



TRAINING GUIDE TO CAPTURE IDEAL CLINIC/CHC STATUS DETERMINATIONS ON THE WEB- BASED SOFTWARE

June 2024



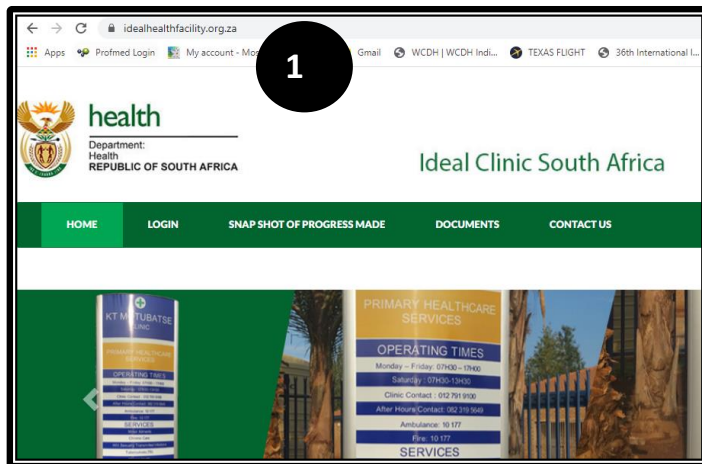
health

Department:
Health
REPUBLIC OF SOUTH AFRICA

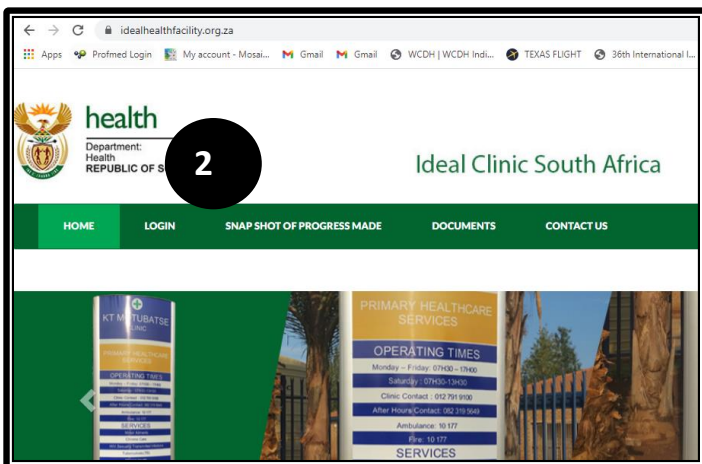
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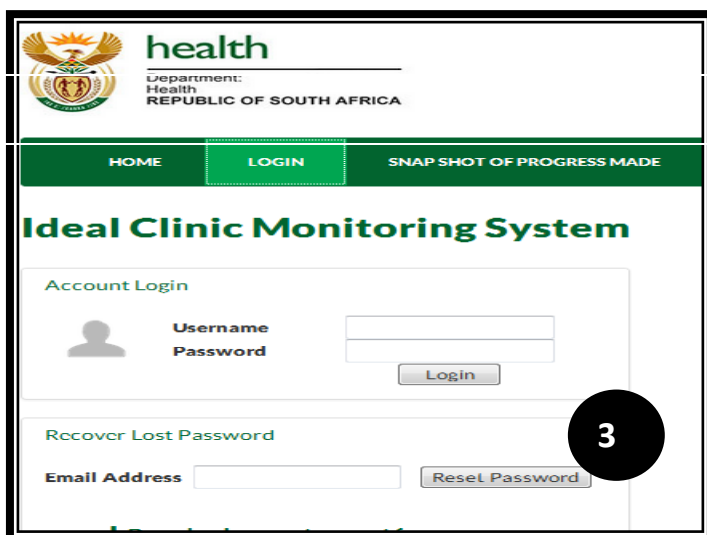
1. Log onto the web-based Ideal Clinic software



1. Go to the Department of Health's website <https://www.health.gov.za>, there is a tab named Ideal Clinic. Click on it to redirect you to the Ideal Clinic website: <https://www.idealhealthfacility.org.za> or you can access the site directly.



2. Select the 'LOGIN' tab



3. Enter your Username and the temporarily Password that was e-mailed to you in the text boxes provided and click on the 'Login' button.

Refer to the introduction training manual for software how to obtain a user account.

Reset Password

For security purposes, you are required to change your password as you have either logged on for the first time or had your password reset. Please note that your new password must be different from your current password.

