Department of Health Care Services (DHCS)

Consumer Perception Survey (CPS)
Performance Outcomes & Quality Improvement (POQI)

User Manual – Version 1.0
December 2019

Application Information and User Instructions
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# Chapter 1: Definitions and Abbreviations

## 1 Definitions and Abbreviation

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<td>Consumer perception Survey</td>
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<td>POQI</td>
<td>Performance Outcome &amp; Quality Improvement</td>
</tr>
<tr>
<td>DHCS</td>
<td>Department of Healthcare Services</td>
</tr>
<tr>
<td>MHSA</td>
<td>Mental Health Services Act</td>
</tr>
<tr>
<td>CIBH</td>
<td>California Institute for Behavioral Health Solutions</td>
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Chapter 2: Overview

2 Overview

POQI is a system that employs programs and subsystems to gather information for outcomes of MHSA related services. POQI is paid for by a portion of MHSA i.e. Proposition 63 funds. The CPS gathers data from clients within the last six months or any service they have received so far. The forms provide surveys to rank the quality of services received from a client by an agency. The Consumer Perception Survey uses 4 types of forms:

- Adult (ages 18 – 59)
- Older Adult (ages 60 +)
- Youth Services Survey (age 13-17)
- Youth Survey for families (for parent/caregivers of youth under age 18)

The information gathered within the CPS is used to evaluate and to fine-tune services to ensure the best outcomes for consumers and families.

Figure 1: CPS POQI overview diagram
2.1 For Counties
1. Some counties transmit CPS data to DHCS in MOVEIT.
2. System generates a validation report for county in MOVEIT.
3. If the validation report status is “File finalization after validation and acceptance was successful” then the file is ready to be picked by CIBH in MOVEIT/DHCS/Data Exchange.
4. If the validation report status have an error then correct the error and repeat step 1 and 2.

2.2 For CIBH
5. Some counties transmit CPS data to CIBH.
6. CIBH consolidates all the counties data including the one submitted to them and once picked up from DHCS, merges them to 4 main files (Family, Youth, Adult, and Older Adult), then send them to DHCS in MOVEIT.
7. System generates a validation report to CIBH in MOVEIT.
8. If the validation report is “File finalization after validation and acceptance was successful” then a .CSV file will be generated to MOVEIT/County<ID>/Reports from where counties can pick up their respective file.
Chapter 3: System Requirements

3 System Requirements

Workstations must meet system requirement:

1. Microsoft Window Operating System using Internet Explorer version 11 or later.
2. Minimum 1024 x 768 recommended resolution.
4 CPS POQI flow chart

Start
Log in to Microsoft Azure
Select the MOVEIT app & login
Folders/BHIS/Test/CPS
Select the county
Drop the .DAT file in the submittal folder
CIBH
Counties
Go to DHCS folder
Errors in Validation report
Yes
Make Corrections
No
 County file
File will the send to CIBH to pick up. Path: Folders/BHIS/CPS/DHCS/DataExchange.
CIBH file
System will generate a .csv file for the counties. Path: Folders/BHIS/Test/CPS/<CNYT ID>/Reports

End

Figure 2: CPS POQI flow chart
Chapter 5: Data files for CPS POQI

5 Data files for CPS POQI

1. File submission format.
2. Validation reports.
3. Adding user as a member for the county.
4. Counties will send their data to CIBH.
5. Counties will send their file containing CPS data to DHCS.

