



# TRAINING GUIDE TO CAPTURE CLINIC AND CHC STATUS DETERMINATIONS ON THE OFFLINE MODULE

APRIL 2016



**health**

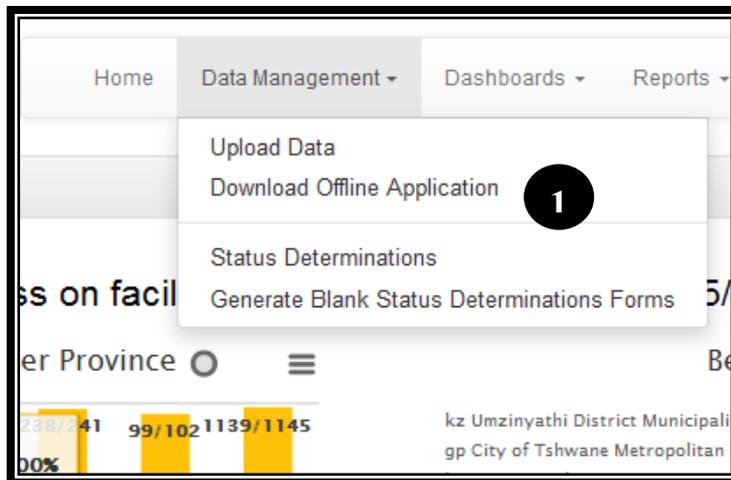
Department:  
Health  
REPUBLIC OF SOUTH AFRICA

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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



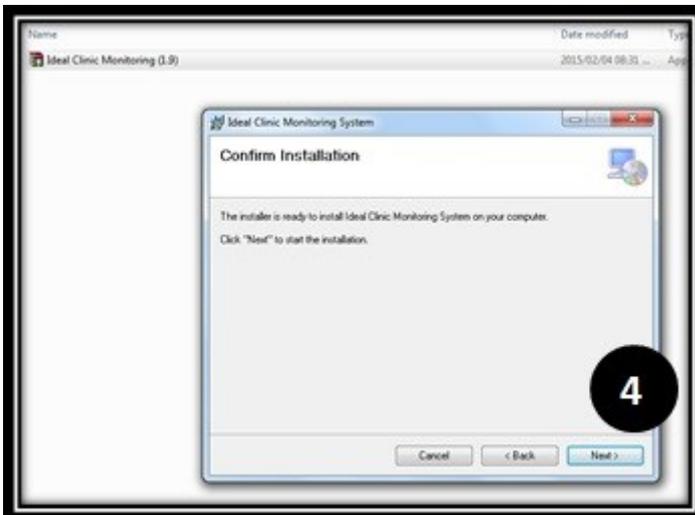
1. However, the Offline software is also available for download from the online software. You click on 'Data Management' and then 'Download Offline Application' and run (double click on the file) the installation file to start installation



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



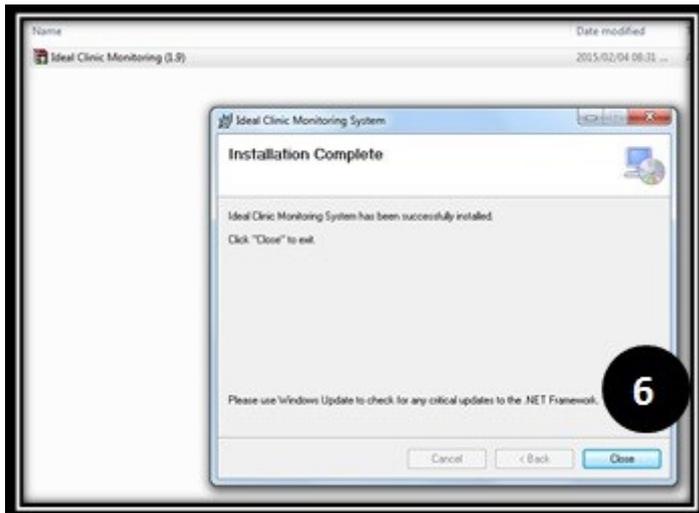
3. Leave all settings as it is and click Next



