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**eCoaching Log System**

**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 |
| 08/03/2015 | TFS413 – IQS/eCL new Verint-GDIT Supervisor source  1.6. Include the following Scorecard Types in the data file:  3 eCoaching Log Scorecard Data File - #19 Source | Doug Stearns |
| 08/05/2015 | TFS283 – IQS/eCL Scorecard feed changes  Cleaned up description of Blank fields, added sample from FS, added update notes to certain descriptions. | Doug Stearns |
| 01/26/2016 | TFS1075 – eCL Requirements Peer Review  Moved requirement information to FS | Doug Stearns |
| 10/28/2016 | TFS3757 – eCL Coaching Monitor  Added field 24 Coaching Monitor | Doug Stearns |
| 01/06/2017 | TFS5149 – eCL Requirement Document Cleanup  Formatted heading 1.1 and added additional information  Removed note cannot be null  Removed required column  Removed sample IQS feed  Changed size to n/a for blank fields | Doug Stearns |
| 08/04/2017 | TFS7541 – eCL ATA evaluations from IQS  Updated the following for ATA: 13, 21, 23 | Doug Stearns |
| 09/08/2017 | TFS7541 – eCL ATA evaluations from IQS  Added clarifying notes to the following for ATA: 4, 5, 13, 16 | Doug Stearns |
| 11/28/2017 | TFS9075 – IQS ATA for Subcon Calls to eCL  Updated 13 for format of ATA Summary of Caller’s Issues | Doug Stearns |
| 01/22/2018 | TFS9204 – eCL Inactivated Records from IQS  Added field 25 Active Status | Doug Stearns |
| 02/05/2019 | TFS13332 – eCL Quality Now  Added section 1.2 | Doug Stearns |
| 02/28/2019 | TFS13332 – eCL Quality Now  Updated from developers discussions | Doug Stearns |
| 08/13/2019 | TFS 15058 IQS QN Evaluations | Brian Coughlin |
| 09/17/2019 | TFS15450 - eCL Brownsville Integration  Updated 1.1 #3 Evaluation Site ID and 1.2 #4 Evaluation Site ID | Doug Stearns |
| 10/11/2019 | TFS1515782 – eCL Generic Feed FS Updates  Updated 1.1 #19 Source for QCM logs are Verint-GDIT, Verint-GDIT Supervisor | Doug Stearns |
| 07/28/2020 | TFS17716 – eCL Remove GDIT References  Updated throughout as needed  note: remaining references are for specific values related to coaching logs | Doug Stearns |

# eCoaching Log Scorecard Data Files Requirements

## 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 and may contain embedded carriage returns/line feeds. File does not contain column headings.

| **Element #** | **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 NDW site ID where the scorecard is created. Valid site IDs are:  84 – Chester (Richmond)  33 – Coralville (Iowa City)  35 – Phoenix  278 – Tampa  32 – Lawrence  279 – London  280 – Bogalusa  281 – Hattiesburg  284 – Lynn Haven  285 – Sandy  291 – Winchester  288 – Brownsville |
|  | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the Employee  (for ATA Scorecards this will be a quality monitor) |
|  | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the Employee  (for ATA Scorecards this will be a quality monitor) |
|  | 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 | n/a |  |
|  | Summary of Caller's Issues | 6150 bytes, Alpha/Numeric Non-alphanumeric characters are removed. | Text containing the questions, scores, evaluation, evaluator comments.  The general format for QCM and PPoM shall be:  Form Name – Channel – Contact Summary  COACHING COMMENTS:  *(if appealed record)* A –  each Question – Score – Value: Reason  evaluator's comments  The general format for ATA shall be:  Form Name – Channel – Contact Summary  *(if related QCM evaluation exists)*  COACHING COMMENTS:  *(if appealed record)* A –  each Question – Score – Value: Reason  evaluator's comments  *(if related PPoM evaluation exists)*  COACHING COMMENTS:  *(if appealed record)* A –  each Question – Score – Value: Reason  evaluator's comments  *(for related ATA evaluation)*  COACHING COMMENTS:  *(if appealed record)* A –  each Audit category – value  Auditor’s comments  Note: When IQS feeds are received, containing updated logs that are still Open in our system, this field will be updated to match the newest feed. |
|  | Blank | n/a |  |
|  | 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  For ATA Scorecards, this will be the alignment specialist |
|  | Blank | n/a |  |
|  | Blank | n/a |  |
|  | Source | 30 bytes, Alpha/Numeric | The Source of the eCoaching log informaiton  Valid values:  Verint-GDIT  Verint-GDIT Supervisor  Verint-TQC |
|  | Blank | n/a |  |
|  | Opportunity / Reinforcement | 17 bytes, Alpha/Numeric | Value calculated from the section overall scores within the scorecards.  Values:  Met goal  Did not meet goal  Note: When IQS feeds are received, containing updated logs that are still Open in our system, this field will be updated to match the newest feed. |
|  | 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 IQA Scorecards, the letters IQA will be somewhere in the field  For ATA Scorecards, the letters ATA will be somewhere in the field |
|  | Coaching Monitor | 3 bytes, Alpha/Numeric | Indicates where scorecard form was a coaching monitor or not  Values are:  Yes = Coaching Monitor  No = Not a coaching Monitor  NA = Not applicable |
|  | Active Status | 10 bytes, Alpha/Numeric | The active status of the record.  Values are:  Active  Inactive |

