TFS5365 – eCL WPOP80 access to historical dashboard  Updated the following requirement  3.2.4.1.1.3 Historical (Historical Dashboard) – added WPOP\* to list for access | Doug Stearns |
| 02/06/2017 | TFS5421 – eCL Monthly Summary Reports  Added the following requirements  3.2.8.1.2 Log Reporting  3.2.8.1.2.1x Report Results  3.2.8.1.2.2x Permissions  3.2.8.1.2.3x Notifications  3.2.8.1.2.4 x eCL Module Summary  7.0 Appendix  7.1 Reporting Data Elements  Table of Contents | Doug Stearns |
| 02/10/2017 | TFS5420 – eCL Reporting Permissions Infrastructure  Added the following requirements  3.2.8.1.2.2.1.1 Individuals  3.2.8.1.2.2.1.2 User access level  3.2.8.1.2.2.1.3 Encryption  3.2.8.1.2.2.2.1 Individuals  3.2.8.1.2.2.2.2 User access | Doug Stearns |
| 02/20/2017 | TFS5649 – eCL NPN text from database  Updated the following requirements  3.2.3.6.9 Report Details  3.2.3.6.10 Description Text | Doug Stearns |
| 02/21/2017 | TFS5641 – eCL Delete log from Admin Tool  Updated the following requirements  3.2.7.1.2.1 Application | Doug Stearns |
| 02/21/2017 | TFS5642 – eCL ACL from Admin Tool  Updated the following requirements  3.2.7.1.1.1.1.3 Senior Managers | Doug Stearns |
| 02/22/2017 | TFS5653 – eCL NPN log from existing coaching log  Added the following requirements  3.2.10 eCoaching Log Generation  3.2.10.1 Quality Log Generation  and child requirements  Modified the following requirements  3.2.3.6.3 Naming Convention  3.2.3.6.5 Source  3.2.3.6.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.6.9 Report Details  3.2.3.6.10 Description Text  3.2.3.6.11 eCoaching Log Status  3.2.3.6.12 Email notification  3.2.3.6.13 Other information | Doug Stearns |
| 02/22/2017 | TFS5642 – eCL ACL from Admin Tool  Corrected the following requirement  3.2.7.1.1.1.1.2 Advanced Resolution Center | Doug Stearns |
| 02/22/2017 | TFS5621 – eCL Ad Hoc Reporting  Added the following requirements  3.2.8.1.2.5 eCL Ad Hoc Coaching Log Summary  through  3.2.8.1.2.8 eCL Administration Activity Summary  including child requirements  7.2 Reporting Warning Data Elements  7.3 Reporting Hierarchy Data Elements  7.4 Reporting Admin Activity Data Elements | Doug Stearns |
| 03/01/2017 | TFS5642 – eCL ACL from Admin Tool  Added the following requirement  3.2.7.1.1.1.1.4 Access Control Administrator | Doug Stearns |
| 03/02/2017 | TFS5756 – eCL WPPM50 Admin Tool Access  Updated the following requirement  3.2.7.1.3.1.2.1 Permissions for eCoaching Logs  3.2.7.1.5.2.1 Permissions for eCoaching | Doug Stearns |
| 03/03/2017 | TFS5653 – eCL NPN log from existing coaching log  Update the following requirement  3.2.10.1.1 Selection of logs | Doug Stearns |
| 03/07/2017 | TFS5421 – eCL Module Summary Reports  Modified the following requirements  3.2.8.1.2.1.1.2 Name  3.2.8.1.2.4.1.2 On Demand Reports  3.2.8.1.2.5.1.2 On Demand Reports  3.2.8.1.2.6.1.2 On Demand Reports  3.2.8.1.2.8.1.2 On Demand Reports  7.1 Reporting Data Elements  7.2 Reporting Warning Data Elements  7.3 Reporting Hierarchy Data Elements  7.4 Reporting Admin Activity Data Elements | Doug Stearns |
| 03/13/2017 | TFS5621 – eCL Ad Hoc reporting  Modified the following requirement  3.2.8.1.2.5.1.2 On Demand Reports  3.2.8.1.2.6.1.2 On Demand Reports | Doug Stearns |
| 03/17/2017 | TFS5421 – eCL Summary Report and TFS5621 – eCL Ad Hoc reporting  Revised the following eCL reporting requirements based on feedback  Table of Contents  3.2.8.1.2 Log Reporting and child requirements | Doug Stearns |
| 03/31/2017 | TFS6145 – eCL Break Feeds  TFS6147 – eCL Performance Scorecard Feeds  Added or modified the following requirements  3.2.3.1.2 Generic Reports  3.2.3.1.4 Supervisor Review Reports  3.2.3.1.13 Coaching Reasons and Sub-Coaching Reasons  3.2.3.1.14.3 Supervisor Review Reports  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.3.2.2 Link for BRN, BRL  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.2 Research Required  3.2.5.1.4.2.3 Link for OMR BRN, BRL  3.2.5.1.4.3 Supervisor Review | Doug Stearns |
| 04/07/2017 | TFS5621 – eCL Additional Reporting  Modified the following requirements  3.2.8.1.2.4.1 Selection Criteria (added site)  7.3 Reporting Hierarchy Data Elements (removed module name and added Aspect fields) | Doug Stearns |
| 04/13/2017 | TFS6145 – eCL Break Feeds  Modified the following requirements for review text  3.2.5.1.3.2 Acknowledgement and feedback (removed text)  3.2.5.1.3.2.2 Link for BRN, BRL (removed requirement)  3.2.5.1.4.2 Research Required (added text)  3.2.5.1.4.2.3 Link for OMR BRN, BRL (added link) | Doug Stearns |
| 04/14/2017 | TFS6145 – eCL Break Feeds  Removed extra commas from review text  3.2.5.1.4.2 Research Required | Doug Stearns |
| 04/14/2017 | TFS6145 – eCL Break Feeds  Additional change for not coachable drop down  3.2.5.1.4.2 Research Required | Doug Stearns |
| 04/17/2017 | TFS6147 – eCL Performance Scorecard Feeds  Modified the following requirements  3.2.3.1.1 eCoaching Logs  3.2.3.1.9 Source  3.2.3.1.13 Coaching Reasons and Sub-Coaching Reasons  3.2.3.1.14.3 Supervisor Review Reports  3.2.5.1.3.2 Acknowledgement and feedback | Doug Stearns |
| 04/20/2017 | TFS6377 – eCL Break feed for QS and Sups  Modified the following requirements  3.2.3.1.1 eCoaching Logs  3.2.3.1.4 Supervisor Review Reports  3.2.3.1.5 OMR Feed File Layout  3.2.3.1.14.3 Supervisor Review Reports  3.2.5.1.3 Employee of Log  3.2.5.1.4 Supervisor of Record  3.2.5.1.5 Manager of Record | Doug Stearns |
| 05/01/2017 | TFS5642 – eCL ACL to Admin Tool  Modified the following requirements  3.2.7.1.1.1.1.4 Access Control Administrator (removed as not part of original functionality)  3.2.7.1.1.1.2 User LAN ID (changed to 3.2.7.1.1.1.2 User Site)  3.2.7.1.1.1.3 User Name (changed to selecting) | Doug Stearns |
| 05/02/2017 | TFS6521 – eCL URL for BRN & BRL  Modified the following requirements  3.2.5.1.4.2.3 Link for OMR BRN, BRL | Doug Stearns |
| 05/04/2017 | TFS6540 – eCL Break Static Text  Updated the following requirement  3.2.5.1.4.2 Research Required | Doug Stearns |
| 05/09/2017 | TFS6582 – eCL Quality Specialist coaching work flow  Modified the following requirements  3.2.1.2.14 Status of eCoaching Log  3.2.2.1.6.2 Completed | Doug Stearns |
| 05/12/2017 | TFS6623 – eCL Hierarchy File Data Check  Added the following requirement  3.2.6.1.2.3.4 No Employee Data | Doug Stearns |
| 05/16/2017 | TFS6616 – eCL Max Reasons Limit  Added the following requirement  3.2.1.1.7 Maximum Reasons | Doug Stearns |
| 05/22/2017 | TFS6612 – eCL Validate Assigned Manager  Modified the following requirement  3.2.3.1.16.1 Exception for LCS | Doug Stearns |
| 05/31/2017 | TFS6147 – eCL Performance Scorecard Feeds  Modified the following requirements  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.3.2.2 Link for MSR  3.2.5.1.3.2.3 Links for MSRS  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.1.2 Link for MSR  3.2.5.1.4.1.3 Links for MSRS | Doug Stearns |
| 06/01/2017 | TFS6881 – eCL IAE Not Coachable Reasons  Modified the following  3.2.5.1.4.2 Research Required (number 9)  3.2.5.1.4.3 Supervisor Review | Doug Stearns |
| 06/02/2017 | TFS6147 – eCL Performance Scorecard Feeds  Corrected minor typos in  3.2.5.1.3.2.2 Link for MSR  3.2.5.1.3.2.3 Links for MSRS  3.2.5.1.4.1.2 Link for MSR  3.2.5.1.4.1.3 Links for MSRS | Doug Stearns |
| 07/06/2017 | TFS7152 – eCL Inactivate Completed Logs  Modified the following  3.2.7.1.3.1.3.1 Status of eCoaching Logs  3.2.7.1.3.1.3.2 Status of Warning Logs | Doug Stearns |
| 07/20/2017 | TFS7174 – eCL New ETS Feeds  Modified or added the following requirements  3.2.2.4.1.1 CSR Module  3.2.3.3.1.1 ETS Reports for CSRs  3.2.3.3.4 Naming Convention  3.2.3.3.5.4 Date of Coaching  3.2.3.3.5.5 Coaching Reasons and Sub-Coaching Reasons  3.2.3.3.5.6 Report Details  3.2.3.3.5.6.2.9 High Number of Changes Description Text  3.2.3.3.5.6.2.10 Incorrect Change Category Description Text  3.2.3.3.5.8 Email notification  3.2.3.3.5.10 Invalid Records Not Processed  3.2.5.1.4.3 Supervisor Review  3.2.5.1.4.3.1 Link for ETS HNC, ICC | Doug Stearns |
| 07/26/2017 | TFS7174 – eCL New ETS Feeds  Modified or added the following requirements  3.2.3.3.1.1 ETS Reports for CSRs  3.2.3.3.1.2 ETS Reports for CSRs and Supervisor  3.2.3.3.1.3 ETS Reports for Supervisors | Doug Stearns |
| 08/04/2017 | TFS7541 – eCL ATA evaluations from IQS  Modified the following  3.2.3.2 Interface to Quality Systems  3.2.3.2.1 eCoaching Logs  3.2.3.2.1.6 Scorecard Types  3.2.3.2.5 Source  3.2.3.2.9 Coaching Reasons and Sub-Coaching Reasons | Doug Stearns |
| 08/06/2017 | TFS7541 – eCL ATA evaluations from IQS  Modified the following  3.2.3.2 Interface to Quality Systems | Doug Stearns |
| 08/11/2017 | TFS7646 – eCL Discrepancy Feed  Modified or added the following  3.2.2.5.2 Selection Criteria  3.2.2.5.3 Time Frame  3.2.2.5.5 Email Recipient  3.2.3.7 Operations Reports and child requirements | Doug Stearns |
| 08/24/2017 | TFS7646 – eCL Discrepancy Feed  The following remained unchanged from earlier update  3.2.2.5.2 Selection Criteria  3.2.2.5.3 Time Frame  3.2.2.5.5 Email Recipient  Modified the following  3.2.3.5.3 Naming Convention  3.2.3.5.4 Invalid Records Not Processed  3.2.3.5.5 Source  3.2.3.5.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.5.9 Report Details  3.2.3.5.10 Description Text  3.2.3.5.11 eCoaching Log Status  3.2.3.5.12 Email notification  3.2.3.5.13 Other information  3.2.5.1.3.2 Acknowledgement and feedback  3.2.5.1.4.1 Acknowledgement  3.2.5.1.4.3 Supervisor Review  Removed the following  3.2.3.7 Operations Reports and child requirements | Doug Stearns |
| 09/07/2017 | TFS7854 – eCL Encrypt Feed Files  Modified or added the following requirements  Table of Contents  3.2.11 Secure Sensitive eCoaching Information  3.2.11.1 Feed Files  3.2.11.1.1 Processing  3.2.11.1.2 File Retention  3.2.11.2 Temporary Tables  3.2.11.2.1 Data Retention | Doug Stearns |
| 09/08/2017 | TFS8228 – eCL Reused Emp IDs  Modified the following requirement  3.2.6.1.2.3.2 Reused Employee Information | Doug Stearns |
| 09/11/2017 | TFS7854 – eCL Encrypt Feed Files  Modified the following  3.2.3.1.7 Naming Convention  3.2.3.2.4 Naming Convention  3.2.3.3.4 Naming Convention  3.2.3.4.3 Naming Convention  3.2.3.5.3 Naming Convention  3.2.3.6.3 Naming Convention  3.2.6.1.2.1.1 File Location and Name  3.2.6.1.2.2.1 File Location and Name | Doug Stearns |
| 09/13/2017 | TFS7646 – eCL Discrepancy Feed  Modified the following based on developer’s feedback  3.2.2.5.3 Time Frame | Doug Stearns |
| 09/14/2017 | TFS7646 – eCL Discrepancy Feed  Modified the following based on developer’s feedback  3.2.2.5.5 Email Recipient  3.2.2.5.7 Email Message | Doug Stearns |
| 09/20/2017 | TFS8228 – eCL Reused Emp IDs Issues  Added the following  3.2.6.1.2.3.5 Preferred Name | Doug Stearns |
| 09/22/2017 | TFS7136 – eCL New Architecture Submissions  Reformatted as headings for table of contents  and renumbered child requirements as needed  3.2.4 Dashboard Display  3.2.5 eCoaching Log Review  3.2.6 Employee Information  3.2.7 Administration Functions  3.2.8 eCoaching Log Reporting  3.2.9 eCoaching CSR Survey | Doug Stearns |
| 10/09/2017 | TFS7856 – eCL Encrypt Database columns  Added the following  3.2.11.3 Database Columns  3.2.11.3.1 Other employee information  3.2.11.3.2 User entered comments | Doug Stearns |
| 10/12/2017 | TFS8597 – eCL DTT Feed Changes  Modified the following  3.2.2.5.3 Time Frame  3.2.2.5.5 Email Recipient  3.2.3.5.11 eCoaching Log Status  3.2.3.5.12 Email notification  3.2.3.5.13 Other information  3.2.5.3.2 Acknowledgement and feedback (nos 5,6,7,9)  3.2.5.4.1 Acknowledgement (and no 6)  3.2.5.4.3 Supervisor Review | Doug Stearns |
| 10/12/2017 | TFS8597 – eCL DTT Feed Changes  Modified the following  3.2.2.1.2 Pending Employee Review | Doug Stearns |
| 10/13/2017 | TFS6066 – eCL Scheduled Reports  Modified the following based on additional information  3.2.8.2.6.1.1 Location  3.2.8.2.6.1.2 Name  3.2.8.2.7.1 eCL Coaching Log Monthly Summary  7.1 Reporting Data Elements | Doug Stearns |
| 10/17/2017 | TFS8747 – eCL Update for ETS email text  Modified the following  3.2.2.4.2.1 Pending Supervisor Review | Doug Stearns |
| 11/10/2017 | TFS8974 – eCL New Columns for People Soft file  Modified the following  3.2.6.2.1.1 File Location and Name  3.2.6.2.2.1 File Location and Name | Doug Stearns |
| 11/13/2017 | TFS8793 – eCL BRL/BRN feed for non-exempt  Added or modified the following  Table of Contents  3.2.1.1 eCoaching Log Modules  3.2.1.5.1 Display LSAs  3.2.1.6.1 Display Trainers  3.2.1.7 Administration Module  3.2.1.8 Analytics Reporting Module  3.2.1.9 Production Planning Module  3.2.1.10 Program Analyst Module  3.2.2.2 Outlier Management Reporting eCoaching Logs  3.2.2.2.3.2 Substitutions  3.2.2.5.5 Email Recipient  3.2.3.1.1 eCoaching Logs  3.2.3.1.15 eCoaching Log Status  3.2.4.1.1 Main Dashboard (My Dashboard)  3.2.4.1.2 Submitted Dashboard (My Submissions)  3.2.4.1.3 Historical (Historical Dashboard)  3.2.4.4 Employee Dashboard  3.2.4.5 Supervisor Dashboard  3.2.4.6 Manager Dashboard  3.2.6.1 Employee Information | Doug Stearns |
| 11/27/2017 | TFS8793 – eCL BRL/BRN feed for non-exempt  Modified the following for dashboard and review  3.2.4.1.1 Main Dashboard (My Dashboard)  3.2.4.1.2 Submitted Dashboard (My Submissions)  3.2.4.1.3 Historical (Historical Dashboard)  3.2.4.6 Manager Dashboard  3.2.4.8 Support Staff Dashboard | Doug Stearns |
| 11/28/2017 | TFS9091 – eCL New sub-coaching reason  Modified the following  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons  3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons  3.2.1.3.7.1 Direct Coaching Reason and Sub-Reasons  3.2.1.3.7.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 12/29/2017 | TFS9553 -eCoaching - update documentation to show new OMR report code IAEF  3.2.2.2.3.1 Exception for IAE, IAT, IAEF  3.2.3.1.4 Supervisor Review Reports  3.2.3.1.13 Coaching Reasons and Sub-Coaching Reasons  3.2.3.1.15 eCoaching Log Status  3.2.5.4.2 Research Required  3.2.5.4.2.2 SOP Link for OMR IAE, IAEF, or IA | Brian Coughlin |
| 12/29/2017 | TFS9573 -eCoaching - Add new SubCoaching Reason to Supervisor Module  3.2.1.3.7.1 Direct Coaching Reason and Sub-Reasons  3.2.1.3.7.2 Indirect Coaching Reason and Sub-Reasons | Brian Coughlin |
| 01/22/2018 | TFS9204 – eCL Inactivated Records from IQS  Modified the following requirements  3.2.3.2.1.3 Evaluation Status  3.2.3.2.1.8 Existing records  3.2.3.2.11 eCoaching Log Status | Doug Stearns |
| 01/22/20018 | TFS9511 – eCL Pilot Survey Question  Added or modified the following requirements  3.2.9.1.3 Specific Logs  3.2.9.3.4.2 Survey Questions | Doug Stearns |
| 04/06/2018 | TFS10524 – eCL feed file share move  Modified the following requirements  3.2.3.1.6 Location  3.2.3.2.3 Location  3.2.3.3.3 Location  3.2.3.4.2 Location  3.2.3.5.2 Location  3.2.3.6.2 Location  3.2.6.2.1.1 File Location and Name  3.2.6.2.2.1 File Location and Name  3.2.8.2.6.1.1 Location | Doug Stearns |
| 04/13/2018 | TFS10604 – eCL Updates from Peer Review  Modified the following requirements  3.2.1.1.3 Authentication  3.2.1.1.6 Form Name  3.2.2.1.6.2 Completed for Quality Specialist Coaching  3.2.3.2.1.5 Schedule  3.2.5.1.1.3 Examples  3.2.6.1.1 Employee Hierarchy  3.2.6.2.1.3 Load Schedule  3.2.8.2.7 Reports to be Scheduled | Doug Stearns |
| 05/30/2018 | TFS7136 – eCL New Architecture Submissions  Added or modified the following requirements  Table of contents  2.1.2 User Interfaces  3.2.1.2.12 Associated with a Call Record  3.2.1.3.11 Associated with a Call Record  3.2.1.3.15 Access to submission  3.2.1.4.11 Associated with a Call Record  3.2.1.4.15 Access to submission  3.2.1.5.15 Access to submission  3.2.1.6.11 Associated with a Call Record  3.2.1.6.15 Access to submission  3.2.2.1.1 General Format  3.2.4.1.3 Historical (Historical Dashboard)  3.2.4.1.9 Pending graph  3.2.4.3 Dashboard Filter Values  3.2.4.4 Employee Dashboard  3.2.4.4.1 Employee Dashboard Filters  3.2.4.5 Supervisor Dashboard  3.2.4.5.1 Supervisor Dashboard Filters  3.2.4.6 Manager Dashboard  3.2.4.6.1 Manager Dashboard Filters  3.2.4.7 Quality/Training/Employee Dashboard  3.2.4.7.1 Quality/Training/Employee Dashboard Filters  3.2.4.8 Support Staff Dashboard  3.2.4.8.1 Support Staff Dashboard Filters  3.2.4.9 Historical Reporting Dashboard  3.2.4.9.1 Historical Reporting Dashboard Filters  3.2.4.11x Director Dashboard (and child requirements)  3.2.5.1.3.1 Examples  3.2.5.3 Employee of Log  3.2.5.6 Other Reviewers  3.2.7.1.1.1 Role  3.2.7.1.1.1.3 Director level employees  3.2.11.4 Web Browser Session  3.2.11.4.1 Session Timeout | Doug Stearns |
| 07/10/2018 | TFS11500 – eCL New OMR Sub Reason  Modified the following requirement  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons  3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 07/20/2018 | TFS11451 – eCL New OMR PBH Feed  Added or modified the following requirements  3.2.1.2.8.1 Direct Coaching Reason and Sub-Reasons  3.2.1.2.8.2 Indirect Coaching Reason and Sub-Reasons  3.2.3.1.2 Generic Reports  3.2.3.1.4 Supervisor Review Reports  3.2.3.1.13 Coaching Reasons and Sub-Coaching Reasons  3.2.3.1.15 eCoaching Log Status  3.2.5.3.2 Acknowledgement and feedback  3.2.5.4.1 Acknowledgement  3.2.5.4.2 Research Required  3.2.5.4.2.3 Link for OMR BRL, BRN  3.2.5.4.3 Supervisor Review | Doug Stearns |
| 08/17/2018 | TFS11809 – eCL Maintenance Page  Added the following requirement  3.2.1.1.8 Maintenance Page | Doug Stearns |
| 08/20/2018 | TFS11743 – eCL Limit Export to Excel  Added the following requirements (note: needed to correct the hierarchy because had 2 labeled 3.2.4.11.3.1)  3.2.4.11.3.3.1 Export to Excel Limit  3.2.4.9.2.1 Extract Limit | Doug Stearns |
| 08/24/2018 | TFS11863 – eCL Admin Tool Maintenance Page  Added the following requirements  3.2.7.7 Admin Tool Application  3.2.7.7.1 Maintenance Page | Doug Stearns |
| 09/07/2018 | TFS11967 – eCL Share Point Support Link  Added the following requirements  3.2.1.1.9 Support Link  3.2.7.7.2 Support Link | Doug Stearns |
| 09/07/2018 | TFS12027 – eCL Employee ID Case  Added the following requirement  3.2.6.2.3.6 Case Insensitivity | Doug Stearns |
| 10/04/2018 | TFS12308 – eCL New Warning Sub-reasons  Modified the following requirements  3.2.1.2.8.3 Direct Warning Reason and Sub-Reasons  3.2.1.3.7.3 Direct Warning Reason and Sub-Reasons  3.2.1.4.7.3 Direct Warning Reason and Sub-Reasons  3.2.1.5.7.3 Direct Warning Reason and Sub-Reasons  3.2.1.6.7.3 Direct Warning Reason and Sub-Reasons | Doug Stearns |
| 10/10/2018 | TFS12320 – eCL Add Coach-the-Coach Sub-reason  Modified the following requirements  3.2.1.3.7.1 Direct Coaching Reason and Sub-Reasons  3.2.1.3.7.2 Indirect Coaching Reason and Sub-Reasons | Doug Stearns |
| 10/15/2018 | TFS12316 – eCL Historical Dashboard Access for Analysts  Modified the following requirement  3.2.4.1.3 Historical (Historical Dashboard) | Doug Stearns |
| 10/30/2018 | TFS12467 – eCL Manager Role for WPPM job code  Modified the following requirements  3.2.1.3.15 Access to submission  3.2.1.4.15 Access to submission  3.2.1.5.15 Access to submission  3.2.1.6.15 Access to submission  3.2.4.1.1 Main Dashboard (My Dashboard)  3.2.4.1.2 Submitted Dashboard (My Submissions)  3.2.4.1.3 Historical (Historical Dashboard) | Doug Stearns |
| 10/30/2018 | TFS12473 – eCL Admin Tool User access for Mark  Added the following requirement  3.2.7.1.3 Permissions for User Access Control List | Doug Stearns |
| 10/31/2018 | TFS12467 – eCL Manager Role for WPPM job code  Modified the following from feedback  3.2.4.1.3 Historical (Historical Dashboard) | Doug Stearns |
| 11/05/2018 | TFS12526 – eCL IIS log reporting  Modified the following requirement by renumbering the hierarchy  Table of Contents  3.2.8.2x Log Reporting  Added the following requirements  3.2.8.2.1 Reports to be On Demand  3.2.8.2.1.6 eCL Internet Information Services Activity Log  3.2.8.2.1.6.1 Selection Criteria  3.2.8.2.1.6.2 Data Elements  7.5 Reporting Internet Information Services Activity Data Elements | Doug Stearns |
| 11/26/2018 | TFS12591 – eCL Quality Overturned Appeals  Modified the following requirements  3.2.3.6.1 Feed File Layout  3.2.3.6.3 Naming Convention  3.2.3.6.5 Source  3.2.3.6.8 Coaching Reasons and Sub-Coaching Reasons  3.2.3.6.9 Report Details  3.2.3.6.10 Description Text  3.2.3.6.11 eCoaching Log Status  3.2.3.6.12 Email notification  3.2.3.6.13 Other information  3.2.5.4.3 Supervisor Review | Doug Stearns |
| 11/27/2018 | TFS12526 – eCL IIS log reporting  Added or modified the following requirements  3.2.8.2.1.6.1 Selection Criteria  3.2.8.2.1.6.2 Data Elements  7.5 Reporting Internet Information Services Activity Data Elements | Doug Stearns |

