

**Title: eCoaching Log**

**Functional Specification**

|  |  |  |
| --- | --- | --- |
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# 1.0 Software Project Introduction

## 1.1 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

N/A

### 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

**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 eCL tab is done by validating the users LAN ID against a hierarchy table which is populated by Peoplesoft and eWFM based data. The LAN ID comes from the Peoplesoft feed.

**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

LAN ID of the selected employee

Log ID generated by the system

Example eCL-Jane.Doe-12345

**3.2.1.1.6.1 Unique**

The form name for eCoaching Logs shall be unique.

#### **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** |
| AHT | 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. |
| 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 | ETS (note available for direct coaching only by supervisors and managers – WSAQ70, WACS40, WACS50, WACS60)  Other: Specify reason under coaching details. |
| CCO Process Procedure Issues | Opportunity or Reinforcement | Security and Privacy Incident  Other: Specify reason under coaching details. |
| Current Coaching Initiatives | Opportunity or Reinforcement | 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: Open Calls  OMR: Short Calls – Inbound  OMR: Short Calls – Outbound  Other: Specify reason under coaching details. |
| Quality | Opportunity or Reinforcement | Accuracy / Completeness  Admin Procedure  CSAT  Customer Service  Privacy  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | 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** |
| AHT | 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. |
| 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 | 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 | 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: Open Calls  OMR: Short Calls – Inbound  OMR: Short Calls – Outbound  Other: Specify reason under coaching details. |
| Quality | Opportunity or Reinforcement | Accuracy / Completeness  Admin Procedure  CSAT  Customer Service  Privacy  Other: Specify reason under coaching details. |
| Recognition | Reinforcement | 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 | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**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, at least 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

Completed when coaching log is Direct, not CSE, and Quality Specialist Coaching

Pending Employee Review when coaching log is Direct, not CSE and not Quality Specialist Coaching

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 – WHER13, WHHR11, WHHR12, WHHR13, WHHR14, WHHR70, WHHR80, WHRC11, WHRC12, WHRC13 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** |
| AHT | 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. |
| Attendance | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| CCO Process Procedure | Opportunity or Reinforcement | CCO Learning  CUP  Desk to Desk  Security and Privacy Incident  Other: Specify reason under coaching details. |
| Coaching | Opportunity or Reinforcement | Quality eCL Coaching  Supervisor eCL Coaching  Other: Specify reason under coaching details. |
| Corporate and Program Compliance | Opportunity or Reinforcement | Annual Review  CoR  eRes  IPC  ISO  Mandatory Training  Secure Floor Policy  Other: Specify reason under coaching details. |
| ETS | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| KUDOS | Reinforcement | Other: Specify reason under coaching details. |
| Professional Development | Opportunity or Reinforcement | Business Acumen  Critical Thinking  IDP  Leadership Skills  Other: Specify reason under coaching details. |
| Quality Performance | Opportunity or Reinforcement | Customer Satisfaction  PPoM  Verint  Other: Specify reason under coaching details. |
| Reports Catalogue | Opportunity or Reinforcement | Incorrect Escalation: ARC  Incorrect Escalation: DMEPOS  Incorrect Escalation: EE / MM  Incorrect Escalation: RME  Incorrect Transfers  ISG Usage  OMR: Default Qualifier  OMR: Short Calls Inbound  OMR: Short Calls Outbound  OMR: Cancelled Calls  OMR: Open Calls  Other: Specify reason under coaching details. |
| Schedule Adherence | Opportunity or Reinforcement | Other: Specify reason under coaching details. |
| Customer Service Escalation (available only if the log is a CSE) | Opportunity | Argues  Blind transfers call  Encourages / commits fraud  Intentionally disconnects caller  Threatens caller / employee  Uses derogatory/disrespectful words  Uses profanity of any kind  Verbally abusive  Yells, screams  Other: Specify reason under coaching details. |

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

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

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

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

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

**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.

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, at least 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, WISY13, 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, WPOP60, WPPM60, WPPM70, WPPM80, WPPT60, WPWL51

Others:

WISO13 – Software Engineer

WISY13 – Systems Analyst

WSTE13 – 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 | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Written Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |
| Final Written Warning | Opportunity | Attendance  Conduct (including Call Avoidance)  ETS  Quality/Performance  Security or Privacy Issue  Other Policy (non-Security/Privacy) |

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

**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, at least 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, WISY13, WPPM12, WPPM13

Supervisor / Lead – WACQ13, WACQ40

Manager – WSQA50, WEEX90, WEEX91, WSQA70

Others:

WISO13 – Software Engineer

WISY13 – Systems Analyst

WSTE13 – 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.

