QPerform User Training Guide

Version: 1.0 **Last Updated:** December 9, 2025 **Application:** QPerform Performance Management System

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Introduction

What is QPerform?

QPerform is OnQ's performance management system designed to help supervisors, managers, and directors track agent performance, identify underperformers, and take appropriate corrective actions based on company policies.

Key Features

- **Real-time Performance Tracking** - View agent QA and Production scores
- **At-Risk Detection** - Automatic identification of agents at risk of termination
- **Smart Recommendations** - Automated suggestions for corrective actions (Cases A-E)
- **Warning Tracking** - Monitor verbal and written warnings with automatic expiration
- **Action Logging** - Document all corrective actions taken
- **Monthly Reports** - Comprehensive performance summaries

Getting Started

System Requirements

- **Browser:** Chrome, Edge, Firefox, or Safari (latest version)
- **Internet Connection:** Stable internet required
- **Account:** OnQ Microsoft 365 account
- **Permissions:** Access granted by IT/HR based on your role

Who Should Use QPerform?

- **Team Leads/Supervisors:** Monitor direct reports
- **Managers:** Oversee team performance
- **Directors:** Department-level analytics
- **AVPs:** Organization-wide visibility
- **HR Personnel:** Performance documentation and compliance

User Roles & Permissions

Role Overview

Role	View All Agents	Take Actions	View Reports	Access Level
AVP	✅ Yes	✅ Yes	✅ Yes	All clients/departments
Director	✅ Yes	✅ Yes	✅ Yes	All clients/departments
Manager	⚠️ Limited	✅ Yes	✅ Yes	Assigned clients only
Assistant Manager	⚠️ Limited	✅ Yes	✅ Yes	Assigned clients only
Supervisor	⚠️ Limited	✅ Yes	⚠️ Limited	Direct reports only
Team Lead	⚠️ Limited	✅ Yes	⚠️ Limited	Direct reports only
Agent	❌ No	❌ No	⚠️ Own data	Own performance only

Logging In

Step-by-Step Login Process

1. **Navigate to QPerform**
   - Open your web browser
   - Go to: `https://qperform.yourcompany.com`
2. **Welcome Screen**
   - You'll see the QPerform welcome screen with the OnQ logo
   - Click the **"Sign in with Microsoft"** button
3. **Microsoft Authentication**
   - You'll be redirected to Microsoft's login page
   - Enter your OnQ email address (e.g., `john.smith@onqfinancial.com`)
   - Enter your password

- Complete any 2-factor authentication if required

4. **Access Verification**

    - QPerform will verify your access permissions
    - If authorized, you'll be redirected to the Performance Dashboard
    - If unauthorized, you'll see an "Access Denied" message

First-Time Login

If this is your first time logging in:

- Contact your IT administrator to ensure your account has been granted access
- Verify your role is correctly configured in the system
- Review this training guide before using the application

Dashboard Overview

Main Navigation

After logging in, you'll see the main navigation menu:

```
┌──────────────────────────────────────────────┐
│  [OnQ Logo]  QPerform    [Your Name ▾]      │
├──────────────────────────────────────────────┤
│  Underperforming  │  Summary  │  Action Log │
└──────────────────────────────────────────────┘
```

Three Main Sections:

1. **Underperforming** - Performance grid showing all agents and their weekly scores
2. **Summary** - Monthly performance summaries by client and category
3. **Action Log** - Complete history of all corrective actions taken

Header Information

The header shows:

- **OnQ Logo** - Click to return to welcome screen
- **Current View** - Which section you're viewing
- **Your Name** - Your logged-in account
- **Logout Button** - Click your name to access logout option

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Viewing Performance Data

The Performance Grid

The **Underperforming** view shows a grid with:

Vertical Axis (Rows): Agent names **Horizontal Axis (Columns):** Calendar weeks

Each cell shows the agent's performance score for that week.

Reading the Grid

```
┌────────────────┬──────────┬──────────┬──────────┬──────────┐
│ Agent          │ Week 1   │ Week 2   │ Week 3   │ Week 4   │
│                │ 12/1-7   │ 12/8-14  │ 12/15-21 │ 12/22-28 │
├────────────────┼──────────┼──────────┼──────────┼──────────┤
│ John Smith     │  98.5%   │  97.2%   │  99.1%   │  100%    │
│                │  [Green] │  [Orange]│  [Yellow]│  [Green] │
├────────────────┼──────────┼──────────┼──────────┼──────────┤
│ Jane Doe       │  96.1%   │  95.8%   │  96.5%   │  97.5%   │
│   ⚠️ AT RISK   │  [Red]   │  [Red]   │  [Red]   │  [Orange]│
└────────────────┴──────────┴──────────┴──────────┴──────────┘
```