5.1 File submission format

Counties and CIBH will follow the same file format to submit their data into MOVEIT.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Type</th>
<th>Column Position</th>
<th>Width</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COUNTID</td>
<td>Text</td>
<td>1-2</td>
<td>2</td>
<td>County identifier i.e. county code.</td>
</tr>
<tr>
<td>CCN</td>
<td>Text</td>
<td>3-11</td>
<td>9</td>
<td>County client number (CSI equivalent)</td>
</tr>
<tr>
<td>FORMTYPE</td>
<td>Text</td>
<td>12-12</td>
<td>1</td>
<td>Age specific</td>
</tr>
<tr>
<td>FORMLANG</td>
<td>Text</td>
<td>13-14</td>
<td>2</td>
<td>Language of instrument</td>
</tr>
<tr>
<td>REASON</td>
<td>Text</td>
<td>15-15</td>
<td>1</td>
<td>If the instrument is not completed, the PRIMARY reason must be indicated.</td>
</tr>
<tr>
<td>SRVYDATE</td>
<td>Text</td>
<td>16-23</td>
<td>8</td>
<td>Date of survey administration. NOTE: This field is returned to counties in the format: yyyyymmdd</td>
</tr>
<tr>
<td>*COUNTY1</td>
<td>Text</td>
<td>24-25</td>
<td>2</td>
<td>County Question #1</td>
</tr>
<tr>
<td>*COUNTY2</td>
<td>Text</td>
<td>26-27</td>
<td>2</td>
<td>County Question #2</td>
</tr>
<tr>
<td>*COUNTY3</td>
<td>Text</td>
<td>28-29</td>
<td>2</td>
<td>County Question #3</td>
</tr>
</tbody>
</table>

5.2 Validation report

Following are the validation report generated:

- Name validation against agreed format, while being case-insensitive.
  - If the file naming convention is followed but instead of CPS (all upper case) we write cps (all lower case) then the system will throw an error.
- Validate file against parent folder
  - If a file belongs to county A and we drop the file in county B then the system will throw above error.
Chapter 5: Data files for CPS POQI

- File name duplication.
- If a file is being submitted and same/other file is submitted with the same name then system will throw the above error.
- Validation associated survey period using the file data.
  If a file is submitted for fall period but the data in the file is for spring period then the system will throw the above error.

- Data duplication validation.
  If a two file are submitted with the same data then system will throw the above error.
- Data count validation.
- Check for eligible re-submission periods.
  If a file is submitted for spring period and same file is re-submitted with a different name but same data then system will throw the above error.

5.3 Adding user as a member for the county

- Once Approver(s) have been made the CPS POQI Security Group Owner(s) for their organization by DHCS, they will have the ability to Add/Edit or Remove staff members for that system.
- To add a staff member, Approver will click on the Group icon listed on the apps screen.

![Figure 3: App screen (How to add users to the group)](image)

- The groups section will show an approver both the groups they are in and the groups they are owners of.
- Click the groups to add staff members.
- Click the plus icon.
Chapter 5: Data files for CPS POQI

A pop up screen will open “Add members”

![Figure 4: Add user to a group](image)

![Figure 5: Search bar for adding users to a group](image)

- A pop up screen will open “Add members”
Chapter 5: Data files for CPS POQI

- The Approver will search the member by name or email address to see if this user is already in Azure. If user is located, then select that user, then select add. If the user is not in Azure, the Approver will select add after entering the user’s email.

![Figure 6: Adding user to the security group](image)

- Once “Add” is selected an invitation will be sent on the email entered.
- Once the user receives the email, the user must select “Get Started”.

![Figure 7: Invitation for user to get access for CPS POQI](image)
Chapter 5: Data files for CPS POQI

- A Microsoft login page will open where the user will enter their password associated with the email provided in the login screen.

![Login screen for user after clicking “Get Started”](image)

*Figure 8: Login screen for user after clicking “Get Started”*

- Once the user has entered the password a pop up screen will open. After reading the terms and conditions the user will click Accept.

![Terms and Condition before user gets access to CPS POQI](image)

*Figure 9: Terms and Condition before user gets access to CPS POQI*
5.5 Deleting a User from a group

- If a user is the member of the group, click the three dots next to the name you want to remove from the group. Then simply select Remove member.

![Figure 10: How to remove a user from a group]

- Click Remove.

![Figure 11: Removing a user from a group]

5.6 Counties sending data to DHCS

Counties will gather all the data for Adult, Older Adult, Youth Services Survey, and Youth Survey for families and will submit them directly to DHCS. Counties will submit data for Adult, Older Adult, Youth Services Survey and Youth Survey records in four separate files.

POQI file name format for counties:
The file naming conventions for the files to be dropped in county folder are:
- CPS_CNTY<CODE>_MMDDYYYY_Adult_Submittal.DAT
- CPS_CNTY<CODE>_MMDDYYYY_OlderAdult_Submittal.DAT
- CPS_CNTY<CODE>_MMDDYYYY_Youth_Submittal.DAT
- CPS_CNTY<CODE>_MMDDYYYY_Family_Submittal.DAT
Chapter 5: Data files for CPS POQI

Step by step instruction for file submissions:

- Login to Azure. LINK: [https://portal.dhcs.ca.gov/](https://portal.dhcs.ca.gov/)

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![Log In](image)

Figure 12: Portal login button

- From the access panel application select File Transfer.