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

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

**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: WPPT40 – Supervisor, Project/Task

WPPT50 – Manager, Project/Task

WPPT60 – Sr Manager, Project/Task

WISA12 – Administrator, Systems

WISO13 – Software Engineer

WISY13 – Systems Analyst

WSTE13 – Testing Engineer

WPOP70 – Director, Operations

WIHD40 - Supervisor, Help Desk

WIHD50 - Manager, Help Desk

WABA11 - Associate Administrator, Business

**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:

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

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

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

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

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

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

**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, at least 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 – WPOP70 – Director, Operations

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.”

### 3.2.2 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 |

**3.2.2.1.2 Pending Employee Review**

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

When an eCoaching Log is submitted and the coaching is Direct and the source is “Quality Specialist Coaching” and the status is Complete, then no system generated eMail is sent.

#### **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 in the CSR module only.

**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**

When an eCoaching Log is submitted for an IAE (Inappropriate ARC Escalation) 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.

**3.2.2.2.4 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) data feed. eCoaching Logs from IQS are considered to be Indirect in the CSR module only.

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

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

**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 |

### 3.2.3 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 CSR module.

**3.2.3.1.2 Generic Reports**

The following are the generic OMR data feed reports.

|  |  |
| --- | --- |
| **OMR Report Code** | **Report** |
| CAN | OMR: Cancelled Calls |
| DFQ | OMR: Default Qualifiers |
| OPN | OMR: Open Calls |
| ISQ | OMR: Short Calls Inbound |
| OSC | OMR: Short Calls Outbound |
| ACW | OMR: ACW |
| AHT | OMR: AHT |
| SPI | OMR: CCO Security and Privacy Incident Coaching |
| ACO | OMR: Inappropriate ACO Escalation |
| IDE | OMR: Inappropriate DME Escalation |
| IEE | OMR: Inappropriate EE/MM Escalation |
| INF | OMR: Inappropriate NGD Feedback |
| ISG | OMR: ISG Consults |
| NIT | OMR: NGD Inappropriate Transfer |
| RME | OMR: Returned MAC Escalation |
| SLG | OMR: Scripts Logged |
| TRN | OMR: Transfers |
| TR2 | OMR: FFM T2 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 following are the OMR data feed reports for assignment to the employee’s supervisor to review.

|  |  |
| --- | --- |
| **OMR Report Code** | **Report** |
| IAE | OMR: Inappropriate ARC Escalation |
| IAT | OMR: Inappropriate ARC Transfers |

**3.2.3.1.5 OMR Feed File Layout**

CCO\_eCoaching\_Log\_OMR\_Layout.docx identifies the fields and layout of IAE, IAT 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:

\\vrivscors01\BCC Scorecards\Coaching\Outliers

**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

**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.

**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** |
| CAN | OMR/Exceptions | Research Required | OMR: Cancelled Calls |
| DFQ | OMR/Exceptions | Research Required | OMR: Default Qualifiers |
| OPN | OMR/Exceptions | Research Required | OMR: Open Calls |
| ISQ | OMR/Exceptions | Research Required | OMR: Short Calls Inbound |
| OSC | OMR/Exceptions | Research Required | OMR: Short Calls Outbound |
| ACW | OMR/Exceptions | Research Required | OMR: ACW |
| AHT | OMR/Exceptions | Research Required | OMR: AHT |
| SPI | OMR/Exceptions | Research Required | OMR: CCO Security and Privacy Incident Coaching |
| ACO | OMR/Exceptions | Research Required | OMR: Inappropriate ACO Escalation |
| 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 |
| NIT | OMR/Exceptions | Research Required | OMR: NGD Inappropriate Transfer |
| RME | OMR/Exceptions | Research Required | OMR: Returned MAC Escalation |
| SLG | OMR/Exceptions | Research Required | OMR: Scripts Logged |
| TRN | OMR/Exceptions | Research Required | OMR: Transfers |
| TR2 | OMR/Exceptions | Research Required | OMR: FFM T2 Transfers |
| LCS | OMR/Exceptions | Research Required | OMR: Low CSAT |
| IAE | OMR/Exceptions | Research Required | OMR: Inappropriate ARC Escalation |
| IAT | OMR/Exceptions | Research Required | OMR: Inappropriate ARC 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.” |
| 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 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 from the input feed.

