

# Basic Assurances® Survey Quick Guide

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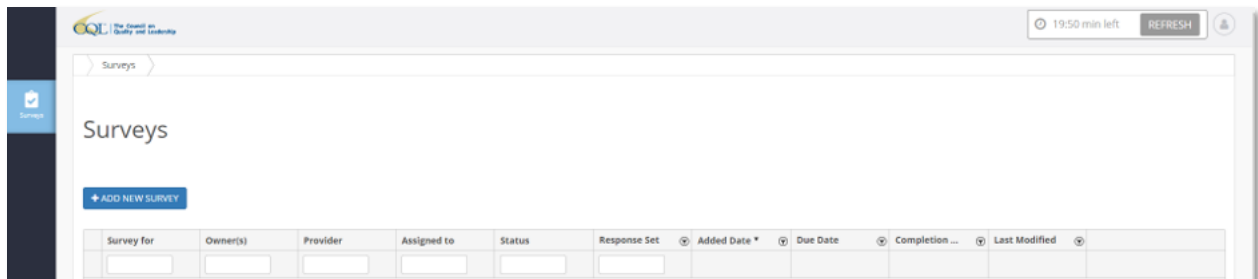
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## Basic Assurances® Survey

Users who have permission can complete Basic Assurances® surveys from the CQL PORTAL Data System. A Basic Assurances® survey contains ten sections – organized through the Basic Assurances® Factors - with all required questions. Multiple users can edit the survey at the same time but are restricted to only edit sections that are not currently being edited by other users. Once a Basic Assurances® survey is filled out it can be completed and then will automatically be sent to CQL’s accreditation team for a response.

### Navigate to the CQL Survey Landing Page

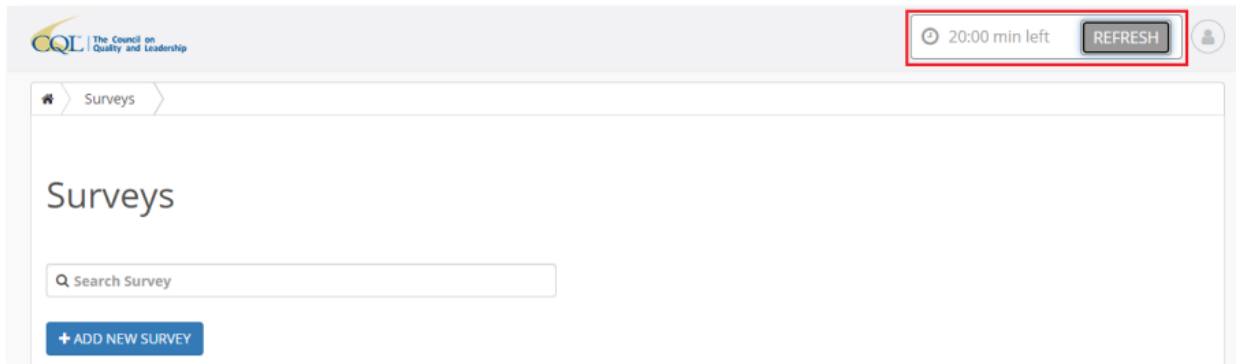
1. From the Survey Landing Page user will be able to view, start or continue an existing Basic Assurances® survey.



2. The Survey Landing Page will display each survey the user has access to view or edit within a grid with the following fields:
  - a. **Survey for:** The Provider name that the survey is being completed for
  - b. **Owner(s):** Displays the name of the provider who will be responding to the survey
  - c. **Provider:** Displays the name of the Provider Agency
  - d. **Assigned to:** Displays the Provider Agency designated to complete the survey
  - e. **Status:** Displays the current status of the survey:
    - i. Not Started
    - ii. In Progress
    - iii. Completed
  - f. **Response Set:** Displays the Response Set the survey represents:
    - i. **Response 1:** Initial survey completed by the provider
    - ii. **Response 2:** Reviewer validation (typically CQL)
    - iii. **Response 3:** Mid-cycle response completed by the provider
    - iv. **Response 4:** Reviewer mid-cycle response (typically CQL)
  - g. **Added Date:** Date and timestamp that the survey was initiated
  - h. **Due Date:** Date the survey is due by
  - i. **Completion Date:** Displays the most recent completed date

- j. **Last Modified:** Displays the date and time of the most recent changes to the survey

**Note:** The CQL PORTAL Data System has a built in 20:00 minute inactivity auto log-off security feature. If a user is not active on the PORTAL within that 20-minute period, then an automatic log off will occur. Users are alerted when there are only 3:00 minutes remaining on the timer. Users can reset the timer to 20:00 minutes by clicking the **Refresh** button.



