IDEAL CLINIC PROGRAMME

Training module IV part II for Ideal Clinic software

CAPTURE DATA ON THE OFFLINE SOFTWARE

APRIL 2016





Department: Health REPUBLIC OF SOUTH AFRICA

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1.Install Offline application

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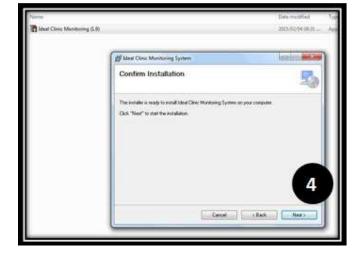
Documents library Terme Mark Check Montening (Lill Medicanes to Kinetical System Medicanes to Kinetical System Medicanes to Kinetical Check Montening System Med You can get the installation file for the Offline software from someone else on a CD or memory stick. In this case you will double click on the file to start installation

 However, the Offline software is also available for download from the online software. You click on 'Data Management' and then 'Download Offline Application' and run (double click on the file) the installation file to start installation

 This Window will come up next; click the 'Next' button

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3. Leave all settings as it is and click Next



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4. Click Next

5. This will start the installation of the Offline Application on your computer

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7 Deal Clinic Monitoring System 6. Once installation completed; click Close

 Close all windows and go to the Desktop on your computer where you will find the shortcut for the Offline Ideal Clinic Monitoring System

2. Capture Offline

File Help System Setup

dmin PIN: ****

Select Facility Province

District

Ward

Facility

Sub District

urrent Facility: JB Marks CHC

Eastern Cape

O Tambo DM

King Dalindyebo SD

Unknown Ward

Bazya CHC



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 Go to the Desktop on your computer and Click on the Offline 'Ideal Clinic Monitoring System' Icon to open the Offline program

 A Window will open (Setup screen) that requires an Admin Pin. Enter **1234** at the admin pin

V Ideal Clinic Mr	initioning 2,20.0.0	-		= 0 ×
File Help	and any second			(Constitution of Constitution
System Setup				
Current Facility: D	e Beenhoogte		_	
Admin PIN: ""1				
Select Facility				
Province	Gauteng	•	3	
District	Tahwane MM	•		
Sub District	Tshwane 6 SD	•]		
Ward	Unknown Ward	•		
Facility	Eenteruit CHC	•		
				4

- 3. When you enter the Pin, this Window will appear. You can now filter Province, District, Ward and Facility
- 4. At bottom right hand corner is a button 'Apply'; CLICK Apply



5. A message will appear that facility set up is updated

- The next screen will appear, this is the 'Home' screen. Note that the facility chosen upon the setup will be displayed
- Click on new assessment and your form will appear for capturing.

CDC

Ideal Clinic Monitoring 2.22.0.0			
File Help			
Hide Navigation Close	Submit Save		
Facility: Nieuveldpark	8	9	
[0 / 8] Administration Signage and Notic		Status Determination Role:	Clinic Staff met during Visit
[0 / 2] Administration Staff identity and d [0 / 4] Administration Client service orga		SD Facility Manager 🔹	
[0 / 9] Administration Management of cli		oo raang manga	
[0 / 10] Integrated Clinical Services Mar			
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[0 / 12] Pharmaceuticals and Laboratory	10		
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[0 / 7] Human Resources for Heath Pro [0 / 10] Human Resources for Heath Av			
[0 / 5] Support Services Finance and su			
[0 / 15] Support Services Hygiene and C	00 Marcii 2010		
[0 / 8] Support Services Security			
[0 / 5] Support Services Disaster prepar			
[0 / 5] Infrastructure Physical Space and			

- 8. Complete the date that the Status Determination was conducted
- 9. Select by whom the Status Determination was conducted by selecting the Status Determination Role
- 10. Also complete the remainder of the information at the top part of the form, i.e Assessors, clinic staff met during visits, date of previous visit, changes implemented, telephone number

Component	Sub Co	mponent		816					
1) Administration	1) Sign	age and Notices							
Ideal Clinic Dashboard Reference The Ideal Functioning Clinic has	,	Method for Measurement	Weighting	Responsibility	Yes	No	Partial	Current Challenges to reach the Ideal	Checklist
1) External signage to the facility are visibly posta nearest main roads up to the facility entrance	d from the	٢	1	1	0	0	0	13	
2) Display board reflecting the facility name, serv physical address, contact details and service pac is visible at the entrance of the facility	ce hours, kage details	:		D	0	0	0	12	
3) The NO WEAPONS, NO SMOKING, NO ANII (except for service animals) and NO HAVIWERS slearly sign posted at the entrance of the facility				D	0	0	0		