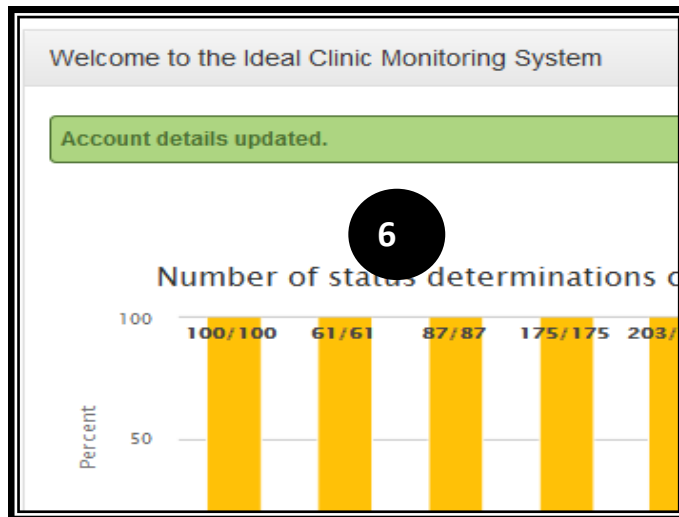
Change your password

Username	rsteinhobel	The email address of the user (Must be in the system)
Password	*****	The user's password
Repeat Password	*****	
Title	Mrs	The user's title
Firstname	Ronel	The user's first name
Lastname	Steinhobel	The user's lastname
Email address	ronel.steinhobel@gmail.com	The user's email address
Type of account	User	The user's account type
Last Login Time	2015-02-24 10:20:23.560	The date and time of the last login
Enabled	1	Is account enabled

Cancel Save

4. When you Login the first time this window will open that will require you to enter a new Password. Enter a new Password twice in each box provided. Note that the password must have 8 characters of which one must be a capital letter and one a numeric value.
5. Click on Save to continue to the Home page

Note: The system will automatically prompt the user to change the password every three months.



6. A message will appear stating "Account details updated"

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HOME LOGIN SNAP SHOT OF PROGRESS MADE

Ideal Clinic Monitoring System

Account Login

Username Password Login

Recover Lost Password 7 8

Email Address Reset Password

In cases where staff forget/lost their Password follow the procedure as set out in point 1 to 2

7. Enter your e-mail address that was used to create your user account in the text box provided to "Recover Lost Password".
8. Select the 'Reset Password' button

9. A message will appear stating: "A new password has been send to your email address"

Recover Lost Password

A new password has been sent to your email address 9

Email Address Reset Password

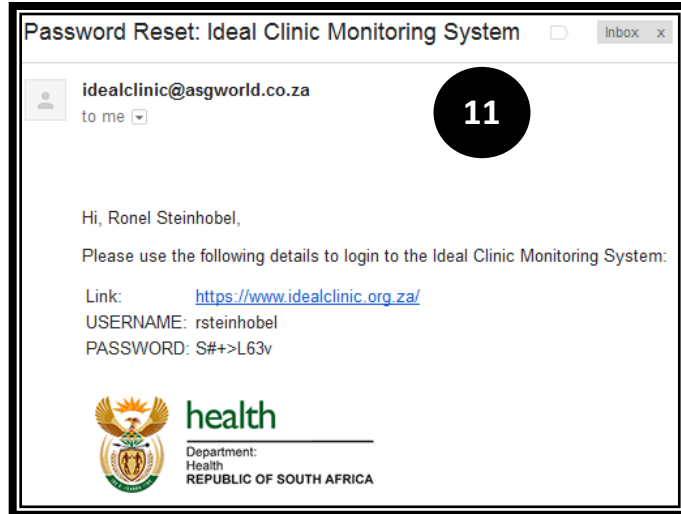
10. If the account does not exist or you have mistyped your e-mail address a message will appear stating "Account does not exists for this email address". If your account was disabled because you did not access it for 3 months, you will receive a message that your account has been disabled.

Account Login

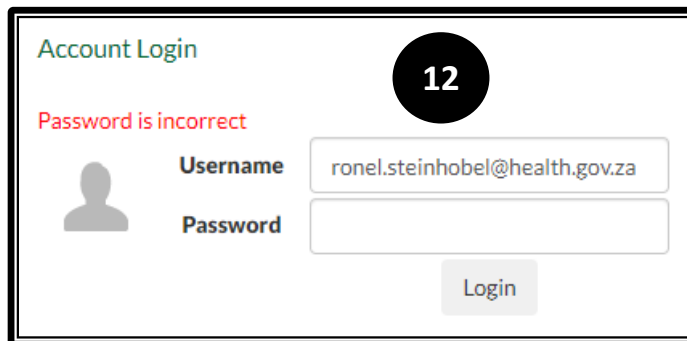
Account does not exist 10

Username Password Login

Contact your provincial or district coordinator for assistance to obtain a user account.