**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.

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

Lime Survey and Verint are the source systems for quality eCoaching Logs. Some eCoaching Logs will be from Independent Quality Assurance (IQA). A Pending Acknowledgment 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.

**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 Active Evaluations**

Records will contain active evaluations only.

**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. A zero byte file will be created and sent on the weekends (Saturday and Sunday). The Monday file will include weekend changes and additions.

**3.2.3.2.1.6 Scorecard Types**

Include the following Scorecard Types in the data file:

LimeSurvey

Verint-GDIT

Verint-GDIT Supervisor

Verint-TQC

**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. Updated logs must still be Open and the fields to be updated are Opportunity/Reinforcement, Description. Matching records are those which have the same Evaluation ID.

**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:

\\vrivscors01\BCC Scorecards\Coaching\Apps\Encryption\Encrypt\_out

Note: the file will need to be decrypted prior to processing.

**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

**3.2.3.2.5 Source**

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

|  |  |
| --- | --- |
| **Source Value** | **Source of Information** |
| LimeSurvey | LimeSurvey scorecards for Written Correspondence and eMail |
| Verint-GDIT | Verint scorecards with GDIT 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:

|  |  |  |
| --- | --- | --- |
| **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-Reason** |
| Quality | Did not meet goal  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

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

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

**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:

|  |  |
| --- | --- |
| **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 .2 ETS Reports for Supervisors**

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

|  |  |
| --- | --- |
| **ETS Report Code** | **Report** |
| EOT | Exempt Over Time |
| EA | Excused Absence |
| HOLA | Incorrect Holiday (Approver) |
| ITDA | Invalid Timecodes Direct (Approver) |
| ITIA | Invalid Timecodes Indirect (Approver) |
| FWHA | Future Hours Worked (Approver) |
| OAE | Outstanding Acton (Employee) |
| 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:

\\vrivscors01\BCC Scorecards\Coaching\ETS\

**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, and FWHA:

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.

**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.

**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. For Outstanding Action (Employee) and Outstanding Action (Supervisor) reports, the date of coaching or event will be the Time Period.

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

**3.2.3.3.5.7 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.

### 3.2.4 Dashboard Display

#### **3.2.4.1 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.

**3.2.4.1.1 Access to Dashboards**

Access to dashboard tabs will be dependent upon the employee or users job code.

**3.2.4.1.1.1 Main Dashboard (My Dashboard)**

The following shall have access to eCoaching Log My Dashboard:

CSR level users – WACS0\*

Supervisor level users - \*40,WTTR12,WTTI\*

Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL\*

Support Staff users – WSQE\*, WACQ\*, WIHD\*

All other users with eCoaching access and which do not have an ‘Unknown’ job code

Human Resources users – WHER13, WHHR11, WHHR12, WHHR13, WHHR14, WHHR70, WHHR80, WHRC11, WHRC12, WHRC13 will not have access

**3.2.4.1.1.2 Submitted Dashboard (My Submissions)**

The following shall have access to eCoaching Log My Submissions:

Supervisor level users - \*40,WTTR12, WTTI\*

Manager Level users - \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WEEX\*, WISY\*, WPWL\*

Support Staff users – All other users except for users with CSR Job codes – WACS01, WACS02, WACS03, unless they are in the database table “EC.Historical\_Dashboard\_ACL” table as an ARC CSR (Role = “ARC”) – WACS01, WACS02, WACS03

All other users with eCoaching access and which do not have an ‘Unknown’ job code

Human Resources users – WHER13, WHHR11, WHHR12, WHHR13, WHHR14, WHHR70, WHHR80, WHRC11, WHRC12, WHRC13 will not have access

**3.2.4.1.1.3 Historical (Historical Dashboard)**

The following shall have access to eCoaching Log My Submissions:

Supervisor and above level users - \*40, \*50, \*60, \*70, WISO\*, WSTE\*, WPPM\*, WPSM\*, WSQE\*, WACQ\*, WEEX\*, WISY\*, WPWL\*