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	Component	1173	-		1	-	-	1

- Select the score for each element by clicking on the radio button.
- 12. The elements that are scored against a checklist are marked with an icon to the right of the screen. Note that you will not be able to select the 'Yes', 'No' and 'Partial' on the dashboard as the options are blocked. Select the icon to the right of the element that will then open the checklist.
- If you have selected a Partial score, it is mandatory to write a comment in the 'Current Challenges column', else you will not be able to submit the status determination.
- 14. The red margin/exclamation mark to the right of the pages will disappear once a comment is captured
- 15. After having captured the data, the form can be saved and you can continue at a later stage. When you click on 'Save' you will get a message that will say 'Assessment has been saved' Click 'OK' and then click on 'Close' to close the form
- 16. There is a navigation pane on the left-hand side that can be used to navigate to the different components and sub components in the dashboard
- 17. To hide the Navigation pane, select 'Hide Navigation'

File Help	Department: Health REPUBLIC O	h DF SOUTH AF		8
Facility:		ourg Clinic	Date Last Saved	En situ:
	ation Date			Facility
2016/02/24		Saved	2016/02/24 09:58 PM	Murraysburg Clinic
2015/10/21		Saved	2015/10/21 11:42 AM	Itekeng Clinic
2015/09/24		Saved	2015/10/05 09:05 AM	Opkoms
2015/09/21		Saved	2015/09/21 10:13 AM	Ladam Irene Clinic
2015/09/21		Saved	2015/09/21 10:12 AM	Afsondering
2015/09/15		Submitted	2015/09/19 08:06 PM	Eersterust CHC
2015/09/11		Saved	2015/09/08 12:59 PM	Cinci Clinic
2015/09/03		Saved	2015/09/08 12:56 PM	Nhlabane Clinic
2015/08/04		Saved	2015/10/01 11:16 AM	Gardens
2015/07/14		Saved	2015/07/14 11:33 AM	Nhlabane Clinic
2015/05/07		Submitted	2015/05/07 10:47 PM	Philani Clinic

 To re-open the saved status determination, go to the 'File' tab and select 'Home'.
 Double click on the name of the facility to open the form.



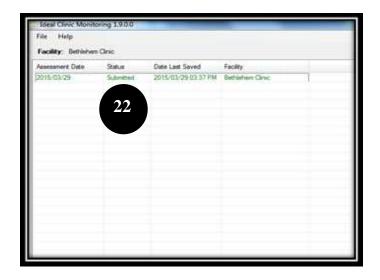
19. Once all information is correct and the form is complete then you can submit the form by clicking on 'Submit'



20. The following message will appear



21. Click Yes; and the following message will appear



22. After you have closed the form that was submitted, you will see this Window.

Note that the status has now changed to Submitted.

Remember that this form is now submitted and still in the Offline Program on your computer. You still need to export it from your computer to the Online Ideal Clinic Monitoring System

3. Capture for multiple faclities

Setup			
	1		
About	t		
Facility: Nieuvel	C OF SOUTH A	FRICA	
Status Determination Date	Status	Date Last Saved	Facility
2016/03/01	Saved	2016/03/01 09:59 PM	Nieuveldpark
	0		
2016/02/24	Saved	2016/02/24 09:58 PM	Murraysburg Clinic
	Saved	2016/02/24 09:58 PM 2015/10/21 11:42 AM	Murraysburg Clinic Itekeng Clinic
2015/10/21			the second s
2015/10/21 2015/09/24	Saved	2015/10/21 11:42 AM	Itekeng Clinic
2015/10/21 2015/09/24 2015/09/21	Saved Saved	2015/10/21 11:42 AM 2015/10/05 09:05 AM	Itekeng Clinic Opkoms
2015/10/21 2015/09/24 2015/09/21 2015/09/21	Saved Saved Saved	2015/10/21 11:42 AM 2015/10/05 09:05 AM 2015/09/21 10:13 AM	Itekeng Clinic Opkoms Ladam Irene Clinic
2015/10/21 2015/09/24 2015/09/21 2015/09/21 2015/09/15	Saved Saved Saved Saved	2015/10/21 11:42 AM 2015/10/05 09:05 AM 2015/09/21 10:13 AM 2015/09/21 10:12 AM	Itekeng Clinic Opkoms Ladam Irene Clinic Afsondering
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2015/02/24 2015/10/21 2015/09/24 2015/09/21 2015/09/21 2015/09/15 2015/09/15 2015/09/03 2015/08/04 2015/08/04	Saved Saved Saved Saved Saved Submitted Saved Saved	2015/10/21 11:42 AM 2015/10/05 09:05 AM 2015/09/21 10:13 AM 2015/09/21 10:12 AM 2015/09/19 08:06 PM 2015/09/08 12:55 PM 2015/09/08 12:56 PM	Itekeng Clinic Opkoms Ladam Irene Clin Afsondering Eersterust CHC Cinci Clinic Nhlabane Clinic

