

Internal Quality Assurance Review

Internal QA Process

Once the configuration analyst submits the completed checklist and configuration report in salesforce and changes the milestone to QA review, the Internal QA team will assess the data and provide feedback. The configuration analyst will make the appropriate corrections and resubmit. This process continues until all corrections have been amended and the QA has been approved. An initial score of 97 or above is considered passing.

Save the QA Review

The approved QA review needs to be saved in Salesforce under the Implementation project and on the XDrive in the client folder.

Salesforce:

1. Pull up the client in Salesforce
2. Select Projects from the top menu bar
3. Click on the Implementation Project
4. Save the approved QA Review under the notes and attachments section

OR

1. Type in the project number
2. Save the approved QA review under the notes and attachments section

XDrive:

1. Follow the path: **X: Company/PlanSource/Clients**
2. Locate the new client folder
Note: Remember to search for the client under the broker's name
3. Click on the Implementation Folder
4. File the approved QA Review:
Configuration folder > Quality Assurance > Internal QA approval