# Table of Contents

Table of Contents 18

3.2 Software Project Introduction 21

3.2 Overview 21

1.2 Software Project Scope 21

1.3 References 21

1.3.1 Supporting Documents 21

1.3.2 Attachments 21

2.0 Overall Description 21

2.1 Software Product Perspective 21

2.1.1 System Interfaces 21

2.1.2 User Interfaces 21

2.1.3 Hardware Interfaces 22

2.1.4 Software Interfaces 22

2.1.5 Communications Interfaces 22

2.1.6 Memory Constraints 22

2.1.7 Operations 22

2.1.8 Site Adaptation Specifications 22

2.2 Software Product Functions 22

2.3 User Characteristics 22

2.4 Constraints 22

2.5 Assumptions and Dependencies 22

2.6 Priority 22

3.0 Specific Requirements 22

3.1 Interfaces 22

3.1.1 User Interfaces 22

3.1.2 Hardware Interfaces 22

3.1.3 Software Interfaces 23

3.1.4 Communications Interfaces 23

3.2 Functions 23

3.2.1 eCoaching Log Submission 23

**3.2.1.1** **eCoaching Log Modules** 23

**3.2.1.2** **Employee (CSR) Module** 24

**3.2.1.3** **Supervisor Module** 30

**3.2.1.4** **Quality Specialists Module** 36

**3.2.1.5** **Local System Administrator (LSA) Module** 40

**3.2.1.6** **Training Module** 44

**3.2.1.7** **Administration Module** 54

**3.2.1.8** **Analytics Reporting Module** 54

**3.2.1.9** **Production Planning Module** 54

**3.2.1.10 Program Analyst Module** 54

3.2.2 System Generated Emails 54

**3.2.2.1** **Notification of submitted eCoaching Logs** 54

**3.2.2.2** **Outlier Management Reporting eCoaching Logs** 56

**3.2.2.3** **Interface to Quality Systems eCoaching Logs** 57

**3.2.2.4** **Electronic Timekeeping System eCoaching Logs** 57

**3.2.2.5** **Email Reminder** 58

**3.2.2.6** **Email Notification for Reactivated Logs** 60

**3.2.2.7** **Email Notification for Reassigned Logs** 60

**3.2.2.8** **Email Notification for Completed Logs** 61

3.2.3 eCoaching Log Data Feeds 62

**3.2.3.1** **Outlier Management Reporting** 62

**3.2.3.2** **Interface to Quality Systems** 66

**3.2.3.3** **Electronic Timekeeping System** 68

**3.2.3.4** **Training Reports** 75

**3.2.3.5** **Generic Reports** 77

**3.2.3.6** **Quality Reports** 79

3.2.4 Dashboard Display 81

**3.2.4.1**  **Access to Dashboards** 81

**3.2.4.2**  **Inactive logs** 83

**3.2.4.3**  **Dashboard Filter Values** 83

**3.2.4.4**  **Employee Dashboard** 85

**3.2.4.5**  **Supervisor Dashboard** 85

**3.2.4.6**  **Manager Dashboard** 88

**3.2.4.7**  **Quality/Training/Employee Dashboard** 90

**3.2.4.8**  **Support Staff Dashboard** 91

**3.2.4.9**  **Historical Reporting Dashboard** 92

**3.2.4.10** **Senior Manager Dashboard** 93

**3.2.4.11** **Director Dashboard** 97

3.2.5 eCoaching Log Review 98

**3.2.5.1**  **All Reviewers** 98

**3.2.5.2**  **Submitter of Log** 100

**3.2.5.3**  **Employee of Log** 100

**3.2.5.4**  **Supervisor of Record** 103

**3.2.5.5**  **Manager of Record** 108

**3.2.5.6**  **Other Reviewers** 111

**3.2.5.7**  **Unauthorized reviewers** 112

3.2.6 Employee Information 112

**3.2.6.1**  **Employee Information** 112

**3.2.6.2**  **Employee Data Feed** 112

**3.2.6.3**  **Log Inactivation** 113

3.2.7 Administration Functions 114

**3.2.7.1**  **Access Control List** 114

**3.2.7.2**  **Delete Records** 115

**3.2.7.3**  **Inactivate Records** 115

**3.2.7.4**  **Re-activate Records** 116

**3.2.7.5**  **Reassign eCoaching Logs** 117

**3.2.7.6**  **Archive eCoaching Logs** 118

**3.2.7.7**  **Admin Tool Application** 119

3.2.8 eCoaching Log Reporting 119

**3.2.8.1**  **Historical Dashboard Extract** 119

**3.2.8.2**  **Log Reporting** 120

3.2.9 eCoaching CSR Survey 122

**3.2.9.1**  **Survey Selection** 122

**3.2.9.2**  **Notification** 123

**3.2.9.3**  **Survey Form** 124

**3.2.9.4**  **Information** 125

**3.2.9.5**  **Inactivation/Deletion** 125

**3.2.9.6**  **Survey Recipients** 125

3.2.10 eCoaching Log Generation 125

**3.2.10.1** **Quality Log Generation** 125

3.2.11 Secure Sensitive eCoaching Information 128

**3.2.11.1** **Feed Files** 128

**3.2.11.2** **Temporary Tables** 129

**3.2.11.3** **Database Columns** 129

**3.2.11.4** **Web Browser Session** 129

3.3 Performance Requirements 129

3.4 Design Constraints 129

3.5 Software System Attributes 129

4.0 Glossary 129

5.0 Index 129

6.0 Attachments 129

7.0 Appendix 130

7.1 Reporting Data Elements 130

7.2 Reporting Warning Data Elements 131

7.3 Reporting Hierarchy Data Elements 132

7.4 Reporting Admin Activity Data Elements 133

7.5 Reporting Internet Information Services Activity Data Elements 134

# Software Project Introduction

## Overview

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 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 SharePoint site establishes consistency and ease of use in our coaching notes process along with providing historical coaching data for all Employees.

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

## 1.2 Software Project Scope

N/A

## 1.3 References

N/A

### 1.3.1 Supporting Documents

N/A

### 1.3.2 Attachments

N/A

# 2.0 Overall Description

*.*

## 2.1 Software Product Perspective

N/A

### 2.1.1 System Interfaces

eCoaching log will interface with the following systems through data file feeds.

Interface to Quality Systems (performance scorecard data)

Outlier Management Reporting (various reporting data)

Electronic Timekeeping System (timecard data)

PeopleSoft (employee information)

Aspect (employee information)

eCoaching log also interfaces with GDIT Outlook email system.

### 2.1.2 User Interfaces

The default landing page for the eCoaching Log system shall be the following:

Production: https://f3420-mwbp11.vangent.local/coach/default.aspx

https://f3420-mwbp11.vangent.local/eCLAdmin/

Development and Test: https://f3420-mpmd01.vangent.local/coach3/default.aspx

https://f3420-mpmd01.vangent.local/eCLAdmin

### 2.1.3 Hardware Interfaces

N/A

### 2.1.4 Software Interfaces

N/A

### 2.1.5 Communications Interfaces

N/A

### 2.1.6 Memory Constraints

N/A

### 2.1.7 Operations

N/A

### 2.1.8 Site Adaptation Specifications

N/A

## 2.2 Software Product Functions

N/A

## 2.3 User Characteristics

N/A

## 2.4 Constraints

N/A

## 2.5 Assumptions and Dependencies

N/A

## 2.6 Priority

N/A

# 3.0 Specific Requirements

## 3.1 Interfaces

### 3.1.1 User Interfaces

N/A

### 3.1.2 Hardware Interfaces

N/A

### 3.1.3 Software Interfaces

N/A

### 3.1.4 Communications Interfaces

N/A

## 3.2 Functions

### 3.2.1 eCoaching Log Submission

#### **3.2.1.1 eCoaching Log Modules**

The eCoaching Log system shall consist of the following modules

Employee

Supervisor

Quality

LSA

Training

Administration

Analytics Reporting

Production Planning

Program Analyst

**3.2.1.1.1 Retention Period**

The coaching notes will be retained for 3 years.

**3.2.1.1.2 PII/PHI Data**

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

**3.2.1.1.3 Authentication**

Authentication to the eCoaching system 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.

**3.2.1.1.4 Hierarchy**

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

**3.2.1.1.5 Reviewer**

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.

**3.2.1.1.6 Form Name**

The form name for eCoaching Logs shall be concatenation of the following, separated by dashes:

eCL

Employee ID of the selected employee

Log ID generated by the system

Example eCL-654321-12345

**3.2.1.1.6.1 Unique**

The form name for eCoaching Logs shall be unique.

**3.2.1.1.7 Maximum Reasons**

The maximum number of coaching reasons that can be selected is 12.

**3.2.1.1.8 Maintenance Page**

Provide a landing page to indicate to users when eCoaching Log system is unavailable and under maintenance.

**3.2.1.1.9 Support Link**

Provide a link for each page to the following support site:

<https://cco.gdit.com/Resources/eCoaching/QSS/SitePages/Issue%20Tracker.aspx>

#### **3.2.1.2 Employee (CSR) Module**

eCoaching Logs will be submitted for Customer Service Representatives/Employees.

**3.2.1.2.1 Employee Site**

Display a list of sites or locations for Employees.

**3.2.1.2.1.1 Active Sites**

Only display active sites in the list.

**3.2.1.2.2 Display Employee**

Display a list of Employees for the select site that has the following job codes: WACS01, WACS02 and WACS03.

**3.2.1.2.2.1 Employee’s Supervisor**

Display the name of the supervisor for the selected Employee.

**3.2.1.2.2.2 Employee’s Manager**

Display the name of the manager for the selected Employee.

**3.2.1.2.3 Program**

Allow for selection of Program – Marketplace, Medicare, or N/A.

**3.2.1.2.4 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)

**3.2.1.2.5 Progressive Disciplinary Warning**

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.)

**3.2.1.2.6 Date of Coaching**

Allow for entry of a date for the log. Dates in the future are not allowed.

**3.2.1.2.6.1 Date of Coaching**

Allow for entry of the date of coaching when coaching is direct and not a warning.

**3.2.1.2.6.2 Date of Event**

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

**3.2.1.2.6.3 Date Warning Given**

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

**3.2.1.2.7 Customer Service Escalation**

Determine if coaching or event is a CSE.

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

**3.2.1.2.8 Coaching Reasons and Sub-Coaching Reasons**

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

**3.2.1.2.8.1 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** |
| ARC Issue | 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. |
| Attendance | Opportunity or Reinforcement | Attendance Improvement Discussion  ETS (note available for direct coaching only by supervisors and managers – WSAQ70, WACS40, WACS50, WACS60)  Other: Specify reason under coaching details. |
| Call Efficiency | Opportunity or Reinforcement | Appropriate use of hold  Keeping the call on task  Navigational efficiency  Non transfer opportunity  Over servicing the caller  Utilizing appropriate scripting  Other: Specify reason under coaching details. |
| CCO Process Procedure Issues | Opportunity or Reinforcement | Security and Privacy Incident  Other: Specify reason under coaching details. |
| Current Coaching Initiatives | Opportunity or Reinforcement | Short Duration Reporting  Other: Specify reason under coaching details. |
| Feedback | Opportunity or Reinforcement | Inappropriate NGD Feedback  Other: Specify reason under coaching details. |
| HR Guideline Issues | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| OMR / Exceptions | Opportunity or Reinforcement | 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: Invalid use of Attestation  OMR: Open Calls  OMR: Short Calls – Inbound  OMR: Short Calls – Outbound  OMR: Special Enrollment Period  Other: Specify reason under coaching details. |
| Quality | Opportunity or Reinforcement | Accuracy / Completeness  Admin Procedure  CSAT  Customer Service  Privacy  Supervisor Toolkit Initiative  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | Challenging Call  Other: Specify reason under coaching details. |
| Schedule Adherence | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Secure Floor Violations | 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  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. |

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

**3.2.1.2.8.2 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** |
| ARC Issue | 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. |
| Attendance | Opportunity or Reinforcement | Attendance Improvement Discussion  Other: Specify reason under coaching details. |
| Call Efficiency | Opportunity or Reinforcement | Appropriate use of hold  Keeping the call on task  Navigational efficiency  Non transfer opportunity  Over servicing the caller  Utilizing appropriate scripting  Other: Specify reason under coaching details. |
| CCO Process Procedure Issues | Opportunity or Reinforcement | Security and Privacy Incident  Other: Specify reason under coaching details. |
| Current Coaching Initiatives | Opportunity or Reinforcement | Short Duration Reporting  Other: Specify reason under coaching details. |
| Feedback | Opportunity or Reinforcement | Inappropriate NGD Feedback  Other: Specify reason under coaching details. |
| HR Guideline Issues | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| OMR / Exceptions | Opportunity or Reinforcement | 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: Invalid use of Attestation  OMR: Open Calls  OMR: Short Calls – Inbound  OMR: Short Calls – Outbound  OMR: Special Enrollment Period  Potential Hardship  Other: Specify reason under coaching details. |
| Quality | Opportunity or Reinforcement | Accuracy / Completeness  Admin Procedure  CSAT  Customer Service  Privacy  Supervisor Toolkit Initiative  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | Challenging Call  Other: Specify reason under coaching details. |
| Schedule Adherence | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Secure Floor Violations | 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  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. |

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

**3.2.1.2.8.3 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 | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**3.2.1.2.9 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.

**3.2.1.2.10 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.

**3.2.1.2.11 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

Quality Specialist Coaching

Supervisor Coaching

Training and Development

Verint Quality Monitoring

Walk-By

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

**3.2.1.2.12 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, at least 10 but not more than 19 digits

NGD ID – valid id is any letter or number with a dash, at least 9 but not more than 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.

**3.2.1.2.13 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.

**3.2.1.2.14 Status of eCoaching Log**

The status of the eCoaching log shall be as follows:

Completed when warning log is submitted

Pending Employee Review when coaching log is Direct and not CSE

Pending Manger Review when coaching log is Direct, CSE, and not Manager Coaching

Pending Employee Review when coaching log is Direct, CSE and Manager Coaching

Pending Supervisor Review when coaching log is Indirect and not CSE

Pending Manager Review when coaching log is Indirect and CSE

**3.2.1.2.15 Required entry fields**

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

eCoaching Module

Employee Site

Employee 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

**3.2.1.2.16 Access to submission**

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

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 – WH\* and included in HR Employee Information file will not have access

**3.2.1.2.17 No log to self**

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

**3.2.1.2.18 No Duplicate Warnings**

Do not allow duplicate warnings to be submitted.

**3.2.1.2.18.1 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

**3.2.1.2.18.2 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.”

#### **3.2.1.3 Supervisor Module**

eCoaching Logs will be submitted for Supervisors.

**3.2.1.3.1 Display Supervisors**

Display a list of Supervisors that have the following job codes: WACS40.

**3.2.1.3.1.1 Supervisor’s Supervisor**

Display the name of the supervisor for the selected Supervisor.

**3.2.1.3.1.2 Supervisor’s Manager**

Display the name of the manager for the selected Supervisor.

**3.2.1.3.2 Program**

Allow for selection of Program – Marketplace, Medicare, or N/A.

**3.2.1.3.3 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)

**3.2.1.3.4 Progressive Disciplinary Warning**

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.)

**3.2.1.3.5 Date of Coaching**

Allow for entry of a date for the log. Dates in the future are not allowed.

**3.2.1.3.5.1 Date of Coaching**

Allow for entry of the date of coaching when coaching is direct and not a warning.

**3.2.1.3.5.2 Date of Event**

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

**3.2.1.3.5.3 Date Warning Given**

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

**3.2.1.3.6 Customer Service Escalation**

Determine if coaching or event is a CSE.

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

**3.2.1.3.7 Coaching Reasons and Sub-Coaching Reasons**

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

**3.2.1.3.7.1 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 | Attendance Improvement Discussion  Other: Specify reason under coaching details. |
| Call Efficiency | Opportunity or Reinforcement | Appropriate use of hold  Keeping the call on task  Navigational efficiency  Non transfer opportunity  Over servicing the caller  Utilizing appropriate scripting  Other: Specify reason under coaching details. |
| CCO Process Procedure | Opportunity or Reinforcement | CCO Learning  CUP  Desk to Desk  Security and Privacy Incident  Supervisor Callback  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  Coach the Coach  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.

**3.2.1.3.7.2 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 | Attendance Improvement Discussion  Other: Specify reason under coaching details. |
| Call Efficiency | Opportunity or Reinforcement | Appropriate use of hold  Keeping the call on task  Navigational efficiency  Non transfer opportunity  Over servicing the caller  Utilizing appropriate scripting  Other: Specify reason under coaching details. |
| CCO Process Procedure | Opportunity or Reinforcement | CCO Learning  CUP  Desk to Desk  Security and Privacy Incident  Supervisor Callback  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  Coach the Coach  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.

**3.2.1.3.7.3 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 | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**3.2.1.3.8 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.

**3.2.1.3.9 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.

**3.2.1.3.10 Identify Source for eCoaching Log**

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

Coach the Coach (Direct submissions only)

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.

**3.2.1.3.11 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, at least 10 but not more than 19 digits

NGD ID – valid id is any letter or number with a dash, at least 9 but not more than 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.

**3.2.1.3.12 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.

**3.2.1.3.13 Status of eCoaching Log**

The status of the eCoaching log shall be as follows:

Completed when warning log is submitted

Pending Sr Manger Review when coaching log is Direct and CSE

Pending Employee Review when coaching log is Direct and not CSE

Pending Manager Review when coaching log is Indirect and not CSE

Pending Sr Manager Review when coaching log is Indirect and CSE

**3.2.1.3.14 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

**3.2.1.3.15 Access to submission**

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

Supervisor / Other – WACS40, WFFA40, WMPR40, WPPM11, WPPT40, WPSM11, WPSM12, WPSM13, WPSM14, WPSM15, WTTI02. WTTR12, WTTR40, WPOP11, WPPM12, WACQ13

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

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

Others:

WPSM\* – Program Staff Systems Analyst

Employees designated by Program Manager

WISO\* – Software Engineer

WSTE\* – Testing Engineer

WPOP70 – Director, Operations

**3.2.1.3.16 No log to self**

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

**3.2.1.3.17 No Duplicate Warnings**

Do not allow duplicate warnings to be submitted.

**3.2.1.3.17.1 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

**3.2.1.3.17.2 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.”

#### **3.2.1.4 Quality Specialists Module**

eCoaching Logs will be submitted for Quality Specialists.

**3.2.1.4.1 Display Quality Specialists**

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

**3.2.1.4.1.1 Quality Specialist’s Supervisor**

Display the name of the supervisor for the selected Quality Specialist.

**3.2.1.4.1.2 Quality Specialist’s Manager**

Display the name of the manager for the selected Quality Specialist.

**3.2.1.4.2 Program**

Allow for selection of Program – Marketplace, Medicare, or N/A.

