CQL POM Survey Quick Guide

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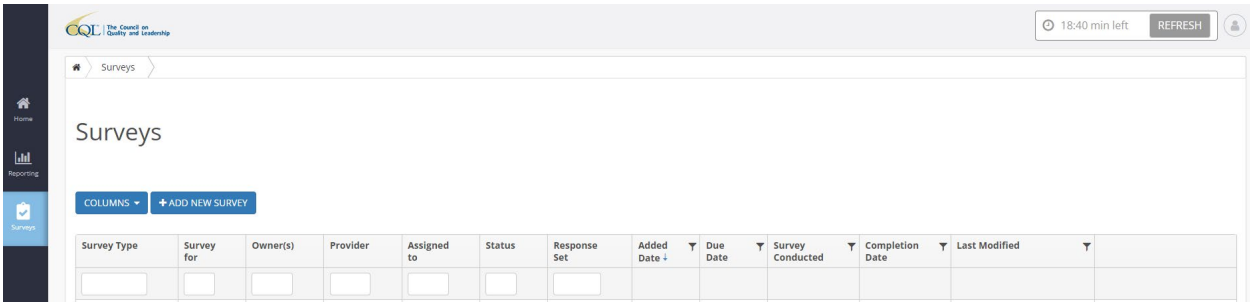
POM Survey

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.
   Note. The user can select which columns to display or not display using the **Column Dropdown**.



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 Type:** Displays which Survey Type is to be used: Basic Assurances, POM Child and Youth, or POM Adult
   b. **Survey for**: The last, first name or member ID of the person receiving services who was interviewed
   c. **Owner(s)**: Displays the name of the organization that is responsible for completing the survey.
   d. **Provider**: Displays the name of the Provider Agency of the person receiving services who was interviewed.
   e. **Assigned to**: Displays the user designated to enter the survey.
   f. **Status**: Displays the current status of the survey:
      i. Not Started
      ii. In Progress
      iii. Completed

g. **Response Set:** Displays the Basic Assurances 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)

h. **Added Date**: Date and timestamp that the survey was initiated

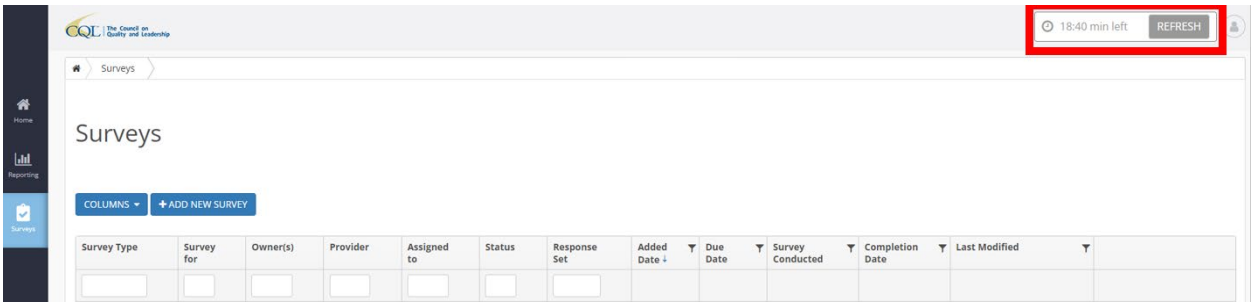
i. **Due Date**: Date the survey is due by, if applicable

j. **Survey Conducted**: Date the survey was conducted

k. **Completion Date**: Displays the most recent completed date

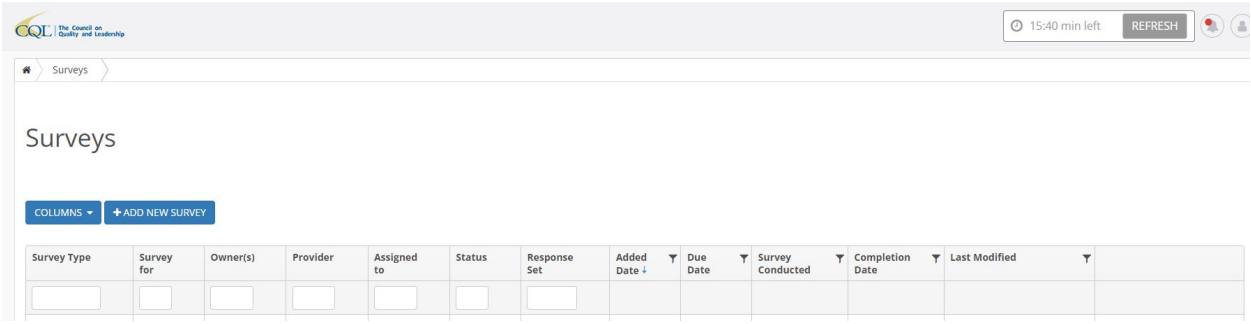
l. **Last Modified**: Displays the date and time of the most recent changes to the survey

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.

