

iGROW COACHING FORM

Full Name: Wilmar Diaz	Date: March 1, 2021
Employee No.: 1501	Immediate Supervisor: Joan Mamac

Issue / Goal - What is the issue and goal of the coaching session?

- No actual date added on the order and on some orders actual date was changed when he's supposed to not to change it.

Reality / Options – Root Cause Analysis and Agent's Feedback

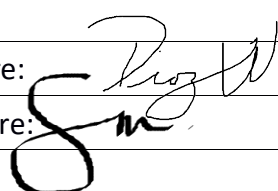
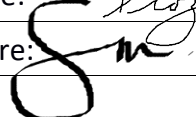
Spoke with the rep and he was newly transitioned to the new database he was working from 1BT before and is now working on OHH database so he said he was still adjusting and he admits that he was not minding the actual date because that's what he was used to on the other database.

Discussed to the rep when and when not to touch the actual dates to avoid these issues before.

Way Forward – Action Plan and Setting Proper Expectations

Advised rep to double check the order next time to make sure this will not result to any other errors in the future and to ask questions if something is confusing.

Further, same errors after this coaching rep will incur IR.

Employee Signature: 	Date: March 1, 2021
Supervisor Signature: 	Date: March 1, 2021

3601869 – no actual date added on the order

02/25/2021 04:17:32 PM	Diaz, Wayne	Custom field 'PAR Ownership' changed from 'NY -Needs Auth' to 'R.NY-Wayne Diaz (Initial Auth)'.
02/25/2021 04:17:32 PM	Diaz, Wayne	Custom field 'PAR Action Taken' changed from '[No selection]' to 'PAR Logged'.
02/25/2021 04:17:32 PM	Diaz, Wayne	Custom field 'PAR Date Action Taken' changed from " to '2/25/2021'.
02/25/2021 04:17:31 PM	Diaz, Wayne	WIP State changed from 'PAR INITIAL IN PROCESS' to '*7 Autoconfirm Review'.
02/25/2021 04:17:31 PM	Diaz, Wayne	WIP Assigned To changed from 'Diaz, Wayne' to 'BillingEdit, BillingEdit'.
02/25/2021 10:42:29 AM	Diaz, Wayne	WIP State changed from 'NEED PRIOR AUTH' to 'PAR INITIAL IN PROCESS'.
02/25/2021 10:42:29 AM	Diaz, Wayne	WIP Assigned To changed from '[None]' to 'Diaz, Wayne'.

3590499 – actual date incorrectly changed
 *WIP Assigned to incorrectly changed

02/25/2021 04:31:13 PM	Diaz, Wayne	Custom field 'PAR Ownership' changed from '[No selection]' to 'R.NY-Wayne Diaz (
02/25/2021 04:31:12 PM	Diaz, Wayne	WIP State changed from 'PAR INITIAL IN PROCESS' to '*7 Autoconfirm Review'.
02/25/2021 04:31:12 PM	Diaz, Wayne	WIP Assigned To changed from 'Diaz, Wayne' to 'BillingEdit, BillingEdit'.
02/25/2021 04:30:45 PM	Diaz, Wayne	StopReason changed from [None] to [04-PAR Expired]
02/25/2021 04:30:45 PM	Diaz, Wayne	[E0630] DOS changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:44 PM	Diaz, Wayne	[E0301] DOS changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:44 PM	Diaz, Wayne	[E0277] DOS changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:43 PM	Diaz, Wayne	[SLING STD CANVAS] DOS changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:43 PM	Diaz, Wayne	[BED-MATTRESS-BARI-42] DOS changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:42 PM	Diaz, Wayne	[BED-RAILS-HALF-B] DOS changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:41 PM	Diaz, Wayne	Actual Delivery Date changed from '2/20/2021' to '2/16/2021'.
02/25/2021 04:30:41 PM	Diaz, Wayne	Stop Date changed from '[None]' to '4/1/2027'.
02/25/2021 10:42:44 AM	Diaz, Wayne	WIP State changed from 'NEED PRIOR AUTH' to 'PAR INITIAL IN PROCESS'.
02/25/2021 10:42:44 AM	Diaz, Wayne	WIP Assigned To changed from '[None]' to 'Diaz, Wayne'.