

IDEAL CLINIC PROGRAMME

Training module IV part II for Ideal Clinic software

CAPTURE DATA ON THE OFFLINE SOFTWARE

APRIL 2016



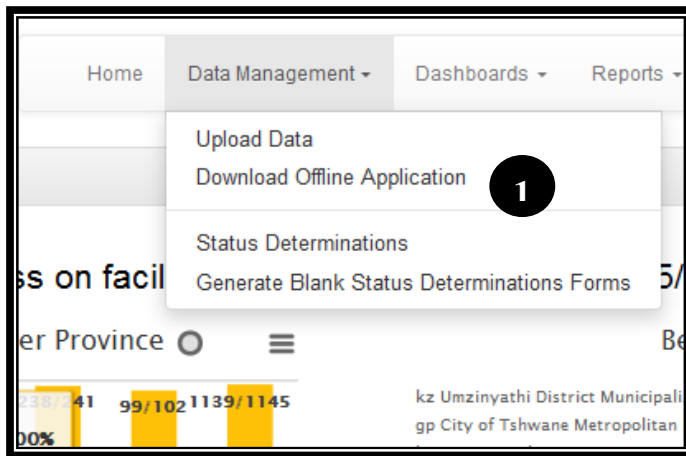
health

Department:
Health
REPUBLIC OF SOUTH AFRICA

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1. Install Offline application



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

1. 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



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



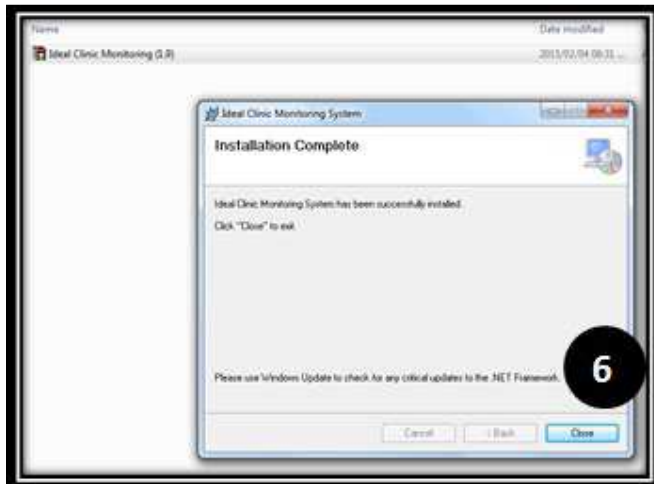
3. Leave all settings as it is and click Next



4. Click Next



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



6. Once installation completed; click Close



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

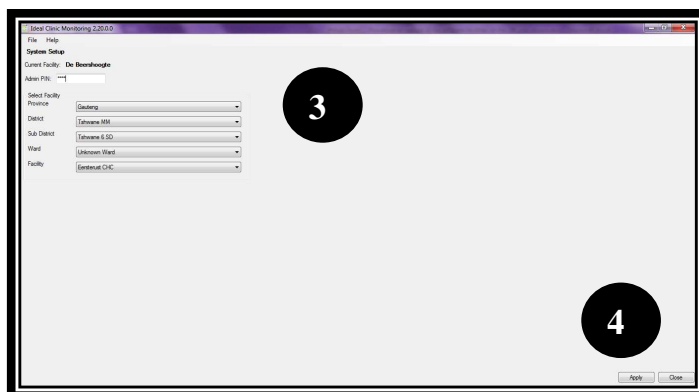
2. Capture Offline



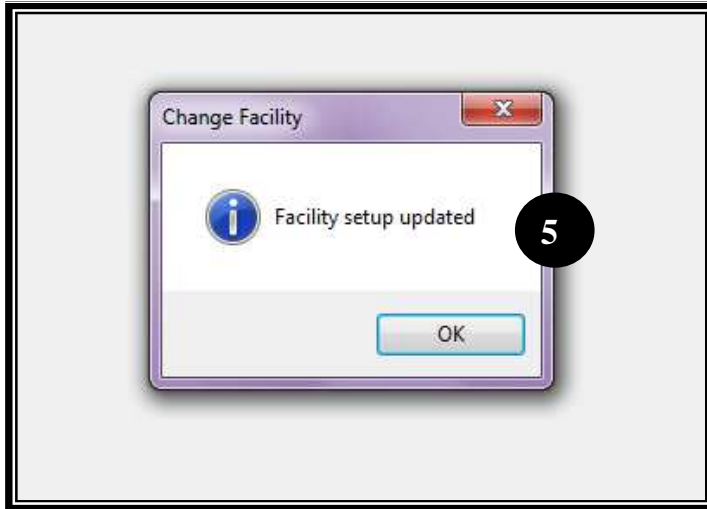
1. Go to the Desktop on your computer and Click on the Offline 'Ideal Clinic Monitoring System' Icon to open the Offline program