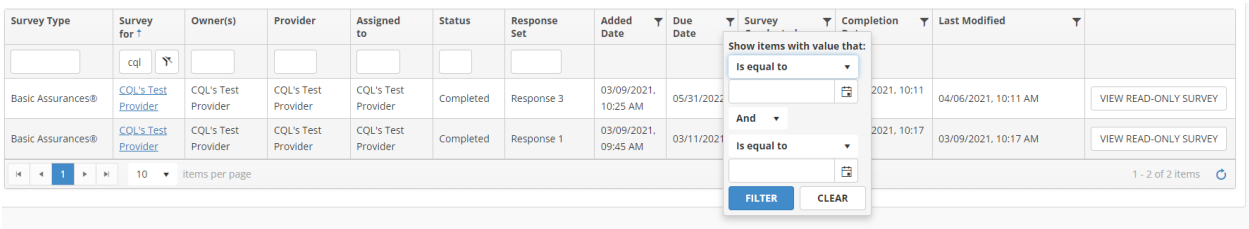


Search for a Survey

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

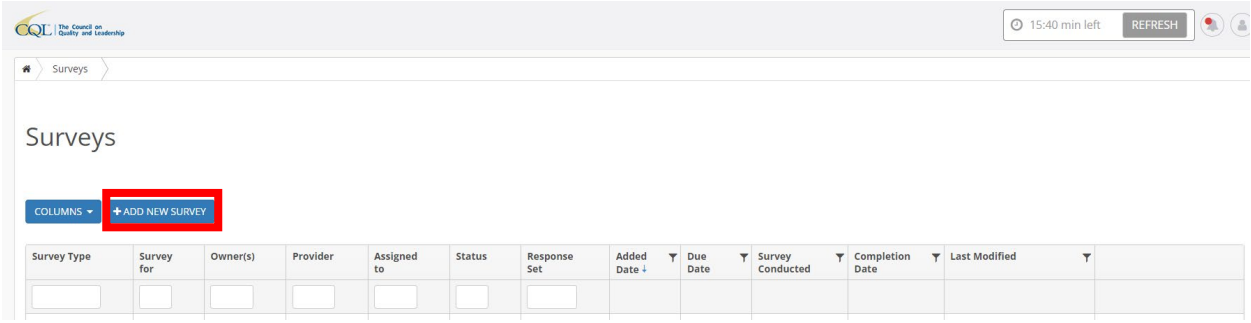


2. Users can also filter any column of the table using the text box or filter icon. Columns can be sorted in ascending or descending order by clicking on the column name.

