

Survey Landing Page

The **Survey Landing Page** allows the user to view, manage, and add surveys.

1. The **Survey Landing Page** offers the user the following
 - a. Columns Dropdown – The user can select which columns to display or not display. See Detail Table Header section for details.
 - b. Add New Survey Button – The user can click Add New Survey to start a new survey. This will only display if user has permissions to add a survey. Please reference the Add a New Survey quick guide for full walkthrough of adding a survey.
 - c. Detail Table Header



2. Detail table header provides the following to assist a user:
 - a. **Survey Type:** Displays which Survey Type is to be used: Basic Assurances, POM Child and Youth, or POM Adult
 - b. **Survey For** – Can be selected via a “*Type to Filter*” or sorted by Column Header. Includes individual’s name or (for POM) or Provider Agency (for BA). Displays a link to open survey as editable or read only. Basic Assurances® surveys only displays as standard text (not a link) when the survey is being completed by a provider, and not yet assigned to the logged in user.
 - c. **Owner(s)** – Displays the name of the survey owner.
 - d. **Provider** – Displays the name of the provider.
 - e. **Assigned To** – Displays the user or group display name
 - f. **Status** – Displays the current status of the survey
 - i. Not Started
 - ii. In Progress
 - iii. Completed
 - iv. Finalized
 - v. Canceled

- vi. In Use by
- g. **Response Set:** Displays the Response Set the survey represents (BA Survey Only). POM surveys will display N/A.
 - 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)
- h. **Added Date** – Date that survey was initiated
- i. **Due Date** – Date that survey is due by
- j. **Survey Conducted** – Displays the date that the survey was conducted
- k. **Completion Date** – Displays the most recent completed date
- l. **Last Modified** – Displays the date and time of the most recent changes to the survey

Survey Type	Survey for	Owner(s)	Provider	Assigned to	Status	Response Set	Added Date ↑	Due Date ↓	Survey Conducted ↓	Completion Date ↓	Last Modified ↓

3. On the survey header click **More** for actionable survey commands
 - a. **View Read-Only Survey** – Will only appear if there are read-only survey versions available to view
 - b. **Continue Survey** - Opens a *Not Started*, or *In Progress* survey
 - c. **Assign Survey** – User access dependent. Opens new *Assign Surveys* screen. Assign the survey to whom it needs to be done by and click **Assign**.
 - d. **Reopen Survey** – Opens a completed survey for those users who have permission to do so. Once survey reopens it will be in a In Progress status.