## Search for a Survey

1. Users can search by the data populated within any field on the Survey Landing Page table.

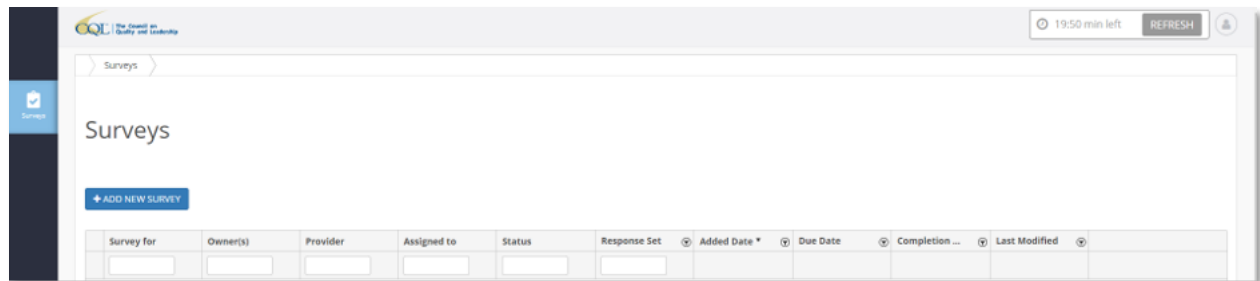
Survey for	Owner(s)	Provider	Assigned to	Status	Response Set	Added Date	Due Date	Completion ...	Last Modified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Users can also filter any column of the table using the text box or filter icon. Columns can be sorted in ascending or descending order by clicking on the column name.

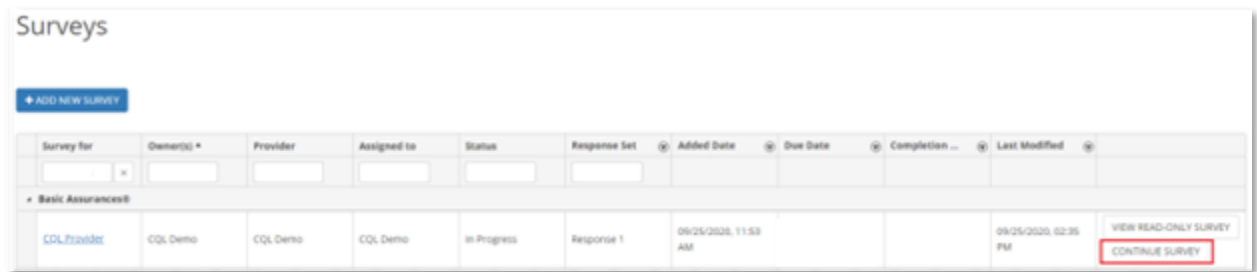
Survey for	Owner(s)	Provider	Assigned to	Status	Response Set	Added Date	Due Date	Completion ...	Last Modified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <p>Show items with value that:</p> <p>Is equal to <input type="text"/></p> <p>And <input type="text"/></p> <p>Is equal to <input type="text"/></p> <p><input type="button" value="FILTER"/> <input type="button" value="CLEAR"/></p> </div>									
CQL Provider	CQL Staff	CQL Demo	CQL Demo	In Progress	Response 2	09/25/2020, 11:56 AM			09/25/2020, 02:28 PM
CQL Provider	CQL Demo	CQL Demo	CQL Demo	In Progress	Response 1	09/25/2020, 11:53 AM			09/25/2020, 02:35 PM

## Begin or Continue a Survey

1. From the CQL Survey Landing Page the user can locate and begin the process of filling out an already initiated survey.