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



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



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

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 Component							
1) Administration	1) Signage and Notices	16						
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 posted from the nearest main roads up to the facility entrance	☺	11		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		13
2) Display board reflecting the facility name, service hours, physical address, contact details and service package details is visible at the entrance of the facility	☺			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		12
3) The NO WEAPONS, NO SMOKING, NO ANIMALS (except for service animals) and NO HAWKERS sign is clearly sign posted at the entrance of the facility	☺			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		14

11. 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.
13. 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

The screenshot shows a complex form with multiple sections. A navigation pane on the left (labeled 17) lists various components and sub-components. The main form area (labeled 15) includes sections for 'Data Method / Assessment', 'Assessment Date', 'Assessment Place', 'Assessment', 'Date of previous visit / assessment', and 'Component / Sub Component'. At the bottom, there is a table with columns for 'Questions to Ask / What to look for', 'Yes', 'No', and 'Partial'. The table contains three rows of questions related to external signage and public service on display. A red margin/exclamation mark is visible on the right side of the form (labeled 14).

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

 **health**

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Facility: Murraysburg Clinic

Status Determination Date	Status	Date Last Saved	Facility
2016/02/24	Saved	2016/02/24 09:58 PM	Murraysburg Clinic
2015/10/21	Saved	2015/10/21 11:42 AM	Itsekeng 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

18. 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.

File Help

19

Assessment Date: [Date] Assessment Status: [Status]

Changes implemented as a result of previous visits: [Text]

Date of previous visit / assessment: [Date]

Component: [List] Sub Component: [List]

Most Clinic Conditioned Reference: [Text]

Questions to Ask / What to look for:

Question	Yes	No	File
Is all external signage appropriate, visible and not defaced? Use catalogue to check against	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the reception, notice and emergency wards clearly sign-posted? Use catalogue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check if a copy of the HCS, Patient's Rights Charter (both Parts) Prescribed Core Values of the facility are on display. (Checklist for all required to be created)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Component: [List] Sub Component: [List]

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

Submit

20

Submit Assessment? Once submitted it can't be changed.

Yes No

20. The following message will appear



21. Click Yes; and the following message will appear

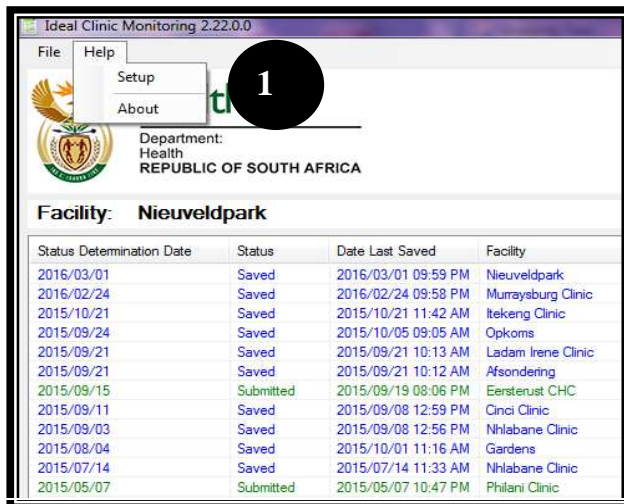


22. After you have closed the form that was submitted, you will see this Window.

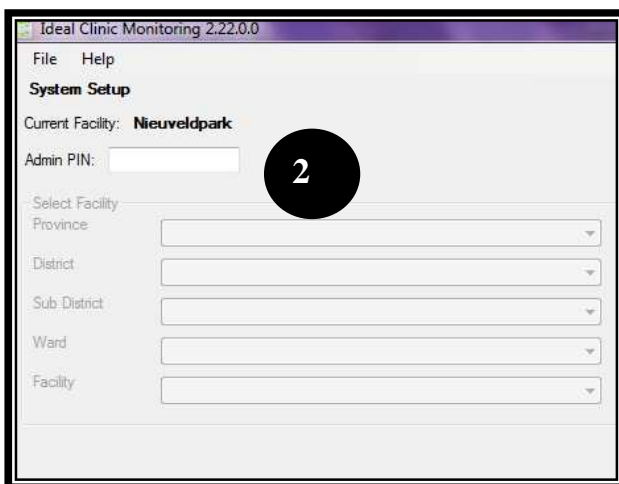
Note that the status has now changed to Submitted.