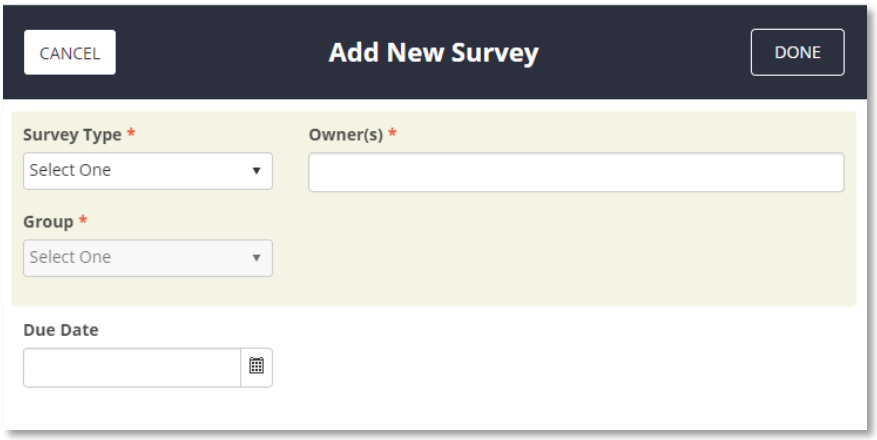


Add New Survey

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

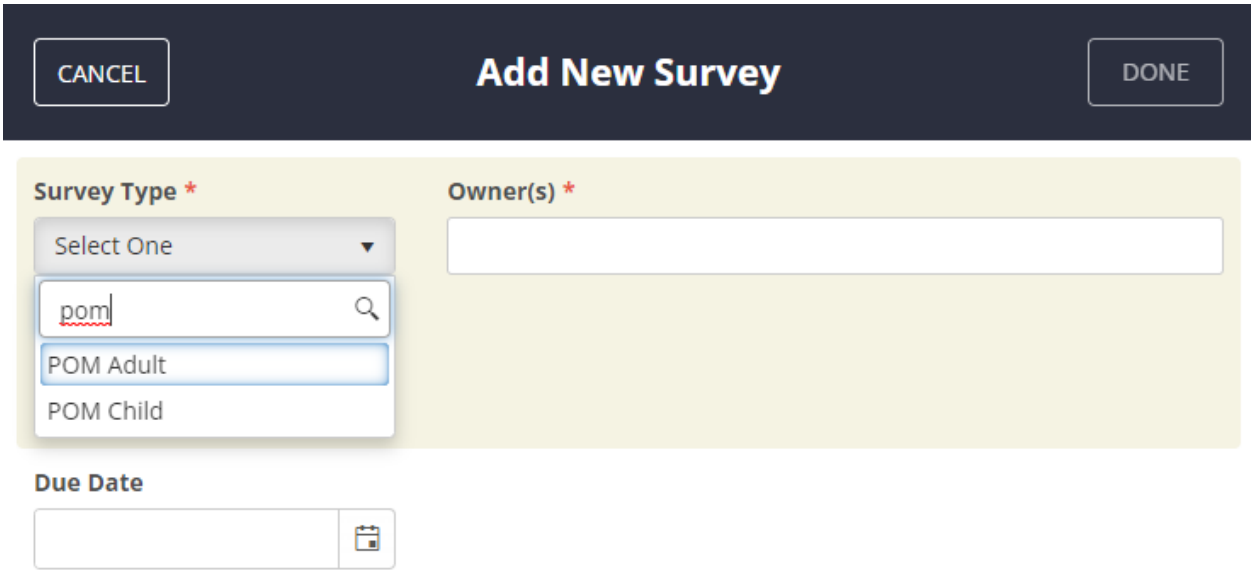


2. The **Add New Survey Drawer** opens



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):. You will select the organization that is responsible for completing the survey. Users will only be able to choose from the organization(s) that they are associated with.

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.

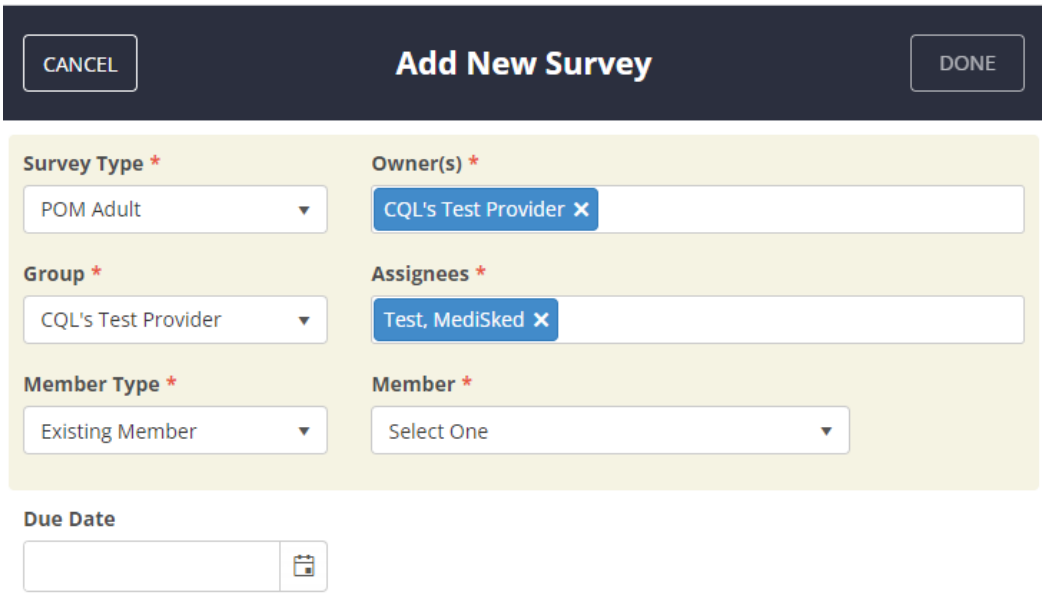
Note: Owner and Group will always be the same unless the interview is being entered by CQL Staff. If entered by a CQL Staff user, the Owner is CQL Staff and the Group is the provider organization that the individual is supported by.

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.

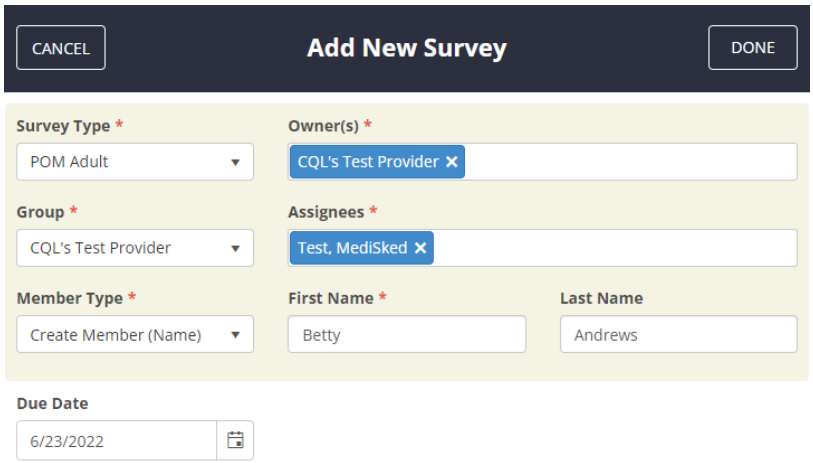
e. Member Type: A member is the person receiving services who participated in the Personal Outcome Measures® (POM) interview. A drop-down field containing the following:

i. **Existing Member**: A person receiving services currently in the database. You can search by first name, last name, or their Member Identifier.