Human Resources users – WHER\*, WHHR\*, WHRC\*

**3.2.4.1.1.4 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.

**3.2.4.1.1.5 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.

**3.2.4.1.1.6 Senior Managers**

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

**3.2.4.1.2 Inactive logs**

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

**3.2.4.1.3 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.

The Dashboard filters will contain the following values:

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Values** |
| 1 | Location | All Locations  Arlington  Bogalusa  Chester  Coralville  Corbin  Hattiesburg  Lawrence  London  Lynn Haven  Phoenix  Riverview  Sandy  Waco  Winchester  Note: initial default is All Locations |
| 2 | Employee | All Employees  Last name, First name, MI  Note: initial default is All Employees |
| 3 | Supervisor | All Supervisors  Last name, First name, MI  Note: initial default is All Supervisors |
| 4 | Manager | All Managers  Last name, First name, MI  Note: initial default is All Managers |
| 5 | Submitter | All Submitters  Last name, First name, MI  Unknown  Note: initial default is All Submitters |
| 6 | Status | All Statuses  Completed  Pending Acknowledgement  Pending Deputy Program Manager Review  Pending Employee Review  Pending Manager Review  Pending Quality Lead Review  Pending Sr. Manager Review  Pending Supervisor Review  Note: initial default is All Statuses |
| 7 | Value | All Values  Did not meet goal  Met goal  Opportunity  Opportunity-PWC  Reinforcement  Research Required  Note: initial default is All Values |
| 8 | Source | All Sources  ARC  CCO Security and Privacy Incident Coaching  CMS Contractor (NGS, VCS) Reported Issue  CMS Reported Item  CSAT  CSET  CSR Reported Issue  DMEPOS Escalations  ETS  Integrated Performance Center  Internal CCO Reporting  IQS  Leadership Listening  LimeSurvey  Manager Coaching  OMR  Other  Quality Call Listening  Quality Specialist Coaching  Supervisor Coaching  Training and Development  Verint Quality Monitoring  Verint-GDIT  Verint-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 |

**3.2.4.1.4 Employee Dashboard**

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

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

**3.2.4.1.4.1 Employee Dashboard Filters**

This dashboard does not have any additional filters.

**3.2.4.1.5 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. The Created Date will be the date and time the record is created and shall be displayed noting the web server time zone (e.g. PDT for Pacific Daylight Time). Supervisors will be able to view Warning eCoaching Logs for their direct reports.

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

**3.2.4.1.5.1 Supervisor Dashboard Filters**

The Supervisor dashboard contains the following additional filters.

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

**3.2.4.1.6 Manager Dashboard**

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

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

**3.2.4.1.6.1 Manager Dashboard Filters**

The Manager dashboard contains the following additional filters.

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

**3.2.4.1.7 Quality/Training Supervisor Dashboard**

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** | |
| 1 | My Pending eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Pending Supervisor Review  or Status = Pending Acknowledgment  or Status = Pending Employee Review  or Status = Pending Quality Lead Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | No Pagination (Show all records)  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 2 | My Teams Pending eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Pending Employee Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 3 | My Teams Completed eCoaching Logs | Supervisor Name = current user  Role = Supervisor  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 4 | My Completed eCoaching Logs | Employee Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 5 | My Teams Warning eCoaching Logs | Supervisor Name = current user  Role = Supervisor (Quality; Training) | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-Coaching Reason)  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. | |
| 6 | My Submitted Pending eCoaching Logs | Submitter Name = current user  Role = Support Staff | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 7 | My Submitted Completed eCoaching Logs | Submitter Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

**3.2.4.1.7.1 Quality/Training Supervisor Dashboard Filters**

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

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Dashboard – My Team’s Pending eCoaching Logs** | |
| A | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Source | Includes a list of possible source values of coaching logs. |
| 2 | **My Dashboard – My Team’s Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| D | Submitted | Will include coaching logs which were submitted or created between the entered start and end date range. |
| 3 | **My Dashboard – My Team’s Warning eCoaching Logs** | |
| A | State | Includes a list of possible state values of warning logs such as active or expired. |
| B | Submitted | Will include warning logs which were submitted or created between the entered start and end date range. |
| 4 | **My Submissions – My Submitted Pending eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| 5 | **My Submissions – My Submitted Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |

**3.2.4.1.8 Support Staff Dashboard**

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Section** | **Filter** | **Displayed Fields** | **Sort Options** |
| 1 | My Pending eCoaching Logs | Name = current user  Role = Support Staff  Status = Pending Acknowledgment, Pending Employee Review | FormID (w/Link to form)  Employee Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | No Pagination (Show all records)  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 2 | My Teams Pending eCoaching Logs | Name = current user  Role = Support Staff  Status = Pending Acknowledgement, Pending Employee Review, Pending Supervisor Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 3 | My Teams Completed eCoaching Logs | Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Source  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 4 | My Completed eCoaching Logs | Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 5 | My Teams Warning eCoaching Logs | Supervisor Name = current user  Role = Support Staff | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Warning Type (Coaching Reason)  Warning Reasons(s) (Sub-Coaching Reason)  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 6 | My Submitted Pending eCoaching Logs | Submitter Name = current user  Role = Support Staff  Status = Pending Acknowledgment, Pending Employee Review, Pending Supervisor Review and Pending Manager Review | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |
| 7 | My Submitted Completed eCoaching Logs | Submitter Name = current user  Role = Support Staff  Status = Completed | FormID (w/Link to form)  Employee Name  Supervisor Name  Manager Name  Status  Coaching Reason  Sub-coaching Reason  Value  Created Date | Pagination = 20 records  Show items in descending order from Created Date  Sorting can be done by selecting any column heading which has a hyperlink. |

**3.2.4.1.8.1 Support Staff Dashboard Filters**

The Support Staff dashboard contains the following additional filters.

|  |  |  |
| --- | --- | --- |
| **#** | **Filter** | **Description** |
| 1 | **My Dashboard – My Team’s Pending eCoaching Logs** | |
| A | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Source | Includes a list of possible source values of coaching logs. |
| 2 | **My Dashboard – My Teams Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Source | Includes a list of possible source values of coaching logs. |
| D | Submitted | Will include coaching logs which were submitted or created between the entered start and date end range. |
| 3 | **My Dashboard – My Team’s Warning eCoaching Logs** | |
| A | State | Includes a list of possible state values of warning logs such as active or expired. |
| B | Submitted | Will include warning logs which were submitted or created between the entered start and end date range. |
| 4 | **My Submissions – My Submitted Pending eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| 5 | **My Submissions – My Submitted Completed eCoaching Logs** | |
| A | Manager | Includes the name of the manager of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| B | Supervisor | Includes the name of the supervisor of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |
| C | Employee | Includes the name of employees who have received a coaching log. Is limited to those in the user’s hierarchy except on the Historical Dashboard. |

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

**3.2.4.1.9.1 Historical Reporting Dashboard Filters**

This Historical dashboard contains the following additional filters.

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

**3.2.4.1.9.2 Extract data from Historical Dashboard**

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

### 3.2.5 eCoaching Log Review

#### **3.2.5.1 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.

**3.2.5.1.1 All Reviewers**

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

**3.2.5.1.1.1 Informational Display**

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

**3.2.5.1.1.1.1 Coaching and Warning Logs**

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

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

**3.2.5.1.1.1.2 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.

**3.2.5.1.1.1.3 Examples**

Examples of information display:



**3.2.5.1.1.2 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 |

**3.2.5.1.1.3 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. |

**3.2.5.1.1.3.1 Examples**

Example display of coaching/warning reasons.



**3.2.5.1.1.4 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 |

**3.2.5.1.2 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 |

**3.2.5.1.3 Employee of Log**

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

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If log is not confirmed as a Customer Service Escalation 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 |

**3.2.5.1.3.1 Acknowledgement**

When the log source is IQS, LimeSurvey, Verint-GDIT, Verint-GDIT Supervisor, or Verint-TQC, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | 1. Check the box below to acknowledge the monitor: | Display text |
| 2 |  | Check box data entry |
| 3 | I have read and understand all the information provided on this eCoaching Log. | Display text |
| 4 | Submit | Button to save information |
| 5 |  | Status becomes Completed when Supervisor has acknowledged  Status becomes Pending Supervisor Review when Supervisor has not acknowledged |

