

QPerform Troubleshooting Guide

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Common Issues

Quick Fixes That Solve 80% of Problems

Before diving into specific issues, try these quick fixes:

1. Refresh the Page

- Press **F5** or **Ctrl+R** (Windows) / **Cmd+R** (Mac)
- Hard refresh: **Ctrl+Shift+R** (Windows) / **Cmd+Shift+R** (Mac)

2. Clear Browser Cache

- Chrome: **Ctrl+Shift+Delete** → Select "Cached images and files" → Clear data
- Edge: **Ctrl+Shift+Delete** → Select "Cached data and files" → Clear
- Firefox: **Ctrl+Shift+Delete** → Select "Cache" → Clear Now

3. Check Internet Connection

- Verify you're connected to the internet
- Try accessing another website
- Check WiFi or ethernet connection

4. Log Out and Back In

- Click your name in the top right
- Select "Logout"
- Log back in with Microsoft SSO

5. Try a Different Browser

- If using Chrome, try Edge or Firefox
 - Helps identify browser-specific issues
-

Login & Authentication Issues

Issue: Cannot Access Login Page

Symptoms:

- Page doesn't load
- Blank white screen
- "Site can't be reached" error

Solutions:

1. Check the URL

- Verify you're using the correct URL
- Correct format: <https://qperform.yourcompany.com>
- Check for typos

2. Check Network Connection

- Are you on the corporate network or VPN?
- QPerform may require VPN access if working remotely

3. Check with IT

- Firewall may be blocking access
- Domain may not be whitelisted

Issue: Microsoft Login Fails

Symptoms:

- Error after entering Microsoft credentials
- "Authentication failed" message
- Redirects back to login page

Solutions:

1. Verify Account Type

- You must use your OnQ Microsoft 365 account
- Personal Microsoft accounts won't work
- Format: firstname.lastname@onqfinancial.com

2. Check Account Status

- Is your Microsoft account active?

- Try logging into Outlook or Teams to verify
- Contact IT if account is locked

3. Clear Browser Cookies

- Old authentication cookies may interfere
- Clear cookies for both [qperform.yourcompany.com](#) and [login.microsoftonline.com](#)

4. Disable Browser Extensions

- Ad blockers or privacy extensions may interfere
- Try logging in with browser in incognito/private mode

Issue: "Access Denied" After Login

Symptoms:

- Login succeeds but shows "Access Denied" page
- Message: "You do not have permission to access QPerform"

Solutions:

1. Verify Access Granted

- Your account must be granted access by IT/HR
- Contact your manager to request access

2. Check Role Assignment

- Your role must be configured in the system
- Contact IT to verify role assignment

3. Wait for Sync

- If you were just granted access, wait 10-15 minutes
- System may need time to sync permissions
- Log out and back in

Issue: Session Expires Too Quickly

Symptoms:

- Logged out after short period of inactivity
- "Session expired" message
- Must re-login frequently

Solutions:

1. This is Normal Behavior

- Access tokens expire after 1 hour of inactivity
- Security feature to protect data

2. Automatic Refresh

- System should auto-refresh tokens if page is active
- If not working, clear cache and cookies

3. Keep Tab Active

- If inactive for extended period, session will expire
- Refresh the page before it expires

Issue: Stuck on OAuth Callback Page

Symptoms:

- URL shows `/auth/callback` but page is blank
- Spinning loader that never completes
- No error message

Solutions:

1. Wait 30 Seconds

- Callback processing may take a moment
- Don't refresh immediately

2. Check URL for Error

- Look for `?error=` in the URL
- Note the error message and contact support

3. Clear Callback State

- Manually navigate to home page: <https://qperform.yourcompany.com>
- Try login process again

4. Check Browser Console

- Press `F12` to open developer tools
- Look for red error messages in Console tab
- Take screenshot and send to support

Performance Data Issues

Issue: Performance Grid is Empty

Symptoms:

- Grid shows no agents
- "No data available" message
- Blank white grid area

Solutions:

1. Check Filters

- Are month/year filters set correctly?
- Try selecting current month and year
- Click "Reset Filters" button

2. Check Access Level

- Do you have permission to view this data?
- Supervisors can only see their direct reports
- Managers can only see assigned clients