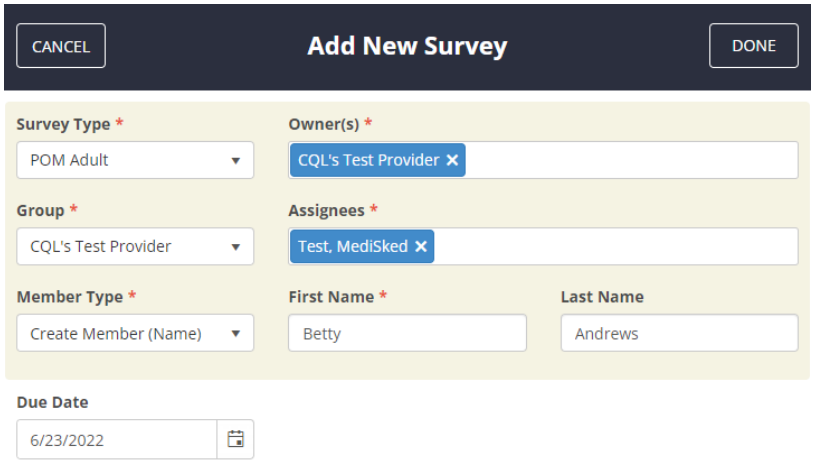
ii. **Create Member**: The person receiving services is new to the organization and/or not yet in the CQL PORTAL Data System.

1. **Member Identifier**: Enter Internal Provider Member identifying information for the person receiving services. Do not use Social Security Numbers, Medicaid ID Numbers, etc. that are associated with a person as their unique identifier. If organizations are using unique identifiers, they must independently document which unique identifiers are associated with individual people within their own secure platform or system.
2. **Member Name**: Enter the first and last name of the person receiving services who participated in the POM interview.

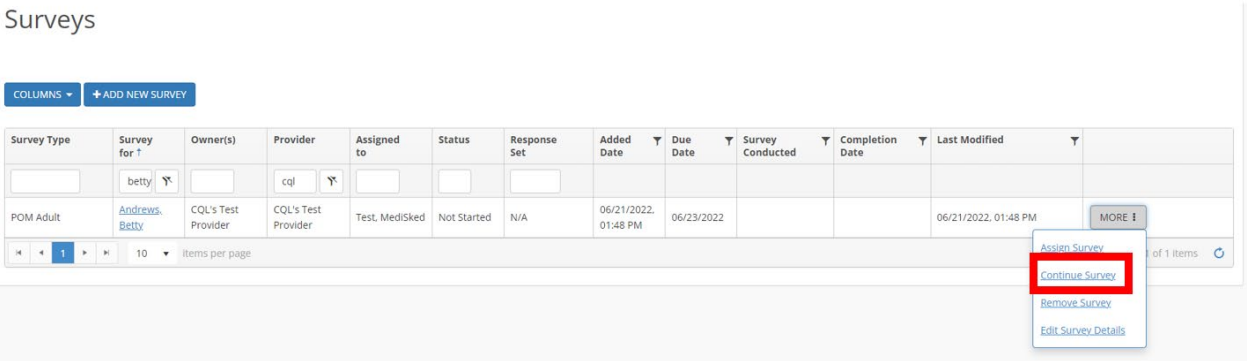


f. **Due Date**: You can select a date that the POM survey should be completed by, using a date picker for tracking and filtering purposes. This field is optional.

