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**Title:** IQS **eCoaching Log File Layout**

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Prepared by: Kimmit Renken Date: 04/05/2012

Department, Location: R&T – Oakdale

Approved by: Date:

**Change History Log**

| **Date** | **Change Description** | **Author** |
| --- | --- | --- |
| 04/05/2012 | Initial revision | Kimmit Renken |
| 04/10/2012 | Clarified the record inclusion rules for the eCL feed. | Kimmit Renken |
| 04/12/2012 | Updated Summary of Callers Issues field size, modified description for Coaching Date, CSR Emp ID is required, added Evaluation Date per eCL team review. | Kimmit Renken |
| 04/20/2012 | Added 2 new fields: Coacher Emp ID and CSR Signature (SCR 7119) | Kimmit Renken |
| 05/14/2012 | Added requirement with a list of scorecard type included in the data file (SCR 7280) | Kimmit Renken |
| 05/16/2012 | Removed QWCM ISG and Webchat ISG from the scorecard type list (SCR 7280) | Kimmit Renken |
| 06/07/2012 | Changed the data file from comma delimited to pipe delimited. Also removed text stating there will be double quotes around text fields. (SCR 7365) | Kimmit Renken |
| 07/09/2012 | Updated required fields (SCR 7635) | Kimmit Renken |
| 08/02/2013 | Updated fields for changes made when shifting from Verint to IQS\Lime Survey as the source system (SCR 10313) | Brian Coughlin |
| 09/23/2013 | Updated Summary of Caller Issues to add in Coaching Notes and consequently blanked out Coaching Notes (SCR 11115) | Brian Coughlin |
| 01/08/2014 | Updated Journal File Number from 20 to 30 bytes | Brian Coughlin |
| 05/15/2014 | P12687 – IQS Verint to eCL feed  Added field 22 Program  Modified section 2 eCoaching Opportunity/Reinforcement Calculation | Doug Stearns |
| 07/10/2014 | P13054 – IQS/eCL Add Evaluation Form name to data feed  Added new field 23 | Doug Stearns |
| 07/15/2014 | P13054 – IQS/eCL Add Evaluation Form name to data feed  Modified field 23 for eMail and Written Corr | Doug Stearns |
| 10/29/2014 | P13701 – IQS/eCL IQA Scorecards  Added information for field 16 and 23 | Doug Stearns |
| 11/17/2014 | P13826 – IQS/eCL Source Values  Added information for field 19 | Doug Stearns |
| 02/12/2015 | P13276 – eCL Change BCC to CCO  Changed Vangent logo to GDIT | Doug Stearns |
| 02/13/2015 | P13276 – eCL Change BCC to CCO  Changed Vangent GDIT in footer | Doug Stearns |

# eCoaching Log Scorecard Data Files Requirements

1. **The eCoaching Log Data File will contain records from each channel (PPoM, QCM, QWCM, and WebChat).**
2. 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. **The eCoaching Log Scorecard Data File will contain active evaluations only.**
4. The eCoaching Log Scorecard Data File will **be encrypted.**
5. The eCoaching Log Scorecard Data File will **be sent on a daily basis.**
6. **Include the following Scorecard Types in the data file:**

* LimeSurvey
* Verint-GDIT
* Verint-TQC

Note: The Document Control Number will not be included in the file layout.

# eCoaching Log Opportunity/Reinforcement Calculation

The score for the eCoaching Log Opportunity/Reinforcement field will be expressed as a rating of the coached scorecards. The scorecards will be rated by evaluating the overall score for the scorecards.

For channels of Phone, PPOM, ARC, ISG and Web Chat, the Opportunity/Reinforcement field will receive a value of Met Goal, or Did not meet Goal based on the following rules:

* A Score Overall of 90% or greater will result in a score of **Met Goal** in the *Opportunity/Reinforcement* field.
* A Score Overall of less than 90% will result in a score of **Did not meet Goal** in the *Opportunity/Reinforcement* field.

For channels of Written Corr and eMail, the *Opportunity/Reinforcement* field will receive a value of **Reinforcement**, **Opportunity**, or **Opportunity-PWC** based on the following rules:

Scorecard overall section scores of **T-B-D**, **NA**, or **NA-NRN** will not be included in the calculation.

* All **Pass/Yes** overall scores in all sections of the scorecard will result in a score of **Reinforcement** in the *Opportunity/Reinforcement* field.
* If there are no **Fail/No** overall scores in any section of the scorecard, a **PWC/YWC** overall score in any section of the scorecard will result in a score of **Opportunity-PWC** in the *Opportunity/Reinforcement* field.
* A **Fail/No** score in any section of the scorecard will result in a score of **Opportunity** in the *Opportunity/Reinforcement* field.