3. Verify Data Exists

- Is there actually data for the selected period?
- Try a different month that you know has data

4. Check Metric Toggle

- Are you on the correct metric (QA vs Production)?
- Try toggling to the other metric

Issue: Performance Scores Look Wrong

Symptoms:

- Scores don't match expected values
- All scores showing 0% or 100%
- Colors don't match scores

Solutions:

1. Verify Metric Type

- Make sure you're viewing the correct metric (QA vs Production)
- QA and Production have different scores

2. Check Week Range

- Verify you're looking at the correct week
- Week ranges are Sunday-Saturday

3. Confirm Data Source

- Performance data comes from backend system
- Contact backend team if data is incorrect at source

4. Check for Calculation Errors

- Refresh the page to recalculate
- Clear cache and reload

Issue: At-Risk Badges Not Showing

Symptoms:

- Agent should be at-risk but no badge appears
- Badge shows wrong risk level
- Badge appears but shouldn't

Solutions:**1. Verify Criteria**

- 3+ consecutive underperforming weeks, OR
- 3+ total underperforming weeks in month, OR
- 1+ Written Warnings active
- Check if agent actually meets criteria

2. Check Warning Category

- At-risk is calculated separately for Production vs QA
- Toggle to the correct metric

3. Verify Action Log Loaded

- At-risk detection requires action log data
- Refresh the page to reload action logs

4. Check Warning Expiration

- Expired warnings don't count
- Verify warning hasn't expired

Issue: Performance Data Not Updating**Symptoms:**

- Same data showing as last week
- New week doesn't appear
- Week columns not advancing

Solutions:**1. Check Update Schedule**

- Data updates weekly, typically Monday mornings
- Current week may not be available until it completes

2. Hard Refresh

- Press **Ctrl+Shift+R** to bypass cache
- This forces fresh data from server

3. Verify Backend Updates

- Contact backend team to confirm data pipeline is running

- Issue may be upstream in data processing

Issue: Missing Agents in Grid

Symptoms:

- Some agents don't appear
- Agent count doesn't match expected
- Specific agent cannot be found

Solutions:

1. Check Filters

- Client, category, or task filters may exclude agent
- Clear all filters and search again

2. Check Agent Status

- Agent may have left the company
- Agent may have transferred to different client/team
- Verify agent is still active in system

3. Check Access Permissions

- You may not have access to that agent's client
- Contact manager to verify access

4. Search by Email

- Use filter to search for specific agent email
 - Agent name may have changed but email hasn't
-

Action Logging Issues

Issue: Cannot Submit Action

Symptoms:

- Submit button is disabled
- Form shows validation errors
- Action doesn't save after clicking Submit

Solutions:

1. Check Required Fields

- All fields marked with * are required
- Employee, Date, Action Type, Week Range, Notes, Taken By
- Fill in all required fields

2. Check Notes Length

- Notes must be at least 10 characters
- Be more descriptive

3. Check Warning Progression

- You cannot skip warning levels
- Error message will tell you the issue
- Example: Can't issue Written Warning if no Verbal Warnings exist

4. Check Network Connection

- Action may be failing to send to server
- Check browser console for errors
- Verify internet connection

Issue: Warning Progression Validation Error

Symptoms:

- Error: "Cannot skip warning levels"
- Error: "First warning must be a Verbal Warning"
- Cannot issue desired warning type

Solutions:

1. Understand Progression Rules

First offense	→ Verbal Warning (required)
Second offense	→ Verbal Warning #2
Third offense	→ Written Warning
After 2 Written	→ Final Warning / PIP / Termination

2. Check Current Warning Status

- Look at "Current Warning Status" section in dialog
- See what warnings agent currently has active

3. Issue Correct Warning Type

- Follow the progression shown in recommendation
- Cannot jump from 1 Verbal to Written
- Must issue 2nd Verbal first

Issue: Expiration Date is Wrong

Symptoms:

- Expiration date doesn't match expected
- Date is in the past
- Date is too far in the future

Solutions:**1. Expiration is Auto-Calculated**

- You cannot manually edit expiration dates
- They are calculated based on warning type:
 - Verbal: 90 days
 - Written: 180 days
 - Final: 365 days
 - PIP: 90 days
 - Termination: No expiration

