

CQL POM Survey Quick Guide

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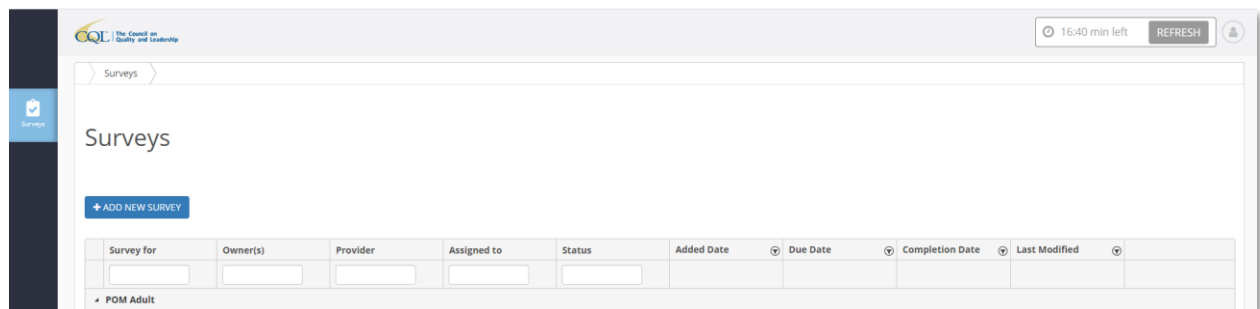
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POM Survey

Users who have administrative rights can create and initiate single-user assignment / single-response POM surveys from the CQL PORTAL Data System. Single-User-Assignment surveys are configured to allow only one user per survey. Single-Response surveys allow only one set of answers per survey (multiple people can collaborate).

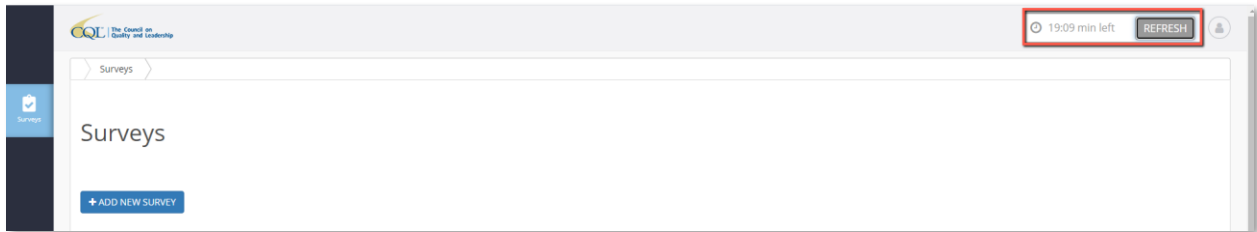
Navigate to the CQL Survey Landing Page

1. A user can click on the Surveys icon to be taken to the Survey Landing Page to view, initiate, or continue an existing survey.



2. The Survey Landing Page will display each survey the user has access to view or edit within a table with the following fields:
 - a. **Survey for:** The last, first name of the person receiving services who was interviewed
 - b. **Owner(s):** Displays the name of the provider who will be completing the survey
 - c. **Provider:** Displays the name of the Provider Agency of the person receiving services who was interviewed
 - d. **Assigned to:** Displays the user designated to complete the survey
 - e. **Status:** Displays the current status of the survey:
 - i. Not Started
 - ii. In Progress
 - iii. Completed
 - f. **Added Date:** Date and timestamp that the survey was initiated
 - g. **Due Date:** Date the survey is due by, if applicable
 - h. **Completion Date:** Displays the most recent completed date
 - i. **Last Modified:** Displays the date and time of the most recent changes to the survey

Note: PORTAL has a built-in 20:00 minute inactivity auto log-off security feature. If a user is not active on 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 at any point prior to automatic log-off 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.