**3.2.1.4.3 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)

**3.2.1.4.4 Progressive Disciplinary Warning**

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.)

**3.2.1.4.5 Date of Coaching**

Allow for entry of a date for the log. Dates in the future are not allowed.

**3.2.1.4.5.1 Date of Coaching**

Allow for entry of the date of coaching when coaching is direct and not a warning.

**3.2.1.4.5.2 Date of Event**

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

**3.2.1.4.5.3 Date Warning Given**

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

**3.2.1.4.6 Customer Service Escalation**

Not available at this time.

**3.2.1.4.7 Coaching Reasons and Sub-Coaching Reasons**

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

**3.2.1.4.7.1 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.

**3.2.1.4.7.2 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.

**3.2.1.4.7.3 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 | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**3.2.1.4.8 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.

**3.2.1.4.9 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.

**3.2.1.4.10 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

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

**3.2.1.4.11 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, at least 10 but not more than 19 digits

NGD ID – valid id is any letter or number with a dash, at least 9 but not more than 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.

**3.2.1.4.12 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.

**3.2.1.4.13 Status of eCoaching Log**

The status of the eCoaching log shall be as follows:

Completed when warning log is submitted

Pending Employee Review when coaching log is Direct

Pending Quality Lead Review when coaching log is Indirect

**3.2.1.4.14 Required entry fields**

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

eCoaching Module

Quality Specialist Name

Program

Delivery Option

Date of coaching, event, or warning given

Progressive Disciplinary Warnings

Customer Service Escalation (if available)

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

**3.2.1.4.15 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, WPPM12, WPPM13

Supervisor / Lead – WACQ13, WACQ40

Manager – WSQA50, WEEX90, WEEX91, WEEXDV, WSQA70

Others:

WPSM\* – Program Staff Systems Analyst

Employees designated by Program Manager

WISO\* – Software Engineer

WSTE\* – Testing Engineer

WPOP70 – Director, Operations

**3.2.1.4.16 No log to self**

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

**3.2.1.4.17 No Duplicate Warnings**

Do not allow duplicate warnings to be submitted.

**3.2.1.4.17.1 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

**3.2.1.4.17.2 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.”

#### **3.2.1.5 Local System Administrator (LSA) Module**

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

**3.2.1.5.1 Display LSAs**

Display a list of LSAs regardless of site or location that has the following job codes: WIHD01, WIHD02, WIHD03, WIHD04, WABA11, WISA03.

**3.2.1.5.1.1 LSA’s Supervisor**

Display the name of the supervisor for the selected LSA.

**3.2.1.5.1.2 LSA’s Manager**

Display the name of the manager for the selected LSA.

**3.2.1.5.2 Program**

Not available at this time.

**3.2.1.5.3 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)

**3.2.1.5.4 Progressive Disciplinary Warning**

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.)

**3.2.1.5.5 Date of Coaching**

Allow for entry of a date for the log. Dates in the future are not allowed.

**3.2.1.5.5.1 Date of Coaching**

Allow for entry of the date of coaching when coaching is direct and not a warning.

**3.2.1.5.5.2 Date of Event**

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

**3.2.1.5.5.3 Date Warning Given**

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

**3.2.1.5.6 Customer Service Escalation**

Not available at this time.

**3.2.1.5.7 Coaching Reasons and Sub-Coaching Reasons**

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

**3.2.1.5.7.1 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.

**3.2.1.5.7.2 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.

**3.2.1.5.7.3 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 | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**3.2.1.5.8 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.

**3.2.1.5.9 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.

**3.2.1.5.10 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

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

**3.2.1.5.11 Associated with a Call Record**

Not available at this time.

**3.2.1.5.12 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.

**3.2.1.5.13 Status of eCoaching Log**

The status of the eCoaching log shall be as follows:

Completed when warning log is submitted

Pending Employee Review when coaching log is Direct

Pending Supervisor Review when coaching log is Indirect

**3.2.1.5.14 Required entry fields**

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

eCoaching Module

LSA Name

Delivery Option

Date of coaching, event, or warning given

Progressive Disciplinary Warnings

Customer Service Escalation (if available)

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

Verification

**3.2.1.5.15 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: WPSM\* – Program Staff Systems Analyst

Employees designated by Program Manager

WISO\* – Software Engineer

WSTE\* – Testing Engineer

WPPT40 – Supervisor, Project/Task

WPPT50 – Manager, Project/Task

WPPT60 – Sr Manager, Project/Task

WISA12 – Administrator, Systems

WPOP70 – Director, Operations

WIHD40 – Supervisor, Help Desk

WIHD50 – Manager, Help Desk

WABA11– Associate Administrator, Business

WEEXDV – Division Vice President

**3.2.1.5.16 No log to self**

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

**3.2.1.5.17 No Duplicate Warnings**

Do not allow duplicate warnings to be submitted.

**3.2.1.5.17.1 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

**3.2.1.5.17.2 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.”

#### **3.2.1.6 Training Module**

eCoaching Logs will be submitted for Trainers and Instructors.

**3.2.1.6.1 Display Trainers**

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

WTTR02 – Coordinator, Training

WTTI02 – Instructor

WTTR12 – Specialist, Training

WTTR13 – Sr Specialist, Training

WTID13 – Sr Developer, Instructional.

**3.2.1.6.1.1 Trainer’s Supervisor**

Display the name of the supervisor for the selected Trainer.

**3.2.1.6.1.2 Trainer’s Manager**

Display the name of the manager for the selected Trainer.

**3.2.1.6.2 Behavior**

Where was this behavior observed?

Production

Training

Other

**3.2.1.6.3 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)

**3.2.1.6.4 Progressive Disciplinary Warning**

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.)

**3.2.1.6.5 Date of Coaching**

Allow for entry of a date for the log. Dates in the future are not allowed.

**3.2.1.6.5.1 Date of Coaching**

Allow for entry of the date of coaching when coaching is direct and not a warning.

**3.2.1.6.5.2 Date of Event**

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

**3.2.1.6.5.3 Date Warning Given**

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

**3.2.1.6.6 Customer Service Escalation**

Determine if coaching or event is a CSE.

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

**3.2.1.6.7 Coaching Reasons and Sub-Coaching Reasons**

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

**3.2.1.6.7.1 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 | Metric – class  Metric – month  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 | Metric – class  Metric – month  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.

**3.2.1.6.7.2 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 | Metric – class  Metric – month  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 | Metric – class  Metric – month  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.

**3.2.1.6.7.3 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 | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Adherence  Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Quality/Performance – Failed Calls  Quality/Performance – Critical Fails  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**3.2.1.6.8 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.

**3.2.1.6.9 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.

**3.2.1.6.10 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

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

**3.2.1.6.11 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, at least 10 but not more than 19 digits

NGD ID – valid id is any letter or number with a dash, at least 9 but not more than 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.

**3.2.1.6.12 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.

**3.2.1.6.13 Status of eCoaching Log**

The status of the eCoaching log shall be as follows:

Completed when warning log is submitted

Pending Employee Review when coaching log is Direct and not CSE

Pending Manger Review when coaching log is Direct and CSE

Pending Supervisor Review when coaching log is Indirect and not CSE

Pending Manager Review when coaching log is Indirect and CSE

**3.2.1.6.14 Required entry fields**

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

eCoaching Module

Trainer Name

Behavior

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

Call record associated

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

How coaching was identified

Verification

**3.2.1.6.15 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

Others – WPSM\* Program Staff Systems Analyst

Employees designated by Program Manager

WISO\* – Software Engineer

WSTE\* – Testing Engineer

WPOP70 – Director, Operations

WEEXDV – Division Vice President

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

**3.2.1.6.16 No log to self**

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

**3.2.1.6.17 No Duplicate Warnings**

Do not allow duplicate warnings to be submitted.

**3.2.1.6.17.1 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

**3.2.1.6.17.2 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.”

#### **3.2.1.7 Administration Module**

eCoaching Logs will be submitted for the Administration team through feed files.

#### **3.2.1.8 Analytics Reporting Module**

eCoaching Logs will be submitted for the Analytics Reporting team through feed files.

#### **3.2.1.9 Production Planning Module**

eCoaching Logs will be submitted for the Production Planning team through feed files.

#### **3.2.1.10 Program Analyst Module**

eCoaching Logs will be submitted for the Program Analyst team through feed files.

### 3.2.2 System Generated Emails

#### **3.2.2.1 Notification of submitted eCoaching Logs**

System will generate emails when eCoaching Logs are submitted. The email notification informs them that they have an item to take action on.

**3.2.2.1.1 General Format**

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

|  |
| --- |
| 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 |

**3.2.2.1.2 Pending Employee Review**

When an eCoaching Log is submitted and the coaching is Direct or Indirect and is not a Customer Service Escalation and the status is Pending Employee Review, the employee 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.

**3.2.2.1.3 Pending Supervisor Review**

When an eCoaching Log is submitted and the coaching is Indirect and is not a Customer Service Escalation and the status is Pending Supervisor Review, the immediate supervisor of the Employee 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.

**3.2.2.1.3.1 Substitutions**

The following will be substituted for Pending Supervisor Review in the following modules:

|  |  |
| --- | --- |
| **Module** | **Substitution** |
| Supervisor | Pending Manager Review |
| Quality | Pending Quality Lead Review |

**3.2.2.1.4 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 manager of the employee 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.

**3.2.2.1.4.1 Substitutions**

The following will be substituted for Pending Manager Review in the following modules:

|  |  |
| --- | --- |
| **Module** | **Substitution** |
| Supervisor | Pending Sr. Manager Review |

**3.2.2.1.5 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 Sr. Manager Review, the immediate Sr. 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 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.

**3.2.2.1.5.1 Substitutions**

The following will be substituted for Pending Manager Review in the following modules:

|  |  |
| --- | --- |
| **Module** | **Substitution** |
| Supervisor | Pending Sr. Manager Review |

**3.2.2.1.6 No eMail**

**3.2.2.1.6.1 Progressive Disciplinary Warnings**

No email notification is sent for Progressive Disciplinary eCoaching Logs

**3.2.2.1.6.2 Completed for Quality Specialist Coaching**

Removed as no longer required.

#### **3.2.2.2 Outlier Management Reporting eCoaching Logs**

System will generate emails when eCoaching Logs are submitted through the Outlier Management Reporting (OMR) data feed. eCoaching Logs from OMR are considered to be Indirect.

**3.2.2.2.1 General Format**

The general format of eMails generated from OMR are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.2.2 Pending Employee Review**

The subject and message for OMR Pending Employee Review eMails are the same as described in Notification of Submitted eCoaching Logs Pending Employee Review except the condition will be Indirect instead of Direct.

**3.2.2.2.3 Pending Supervisor Review**

The condition, subject, and message for OMR Pending Supervisor Review eMails are the same as described in Notification of Submitted eCoaching Logs Pending Supervisor Review.

**3.2.2.2.3.1 Exception for IAE, IAT, IAEF**

When an eCoaching Log is submitted for an IAE (Inappropriate ARC Escalation), IAEF (Inappropriate ARC Escalation FFM) or IAT (Inappropriate ARC Transfer) report item, the status is Pending Supervisor Review, the Supervisor receives a system generated eMail notification.

Subject:

eCL: Pending Supervisor Review (<EMPLOYEE NAME>)

Message:

This eCoaching Log has been created in reference to an inappropriate escalation or transfer to the ARC. Please review and coach your CSR accordingly.

Where <EMPLOYEE NAME> is the name of the employee the coaching log is for.

**3.2.2.2.3.2 Substitutions**

The following will be substituted for Pending Supervisor Review in the following modules:

|  |  |
| --- | --- |
| **Module** | **Substitution** |
| Quality | Pending Quality Lead Review |
| Supervisor | Pending Manager Review |

**3.2.2.2.4 Pending Manager Review**

The condition, subject, and message for OMR Pending Manager eMails are the same as described in Notification of Submitted eCoaching Logs Pending Manager Review for Indirect logs.

**3.2.2.2.5 Pending Acknowledgement**

When an OMR eCoaching Log is submitted, the coaching is Indirect the status is Pending Acknowledgement, the employee receives a system generated eMail notification while the immediate supervisor is copied on the email.

Subject:

eCL: Pending Acknowledgement (<EMPLOYEE NAME>)

Message:

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 <**DATE**>. 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.

#### **3.2.2.3 Interface to Quality Systems eCoaching Logs**

System will generate emails when eCoaching Logs are submitted through the Interface to Quality Systems (IQS) or Quality Reports data feed. eCoaching Logs from IQS are considered to be Indirect in the CSR module only. Quality Reports eCoaching logs may be in the CSR or Supervisor module.

**3.2.2.3.1 General Format**

The general format of eMails generated from IQS are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.3.2 Pending Supervisor Review**

The condition, subject, and message for IQS Pending Supervisor Review eMails are the same as described in Notification of Submitted eCoaching Logs Pending Supervisor Review.

**3.2.2.3.3 Pending Manager Review**

The condition, subject, and message for IQS Pending Manager eMails are the same as described in Notification of Submitted eCoaching Logs Pending Manager Review for Indirect logs.

**3.2.2.3.4 Pending Acknowledgement**

The condition, subject, and message for IQS Pending Acknowledgement eMails are the same as described in Outlier Management Reporting eCoaching Logs Pending Acknowledgement.

#### **3.2.2.4 Electronic Timekeeping System eCoaching Logs**

System will generate emails when eCoaching Logs are submitted through the Electronic Timekeeping System (ETS) data feed. eCoaching Logs from ETS are considered to be Indirect in the CSR and Supervisor module.

**3.2.2.4.1 General Format**

The general format of eMails generated from ETS are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.4.1.1 CSR Module**

Email notifications for ETS data feed eCoaching Logs from report codes EOT, EA, HOL, ITD, ITI, FWH, HNC, ICC 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.

**3.2.2.4.1 .2 Supervisor Module**

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.

**3.2.2.4.2 Notification for Outstanding Action**

The general format of eMails generated from ETS are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.4.2.1 Pending Supervisor Review**

When an eCoaching Log is submitted for an OAE report item in the CSR module, 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 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.

**3.2.2.4.2.1.1 Substitutions**

The following will be substituted for Pending Supervisor Review in the following modules when the log is submitted an OAE or OAS report item:

|  |  |
| --- | --- |
| **Module** | **Substitution** |
| Supervisor | Pending Manager Review |

#### **3.2.2.5 Email Reminder**

System will generate emails when eCoaching Logs meeting the selection criteria have not yet been reviewed and coached.

**3.2.2.5.1 General Format**

The general format of eMails generated for reminders are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.5.2 Selection Criteria**

The eCoaching logs subject to reminders will those which meet the following criteria.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Source** | **Coaching Reason** | **Sub-Coaching Reason** | **Value** | **Status** |
| Verint-GDIT | Quality | Other: Specify reason under coaching details. | Did not meet goal | Pending Supervisor Review |
| OMR | OMR / Exceptions | OMR: Low CSAT | Research Required | Pending Manager Review |
| OMR | OMR / Exceptions | OMR: Low CSAT | Opportunity | Pending Supervisor Review |
| Empower | Attendance | Discrepancy Tracking | Opportunity | Pending Employee Review |

**3.2.2.5.3 Time Frame**

The eCoaching log reminder email will be sent using the following time frames:

|  |  |  |
| --- | --- | --- |
| **Source** | **First Reminder** | **Second Reminder** |
| Verint-GDIT | 48 hours after date/time initial email sent or reassignment date/time | 48 hours after date/time last email reminder sent or reassignment date |
| OMR | 72 hours after date/time initial email sent, manger review date, or reassignment date/time | 72 hours after date/time last email reminder sent or reassignment date |
| Empower | 48 hours after date/time initial email sent or reassignment date/time | 48 hours after date/time last email reminder sent |

Note: the maximum number of email reminders will be limited to two per reviewer/status. When a log is reassigned to a different reviewer, the email reminders count will be reset for the new reviewer.

**3.2.2.5.4 Email Priority**

The eCoaching log reminder email will be sent with High Importance setting.

**3.2.2.5.5 Email Recipient**

The eCoaching log reminder email will be sent to the following:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Source** | **Status** | **First Reminder To** | **First Reminder CC** | **Second Reminder To** | **Second Reminder CC** |
| Verint-GDIT | Pending Supervisor Review | Hierarchy Supervisor | Hierarchy Manager | Supervisor | Manager, Senior Manager |
| OMR | Pending Manager Review | Assigned Reviewing Manager | Senior Manager (supervisor of assigned reviewing manager) | Assigned Reviewing Manager | Senior Manager (supervisor of assigned reviewing manager) |
| OMR | Pending Supervisor Review | Hierarchy Supervisor | Hierarchy Manager | Hierarchy Supervisor | Hierarchy Manager, Hierarchy Senior Manager |
| Empower | Pending Employee Review | Recipient Supervisor | Hierarchy Supervisor | Recipient Supervisor | Hierarchy Supervisor, Hierarchy Manager |

Where

Assigned Reviewing Manager is the manager in the OMR LCS feed file assigned to review the log

Senior Manager (supervisor of assigned reviewing manger) is the reviewing manager’s immediate supervisor in the employee hierarchy table

Hierarchy Supervisor is the employee’s immediate supervisor in the employee hierarchy table

Hierarchy Manager is the employee’s manager in the employee hierarchy table

Hierarchy Senior Manager is the employee’s manager’s immediate supervisor in the employee hierarchy table

For Empower source reminders, the recipient of the email is a Supervisor, their hierarchy supervisor is a Manager, and their hierarchy manager is a Senior Manager

Note: when a log is reassigned to a different reviewer, the email reminders will be sent to the new reviewer.

**3.2.2.5.6 Email Subject**

The subject line of the email reminder will be the following:

Alert! eCoaching Log Past Due Follow-up: [FormID]

Where [FormID] represents the eCoaching Log form name.

**3.2.2.5.7 Email Message**

The message body of the email reminder will include the following:

[FormID] requires your attention. Please review and discuss with the employee.

The message body of the email reminder for source of Empower will include the following:

[FormID] requires your attention. Please review the log and take appropriate action.

Where [FormID] represents the eCoaching Log form name.

#### **3.2.2.6 Email Notification for Reactivated Logs**

System will generate emails when eCoaching Logs have been reactivated.

**3.2.2.6.1 General Format**

The general format of eMails generated when reactivated are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.6.2 Email Recipient**

The eCoaching log email will be sent to the appropriate employee, supervisor or manager in the current hierarchy depending on the status of the log when reactivated.

**3.2.2.6.3 Email Subject**

The subject line of the email will be the following:

eCoaching Log Reactivated

**3.2.2.6.4 Email Message**

The message body of the email will include the following:

The following eCoaching logs have been reactivated and require your attention.

[FormID]

Where [FormID] represents one or more eCoaching Log form names, each on a separate line.

Note: the text following the form ids listed (‘Please click here to open the coaching application and select the ‘My Dashboard’ tab to view the below form ID for details.’) will contain a link to the default eCoaching Log page.

**3.2.2.6.5 Warning Logs**

Reactivated Warning Logs will not send notification emails.

#### **3.2.2.7 Email Notification for Reassigned Logs**

System will generate emails when eCoaching Logs have been reassigned.

**3.2.2.7.1 General Format**

The general format of eMails generated when reassigned are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.7.2 Email Recipient**

The eCoaching log email will be sent to the person the log is being reassigned to. A Carbon Copy email will be sent to the person the log is being reassigned from.

**3.2.2.7.3 Email Subject**

The subject line of the email will be the following:

eCoaching Log Reassigned

**3.2.2.7.4 Email Message**

The message body of the email will include the following:

The following eCoaching Logs have been reassigned to you and require your attention. Please review and discuss with the employee.

[FormID]

Where [FormID] represents one or more eCoaching Log form names, each on a separate line.

Note: the text following the form ids listed (‘Please click here to open the coaching application and select the ‘My Dashboard’ tab to view the below form ID for details.’) will contain a link to the default eCoaching Log page.

#### **3.2.2.8 Email Notification for Completed Logs**

System will generate emails when eCoaching Logs have been completed.

**3.2.2.8.1 General Format**

The general format of eMails generated when completed are the same as those through Notification of Submitted eCoaching Logs.

**3.2.2.8.2 Email Recipient**

The eCoaching log email will be sent to the supervisor and manager in the hierarchy of the log’s recipient/owner.

**3.2.2.8.3 Email Subject**

The subject line of the email will be the following:

eCoaching Log Completed (<EMPLOYEE NAME>)

Where [EMPLOYEE NAME] is the name of the employee recipient/owner of the completed log.

**3.2.2.8.4 Email Message**

The message body of the email will include the following:

The following eCoaching Log has been completed. Please see the employee’s comments below:

[FormID]

[CSRComments]

Where [FormID] represents the eCoaching Log form name and [CSRComments] represents the text comments the employee submitted when completing the eCoaching Log.

**3.2.2.8.5 Module**

The completion notification will be for eCoaching log in the CSR module only.

**3.2.2.8.6 eCoaching Logs**

All eCoaching logs regardless of source, reason, sub-reason, or value will send email notification upon completion.

**3.2.2.8.7 Notification**

The email notification will be sent immediately when the log is submitted as complete.

### 3.2.3 eCoaching Log Data Feeds

#### **3.2.3.1 Outlier Management Reporting**

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.

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.