File Help	
System Setup	
Current Facility: Nieuveldpark	
Admin PIN: 2	
Select Facility	
Province	*
District	*
Sub District	*
Ward	
Facility	
	876

File Help System Setup		
Current Facility:	Nieuveldpark	
Admin PIN:		
Select Facility		
Province	Western Cape 3	•
District	Central Karoo DM	•]
Sub District	Beaufort West LM	•]
Ward	Unknown Ward	•]
Facility	Nieuveldpark	•

- The Offline module can be used to capture multiple facilities, especially in those areas where the network connectivity is not good, subdistrict/district offices can use the Offline module to capture Status Determinations for all the facilities within their subdistrict/ district. To capture a different facility after the initial setup was done, go to the 'Help' tab and select 'Setup'
- 2. The following screen will appear. Type in again the generic pin '1234' in the box for 'Admin PIN'

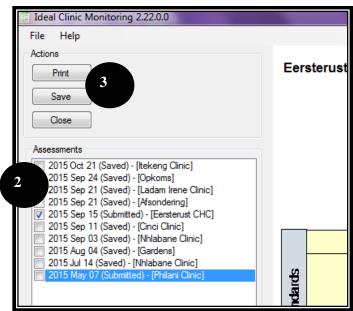
 The list of facilities will appear, select the applicable facility and follow steps 5 to 7 on page 6 to capture data for the new facilities that was setup

4. Report generation

ile	Help	1		
	Home			
	Clinic Report			
	Quality Improvement	Plan		
	Export Data	H A	FRICA	
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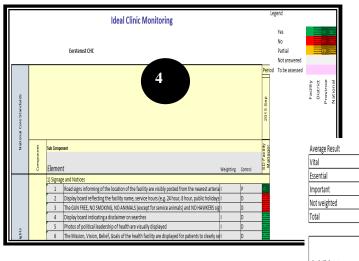
 The reporting section of the offline module is found on the 'File' tab. The **Clinic Report**, and

Quality Improvement Plan can be accessed from this tab

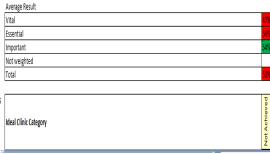


Select the **Clinic Report** from the 'file' tab as showed in point 1.

- 2. On the left side all the status determination that were captured are displayed. Click on the tick box next to the facility that you want to generate a report for.
 - 3. Select the 'Print' or 'Save' button. If you select 'Save' you will be prompted where you want to save the file. Select the appropriate location in your document folder.



4. If you select 'Print' the report will open in Excel. Select the print option to print the file. The score obtained will be displayed at the bottom of the page



File Help Actions		
Print Save Close	Quality Improv Itekeng Clinic 21 October 2015	vement Plan
Assessments 2015 Oct 21 (Saved) - [telkeng Clinic]	Component	Sub Compo
2015 Sep 24 (Saved) - [Opkoms] 2015 Sep 21 (Saved) - [Ladam lene Clinic] 2015 Sep 21 (Saved) - [Arsondering] 2015 Sep 15 (Submitted) - [Eneratenat CHC] 2015 Sep 11 (Saved) - [Chroi Clinic] 2015 Sep 03 (Saved) - [Nhilabane Clinic] 2015 Jul 14 (Saved) - [Nhilabane Clinic] 2015 Jul 14 (Saved) - [Philani Clinic]		
	Administration	Signage and

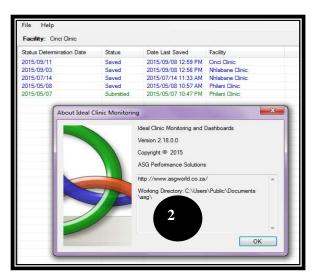
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Manholder Tomotoni	and Medicines and Duppings	Organizes nam lengendure agen.	 I 						

Select the **Quality Improvement Report** from the 'file' tab as showed in point 14.