Agent Information Panel

On the left side of the grid, you'll see:

- **Agent Name** - Full name of the employee
- **Email Address** - Agent's email
- **At-Risk Badge** - If the agent is at risk of termination
- **Action Buttons** - "View Actions" and "Take Action"

Understanding Performance Scores

5-Level Color Coding System

QPerform uses a color-coded badge system to quickly identify performance levels:

For QA Metrics:

Color	Level	Score Range	Meaning
🟢 **Green**	Great	≥ 100%	Exceeding expectations
🟢 **Light Green**	Good	99-100%	Meeting expectations well
🟡 **Yellow**	Normal	98-99%	Meeting minimum standards
🟠 **Orange**	Low	97-98%	Below standards - needs attention
🔴 **Red**	Critical	< 97%	Significantly below standards - action required

For Production Metrics:

Color	Level	Score Range	Meaning

Color	Level	Score Range	Meaning
🟢 **Green**	Great	> 101%	Exceeding expectations
🟢 **Light Green**	Good	100-101%	Meeting expectations well
🟡 **Yellow**	Normal	99-100%	Meeting minimum standards
🟠 **Orange**	Low	98-99%	Below standards - needs attention
🔴 **Red**	Critical	< 98%	Significantly below standards - action required

When to Take Action

⚠️ **Action Required:**

- Any **Red (Critical)** score - immediate attention needed
- Multiple **Orange (Low)** scores - coaching recommended
- Three or more underperforming weeks - formal action required

✅ **No Action Needed:**

- **Green** scores - acknowledge good performance
- **Yellow** scores - monitor but no action required yet

Identifying At-Risk Agents

At-Risk Badge

Agents at risk of termination will have a colored badge next to their name:

```
🚨 CRITICAL - Immediate Action Required
⚠️  HIGH - Urgent Attention Needed
⚠️  MEDIUM - Monitor Closely
ℹ️  LOW - Early Warning
```

Risk Levels Explained

🚨 CRITICAL (Red Badge)

What it means: Agent has 2 or more Written Warnings **What to do:** One more underperformance could lead to termination. Consult with HR immediately.

⚠️ HIGH (Orange Badge)

What it means: Agent has 3 or more consecutive underperforming weeks **What to do:** Issue appropriate warning per company policy. Consider coaching session.

⚠️ MEDIUM (Yellow Badge)

What it means:

- 3 total underperforming weeks in the month, OR
- 1 Written Warning active **What to do:** Monitor closely. Provide additional coaching and support.

ℹ LOW (Blue Badge)

What it means: Early warning signs of potential underperformance **What to do:** Have informal conversation. Offer support and resources.

Viewing At-Risk Details

Click on the at-risk badge to see:

- Specific reasons for at-risk status
- Number of underperforming weeks
- Active warnings
- Recommended actions

Taking Corrective Actions

When to Take Action

Follow OnQ's progressive discipline policy:

1. First underperformance: **Coaching**
2. Continued underperformance: **Verbal Warning**
3. After 2 Verbal Warnings: **Written Warning**
4. After 2 Written Warnings: **Final Warning / PIP / Termination**

Step-by-Step: Taking an Action

Step 1: Open the Action Dialog

1. Locate the agent in the performance grid
2. Click the **"Take Action"** button next to their name
3. The "Take Action" dialog will open

Step 2: Fill Out the Form

Required Fields:

1. **Employee**
    - Select the agent from the dropdown
    - Start typing to search
    - The agent you clicked will be pre-selected
2. **Action Date**

   - Date you're taking this action
   - Usually today's date
   - Click the calendar icon to select

3. **Action Type**

   - Choose from dropdown:
     - Coaching
     - Training
     - Counseling
     - Verbal Warning
     - Written Warning
     - Final Warning
     - PIP (Performance Improvement Plan)
     - Termination
     - Other

4. **Warning Category** (for warnings only)

   - Substandard Work - Production
   - Substandard Work - QA
   - Other

5. **Week Range**

   - Select the week this action applies to
   - Choose from recent weeks

6. **Notes/Description**

   - **Minimum 10 characters required**
   - Be specific and professional
   - Include:
     - What the issue was
     - What was discussed
     - What the agent needs to improve
     - Timeline for improvement

7. **Taken By**

   - Your name (the person issuing the action)

Step 3: Review Warning Status

The dialog shows the agent's current warning status:

```
Current Warning Status for QA:
- Verbal Warnings: 1 active
- Written Warnings: 0 active
- Next Recommended Action: Issue 2nd Verbal Warning + Coaching
```

⚠ **Warning Progression Rules:**

- You cannot skip warning levels
- First warning must be Verbal
- After 2 Verbal Warnings, must issue Written Warning
- The system will prevent invalid progressions

Step 4: Expiration Date (Auto-Calculated)

The expiration date is automatically calculated based on warning type:

- **Verbal Warning:** 90 days (3 months)
- **Written Warning:** 180 days (6 months)
- **Final Warning:** 365 days (12 months)
- **PIP:** 90 days (3 months)
- **Termination:** Permanent (no expiration)

You can view but not edit this field.