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

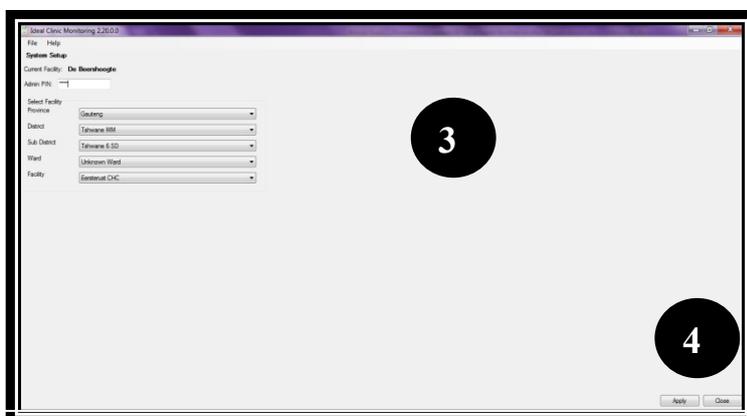
## 2. Capture Offline



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

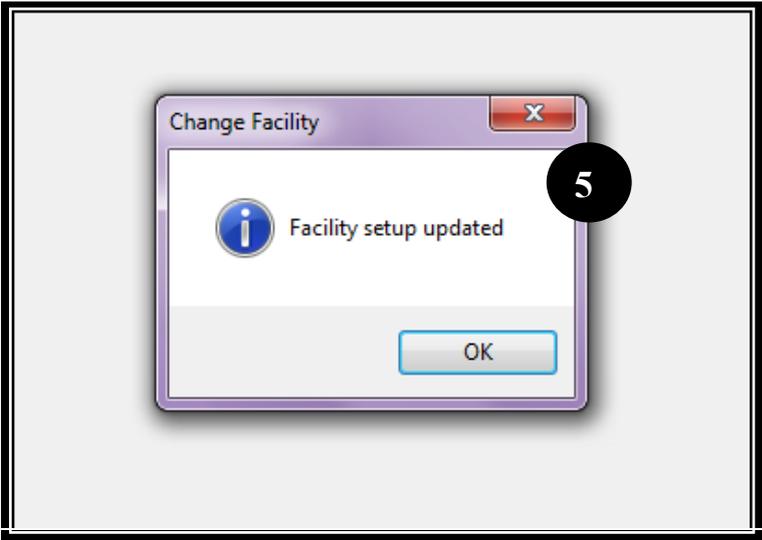


2. A Window will open (Setup screen) that requires an Admin Pin. Enter **1234** at the admin pin



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

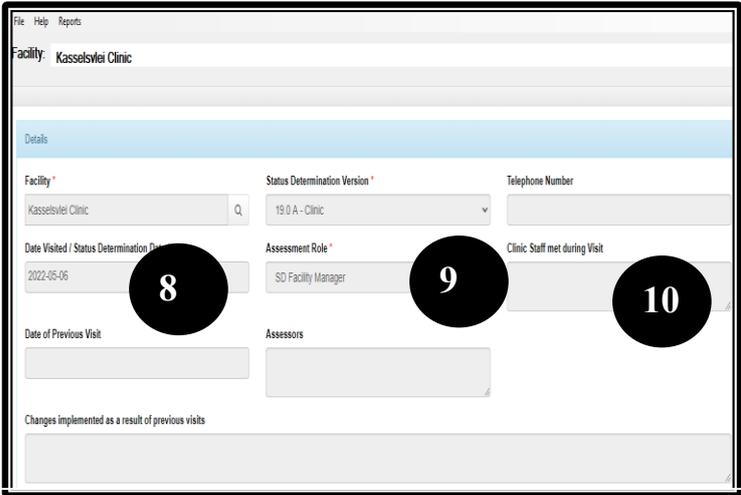
5. A message will appear that facility set up is updated



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 the Assessment Type 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



Sub Components/Sections				
g) Facility information board displayed at the entrance of the premises reflects relevant information for the facility		E	D	<div style="text-align: center;"><b>13</b></div> <div style="text-align: right;"><b>12</b></div>
f) Disclaimer sign is clearly sign posted at the entrance of the facility		E	D	Incomplete
h) Vision, mission and values of the province/district are visibly displayed			D	<input type="radio"/> Yes <input type="radio"/> No

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. Select the icon to the right of the element that will then open the checklist
13. Note that you will not be able to select the 'Yes' and 'No' for these elements..
14. The red margin/exclamation mark to the right of the pages will disappear once a score has been captured.