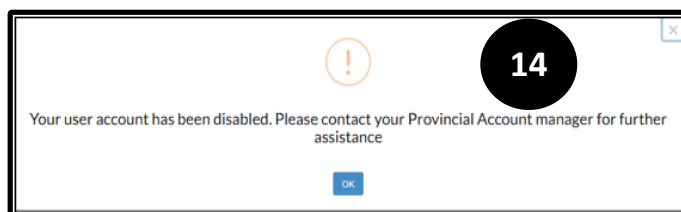
11. The user will then receive an e-mail on the registered e-mail address. Enter your Username and the temporally Password that was emailed to you in the boxes provided (see point 3 to 6)



12. **Note:** When logging and the password is typed in incorrectly in the password text box a message will be displayed stating "Password incorrect".

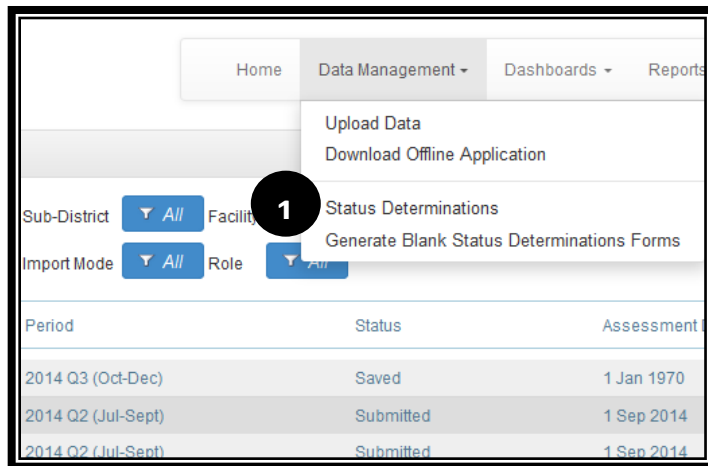


13. **Note:** The user has 6 attempts to login. On the 5th attempt a pop-up message will prompt the user that the account will be disabled on the next 6th attempt. Therefore make sure you type in your password correctly and make use of the 'Recover Lost Password' option if the user can't remember the password.



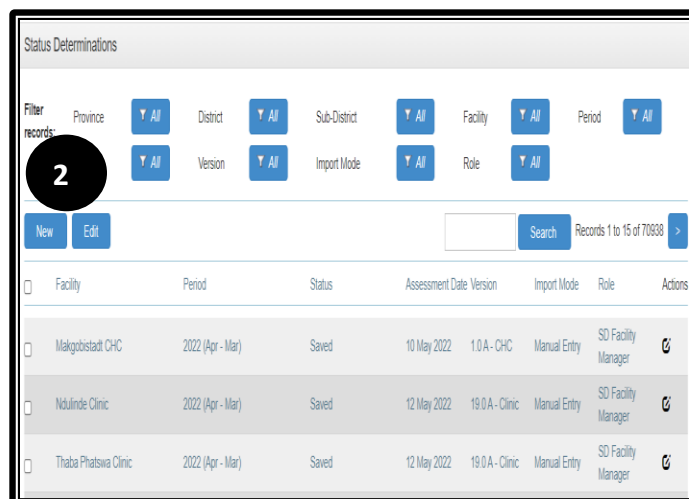
14. **Note:** On the 6th attempt the account will be disabled. The user must then complete a new user account form and submit it to the Provincial/district account manager.

2. Capture online

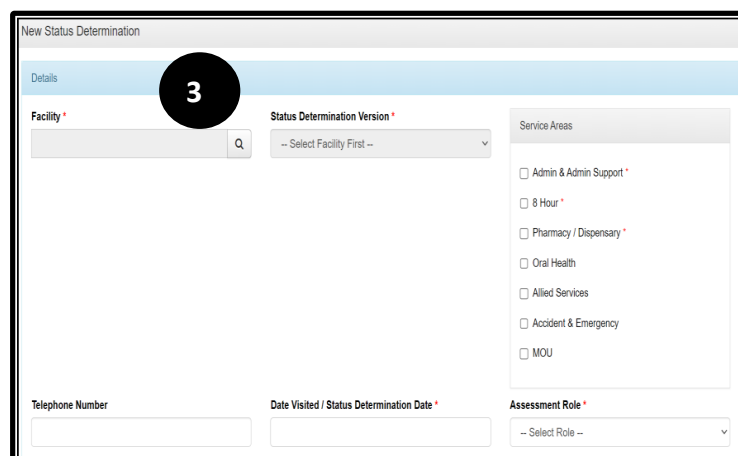


Log onto the software on the webpage – www.idealhealthfacility.org.za.