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

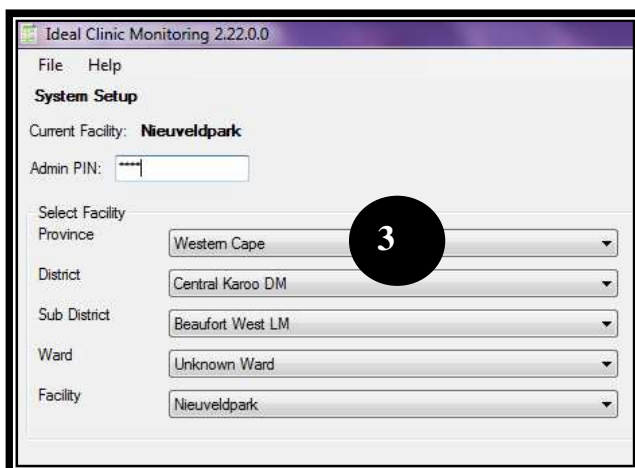
3. Capture for multiple facilities



1. The Offline module can be used to capture multiple facilities, especially in those areas where the network connectivity is not good, sub-district/district offices can use the Offline module to capture Status Determinations for all the facilities within their sub-district/ district. To capture a different facility after the initial setup was done, go to the 'Help' tab and select 'Setup'

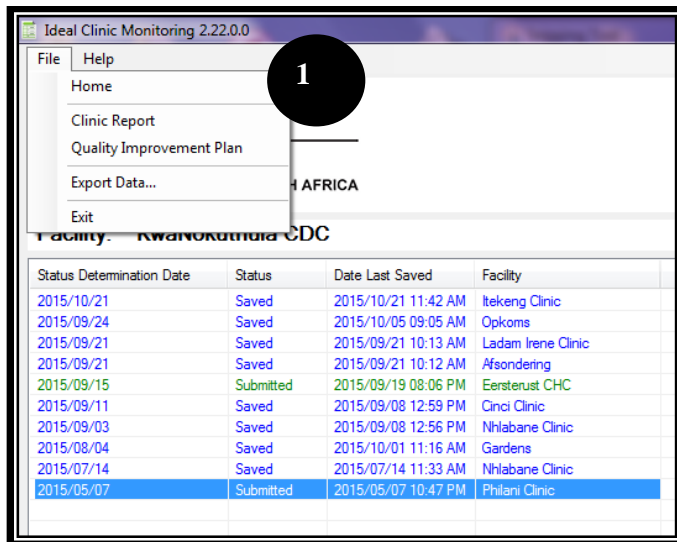


2. The following screen will appear. Type in again the generic pin '1234' in the box for 'Admin PIN'

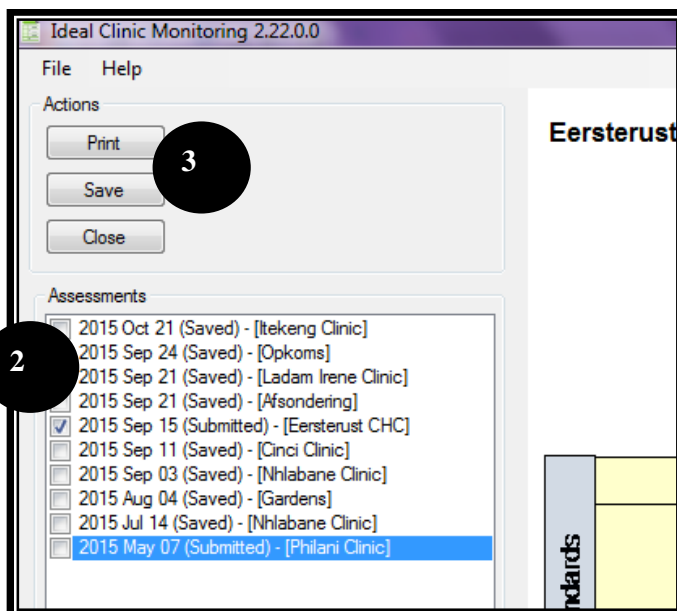


3. The list of facilities will appear, select the applicable facility and follow steps 5 to 7 on page 6 to capture data for the new facilities that was setup

4. Report generation



1. 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.