Facility: Kasselvlei Clinic

15

\* fields are required

Save Submit Close

Questions

Sub Components/Sections

Component	Sub Component
Administration	Signage and Notices

Ideal Clinic Dashboard Reference <i>The Ideal Functioning Clinic has...</i>	Method for Measurement	Weighting	Responsibility	Score	Current Challenges to reach the Ideal	Checklist
1) All external signage in place	☺	I	P	Incomplete		

15. After having captured the data, the form can be saved and you can continue at a later stage.

16

Save

Record saved

OK

17

Save Submit Close

16. When you click on 'Save' you will get a message that says, 'Record saved'.

17. Click 'OK' and then Click on 'Close' to close the form

File Help



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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	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

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.

Details

Facility \*  
Kasselsvelel Clinic

Status Determination Version \*  
19.0 A - Clinic

Telephone Number

Date Visited / Status Determination Date \*  
2022-06-06

Assessment Role \*  
SD Facility Manager

Clinic Staff met during Visit

Date of Previous Visit

Assessors

Changes implemented as a result of previous visits

\* Fields are required

Save Submit Close

19

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

Submit

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

Yes No

20

20. The following message will appear

Assessment

Assessment has been submitted

OK

21

21. Click Yes; and the following message will appear

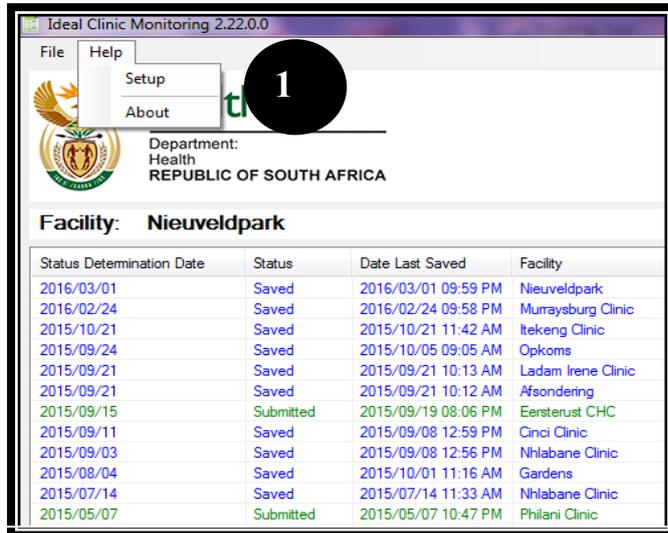


22. After you have closed the form that was submitted, you will see this Window.

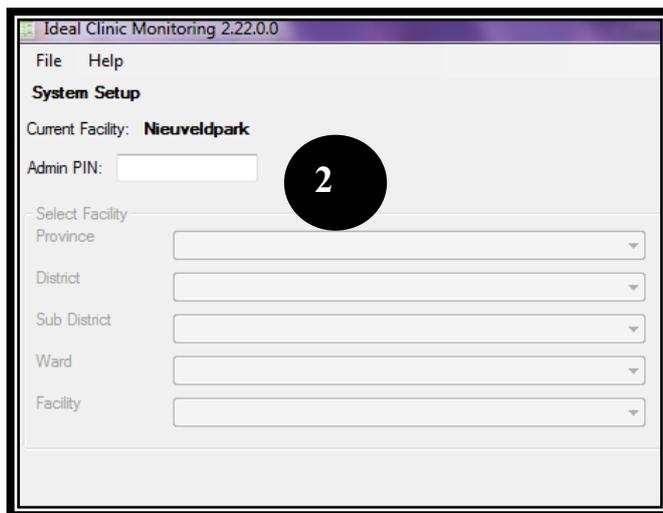
Note that the status has now changed to Submitted.

**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

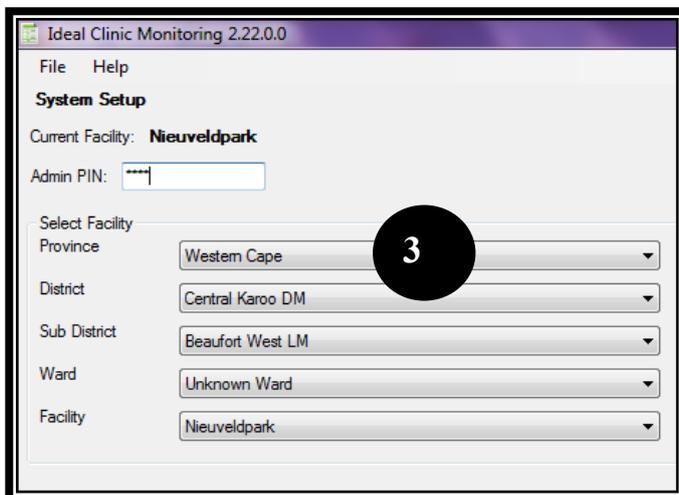
### 3. Capture for multiple facilities



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'