4. Once all information from the Add New Survey is filled out, click **Done** to save the survey.

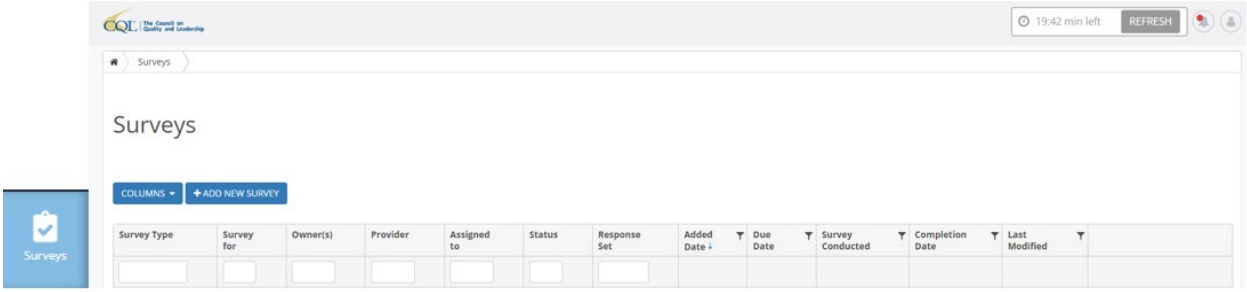


5. The survey will now appear in the table on the Survey Landing Page. Click on **Continue Survey** to begin the survey.

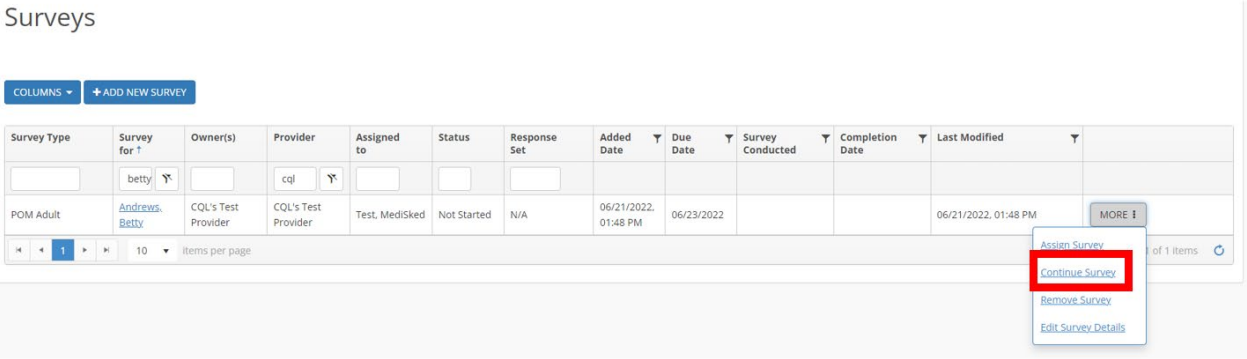


Continue/Edit a Survey

1. Click on the Surveys icon to be taken to the Survey Landing Page to continue an existing survey.



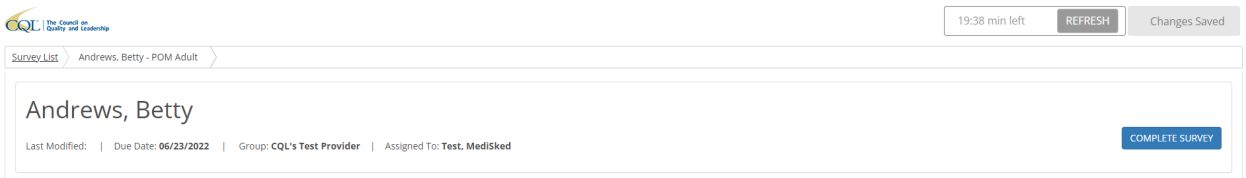
2. A user can click on the **Continue Survey** button next to the applicable survey to open and continue editing the survey.



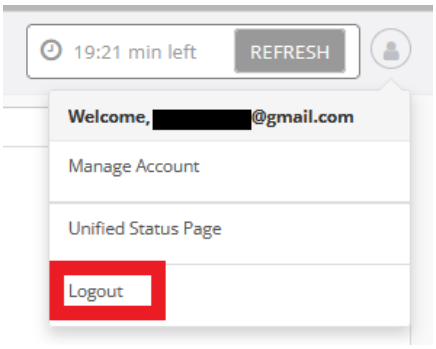
3. The survey will open in a new browser tab. Users can click the following available buttons to navigate the survey:
   a. **Previous**: Navigate to the previous page of the survey
   b. **Next**: Navigate to a later page of the survey
   c. **Save Answers**: Performs a save on all data

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.

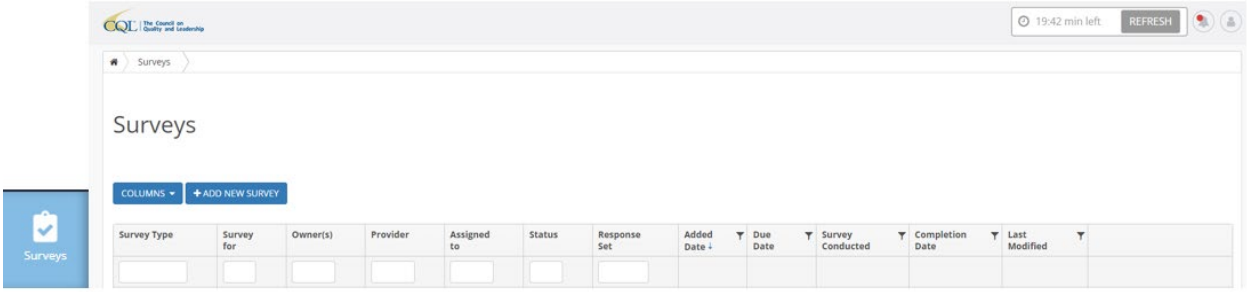


4. To exit the survey, the user can log out of the survey using the icon at the upper right corner or click **Complete Survey** if the survey is done and all required questions have been answered.