Step 5: Submit

1. Review all information for accuracy
2. Click **"Submit"** button
3. Wait for confirmation message
4. Action is now logged and visible in Action Log

Example: Issuing a Verbal Warning

Scenario: Jane Doe has had 3 consecutive underperforming weeks in QA.

Steps:

1. Click "Take Action" next to Jane Doe
2. Action Type: Select "Verbal Warning"
3. Warning Category: Select "Substandard Work - QA"
4. Week Range: Select "12/15/2025 - 12/21/2025" (most recent underperforming week)
5. Notes: Enter detailed description:

   ```
   Verbal warning issued for substandard QA performance. Jane has scored
   below 97% for three consecutive weeks (12/1, 12/8, 12/15). We discussed
   the importance of accuracy and attention to detail. Jane acknowledged
   the issues and committed to improvement. We will review progress weekly.
   If performance does not improve to 97% or above within 2 weeks, a second
   verbal warning will be issued.
   ```

6. Taken By: "Sarah Johnson"
7. Click Submit

Result:

- Verbal warning logged
- Expires in 90 days (3/15/2026)
- Agent now has 1 active Verbal Warning for QA
- Next underperformance will trigger recommendation for 2nd Verbal Warning

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Viewing Action Recommendations

What are Recommendations?

QPerform's Recommendation Engine analyzes each agent's performance history and suggests the appropriate action based on OnQ policy (Cases A-E).

Opening Recommendations

1. Click **"View Actions"** button next to an agent's name
2. The Recommendations Dialog opens

Understanding the Recommendation

The dialog shows:

```
┌─────────────────────────────────────────────┐
│  Action Recommendation for John Smith       │
├─────────────────────────────────────────────┤
│  Case: B                                    │
│  ⚠ CRITICAL: Immediate action required      │
│                                             │
│  Recommended Action:                        │
│  Issue Written Warning                      │
│                                             │
│  Priority: Level 2 (High)                   │
│                                             │
│  Notes:                                     │
│  Agent has 2 active Verbal Warnings and     │
│  continues to underperform. CRITICAL: Escalate │
│  to Written Warning immediately.            │
│                                             │
│  Performance Summary:                       │
│  - Compliant Weeks: 1 / 4                   │
│  - Actions Taken: 2                         │
│                                             │
│  [Close]  [Take Action]                     │
└─────────────────────────────────────────────┘
```

The Five Cases (A-E)

Case A: Agent with 1 Verbal Warning + New Underperformance

- **Recommendation:** Issue 2nd Verbal Warning + Coaching Session
- **Priority:** Medium
- **Critical:** No

Case B: Agent with 2 Verbal Warnings + New Underperformance

- **Recommendation:** Issue Written Warning
- **Priority:** High
- **Critical:** ⚠ YES

Case C: Agent with 2 Written Warnings + New Underperformance

- **Recommendation:** Prepare for Employee Termination
- **Priority:** Highest
- **Critical:** ⚠ YES
- **Note:** Consult with HR immediately

Case D: Agent Underperforming 2+ Weeks, No Leadership Action

- **Recommendation:** Director provides Leadership Behavior Report to AVP + Verbal Warning to Leader
- **Target:** Leadership accountability
- **Priority:** High
- **Critical:** ⚠ YES

Case E: Leader Fails Procedures 2nd Time

- **Recommendation:** Director provides 2nd Leadership Behavior Report + Written Warning to Leader
- **Target:** Leadership accountability
- **Priority:** Highest
- **Critical:** ⚠ YES

Acting on Recommendations

1. Review the recommended action
2. If you agree, click **"Take Action"** button
3. This opens the Take Action dialog with pre-filled information
4. Add your notes and submit

Action Log Management

Viewing the Action Log

1. Click **"Action Log"** tab in the main navigation
2. See all actions taken across all agents

Action Log Columns

Column	Description

Column	Description
Date	When the action was taken
Agent	Employee who received the action
Action Type	Type of action (Coaching, Verbal Warning, etc.)
Category	What the action was for (Production, QA, Other)
Week	Which week the action applies to
Taken By	Manager/Supervisor who issued the action
Status	Active or Expired
Expiration	When the warning expires (if applicable)

Filtering the Action Log

Use the filter options to:

- View actions by specific agent
- Filter by action type
- See only active warnings
- View actions from specific time period

Deleting Actions

⚠ **Caution:** Only delete actions if they were entered in error.