2. Check Action Date

- Expiration is calculated from Action Date
- If Action Date is wrong, expiration will be wrong
- Correct the Action Date

3. Verify System Date

- Check your computer's system date is correct
- Incorrect system date can cause calculation errors

Issue: Duplicate Action Error

Symptoms:

- Error: "Action already exists for this week"
- Cannot submit action
- Message about duplicate

Solutions:**1. Check Action Log**

- Go to Action Log tab
- Search for the agent
- Verify if action already exists for that week

2. Edit Existing Action

- Instead of creating new action, update the existing one
- Or delete the old one if it was entered in error

3. Use Different Week

- If action is for a different week, select correct week range
- System only allows one action per agent per week

Issue: Action Doesn't Appear in Action Log

Symptoms:

- Action submitted successfully
- Confirmation message shown
- But action not in Action Log

Solutions:**1. Refresh Action Log**

- Click Action Log tab again
- Press F5 to refresh page

2. Check Filters

- Action Log may be filtered
- Clear all filters to show all actions

3. Wait for Sync

- Give it 30 seconds to sync
- Refresh again

4. Verify Submission

- Did you actually see success message?
 - If error occurred, action wasn't saved
 - Try submitting again
-

Display & UI Issues

Issue: Layout Looks Broken

Symptoms:

- Elements overlapping
- Text cut off
- Buttons in wrong places
- Grid columns misaligned

Solutions:**1. Clear Browser Cache**

- Old CSS may be cached
- Hard refresh: **Ctrl+Shift+R**

2. Check Zoom Level

- Browser zoom should be 100%
- Press **Ctrl+0** to reset zoom
- QPerform is optimized for 100% zoom

3. Check Screen Resolution

- Minimum recommended: 1366x768
- Best experience: 1920x1080 or higher

4. Try Different Browser

- Chrome or Edge recommended
- Update browser to latest version

Issue: Performance Badges Show Wrong Colors

Symptoms:

- Score is 96% but showing yellow instead of red
- Colors don't match the score
- All badges are same color

Solutions:

1. Check Metric Type

- QA and Production have different color thresholds
- Verify you're on the correct metric toggle

2. Verify Thresholds

```
QA:
- Red: < 97%
- Orange: 97-98%
- Yellow: 98-99%
- Light Green: 99-100%
- Green: ≥ 100%

Production:
- Red: < 98%
- Orange: 98-99%
- Yellow: 99-100%
- Light Green: 100-101%
- Green: > 101%
```

3. Check Flag vs KPI

- Badge color is based on KPI score, not flag
- Flag is informational only

4. Clear Cache

- Cached color logic may be outdated
- Hard refresh

Issue: Dialogs Won't Open

Symptoms:

- Click "Take Action" but nothing happens
- Click "View Actions" but dialog doesn't appear
- No error message shown

Solutions:**1. Check for Pop-up Blocker**

- Browser may be blocking modal dialogs
- Disable pop-up blocker for QPerform domain
- Add site to allowed list

2. Check Browser Console

- Press F12
- Look for JavaScript errors in Console tab
- Take screenshot and report to support

3. Disable Browser Extensions

- Extensions may interfere with dialogs
- Try in incognito/private mode
- Disable extensions one by one to find culprit

4. Try Different Browser

- Issue may be browser-specific
- Chrome or Edge recommended

Issue: Text is Too Small/Large

Symptoms:

- Can't read text
- Text is blurry
- Font size inconsistent

Solutions:**1. Check Browser Zoom**

- Press **Ctrl+0** to reset to 100%
- QPerform is designed for 100% zoom

2. Check Operating System DPI Settings

- Windows: Display Settings → Scale should be 100%
- High DPI may cause rendering issues

3. Use Browser Zoom if Needed

- **Ctrl++** to zoom in
- **Ctrl+-** to zoom out
- Some layout issues may occur at non-100% zoom

Issue: Grid is Slow or Laggy

Symptoms:

- Scrolling is choppy
- Clicking cells has delay
- Grid takes long time to render

Solutions:

1. Close Unnecessary Browser Tabs

- Too many tabs consume memory
- Close tabs you're not using

2. Use Filters to Reduce Data

- Don't try to view all agents at once
- Filter by client or category
- View one month at a time