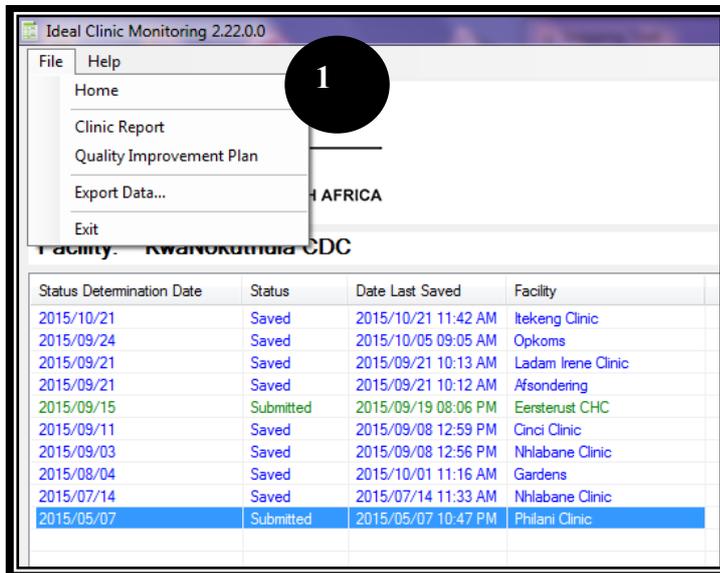


2. The following screen will appear. Type in again the generic pin '1234' in the box for 'Admin PIN'

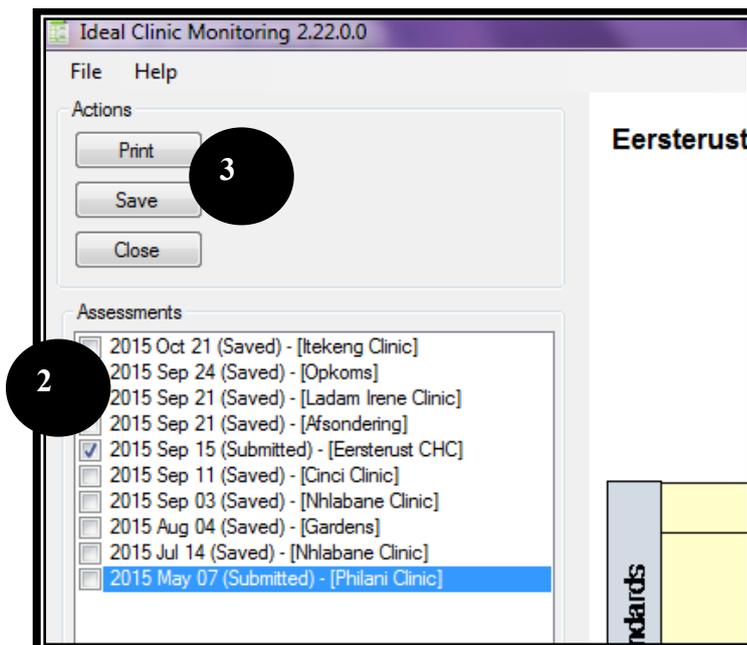


3. The list of facilities will appear, select the applicable facility and follow steps 5 to 7 on page 6 to capture data for the new facilities that was setup

## 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**

Eersterust CHC

Legend

- Yes
- No
- Partial
- Not answered
- To be assessed

Facility  
District  
Province  
National

Period: 2015 Sep

SD FACILITY MANAGEMENT

Component	Sub Component	Element	Weighting	Control	Result
1) Signage and Notices					
1		Road signs informing of the location of the facility are visibly posted from the nearest arterial	P	D	Yes
2		Display board reflecting the facility name, service hours (e.g. 24 hour, 8 hour, public holidays)	D	D	Yes
3		The GUN FREE, NO SMOKING, NO ANIMALS (except for service animals) and NO HAWKERS sign	D	D	Yes
4		Display board indicating a disclaimer on searches	I	D	Yes
5		Photos of political leadership of health are visually displayed	I	D	Yes
6		The Mission, Vision, Belief, Goals of the health facility are displayed for patients to clearly see	D	D	Yes