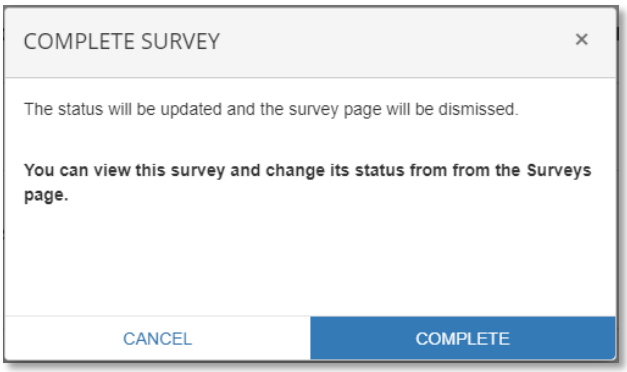
Complete a Survey

1. Click on the Surveys icon to be taken to the Survey Landing Page.

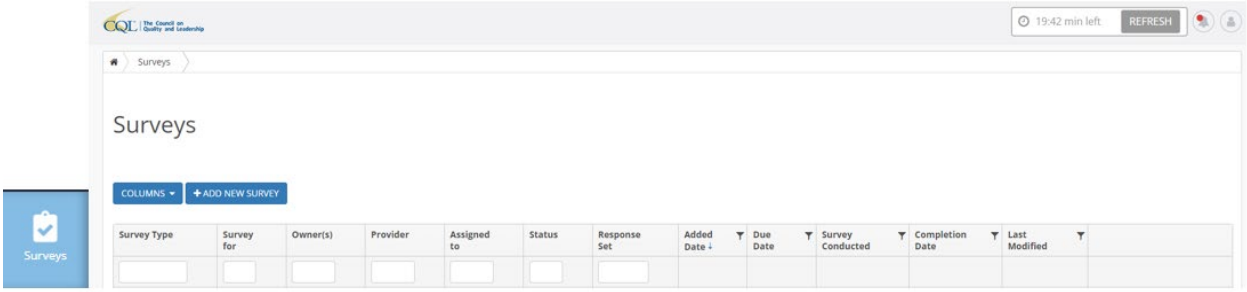


2. Follow the instructions above to add a new survey or continue an existing survey.
3. Once all required questions have been answered, users can click the **Complete Survey** button to submit the survey.
Note: This button is grayed out until all required questions marked with an asterisk * have been 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.



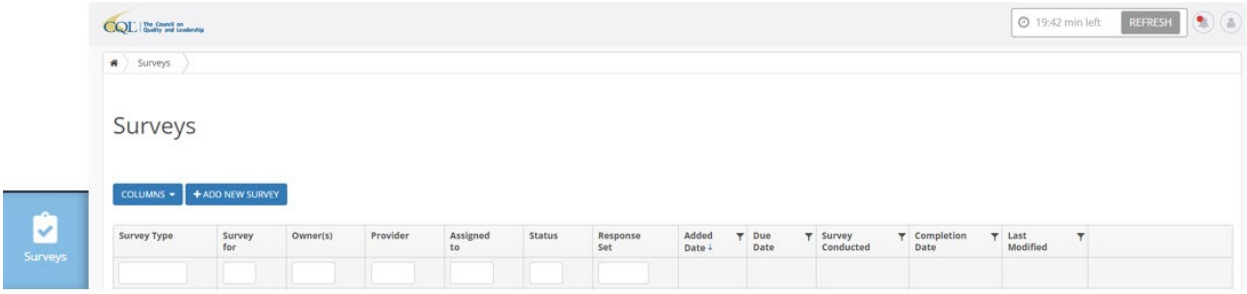
5. The user will be directed back to the Survey Landing Page where the Status and Completion Date will have updated for the newly completed survey.



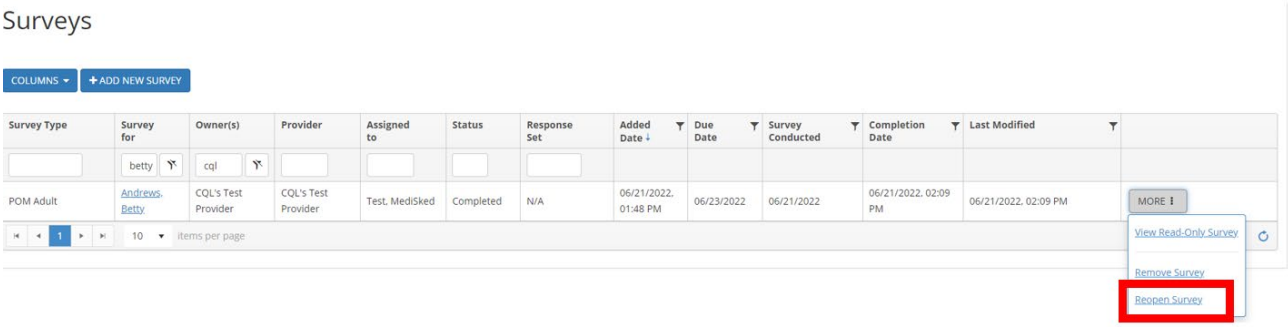
6. The user can click on the **View Read-Only Survey** button to access the survey and download as a PDF after it has been completed.