- 5. On the left side all the status determination that were captured are displayed. Click on the SD that you want to generate a report for.
- 6. Select the 'Print' or 'Save' button. If you select 'Save' you will be prompted where you want to save the file. Select the appropriate location in your document folder.
- 7. If you select 'Print' the report will open in Excel. Select the print option to print the file

5. Deleting 'Submitted' files from the Offline module

Setup			
About	ti 1		
Facility: Nieuvel	OF SOUTH A	FRICA	
Status Determination Date	Status	Date Last Saved	Facility
2016/03/01	Saved	2016/03/01 09:59 PM	Nieuveldpark
2016/02/24	Saved	2016/02/24 09:58 PM	Murraysburg Clinic
	Saved	2015/10/21 11:42 AM	Itekeng Clinic
2015/10/21			
2015/10/21 2015/09/24	Saved	2015/10/05 09:05 AM	Opkoms
	Saved Saved	2015/10/05 09:05 AM 2015/09/21 10:13 AM	Opkoms Ladam Irene Clinic
2015/09/24 2015/09/21			
2015/09/24	Saved	2015/09/21 10:13 AM	Ladam Irene Clinic
2015/09/24 2015/09/21 2015/09/21 2015/09/15	Saved Saved	2015/09/21 10:13 AM 2015/09/21 10:12 AM	Ladam Irene Clinic Afsondering
2015/09/24 2015/09/21 2015/09/21 2015/09/15 2015/09/11	Saved Saved Submitted	2015/09/21 10:13 AM 2015/09/21 10:12 AM 2015/09/19 08:06 PM	Ladam Irene Clinic Afsondering Eersterust CHC
2015/09/24 2015/09/21 2015/09/21 2015/09/15 2015/09/11 2015/09/03	Saved Saved Submitted Saved	2015/09/21 10:13 AM 2015/09/21 10:12 AM 2015/09/19 08:06 PM 2015/09/08 12:59 PM	Ladam Irene Clinic Afsondering Eersterust CHC Cinci Clinic
2015/09/24 2015/09/21 2015/09/21	Saved Saved Submitted Saved Saved	2015/09/21 10:13 AM 2015/09/21 10:12 AM 2015/09/19 08:06 PM 2015/09/08 12:59 PM 2015/09/08 12:56 PM	Ladam Irene Clinic Afsondering Eersterust CHC Cinci Clinic Nhlabane Clinic



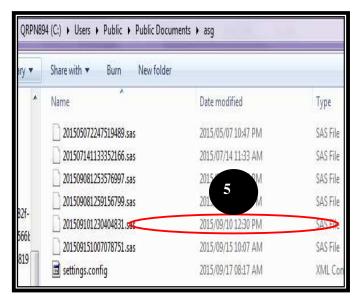


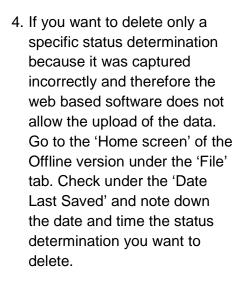
1. Select the 'Help' tab and then 'About'

 The following pop up box will appear. Note down in which file directory the files are stored as indicated under 'Working Directory' e.g C:\User\Public\ Documents\asg\

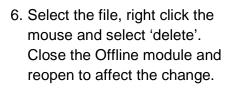
 Go to the file directory as indicated on the 'About' tab and select all the files. Right click the mouse and select 'Delete' from the popup menu.

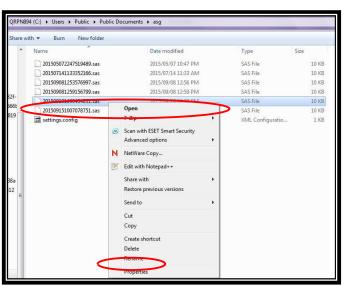
Ideal Clinic Monitoring 2. File Help	20.0.0	-	
Facility: Ambergate Clinic			
Status Determination Date	Status	Date Last Saved	Eneility
2015/09/15	Saved	2015/09/15 10:07 AI	4 CHC
2015/09/11	Saved	2015/09/08 12:59 PM	cinci cinic
2015/09/10	Saved	2015/09/10 12:30 PM	Longlands
2015/09/03	Saved	2015/09/08 12:56 PM	Nhlabane Clinic
2015/07/14	Saved	2015/07/14 11:33 AM	Nhlabane Clinic
2015/05/07	Submitted	2015/05/07 10:47 PM	Philani Clinic





5. For example, if you want to delete Longlands; note down the time and date that it was last saved, see step 4 (12:30 on 2015/09/10). Then go to the file directory where the status determination was saved as explained in section 2 and look up the date and time last saved as noted down.