**3.2.3.1.1 eCoaching Logs**

The eCoaching Logs for OMR will be initiated in the Employee/CSR module except as described below:

|  |  |  |
| --- | --- | --- |
| **Report Code** | **Module** | **Condition** |
| BRL/BRN | CSR | When employee job code is WACS01, WACS02 or WACS03 |
| Quality | Quality Module when employee job code is WACQ02, WACQ03 or WACQ12. |
| Supervisor | When employee job code is WACS40 |
| LSA | When employee job code is WIHD01, WIHD02, WIHD03, WIHD04, WABA11, WISA03 |
| Training | When employee job code is WTTR02, WTTI02, WTTR12, WTTR13, WTID13 |
| Administration | When employee job code is WABA01, WABA02, WABA03 |
| Analytics Reporting | When employee job code is WPSM11 |
| Production Planning | When employee job code is WMPL02, WMPL03 |
| Program Analyst | When employee job code is WPPM11 |
| MSRS | Supervisor Module | When employee job code is WACS40 |

**3.2.3.1.2 Generic Reports**

The following are the generic OMR data feed reports.

|  |  |
| --- | --- |
| **OMR Report Code** | **Report** |
| ACO | OMR: Inappropriate ACO Escalation |
| ACW | OMR: ACW |
| AHT | OMR: AHT |
| CAN | OMR: Cancelled Calls |
| DFQ | OMR: Default Qualifiers |
| IDE | OMR: Inappropriate DME Escalation |
| IEE | OMR: Inappropriate EE/MM Escalation |
| INF | OMR: Inappropriate NGD Feedback |
| ISG | OMR: ISG Consults |
| ISQ | OMR: Short Calls Inbound |
| MSR | Monthly Scorecard Review |
| NIT | OMR: NGD Inappropriate Transfer |
| OPN | OMR: Open Calls |
| OSC | OMR: Short Calls Outbound |
| PBH | OMR: Potential Hardship |
| RME | OMR: Returned MAC Escalation |
| SLG | OMR: Scripts Logged |
| SPI | OMR: CCO Security and Privacy Incident Coaching |
| TR2 | OMR: FFM T2 Transfers |
| TRN | OMR: Transfers |

**3.2.3.1.3 Assigned Manager Review Reports**

The following is the OMR data feed reports for assignment to a specific assigned manger to review.

|  |  |
| --- | --- |
| **OMR Report Code** | **Report** |
| LCS | OMR: Low CSAT |

**3.2.3.1.4 Supervisor Review Reports**

The supervisor of record is the immediate supervisor of the employee recipient of the log regardless of job code or module the log is submitted in.

The following are the OMR data feed reports for assignment to the employee’s supervisor to review.

|  |  |
| --- | --- |
| **OMR Report Code** | **Report** |
| BRL | Exceed Break Length |
| BRN | Exceed Number of Breaks |
| IAE | OMR: Inappropriate ARC Escalation |
| IAEF | OMR: Inappropriate ARC Escalation FFM |
| IAT | OMR: Inappropriate ARC Transfers |
| MSRS | Monthly Scorecard Review – Supervisor |
| PBH | OMR: Potential Hardship |

**3.2.3.1.5 OMR Feed File Layout**

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

**3.2.3.1.6 Location**

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

\\F3420-ECLDBP01\data\Coaching\Outliers\Encrypt\_In

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\Outliers\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\Outliers\Encrypt\_In

**3.2.3.1.7 Naming Convention**

The file will have the following naming convention:

eCL\_Outlier Feed\_<ReportCode><YYYYMMDD>.csv

<ReportCode> represents the three character value from strReportCode

<YYYYMMDD> represents the Year, Month and Day

Note: the file will be encrypted and will have .zip.encrypt appended to the name

**3.2.3.1.8 Invalid Records Not Processed**

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

**3.2.3.1.9 Source**

The source of the coaching log shall be OMR except where described below:

|  |  |
| --- | --- |
| **Report Code** | **Source** |
| MSR | Performance Scorecard |
| MSRS | Performance Scorecard |

**3.2.3.1.10 Program**

The Program (Medicare or Marketplace) shall be determined from the input feed.

**3.2.3.1.11 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.3.1.12 Date of Coaching**

The date of coaching or event will be the Event Date from the input feed.

**3.2.3.1.13 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement shall be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **OMR Report Code** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| ACO | OMR/Exceptions | Research Required | OMR: Inappropriate ACO Escalation |
| ACW | OMR/Exceptions | Research Required | OMR: ACW |
| AHT | OMR/Exceptions | Research Required | OMR: AHT |
| BRL | Breaks | Research Required | Exceed Break Length |
| BRN | Breaks | Research Required | Exceed Number of Breaks |
| CAN | OMR/Exceptions | Research Required | OMR: Cancelled Calls |
| DFQ | OMR/Exceptions | Research Required | OMR: Default Qualifiers |
| IAE | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Escalation |
| IAEF | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Escalation FFM |
| IAT | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Transfers |
| IDE | OMR/Exceptions | Research Required | OMR: Inappropriate DME Escalation |
| IEE | OMR/Exceptions | Research Required | OMR: Inappropriate EE/MM Escalation |
| INF | OMR/Exceptions | Research Required | OMR: Inappropriate NGD Feedback |
| ISG | OMR/Exceptions | Research Required | OMR: ISG Consults |
| ISQ | OMR/Exceptions | Research Required | OMR: Short Calls Inbound |
| LCS | OMR/Exceptions | Research Required | OMR: Low CSAT |
| MSR | Current Coaching Initiatives | Reinforcement | Other: Specify reason under coaching details. |
| MSRS | Current Coaching Initiatives | Reinforcement | Other: Specify reason under coaching details. |
| NIT | OMR/Exceptions | Research Required | OMR: NGD Inappropriate Transfer |
| OPN | OMR/Exceptions | Research Required | OMR: Open Calls |
| OSC | OMR/Exceptions | Research Required | OMR: Short Calls Outbound |
| PBH | OMR/Exceptions | Opportunity | OMR: Potential Hardship |
| RME | OMR/Exceptions | Research Required | OMR: Returned MAC Escalation |
| SLG | OMR/Exceptions | Research Required | OMR: Scripts Logged |
| SPI | OMR/Exceptions | Research Required | OMR: CCO Security and Privacy Incident Coaching |
| TR2 | OMR/Exceptions | Research Required | OMR: FFM T2 Transfers |
| TRN | OMR/Exceptions | Research Required | OMR: Transfers |

**3.2.3.1.14 Report Details**

The report details will be determined from the input feed.

**3.2.3.1.14.1 Generic Reports**

The report details will be the text description from the input feed.

**3.2.3.1.14.2 Assigned Manager Review Reports**

The report details will be the text description from the input feed.

|  |  |
| --- | --- |
| **OMR Report Code** | **Preceding Sentence** |
| LCS | “The call associated with this Low CSAT is Verint ID:” |

Preceding sentence for LCS is followed by:

Text Description

**3.2.3.1.14.3 Supervisor Review Reports**

The report details shall be the following fields from the feed file concatenated together:

|  |  |
| --- | --- |
| **OMR Report Code** | **Preceding Sentence** |
| IAE | “You are receiving this eCL because the ARC received an Inappropriate Escalation for this CSR. Please review the Verint Call, NGD call record and coach as appropriate.” |
| IAEF | “You are receiving this eCL because the ARC received an Inappropriate Escalation for this CSR. Please review the Verint Call, NGD call record and coach as appropriate.” |
| IAT | “You are receiving this eCL because the ARC received an Inappropriate Transfer from this CSR. Please review the Verint Call, NGD call record and coach as appropriate.” |

Preceding sentence for IAE, IAEF and IAT are followed by:

Text Description

CD1

CD2

Each field separated by carriage

**3.2.3.1.14.4 Description Text**

Include the following text in the description for OMR eCoaching Logs:

<Report Details – concatenation of fields from report>

**3.2.3.1.15 eCoaching Log Status**

The status of the eCoaching Log will be determined as follows:

|  |  |  |
| --- | --- | --- |
| **OMR Report Code** | **Module** | **Status** |
| ACO, ACW, AHT, CAN, DFQ, IDE, IEE, INF, ISG, ISQ, LCS, NIT, OPN, OSC, RME, SLG, SPI, TR2, TRN | CSR | Pending Manager Review |
| BRL, BRN, IAE, IAEF, IAT, PBH | CSR | Pending Supervisor Review |
| MSR | CSR | Pending Acknowledgement |
| BRL, BRN | Supervisor | Pending Manger Review |
| MSRS | Supervisor | Pending Acknowledgement |
| BRL, BRN | Quality | Pending Quality Lead Review |
| BRL, BRN | LSA, Training, Analytics, Optimization, Project Admin, Quality Insight, Quality Systems, SWP, TCA, TCA Analyst | Pending Supervisor Review |

**3.2.3.1.16 Reviewer**

The current employee hierarchy will be used to determine the employee’s supervisor and manager.

**3.2.3.1.16.1 Exception for LCS**

For LCS (Low CSAT), the current employee hierarchy will be used to determine the employee’s supervisor. The manager who will review the log will be designated in the input feed. The assigned reviewer shall be an active employee on file and with the appropriate job code.

#### **3.2.3.2 Interface to Quality Systems**

Verint is the source system for quality eCoaching Logs. Some eCoaching Logs will be from Independent Quality Assurance (IQA). Others will be Audit the Auditor (ATA) evaluations for Quality Specialists. A Pending Acknowledgment flow will be used 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.

**3.2.3.2.1 eCoaching Logs**

The eCoaching Logs for IQS will be initiated in the CSR module except for those with ATA in the form name which will be initiated in the Quality module.

**3.2.3.2.1.1 Channel**

The IQS data file will contain records from each channel.

**3.2.3.2.1.2 Valid Dates**

Records will be included in the eCoaching Log Scorecard Data File when there is a valid Coaching Date or a valid Appeals End Date in the evaluation record.

**3.2.3.2.1.3 Evaluation Status**

Records will contain active and inactive evaluations. If an Inactive record is received and there is no matching coaching log, one will not be created.

**3.2.3.2.1.4 Encrypted**

The IQS data file will be encrypted.

**3.2.3.2.1.5 Schedule**

The IQS file will be sent on a daily basis, including holidays and weekends. If there are no new or changed records, the file should be empty.

**3.2.3.2.1.6 Scorecard Types**

Include the following Scorecard Types in the data file:

LimeSurvey (no longer receiving)

Verint-GDIT

Verint-GDIT Supervisor

Verint-TQC

Note: ATA records will be Verint-GDIT.

**3.2.3.2.1.7 Invalid Records Not Processed**

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

**3.2.3.2.1.8 Existing records**

Scorecards from the quality data feed which match an existing record in the system will not be loaded, but instead updated. Matching records are those which have the same Evaluation ID. Updated logs may be in any status. The fields to be updated are Opportunity/Reinforcement, Description, Coaching Monitor. The coaching log Status will also be updated to Inactive if the matching evaluation record’s Active Status is Inactive. There will be no change to the coaching log Status if the matching record’s Active Status is Active.

**3.2.3.2.2 IQS Feed File Layout**

CCO\_eCoaching\_Log\_IQS\_Layout.docx identifies the fields and layout for the IQS data feed. The data files will be a pipe (|) delimited file.

**3.2.3.2.3 Location**

IQS files will be placed in the following location to be processed:

\\F3420-ECLDBP01\data\Coaching\IQS\Encrypt\_In

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\IQS\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\IQS\Encrypt\_In

**3.2.3.2.4 Naming Convention**

The file will have the following naming convention:

eCL\_IQS\_Scorecard\_YYYYMMDD.csv

Where <YYYYMMDD> represents the Year, Month and Day

Note: the file will be encrypted and will have .zip.encrypt appended to the name

**3.2.3.2.5 Source**

The source of the coaching log shall be one of the following:

|  |  |
| --- | --- |
| **Source Value** | **Source of Information** |
| LimeSurvey | No longer receiving |
| Verint-GDIT | Verint scorecards with GDIT or ATA in form name |
| Verint-GDIT Supervisor | Verint scorecards with GDIT and Supervisor in form name |
| Verint-TQC | Verint scorecards with IQA in form name |

**3.2.3.2.6 Program**

The Program (Medicare or Marketplace) shall be determined from the input feed by the following:

Yes = Marketplace

No = Medicare

**3.2.3.2.7 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.3.2.8 Date of Coaching**

The date of coaching or event will be the Call Date/Time from the input feed.

**3.2.3.2.9 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement shall be from the feed file as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Forms** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-Reason** |
| Non-ATA | Quality | Did not meet goal  Met goal | Other: Specify reason under coaching details. |
| ATA | ATA Alignment | Met goal | Other: Specify reason under coaching details. |

**3.2.3.2.10 Report Details**

The report details will be the summary of caller’s issues from the input feed.

**3.2.3.2.11 eCoaching Log Status**

The status of the eCoaching Log will be determined from the input feed as follows:

Pending Acknowledgement when coaching log is Met goal and active status is Active

Pending Supervisor Review when coaching log is Did not meet goal and not CSE and active status is Active

Pending Manager Review when coaching log is Did not meet goal and CSE and active status is Active

Inactive when coaching log active status is Inactive (note: only for existing coaching logs with matching evaluation id)

**3.2.3.2.12 Reviewer**

The current employee hierarchy will be used to determine the employee’s supervisor and manager.

#### **3.2.3.3 Electronic Timekeeping System**

Electronic Timekeeping System 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. Also, for Supervisors who committed a timekeeping infraction such as approving a time card of a direct report which contained a timekeeping infraction.

**3.2.3.3.1 ETS Reports**

The ETS eCoaching Logs will be initiated in either the CSR module or the Supervisor module.

**3.2.3.3.1.1 ETS Reports for CSRs**

The following reports will be generated by Time Card Administrators for CSRs in the CSR module:

|  |  |
| --- | --- |
| **ETS Report Code** | **Report** |
| HNC | High Number of Changes |
| ICC | Incorrect Change Categories |

**3.2.3.3.1.2 ETS Reports for CSRs and Supervisor**

The following reports will be generated by Time Card Administrators for CSRs in the CSR module and supervisors in the supervisor module:

|  |  |
| --- | --- |
| **ETS Report Code** | **Report** |
| EA | Excused Absence |
| HOL | Incorrect Holiday |
| ITD | Invalid Timecodes Direct |
| ITI | Invalid Timecodes Indirect |
| FHW | Future Hours Worked |
| OAE | Outstanding Action (Employee) |

**3.2.3.3.1.3 ETS Reports for Supervisors**

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

|  |  |
| --- | --- |
| **ETS Report Code** | **Report** |
| EOT | Exempt Over Time |
| HOLA | Incorrect Holiday (Approver) |
| ITDA | Invalid Timecodes Direct (Approver) |
| ITIA | Invalid Timecodes Indirect (Approver) |
| FWHA | Future Hours Worked (Approver) |
| OAS | Outstanding Acton (Supervisor) |

**3.2.3.3.2 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.

**3.2.3.3.3 Location**

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

\\F3420-ECLDBP01\data\Coaching\ETS\Encrypt\_In

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\ETS\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\ETS\Encrypt\_In

**3.2.3.3.4 Naming Convention**

The following naming convention will be used for reports EA, HOL, ITD, ITI, FWH, EOT, EA, HOLA, ITDA, ITIA, FWHA, HNC, ICC:

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

The following naming convention will be used for reports OAE (CSR module), OAE (Supervisor module), and:

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.

Note: the file will be encrypted and will have .zip.encrypt appended to the name

**3.2.3.3.5 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 and only CSR are expected to be in the HNC and ICC reports.

**3.2.3.3.5.1 Identify Source for eCoaching Log**

The source of the coaching log shall be ETS.

**3.2.3.3.5.2 Program**

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

**3.2.3.3.5.3 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.3.3.5.4 Date of Coaching**

The date of coaching or event will be the Friday End Date in the feed file except as noted below:

|  |  |
| --- | --- |
| **Report Code** | **Coaching/Event Date** |
| OAE, OAS | Time Period from feed file |
| HNC, ICC | WE Date from feed file |

**3.2.3.3.5.5 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement shall be as follows and determined by the ETS report code:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Module** | **Coaching Reason** | **Opportunity / Reinforcement** | **Report Code** | **Coaching Sub-Reason** |
| CSR | ETS | Opportunity | EA | Excused absence, paid leave |
| HOL | Holiday hours |
| ITD | Invalid time code – Direct |
| ITI | Invalid time code – Paid leave |
| FWH | Future hours |
| HNC | High Number of Changes |
| ICC | Incorrect Change Categories |
| CSR | ETS | Research Required | OAE | Outstanding Action (Employee) |
| Supervisor | ETS | Opportunity | EOT | Exempt OT hrs |
| EA | Excused absence, paid leave |
| HOLA | Holiday hours (Approver) |
| ITDA | Invalid time code – Direct (Approver) |
| ITIA | Invalid time code – Paid leave (Approver) |
| FWHA | Future hours (Approver) |
| Supervisor | ETS | Research Required | OAE | Outstanding Action (Employee) |
| OAS | Outstanding Action (Supervisor) |

**3.2.3.3.5.6 Report Details**

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

|  |  |  |
| --- | --- | --- |
| **Module** | **OMR Report Code** | **Fields from Feed File** |
| CSR | 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 |
| CSR | OAE | Time Period  Employee Name |
| CSR | HNC | WE Date  TC Change Count |
| CSR | ICC | WE Date  Incorrect Change Categories |
| Supervisor | 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 |
| Supervisor | OAE, OAS | Time Period  Employee Name  Associated Person (only for the OAS report) |

**3.2.3.3.5.6.1 Description Text**

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

**3.2.3.3.5.6.1.1 Excused absence, paid leave Description Text**

Include the following text in the description for Excused absence, paid leave (EA) 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>

**3.2.3.3.5.6.1.2 Holiday hours Description Text**

Include the following text in the description for Holiday hours (HOL) 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>

**3.2.3.3.5.6.1.3 Invalid time code – Direct Description Text**

Include the following text in the description for Invalid time code – Direct (ITD) 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>

**3.2.3.3.5.6.1.4 Invalid time code – Paid leave Description Text**

Include the following text in the description for Invalid time code – Paid leave (ITI) 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>

**3.2.3.3.5.6.1.5 Future hours Description Text**

Include the following text in the description for Future hours (FHW) 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>

**3.2.3.3.5.6.1.6 Outstanding Action (Employee) Description Text**

Include the following text in the description for Outstanding Action (Employee) (OAE) 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>

**3.2.3.3.5.6.2 Description Text**

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

**3.2.3.3.5.6.2.1 Exempt OT hrs Description Text**

Include the following text in the description for Exempt OT hrs (EOT) 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>

**3.2.3.3.5.6.2.2 Excused absence, paid leave Description Text**

Include the following text in the description for Excused absence, paid leave (EA) 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>

**3.2.3.3.5.6.2.3 Holiday hours (Approver) Description Text**

Include the following text in the description for Holiday hours Approver (HOLA) 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>

**3.2.3.3.5.6.2.4 Invalid time code – Direct (Approver) Description Text**

Include the following text in the description for Invalid time code – Direct Approver (ITDA) 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>

**3.2.3.3.5.6.2.5 Invalid time code – Paid leave (Approver) Description Text**

Include the following text in the description for Invalid time code – Paid leave Approver (ITIA) 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>

**3.2.3.3.5.6.2.6 Future hours (Approver) Description Text**

Include the following text in the description for Future hours Approver (FWHA) 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>

**3.2.3.3.5.6.2.7 Outstanding Action (Employee) Description Text**

Include the following text in the description for Outstanding Action (Employee) (OAE) 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>

**3.2.3.3.5.6.2.8 Outstanding Action (Supervisor) Description Text**

Include the following text in the description for Outstanding Action (Supervisor) (OAS) 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>

**3.2.3.3.5.6.2.9 High Number of Changes Description Text**

Include the following text in the description for High Number of Changes (HNC) eCoaching Log:

The employee made an unusually high number of changes on their timecard for last week. While not all timecard changes can be avoided, large numbers of timecard changes are often a sign that an employee may not understand the correct process for calculating and entering time in ETS.

Many of the employees who made high numbers of changes also failed to accurately explain why the changes were being made. Please refer to the communication linked on the report page that explains the required level of detail and contains examples of appropriate timecard change reasons.

If the changes were avoidable, please coach the employee on the correct way to calculate and enter time in ETS. If the employee failed to provide adequate change reasons, please coach the employee on the required level of detail for timecard change reasons. There is no need to make changes to the change category or reason for current or previous timecards.

The date and number of changes is shown below:

<Report Details – fields from report>

**3.2.3.3.5.6.2.10 Incorrect Change Category Description Text**

Include the following text in the description for Incorrect Change Category (ICC) eCoaching Log:

The employee selected incorrect Change Categories when changing previously entered hours in ETS last week. It is important that employees select the best available change category when changing previous ETS entries.

Many of the employees who selected incorrect change categories also failed to accurately explain why the changes were being made. Please refer to the communication linked on the report page that explains the required level of detail and contains examples of appropriate timecard change reasons.

Please coach the employee on selecting the correct change categories in ETS when adjustments are needed. If the employee failed to provide adequate change reasons, please also coach the employee on the required level of detail for timecard change reasons. There is no need to make changes to the change category or reason for current or previous timecards.

The timecard date and number of changes with incorrect change categories is shown below:

<Report Details – fields from report>

**3.2.3.3.5.7 Status of eCoaching Log**

The status of the coaching log shall be Pending Supervisor Review in the CSR module and Pending Manager Review in the Supervisor module.

**3.2.3.3.5.8 Email notification**

Email notifications will be sent to the appropriate reviewer in the employee’s hierarchy.

**3.2.3.3.5.9 Other information**

Other necessary information shall be determined as follows:

|  |  |  |
| --- | --- | --- |
| **Report Code** | **Field** | **Value** |
| HNC, ICC | Submitted Date | Date of processing/loading file |
| Submitter Name | TCA Team |
| Submitter Email | CCO\_Timecard\_help@gdit.com |
| Site/Location | From the employee table for employee in feed file |
| Program | From the employee table for employee in feed file |

**3.2.3.3.5.10 Invalid Records Not Processed**

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

#### **3.2.3.4 Training Reports**

The training reporting process facilitates 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.

The SDR feed contains records for TQC GDIT verified training when the prescribed length of training session is completed much sooner than expected. SDR feeds are generated by the Quality Team, which identifies thresholds and exceptions that require coaching or further research by Call Center Supervisors.

The ODT feed contains records for TQC GDIT verified training when the required training has not been completed by the scheduled due date. The report identifies thresholds and exceptions that require coaching or further research by Call Center Supervisors.

All items are entered into the eCL via a data feed. Utilizing the eCL workflow, items can be tracked from start to finish to verify if items have been addressed. eCL will also provide reporting on the number of SDRs entered into the system, the number coached, pending coaching, pending review or reasons why coaching was not required.

**3.2.3.4.1 Feed File Layout**

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

**3.2.3.4.2 Location**

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

\\F3420-ECLDBP01\data\Coaching\Training\Encrypt\_In

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\Training\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\Training\Encrypt\_In

**3.2.3.4.3 Naming Convention**

The file will have the following naming convention:

eCL\_Training\_Feed\_XXX<YYYYMMDD>.csv

<YYYYMMDD> represents the Year, Month and Day

where XXX is the 3 letter Report Code for the individual report and yyyymmdd is the date the file generated in year month day format.

|  |  |
| --- | --- |
| **Report Code** | **Report** |
| SDR | Short Duration Report |
| ODT | Overdue Training Report |

Note: the file will be encrypted and will have .zip.encrypt appended to the name

**3.2.3.4.4 Invalid Records Not Processed**

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

**3.2.3.4.5 Source**

The source of the coaching log shall be Training and Development.