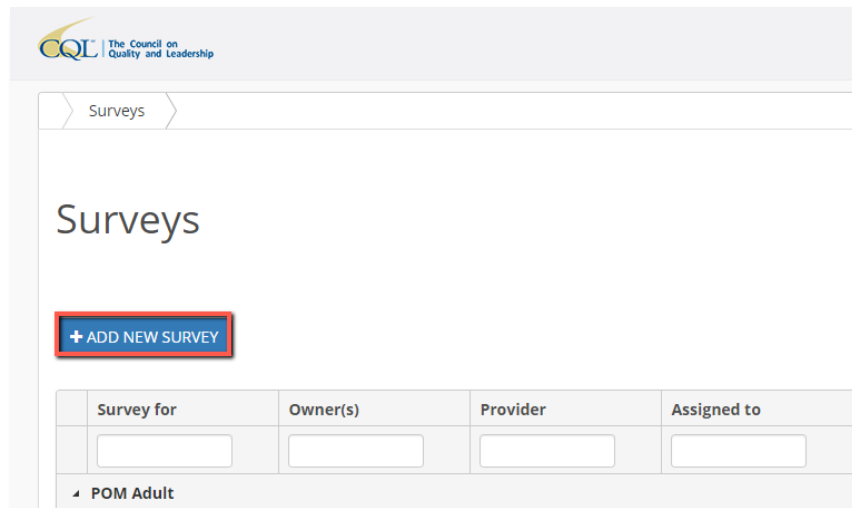
Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				

2. 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.

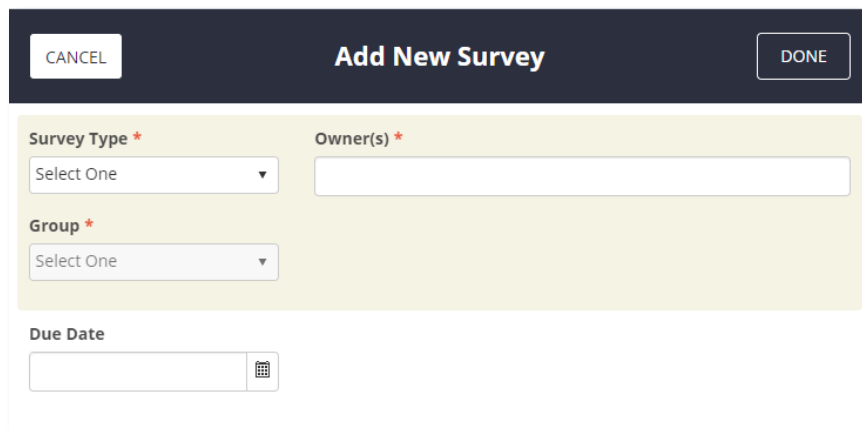
Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Show items with value that:</p> <p>Is equal to</p> <p>And</p> <p>Is equal to</p> <p><input type="button" value="FILTER"/> <input type="button" value="CLEAR"/></p> </div>								
<ul style="list-style-type: none"> Basic Assurances POM Adult <ul style="list-style-type: none"> Andrews, Betty A+ Care Solutions, Inc. A+ Care Solutions, Inc. Provider, Kelly Test In Progress 09/08/2020, 04:55 PM 09/08/2020, 05:00 PM MORE I Andrews, Betty A+ Care Solutions, Inc. A+ Care Solutions, Inc. Provider, Kelly Test In Progress 09/08/2020, 08:31 AM 09/08/2020, 05:19 PM MORE I Jones, Sam A+ Care Solutions, Inc. A+ Care Solutions, Inc. Provider, Kelly Test In Progress 09/09/2020, 11:36 AM 09/10/2020, 08:15 AM MORE I 								

Add New Survey

1. From the user's Surveys landing page, click on the **Add New Survey** button



2. The **Add New Survey Drawer** opens



3. A user will need to complete all required fields before they can begin a survey.

Required fields are visible with a red asterisk *

- a. **Survey Type:** A drop-down filter containing the following survey types to choose from:
 - i. POM Adult
 - ii. POM Child

- b. **Owner(s):** A multi-select section. Users shall only be able to choose from the organization that they are associated with. The agency selected here is responsible for completing the survey.
- c. **Group:** The agency selected here is the organization that provides supports for the person. This field will pre-populate for logged in users who are only affiliated to one organization. If the logged in user has permissions to initiate surveys for multiple organizations, then the drop-down will provide a filtered list to choose from.
Note: Owner and Group will always be the same unless the interview is being entered by CQL Staff. If entered by a CQL Staff user, the Owner is CQL Staff and the Group is the provider organization that the individual is supported by.
- d. **Assignee(s):** This field defines who the survey will be assigned to. Drop-down field that is dependent on what is selected from the Owner(s) drop-down.
Note: If a survey is started by a supervisor or a person with access level above a standard user then they will be able to assign the survey to a user who is associated to the provider organization. If initiated by a standard user with limited access, the survey will automatically be assigned to that user and the field will not display.
- e. **Member Type:** A member is the person supported. A drop-down field containing the following:
 - i. **Existing Member:** A person receiving services currently in the database. Searchable by first, last name and DOB.