## The following chart defines the Quality Now Batch Call Monitoring Scorecard Data File Elements and layout format for the eCoaching Log scorecard data file. Each element will be pipe delimited and may contain embedded carriage returns/line feeds. File will contain column headings.

| **Element #** | **Field Name** | **Max Length / Field Format** | **Description** |
| --- | --- | --- | --- |
|  | QN Batch ID | 20 bytes, Alpha/Numeric | The Quality Now batch id assigned |
|  | QN Batch Status | 20 bytes, Alpha/Numeric | The status of the batch Values are:  Active Inactive |
|  | CSR Emp ID | 20 bytes, Alpha/Numeric | Employee ID for the Employee  (for ATA Scorecards this will be a quality monitor) |
|  | Evaluation Site ID | 3 bytes, Numeric | The NDW site ID where the CSR resides when the scorecard is created. Valid site IDs are:  84 – Chester (Richmond)  33 – Coralville (Iowa City)  35 – Phoenix  278 – Tampa  32 – Lawrence  279 – London  280 – Bogalusa  281 – Hattiesburg  284 – Lynn Haven  285 – Sandy  291 – Winchester  288 – Brownsville |
|  | Supervisor Emp ID | 20 bytes, Alpha/Numeric | Supervisor’s Employee ID |
|  | Manager Emp ID | 20 bytes, Alpha/Numeric | Manager’s Employee ID |
|  | Source | 30 bytes, Alpha/Numeric | The Source of the eCoaching log informaiton  Valid values:  Verint-CCO  Verint-CCO Supervisor |
|  | Strengths/Opportunities | 2000 bytes, Alpha/Numeric | The Contact Summary from the input file |
| For each evaluation record within a batch, the following will be present | | | |
|  | 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. |
|  | Evaluator ID | 20 bytes, Alpha/Numeric | The User ID of the person who created the evaluation.  For IQA Scorecards, this will be 999999  For ATA Scorecards, this will be the alignment specialist |
|  | 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. |
|  | 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.  Cannot be Null, Blank or NA for PPoM and QCM but can be blank otherwise. |
|  | Active Status | 10 bytes, Alpha/Numeric | The active status of the record.  Values are:  Active  Inactive Note: if the number of active evaluations in the batch is less than 3, the batch id shall be Inactive |
|  | Summary of Caller's Issues | 2400 bytes, Alpha/Numeric Non-alphanumeric characters are removed. | Text containing the information from the evaluation.  The general format for Quality Now shall be:  Channel – Reason for Contact  Reason for Contact Comments |
|  | 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 ATA Scorecards, the letters ATA will be somewhere in the field |
|  | Coaching Monitor | 3 bytes, Alpha/Numeric | Indicates where scorecard form was a coaching monitor or not  Values are:  Yes = Coaching Monitor  No = Not a coaching Monitor  NA = Not applicable |
|  | Business\_Process | 20 bytes, Alpha/Numeric | Rating on following established business process. Values are:  Complaint  Non-compliant |
|  | Business\_Process\_Reason | 200 bytes, Alpha/Numeric | Reason for non-compliance |
|  | Business\_Process\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Info\_Accuracy | 20 bytes, Alpha/Numeric | Rating on offering correct information to customers. Values are:  Complaint  Non-compliant |
|  | Info\_Accuracy\_Reason | 200 bytes, Alpha/Numeric | Reason for non-compliance |
|  | Info\_Accuracy\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Privacy\_Disclaimers | 20 bytes, Alpha/Numeric | Rating for abiding by all regulator requirements during each interaction. Values are:  Complaint  Non-compliant |
|  | Privacy\_Disclaimers\_Reason | 200 bytes, Alpha/Numeric | Reason for non-compliance |
|  | Privacy\_Disclaimers\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Issue\_Resoluton | 50 bytes, Alpha/Numeric | Rating for applying tools to provide complete information. Values are:  Novice  Emerging  Effective  Advanced  Expert  Customer Service Escalation |
|  | Issue\_Resoluton\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Call\_Efficiency | 50 bytes, Alpha/Numeric | Rating for controlling the call and handling the customer’s issues. Values are:  Novice  Emerging  Effective  Advanced  Expert  Customer Service Escalation |
|  | Call\_Efficiency\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Active\_Listening | 50 bytes, Alpha/Numeric | Rating for demonstrating an understanding of the customers needs. Values are:  Novice  Emerging  Effective  Advanced  Expert  Customer Service Escalation |
|  | Active\_Listening\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Personality\_Flexing | 50 bytes, Alpha/Numeric | Rating for being aware of our and our customers’ personalities and circumstance. Values are:  Novice  Emerging  Effective  Advanced  Expert  Customer Service Escalation |
|  | Personality\_Flexing\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Customer\_Temp\_Start\_Descriptor | 15 bytes Alpha/Numeric | Values are 1- Exuberant, 2 - Happy, 3 - Neutral, 4 - Frustrated, 5 - Furious |
|  | Customer\_Temp\_Start\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |
|  | Customer\_Temp\_End\_Descriptor | 15 bytes Alpha/Numeric | Values are 1- Exuberant, 2 - Happy, 3 - Neutral, 4 - Frustrated, 5 - Furious |
|  | Customer\_Temp\_End\_Comment | 2000 bytes, Alpha/Numeric | Comments entered by evaluator |