Ideal Clinic Monitoring

Legend

Yes
No
Partial
Not answered
To be assessed

Facility
District
Province
National

Ersterust CHC

2015 Sep

4

Components

Sub Component

Element

Weighting

Control

2015 Facility Monitoring

1) Signage and Notices

1 Road signs informing of the location of the facility are visibly posted from the nearest arterial

2 Display board reflecting the facility name, service hours (e.g. 24 hour, 8 hour, public holidays)

3 The GUN FREE, NO SMOKING, NO ANIMALS (except for service animals) and NO HAWKERS sign

4 Display board indicating a disclaimer on searches

5 Photos of political leadership of health are visually displayed

6 The Mission, Vision, Belief, Goals of the health facility are displayed for patients to clearly see

Average Result

Vital 47%

Essential 58%

Important 54%

Not weighted

Total 58%

Ideal Clinic Category

Not Achieved

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

Quality Improvement Plan

Itekeng Clinic

21 October 2015

File Help

Actions

Print

Save

Close

Assessments

2015 Oct 21 (Saved) - [Itekeng Clinic]

2015 Sep 24 (Saved) - [Opkoms]

2015 Sep 21 (Saved) - [Ladum Irene Clinic]

2015 Sep 21 (Saved) - [Afsondering]

2015 Sep 15 (Submitted) - [Ersterust CHC]

2015 Sep 11 (Saved) - [Cinci Clinic]

2015 Sep 03 (Saved) - [Nhlabane Clinic]

2015 Aug 04 (Saved) - [Gardens]

2015 Jul 14 (Saved) - [Nhlabane Clinic]

2015 May 07 (Submitted) - [Phlani Clinic]

Component

Sub Component

Administration

Signage and

5

6

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.