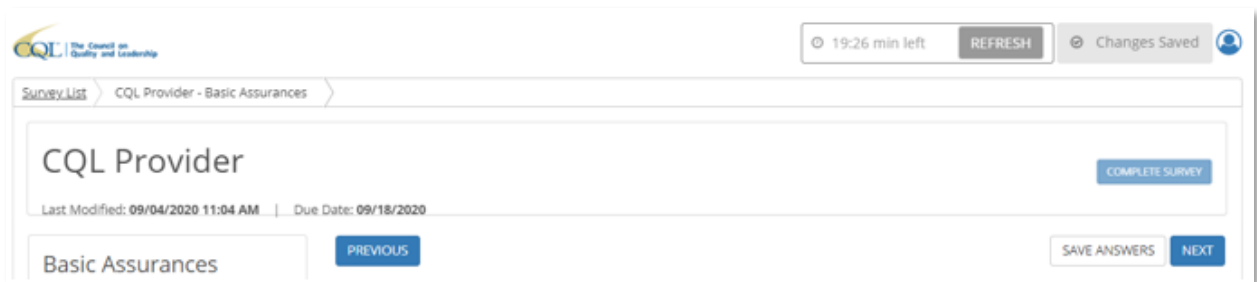


2. Click **Continue Survey** next to the applicable survey to open it.






2. The survey will open in a new browser tab. Users can click the following available buttons to navigate the survey:

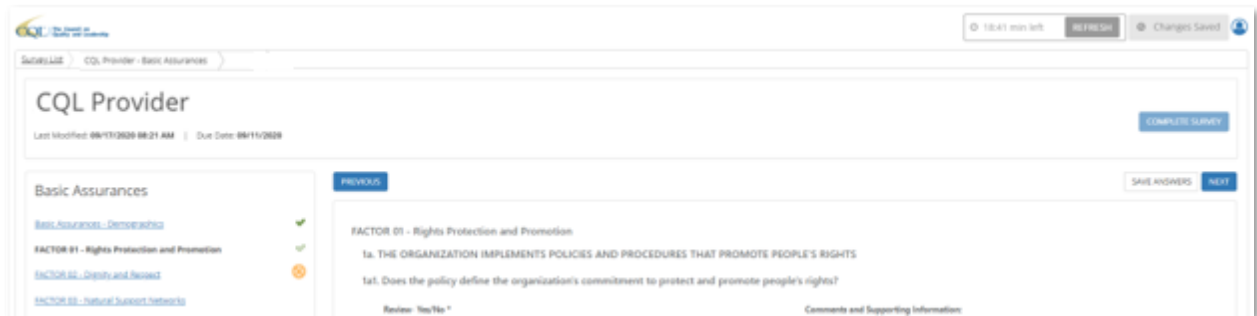
- a. **Previous:** Navigate to a previous page of the survey
- b. **Next:** Navigate to a later page of the survey
- c. **Save Answers:** Performs a save on all data  
**Note:** The survey does save changes as they are made. Users can reference the Changes Saved icon at the top of the page to confirm the current save status.
- d. **Complete Survey:** Updates the survey status to Complete  
**Note:** This button is grayed out until all required questions marked with an asterisk \* have been answered.



3. Users can navigate to different sections of the survey by clicking on the section name in the menu on the left. The menu also displays the status of each section of the survey:

- a. A solid checkmark  indicates all required questions in that section have been completed.
- b. A hollow checkmark  indicates there are unanswered required questions in that section.

- c. An orange X  indicates that another user is currently editing that page. You will not be able to access that page until the other user has exited the page.



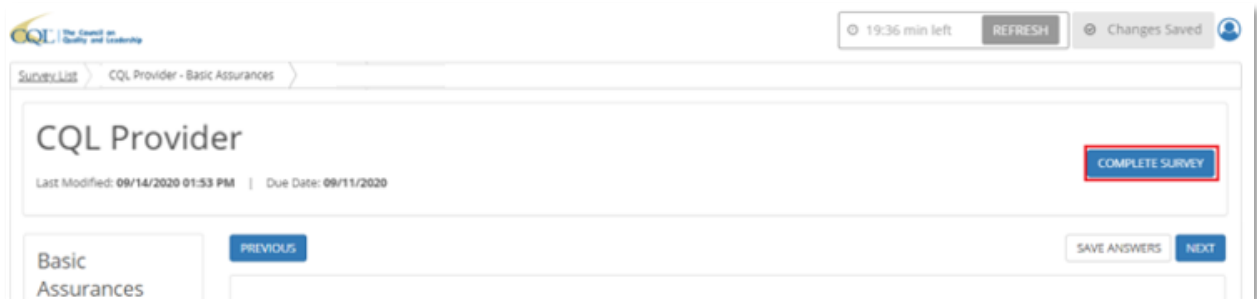
**Note:** Users have the ability to upload files throughout the survey, but these are not a required field.

4. To exit the survey, the user can close the browser or click **Complete Survey** if the survey is done and all required questions have been answered.

