Quality Evaluation Form

Quality Evaluation Form

Quality Evaluation Forms can be prepared to allow managers the ability to assess past calls of

agents. Evaluation forms can be formed as text, paragraph, option button, checkbox, list, and

scale. Forms can be used or displayed by a supervisor or those with access.

Creating a Quality Evaluation Form

1. Click the Plus button, [+], in the top right-hand corner of the Quality Evaluation

   Form screen, the following screen will appear:

2. In the top left corner, click the "Form Name" input box, and type the name of the new

   Quality Evaluation Form, an example is shown below:

3. There are three views for question answers, click one of the following as described in

   the list below:

 The question will be displayed in the checkbox format.

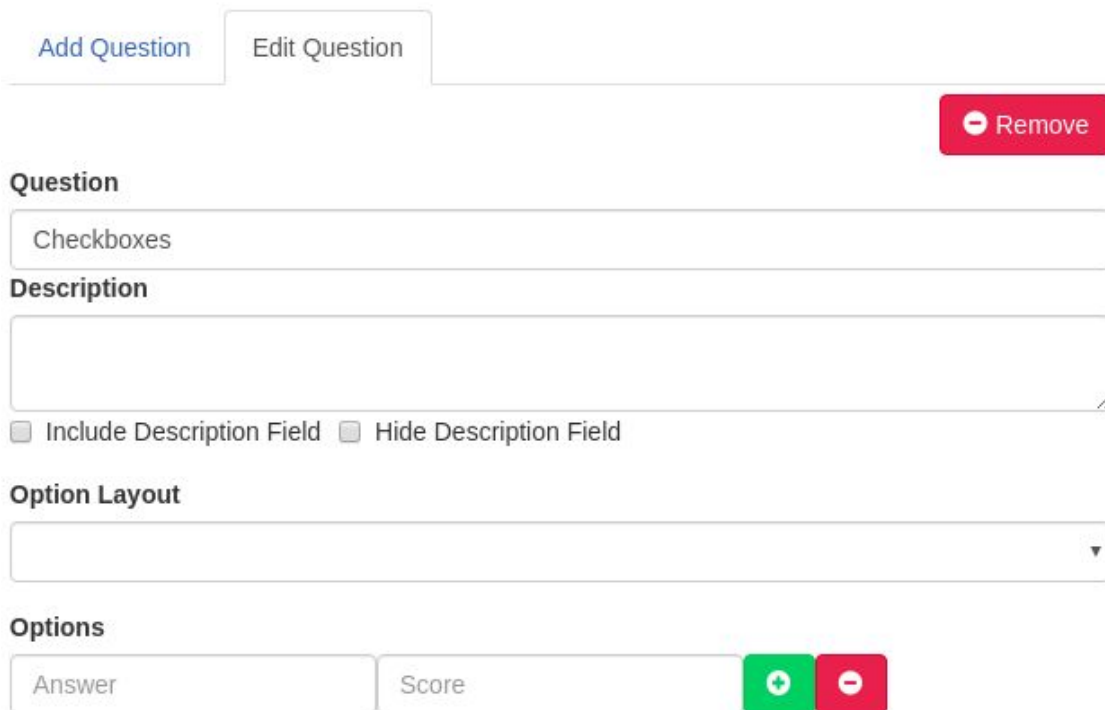 *The question will be displayed in the radio button format.*

 The question will be displayed in a dropdown format.

4. For this example, the "Checkboxes" selection was clicked; the following will appear on the screen, as shown below:
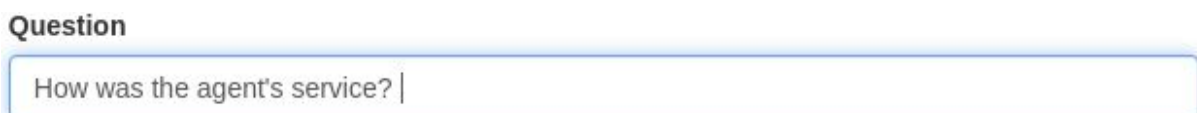

5. Customize the question, double-click the question desired to edit, the following screen will appear on the right of the screen as shown below:

6. Click the "Question" input box, type the name of the question. An example is shown below:

7. Click the "Description" input box; there are two selection boxes:

☐ Include Description Field

Check this box so that the evaluator can view the description.