Average Result

Vital	100%
Essential	100%
Important	100%
Not weighted	100%
Total	100%

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

**Ideal Clinic Monitoring 2015**

File Help

Actions

Print

Save

Close

Quality Improvement Plan  
Itekeng Clinic  
21 October 2015

Assessments

- 2015 Oct 21 (Saved) - [Itekeng Clinic]
- 2015 Sep 24 (Saved) - [Opkoms]
- 2015 Sep 21 (Saved) - [Ladnam Irene Clinic]
- 2015 Sep 21 (Saved) - [Afsonderrig]
- 2015 Sep 15 (Submitted) - [Eersterust 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 Notices

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

- 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.
- 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.

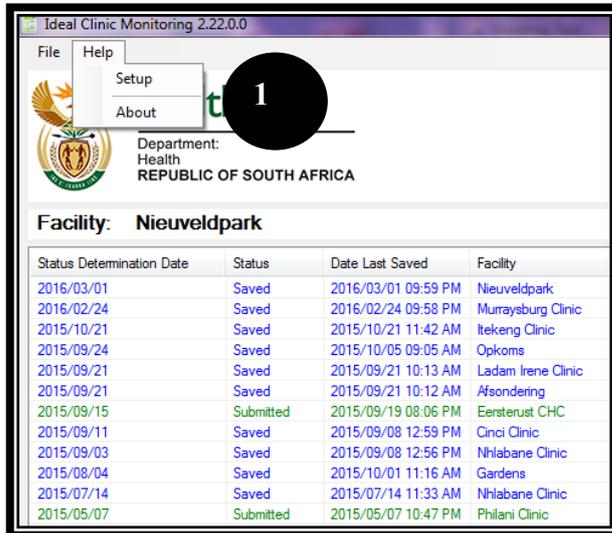
**Quality Improvement Plan**

Itekeng Clinic

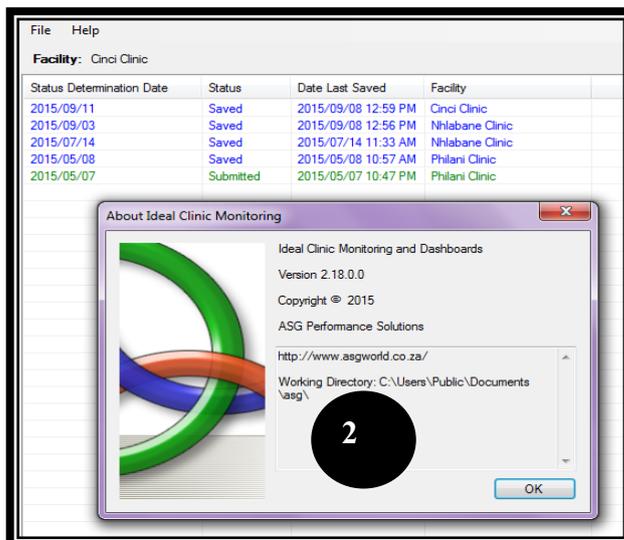
Component	Sub Component	Item/Item Description/Reference	No	Partial	Excellent	Activity	By Whom	When	Results
Administration	Signage, Branding and Line Art	Internal signage in place	1						
Administration	Service Organisation	Reception/Information staff available	1						
Administration	Service Organisation	Staff receive, greet, help and inform	1						
Administration	Service Organisation	Complaints/Complaints forms in place	1						
Administration	Service Organisation	Patient Records filed in one place	1						
Administration	Service Organisation	Patient Records organized	1						
Administration	Service Organisation	Clinic stationary available	1						
Administration	Finance and SOM	Financial Statements in place	1						
Administration	Finance and SOM	Clinic Budget and Expenditure data	1						
Clinic Guidelines and iClinic Service Integration		PHC Facility/Programs programmes log	1						
Clinic Guidelines and iClinic Service Integration		PHC Facility/Programs programmes log	1						
Clinic Guidelines and iClinic Service Integration		PHC supervision reports, and clinical	1						
Clinic Guidelines and iClinic Service Integration		Clinic service improvement plan in place	1						
Clinic Guidelines and iClinic Service Integration		Clinic service improvement plan implemented	1						
Clinic Guidelines and iClinic Service Integration		3 instances of services created/added	1						
Clinic Guidelines and iClinic Service Integration		Designated waiting areas identified	1						
Clinic Guidelines and iClinic Service Integration		Designated observation areas identified	1						
Clinic Guidelines and iClinic Service Integration		Patient appointment scheduling system	1						
Clinic Guidelines and iClinic Service Integration		Pre-empting of patient medication	1						
Clinic Guidelines and iClinic Service Integration		Patient satisfaction survey conducted	1						
Clinic Guidelines and iClinic Management		All staff trained on H5N1, and non-communicable diseases	1						
Clinic Guidelines and iClinic Management		Availability of Supervision policy in place	1						
Clinic Guidelines and iClinic Management		Availability of Waiting Time policy in place	1						
Clinic Guidelines and iClinic Management		Availability of protocol/directive in place	1						
Clinic Guidelines and iClinic Management		Waiting time Clinic, Waiting time of patients	1						
Clinic Guidelines and iClinic Management		Availability of Patient Satisfaction survey	1						
Clinic Guidelines and iClinic Management		Availability of protocol/directive in place	1						
Clinic Guidelines and iClinic Management		Availability of protocol/directive in place	1						
Clinic Guidelines and iClinic Management		Availability of Infection Prevention protocol	1						
Clinic Guidelines and iClinic Management		Adult sexual abuse and violence protocol	1						
Clinic Guidelines and iClinic Management		Disciplinary officer report in place	1						
Availability of a Doctor - Doctor Services		Doctor uses the required antibiotic	1						
Medicines, Supplies and Medicines and Supplies		Inventory Management Monitoring system in place	1						
Medicines, Supplies and Medicines and Supplies		Dispensary room temperature appropriate	1						

