

Evaluation form

Section	Description
Module Context	Part of Quality Management within Genesys Cloud WEM
Navigation	Admin → Quality → Evaluation Forms
Alt Navigation	Menu → Conversational Intelligence → Quality Management → Evaluation Forms
Required Permissions	Quality > Evaluation Form > Add / Edit / Delete
Primary Function	Create and manage forms used by evaluators to score recorded interactions and measure agent performance and compliance

The Evaluation Forms page is a **dashboard for form management activities**. It lists all evaluation forms with the form name and the **date and time each form was last modified** — **this timestamp serves as the form's version ID**.

Study Notes

Topic	Explanation
Evaluation Form	A structured scoring template used to assess recorded interactions
Question Group	A logical grouping of related questions within a form (e.g., Compliance, Greeting, Product Knowledge)
Question Type	Defines how the evaluator responds to a question (Multiple Choice, Yes/No, Range)
Fatal Question	If answered incorrectly, the entire evaluation automatically fails regardless of total score
Critical Question	High-importance question that impacts score but does not cause automatic failure
Range Question	Evaluator scores on a numeric scale (e.g., 1-5)
Yes/No Question	Binary scoring — used for compliance checks
Multiple Choice Question	Evaluator selects from predefined options, each worth a point value
Points	Numeric score value assigned per answer option

Topic	Explanation
Help Text	Tooltip shown to evaluator when hovering over a question — improves scoring consistency
Require Additional Comments	Forces evaluator to enter a comment for that question — used for coaching or compliance evidence
Conditional Question	Displays a question only when a prior condition is met — reduces form complexity
Publish	Makes the form available for use in evaluations and policies
Version ID	The last-modified timestamp on the form list page

Navigation

Task	Navigation
Open Evaluation Forms	Admin → Quality → Evaluation Forms
Alt Navigation	Menu → Conversational Intelligence → Quality Management → Evaluation Forms
Create a new form	Admin → Quality → Evaluation Forms → Create
Edit a form	Admin → Quality → Evaluation Forms → select form → Edit
Publish a form	Inside the form editor → Publish button

Evaluation Forms List Page

UI Field	Description
Form Name	Name of the evaluation form
Last Modified (Date/Time)	Timestamp of last modification — also serves as the version ID for the form
Create	Opens a new evaluation form
Search	Search for forms by name
Edit	Open form for editing
Delete	Remove the form

Critical Evaluation Fields

Field	Description	Implementation Purpose	Example Use
Question Group	Logical grouping of related questions	Organizes the form into sections	Compliance / Greeting / Product Knowledge
Question Type	How the evaluator answers the question	Determines scoring behavior	Multiple Choice / Yes-No / Range
Points	Numeric value per answer option	Used to calculate final score	Correct = 1, Incorrect = 0
Help Text	Tooltip shown when evaluator hovers over question	Guidance for consistent scoring	"Agent must verify customer identity before proceeding."
Require Additional Comments	Forces evaluator to enter comments	Ensures detailed feedback for coaching/compliance	Required for low-scoring answers
Conditional Question	Shows only if prior condition is met	Keeps form concise and context-aware	Show escalation question only if customer asked for supervisor

Fatal Question

Field	Description	Implementation Purpose	Example
Fatal Question	If answered incorrectly, the entire evaluation automatically fails regardless of total score	Used for critical compliance or legal requirements	"Did the agent verify customer identity?"

Fatal Question Behavior

Agent Interaction



Evaluator answers Fatal Question



Incorrect Answer Selected



Entire Evaluation Score = FAIL
(regardless of all other question scores)

When to Use Fatal Questions

Scenario	Reason
Compliance violations	Regulatory requirement — failure is not acceptable
Security verification failure	Customer identity not confirmed
Mandatory legal disclosures not followed	Legal or contractual obligation

“ **Best practice:** Use fatal questions sparingly — reserve them only for true compliance or legal requirements where failure is unacceptable.

Critical Question

Field	Description	Implementation Purpose	Example
Critical Question	High-importance question that significantly impacts the evaluation score but does not automatically fail the entire evaluation	Ensures high-impact scoring without automatic failure	"Did the agent provide correct product information?"

Critical Question Behavior

Agent Interaction

↓

Evaluator answers Critical Question

↓

Incorrect Answer

↓

Points Deducted from Score

(evaluation does NOT automatically fail)

When to Use Critical Questions

Scenario	Reason
Customer experience standards	Greeting quality, empathy
Product knowledge verification	Accuracy of information given
Process adherence	Correct workflow followed

Question Types

Range Question

Field	Description	Implementation Purpose	Example
Range Question	Evaluator scores on a numeric scale	Measures qualitative performance	1-5 rating scale

Example scale:

Score	Meaning
1	Poor
3	Acceptable
5	Excellent

Yes / No Question

Field	Description	Implementation Purpose	Example
Yes / No Question	Binary scoring	Compliance checks	"Did the agent greet the customer properly?"

