LOS ANGELES COUNTY
DEPARTMENT OF MENTAL HEALTH
hope. recovery. wellbeing.

Consumer Perception Survey (CPS)

Application User Guide

v2021.1.0

May 25, 2021

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Purpose

The California Department of Health Services utilizes Consumer Perception Surveys (CPS) to collect data for the federal National Outcome Measures required by the Substance Abuse and Mental Health Services Administration. As recipients of the federal Community Mental Health Services Block grant, the County of Los Angeles – Department of Mental Health (DMH) must administer CPS in our outpatient programs, at least annually. Historically, the assigned survey periods occur for one week in Spring (May or June) and another week during Fall (November). As the largest and linguistically diverse county mental health plan in the nation, the department has seen CPS return rates in the ten to fifteen thousand range. With these numbers, the disadvantages associated with paper-based survey administration outweighed the advantages.

As a resource tool for DMH outpatient providers from directly operated and contracted programs, the CPS User Portal would significantly cut the cost, labor, and human errors associated with managing paper-based surveys. In the outpatient programs, CPS Portal Users will use the application to email or text CPS forms to clients and their families in their preferred languages (English, Arabic, Spanish, Persian, Filipino, Korean, Russian, Vietnamese, Khmer, Chinese Simplified and Chinese Traditional). The electronic version of CPS that providers send uses logic branches/skip logic according to the clients and their families' responses. The survey type (Youth, Families, Adult, or Older Adult) will automatically match the clients' age. CPS Portal Users in Administrative roles, such as DMH Quality Improvement, will use the Dynamics version of the application to manage provider participation and track trends in survey return rates by survey type, language, and Service Area.
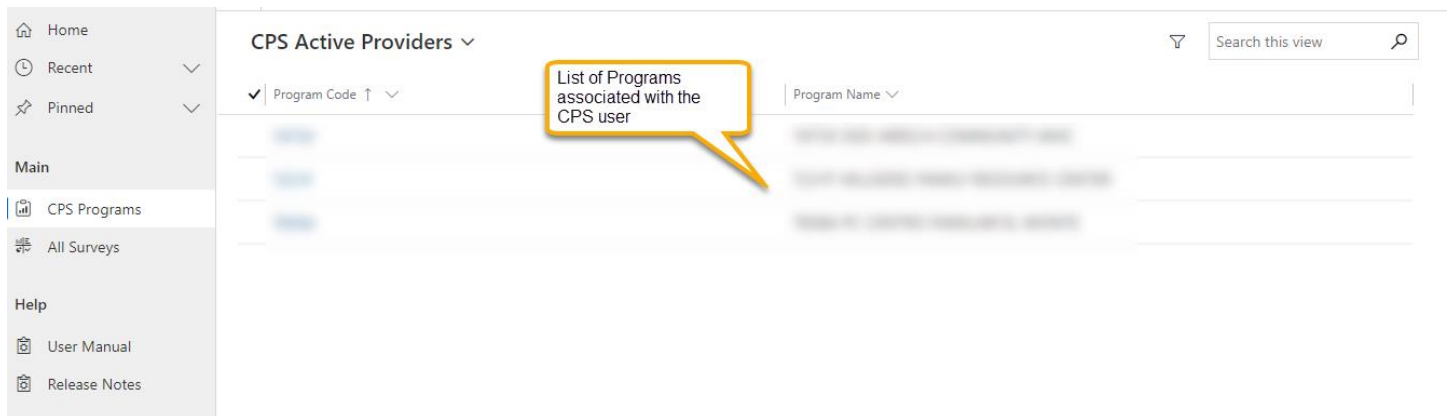
Accessing the Application

To access CPS Dynamics Application, copy and paste the below URL into your internet browser. The recommended browsers are Google Chrome and Microsoft Edge.

https://lacdmhprod20.crm9.dynamics.com/apps/cps

CPS Landing Page

After successful log in to CPS Application, you will see a list of Programs associated with your Log In.

Click on the Program you want to select for the next survey.