3. Check Computer Performance

- Open Task Manager (Ctrl+Shift+Esc)
- Check if CPU or memory is maxed out
- Close other applications

4. Use a Faster Browser

- Chrome and Edge generally faster than Firefox
- Keep browser updated

Filter & Search Issues

Issue: Filters Not Working

Symptoms:

- Select filter but data doesn't change
- "Apply" button doesn't do anything
- Filters reset after refresh

Solutions:

1. Click "Apply" Button

- Filters don't auto-apply
- You must click "Apply" after selecting

2. Check Filter Combinations

- Some combinations may have no data
- Example: Client A + Category X may not exist
- Try broader filters

3. Reset Filters

- Click "Reset Filters"
- Start fresh with new filter selection

4. Refresh Page

- Filters may be stuck
- Hard refresh: Ctrl+Shift+R

Issue: Can't Select Certain Filter Options

Symptoms:

- Dropdown options are grayed out
- Some months/clients not available
- Filter list is empty

Solutions:

1. Check Cascading Filters

- Filters cascade based on available data
- If you select Client A, only categories for Client A will show
- Clear other filters to see more options

2. Check Access Permissions

- You may not have access to certain clients
- Only your accessible clients will appear

3. Verify Data Exists

- No data for that filter combination
- Backend may not have data for that period

Issue: Search Not Finding Agent

Symptoms:

- Type agent name in search but no results
- Agent should exist but doesn't appear
- Search returns 0 results

Solutions:

1. Check Spelling

- Verify agent name is spelled correctly
- Try first name, last name, or email

2. Use Email Search

- Search by email is more reliable
- Format: `firstname.lastname@domain.com`

3. Check Filters

- Active filters may exclude the agent
- Reset all filters and try again

4. Verify Agent Exists in Current Period

- Agent may not have data for selected month
- Agent may have started/left during that period

Permission & Access Issues

Issue: Can't See Certain Clients

Symptoms:

- Client filter doesn't show expected clients
- Other users can see clients you can't
- "No data" for a client you should access

Solutions:

1. Check Your Role

- Supervisors and Team Leads: Only direct reports
- Managers: Only assigned clients
- Directors and AVPs: All clients
- Contact manager to verify role

2. Request Access

- If you need access to additional clients
- Contact your manager or IT
- Provide business justification

3. Verify Role Assignment

- Your role may not be correctly configured
- Contact IT to check role in system

Issue: Can't Take Actions

Symptoms:

- "Take Action" button is missing
- Button is disabled/grayed out
- Error when trying to submit action

Solutions:**1. Check Permission Level**

- Only certain roles can take actions:
 - Team Leads: Yes
 - Supervisors: Yes
 - Managers: Yes
 - Directors: Yes
 - AVPs: Yes
 - Agents: No

2. Verify Account Setup

- Contact IT to verify your permissions
- May need role updated in system

3. Check if Agent is in Your Scope

- You can only take actions on agents you have access to
- Can't take actions on agents from clients you don't manage

Issue: Can't Delete Actions**Symptoms:**

- Delete button missing
- Delete button disabled
- Error when trying to delete

Solutions:**1. Check Permissions**

- You can only delete actions you created
- Or actions for agents in your scope
- Directors/AVPs can delete more broadly

2. Check Action Status

- Some actions may be locked
- System actions can't be deleted

3. Contact Support

- If you need to delete someone else's action
- Provide business justification
- May require director approval

Network & Connectivity Issues

Issue: Page Loads Very Slowly

Symptoms:

- Page takes minutes to load
- Spinner keeps spinning
- Parts of page don't load

Solutions:

1. Check Internet Speed

- Run speed test: speedtest.net
- Minimum recommended: 10 Mbps download
- If slow, contact your ISP or IT

2. Check VPN Connection

- If using VPN, try disconnecting and reconnecting
- VPN may be slow or unstable
- Try different VPN server

3. Check Network Congestion

- Many users on same network?
- Peak hours may be slower
- Try accessing during off-peak hours

4. Disable Browser Extensions

- Extensions can slow down page load
- Try incognito/private mode

Issue: "Network Error" Message

Symptoms:

- Error: "Network Error"
- Error: "Failed to fetch"
- Error: "ERR_CONNECTION_REFUSED"

Solutions:

1. Check Internet Connection

- Are you connected to internet?
- Try accessing another website
- Restart router/modem if needed

2. Check Firewall

- Corporate firewall may block connection
- Contact IT to whitelist QPerform domain
- May need firewall exception

3. Check VPN

- Are you required to use VPN?
- Connect to VPN and try again
- Or disconnect VPN if not required

4. Check Backend Status

- Backend API may be down
- Contact IT to verify backend is running
- Check status page if available

Issue: API Timeout Errors

Symptoms:

- Error: "Request timeout"
- Error: "504 Gateway Timeout"
- Operations fail after long wait

Solutions:

1. Wait and Retry

- Server may be experiencing high load
- Wait 1-2 minutes and try again

2. Reduce Data Load

- Use filters to request less data
- View one month at a time
- Don't request all clients/agents at once

3. Check with IT

- Backend may need performance tuning
- Database queries may be slow
- Report specific operation that times out

Issue: Changes Not Saving

Symptoms:

- Submit action but it doesn't save
- Data reverts after refresh
- "Save failed" error

Solutions:

1. Check Network Connection

- Connection may have dropped during save
- Verify you're still connected
- Try save operation again

2. Check for Errors

- Look for error message
- Check browser console (F12)
- Note exact error message

3. Verify Data Format

- Invalid data may cause save failure
- Check all required fields are filled
- Check date formats are correct

4. Try Again

- Temporary network glitch
- Wait 30 seconds and retry
- If persists, contact support

Browser-Specific Issues

Chrome Issues

Issue: Cookie errors

- Solution: Settings → Privacy → Clear browsing data → Cookies
- Ensure "Allow cookies" is enabled for QPerform domain

Issue: Auto-fill interfering

- Solution: Disable auto-fill for QPerform
- Settings → Autofill → Disable for specific fields

Issue: Extensions blocking features

- Solution: Disable extensions or use Incognito mode
- Common culprits: Ad blockers, privacy extensions

Edge Issues

Issue: Compatibility mode

- Solution: Ensure site is not in compatibility mode
- Edge → Settings → Default browser → Remove from compatibility list

Issue: Tracking prevention

- Solution: Reduce tracking prevention level
- Edge → Settings → Privacy → Tracking prevention → Balanced

Firefox Issues

Issue: Enhanced tracking protection

- Solution: Disable for QPerform domain
- Shield icon in address bar → Turn off protection for this site

Issue: Cookie policies

- Solution: Allow third-party cookies for authentication
- Settings → Privacy → Custom → Allow cookies

Safari Issues

Issue: Intelligent tracking prevention

- Solution: Disable for QPerform
- Safari → Preferences → Privacy → Uncheck "Prevent cross-site tracking"

Issue: Cookie blocking

- Solution: Allow cookies from QPerform and Microsoft
- Safari → Preferences → Privacy → Allow from websites I visit

Error Messages Reference

Authentication Errors

Error Message	Cause	Solution
"Authentication failed"	Invalid Microsoft credentials	Verify email and password are correct
"Access token expired"	Session timeout	Log out and log back in
"Unauthorized"	No access granted	Contact IT to request access
"Invalid redirect"	OAuth configuration error	Contact support
"CORS error"	Cross-origin policy issue	Contact IT - backend configuration needed

Data Loading Errors

Error Message	Cause	Solution
"Failed to load performance data"	API error or no data	Check filters, verify backend is running
"No data available"	No records for selected filters	Try different month/client/category

Error Message	Cause	Solution
"Failed to load filters"	Backend API down	Contact IT
"Network error"	Internet connection issue	Check network connection

Action Logging Errors

Error Message	Cause	Solution
"Cannot skip warning levels"	Invalid warning progression	Issue correct warning type per progression
"First warning must be Verbal"	Trying to issue Written first	Issue Verbal Warning first
"Required field missing"	Form validation error	Fill in all required fields
"Notes must be at least 10 characters"	Notes too short	Write more detailed notes
"Duplicate action exists"	Action already logged for this week	Check Action Log, use different week
"Failed to create action"	Server error	Retry, contact support if persists

Permission Errors

Error Message	Cause	Solution
"Access denied"	No permission for this operation	Verify your role with IT
"Insufficient permissions"	Role doesn't allow this action	Contact manager
"Not authorized to view this data"	Client access not granted	Request access from manager