6. Export and Upload Online

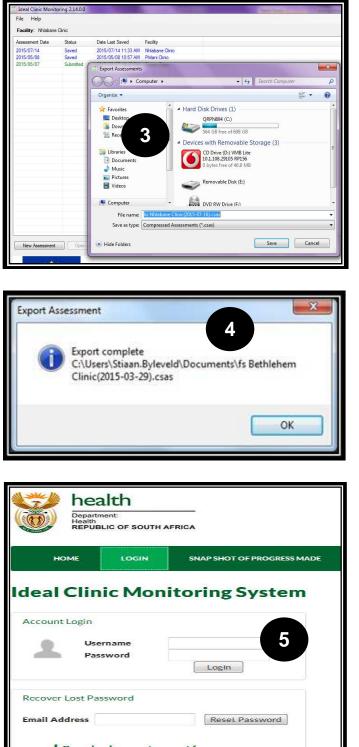


 Go to the Desktop on your computer and Click on the Offline 'Ideal Clinic Monitoring System' Icon to open the Offline program

ile	Help Home		2	
	Clinic Report Quality Improvement Plan Export Data Exit	late Last Saved 015/07/14 11:33 AM 015/05/08 10:57 AM 015/05/07 10:47 PM	racility Nhlabane Clinic Philani Clinic	

2. Go to the 'File' tab and select 'Export Data'. Very import: before exporting, check under the status column that all the assessments show "**Submitted**". Assessments that have a "saved" status will not show on the reports and dashboards once the file have been uploaded on the online software.

Assessment Date	Status
2015/07/14	Saved
2015/05/08	Saved
2015/05/07	Submitted



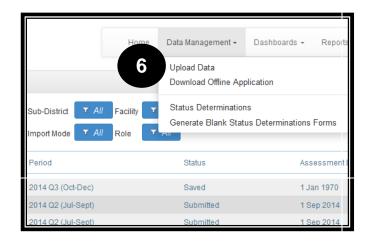
3. A screen will appear to prompt you where you want to save the exported file. Save it under your Document folder or on the memory stick that was provided for this purpose. Please don't change the type. For uploads a *.csas file format is needed. Also note that if assessments were capture for different clinics the file will be named with one of the names of the clinics although the file will contain all the data for all the various clinics that were captured.

- A Message will come up to say 4. that the Export was successful

Go to www.idealclinic.co.za

You have to be registered and need a Username and Password. See the Training module name' Introduction to Ideal Clinic Software' Section 4, page 8 for instructions on how to Register or **Reset Your Password**

5. Enter you Username and Password and click Login to open





 6. Once the Hope page opens, click on the dropdown arrow next to the Data Management tab.

Select 'Upload Data' to import the file

- 7. Click on 'Choose File'
- 8. Browse to find the Export File (*.csas file format) that you have saved on your computer or on a memory stick

9. Click 'Upload' to access the interface that will display the data that you are about to upload.

Instructions: Select a single file (CSAS) or a	71D al made / PEAD Class					
Maximum file size: 10MB	zar ormany soono mea.	1	2			
The following files within the i	exports were ignored:					
		inic(2015-09-07).CSAS. You do	not have the required ro	le to upload st	atus determination role	SD PPTICRM
The following facility assessm	rents have been loaded.					10
Facility	Visit Date	Period	Saved/Committed	Mode	Answers Uploaded	10
Qinelani Clinic	8 Jul 2015	2015 H1 (Apr - Sept)	Committed	Update	212	
Ntembisweni Clinic	24 Aug 2015	2015 H1 (Apr - Sept)	Committed	Update	212	
Bas	wse					(11
bro	wse					

- 10. A screen will appear, indicating which information will be uploaded, i.e, name of facility, visit date, period, status, number of elements captured and Status Determination role.
- Verify that this is the information that you want to upload and select 'Upload' to upload the data
- 12. In cases where you want to upload data that you do not have permission to upload (permissions are assigned to user accounts on the Online software) the following message will appear 'The following files within the exports were ignored'. A list of the files will also be displayed

Assessment Upload						
Instructions: Select a single file (.CSAS) or a Z Maximum file size: 10MB	P of many .CSAS files,	13				
The following facility assessme	nts have been loaded:					
Facility	Visit Date	Period	Saved/Committed	Mode	Answers Uploaded	Answers failed to load
Philani Clinic	7 May 2015	2015 H1 (Apr - Sept)	Committed	Update	212	
Browse. No file selected.						
						Close
PEALTH SYSTEMS TRUST						powered b

13. A message will appear 'The following facility assessments has been loaded' once the files have been uploaded.