The screenshot shows the 'Add New Survey' form with the following fields filled out:

- Survey Type ***: POM Adult
- Owner(s) ***: A+ CARE SOLUTIONS, INC. x
- Group ***: A+ Care Solutions, Inc.
- Assignee(s) ***: PROVIDER, KELLY TEST x
- Member Type ***: Existing Member
- Member ***: Select One
- Due Date**: (Empty date picker)

- ii. **Create Member:** The person receiving services is new to the organization and/or not yet in the CQL PORTAL Data System.
 1. **Member Identifier:** Enter Internal Provider Member identifying information for the person receiving services.
 2. **Member Name:** Enter first and last name of the person receiving services.

The screenshot shows the 'Add New Survey' form with the following fields filled out:

- Survey Type ***: POM Child
- Owner(s) ***: ALL CARE HOME HEALTH, LLC x
- Group ***: All Care Home Health, LLC
- Member Type ***: Create Member (Name)
- First Name ***: (Empty text input)
- Last Name ***: (Empty text input)

- f. **Due Date:** Manual entry from date picker for tracking and filtering purposes. This is optional.
4. Once all information from the Add New Survey is filled out, click **Done** to save the survey.

- The survey will now appear in the table on the Survey Landing Page. Click on **Continue Survey** to begin the survey.

Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified
POM Adult								
Andrews, Betty	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	Not Started	09/08/2020, 20:55 PM	09/30/2020		09/08/2020, 20:55 PM CONTINUE SURVEY

Continue/Edit a Survey

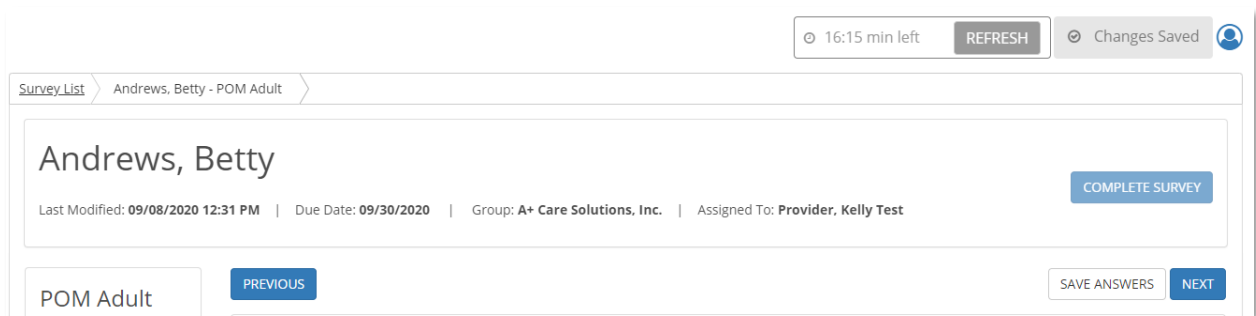
- From the Survey Landing Page, a user can continue an existing survey.

- A user can click on the **Continue Survey** button next to the applicable survey to open and continue editing the survey.

Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified
POM Adult								
Andrews, Betty	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	Not Started	09/08/2020, 20:55 PM	09/30/2020		09/08/2020, 20:55 PM CONTINUE SURVEY

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

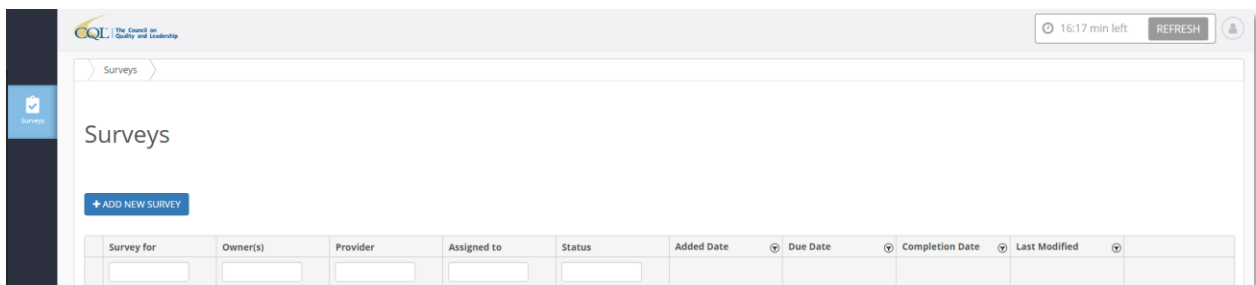
- a. **Previous:** Navigate to a previous page of the survey
- b. **Next:** Navigate to a later page of the survey
- c. **Save Answers:** Performs a save on all data
Note: The survey does save changes as they are made. Users can reference the Changes Saved icon at the top of the page to confirm the current 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.



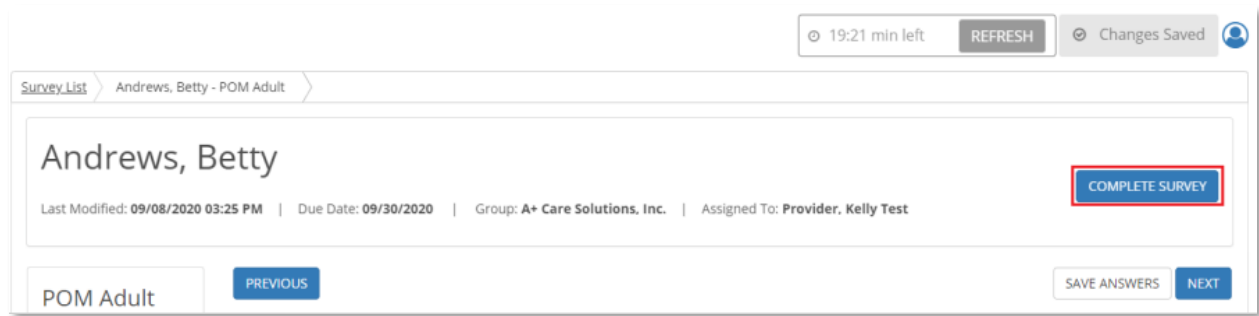
4. To exit the survey, the user can close the browser or click **Complete Survey** if the survey is done and all required questions have been answered.

Complete a Survey

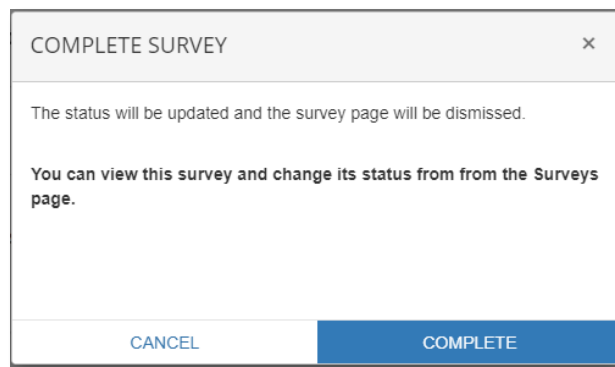
1. From the Survey Landing Page, a user can complete an existing survey.



2. Follow the instructions above to add a new survey or continue an existing survey.
3. 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.



4. 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.



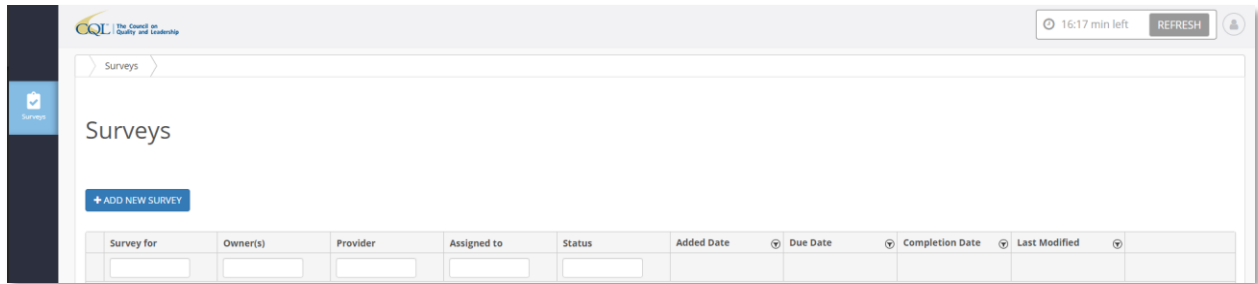
5. The user will be directed back to the Survey Landing Page where the Status and Completion Date will have updated for the newly completed survey.

Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified	
POM Adult									
Andrews, Betty	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	Completed	09/08/2020, 12:31 PM	09/30/2020	09/08/2020, 12:31 PM	09/08/2020, 18:03 PM	VIEW READ-ONLY SURVEY REOPEN SURVEY

6. The user can click on the **View Read-Only Survey** button to access the survey and download as a PDF after it has been completed.

Reopen a Completed Survey

1. From the Survey Landing Page, a user can view an existing, completed survey.



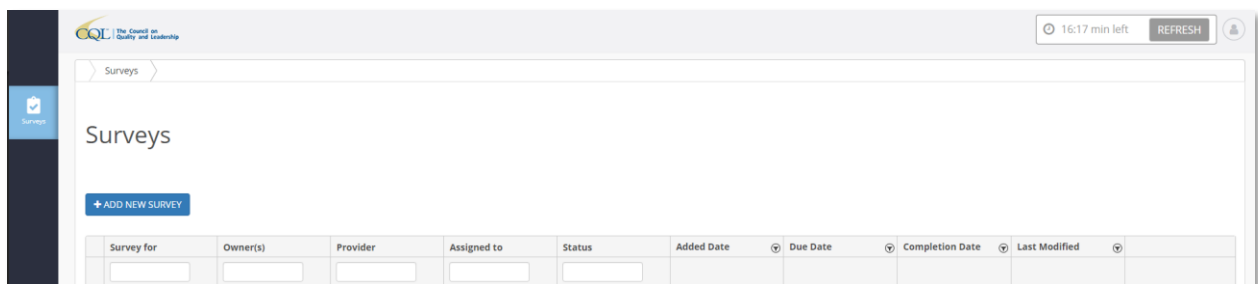
2. A user can click on the **Reopen Survey** button next to the applicable survey to reopen it in an editable format.

Note: The Completion Date and Status fields will be updated to reflect the current status.

Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified	
POM Adult									
Andrews, Betty	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	Completed	09/08/2020, 12:31 PM	09/30/2020	09/08/2020, 12:31 PM	09/08/2020, 18:03 PM	VIEW READ-ONLY SURVEY REOPEN SURVEY

View a Survey

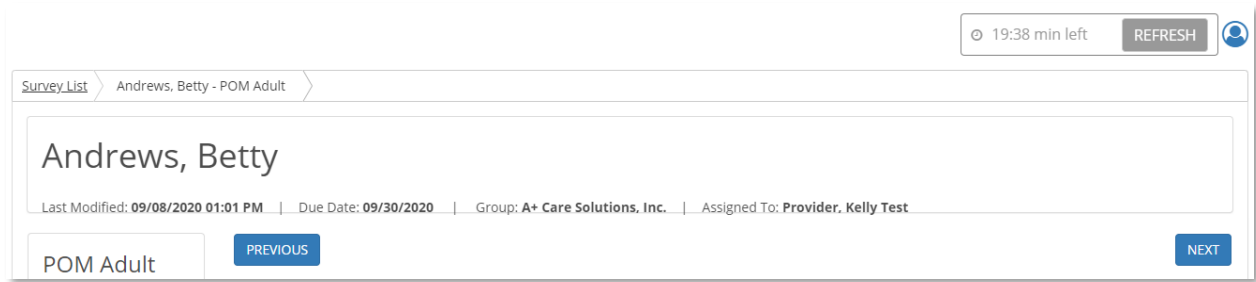
1. From the Survey Landing Page, a user can view an existing survey.