☐ Hide Description Field

Check this box, used not to include the description (the evaluator will not be able to view the description if this box is checked)

For this example, the description will be included (Notice "Include Description Field" was clicked) as seen below:

Description

Evaluate the Agent's Score: Good = 10 Bad = 0

☑ Include Description Field ☐ Hide Description Field

8. Click the "Option Layout," a dropdown menu will appear showing two ways to view the answer options:
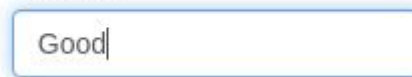
Option Layout

Vertical
Horizontal

9. Click the desired view; an example selection is shown below:

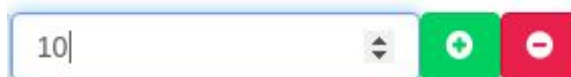**Option Layout**

| Vertical | ▾ |

10. Under Options, in the "Answer" input box, type one answer as seen below:

Options

| Good |

11. To the right of the "Answer" input box, click the "Score" input box and assign point-scale to the questions as seen below:

| 10 | ⬍ | ➕ | ➖ |

12. Add more answers as necessary by clicking the Plus button, ➕ , and then repeat steps 10 - 11 (this can be done as often as needed). Also, answers can be deleted by clicking the Minus button, ➖ .

13. Add additional questions to the form by selecting the "Add Question" button,

Add Question , and then repeat steps 3 - 12 as necessary.

Also, questions can be deleted by clicking the question, and then selecting the

"Remove" button, ➖ Remove .

14. After completing the form click the save button, **H Save** , the following confirmation will be displayed in the top right-hand corner of the screen as shown below:

15. After saving the form, click the "Back" button, **Back** , the created form can now be seen from the Form Name list as shown below:

Deleting a Quality Evaluation Form

1. Select the checkbox to the left of the Form name, as shown below:
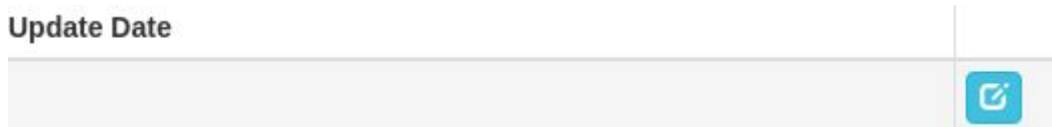

2. Press the Delete button, , located in the top right corner of the form name list screen as shown below:

Note: after clicking the Delete button, the form will be deleted forever, no confirmation screen will be displayed.
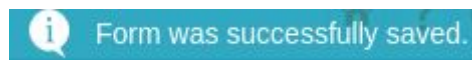
Editing a Quality Evaluation Form

1. Select the Edit button, , located to the right of the update column as shown below:

After clicking the edit button, the following screen will appear:

2. Make edits as necessary (Refer to the **Creating a Quality Evaluation Form** section for assistance)

3. After editing the form, click the save button, , the following confirmation will be displayed in the top right-hand corner of the screen, as shown below:

4. After saving the form, click the "Back" button, , the newly edited form can now be seen from the Form Name list as shown below:
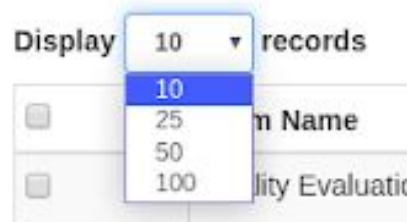
_____

Searching for a Quality Evaluation Form

There are two ways to search for a Quality Evaluation Form, as explained below:

Manually

1. Click the "Display records" dropdown box the following will be displayed:

Note: up to 100 forms can be displayed on a single screen. If more than 100 are present,

simply use the Previous button, Previous *, and/or Next button,* Next *. These buttons are*

located in the middle at the bottom of the Form Name list.

Key Word Search

1. Click the "Search:" input box, type part of the form name, insert date, or update date to filter the form list.