By default, the view has recently created surveys on top. The survey list can be sorted by ascending or descending order based on the values in any column. In addition, you can select one of the filtering options under "Filter by".

CPS Subarea

✔	Name ⌄	Survey Status ⌄	Survey Recipient ⌄	Comment? ⌄
		↑ Sort A to Z	Client	No
		↓ Sort Z to A	Both	No
		▽ Filter by	Client	No
		Sent	Both	No

1 - 4 of 34 (0 selected)

How to create and send new Consumer Perception Survey

| 🔲 CPS Programs |
| ⚖ All Surveys |
| **Help** |
| 🔲 User Manual |
| 🔲 Release Notes |

🔒 Provider Name

Click on "+ New Survey Client" ①

CPS Subarea

＋ New Survey Client   ✏ Add Existi

✔	Name ⌄	Survey Status ⌄	Survey Recipient ⌄	Comment? ⌄	Age in Years ⌄	Survey Date ⌄	Created On ↓ ⌄
		Sent	Client	No			
		Sent	Both	No			
		Not Sent	Client	No			
		Sent	Both	No			

1 - 4 of 34 (0 selected)

New Survey Client

General   Time Line

Type Client name or IBHIS ID and select the Client from the list ②

Client Information

| Client | * | john doe | 🔍 |

sClients

🔒 Client Last Name	👤
🔒 Client First Name	👤
Survey Recipient	👤
🔒 Date of Birth	👤

🔒 Client Last Name **JOHN**

🔒 Client First Name **DOE**

Survey Recipient

Client

Select Survey recipient or leave the default value ③

--Select--
Client
Caregiver
Both

🔒 Date of Birth

🔒 Age in Years 83

Fill in "Send survey to Client" section ④

Send Survey To Client:

🔒 Name **JOHN M DOE**

Delivery Preference * **Email**

Client Survey * 🌐 **CPES - Older Adult Survey Spring 2021**

Client Language * 🔲 **English**

Email Address * **Test@email.com**

If applicable fill in "Survey to Caregiver" section **5**

Send Survey To Caregiver:

Caregiver Last Name	*	John
Caregiver First Name	*	Caregiver
Caregiver Survey Delivery Preference	*	Cell
Caregiver Survey	*	CPES - Youth Services Survey for Family Spring 2021
Caregiver Language	*	Chinese Traditional
Caregiver Cell Phone Number	*	123-555-4567

Confirm correct survey template is selected. **Update if needed to Youth Services Survey**
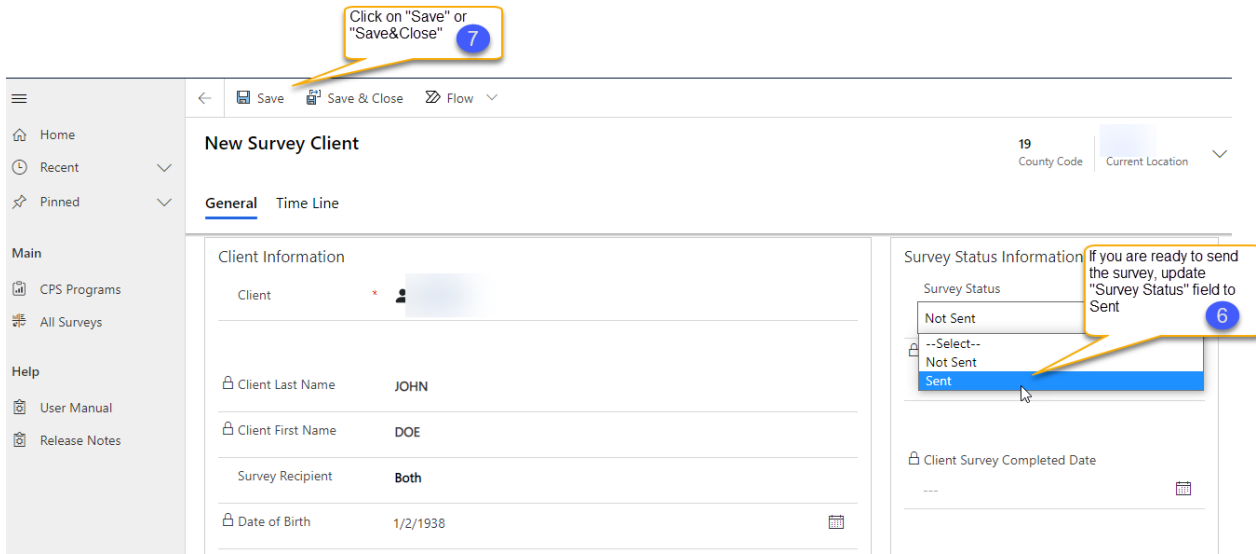
TIPS:

Client Language * English ✕

sLanguages

Arabic
8/6/2020 9:04 AM

Chinese Simplified
8/6/2020 9:04 AM

Chinese Traditional

Click on the magnifying glass to see the full list of survey languages

Click here for more details on Delivery Preference options

Survey will be sent to the Client and/or Caregiver via the preferred delivery method.
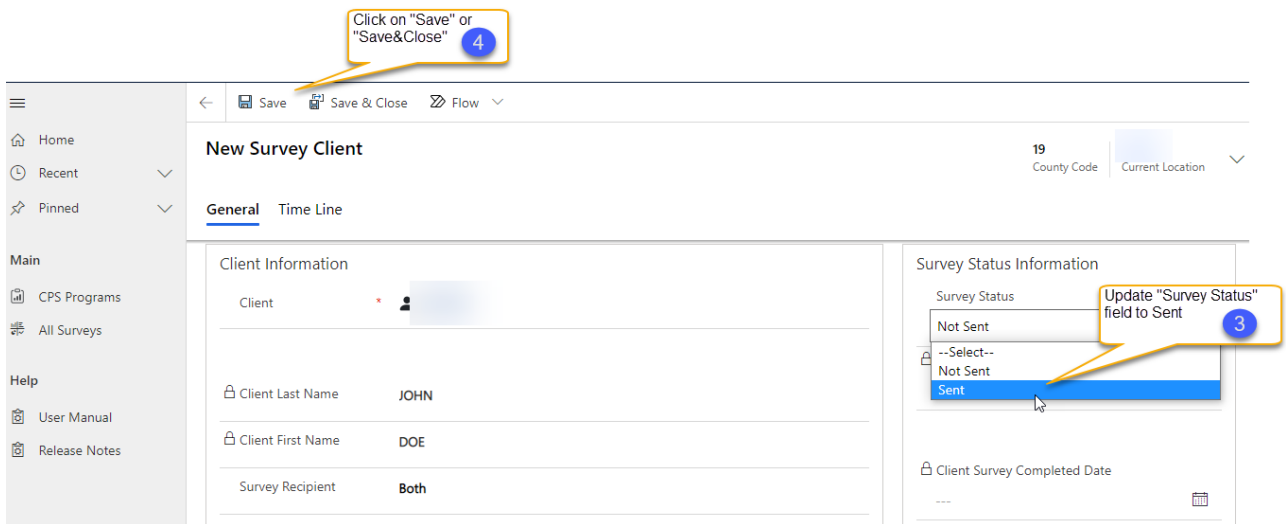
If you would like to save the survey as a DRAFT and send it later, in step 6 leave the survey status "Not Sent" and click "Save" or ""Save & Close".