**3.2.3.4.6 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.3.4.7 Date of Coaching**

The date of coaching or event will be the Event Date from the input feed.

**3.2.3.4.8 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement for the logs shall be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Report Code** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| SDR | Current Coaching Initiatives | Research Required | Short Duration Report |
| ODT | Current Coaching Initiatives | Research Required | Overdue Training Report |

**3.2.3.4.9 Report Details**

The details of the eCoaching Log will be determined by the input feed.

**3.2.3.4.10 Description Text**

Include the following text in the description for eCoaching Logs:

<Report Details –concatenation of text description fields from report>

Static Text:

**3.2.3.4.11 eCoaching Log Status**

The status of the eCoaching log will be Pending Supervisor Review.

#### **3.2.3.5 Generic Reports**

Other reports which are processed and generate the need for coaching, will be processed from a data feed to create coaching logs.

**3.2.3.5.1 Feed File Layout**

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

**3.2.3.5.2 Location**

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

\\F3420-ECLDBP01\data\Coaching\Generic\Encrypt\_In

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\Generic\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\Generic\Encrypt\_In

**3.2.3.5.3 Naming Convention**

The file will have the following naming convention:

eCL\_Generic\_Feed\_XXX<YYYYMMDD>.csv

or

eCL\_Generic\_Feed\_XXX\_ZZZ<YYYYMMDD>.csv

<YYYYMMDD> represents the Year, Month and Day

where XXX is the 3 letter OTH Report Code for the generic report and \_ZZZ represents a specific Report Code and yyyymmdd is the date the file generated in year month day format.

|  |  |
| --- | --- |
| **Report Code** | **Report** |
| OTH | Other Report |
| OTH\_SEA | Seasonal Employee Attendance |
| OTH\_DTT | Discrepancy Time Tracking |

Note: the file will be encrypted and will have .zip.encrypt appended to the name

**3.2.3.5.4 Invalid Records Not Processed**

Records from the feed file which cannot be processed will be identified. Invalid records will those which the log employee is not on file, not active, or has a job code not appropriate for log.

**3.2.3.5.5 Source**

The source of the coaching log shall be as follows

|  |  |
| --- | --- |
| **Report Code** | **Report** |
| OTH | Determined by the Source value in the feed file |
| SEA | Internal CCO Reporting |
| DTT | Empower |

**3.2.3.5.6 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.3.5.7 Date of Coaching**

The date of coaching or event will be the Event Date from the input feed.

**3.2.3.5.8 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement for the logs shall be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Report Code** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| OTH | Determined by the Coaching Reason value in the feed file | Determined by the Value value in the feed file | Determined by the Coaching sub-reason value in the feed file |
| SEA | Attendance | Opportunity | Other: Specify reason under coaching details. |
| DTT | Attendance | Opportunity | Discrepancy Tracking |

**3.2.3.5.9 Report Details**

The report details of the eCoaching Log will be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Report Details** |
| OTH | Determined by the Text Description value in the feed file |
| SEA | The text description field from the report input file |
| DTT | The text description field from the report input file |

**3.2.3.5.10 Description Text**

Include the following text in the description for eCoaching Logs:

|  |  |
| --- | --- |
| **Report Code** | **Text Description** |
| OTH | <Description text from the feed> |
| SEA | <Description text from the feed> |
| DTT | <Description text from the feed> |

**3.2.3.5.11 eCoaching Log Status**

The status of the eCoaching log will be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Status** |
| OTH | Determined by the Status value in the feed file |
| SEA | Pending Acknowledgement |
| DTT | Pending Employee Review |

**3.2.3.5.12 Email notification**

Email notifications will be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Email Notifications** |
| OTH | Determined by the value of the Source field in the feed file |
| SEA | Email notifications will be sent to the coaching log recipient and the recipient’s supervisor. |
| DTT | Email notifications will be sent to the coaching log recipient |

**3.2.3.5.13 Other information**

The following information shall be determined as follows:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Report Code** | **Module** | **Site** | **Program** | **CSE** | **Email** | **Submitter** |
| OTH | Determined by the Module value in the feed file | From employee record | From employee record | Determined by the CSE value in the feed file | Determined by the Email value in the feed file | Determined by the Submitter value in the feed file |
| SEA | Customer Service Representative | From employee record | From employee record | Not Applicable | Not Applicable | 999999 |
| DTT | Supervisor | From employee record | From employee record | Not Applicable | Not Applicable | 999999 |

#### **3.2.3.6 Quality Reports**

Quality reports which are processed and generate the need for coaching, will be processed from a data feed to create coaching logs.

**3.2.3.6.1 Feed File Layout**

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

**3.2.3.6.2 Location**

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

\\F3420-ECLDBP01\data\Coaching\Quality\Encrypt\_In

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\Quality\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\Quality\Encrypt\_In

**3.2.3.6.3 Naming Convention**

The file will have the following naming convention:

eCL\_Quality\_Feed\_XXX<YYYYMMDD>.csv

<YYYYMMDD> represents the Year, Month and Day

where XXX is the 3 letter Report Code for the individual report and yyyymmdd is the date the file generated in year month day format.

|  |  |
| --- | --- |
| **Report Code** | **Report** |
| CTC | Coach the Coach |
| KUD | Kudos |
| HFC | High Five CSAT |
| OTA | Overturned Appeals |

Note: the file will be encrypted and will have .zip.encrypt appended to the name

**3.2.3.6.4 Invalid Records Not Processed**

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

**3.2.3.6.5 Source**

The source of the coaching log shall be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Source** |
| CTC | Coach the coach |
| KUD | Internal CCO Reporting |
| HFC | Internal CCO Reporting |
| OTA | Quality Alignment |

**3.2.3.6.6 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.3.6.7 Date of Coaching**

The date of coaching or event will be the Event Date from the input feed.

**3.2.3.6.8 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement for the logs shall be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Report Code** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| CTC | Coaching | Reinforcement | Supervisor eCL Coaching |
| KUD | Recognition | Reinforcement | Other: Specify reason under coaching details. |
| HFC | Quality | Reinforcement | CSAT |
| OTA | Quality | Opportunity | Other: Specify reason under coaching details. |

**3.2.3.6.9 Report Details**

The report details of the eCoaching Log will be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Report Details** |
| CTC | A concatenation of text description fields from report i.e. Problem, Behavior, Result, Follow Up |
| KUD | The text description field from the report input file |
| HFC | The text description field from the report input file |
| OTA | The text description field from the report input file |

**3.2.3.6.10 Description Text**

Include the following text in the description for eCoaching Logs:

|  |  |  |
| --- | --- | --- |
| **Report Code** | **Feed Code** | **Text Description** |
| CTC | N/A | <Report Details as determined from the feed file> |
| KUD | N/A | <Report Details as determined from the feed file> |
| HFC | N/A | <Report Details as determined from the feed file> |
| OTA | N/A | <Report Details as determined from the feed file> |

**3.2.3.6.11 eCoaching Log Status**

The status of the eCoaching log will be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Status** |
| CTC | Pending Acknowledgement |
| KUD | Pending Acknowledgement |
| HFC | Pending Acknowledgement |
| OTA | Pending Quality Lead Review |

**3.2.3.6.12 Email notification**

Email notifications for Quality Report coaching logs will be sent as follows:

|  |  |
| --- | --- |
| **Report Code** | **Status** |
| CTC | Email notifications for CTC coaching logs will be sent to the coaching log recipient and the recipient’s supervisor. |
| KUD | Email notifications for KUD coaching logs will be sent to the coaching log recipient and the recipient’s supervisor. |
| HFC | Email notifications for HFC logs will be sent to the coaching log recipient and the recipient’s supervisor. |
| OTA | Email notifications for OTA logs will be sent to the coaching log recipient’s supervisor. |

**3.2.3.6.13 Other information**

Module, Site or location and Program shall be determined as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Report Code** | **Module** | **Site** | **Program** |
| CTC | Supervisor | From employee record | From employee record |
| KUD | Customer Service Representative | From input record | From input record |
| HFC | Customer Service Representative | From input record | From input record |
| OTA | Quality | From input record | From input record |

### 3.2.4 Dashboard Display

Dashboards display eCoaching Logs. Which dashboard, dashboard sections, and logs are displayed is dependent upon the employee’s job code and position in the employee hierarchy structure.

#### **3.2.4.1 Access to Dashboards**

Access to dashboard tabs will be dependent upon the employee or user’s job code.

**3.2.4.1.1 Main Dashboard (My Dashboard)**

The following shall have access to eCoaching Log My Dashboard:

|  |  |
| --- | --- |
| **Employee** | **Job code** |
| CSR level | WACS0\* |
| Supervisor level | \*40  WTTI\* |
| Manager level | \*50, \*60, \*70, \*80  WEEX\*  WISO\*  WISY\* WPPM\*  WPWL\*  WSTE\* |
| Support Staff level | Any which are not ‘Unknown’ or previously listed |

Note: Human Resources users – WH\* and included in HR Employee Information file will not have access

**3.2.4.1.2 Submitted Dashboard (My Submissions)**

The following shall have access to eCoaching Log My Submissions:

|  |  |
| --- | --- |
| **Employee** | **Job code** |
| Supervisor level | \*40  WTTI\* |
| Manager level | \*50, \*60, \*70, \*80  WEEX\*  WISO\*  WISY\*  WPPM\*  WPWL\*  WSTE\* |
| Support Staff level | Any which are not ‘Unknown’ or previously listed except those with CSR level job codes (WACS01, WACS02, WACS03), unless they are in the database table EC.Historical\_Dashboard\_ACL with a Role of ARC |

Note: Human Resources users – WH\* and included in HR Employee Information file will not have access

**3.2.4.1.3 Historical (Historical Dashboard)**

The following shall have access to eCoaching Log My Submissions:

|  |  |
| --- | --- |
| **Employee** | **Job code** |
| Supervisor level and above | \*40, \*50, \*60, \*70, \*80  WACQ\*  WEEX\*  WISO\*  WISY\*  WPPM\*  WPOP11  WPWL\*  WSQE\*  WSTE\* |
| Human Resources | WH\* and included in HR Employee Information file |

**3.2.4.1.4 Authorized Access**

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.

**3.2.4.1.5 Human Resources**

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.

**3.2.4.1.6 Senior Managers**

Senior managers will have access to eCoaching logs and Warning logs for employees within their hierarchy structure even if not direct reports. Senior managers are defined by those who have a job code of WACS60.

**3.2.4.1.7 Reactivated logs**

Reactivated eCoaching and Warning logs will be displayed in the appropriate normal dashboards based on the log’s status and the current hierarchy of the log recipient.

**3.2.4.1.8 Reassigned logs**

Reassigned eCoaching will be displayed in the appropriate normal dashboards based on the log’s status and the current hierarchy of who the logs is reassigned to. The log work flow after reassignment will use the recipient’s current hierarchy.

**3.2.4.1.9 Pending graph**

Logs for the employee in a pending status will be shown in a graph.

#### **3.2.4.2 Inactive logs**

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

#### **3.2.4.3 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 and may appear in a different order than listed.

The Dashboard filters will contain the following values:

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Values** |
| 1 | Location | All Sites  Bogalusa  Chester  Coralville  Corbin  Hattiesburg  Lawrence  London  Lynn Haven  Phoenix  Riverview  Sandy  Waco  Winchester  Note: All Sites may be selected |
| 2 | Employee | All Employees  Last name, First name, MI  Note: All Employees may be selected |
| 3 | Supervisor | All Supervisors  Last name, First name, MI  Note: All Supervisors may be selected |
| 4 | Manager | All Managers  Last name, First name, MI  Note: All Managers may be selected |
| 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  BCC Security and Privacy Incident Coaching  Classroom Observation  CMS Contractor (NGS, VCS) Reported Issue  CMS Reported Item  Coach the Coach  CSAT  CSET  CSR Reported Issue  DMEPOS Escalations  Empower  ETS  Floor Walking  Integrated Performance Center  Internal CCO Reporting  IQS  Leadership Listening  LimeSurvey  Manager Coaching  OMR  Other  Performance Scorecard  Quality Call Listening  Quality Specialist Coaching  Supervisor Coaching  Training and Development  Verint Quality Monitoring  Verint-GDIT  Verint-GDIT Supervisor  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 and available for Warnings only |

#### **3.2.4.4 Employee Dashboard**

This dashboard allows the Employee to view their pending and completed eCLs. The employee generally represents the level 1 recipient of the log regardless of job code or module.

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 = Employee  Status = Pending Employee Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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 = Employee  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

**3.2.4.4.1 Employee Dashboard Filters**

The Employee dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Pending eCoaching Logs** | |
| A | N/A | No additional filter |
| 2 | **My Completed eCoaching Logs** | |
| A | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |

#### **3.2.4.5 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. Supervisors will be able to view Warning eCoaching Logs for their direct reports. Any eCoaching logs which have been reassigned to a Supervisor, will also appear on their dashboard. The supervisor generally represents the level 2 reviewer of the log regardless of job code or module (immediate supervisor of the recipient).

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, Pending Quality Lead Review  or Status =Pending Acknowledgment  or Status =Pending Employee Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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, Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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  Submitted = Begin and End date range (defaults to last 30 days) | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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  Status = Completed  States = Active or Expired | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-Coaching Reason)  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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 = eCL Submitter | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

**3.2.4.5.1 Supervisor Dashboard Filters**

The Supervisor dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Pending eCoaching Logs** | |
| A | N/A | No additional filter |
| 2 | **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. |
| 3 | **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. |
| 4 | **My Completed eCoaching Logs** | |
| A | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 5 | **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. |
| 6 | **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 | 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 | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| E | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |

#### **3.2.4.6 Manager Dashboard**

This dashboard allows the Manager (or supervisor acting as manager) to view eCoaching and Warning logs in pending and completed status of their direct reports (i.e. level 2), logs for employees of their direct reports (i.e. level 1) as well as their own pending eCLs. Any eCoaching logs which have been reassigned to a Manager, will also appear on their dashboard. The manager generally represents the level 3 reviewer of the log regardless of job code or module (immediate supervisor of the recipient’s supervisor).

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 | 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  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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 Quality Lead Review, Pending Acknowledgment | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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 defaults to 25 logs with option for 10, 25, 50, 100  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  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 defaults to 25 logs with option for 10, 25, 50, 100  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 = eCL Submitter | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

**3.2.4.6.1 Manager Dashboard Filters**

The Manager dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **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 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. |
| B | Source | Includes a list of possible source values of coaching logs. |
| 3 | **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 Completed eCoaching Logs** | |
| A | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 5 | **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. |
| 6 | **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 | 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 | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| E | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |

#### **3.2.4.7 Quality/Training/Employee Dashboard**

The dashboard allows the Quality, Training, LSA employees who are not CSRs, to view their pending, completed, and submitted eCLs. These individuals generally represents the level 1 or recipient of the log regardless of job code or module.

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 = Employee (non-CSR)  Status = Pending Employee Review  or Status = Pending Acknowledgment | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  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 = Employee (non-CSR)  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination defaults to 25 logs with option for 10, 25, 50, 100  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 3 | My Submitted eCoaching Logs | Submitter Name = current user  Role = Employee (non-CSR) | 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. |

**3.2.4.7.1 Quality/Training/Employee Dashboard Filters**

The Quality\Training\Employee dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Pending eCoaching Logs** | |
| A | N/A | No additional filter |
| 2 | **My Completed eCoaching Logs** | |
| A | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 3 | **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 | 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 | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| E | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |

#### **3.2.4.8 Support Staff Dashboard**

The dashboard allows the support staff to view their submitted eCLs. These are generally individuals who may have access to eCoaching, but do not have role within the application.

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 Submitted eCoaching Logs | Support Staff 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 defaults to 25 logs with option for 10, 25, 50, 100  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

**3.2.4.8.1 Support Staff Dashboard Filters**

The Support Staff dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **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 | 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 | Status | Include the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| E | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |

#### **3.2.4.9 Historical Reporting Dashboard**

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. 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 Field Selections** | **Displayed Fields** | **Sort Options** |
| 1 | Historical Employee eCoaching Logs Dashboard | Submitted Date From  Submitted Date To  Active Employee, Inactive Employee, Both  Site Manager Name  Supervisor Name  Employee Name  Submitter  Status  Source  Values  Note: Only Human Resources users will have the option to filter by source of Warning. | Form Name (w/Link to form)  Employee name,  Supervisor name  Manager name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date (submission date) | Data grid should be empty until filter(s) have been selected  Pagination defaults to 25 records, but 10, 25, 50, 100 are selectable options  Show items in descending order from Created Date  Sorting can be done by selecting one of the following columns:  Form Name  Employee name  Supervisor name  Manager name  Status  Create Date |

**3.2.4.9.1 Historical Reporting Dashboard Filters**

This Historical dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| A | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| B | Active/Inactive/Both Employees | Active will report on active logs of active employees; Inactive will report on active logs of inactive employees; Both reports on active logs of active and inactive employees |
| C | Location | Includes a list of active locations or sites for contact center operations. |
| 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 | 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. |
| F | 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. |
| G | Submitter | Includes the name of the person who submitted the coaching log. |
| H | Status | Includes the possible status values for coaching logs. Logs in Inactive status cannot be filtered on. |
| I | Source | Includes a list of possible source values of coaching logs. |
| J | Value | Includes the possible values associated with coaching logs. |

**3.2.4.9.2 Extract data from Historical Dashboard**

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

**3.2.4.9.2.1 Extract Limit**

Limit the number of coaching logs to export to 20,000. If the user attempts to export more than the limit, do not export logs and display message to user to refine filters and try again.

#### **3.2.4.10 Senior Manager Dashboard**

This dashboard enables those designated as Senior Managers to view summary as well as detail information of eCoaching logs and Warning logs for those employees in their reporting structure, even if not direct reports. The date and time shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time).

**3.2.4.10.1 Filter Criteria**

The data to be displayed shall be determined by filter criteria.

**3.2.4.10.1.1 Time Frame**

The data to be displayed shall default to the current month. The previous 11 months may be selected and corresponding data displayed. Months in the future will not be available.

**3.2.4.10.1.1.1 Month**

The month time period shall be from the first day to the last day.

**3.2.4.10.1.1.2 Week**

A week shall be defined as starting on a Sunday or first day of a month and ending on the following Saturday or last day of the month.

**3.2.4.10.1.2 Log Date**

The date of the eCoaching log shall be determined by the log’s Submitted Date. The completed date of the eCoaching log shall be determined by the CSR Review Auto Date.

**3.2.4.10.1.3 Modules**

The data to be displayed shall be from the CSR and Supervisor modules.

**3.2.4.10.2 High-level Summary**

Present the Senior Manager with a high-level summary of the count of eCoaching logs and Warning logs. The data for the view shall default to the current month. Previous months shall be selected and corresponding data displayed.

**3.2.4.10.2.1 Pending eCoaching Logs**

Display a count of eCoaching logs in a Pending status in the CSR and Supervisor modules combined when the log’s submitted date is within the selected month.

**3.2.4.10.2.2 Completed eCoaching Logs**

Display a count of eCoaching logs in a Completed status in the CSR and Supervisor modules combined when the log’s submitted date is within the selected month.

**3.2.4.10.2.3 Active Warning Logs**

Display a count of Warning logs in an Active state in the CSR and Supervisor modules combined regardless of when submitted or the selected month.

**3.2.4.10.3 Intermediate-level Summary**

Present the Senior Manager with an intermediate-level summary of the count of eCoaching and Warning logs in the various statuses and types of warnings.

**3.2.4.10.3.1 eCoaching Log Pending Status**

Display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Status** | **Description** |
| 1 | **Pending eCoaching Logs** | |
| A | Pending Acknowledgement | Display a count of eCoaching logs in a Pending Acknowledgement status in the CSR and Supervisor modules by week for the selected month. |
| B | Pending Employee Review | Display a count of eCoaching logs in a Pending Employee Review status in the CSR and Supervisor modules by week for the selected month. |
| C | Pending Supervisor Review | Display a count of eCoaching logs in a Pending Supervisor Review status in the CSR module by week for the selected month. |
| D | Pending Manager Review | Display a count of eCoaching logs in a Pending Manager Review status in the Supervisor and CSR modules by week for the selected month. |
| E | Pending Senior Manager Review | Display a count of eCoaching logs in a Pending Senior Manager Review status in the Supervisor module by week for the selected month. |

**3.2.4.10.3.2 eCoaching Log Completed Status**

Display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Status** | **Description** |
| 1 | **Completed eCoaching Logs** | |
| A | Completed | Display a count of eCoaching logs in a Completed status in the CSR and Supervisor module with values of Opportunity or Did not meet goal by week for the selected month. |
| B | Completed | Display a count of eCoaching logs in a Completed status in the CSR and Supervisor module with values of Reinforcement or Met goal by week for the selected month. |

**3.2.4.10.3.3 Warning Log Active State**

Display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **State** | **Description** |
| 1 | **Completed Active Warning Logs** | |
| A | Active | Display a count of Verbal Warning logs in an Active state in the CSR and Supervisor modules by warning type. |
| B | Active | Display a count of Written Warning logs in an Active state in the CSR and Supervisor modules by warning type. |
| C | Active | Display a count of Final Written Warning logs in an Active state in the CSR and Supervisor modules by warning type. |

**3.2.4.10.4 Detail level**

Present the Senior Manager with a detail-level table view of the selected logs.

**3.2.4.10.4.1 eCoaching Logs**

Display the following information when detail for Pending Coaching logs or Completed Coaching logs is selected:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | eCoaching Logs | Status = Pending or Completed | Form Name  Employee Name  Supervisor Name  Manager Name  Submitter Name  Source  Status  Coaching Reason  Sub-coaching Reason  Value  Submitted Date | Default Pagination = 10 records, but may be changed by user  Show items in descending order from Submitted Date  Sorting can be done by selecting any column heading except coaching reason, sub-coaching reason and value |

**3.2.4.10.4.1.1 Pending Senior Manager Review**

Display those logs in Pending Senior Manager Review first in the list. These are logs pending action by the Senior Manager.