1. Click the trash icon next to the action
2. Confirm deletion
3. Action is permanently removed

Best Practice: Never delete legitimate actions. They are part of the employee's record.

Monthly Summary Reports

Accessing Monthly Summary

1. Click **"Summary"** tab in the main navigation
2. Select month and year from filters

Understanding the Summary

The summary shows:

Overall Performance:

- Total agents (AFTEs)
- Number of underperformers
- Average performance score

By Client:

- Performance broken down by each client
- Category breakdowns
- Trends over time

At-Risk Agents:

- List of all agents currently at risk
- Risk levels
- Recommended actions

Exporting Reports

(Feature coming soon)

- Export to Excel
- Export to PDF
- Schedule weekly email reports

Using Filters

Filter Types

Month/Year Filters:

- Select the time period to view
- Default: Current month

Client Filter:

- View specific client performance
- Available based on your access level

Category Filter:

- Filter by performance category
- E.g., "Data Entry", "Customer Service"

Task Filter:

- Filter by specific task type

Applying Filters

1. Click the **"Filters"** button (funnel icon)
2. Select your filter criteria
3. Click **"Apply"**
4. Grid updates to show filtered data

Resetting Filters

Click **"Reset Filters"** to return to default view (current month, all clients).

Switching Between Production & QA Metrics

The Metric Toggle

At the top of the performance grid, you'll see:

```
┌──────────────────────────────────┐
│  Production  │  QA  ← Toggle     │
└──────────────────────────────────┘
```

How to Switch

1. Click **"Production"** to view production metrics
2. Click **"QA"** to view QA metrics
3. The entire grid updates with the selected metric type

What Changes When You Toggle

- **Performance Scores:** Different KPI values
- **Color Coding:** Uses different thresholds (QA vs Production)
- **At-Risk Detection:** Calculated separately for each metric
- **Recommendations:** Based on the selected metric category

Best Practice

- Review **both** Production and QA metrics weekly
- Some agents may perform well in one but poorly in the other
- Take actions specific to the metric that's underperforming

Best Practices

For Supervisors and Team Leads

1. **Review Weekly**
   - Check performance every Monday for previous week
   - Address any red or orange scores immediately
2. **Document Everything**
   - Always log coaching sessions, even informal ones
   - Be specific in notes - include dates, times, what was discussed
3. **Be Consistent**
   - Apply policies fairly to all team members

- Don't skip warning levels

4. **Proactive Coaching**

    - Don't wait for 3 underperforming weeks
    - Coach after first underperformance

5. **Follow Recommendations**

    - The system's recommendations align with OnQ policy
    - If you deviate, document why

For Managers and Directors

1. **Monitor Your Teams**

    - Review at-risk agents daily
    - Ensure supervisors are taking appropriate actions

2. **Leadership Accountability**

    - If a supervisor hasn't taken action on an underperformer, find out why
    - Cases D & E hold leaders accountable

3. **Review Action Log**

    - Audit action logs weekly
    - Ensure proper documentation

4. **Monthly Reports**

    - Review monthly summaries with your team
    - Identify trends and patterns

Documentation Guidelines

When writing notes for actions, include:

✅ **DO:**

- Be factual and specific
- Include dates and performance scores
- Note what was discussed and agreed upon
- Mention any support/resources offered
- Set clear expectations and timelines

❌ **DON'T:**

- Use emotional or judgmental language
- Include personal opinions
- Make assumptions about intent
- Write anything you wouldn't say to the employee's face

Example Good Note:

```
Verbal warning issued on 12/15/2025 for QA performance below 97% for
three consecutive weeks (12/1: 96.2%, 12/8: 95.8%, 12/15: 96.5%). Met
with agent to discuss accuracy issues in data entry. Agent acknowledged
awareness of the errors and committed to double-checking work before
submission. Provided refresher on QA standards document. Agent will
receive additional coaching on Tuesdays for the next 2 weeks. Performance
will be reviewed weekly. If performance does not improve to 97% or above
by 12/29/2025, a second verbal warning will be issued per policy.
```

FAQs

General Questions

Q: How often is performance data updated? A: Performance data is updated weekly, typically every Monday morning with the previous week's results.