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

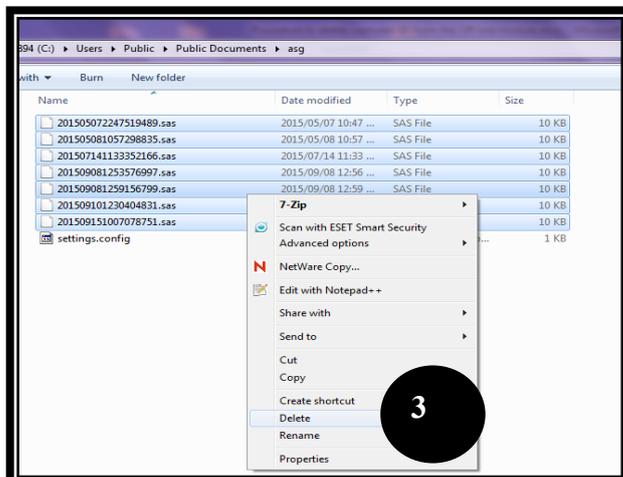
## 5. Deleting 'Submitted' files from the Offline module



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.

Ideal Clinic Monitoring 2.20.0.0

File Help

Facility: Ambergate Clinic

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	Ambergate Clinic
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.

QRPN894 (C:) > Users > Public > Public Documents > asg

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 12:59 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 File

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.

QRPN894 (C:) > Users > Public > Public Documents > asg

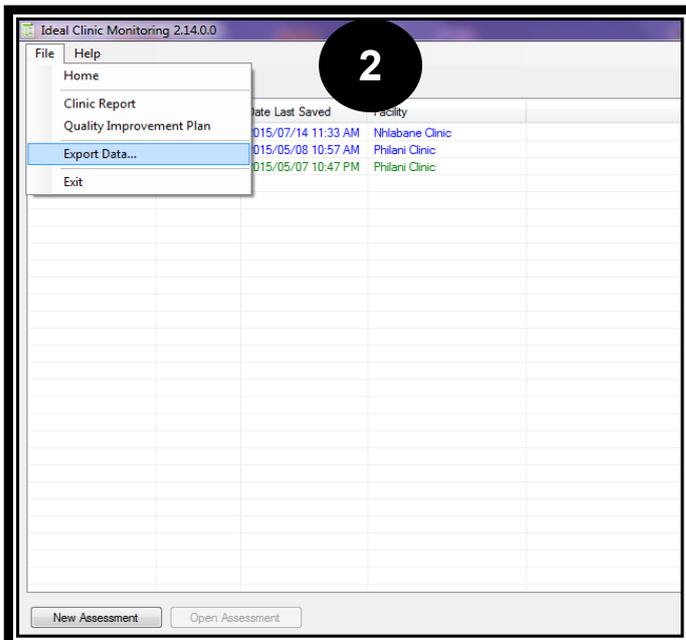
Name	Date modified	Type	Size
201505072247519489.sas	2015/05/07 10:47 PM	SAS File	10 KB
201507141133352166.sas	2015/07/14 11:33 AM	SAS File	10 KB
201509081253576997.sas	2015/09/08 12:56 PM	SAS File	10 KB
201509081259156799.sas	2015/09/08 12:59 PM	SAS File	10 KB
201509101230404831.sas	2015/09/10 12:30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