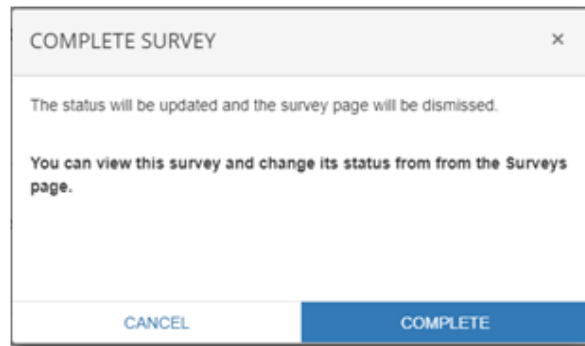
## Complete a Survey

1. Once all required questions have been answered, users can click the **Complete Survey** button to submit the survey.

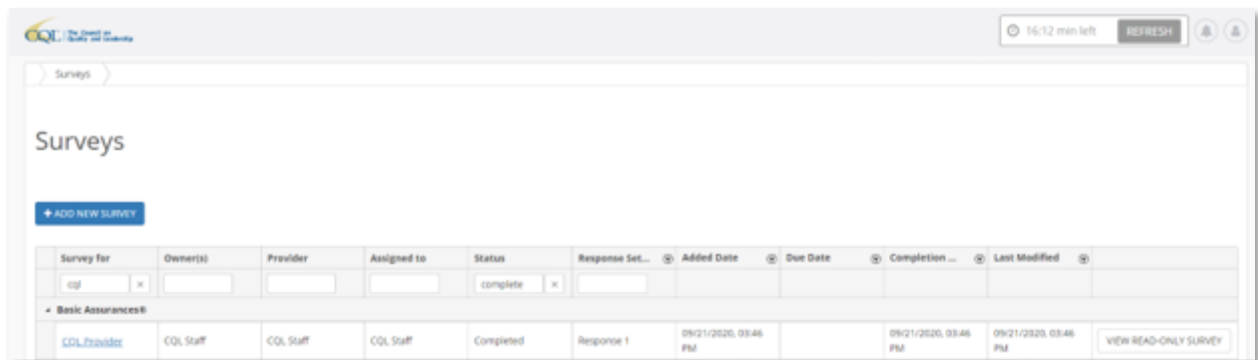
**Note:** This button is grayed out until all required questions marked with an asterisk \* have been answered.



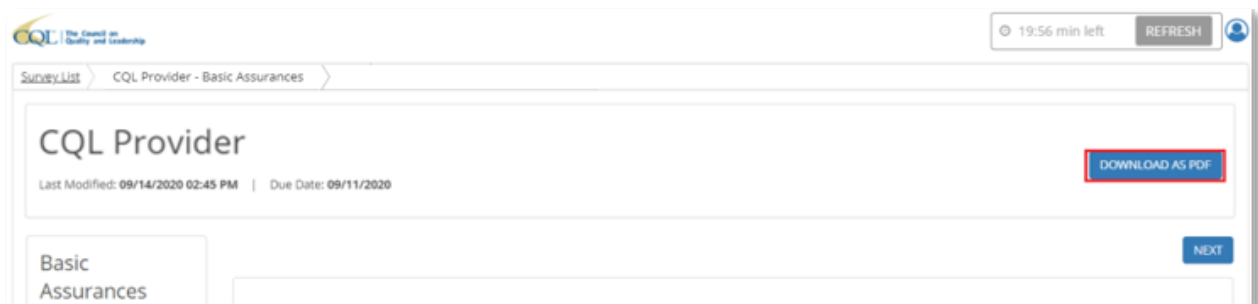
2. A popup will appear to confirm the user wishes to complete the survey. Click **Complete** to proceed or **Cancel** to return to the editable survey.



3. The user will be directed back to the Survey Landing Page where the Status and Completion Date will have updated for the newly completed survey.



4. Once the survey has been completed, the user will have the option to download a PDF copy of the survey by opening the read-only version and clicking on the **Download as PDF** button.



## View a Survey

1. Click on the Surveys icon to be taken to the Survey Landing Page to view an existing survey.
2. Click on the **View Read-Only Survey** button to open the survey in read-only mode.

Surveys

+ ADD NEW SURVEY

Survey for	Owner(s) *	Provider	Assigned to	Status	Response Set	Added Date	Due Date	Completion ...	Last Modified	
CQL Demo										
+ Basic Assurances®										
<a href="#">CQL Provider</a>	CQL Demo	CQL Demo	CQL Demo	In Progress	Response 1	09/25/2020, 11:53 AM	09/30/2020		09/25/2020, 02:35 PM	<a href="#">VIEW READ-ONLY SURVEY</a> <a href="#">CONTINUE SURVEY</a>

- The survey will open in read-only mode in a new browser tab. The user will be limited to the ability to view existing responses and navigate between pages using the **Previous** and **Next** buttons.

19:49 min left REFRESH

Survey List > CQL Provider - Basic Assurances >

## CQL Provider

Last Modified: 09/14/2020 02:45 PM | Due Date: 09/11/2020

Basic Assurances

PREVIOUS NEXT

DOWNLOAD AS PDF

- If the survey has been completed, the user will have the option to download a PDF copy of the survey by clicking on the **Download as PDF** button.

**Note:** Following the same instructions above, users can also view the survey in read-only mode after the CQL Accreditation Responses have been added.