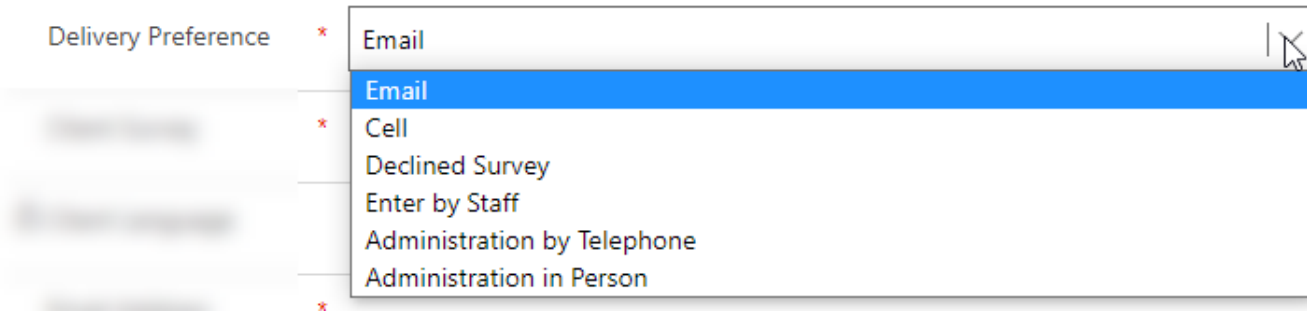## How to send Survey that was saved as a *Draft*

Survey Delivery Preference options
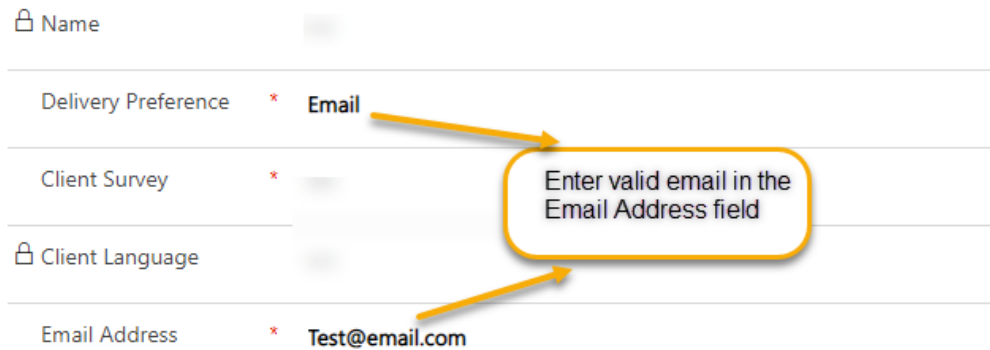
In the Client or Caregiver Delivery Preference field, you can select one of the below options:

Delivery Preference	*	Email	⌄ ⇖
		Email	
	*	Cell	
		Declined Survey	
		Enter by Staff	
	*	Administration by Telephone	
		Administration in Person	

1. **Email – To send the survey to the Client or Caregiver via Email, select "Email" from the Delivery Preference drop-down and enter valid email in the Email Address field**
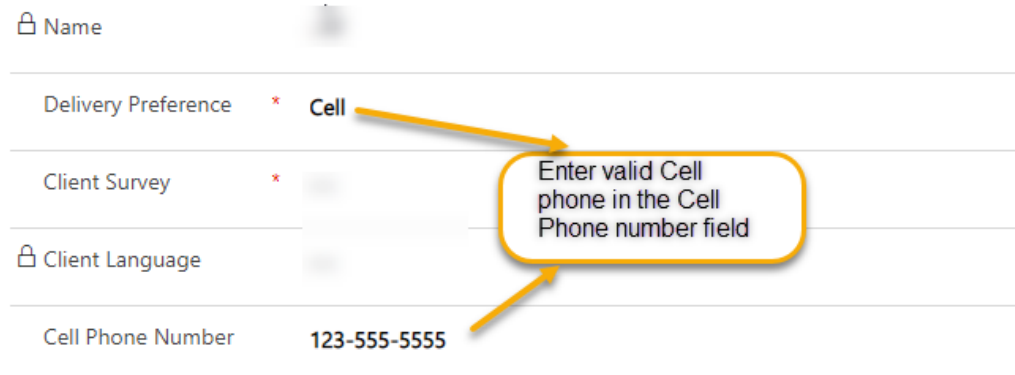
Send Survey To Client:

🔒 Name		
Delivery Preference	*	**Email**
Client Survey	*	
🔒 Client Language		
Email Address	*	Test@email.com