Points example:

Answer	Points
Yes	1
No	0

Multiple Choice Question

Field	Description	Implementation Purpose	Example
Multiple Choice	Evaluator selects from predefined options	Structured scoring	Greeting quality rating

Example options:

Answer	Points
Excellent	5
Good	3
Poor	1

Form Structure Example

Evaluation Form: Customer Service Review

Section 1: Compliance

Fatal Question → Identity Verification (Yes/No)

Section 2: Customer Experience

Range Question → Professionalism (1-5)

Critical Question → Issue Resolution (Yes/No)

Section 3: Product Knowledge

Multiple Choice → Correct Information Provided

Conditional Question → Escalation Handling

(appears only if customer requested supervisor)

Permissions

Permission	Description
Quality > Evaluation Form > Add	Create new evaluation forms
Quality > Evaluation Form > Edit	Modify existing forms
Quality > Evaluation Form > Delete	Remove forms

Dependencies

Component	Purpose
Interaction Recording	Provides interactions to be evaluated using the form
Quality Policies	Reference evaluation forms when assigning evaluations
Evaluators	Use the form to score interactions
Quality Management (Admin)	Parent feature area

Implementation Checklist

Task	Status
Define evaluation categories (question groups)	<input type="checkbox"/>
Decide which questions require fatal logic	<input type="checkbox"/>
Select appropriate question types per question	<input type="checkbox"/>
Add help text to all questions	<input type="checkbox"/>
Configure scoring (points per answer)	<input type="checkbox"/>
Add conditional questions where appropriate	<input type="checkbox"/>
Save the form as draft	<input type="checkbox"/>
Review and validate the form	<input type="checkbox"/>
Publish the form	<input type="checkbox"/>
Reference the form in quality policies	<input type="checkbox"/>

Implementation Guide

Step	Action
Step 1	Navigate to <code>Admin → Quality → Evaluation Forms</code>
Step 2	Click Create
Step 3	Enter form name
Step 4	Add Question Groups
Step 5	Add questions to each group with the appropriate Question Type
Step 6	Configure Points , Help Text , and Comments settings per question
Step 7	Toggle Fatal or Critical where applicable
Step 8	Add Conditional logic where appropriate
Step 9	Save draft
Step 10	Click Publish to make the form available for use

Workflow

Admin Creates Evaluation Form



Question Groups Added



Questions Added (with type, points, help text)



Fatal / Critical Flags Set



Form Published



Policy References Form



Evaluator Uses Form to Score Interaction

Best Practices for Evaluation Forms

Practice	Reason
Use fatal questions sparingly	Prevent unnecessary evaluation failures
Reserve fatal for legal/compliance requirements	Only true pass/fail scenarios should auto-fail
Use range questions for soft skills	Better measures qualitative performance like empathy
Provide help text for every question	Improves evaluator consistency and reduces subjectivity
Group questions logically by topic	Makes evaluation easier to complete accurately
Use conditional questions	Reduces form complexity and irrelevant questions
Keep forms focused	Forms covering too many topics are harder to score consistently
Calibrate evaluators regularly against published forms	Ensures form is interpreted consistently

Naming Convention

Resource	Example
Evaluation Form	Support_Call_Evaluation_Form
Question Group	Compliance / CustomerExperience / ProductKnowledge

Limitations / Constraints

Constraint	Description
Form must be published	Forms in draft state cannot be used in policies or evaluations
Version tracking	Last-modified timestamp is the version ID — no formal versioning system

Constraint	Description
Arabic dialect limitation	Date/time display does not currently appear in standard Arabic format — to be resolved in a future update

Interview Cheat Sheet

Question	Answer
Where are evaluation forms managed?	Admin → Quality → Evaluation Forms
What permissions are required?	Quality > Evaluation Form > Add / Edit / Delete
What is a Fatal Question?	A question that automatically fails the entire evaluation if answered incorrectly
When should fatal questions be used?	Only for true compliance or legal requirements
What is a Critical Question?	High-importance question that impacts score but does NOT auto-fail the evaluation
Why use range questions?	To evaluate qualitative performance like empathy or professionalism
What is the version ID of a form?	The last-modified date/time timestamp shown on the form list
What does publishing a form do?	Makes it available for evaluators and for reference in quality policies

Key Takeaways

Topic	Summary
Evaluation Forms	Structured templates used by evaluators to score recorded interactions
Navigation	Admin → Quality → Evaluation Forms or Menu → Conversational Intelligence → Quality Management → Evaluation Forms
Version ID	Last-modified timestamp on the form list page
Fatal Questions	Auto-fail the entire evaluation — reserve for compliance/legal requirements only
Critical Questions	High impact on score but do not auto-fail
Question Types	Multiple Choice / Yes-No / Range
Publish Required	Forms must be published before they can be used

Topic	Summary
Permissions	Quality > Evaluation Form > Add / Edit / Delete

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