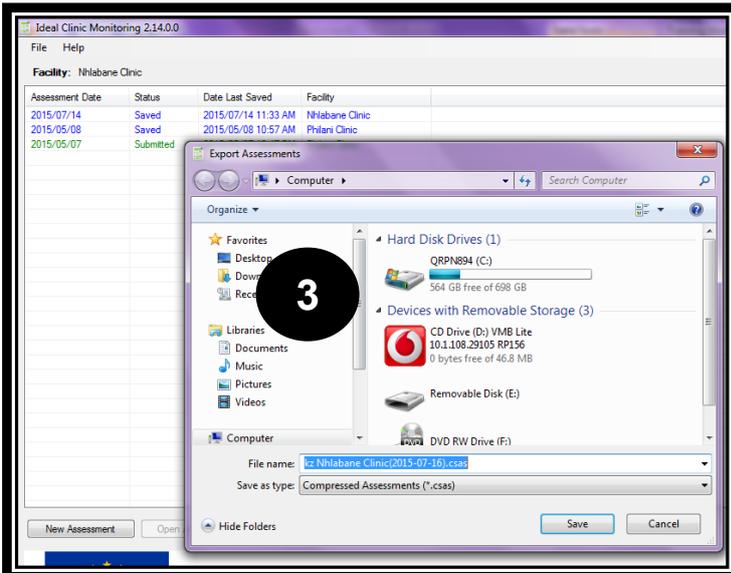


1. Go to the Desktop on your computer and Click on the Offline 'Ideal Clinic Monitoring System' Icon to open the Offline program

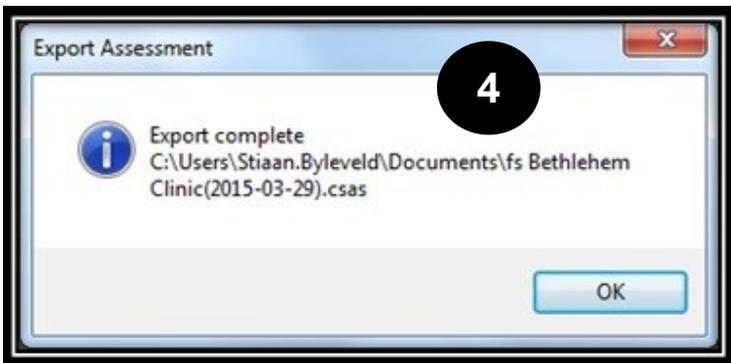


2. Go to the 'File' tab and select 'Export Data'. Very important: before exporting, check under the status column that all the assessments show "**Submitted**". Assessments that have a "saved" status will not show on the reports and dashboards once the file have been uploaded on the online software.

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.

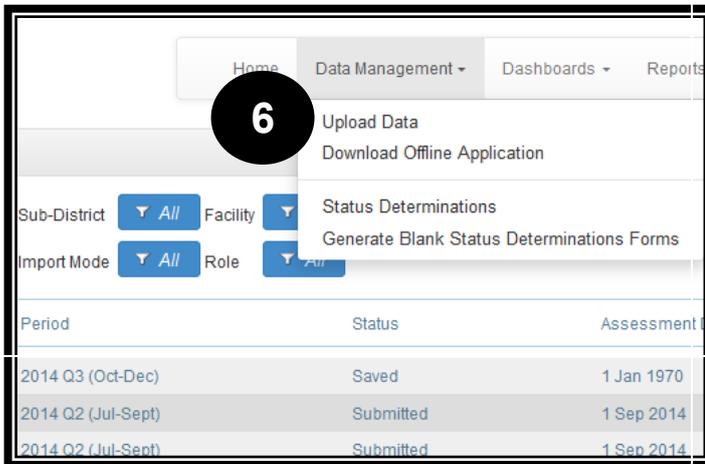


4. A Message will come up to say that the Export was successful



Go to [www.idealhealthfacility.co.za](http://www.idealhealthfacility.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