Q: Can I see my own performance? A: Yes, agents can view their own performance data but cannot see other agents' data.

Q: What if I disagree with a performance score? A: Contact your supervisor to discuss. Performance scores come from the backend system and reflect actual work output.

Access & Permissions

Q: I can't see certain clients. Why? A: Access is role-based. Managers and below can only see their assigned clients. Contact your director if you need access to additional clients.

Q: Can I delete an action I took by mistake? A: Yes, you can delete actions through the Action Log. However, only delete actions that were entered in error, not legitimate actions.

Q: Who can see the actions I take? A: Actions are visible to:

- The person who took the action
- The agent's supervisors
- Managers, Directors, and AVPs with access to that client

Warnings & Expiration

Q: What happens when a warning expires? A: Expired warnings are no longer "active" and don't count toward the agent's warning progression. However, they remain in the action log for historical records.

Q: Can I extend a warning expiration date? A: No, expiration dates are set by company policy and cannot be manually changed. If new performance issues arise, issue a new warning.

Q: If an agent has an expired Verbal Warning and underperforms again, do I start over? A: Yes, expired warnings don't count. You would issue a new first Verbal Warning.

Recommendations

Q: Do I have to follow the system's recommendations? A: Recommendations are based on OnQ policy and best practices. While not mandatory, deviating from recommendations should be documented with a clear business reason.

Q: What if the recommendation seems too harsh? A: The recommendations follow progressive discipline policy. If you believe there are extenuating circumstances, consult with your manager or HR before taking action.

Q: Can I issue a Written Warning without 2 Verbal Warnings first? A: No, the system enforces proper warning progression. You cannot skip levels except in cases of gross misconduct (which should be handled through HR, not this system).

Technical Issues

Q: The page won't load. What do I do? A:

1. Refresh the page (F5 or Ctrl+R)
2. Clear your browser cache
3. Try a different browser
4. Contact IT support if the issue persists

Q: I can't log in. A:

1. Verify you're using your OnQ Microsoft account
2. Check that your account has been granted access to QPerform
3. Contact IT to verify your role is correctly configured

Q: Data looks wrong or outdated. A:

1. Check the selected month/year filters
2. Try refreshing the page
3. Verify you have the correct metric toggle selected (Production vs QA)
4. Contact your manager if data still appears incorrect

At-Risk Badges

Q: An agent has an at-risk badge but hasn't had 3 underperforming weeks. Why? A: At-risk status can be triggered by:

- 3 consecutive underperforming weeks, OR
- 3 total underperforming weeks in the month, OR
- Active written warnings Click the badge to see the specific reasons.

Q: How do I remove an at-risk badge? A: You don't manually remove badges. They update automatically based on:

- Agent's performance improving
- Warnings expiring
- Moving to a new month

Need Help?

Technical Support

- **Email:** support@qsoftware.cloud
- **Phone:** (555) 123-4567
- **Hours:** Monday-Friday, 8AM-5PM PST

Training & Questions

- **Manager:** Contact your direct supervisor
- **HR:** Contact HR department for policy questions
- **IT:** Contact IT for access and technical issues

Feedback

We welcome your feedback on QPerform!

- **Feature Requests:** Submit through the Help menu
- **Bug Reports:** Email support@qsoftware.cloud
- **Training Requests:** Contact your manager

Quick Reference Card

Color Codes

- 🔴 Red (Critical): < 97% QA or < 98% Production → Action Required
- 🟠 Orange (Low): 97-98% QA or 98-99% Production → Coaching Needed
- 🟡 Yellow (Normal): 98-99% QA or 99-100% Production → Meeting Standards
- 🟢 Light Green (Good): 99-100% QA or 100-101% Production → Above Standards
- 🟢 Green (Great): ≥ 100% QA or > 101% Production → Excellent

Warning Progression

1. Coaching (informal)
2. Verbal Warning #1 (expires in 90 days)
3. Verbal Warning #2 (expires in 90 days)
4. Written Warning (expires in 180 days)
5. Final Warning / PIP (expires in 365 days / 90 days)
6. Termination (permanent)

At-Risk Levels

- 🚨 **CRITICAL:** 2+ Written Warnings
- ⚠ **HIGH:** 3+ consecutive underperforming weeks
- ⚠ **MEDIUM:** 3 total weeks OR 1 Written Warning
- ℹ **LOW:** Early warning signs

Key Actions

- **View Actions:** See recommended actions for an agent
- **Take Action:** Log coaching, warnings, or other actions
- **Toggle Metric:** Switch between Production and QA views
- **Filter:** Narrow down data by month, client, category

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