**eCoaching Log System**

**Title: eCoaching Log Generation**

**Functional Requirements**

**Version 1.0**

|  |  |  |
| --- | --- | --- |
| Last Revision | Last Review | Description |
| 01/25/2021 |  | TFS19937 – eCL Log for Credit Card Policy |

Prepared by: R&T Date: 11/21/2014

Department, Location: CCO R&T – Oakdale

Approved by: Date:

|  | **Change History Log**  **Change Description** | **Author** |
| --- | --- | --- |
| 01/25/2021 | TFS19937 – eCL Log for Credit Card Policy  Initial version | Doug Stearns |

#### **1.0 Coaching Log Generation**

Generate eCoaching logs from information provided by the Program.

**1.0.1 Selection of logs**

Those who will receive the logs are all currently active CSRs and Quality Monitors.

**1.0.2 Schedule**

This will be a one-time process to create/submit the logs as requested.

**1.0.3 Module Information**

The module of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Employee level** |
| CRD | Customer Service Representative  Quality |

**1.0.4 Report Code**

The report code for generated eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Report Code** |
| CRD | CRD<CCYYMMDD> where CCYYMMDD represents the date the log is generated  e.g. 20210125 |

**1.0.5 Source**

The source of the coaching log shall be as follows:

|  |  |
| --- | --- |
| **Log Type** | **Source** |
| CRD | Training and Development |

**1.0.6 Delivery Option**

The Delivery Option shall be considered to be Indirect.

**1.0.7 Customer Service Escalation information**

The customer service escalation of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Customer Service Escalation** |
| CRD | Not Applicable |

**1.0.8 eCoaching Log Status**

The status of the eCoaching log will be as follows:

|  |  |
| --- | --- |
| **Log Type** | **Status** |
| CRD | Pending Employee Review |

**1.0.9 Coaching Reasons and Sub-Coaching Reasons**

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Log Type** | **Coaching Reason** | **Opportunity/Reinforcement** | **Coaching Sub-reason** |
| CRD | Current Coaching Initiative | Reinforcement | Other: Specify reason under coaching details. |

**1.0.10 Recipient of coaching log**

The recipient of the eCoaching Log shall be currently active CSRs and Quality Monitors.

**1.0.11 Site information**

The site of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Site** |
| CRD | From employee record |

**1.0.12 Program information**

The program of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Program** |
| CRD | From employee record |

**1.0.13 Reviewer information**

The reviewer of the eCoaching Log shall be determined as follows:

|  |  |
| --- | --- |
| **Log Type** | **Generated** |
| CRD | The employee recipient |

**1.0.14 Event Date**

The date of coaching or event of the eCoaching Log will be the current date.

**1.0.15 Start Date**

The start date of the eCoaching Log will be the current date.

**1.016 Submitted Date**

The submitted date of the eCoaching Log will be the system date at time the new log is generated.

**1.0.17 Submitter**

The submitter of the eCoaching Log shall be 999999.

**1.0.18 Email notification**

Email notifications for generated coaching logs will be sent as follows:

|  |  |
| --- | --- |
| **Log Type** | **Email** |
| CRD | Email notifications for generated coaching logs will be sent to the coaching log recipient. |

**1.0.19 Report Details**

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

|  |  |
| --- | --- |
| **Log Type** | **Report Details** |
| CRD | When assisting our beneficiaries and consumers, NEVER ask for credit card numbers. CSRs should not attempt to help beneficiaries and consumers with credit card payments (or payments of any kind) – you must follow scripts.  ALL calls are recorded. If you ask for credit card information, you will face disciplinary action, up to and including termination. If it is determined that credit card fraud has taken place, we will report it to the proper authorities.  The following activities could be grounds for disciplinary action up to and including termination:  1. Asking for credit card or bank information.  2. Attempting to process payments.  3. Asking for a caller's password.  Important Reminder! Medicare and Marketplace representatives should never ask the beneficiary or consumer for credit card or bank account information. We never collect payments of any kind. Refer to the Role of 1-800 Medicare CSR script (Medicare) and the Protecting Consumers' Information script (Marketplace) for more information.  If you have any questions, contact your supervisor, manager, or Human Resources representative. |