Reopen a Completed Survey

1. Click on the Surveys icon to be taken to the Survey Landing Page to view an existing, completed survey.

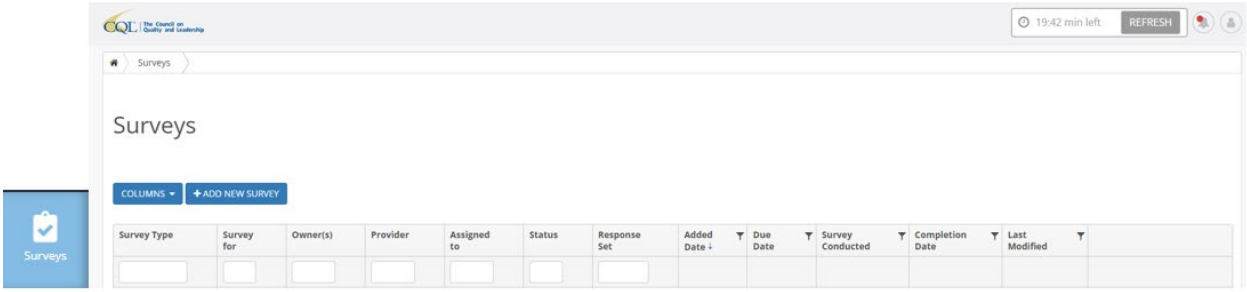


2. Click on the **More** button and select **Reopen Survey**.
   Note: The Completion Date and Status fields will be updated to reflect the current status.

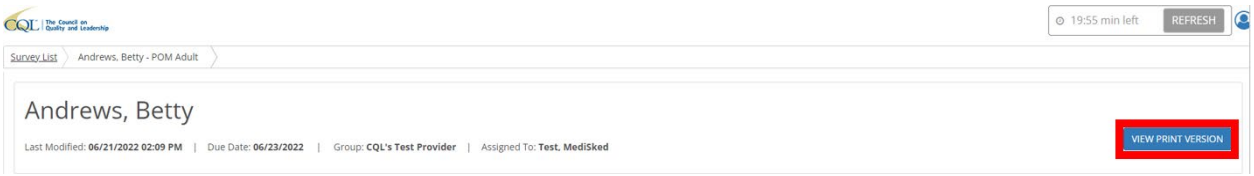


View a Survey

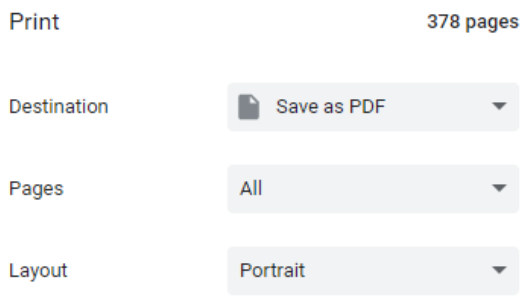
1. Click on the Surveys icon to be taken to the Survey Landing Page to view an existing survey.



2. Click on the **More** button and select **View Read-Only Survey** button to open the survey in read-only mode.
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.
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 **View Print Version** button.



5. A new browser tab will open. This will include a popup automatically displaying a print dialogue box (if this box does not pop-up, select Control-Q or Command-Q on your keyboard).

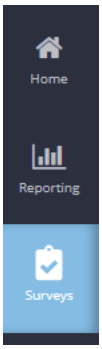


6. To download the PDF, ensure the destination dropdown says, “Save as PDF” (rather than “Print to PDF”) and then click **Save**. If you would rather print the document, click the destination dropdown, and change it to your local printer and click **Print.**

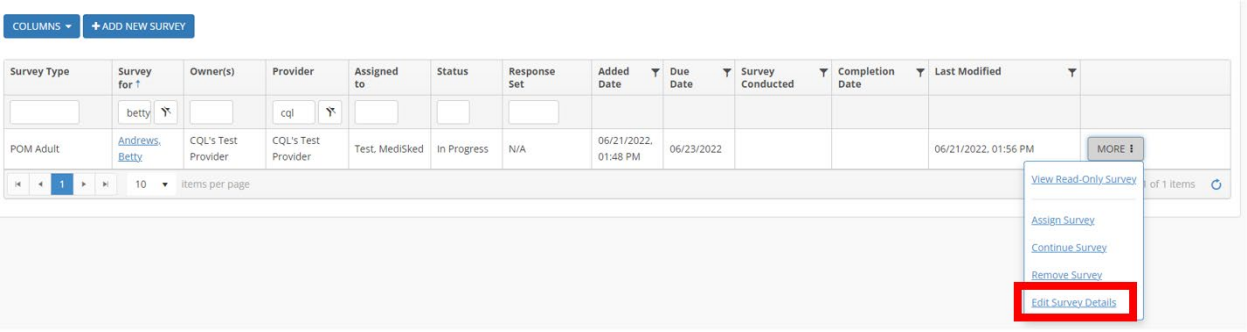
Edit Survey Details

If necessary, the Member Name/Identifier, Assignee and/or Due Date can be edited after a survey has been added.
Note: Only users with the appropriate access level will have the ability to edit certain survey details.