**3.2.4.10.4.2 Warning Logs**

Display the following information when detail for Active Warning logs is selected:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | Warning Logs | State = Active | Form Name  Employee Name  Supervisor Name  Manager Name  Submitter Name  Source  Status  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-coaching Reason)  Value  Submitted Date | Default Pagination = 10 records, but may be changed by user  Show items in descending order from Submitted Date  Sorting can be done by selecting any column heading except warning type, warning reason(s) and value |

**3.2.4.10.4.3 Detail Filter**

Allow searching and filtering of the detail logs by Employee, Supervisor or Manager name.

**3.2.4.10.5 Log Detail**

eCoaching and Warning logs can be selected from the Dashboard and its corresponding information displayed and reviewed.

**3.2.4.10.5.1 Log Detail**

The following information shall be displayed when reviewing coaching logs:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 |  | Display form name of the log |
| 2 | Status: | Display status of log |
| 3 | Date Submitted: | Display submitted date of the log based on Pacific Daylight Time |
| 4 | Type: | Display whether Direct or Indirect |
| 5 | 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 |
| 6 | Source: | Display the source of the log |
| 7 | Site: | Display the site or location of the log |
| 8 | If the coaching log is a Verint one then then display  Verint ID: | Display the Verint ID of the log  Do not display label or value if Warning log |
| If the coaching log is an Avoke one then display  Avoke ID: | Display the Avoke ID of the log  Do not display label or value if Warning log |
| If the coaching log is a NGD Activity then display  NGD Activity ID: | Display the NGD Activity ID of the log  Do not display label or value if Warning log |
| If the coaching log is a UCID one then display  Universal Call ID: | Display the Universal Call ID of the log  Do not display label or value if Warning log |
| 9 | If the coaching log is a Verint one then display  Scorecard Name: | Display the scorecard form name of the log  Do not display label or value if Warning log |
| 10 | If the coaching log is a Verint one then display  Coaching Monitor: | Display whether log is a coaching monitor or not |
| 11 | Employee: | Display the employee of the log |
| 12 | Supervisor: | Display the supervisor of the employee of the log |
| 13 | Reassigned Supervisor: | Display the supervisor the log has been reassigned to or NA |
| 14 | 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 |
| 15 | Reassigned Manager: | Display the manager the log has been reassigned to or NA |
| 16 | Submitter: | Display the submitter of the log |
| 17 | Coaching Reason(s) | Display text |
| 18 | If the log is a Coaching log then display column headings  Reasons, Sub-Reasons, Values | If the log is a Coaching log then display the related coaching reasons, coaching sub-reasons, and associated coaching value for the coaching log beneath the corresponding column heading text displayed |
| If the log is a Warning log then display column headings  Warning Type, Warning Reason(s), Value | If the log is a Warning log then display the related warning reasons, warning sub-reasons, and associated warning value for the warning log beneath the corresponding column heading text displayed |
| 19 |  | Display in coaching/warning reason order and where possible, combine sub-reasons or values such as they display once for multiple reasons. |
| 20 | Details of the behavior being coached: | Display description of the log |
| 21 | Manager Notes: | If manager notes of the log exist then display text and manager notes of the log |
| 22 | Coaching Notes: | Display the coaching notes of log |
| 23 | Manager Review Information: | If manager notes of the log exist then display text and manager reviewer of the log |
| 24 | Reviewed and acknowledged on: | If manager notes of the log exist then display text and manager review auto date |
| 25 | Supervisor Review Information: | Display text and the supervisor reviewer of the log |
| 26 | Reviewed and acknowledged on: | Display text and supervisor review auto date of log |
| 27 | Employee Review Information: | Display text and the employee of the log |
| 28 | Reviewed and acknowledged on: | Display text and supervisor review auto date of log |
| 29 | Employee Comments/Feedback Information: | Display text and the employee comments/feedback of log |

#### **3.2.4.11 Director Dashboard**

This dashboard enables those designated as Director level employees to view summary as well as detail information of eCoaching logs and Warning logs for those employees in their reporting structure, even if not direct reports. The date and time shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time).

**3.2.4.11.1 Filter Criteria**

The data to be displayed shall be determined by filter criteria.

**3.2.4.11.1.1 Time Frame**

The data to be displayed shall default to the current month. The previous 11 months may be selected and corresponding data displayed. Months in the future will not be available.

**3.2.4.11.1.1.1 Month**

The month time period shall be from the first day to the last day.

**3.2.4.11.1.2 Site**

The data to be displayed shall be for the site the Director is responsible for based on the employee’s in the director’s hierarchy.

**3.2.4.11.1.2.1 Count by Status**

A count of logs in Pending and Completed status and Warnings shall displayed for each site.

**3.2.4.11.2 Graph**

A graphs showing the logs in Pending status shall be displayed.

**3.2.4.11.3 Detail level**

Present the Director with a detail-level table view of the selected logs.

**3.2.4.11.3.1 eCoaching Logs**

Display the following information when detail for Pending Coaching logs or Completed Coaching logs is selected:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | eCoaching Logs | Status = Pending or Completed | Form Name  Employee Name  Supervisor Name  Manager Name  Submitter Name  Source  Status  Coaching Reason  Sub-coaching Reason  Value  Submitted Date | Default Pagination = 10 records, but may be changed by user  Show items in descending order from Submitted Date  Sorting can be done by selecting any column heading except coaching reason, sub-coaching reason and value |

**3.2.4.11.3.2 Warning Logs**

Display the following information when detail for Warning logs is selected:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | Warning Logs | State = Active | Form Name  Employee Name  Supervisor Name  Manager Name  Submitter Name  Source  Status  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-coaching Reason)  Value  Submitted Date | Default Pagination = 10 records, but may be changed by user  Show items in descending order from Submitted Date  Sorting can be done by selecting any column heading except warning type, warning reason(s) and value |

**3.2.4.11.3.3 Export to Excel**

Allow coaching logs to be exported to Excel, but not Warning logs.

**3.2.4.11.3.3.1 Export to Excel Limit**

Limit the number of coaching logs to export to 20,000. If the user attempts to export more than the limit, do not export logs and display message to user to refine filters and try again.

### 3.2.5 eCoaching Log Review

eCoaching and Warning logs can be selected from the Dashboard and its corresponding information displayed and reviewed. 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.

#### **3.2.5.1 All Reviewers**

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

**3.2.5.1.1 Informational Display**

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

**3.2.5.1.1.1 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 | If the log is a Verint one then display  Coaching Monitor: | Display whether log is a coaching monitor or not |
| 12 | Employee: | Display the employee of the log |
| 13 | Supervisor: | Display the supervisor of the employee of the log |
| 14 | Reassigned Supervisor: | Display the supervisor the log has been reassigned to or NA |
| 15 | 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 |
| 16 | Reassigned Manager: | Display the manager the log has been reassigned to or NA |
| 17 | Submitter: | Display the submitter of the log |

**3.2.5.1.1.2 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.

**3.2.5.1.1.3 Examples**

Removed as no longer required.

**3.2.5.1.2 Opening**

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

**3.2.5.1.3 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 |  | Display in coaching/warning reason order and where possible, combine sub-reasons or values such as they display once for multiple reasons. |

**3.2.5.1.3.1 Examples**

Removed as no longer required.

**3.2.5.1.4 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 |

#### **3.2.5.2 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 submitter is not the supervisor or manager of the log’s recipient and manager notes of the log exist then display text and manager notes of the log |
| 3 | Coaching Notes: | Display the coaching notes of log |

#### **3.2.5.3 Employee of Log**

The employee of log is the recipient of the log regardless of job code or module the log is submitted in.

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 |

**3.2.5.3.1 Acknowledgement**

No longer required as employee recipient of log may enter feedback.

**3.2.5.3.2 Acknowledgement and feedback**

When employee recipient reviews log then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Customer satisfaction is critical to our success; therefore, to help gauge our performance, every caller is offered the option to complete a Customer Satisfaction (CSAT) survey. Using a scale from one to five, callers are able to rate their overall satisfaction. Top box, or a rating of “5,” indicates the caller was extremely satisfied! Thank you for taking good care of your callers; you make a difference for each caller AND for the CCO! | Display text when log source is Internal CCO Reporting and report code is HFC |
| Congratulations - you received a Kudos! Click here to take a listen to what a recent caller had to say about your customer service. | Display text when log source is Internal CCO Reporting and report code is KUD |
| To review your full details, please visit the CCO Performance Scorecard. If you have any questions, please see your supervisor. | Display text when the log source is Performance Scorecard and report code is MSR |
| To review your full details, please visit the CCO Performance Scorecard. If you have any questions, please submit an escalation via the CCO Performance Scorecard Information Station SharePoint site. | Display text when the log source is Performance Scorecard and report code is MSRS |
| Be sure to check the Beneficiary Indicators applet on every call. If a message is on file, the CSR must follow protocol and review it to determine whether the information is applicable to the beneficiary’s reason for calling. However, the CSR must read and follow any messages related to the new Medicare card, regardless of the reason for the call. In addition to reading such messages, the CSR must be sure to log them as “read” to document that the information has been relayed to the caller.  Remember, it is critical that we follow through with the appropriate action(s) outlined in the CSR Notes portion of the Message Details applet. This includes checking and confirming whether the beneficiary’s correct mailing address is on file. Depending on whether the address is correct, the CSR will take one of the two following actions:  -If the address is correct, you must order a replacement card for the beneficiary using the “Medicare Card” button (even if they don’t think they need one).  -If the address is incorrect, you must refer the beneficiary to the Social Security Administration (SSA) using information in Agent Partner Search.  When reviewing this type of message, always take the appropriate steps as directed, regardless of the reason for the call. Failing to do so in these cases will result in the beneficiary not receiving his/her new Medicare card. | Display text when log source is OMR and report code is PBH |
| 2 | 1. Check the box below to acknowledge the coaching opportunity: | Display text |
| 3 |  | Check box data entry |
| 4 | I have read and understand all the information provided on this eCoaching Log. | Display text |
| 5 | 2. Provide any comments or feedback below: | When the log source is not Empower, display text |
| 2. Please select one of the comments below for the log: | When the log source is Empower, display text |
| 6 |  | When the log source is not Empower, text data entry |
|  | When the log source is Empower then display drop down list with  ‘ATT Updated - with Approved Absence’  ‘ATT Updated - with Unapproved Absence’  ‘ATT Not Updated - SWP notified that Empower is inaccurate’  ‘ATT Not Updated and Empower will not be updated’  ‘ATT Not Updated - CSR Termed’  ‘CSR on a Leave of Absence’  ‘Absence is pending HR approval (LOA or WPA)’ |
| 7 | (max length 3,000 chars)  Provide as much detail as possible | When log source is not Empower, display text |
| 8 | Submit | Button to save information |
| 9 |  | When log source is IQS, LimeSurvey, Verint-GDIT, Verint-GDIT Supervisor, Verint-TQC, or  When log source is Internal CCO Reporting and report code is HFC, KUD, or SEA or  When log source is Performance Scorecard and report code is MSR  then  Status becomes Completed when Supervisor has acknowledged  Status becomes Pending Supervisor Review when Supervisor has not acknowledged |
|  | When log source is Coach the coach and report code is CTC  When the log source is Performance Scorecard and report code is MSRS  then  Status becomes Completed when Manager as acknowledged  Status becomes Pending Manager Review when Manager has not acknowledged |
|  | All other situations, Status becomes Completed |

**3.2.5.3.2.1 Link for KUD**

here is a hyper link to <https://cco.gdit.com/Connection/Pages/KudosCentral.aspx>.

**3.2.5.3.2.2 Link for MSR**

CCO Performance Scorecard is a hyper link to <https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx>.

**3.2.5.3.2.3 Links for MSRS**

CCO Performance Scorecard is a hyper link to <https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx>.

submit an escalation is a hyper link to <https://cco.gdit.com/Reports/Performance_Scorecard/Lists/Scorecard_Escalated_Issues_Log/NewIssue.aspx>

CCO Performance Scorecard Information Station is a hyper link to <https://cco.gdit.com/Reports/Performance_Scorecard/default.aspx>

#### **3.2.5.4 Supervisor of Record**

The supervisor of record is the immediate supervisor of the employee recipient of the log regardless of job code or module the log is submitted in.

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

**3.2.5.4.1 Acknowledgement**

For supervisors and the log source is IQS, LimeSurvey, Verint-GDIT, Verint-GDIT Supervisor, or Verint-TQC

For supervisors and the log source is Internal CCO Reporting and report code is HFC, KUD, or SEA

For supervisors and the log source is Performance Scorecard and report code is MSR

For managers when the log source is Coach the coach and report code is CTC

For managers when the log source is Performance Scorecard and report code is MSRS

then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Customer satisfaction is critical to our success; therefore, to help gauge our performance, every caller is offered the option to complete a Customer Satisfaction (CSAT) survey. Using a scale from one to five, callers are able to rate their overall satisfaction. Top box, or a rating of “5,” indicates the caller was extremely satisfied! Thank you for taking good care of your callers; you make a difference for each caller AND for the CCO! | Display text when log source is Internal CCO Reporting and report code is HFC |
| Click here to listen to CSR kudos! | Display text when log source is Internal CCO Reporting and report code is KUD |
| To review your full details, please visit the CCO Performance Scorecard. If you have any questions, please see your supervisor. | Display text when the log source is Performance Scorecard and report code is MSR |
| To review your full details, please visit the CCO Performance Scorecard. If you have any questions, please submit an escalation via the CCO Performance Scorecard Information Station SharePoint site. | Display text when the log source is Performance Scorecard and report code is MSRS |
| 2 | 1. Check the box below to acknowledge the monitor: | Display text |
| 3 |  | Check box data entry |
| 4 | I have read and understand all the information provided on this eCoaching Log. | Display text |
| 5 | Submit | Button to save information |
| 6 |  | When log source is IQS, LimeSurvey, Verint-GDIT, Verint-GDIT Supervisor, Verint-TQC, or  When log source is Internal CCO Reporting and report code is HFC, KUD, or SEA or  When log source is Performance Scorecard and report code is MSR  then  Status becomes Completed if Employee has acknowledged  Status becomes Pending Employee Review if Employee has not acknowledged |
|  | When log source is Coach the coach and report code is CTC  When log source is Performance Scorecard and report code is MSRS  then  Status becomes Completed if Supervisor has acknowledged  Status becomes Pending Employee Review if Supervisor has not acknowledged |

**3.2.5.4.1.1 Link for KUD**

here is a hyper link to <https://cco.gdit.com/Connection/Pages/KudosCentral.aspx>.

**3.2.5.4.1.2 Link for MSR**

CCO Performance Scorecard is a hyper link to <https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx>.

**3.2.5.4.1.3 Links for MSRS**

CCO Performance Scorecard is a hyper link to <https://f3420-mwbp11.vangent.local/scorecard/csrscorecard.aspx>.

submit an escalation is a hyper link to <https://cco.gdit.com/Reports/Performance_Scorecard/Lists/Scorecard_Escalated_Issues_Log/NewIssue.aspx>

CCO Performance Scorecard Information Station is a hyper link to <https://cco.gdit.com/Reports/Performance_Scorecard/default.aspx>

**3.2.5.4.2 Research Required**

When the log value is Research Required and

source is ETS and coaching reason is Outstanding Action – Employee (OAE), or

source is OMR and coaching reason is Inappropriate ARC Escalation or Inappropriate ARC Transfer, or Exceed Number of Breaks or Exceed Break Length or

source is Training and Development and coaching reason is Current Coaching Initiative and sub-reason is Short Duration Reporting (SDR) or Overdue Training Report then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | 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. | Display text for ETS OAE |
| 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. | Display text for OMR IAE, IAEF, IAT |
| CSRs are scheduled for specific times in Empower to ensure understanding of training materials presented. It is important to utilize the timeframe allotted to successfully understand the training content. Please be aware that the scheduled timeframe is a metric which has been agreed upon by CCO and CMS. You should use all or the majority of the scheduled time to review each eLearning module assigned. | Display text for SDR |
| The above training is now overdue. Please have the training completed and provide coaching on the specific reasons it was overdue. | Display text for ODT |
| You are receiving this eCL record because an employee on your team was identified in a Break Outlier Report. Please review the **ETS Breaks Outlier Report, the ETS entries**, and refer to HCSD-POL-HR-MISC-08 Break Time Policy and Break Policy Reference guide for additional information and provide the details in the record below. | Display text for BRL and BRN |
| 3 | 1. Date: | Display text |
| 4 |  | Date data entry |
| 5 | 2. Based off of your research does this record require coaching? | Display text |
| 6 | Yes  No | Radio button data entry  Radio button data entry |
| 7 | 3. Please provide reason / explanation / justification as to why the item is coachable for the Supervisor: | If radio button Yes selected, then display text |
| 8 | 3. What was the main reason this item was not coachable? | If radio button No selected, then display text |
| 9 |  | If report code is BRL or BRN and radio button No selected, then display drop down list with  ‘Approved accommodation on file’  ‘Other’ |
| If report code is IAE or IAEF and radio button No selected, then display drop down list with  ‘Agent no longer employed or on LOA’  ‘Escalation was appropriate’  ‘ISG or Supervisor told agent to escalate’  ‘Not enough information to coach’  ‘Other’ |
| If report code is not BRL, BRN, IAE, or IAEF and radio button No selected, then display drop down list with  ‘Other’ |
| 10 | 4. Please provide reason / explanation / justification as to why the item was not coach: | If radio button No selected, then display text |
| 11 |  | Text data entry |
| 12 | (max length 3,000 chars)  These notes will only be viewed by Supervisors |  |
| 13 | Submit | Button to save information |
| 14 |  | Status becomes Inactive if No selected for coaching required  Status becomes Pending Employee Review if Yes selected for coaching required |

**3.2.5.4.2.1 SOP Link for ETS OAE**

Contact Center Operations 3.06 Timecard Audit SOP is a hyper link 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).

**3.2.5.4.2.2 SOP Link for OMR IAE, IAEF, or IAT**

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

**3.2.5.4.2.3 Link for OMR BRL, BRN**

ETS Breaks Outlier Report is a hyper link to

<https://cco.gdit.com/bi/ReportsCatalog/AvayaBreakPolicyReporting/Forms/AllItems.aspx>.

**3.2.5.4.3 Supervisor Review**

For supervisors and the log source is not IQS, LimeSurvey, Verint-GDIT, Verint-GDIT Supervisor, or Verint-TQC or

For supervisors and the log source is ETS with reason Outstanding Action – Employee or

For supervisors and the log source is not Internal CCO Reporting and report code is HFC, KUD, or SEA or

For supervisors and the log source is OMR and report code is PBH

For supervisors and the log source is Quality Alignment and report code is OTA

For supervisor and log source is not Performance Scorecard and report code is MSR

and status is Pending Supervisor review or

For managers when the log source is not Coach the coach and report code is CTC or

For managers when the log source is not Performance Scorecard and report code is MSRS

and status is 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 | Click here to view the report containing the details of these changes. | Display text when log source is ETS and report code is HNC or ICC |
| Be sure to check the Beneficiary Indicators applet on every call. If a message is on file, the CSR must follow protocol and review it to determine whether the information is applicable to the beneficiary’s reason for calling. However, the CSR must read and follow any messages related to the new Medicare card, regardless of the reason for the call. In addition to reading such messages, the CSR must be sure to log them as “read” to document that the information has been relayed to the caller.  Remember, it is critical that we follow through with the appropriate action(s) outlined in the CSR Notes portion of the Message Details applet. This includes checking and confirming whether the beneficiary’s correct mailing address is on file. Depending on whether the address is correct, the CSR will take one of the two following actions:  -If the address is correct, you must order a replacement card for the beneficiary using the “Medicare Card” button (even if they don’t think they need one).  -If the address is incorrect, you must refer the beneficiary to the Social Security Administration (SSA) using information in Agent Partner Search.  When reviewing this type of message, always take the appropriate steps as directed, regardless of the reason for the call. Failing to do so in these cases will result in the beneficiary not receiving his/her new Medicare card. | Display text when log source is OMR and report code is PBH |
| 3 | Notes from Manager: | If coaching is required or manager notes of the log exist then display text and manager notes of the log |
| 4 | Enter the date of coaching: | Display text |
| 5 |  | Date data entry |
| 6 | 2. Provide the details from the coaching session including action plans developed: | Display Text |
| 7 |  | Text data entry |
| 8 | (max length 3,000 chars)  Provide as much detail as possible | Display text |
| 9 | Submit | Button to save information |
| 10 |  | Status becomes Completed if Source is Quality Alignment and report code is OTA  All others cases, status becomes Pending Employee Review |

**3.2.5.4.3.1 Link for ETS HNC, ICC**

here is a hyper link to <https://cco.gdit.com/Initiatives/floorcheck/Timecard_Compliance_Reporting/Timcard%20Changes%20Reports/Forms/AllItems.aspx>

**3.2.5.4.4 Not 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 |

#### **3.2.5.5 Manager of Record**

The manager of record is the manager (supervisor of supervisor) of the employee recipient of the log regardless of job code or module the log is submitted in.

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

**3.2.5.5.1 Research Required**

When the log value is Research required and source is OMR or the coaching reason is Current Coaching Initiative or source is ETS and coaching log is for Outstanding Action (Employee) or Outstanding Action (Supervisor), then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | 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 for OMR (except Low CSAT, ISQ) |
| 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. | Display text for OMR Low CSAT |
| You are receiving this eCL because you have been assigned to listen to and provide feedback on calls that have been identified as having a short duration. Details of each call can be found within the Performance Report Catalog by clicking here. Please review the calls and provide specific details on opportunities that requiring coaching. | Display text for OMR ISQ |
| 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. | Display text for ETS OAE |
| 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. | Display text for ETS OAS |
| 3 | 1. Date | Display text |
| 4 |  | Date data entry |
| 5 | 2. Based off of your research does this record require coaching? | Display text |
| 6 | Yes  No | Radio button data entry  Radio button data entry |
| 7 | 3. Please provide reason / explanation / justification as to why the item is coachable for the Supervisor: | If radio button Yes selected, then display text |
| 8 | 3. What was the main reason this item was not coachable? | If radio button No selected, then display text |
| 9 |  | If radio button No selected, then display drop down list with ‘Other’ |
| 10 | 4. Please provide reason / explanation / justification as to why the item was not coach: | If radio button No selected, then display text |
| 11 |  | Text data entry |
| 12 | (max length 3,000 chars)  These notes will only be viewed by Supervisors |  |
| 13 | Submit | Button to save information |
| 14 |  | Status becomes Inactive if No selected for coaching required  Status becomes Pending Supervisor Review if Yes selected for coaching required |

**3.2.5.5.1.1 SOP Link for OMR (except Low CSAT)**

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

**3.2.5.5.1.2 SOP Link for ETS OAE, OAS**

Contact Center Operations 3.06 Timecard Audit SOP is a hyper link 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)

**3.2.5.5.1.3 Performance Report Catalog Link for ISQ**

here is a hyper link to <https://cco.gdit.com/bi/ReportsCatalog/TQC_ShortCall/Forms/AllItems.aspx>

**3.2.5.5.2 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 |
| 14 |  | Status becomes Pending Supervisor Review if No selected for CSE  Status becomes Pending Supervisor Review if Yes selected for CSE |

**3.2.5.5.3 Not Manger 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 |

**3.2.5.5.4 Hierarchy Manager**

The manager in the hierarchy for OMR Low CSAT coaching logs shall be able to view the log, but not be able to offer input or notes unless the hierarchy manager is also the designated reviewing manger or has had the log reassigned to them from another manger.