> Enter valid email in the Email Address field

2. **Text message - To send the survey link to the Client or Caregiver in a text message, select "Cell" from the Delivery Preference drop-down and enter valid cell phone number in the Cell Phone Number field**
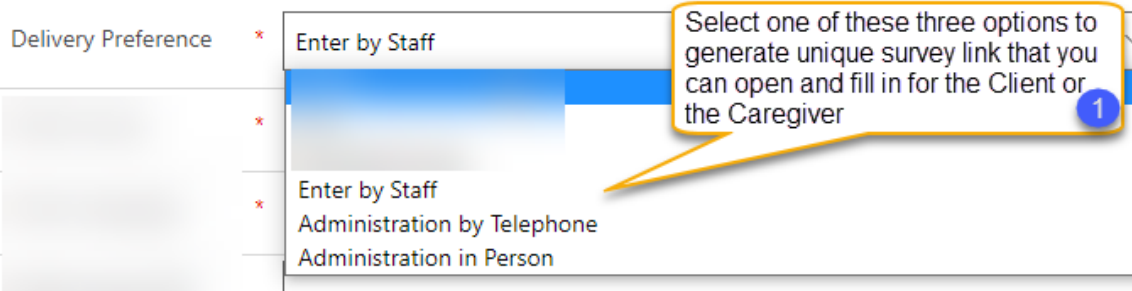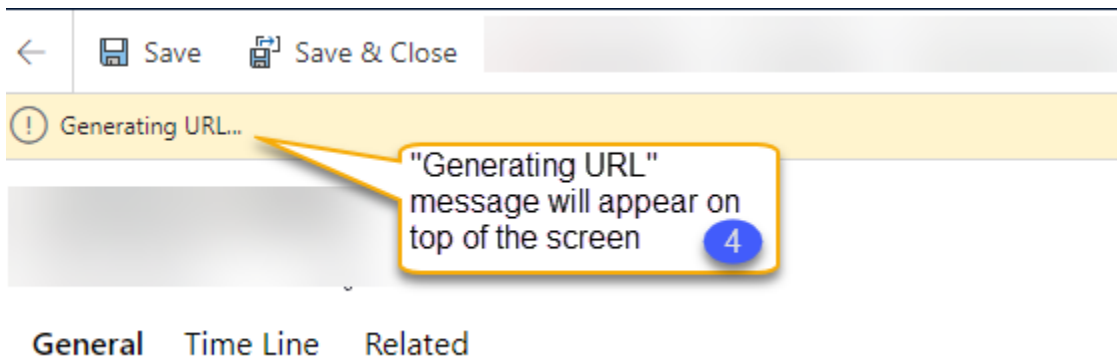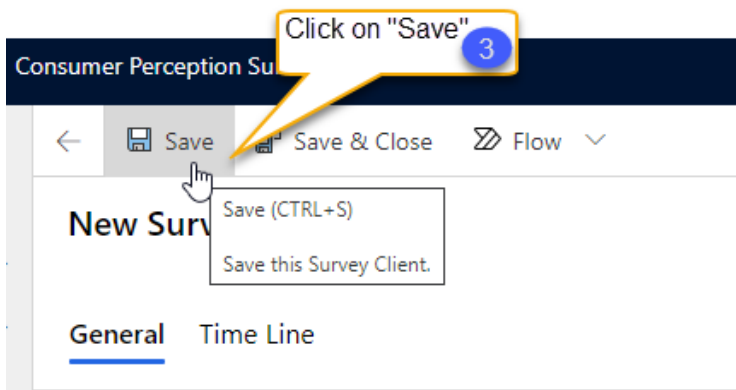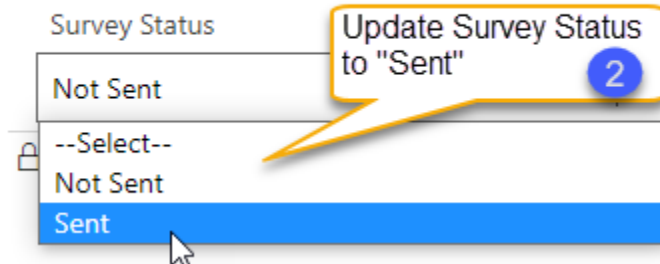
Send Survey To Client:

🔒 Name		
Delivery Preference	*	**Cell**
Client Survey	*	
🔒 Client Language		
Cell Phone Number		123-555-5555

> Enter valid Cell phone in the Cell Phone number field

3. **Generate unique link for the survey** – When you select "Enter by Staff", "Administration by Telephone", or "Administration in Person" the system will generate unique link to the survey. Copy and paste the link from the survey URL field into a new browser window to fill in the survey on behalf of the Client or Caregiver.

Delivery Preference * Enter by Staff

Select one of these three options to generate unique survey link that you can open and fill in for the Client or the Caregiver **1**

Enter by Staff
Administration by Telephone
Administration in Person

Survey Status Information

Survey Status

Update Survey Status to "Sent" **2**

Not Sent

--Select--
Not Sent
Sent

Click on "Save" **3**

Consumer Perception Su...

← 🖫 Save 🖫 Save & Close ⧄ Flow ⌄

New Surv...

Save (CTRL+S)
Save this Survey Client.

General   Time Line

← 🖫 Save 🖫 Save & Close

⓵ Generating URL...

"Generating URL" message will appear on top of the screen **4**

General   Time Line   Related

When this pop-up comes up, click OK **5**

lacdmhdev2.crm9.dynamics.com says

Click the link below to access the survey.

OK

Send Survey To Client:

🔒 Name

Delivery Preference   *   **Enter by Staff**

🔒 Client Survey   *   📋 CPES - Adult Survey Spring 2021

🔒 Client Language   *   🔣 English

🔒 Client Survey URL   https://bit.ly/3tUYDVe

The unique link will be in the Client/Caregiver Survey URL field. Click the icon to open or copy/paste the link to a new browser tab **6**

How to enter Survey declined by the Client and/or the Caregiver

If Client or Caregiver declined to participate in the Survey, select "Declined Survey" in Delivery Preference field.

Send Survey To Client:

🔒 Name

Delivery Preference   *   **Declined Survey**

Decline Survey   *   --Select--

--Select--
Refuse
Impaired
Language
Other

Active

Select "Declined Survey" in Delivery Preference field. Enter the reason client or caregiver declined the survey.

How to review Client and/or Caregiver Comments

+ New Survey Client :

✔	Name ∨		...ey Recipient ∨	Client Deliv... ∨	Caregiver D... ∨	Comment? ∨	Age in Years ∨	Survey Date ∨	Create... ↓ ∨
		...ient				No	86	5/13/2021	5/13/2021 ...
		Sent	Both		...tra...	No	15	---	5/13/2021 ...
		Sent	Both	Cell	Email	Yes	29	5/13/2021	5/13/2021 ...
		Sent	Both	Cell	Cell	Yes	59	5/13/2021	5/13/2021 ...

Click the Client Name to open the Survey Details ②

Look for records that have "Yes" in the "Comment" field ①

Send Survey To Client:

🔒 Name

🔒 Delivery Preference

🔒 Client Survey

🔒 Client Language

🔒 Cell Phone Number 📞

On the Survey Details page look for Client Comment and Caregiver Comment fields.
**The field will be hidden if no Comments were left ③

Send Survey To Caregiver

🔒 Caregiver Last Name *

🔒 Caregiver First Name *

🔒 Caregiver Survey *
Delivery Preference

Survey Comment

🔒 Client Comment

Please provide comments here. We are interested in both positive and negative feedback. Also, if there are areas which were not covered by this questionnaire which you feel should have been, please write them here. Thank you for your time and cooperation in completing this questionnaire. : Comment 2
Who helped you with completing any part of this survey? : Comment 1

🔒 Caregiver Comment

What has been the most helpful thing about the services you and your child received over the last 6 months? : Comment 1
What would improve the services here? : Comment 2
Please provide comments here. We are interested in both positive and negative