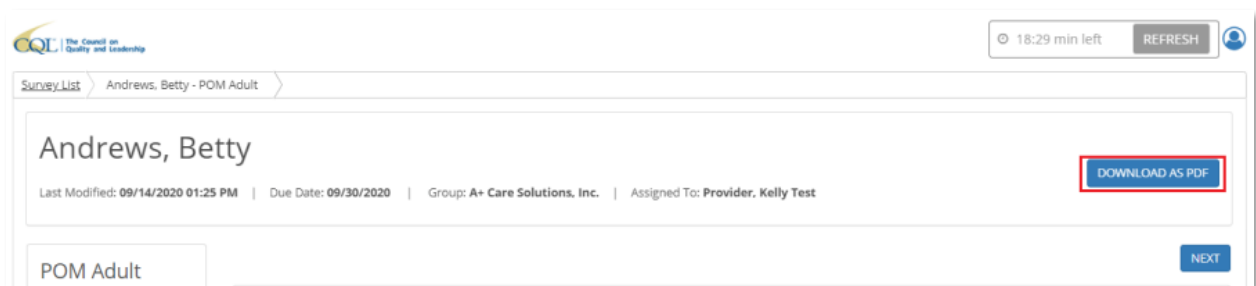
2. Click on the **View Read-Only Survey** button to open the survey in read-only mode.

Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified	
POM Adult									
Andrews, Betty	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	In Progress	09/08/2020, 20:55 PM	09/30/2020		09/08/2020, 21:00 PM	VIEW READ-ONLY SURVEY CONTINUE SURVEY

3. 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 with the **Previous** and **Next** buttons.



- 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.

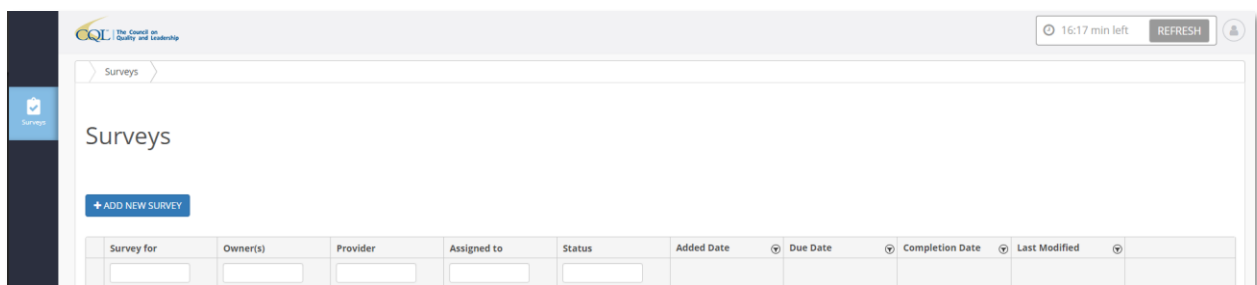


Assign a Survey

If necessary, POM surveys can be reassigned from one user to a different user at the same organization to complete.

Note: Only users with the appropriate access level will have the ability to reassign a survey.

- From the Survey Landing Page a user can locate the applicable survey.
Note: Users with the appropriate access to reassign will have visibility to all surveys associated to the Owner(s).



- The user will click on the **More** button and select **Assign Survey** from the available options.
Note: If the survey is in a status of Not Started, the user will select the **Assign Survey** button instead.

Survey for	Owner(s)	Provider	Assigned to	Status	Added Date	Due Date	Completion Date	Last Modified	
Basic Assurances									
POM Adult									
Jones, Sam	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	Not Started	09/09/2020, 15:36 PM	09/25/2020		09/09/2020, 15:36 PM	ASSIGN SURVEY CONTINUE SURVEY
Andrews, Betty	A+ Care Solutions, Inc.	A+ Care Solutions, Inc.	Provider, Kelly Test	In Progress	09/08/2020, 20:55 PM	09/30/2020		09/08/2020, 21:00 PM	MORE View Read-Only Survey Assign Survey Continue Survey

- The user will select from the drop-down list of available users (based on the Owner) to reassign the survey to in the **Assigned To** box. The **Due Date** can also be updated, if applicable. Once complete, click **Continue**.

Assign Survey

Assigned To *

Due Date

CANCEL
CONTINUE