Quality Improvement Plan

Itekeng Clinic

21 October 2015

Component

Sub Component

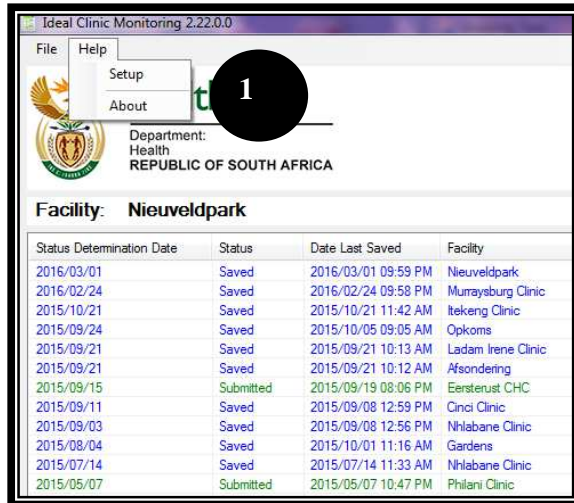
Administration

Signage and

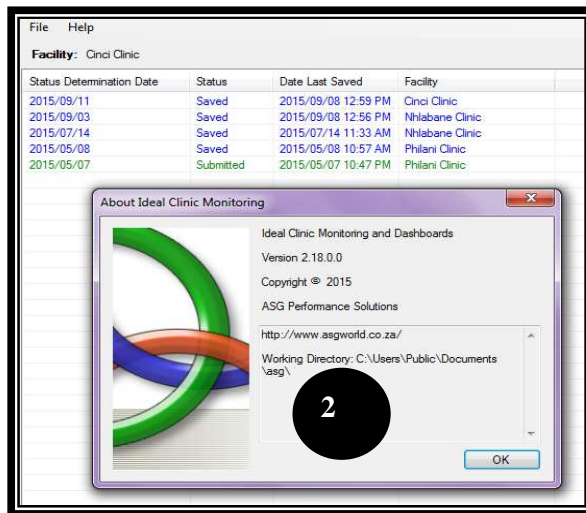
7

7. If you select 'Print' the report will open in Excel. Select the print option to print the file

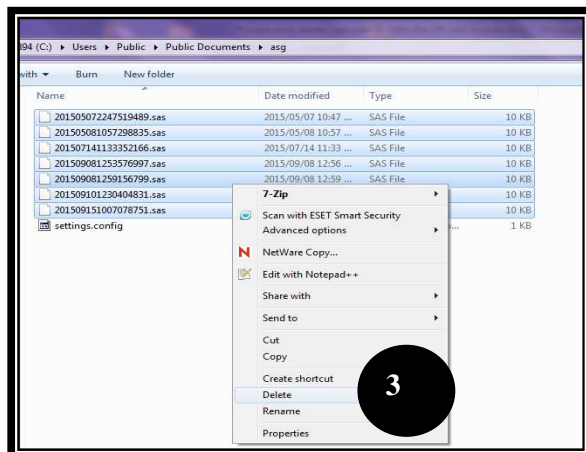
5. Deleting 'Submitted' files from the Offline module



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



2. 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\



3. 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.

Status Determination Date	Status	Date Last Saved	Facility
2015/09/15	Saved	2015/09/15 10:07 AM	CHC
2015/09/11	Saved	2015/09/08 12:59 PM	CHC
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

4. If you want to delete only a specific status determination because it was captured incorrectly and therefore the web based software does not allow the upload of the data. Go to the 'Home screen' of the Offline version under the 'File' tab. Check under the 'Date Last Saved' and note down the date and time the status determination you want to delete.

Name	Date modified	Type
201505072247519489.sas	2015/05/07 10:47 PM	SAS File
201507141133352166.sas	2015/07/14 11:33 AM	SAS File
201509081253576997.sas	2015/09/08 12:59 PM	SAS File
201509081259156799.sas	2015/09/08 12:56 PM	SAS File
201509101230404831.sas	2015/09/10 12:30 PM	SAS File
201509151007078751.sas	2015/09/15 10:07 AM	SAS File
settings.config	2015/09/17 08:17 AM	XML Configuration...

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.

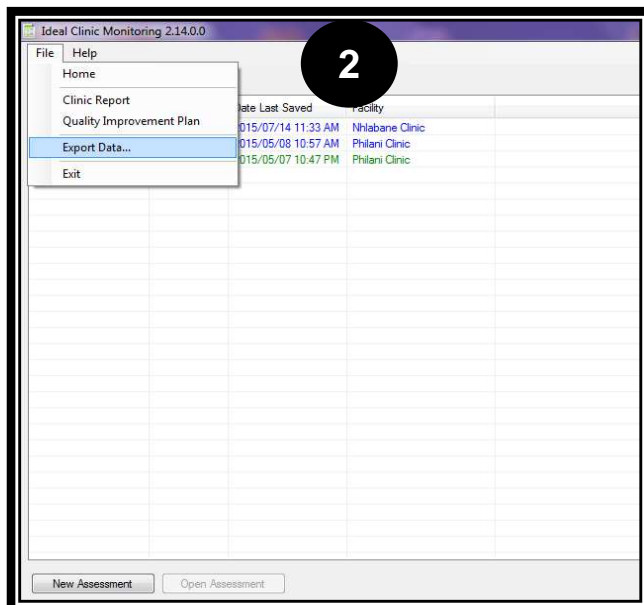
Name	Date modified	Type	Size
201505072247519489.sas	2015/05/07 10:47 PM	SAS File	10 KB
201507141133352166.sas	2015/07/14 11:33 AM	SAS File	10 KB
201509081253576997.sas	2015/09/08 12:59 PM	SAS File	10 KB
201509081259156799.sas	2015/09/08 12:56 PM	SAS File	10 KB
201509101230404831.sas	2015/09/10 12:30 PM	SAS File	10 KB
201509151007078751.sas	2015/09/15 10:07 AM	SAS File	10 KB
settings.config	2015/09/17 08:17 AM	XML Configuration...	1 KB