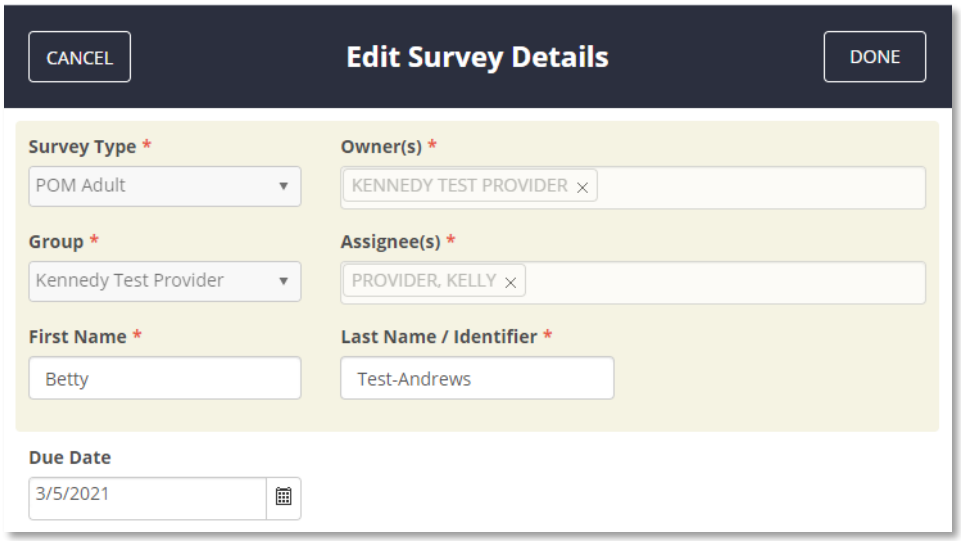
1. Click on the Surveys icon to be taken to the Survey Landing Page to locate the applicable survey.



2. The user will click on the **More** button and select **Edit Survey Details** from the available options.
   Note: A survey must be open before the details can be edited. If it is not open, click "reopen survey" before proceeding with step number two.



3. The **Edit Survey Details** drawer will open, and the user can edit the applicable fields.
   Note: Those fields that are not editable will be grayed out.

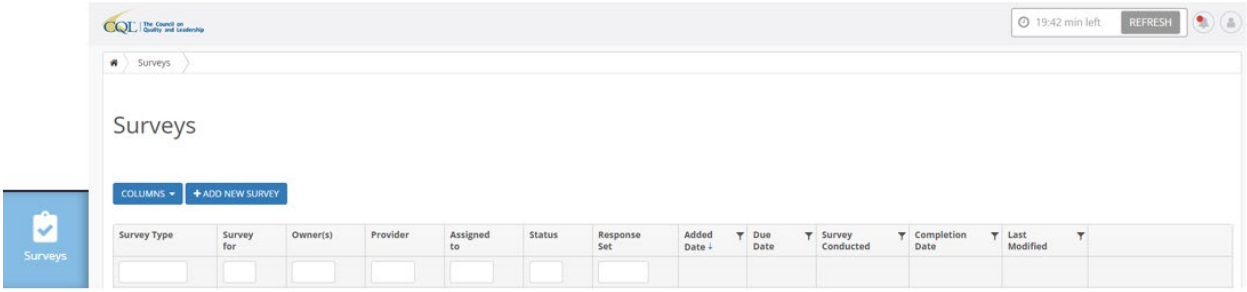


4. Once all edits have been made, click **Done**.

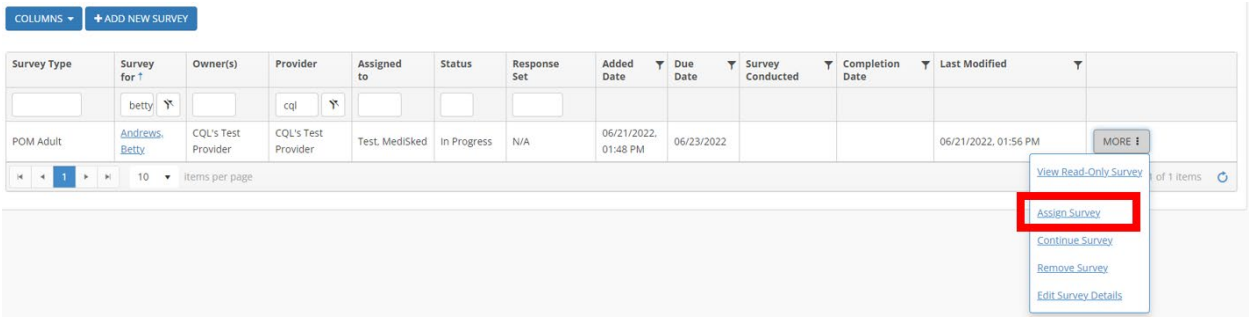
Assign a Survey

If necessary, POM surveys can also 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.

1. Click on the Surveys icon to be taken to the Survey Landing Page to locate the applicable survey.
   Note: Users with the appropriate access to reassign will have visibility to all surveys associated to the Owner(s).



2. 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.



3. 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**.