# eCoaching Log Scorecard Data File

The following chart defines the Generic Call Monitoring Scorecard Data File Elements and layout format for the eCoaching Log scorecard data file. Each element will be pipe delimited. The file will have the following naming convention:

eCL\_IQS\_Scorecard\_YYYYMMDD.csv (<YYYYMMDD> represents the Year, Month and Day)

Scorecard records should only be present in the file if they are new or there is a change in the scorecard’s information. The scorecard 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.

| **Element #** | **Req** | **Field Name** | **Max Length / Field Format** | **Description** |
| --- | --- | --- | --- | --- |
|  | \* | Evaluation ID | 20 bytes, Alpha/Numeric | Evaluation ID is the unique indicator for the scorecard. This should be a natural key back to the source system. |
|  | \* | Evaluation Date | 19 bytes, (MM/DD/CCYY HH:MI:SS) | The date and time when the evaluation is created. This will be the system calculated date and local time of the site where the evaluation is first saved.  Cannot be future dated. |
|  | \* | Evaluation Site ID | 3 bytes, Numeric | The site where the scorecard is created. Valid site IDs are:  84 – Chester (Richmond)  33 – Coralville (Iowa City)  85 - Corbin  35 - Phoenix  278 – Tampa  32 - Lawrence  33 – Peckham  279 – London  280 – Bogalusa  281 – Hattiesburg  282 – Houston  283 – Las Cruces  284 – Lynn Haven  285 – Sandy  290 – Waco  291 – Winchester |
|  | \* | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the CSR |
|  | \* | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the CSR |
|  | \* | Supervisor Emp ID | 20 bytes, Alpha/Numeric | Supervisor’s Employee IDe CSR’s sentuator IDcard as an opportunity or reinforcement |
|  | \* | Supervisor Emp ID | 20 bytes, Alpha/Numeric | Supervisor’s Employee IDe CSR’s sentuator IDcard as an opportunity or reinforcement |
|  | \* | Manager Emp ID | 20 bytes, Alpha/Numeric | Manager’s Employee ID |
|  | \* | Manager Emp ID | 20 bytes, Alpha/Numeric | Manager’s Employee ID |
|  |  | Journal File Number | 30 bytes, Alpha/Numeric | An ID associated to the original voice and data recordings referring to the number assigned to the call. (Note this is not the Token)  Cannot be Null, Blank or NA for PPoM and QCM but can be blank otherwise. |
|  | \* | Call Date / Time | 19 bytes. (MM/DD/CCYY HH:MI:SS) | System generated date/time of the call for evaluations with valid call content. If there is no valid call content this field will be populated with the current date generated when the query is run. |
|  | \* | BLANK | 19 bytes. (MM/DD/CCYY HH:MI:SS) | Previously Coaching Date |
|  | \* | Summary of Caller's Issues  **PLUS**  Coaching/Goal Discussion | 6150 bytes, Alpha/Numeric Non-alphanumeric characters are removed. | Reason why the Beneficiary called.  This goes into Details of Behavior being Coached in the front end.  **PLUS**  Notes for coaching discussions with the CSR.  From “Summary of Coaching Priorities” comment field on the form.  NA will be populated in this field if not populated by the user.  An appealed record will be identified by an “A-“ appended at the beginning of any text in this field.  These 2 sections will be separated in the feed by:  **<Carriage Return>**  **COACHING NOTES** |
|  | \* | Blank | 4000 bytes, Alpha/Numeric Non-alphanumeric characters are removed. | Formerly Coaching/Goal Discussion:  Notes for coaching discussions with the CSR.  From “Summary of Coaching Priorities” comment field on the form.  NA will be populated in this field if not populated by the user.  An appealed record will be identified by an “A-“ appended at the beginning of any text in this field. |
|  |  | Customer Service Assessment Critical Error | 2 bytes, Alpha/Numeric | Critical Error code for Customer Service Assessment or Writing Skills Assessment.  Valid QCM values: 1, 2, 3, 4, 5, 6, 7, 8, or Blank (for NA).  Default value: Blank |
|  | \* | Evaluator ID | 20 bytes, Alpha/Numeric | The User ID of the person who created the evaluation.  For IQA Scorecards, this will be 999999 |
|  |  | Blank | 25 bytes, Alpha/Numeric | Formerly Coached by Name: name of the person performing the coaching |
|  | \* | Blank | 20 bytes, Alpha/Numeric | Formerly Coacher Emp ID:User ID of the person who performed the coaching.  Will cross match to confirm the ID exists in the Person table. |
|  | \* | Source | 30 bytes, Alpha/Numeric | The Source of the eCoaching log informaiton  Valid values:  Verint-GDIT  Verint-TQC  LimeSurvey |
|  | \* | Blank | 10 bytes, Alpha/Numeric | Formerly CSR Signature: Emp ID of the CSR being coached.  Will contain ‘XXXXX’ if the CSR has refused to sign.  Will cross match to confirm the ID exists in the Person table. |
|  | \* | Opportunity / Reinforcement | 17 bytes, Alpha/Numeric | Value calculated from the section overall scores within the scorecards.  Valid values:  Opportunity  Reinforcement  Opportunity-PWC  Met goal  Did not meet goal |
|  | \* | Program | 3 bytes, Alpha/Numeric | Identifies where the items is Marketplace or Medicare.  Values are:  Yes = Marketplace  No = Medicare |
|  |  | Evaluation Form | 50 bytes, Alpha/Numeric | For records from Verint = scorecard form used  For records from Lime Survey = channel  For IQA Scorecards, the letters IQA will be somewhere in the field |

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