![Apps](image)

Figure 13: MOVEIT icon on app screen
Chapter 5: Data files for CPS POQI

- MOVEIT login page will open. Click “Try Single Sign on with SAML”.

![MOVEIT login page](image)

Figure 14: MOVEIT login page

- Click Folders.
- On the menu bar, select Folders / DHCS-BHIS / Production / CPS / <County ID>

![Path for CPS folder](image)

Figure 15: Path for CPS folder
Chapter 5: Data files for CPS POQI

- Open the submittal folder and drag the .DAT file.

![Figure 16: Path for county submittal folder](image)

- A validation report must be generated in the report folder.

![Figure 17: Validation report generation](image)

- Click the download to download the validation report.
- If the validation report status is “File finalization after validation and acceptance was successful”.

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Chapter 5: Data files for CPS POQI

- Then the file is ready to be picked by the CIBH in MOVEIT/CPS/DHCS/Data Exchange.

![Figure 18: Data Exchange folder from where CIBHS will pick up county files](image)

- If there is an error in the validation report then fix the error and submit the file again.

5.7 Counties sending data to CIBH

Counties will gather all the data for Adult, Older Adult, Youth Services Survey, and Youth Survey for families and will submit them to CIBH. Then CIBH will compiles the data from all counties and sends the data to DHCS. DHCS receives these files and if valid, processes and sends the consumer perception surveys in .csv format to the county’s folders.

POQI file name format for CIBH:
The file naming conventions for the CIBH files to be dropped in DHCS folder are:

- CPS_CIBH_MMDDYYYY_Adult_Submittal.DAT
- CPS_CIBH_MMDDYYYY_OlderAdult_Submittal.DAT
- CPS_CIBH_MMDDYYYY_Youth_Submittal.DAT
- CPS_CIBH_MMDDYYYY_Family_Submittal.DAT
Chapter 5: Data files for CPS POQI

Step by step instructions for file submissions:

1. Login to Azure. LINK: [https://portal.dhcs.ca.gov/](https://portal.dhcs.ca.gov/)
2. Click login

---

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---

*Figure 19: Portal Login button*
Chapter 5: Data files for CPS POQI

- Enter your work email

![Portal login page]

*Figure 20: Portal login page*

- Select MOVEIT.

![MOVEIT icon on the app screen]

*Figure 21: MOVEIT icon on the app screen*
Chapter 5: Data files for CPS POQI

- MOVEIT login page will open. Click “Try Single Sign on with SAML”.

![MOVEIT login page](image)

Figure 22: MOVEIT login page

- Click folders.
- Navigate to path BHIS/Production/CPS/DHCS.

![Path for CIBHS folder](image)

Figure 23: Path for CIBHS folder
Chapter 5: Data files for CPS POQI

- Open the submittal folder by clicking on it.

```
Folders

DHCS-BHIS > PRODUCTION > CPS > DHCS > Submittal
```

*Figure 24: Path for CIBHS submittal folder*

- Now the drag and drop the .DAT file with correct naming convention.
- Go back to the DHCS folder.
- Wait for min or two and refresh the page.
- Open the Reports folder to see the validation report for the dropped.

```
Folders

DHCS-BHIS > PRODUCTION > CPS > DHCS > Reports
```

*Figure 25: Path CIBHS reports folder*

- In the report folder click on the validation report for the file you just dropped.
- It will open a new page with file actions in the header. To view to the validation report click download.
- The validation report should download in notepad. Example below:
- If the file validation status is “File finalization after validation and acceptance was successful” then .CSV file must be generated for each county in their respective folders.

![Folders]

<table>
<thead>
<tr>
<th>Name</th>
<th>Size/Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test County-69_Adult_May2017.csv</td>
<td>3.1 KB</td>
</tr>
<tr>
<td>Test County-69_Adult_November2016.csv</td>
<td>2.6 KB</td>
</tr>
</tbody>
</table>

*Figure 26: csv file location*

- .CSV file will be located in each counties in their report folder.