#### **3.2.5.6 Other Reviewers**

When someone other than Employee, Supervisor, Manager or Submitter of record or an Employee, Supervisor, Manager or Submitter of the record or 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 coaching on | Display text and CSR review auto date of log |
| 8 | Supervisor Review Information: | Display text and the supervisor of the log |
| 9 | Reviewed and acknowledged coaching on | Display text and supervisor review auto date of log |
| 10 | Employee Comments/Feedback: | Display text and the employee comments/feedback of log |

#### **3.2.5.7 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.

### 3.2.6 Employee Information

Information for employees will be imported into the eCoaching Log system.

#### **3.2.6.1 Employee Information**

A record will be kept for each employee. eCoaching employees shall be those in the following departments:

W282304 – HCS\_HS\_CO\_FHA-CDC

W282318 – HCS\_HS\_CL\_CCO Ops-Call-Ctr

**3.2.6.1.1 Employee Hierarchy**

Employee hierarchy will be maintained such that each employee is associated with their immediate supervisor. For CSRs this is identified in Aspect eWFM. For the employee’s manager and all other employee hierarchy values, it is obtained from PeopleSoft.

#### **3.2.6.2 Employee Data Feed**

Employee information will populated from data feeds. A separate file will be obtained for Human Resource employees.

**3.2.6.2.1 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.

**3.2.6.2.1.1 File Location and Name**

The location of the employee and HR files will be: \\F3420-ECLDBP01\Data\Coaching\HRInfo\Encrypt\_In

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

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

The name of the HR employee file will be HR\_Employee\_Information.csv

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The files will be encrypted and will have .zip.encrypt appended to the name

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\HRInfo\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\HRInfo\Encrypt\_In

**3.2.6.2.1.2 File Format and Layout**

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

**3.2.6.2.1.3 Load Schedule**

The data load is scheduled to run daily at 7:00 PM EST.

**3.2.6.2.2 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.

**3.2.6.2.2.1 File Location and Name**

The location of the file will be: \\F3420-ECLDBP01\Data\Coaching\HRInfo\Encrypt\_In

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

Note:

The file will be encrypted and placed in Encrypt\_Out folder and decrypted for processing

The file will be encrypted and will have .zip.encrypt appended to the name

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\HRInfo\Encrypt\_In

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\HRInfo\Encrypt\_In

**3.2.6.2.2.2 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.

**3.2.6.2.2.3 Load Schedule**

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

**3.2.6.2.3 Special Handling**

Values contained in the data files require special handling.

**3.2.6.2.3.1 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.

**3.2.6.2.3.2 Reused Employee Information**

Employee information may be reused, duplicated, or re-issued to rehired or new employees. eCoaching Logs of previous unrelated employees should not be combined or displayed with new employees. This information includes but is not limited to first and last names, middle initial, employee ids, and LAN IDs.

**3.2.6.2.3.3 Employee IDs with spaces**

Leading and trailing spaces will be removed from employee id fields before storing.

**3.2.6.2.3.4 No Employee Data**

Stop processing if any of the files do not contain data.

**3.2.6.2.3.5 Preferred Name**

The employee name used in eCoaching shall be the preferred name from HR (rather than the legal name), if such name exists.

**3.2.6.2.3.6 Case Insensitivity**

The Employee ID shall be process in such a way that alpha characters are case insensitive – i.e. upper and lower case versions of a letter is considered the same or equal.

#### **3.2.6.3 Log Inactivation**

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

**3.2.6.3.1 Inactivate Coaching Logs**

**3.2.6.3.1.1 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. Uncompleted Surveys will also be inactivated.

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.

Note: Actual employee status is determined from PeopleSoft.

**3.2.6.3.1.1.1 Logging Information**

The following information will be saved each time an eCoaching Log is inactivated.

999998 will be the Employee ID of the person inactivating the log

The date and time the log is inactivated

Status of the log at the time it is inactivated

Information indicating the log is being inactivated because Employee Inactive, Employee on EA, or Employee not in feed from Employee Hierarchy Load

**3.2.6.3.1.2 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. Employee status is set to ‘T’.

**3.2.6.3.2 Inactivate Warning Logs**

**3.2.6.3.2.1 Employee Status**

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

**3.2.6.3.2.1.1 Logging Information**

The following information will be saved each time a Warning Log is inactivated.

999998 will be the Employee ID of the person inactivating the log

The date and time the log is inactivated

Status of the log at the time it is inactivated

Information indicating the log is being inactivated because Employee Inactive, or Employee not in feed from Employee Hierarchy Load

**3.2.6.3.2.2 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.

### 3.2.7 Administration Functions

Provide for administrative functions.

#### **3.2.7.1 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.

**3.2.7.1.1 Add Users**

Allow for adding users to the access control list (ACL).

**3.2.7.1.1.1 Role**

Designate the role of the user being added as one of the following:

Historical Dashboard Exception (ECL)

Advanced Resolution Center (ARC)

Director level employees (DIR)

**3.2.7.1.1.1.1 Historical Dashboard Exception**

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.

**3.2.7.1.1.1.2 Advanced Resolution Center**

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 will not have access to the “Review” page from the My Submitted Dashboard even if the user is the submitter.

**3.2.7.1.1.1.3 Director level employees**

Administrators can also designate specific users as DIR users which allow them to access eCL My Dashboard and review all logs within their hierarchy.

**3.2.7.1.1.2 User Site**

Allow for selecting the user’s site or location.

**3.2.7.1.1.3 User Name**

Allow for selecting the user’s name.

**3.2.7.1.2 Remove Users**

Allow for removing users from the access control list (ACL).

**3.2.7.1.3 Permissions for User Access Control List**

Permissions for the User Access Control List shall be those designated by the program manager.

#### **3.2.7.2 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.

**3.2.7.2.1 Application**

The process to delete coaching or warning logs shall be included within the administration tool.

**3.2.7.2.1.1 Permissions to Delete**

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

**3.2.7.2.1.2 Search for Log**

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

**3.2.7.2.1.3 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.

**3.2.7.2.1.4 Review Log**

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

**3.2.7.2.1.5 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.

**3.2.7.1.2.1.6 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.

**3.2.7.2.1.7 Backup**

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

#### **3.2.7.3 Inactivate Records**

Provide a means of inactivating eCoaching Logs or Warning Logs.

**3.2.7.3.1 Manual Process**

One or more active eCoaching Logs or Warning logs may be inactivated by users with the appropriate permissions.

**3.2.7.3.1.1 Logging Information**

The following information will be saved each time an eCoaching Log or Warning Log is inactivated.

Employee ID of the person inactivating the log

The date and time the log is inactivated

Status of the log at the time it is inactivated

Information indicating why the log is being inactivated

**3.2.7.3.1.1.1 List of Reasons for eCoaching Logs**

The following is a list of reasons which can be selected to indicate why an eCoaching log is being inactivated:

Error in submission

Extended Absence

Termed

Other

**3.2.7.3.1.1.2 List of Reasons for Warning Logs**

The following is a list of reasons which can be selected to indicate why a Warning log is being inactivated:

Error in submission

HR request

Other

**3.2.7.3.1.1.3 Other Reasons**

If Other is selected from the list of reasons, provide for an entry of text for describing the reason the log is being inactivated.

**3.2.7.3.1.2 Permissions**

**3.2.7.3.1.2.1 Permissions for eCoaching Logs**

Those identified as managers within the hierarchy for the module will have permission to inactivate eCoaching Logs. The managers will only be able to inactivate logs for employees at their site. Managers will be identified as those with job codes of WACS50, WACS60, WPPM13, WIHD50, WTTR50, WPPM50. Note: WACS50 and WACS60 will be granted the same permissions. Those designated as eCoaching Administrators for inactivations will have permissions to inactivate logs at any site.

**3.2.7.3.1.2.2 Permissions for Warning Logs**

Only those designated as eCoaching Administrators for inactivations will have permissions to inactivate Warning logs.

**3.2.7.3.1.2.3 Own Logs**

Users shall not be allowed to inactivate their own coaching or warning logs.

**3.2.7.3.1.3 Status**

**3.2.7.3.1.3.1 Status of eCoaching Logs**

Active eCoaching logs in any status except Completed will be available for inactivation by eCoaching Users. eCoaching Administrators may inactivate logs in any status including Completed ones. However, completed logs must be within the last three months.

**3.2.7.3.1.3.2 Status of Warning Logs**

Warning logs in a Completed status will be available for inactivation. eCoaching Administrators may inactivate logs both Completed and Expired logs.

**3.2.7.3.1.3.3 Status of Employees**

Display eCoaching and Warning logs for employees with active status of A (active), P (paid leave), or L (leave).

**3.2.7.3.1.4 Email notification**

No email notifications will be generated when eCoaching Logs are inactivated.

#### **3.2.7.4 Re-activate Records**

One or more eCoaching Logs or Warning Logs which have been inactivated may be re-activated.

**3.2.7.4.1 Logging Information**

The following information will be saved each time an eCoaching Log or Warning Log is re-activated.

Employee ID of the person reactivating the log

The date and time the log is reactivated

Status of the log at the time it is reactivated

Information indicating why the log is being reactivated

**3.2.7.4.1.1 List of Reasons for eCoachging Logs**

The following is a list of reasons which can be selected to indicate why an eCoaching log is being reactivated:

Error in inactivation

Return to work

Other

**3.2.7.4.1.2 List of Reasons for Warning Logs**

The following is a list of reasons which can be selected to indicate why a Warning log is being reactivated:

Error in inactivation

Return to work

Other

**3.2.7.4.1.3 Other Reasons**

If Other is selected from the list of reasons, provide for an entry of text for describing the reason the log is being reactivated.

**3.2.7.4.2 Permissions**

**3.2.7.4.2.1 Permissions for eCoaching and Warning Logs**

Only designated eCoaching Administrators for reactivations will have permissions to re-activate an inactivated eCoaching Log or Warning Log and may do so for any site.

**3.2.7.4.2.1.1 Own Logs**

Users shall not be allowed to reactivate their own coaching or warning logs.

**3.2.7.4.3 Status of Log**

Upon re-activation of an eCoaching Log or Warning log, the status shall be set to the value saved when it was inactivated. Only those logs which have a previous status saved will be allowed to be reactivated.

**3.2.7.4.4 Email notification**

System will generate emails when eCoaching Logs are reactivated.

**3.2.7.4.5 Status of Employees**

Only logs for employees with active status of A (active) shall be reactivated.

#### **3.2.7.5 Reassign eCoaching Logs**

Provide a means of reassigning eCoaching Logs.

**3.2.7.5.1 Logging Information**

The following information will be saved each time an eCoaching Logs is reassigned.

Employee ID of the person reassigning the log

Employee ID of the person the log is being assigned to

The date and time the log is reassigned

Status of the log at the time it is reassigned

Information indicating why the log is being reassigned

**3.2.7.5.1.1 List of Reasons for eCoaching Logs**

The following is a list of reasons which can be selected to indicate why an eCoaching log is being reassigned:

Supervisor / manager unavailable

Team change

Other

**3.2.7.5.1.2 Other Reasons**

If Other is selected from the list of reasons, provide for an entry of text for describing the reason the log is being reassigned.

**3.2.7.5.2 Permissions**

**3.2.7.5.2.1 Permissions for eCoaching**

Those identified as managers within the hierarchy for the module will have permission to reassign eCoaching Logs. The managers will only be able to reassign logs for employees at their site and reassign to those also at their site. Managers will be identified as those with job codes of WACS50, WACS60, WPPM13, WIHD50, WTTR50, WPPM50. Note: WACS50 and WACS60 will be granted the same permissions. Those designated as eCoaching Administrators for reassignments will have permissions to reassign logs at any site.

**3.2.7.5.3 Status of eCoaching Log**

Active eCoaching logs in any status other than one indicating it is competed, or being reviewed or acknowledged by the employee will be available for reassignment.

**3.2.7.5.4 Reassigned to**

An eCoaching Logs can be reassigned only to another employee at the same level as the person it is currently assigned to. Logs can be reassigned only within the same site.

**3.2.7.5.4.1 Across modules**

An eCoaching Log may be assigned to someone in a different module than the person making the reassignment.

**3.2.7.5.4.2 Reassign Own Logs**

The person reassigning logs may not reassign their own logs to another.

**3.2.7.5.5 Maximum reassignments**

An eCoaching Log may be reassigned a maximum of twice at each level.

**3.2.7.5.6 Email notification**

System will generate emails when eCoaching Logs are reassigned.

**3.2.7.5.7 Warning Logs**

Warning logs may not be reassigned.

**3.2.7.5.8 Status of Employees**

Display eCoaching logs for employees with active status of A (active), P (paid leave), or L (leave).

**3.2.7.5.9 Status of Supervisor/Manager**

Supervisors or managers with an active status of status of A (active), T (termed), D (deceased), P (paid leave), or L (leave) may have their employee’s logs reassigned to another supervisor/manager with an active status of A (active).

#### **3.2.7.6 Archive eCoaching Logs**

Provide a means of archiving eCoaching Logs.

**3.2.7.6.1 Coaching Logs**

Archive coaching logs which have a status of inactive and are one year or more old based on the log’s submitted date.

**3.2.7.6.1.1 Reason, Sub-reason, value**

The coaching log’s corresponding coaching reasons, sub-reasons, and values shall be archived as well.

**3.2.7.6.1.2 Audit Information**

When a log is archived, save the following additional information:

Date and time log was archived

**3.2.7.6.1.3 Reactivation**

Archived coaching logs cannot be reactivated.

**3.2.7.6.1.4 Unarchived**

Archived coaching logs cannot be unarchived.

**3.2.7.6.1.5 Reporting**

Archived coaching logs will only be reported on an ad hoc basis upon request.

**3.2.7.6.2 Warning Logs**

Warning Logs are not to be archived.

**3.2.7.6.3 Schedule**

Archiving of logs shall be done on an ad hoc basis.

#### **3.2.7.7 Admin Tool Application**

Admin Tool application allows designated users to perform administrative functions.

**3.2.7.7.1 Maintenance Page**

Provide a landing page to indicate to users when eCoaching Admin Tool system is unavailable and under maintenance.

**3.2.7.7.2 Support Link**

Provide a link for each page to the following support site:

<https://cco.gdit.com/Resources/eCoaching/QSS/SitePages/Issue%20Tracker.aspx>

### 3.2.8 eCoaching Log Reporting

#### **3.2.8.1 Historical Dashboard Extract**

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

**3.2.8.1.1 Filters**

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

**3.2.8.1.2 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

**3.2.8.1.3 Permissions**

Employees with a job code ending in 40 (e.g. WACS40) should not be allowed to extract data from the Historical Dashboard to an Excel file.

#### **3.2.8.2 Log Reporting**

Allow for reporting on coaching and warning log information.

**3.2.8.2.1 Reports to be On Demand**

Reports to be run on demand with criteria selected by the user and results presented on the screen.

**3.2.8.2.1.1 Permissions**

Only the individuals in eCoaching Engineering and Program teams and designated members of the Quality team shall have access to the reports and shall access only those reports which they have been granted entitlement to execute.

**3.2.8.2.1.2 eCL Coaching Log Summary**

A report of coaching log information based on selected criteria.

**3.2.8.2.1.2.1 Selection Criteria**

The coaching log summary report shall have the following criteria available:

Module or all modules – All, CSR, Supervisor, Quality, LSA, Training

Employee or all employees – Employee’s name regardless of current status

Site or all sites – Site or location of employee

Coaching reason or all coaching reasons – Coaching reason

Sub-coaching reason or all sub-coaching reasons – Sub-coaching reasons for selected coaching reason or all sub-coaching reasons

Status or all statuses – Current status of the log

Start date – based on the logs’ submitted date

End date – based on the logs’ submitted date

**3.2.8.2.1.2.2 Data Elements**

For the data elements to be reported on, see appendix 7.1 Reporting Data Elements.

**3.2.8.2.1.3 eCL Warning Log Summary**

A report of warning log information based on the selected criteria.

**3.2.8.2.1.3.1 Selection Criteria**

The warning log summary report shall have the following criteria available:

Module or all modules – All, CSR, Supervisor, Quality, LSA, Training

Employee or all employees – Employee’s name regardless of current status

Site or all sites – Site or location of employee

Warning reason or all warning reasons – Verbal Warning, Written Warning, Final Warning, All Warnings

Sub-warning reason or all sub-warning reasons – For selected warning reason or all

Start date – based on the logs’ submitted date

End date – based on the logs’ submitted date

Status – Completed, Inactive, Both

State – Active, Expired, Both

**3.2.8.2.1.3.2 Data Elements**

For the data elements to be reported on, see appendix 7.2 Reporting Warning Data Elements.

**3.2.8.2.1.4 eCL Hierarchy Summary**

A report of employee hierarchy information based on the selected criteria.

**3.2.8.2.1.4.1 Selection Criteria**

The hierarchy summary report shall have the following criteria available:

Site or all sites – Site or location of employee

Employee or all employees – Employee’s name regardless of current status

**3.2.8.2.1.4.2 Data Elements**

For the data elements to be reported on, see appendix 7.3 Reporting Hierarchy Data Elements.

**3.2.8.2.1.5 eCL Administration Activity Summary**

A report of inactivation, reactivation and reassignment activity for coaching and warning logs based on selected criteria.

**3.2.8.2.1.5.1 Selection Criteria**

The administration activity report shall have the following criteria available:

Type of log – All, Coaching or Warning log

Form name or All form names – Form name of coaching or warning log or all form names

Activity – All, Inactivation, Reactivation, Reassignment

Start date – based on the logs’ activity date

End date – based on the logs’ activity date

**3.2.8.2.1.5.2 Data Elements**

For the data elements to be reported on, see appendix 7.4 Reporting Admin Activity Data Elements.

**3.2.8.2.1.6 eCL Internet Information Services Activity Log**

A report of activity stored in the Windows server Internet Information Services (IIS) logs.

**3.2.8.2.1.6.1 Selection Criteria**

The IIS activity report shall have the following criteria available:

Hourly with single date – based on the activity date/time (defaults to previous day)

Daily with Start and End date – based on the activity date (default to previous Sunday through Saturday)

Weekly with Start and End date – based on the activity date

Monthly with Start and End month – based on the activity date (select month only)

**3.2.8.2.1.6.2 Data Elements**

For the data elements to be reported on, see appendix 7.5 Reporting Internet Information Services Activity Data Elements.

Note:

When the report is Hourly, the activity is per hour starting at midnight server time

When the report is Daily, the activity is per day between the start date and end dates

When the report is Weekly, the activity is per week (Sunday to Saturday) between the start and end dates

When the report is Monthly, the activity is per month between the start and end months

**3.2.8.2.2 Scheduled Reports**

Some report will be scheduled to run on a regular basis as determined by the Program.

**3.2.8.2.2.1 Saved to file**

Scheduled reports will be saved as a file to an accessible file share.

**3.2.8.2.2.1.1 Location**

The report shall be saved to the following location:

\\F3420-ECLDBP01\Data\Coaching\Reports

Note:

The file will be encrypted and will have .zip.encrypt appended to the name

The location for the development environment is: \\F3420-ECLDBD01\Data\Coaching\Reports

The location for the test environment is: \\F3420-ECLDBT01\Data\Coaching\Reports

**3.2.8.2.2.1.2 Name**

The report shall be named as

eCL\_<report name>\_<module>\_<timeframe>.csv

where report name is the name assigned to the report

module is CSR, Supervisor, Quality, LSA, or Training

timeframe is start date and end date of the report in CCYYMMDD\_CCYYMMDD format

**3.2.8.2.2.1.3 Format**

The report shall be in a comma separated value (CSV) format.

**3.2.8.2.2.1.4 Encryption**

Reports generated shall be encrypted while stored on the file share.

**3.2.8.2.2.2 File Share Permissions**

Only the individuals in eCoaching Engineering and Program teams and designated members of the Quality team shall have permissions to the file share.

**3.2.8.2.2.2.1 User access level**

The Engineering staff will have read/write/modify access to the share. Designated Program and Quality staff will have read-only access.

**3.2.8.2.2.3 Notifications**

Email notifications may be sent upon completion of the report or if an error occurs.

**3.2.8.2.2.3.1 Completion Notification**

Upon completion of the report, email notifications shall be sent to the following distributions:

CCO Quality <CCOQuality@gdit.com>

**3.2.8.2.2.3.2 Error Notification**

If report terminates due to an error, email notifications shall be sent to the following distributions:

CCO Quality <CCOQuality@gdit.com>

Designated group in engineering

**3.2.8.2.3 Reports to be Scheduled**

The following reports will be scheduled to run on a regular basis as determined by the Program.

**3.2.8.2.3.1 eCL Coaching Log Monthly Summary**

A report of coaching log information for each module will be scheduled to run on the 3rd of each month for the previous month.

**3.2.8.2.3.1.1 Selection Criteria**

The following criteria shall be available

Module – One report will be generated for each module (CSR, Supervisor, Quality, LSA, Training)

Start date – the first day of the previous month (based on submitted date)

End date – the last day of the previous month (based on submitted date)

**3.2.8.2.3.1.2 Data Elements**

For the data elements to be reported on, see appendix 7.1 Reporting Data Elements.

### 3.2.9 eCoaching CSR Survey

Provide for employee’s to respond to an eCoaching Log related survey about their coaching experience.