**3.2.5.1.3.2 Acknowledgement and feedback**

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

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | 1. Check the box below to acknowledge the coaching opportunity: | Display text |
| 2 |  | Check box data entry |
| 3 | I have read and understand all the information provided on this eCoaching Log. | Display text |
| 4 | 2. Provide any comments or feedback below: | Display text |
| 5 |  | Text data entry |
| 6 | (max length 3,000 chars)  Provide as much detail as possible | Display text |
| 7 | Submit | Button to save information |
| 8 |  | Status becomes Completed |

**3.2.5.1.4 Supervisor of Record**

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

**3.2.5.1.4.1 Acknowledgement**

When the log source is IQS, LimeSurvey, Verint-GDIT, Verint-GIDT Supervisor, or Verint-TQC, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | 1. Check the box below to acknowledge the monitor: | Display text |
| 2 |  | Check box data entry |
| 3 | I have read and understand all the information provided on this eCoaching Log. | Display text |
| 4 | Submit | Button to save information |
| 5 |  | Status becomes Completed if Employee has acknowledged  Status becomes Pending Employee Review if Employee has not acknowledged |

**3.2.5.1.4.2 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, 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, IAT |
| 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 Employee Review if Yes selected for coaching required |

**3.2.5.1.4.2.1 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).

**3.2.5.1.4.2.2 SOP Link for OMR IAE, 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).

**3.2.5.1.4.3 Supervisor Review**

When the log source is not IQS, LimeSurvey, Verint-GDIT, Verint-GDIT Supervisor, Verint-TQC, or ETS with reason Outstanding Action – Employee and status is Pending Supervisor review, then display the following:

|  |  |  |
| --- | --- | --- |
| **#** | **Field Label/Static Text** | **Condition/Value/Description** |
| 1 | Details of the behavior being coached: | Display description of the log |
| 2 | Notes from Manager: | If coaching is required or manager notes of the log exist then display text and manager notes of the log |
| 3 | Enter the date of coaching: | Display text |
| 4 |  | Date data entry |
| 5 | 2. Provide the details from the coaching session including action plans developed: | Display Text |
| 6 |  | Text data entry |
| 7 | (max length 3,000 chars)  Provide as much detail as possible | Display text |
| 8 | Submit | Button to save information |
| 9 |  | Status becomes Pending Employee Review |

**3.2.5.1.4.4 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 |

**3.2.5.1.5 Manager of Record**

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

**3.2.5.1.5.1 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) |
| 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 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 |

**3.2.5.1.5.1.1 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)

**3.2.5.1.5.1.2 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)

**3.2.5.1.5.2 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 |

**3.2.7.1.5.3 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 |

**3.2.5.1.6 Other Reviewers**

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

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

**3.2.5.1.7 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

#### **3.2.6.1 Employee Information**

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

**3.2.6.1.1 Employee Information**

A record will be kept for each employee.

**3.2.6.1.1.1 Employee Hierarchy**

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

**3.2.6.1.2 Employee Data Feed**

Employee information will populated from data feeds.

**3.2.6.1.2.1 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.

**3.2.6.1.2.1.1 File Location and Name**

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

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

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

**3.2.6.1.2.1.2 File Format and Layout**

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

**3.2.6.1.2.1.3 Load Schedule**

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

**3.2.6.1.2.2 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.

**3.2.6.1.2.2.1 File Location and Name**

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

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

**3.2.6.1.2.2.2 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.

**3.2.6.1.2.2.3 Load Schedule**

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

**3.2.6.1.2.3 Special Handling**

Values contained in the data files require special handling.

**3.2.6.1.2.3.1 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.

**3.2.6.1.2.3.2 Re-used LAN IDs**

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

**3.2.6.1.2.3.3 Employee IDs with spaces**

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

**3.2.6.1.3 Log Inactivation**

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

**3.2.6.1.3.1 Inactivate Coaching Logs**

**3.2.6.1.3.1.1 Employee Status**

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

**3.2.6.1.3.1.2 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.

**3.2.6.1.3.2 Inactivate Warning Logs**

**3.2.6.1.3.2.1 Employee Status**

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

**3.2.6.1.3.2.2 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

#### **3.2.7.1 Administration Functions**

Provide for administrative functions.