Advanced Troubleshooting

Checking Browser Console for Errors

1. Open Developer Tools
- Press **F12** or right-click → "Inspect"
2. Click "Console" tab
3. Look for red error messages
4. Common error types:
- **401 Unauthorized:** Authentication issue

◦ **403 Forbidden:** Permission issue

◦ **404 Not Found:** Backend endpoint missing

◦ **500 Internal Server Error:** Backend crash

- **CORS error:** Cross-origin policy issue

5. Take screenshot of errors and send to support

Checking Network Tab

1. Open Developer Tools (F12)
2. Click "Network" tab
3. Refresh the page
4. Look for failed requests (red text)
5. Click failed request to see details:
 - Request URL
 - Status code
 - Response message
6. Send details to support

Checking Local Storage

1. Open Developer Tools (F12)
2. Click "Application" tab (Chrome) or "Storage" tab (Firefox)
3. Expand "Local Storage"
4. Click your QPerform domain
5. Check for:
 - `qsoftware_token` - Should exist if logged in
 - `qsoftware_user` - Should contain your user info
 - `qsoftware_refresh_token` - Should exist
6. If missing, log out and back in

Clearing Site Data Completely

Chrome:

1. F12 → Application → Clear storage
2. Check all boxes
3. Click "Clear site data"
4. Refresh page

Firefox:

1. F12 → Storage → Right-click domain
2. "Delete All"
3. Refresh page

Edge:

1. Same as Chrome

Testing in Incognito/Private Mode

1. Open incognito window
 - Chrome/Edge: **Ctrl+Shift+N**
 - Firefox: **Ctrl+Shift+P**
 2. Navigate to QPerform
 3. Log in
 4. Test the issue
 5. If works in incognito:
 - Problem is browser cache, cookies, or extension
 - Clear cache/cookies in normal mode
 - Disable extensions
-

When to Contact Support**Contact IT Support For:**

- Cannot log in after multiple attempts
- "Access Denied" even though you should have access
- Page won't load at all
- Backend errors (500, 502, 503, 504)
- Need access to additional clients
- Need role changed
- Suspected system outage

Contact Your Manager For:

- Questions about warning policies
- When to escalate actions
- Clarification on recommendations
- Access to specific clients/teams
- Policy exceptions

Contact HR For:

- Questions about progressive discipline
- Termination procedures
- Legal compliance questions
- Employee relations issues

Contact Development Team For:

- Bug reports
- Feature requests
- Data calculation errors
- Recommendation engine issues
- Performance optimization

Information to Provide When Reporting Issues

Include all of the following:

1. Your Information

- Name
- Email
- Role in organization

2. Issue Description

- What you were trying to do
- What you expected to happen
- What actually happened

3. Steps to Reproduce

- Exact steps to recreate the issue
- Be specific (e.g., "Clicked Take Action on Jane Doe for Week 12/15-12/21")

4. Error Messages

- Exact error message text
- Screenshot if possible

5. Environment

- Browser and version
- Operating system
- Network (VPN, corporate network, home)

6. When Did It Start?

- First time or recurring?
- Did it work before?
- What changed?

Support Contact Information

IT Help Desk

- **Email:** support@qsoftware.cloud

- **Phone:** (555) 123-4567
- **Hours:** Monday-Friday, 8AM-5PM PST
- **Emergency:** (555) 123-4568 (24/7)

QPerform Support

- **Email:** qperform-support@qsoftware.cloud
- **Slack:** #qperform-support
- **Documentation:** <https://docs.qperform.com>

System Status

- **Status Page:** <https://status.qsoftware.cloud>
- Check for known outages or maintenance

Quick Troubleshooting Checklist

Before contacting support, try these steps:

- ☐ Refresh the page (F5)
- ☐ Hard refresh (Ctrl+Shift+R)
- ☐ Clear browser cache and cookies
- ☐ Log out and back in
- ☐ Try a different browser
- ☐ Check internet connection
- ☐ Verify you're on VPN (if required)
- ☐ Check browser console for errors (F12)
- ☐ Try in incognito/private mode
- ☐ Disable browser extensions
- ☐ Restart browser
- ☐ Restart computer

If none of these work, contact support with detailed information about the issue.

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