#### **3.2.9.1 Survey Selection**

To receive an eCoaching Survey an employee

Must be active

Must not have already received a survey for the calendar month

Must have acknowledged and completed an eCoaching Log in the sampling period for the month

(note: coaching logs with a source of Verint-TQC will be excluded and not eligible for a survey)

**3.2.9.1.1 Exception**

If a survey expires after 5 days, then the employee won’t be eligible for another survey request in the same month, unless the Program team determines the response rate is lower than desired, then the next acknowledged and completed log for the employee will make them eligible again in the calendar month.

**3.2.9.1.2 Sampling Period**

Selection of completed logs will take place three times a month as follows:

On the 8th of the month, look for coaching logs completed between 1st and 8th

On the 15th of the month, look for coaching logs completed between 8th and 15th

On the 22nd of the month, look for coaching logs completed between 15th and 22nd

(note: if an employee has more than one completed log in the sampling period, the selection of the log for a survey should be random)

**3.2.9.1.3 Specific Logs**

Occasionally there may be a need to identify specific types of coaching logs to be subject to surveys. These could be for certain coaching reasons.

#### **3.2.9.2 Notification**

Employee will receive an email notification to complete the survey.

**3.2.9.2.1 eMail Format**

The following is the basic form of the eCoaching Survey eMail notification.

|  |
| --- |
| To – [to] |
| Subject – eCoaching Log Survey |
| \*\* This is an automated email. Do not reply to this email. \*\*   Please take time to complete this survey regarding a coaching session for [FormID]. This survey will expire on [ExpirationDate].  Please click here to open the survey form and respond to the questions. [Link to Survey Form]  (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 |

ExpirationDate will be calculated as 5 days from date the survey was created. The format will be MM/DD/CCYY.

**3.2.9.2.2 eMail Reminder**

The system will generate emails to remind employees to complete surveys.

**3.2.9.2.2.1 General Format**

The general format of eMails generated for reminders are the same as those through Notification of surveys.

**3.2.9.2.2.2 Selection Criteria**

The eCoaching log Surveys subject to reminders will those which meet the following criteria.

|  |
| --- |
| **Status** |
| Open |

**3.2.9.2.2.3 Time Frame**

The eCoaching log Survey reminder email will be sent using the following time frames:

|  |
| --- |
| **Reminder** |
| 48 hours after date/time initial email sent |

Note: email reminders will take place three times a month as follows:

On the 10th of the month

On the 17th of the month

On the 24nd of the month

**3.2.9.2.2.4 Email Priority**

The eCoaching log Survey reminder email will be sent with High Importance setting.

**3.2.9.2.2.5 Email Recipient**

The eCoaching log reminder email will be sent to the following:

|  |
| --- |
| **Recipient** |
| Recipient of survey |

**3.2.9.2.2.6 Email Subject**

The subject line of the email reminder will be the following:

eCoaching Log Survey Follow-up

**3.2.9.2.2.7 Email Message**

The message body of the email reminder will be the same as the initial survey email notification.

#### **3.2.9.3 Survey Form**

Display survey questions and allow for answers and responses from employee.

**3.2.9.3.1 eCoaching Log Logo**

The survey form should display the eCoaching Log logo.

**3.2.9.3.2 Survey Text**

The opening text for the survey shall be:

The CCO Leadership team is asking for your help in providing feedback on your coaching experience. Please take a few minutes to complete this survey. The details from the surveys will be used to improve the effectiveness, content and delivery of discussions regarding your performance. Your comments and feedback will be anonymous and will not be attributed directly to your individual survey.

**3.2.9.3.3 eCoaching Log Link**

Provide a link to the corresponding eCoaching Log with text of:

This survey is for [FormID]

Review form to display the same information as shown from the dashboard.

**3.2.9.3.4 Survey Questions**

Display a list of selected survey questions as determined by the Program team.

**3.2.9.3.4.1 Display Questions**

Only display the questions when the survey is uncompleted and active. If the survey has been completed or inactivated then do not display the survey questions.

**3.2.9.3.4.2 Survey Questions**

The number and content of survey questions may vary from month to month. Some questions may be optional and not always applicable. The questions may also vary by site. Survey questions are documented in the following located in TFS eCoaching\_V2\Requirements\CCO\_eCoaching\_Log\_Survey\_Questions.xlsx.

**3.2.9.3.4.3 Survey Responses**

Available responses may vary and is determined by the question being asked. They may be in the form of Yes/No, a rating scale of 1 to 5, and/or N/A for Not Applicable. Responses will also allow for entry of free form text of up to 4000 characters. Response selections are required, but free form text responses are not.

**3.2.9.3.4.4 Maintenance**

Responses shall remain associated with the original question even if subsequent surveys have different questions and response options.

**3.2.9.3.4.5 Default Responses**

There shall not be any pre-selected answers or default responses for survey questions.

**3.2.9.3.5 Hot Topic**

Occasionally an additional question may be added to a survey representing an important timely topic. The Hot Topic question may change from month to month, within a calendar month or may not be utilized at all.

**3.2.9.3.5.1 Mid-month Hot Topic**

If Hot Topic is added during a calendar month, those employees who have already received a survey without a Hot Topic question will not need to respond again.

#### **3.2.9.4 Information**

In addition to survey responses and any free form text entered, the following information may need to be available for reporting:

Date of creation (date when survey was created for employee)

Expiration date (date survey actually expired without responses)

Completed date (date survey responses were submitted)

Inactivation date (date survey was inactivated)

Inactivation reason (text describing why survey inactivated)

Status (status representing whether the survey is new or open, completed or inactivated)

Link to the corresponding eCoaching Log with its associated information

#### **3.2.9.5 Inactivation/Deletion**

Surveys may be inactivated or deleted.

**3.2.9.5.1 Five Day Inactivation**

Surveys which remain uncompleted 5 days after creation will be inactivated.

**3.2.9.5.2 Individual Inactivation**

Individual surveys will be inactivated whether completed or uncompleted when the corresponding eCoaching Log is inactivated.

**3.2.9.5.3 Employee Status**

Employee records which have Active status of T (termed) or D (deceased) in PeopleSoft will have their uncompleted surveys inactivated.

**3.2.9.5.4 Individual Deletions**

Individual surveys will be deleted whether completed or uncompleted when the corresponding eCoaching Log is deleted.

#### **3.2.9.6 Survey Recipients**

Recipients of eCoaching Log Surveys will be those employees in the CSR module.

### 3.2.10 eCoaching Log Generation

#### **3.2.10.1 Quality Log Generation**

Generate Quality group eCoaching logs from information queried from existing coaching logs.

**3.2.10.1.1 Selection of logs**

The selection of existing coaching logs which will generate new coaching logs will be those which:

Employees are currently active

Source is Indirect Verint-GDIT

Existing log from Quality Call Monitoring (QCM) and not Providing Peace of Mind (PPoM)

Status is Completed or Pending (not Inactive)

Submitted within the previous week (Sunday to Saturday)

|  |  |
| --- | --- |
| **Log Type** | **Additional Criteria** |
| NPN | Existing log’s text description contains an NPN code (#NPNFFM1, #NPNFFM2, #NPNFFM3, #NPNFFM4, #NPNFFM5) |

**3.2.10.1.2 Schedule**

Logs will be generated on Monday for the previous week after all other processing has been completed except email notifications.

**3.2.10.1.3 Module Information**

The module of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Module** |
| NPN | Customer Service Representative |

**3.2.10.1.4 Source**

The source of the coaching log shall be as follows:

|  |  |
| --- | --- |
| **Log Type** | **Source** |
| NPN | Internal CCO Reporting |

**3.2.10.1.5 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**3.2.10.1.6 Customer Service Escalation information**

The customer service escalation of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Customer Service Escalation** |
| NPN | Not Applicable |

**3.2.10.1.7 eCoaching Log Status**

The status of the eCoaching log will be as follows:

|  |  |
| --- | --- |
| **Log Type** | **Status** |
| NPN | Pending Supervisor Review |

**3.2.10.1.8 Coaching Reasons and Sub-Coaching Reasons**

The coaching reasons, sub-coaching reasons, and opportunity/reinforcement for the logs shall be as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Log Type** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| NPN | Current Coaching Initiative | Opportunity | Other: Specify reason under coaching details. |

**3.2.10.1.9 Recipient of coaching log**

The recipient of the eCoaching Log shall be the employee id in the existing coaching log.

**3.2.10.1.10 Site information**

The site of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Site** |
| NPN | From employee record |

**3.2.10.1.11 Program information**

The program of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Program** |
| NPN | From employee record |

**3.2.10.1.12 Reviewer information**

The reviewer of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Customer Service Escalation** |
| NPN | Determined by the current existing hierarchy, the module and the status of the coaching log |

**3.2.10.1.13 Event Date**

The date of coaching or event of the eCoaching Log will be the Event Date from the existing log.

**3.2.10.1.14 Start Date**

The start date of the eCoaching Log will be the Event Date of the new log generated.

**3.2.10.1.15 Submitted Date**

The submitted date of the eCoaching Log will be the system date at time the new log is generated.

**3.2.10.1.16 Submitter**

The submitter of the eCoaching Log shall be 999999.

**3.2.10.1.17 Email notification**

Email notifications for Quality Generated coaching logs will be sent as follows:

|  |  |
| --- | --- |
| **Log Type** | **Status** |
| NPN | Email notifications for NPN coaching logs will be sent to the coaching log recipient’s supervisor. |

**3.2.10.1.18 Report Details**

The report details of the eCoaching Log will be as follows:

|  |  |
| --- | --- |
| **Report Code** | **Report Details** |
| NPN | A concatenation of specific text depending on the NPN code in the feed file followed by the actual NPN code and a Verint ID |

**3.2.10.1.19 Description Text**

Include the following text in the description for eCoaching Logs:

|  |  |  |
| --- | --- | --- |
| **Report Code** | **NPN Code** | **Fields from Feed File** |
| NPN | #NPNFFM1 | When completing an application, CSRs are required to ask consumers the question “Tell us if you’re getting help from one of these people.” If the consumer indicates that they are receiving help from a Navigator, Certified Application Counselor, Agent/Broker, or non-Navigator assistance personnel, the CSR must enter the national producer number (NPN) in the appropriate field.  On this call a new application was started but the consumer was not asked if he or she had been assisted. Please make certain to ask this required question on future calls. <Report Details – NPN code from feed file > Verint ID: <Verint ID> |
| #NPNFFM2 | When completing an application, CSRs are required to ask consumers the question “Tell us if you’re getting help from one of these people.” If the consumer indicates that they are receiving help from a Navigator, Certified Application Counselor, Agent/Broker, or non-Navigator assistance personnel, the CSR must enter the national producer number (NPN) in the appropriate field.  On this call a new application was started, the consumer indicated they had assistance, but the NPN was not entered in the appropriate field. Please make certain to enter the NPN information correctly on future calls. <Report Details – NPN code from feed file > Verint ID: <Verint ID> |
| #NPNFFM3 | When updating an application, CSRs are required to ask consumers the question “Tell us if you’re getting help from one of these people.” If the consumer indicates that they are receiving help from a Navigator, Certified Application Counselor, Agent/Broker, or non-Navigator assistance personnel, the CSR must enter the national producer number (NPN) in the appropriate field.  On this call the application was updated using Reporting a Life Change but the consumer was not asked if he or she had been assisted. Please make certain to ask this required question on future calls. <Report Details – NPN code from feed file > Verint ID: <Verint ID> |
| #NPNFFM4 | When updating an application, CSRs are required to ask consumers the question “Tell us if you’re getting help from one of these people.” If the consumer indicates that they are receiving help from a Navigator, Certified Application Counselor, Agent/Broker, or non-Navigator assistance personnel, the CSR must enter the national producer number (NPN) in the appropriate field.  On this call the application was updated using Reporting a Life Change and the consumer indicated they had assistance, but the NPN was not entered in the appropriate field. Please make certain to enter the NPN information correctly on future calls. <Report Details – NPN code from feed file > Verint ID: <Verint ID> |
| #NPNFFM5 | When updating an application, CSRs are required to ask consumers the question “Tell us if you’re getting help from one of these people.” If the consumer indicates that they are receiving help from a Navigator, Certified Application Counselor, Agent/Broker, or non-Navigator assistance personnel, the CSR must enter the national producer number (NPN) in the appropriate field.  On this call the application was updated using Reporting a Life Change. There was data in the application indicating the consumer was assisted. The consumer was not asked if he or she had been assisted in order to confirm the validity of the information in the application. Please make certain to ask this required question on future calls. <Report Details – NPN code from feed file > Verint ID: <Verint ID> |

### 3.2.11 Secure Sensitive eCoaching Information

#### **3.2.11.1 Feed Files**

Files received to generate eCoaching logs, regardless of original source, shall be encrypted and secured while at rest on the file share.

**3.2.11.1.1 Processing**

Encrypted files may be decrypted while being processed, but shall be encrypted upon completion.

**3.2.11.1.2 File Retention**

Encrypted files shall be retained for the length of time specified in the retention policy determined by the Program.

#### **3.2.11.2 Temporary Tables**

Tables used temporarily to store data during processing of eCoaching records do not need to have data encrypted.

**3.2.11.2.1 Data Retention**

Data in temporary tables shall be removed upon completion of processing.

#### **3.2.11.3 Database Columns**

Columns in database tables which contain sensitive information shall be encrypted. Such information includes, but not limited to, those columns which contain a form of the employee name, LAN ID, and email address.

**3.2.11.3.1 Other employee information**

Columns which contain other important employee information such as employee id, job code, job description, and status do not need to be encrypted.

**3.2.11.3.2 User entered comments**

Columns which contain user entered comments such as description, coaching notes, comments, and survey responses do not need to be encrypted.

#### **3.2.11.4 Web Browser Session**

Web interface browser session should time out if there is no user activity or interaction.

**3.2.11.4.1 Session Timeout**

If there is no user activity or interaction with the eCoaching application in 30 minutes, the session should time out. Display a notice of pending session timeout at 20 minutes of no activity.

## 3.3 Performance Requirements

N/A

## 3.4 Design Constraints

N/A

## 3.5 Software System Attributes

N/A

# 4.0 Glossary

N/A

# 5.0 Index

N/A

# 6.0 Attachments

N/A

# 7.0 Appendix

## 7.1 Reporting Data Elements

The following information shall be included in each report:

|  |  |  |
| --- | --- | --- |
| **Number** | **Field** | **Description** |
| 1 | Module ID | Module the log was submitted in |
| 2 | Module Name | Name of the module |
| 3 | Coaching ID | ID of the coaching log |
| 4 | Form name | Coaching log form name |
| 5 | Status | Current status of the coaching log |
| 6 | Employee ID | Employee ID of the log recipient |
| 7 | Employee name | The last, first mi name of employee |
| 8 | City | Site of the employee |
| 9 | Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the log is submitted |
| 10 | Supervisor name | The last, first mi name of supervisor of employee |
| 11 | Manager employee ID | Employee ID of the manager of the log recipient at time log is submitted |
| 12 | Manager name | The last, first mi name of manager of employee |
| 13 | Current Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the report is run |
| 14 | Current Supervisor name | The last, first mi name of supervisor of employee |
| 15 | Current Manager employee ID | Employee ID of the manager of the log recipient at time the report is |
| 16 | Current Manager name | The last, first mi name of manager of employee |
| 17 | Review Supervisor employee ID | Employee ID of the supervisor who reviewed/coached the log recipient |
| 18 | Review Supervisor name | The last, first mi name of supervisor of employee |
| 19 | Review Manager employee ID | Employee ID of the manager who reviewed the log |
| 20 | Review Manager name | The last, first mi name of manager of employee |
| 21 | Description | Description or behavior subject to coaching |
| 22 | Coaching notes | Coaching notes for log |
| 23 | Event date | Date of event associated with log |
| 24 | Coaching date | Date of coaching associated with log |
| 25 | Submitted date | Date the log was submitted |
| 26 | Coaching source | Source of coaching (Direct, Indirect) |
| 27 | Sub-coaching source | How the coaching was identified |
| 28 | Coaching reason | Coaching reason of log |
| 29 | Coaching sub-reason | Coaching sub-reason of log |
| 30 | Value | Value of log (Opportunity, Reinforcement,…) |
| 31 | Submitter ID | Employee ID of the submitter of the log |
| 32 | Submitter name | Name of the submitter of the log |
| 33 | Supervisor reviewed date | Date/time supervisor reviewed and acknowledged the coaching log |
| 34 | Manager reviewed manual date | Date/time manager entered when reviewed and acknowledged the coaching log |
| 35 | Manager reviewed auto date | Date/time manager reviewed and acknowledged the coaching log |
| 36 | Manager notes | Comments or notes entered by manager |
| 37 | Employee reviewed date | Date when the recipient reviewed and acknowledged or entered comments. |
| 38 | Employee comments | Comments entered by employee |
| 39 | Program | Program associated with the log (Medicare, Marketplace, NA) |
| 40 | Behavior | Behavior associated with the log in the Training module (Production, Training, Other) |
| 41 | Report Code | Report code of log related to input data feed |
| 42 | Verint ID | ID of the Verint call record scorecard associated with the coaching log |
| 43 | Verint Form name | Form name in Verint related to coaching log |
| 44 | Coaching Monitor | Whether the log from Verint is a coaching monitor (Yes, No) |
| 45 | Report Date | Date and time the report was run in CCYY-MM-DD HH:MI:SS.decimal. Note, this is for scheduled reports only. |

## 7.2 Reporting Warning Data Elements

The following information shall be included in each report:

|  |  |  |
| --- | --- | --- |
| **Number** | **Field** | **Description** |
| 1 | Module ID | Module the log was submitted in |
| 2 | Module Name | Name of the module |
| 3 | Warning ID | ID of the warning log |
| 4 | Form name | Warning log form name |
| 5 | Status | Current status of the warning log (Completed, Inactive) |
| 6 | State | Current state of the warning log (Active, Expired) |
| 7 | Employee ID | Employee ID of the log recipient |
| 8 | Employee name | The last, first mi name of employee |
| 9 | City | Site of the employee |
| 10 | Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the log is submitted |
| 11 | Supervisor name | The last, first mi name of supervisor of employee |
| 12 | Manager employee ID | Employee ID of the manager of the log recipient at time log is submitted |
| 13 | Manager name | The last, first mi name of manager of employee |
| 14 | Current Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the report is run |
| 15 | Current Supervisor name | The last, first mi name of supervisor of employee |
| 16 | Current Manager employee ID | Employee ID of the manager of the log recipient at time the report is |
| 17 | Current Manager name | The last, first mi name of manager of employee |
| 18 | Warning given date | Date warning log was given |
| 19 | Submitted date | Date the log was submitted |
| 20 | Expiration date | Date the warning log will or did expire (Warning given date + 91 days) |
| 21 | Warning source | Source of warning (Direct, Indirect) |
| 22 | Sub-coaching source | How the warning was identified |
| 23 | Warning reason | Warning reason of log |
| 24 | Warning sub-reason | Warning sub-reason of log |
| 25 | Value | Value of log (Opportunity) |
| 26 | Submitter ID | Employee ID of the submitter of the log |
| 27 | Submitter name | Name of the submitter of the log |
| 28 | Program | Program associated with the log (Medicare, Marketplace, NA) |
| 29 | Behavior | Behavior associated with the log in the Training module (Production, Training, Other) |

## 7.3 Reporting Hierarchy Data Elements

The following information shall be included in each report:

|  |  |  |
| --- | --- | --- |
| **Number** | **Field** | **Description** |
| 1 | Employee ID | Employee ID of the log recipient |
| 3 | Employee name | The last, first mi name of employee |
| 4 | City | Site of the employee |
| 5 | Employee job code | Job code of the employee |
| 6 | Employee job description | Job description/title of the employee |
| 7 | Program | Program associated with the employee (Medicare, Marketplace, NA) |
| 8 | Supervisor employee ID | Employee ID of the supervisor of the log recipient at time the report is run |
| 9 | Supervisor name | The last, first mi name of supervisor of employee |
| 10 | Supervisor job code | Job code of the supervisor |
| 11 | Supervisor job description | Job description/title of the supervisor |
| 12 | Manager employee ID | Employee ID of the manager of the log recipient at time the report is |
| 13 | Manager name | The last, first mi name of manager of employee |
| 14 | Manager job code | Job code of the manager |
| 15 | Manager job description | Job description/title of the manager |
| 16 | Start date | Start or hire date of the employee |
| 17 | End date | End or termination date of the employee |
| 18 | Status | Status of the employee |
| 19 | Aspect Job Title | Employee job code from Aspect |
| 20 | Aspect Skill | Employee program from Aspect |
| 21 | Aspect Status | Employee status from Aspect |

## 7.4 Reporting Admin Activity Data Elements

The following information shall be included in each report:

|  |  |  |
| --- | --- | --- |
| **Number** | **Field** | **Description** |
| 1 | Module ID | Module the log was submitted in |
| 2 | Module Name | Name of the module |
| 3 | Form name | Coaching or warning log form name |
| 4 | Last known status | The last known status of the log prior to activity |
| 5 | Action | Action or activity which occurred (or ‘Reassignment’ for reassigned logs) |
| 6 | Action date | Date of activity |
| 7 | Requester ID | The employee id of person requesting the activity |
| 8 | Requester name | The last, first mi name of person requesting the activity |
| 9 | Assigned to ID | The employee id of person the log is reassigned to (‘-‘ if not applicable) |
| 10 | Assigned to name | The last, first mi name of person the log is reassigned to (‘-‘ if not applicable) |
| 11 | Reason | Reason selected for the activity |
| 12 | Requester comments | Additional comments entered by the requester |

## 7.5 Reporting Internet Information Services Activity Data Elements

The following information shall be included in each report:

|  |  |  |
| --- | --- | --- |
| **Number** | **Field** | **Description** |
| 1 | New Submission Hits | Number of times the eCL New Submissions page is accessed during the selected period |
| 2 | New Submission Users | Number of users who accessed the eCL New Submissions page during the selected period |
| 3 | My Dashboard Hits | Number of times the eCL My Dashboard page is accessed during the selected period |
| 4 | My Dashboard Users | Number of users who accessed the eCL My Dashboard page during the selected period |
| 5 | Historical Dashboard Hits | Number of times the eCL Historical Dashboard page is accessed during the selected period |
| 6 | Historical Dashboard Users | Number of users who accessed the eCL Historical Dashboard page during the selected period |
| 7 | Review Hits | Number of times the eCL Review page is accessed during the selected period |
| 8 | Review Users | Number of users who accessed the eCL Review page during the selected period |