**3.2.7.1.1 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.

**3.2.7.1.1.1 Add Users**

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

**3.2.7.1.1.1.1 Role**

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

Historical Dashboard Exception (ECL)

Advanced Resolution Center (ARC)

Senior Manager (SRMGR)

**3.2.7.1.1.1.1.1 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.

**3.2.7.1.1.1.1.2 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 still have access to the “Review” page but only if the user is not the submitter.

**3.2.7.1.1.1.1.3 Senior Managers**

Users who are senior managers (designated with a role of SRMGR) will have access to coaching and warning logs for employees in their hierarchy structure on their main dashboard.

**3.2.7.1.1.1.2 User LAN ID**

Allow for entering the user’s network LAN ID.

**3.2.7.1.1.1.3 User Name**

Allow for entering the user’s name.

**3.2.7.1.1.2 Remove Users**

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

**3.2.7.1.2 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.

**3.2.7.1.2.1 Application**

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

**3.2.7.1.2.1.1 Permissions to Delete**

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

**3.2.7.1.2.1.2 Search for Log**

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

**3.2.7.1.2.1.3 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.

**3.2.71.2.1.4 Review Log**

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

**3.2.7.1.2.1.5 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.

**3.2.7.1.2.1.7 Backup**

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

**3.2.7.1.3 Inactivate Records**

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

**3.2.7.1.3.1 Manual Process**

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

**3.2.7.1.3.2 Automatic Process**

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

**3.2.7.1.3.2.1 File Location and Name**

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

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

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

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

**3.2.7.1.3.2.2 File Format and Layout**

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

Example: eCL-John.Doe-1002249

**3.2.7.1.3.2.3 Schedule**

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

**3.2.7.1.3.2.4 Results**

**3.2.7.1.3.2.4.1 Validation**

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

Unsuccessful processing reasons will be:

Form Name doesn’t exist

Invalid status for inactivation

**3.2.7.1.3.2.4.2 Notification**

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

FormName – from the input file

Message – whether successfully inactivated for validation error message

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

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

### 3.2.8 eCoaching Log Reporting

#### **3.2.8.1 Reporting**

**3.2.8.1.1 Historical Dashboard Extract**

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

**3.2.8.1.1.1 Filters**

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

**3.2.8.1.1.2 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

**3.2.8.1.1.3 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.

### 3.2.9 eCoaching CSR Survey

#### **3.2.9.1 eCoaching CSR Survey**

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

**3.2.9.1.1 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)

**3.2.9.1.1.1 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.

**3.2.9.1.1.2 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)

**3.2.9.1.2 Notification**

Employee will receive an email notification to complete the survey.

**3.2.9.1.2.1 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 |

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

**3.2.9.1.3 Survey Form**

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

**3.2.9.1.3.1 eCoaching Log Logo**

The survey form should display the eCoaching Log logo.

**3.2.9.1.3.2 Survey Text**

The opening text for the survey shall be:

The Quality team is asking for your help in providing feedback on your coaching experience with your supervisor. Please take a few minutes to complete this survey. The details from this survey will be used to improve the effectiveness, content and delivery of discussions regarding your performance.

**3.2.9.1.3.3 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.

**3.2.9.1.3.4 Survey Questions**

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

**3.2.9.1.3.4.1 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.

**3.2.9.1.3.4.2 Survey Questions**

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

**3.2.9.1.3.4.3 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.

**3.2.9.1.3.4.4 Maintenance**

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

**3.2.9.1.3.5 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.

**3.2.9.1.3.5.1 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.

**3.2.9.1.4 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

**3.2.9.1.5 Inactivation/Deletion**

Surveys may be inactivated or deleted.

**3.2.9.1.5.1 Five Day Inactivation**

Surveys which remain uncompleted 5 days after creation will be inactivated.

**3.2.9.1.5.2 Individual Inactivation**

Individual surveys will be inactivated whether completed or uncompleted when the corresponding eCoaching Log is inactivated.

**3.2.9.1.5.3 Employee Status**

Employee records which have Active status of T (termed) or D (deceased) in PeopleSoft will have their uncompleted surveys inactivated.

**3.2.9.1.5.4 Individual Deletions**

Individual surveys will be deleted whether completed or uncompleted when the corresponding eCoaching Log is deleted.

**3.2.9.1.6 Survey Recipients**

Recipients of eCoaching Log Surveys will be those employees in the CSR module.

## 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