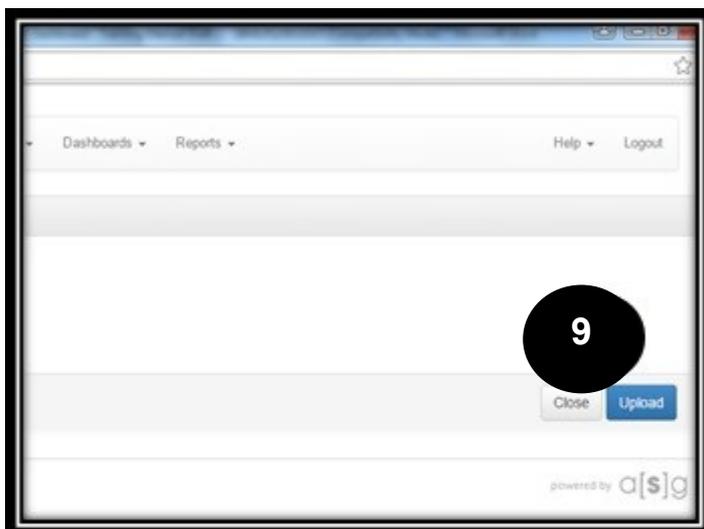


6. Once the Home page opens, click on the drop-down arrow next to the Data Management tab.

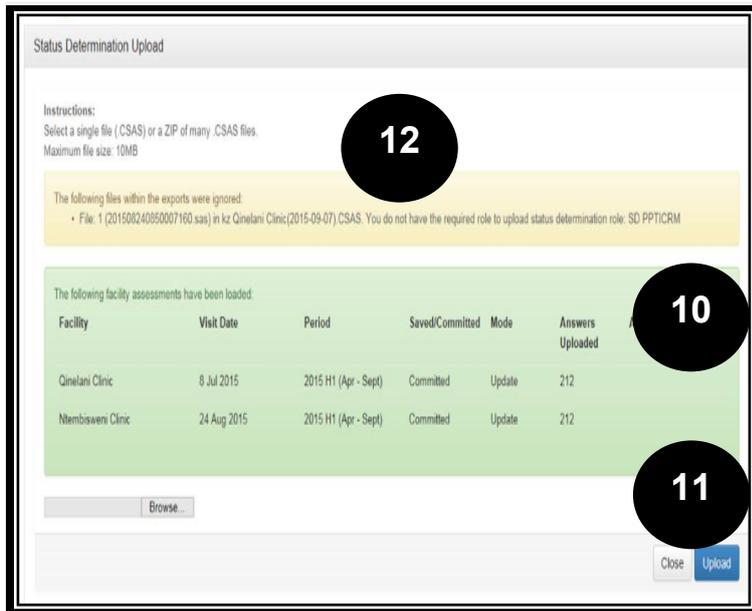
Select 'Upload Data' to import the file



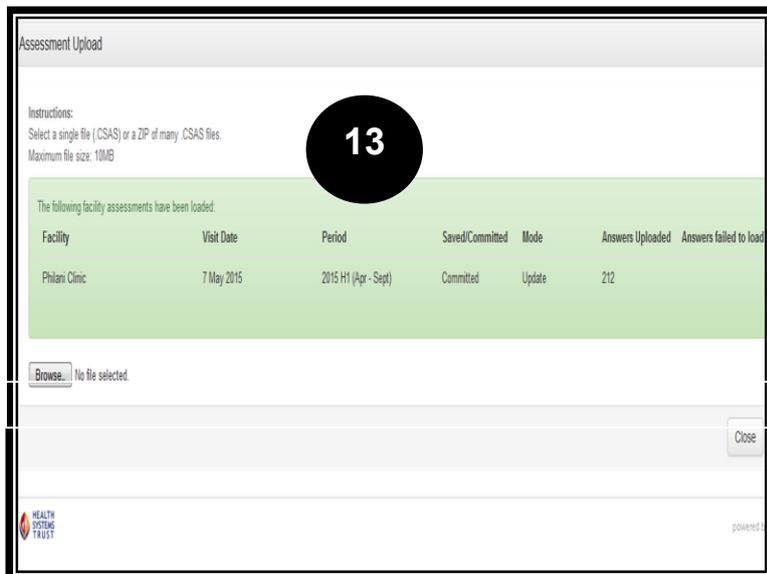
- 7. Click on 'Choose File'
- 8. Browse to find the Export File (\*.csas file format) that you have saved on your computer or on a memory stick



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



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



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