6. Select the file, right click the mouse and select 'delete'. Close the Offline module and reopen to affect the change.

6. Export and Upload Online

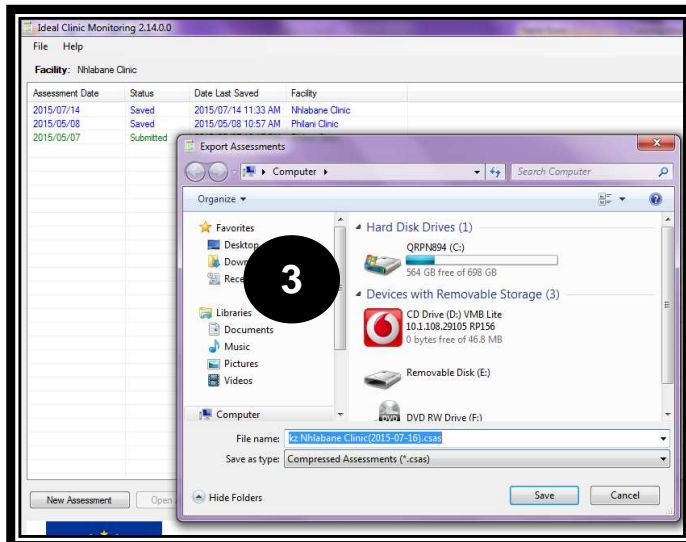


1. Go to the Desktop on your computer and Click on the Offline 'Ideal Clinic Monitoring System' Icon to open the Offline program



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



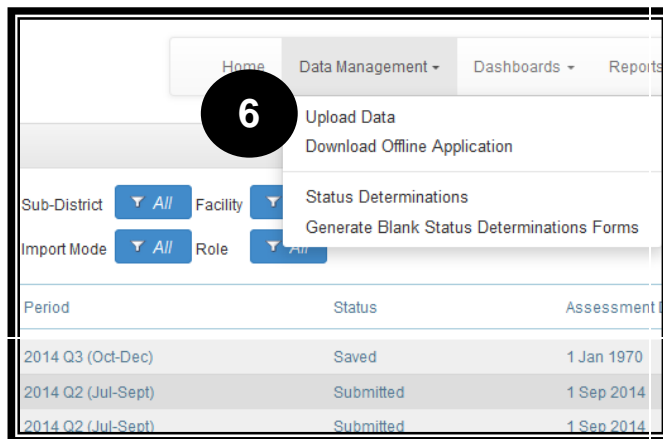
3. A screen will appear to prompt you where you want to save the exported file. Save it under your Document folder or on the memory stick that was provided for this purpose. Please don't change the type. For uploads a *.csas file format is needed. Also note that if assessments were capture for different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



4. A Message will come up to say 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

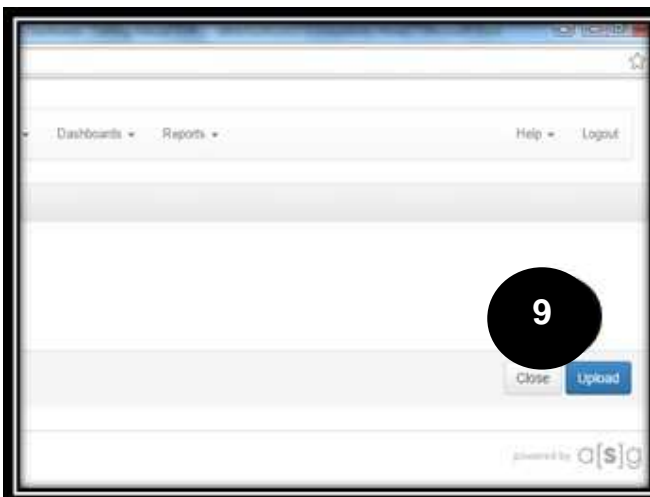


6. Once the Hope page opens, click on the drop-down arrow next to the Data Management tab.

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.

Status Determination Upload

Instructions:
Select a single file (.CSAS) or a ZIP of many .CSAS files.
Maximum file size: 10MB

The following files within the exports were ignored:

- File: 1 (20150824080007160.xas) in kz Qimelani Clinic(2015-09-07) CSAS. You do not have the required role to upload status determination role: SD PPTICRM

The following facility assessments have been loaded:

Facility	Visit Date	Period	Saved/Committed	Mode	Answers Uploaded
Qimelani Clinic	8 Jul 2015	2015 H1 (Apr - Sept)	Committed	Update	212
Ntemboweni Clinic	24 Aug 2015	2015 H1 (Apr - Sept)	Committed	Update	212

Browse...

Close Upload

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.
11. 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 ZIP of many .CSAS files.
Maximum file size: 10MB

The following facility assessments have been loaded:

Facility	Visit Date	Period	Saved/Committed	Mode	Answers Uploaded	Answers failed to load
Phlam Clinic	7 May 2015	2015 H1 (Apr - Sept)	Committed	Update	212	

Browse... No file selected

Close

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