1. Go to the Data Management tab and select 'Status Determinations' option.



2. Click on the 'New' button to capture a new status determination.



3. Click on the magnifying glass to select the facility name that you want to capture a status determination for.

Facilities

Filter records: Province Sub District District Classification

Facility	Ward	Sub District	District
<input type="radio"/> Sinqobile Clinic	Unknown Ward	Pitsoy Ka Seme LM	G Sibande DM
<input type="radio"/> Mogopela A Clinic	Unknown Ward	Greater Taung LM	Ruth Segomotsi Mompoti DM
<input type="radio"/> Ikemeng Clinic	Unknown Ward	Rustenburg LM	Bojanala Platinum DM
<input type="radio"/> Mathopetad Clinic	Unknown Ward	Kgetleng Rivier LM	Bojanala Platinum DM
<input type="radio"/> Mosweu Clinic	Unknown Ward	R Moiloa LM	Ngaka Modiri Molema DM
<input type="radio"/> White City Clinic	Unknown Ward	Ekurhuleni E2 SD	Ekurhuleni MM
<input type="radio"/> ...ena Clinic	Unknown Ward	Masinga LM	Umtshini DM
<input type="radio"/> ...gweni Dam Clinic	Unknown Ward	eThekweni MM Sub	eThekweni MM
<input type="radio"/> Midoroni Clinic	Unknown Ward	Makhado LM	Vhembe DM
<input type="radio"/> Sefikile Clinic	Unknown Ward	Moses Kotane LM	Bojanala Platinum DM

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- Type in the facility name in the search box for the facility that you want to capture the status determination for.
- Click on the search button.
- Select the facility from the list that appears by clicking on the radio button.
- Click the Select button

New Status Determination

Details

Facility *

Status Determination Version *

Service Areas

☐ Admin & Admin Support *

☐ 8 Hour *

☐ Pharmacy / Dispensary *

☐ Oral Health

☐ Allied Services

☐ Accident & Emergency

☐ MOU

Telephone Number

Date Visited / Status Determination Date *

Assessment Role *

The following fields are compulsory to complete:

- Select from the dropdown list at the 'Status Determination Version'. The version will default to the current version.
- Select the 'Status determination Role' option and select the role. Note you will only see the roles that your account has access to.
- Enter the date of visit

11. Select the service areas applicable that are functional at the facility by ticking the box next to the area.

The other information on the form is not compulsory to complete but it is good practice to complete it, therefore it is advisable to complete it.

Note: Admin & Admin Support, 8 Hour and Pharmacy/Dispensary are compulsory areas and must therefore be selected. If not selected and error message will appear that the areas are required.

Once the 'Save' button has been selected, the areas can be changed and/or modified, to select the required service areas. However, it is recommended to select the correct service areas from the start of your capturing to avoid capturing errors.

Other information e.g. Visited SD date, Assessment Role and Version cannot be changed once the form has been saved.

Facility * Sonwable Clinic

Status Determination Version * 20 - Clinics & CHCs

Service Areas

- ☒ Admin & Admin Support *
- ☒ 8 Hour *
- ☒ Pharmacy / Dispensary *
- ☐ Oral Health
- ☐ Allied Services
- ☐ Accident & Emergency
- ☐ MOU

Telephone Number

Date Visited / Status Determination Date * 2024-06-03

Clinic Staff met during Visit

Date of Previous Visit 2024-05-15

Assessment Role * SD Facility Manager

Assessors

Changes implemented as a result of previous visits

* fields are required

Save Close

12. Click the “Save” button. **Note:** The assessment form will only display after the “Save” button was clicked. **Once the “Save” button has been selected the “Visited SD date, Assessment Role and Version” cannot be changed Therefore, make sure it is correct before you select the “Save” button.**

Status Determinations

Update service areas. Delete status determination.

Logout

Province: All District: All Sub-District: All Facility: All Period: All

Status: All Version: All Import Mode: All Role: All

New Edit Search Records 1 to 15 of 56497

Facility	Period	Status	Assessment Date	Date SD Submitted	Version	Import Mode	Role	Actions
Sonwable Clinic	2023 (Apr - Mar)	Saved	4 Jun 2024		20 - Clinics & CHCs	Manual	Manager	

13. If a service area was omitted when the SD was created, it can be added. Service areas can also be removed. To remove/add a service area, click on the pencil icon under the “Action” column.

14. A pop-up box will appear, select “Update service areas”.

Edit Service Areas

Note: De-selecting an area will remove any existing element and checklist answers

Details

Facility: Sonwable Clinic

Classification: Clinic

Status Determination Version: 20 - Clinics & CHCs

Date Visited / Status Determination Date 2024-06-04

Areas

- ☒ Admin & Admin Support *
- ☒ 8 Hour *
- ☒ Pharmacy / Dispensary *
- ☐ Oral Health
- ☐ Allied Services
- ☐ Accident & Emergency
- ☐ MOU

Save Close

15. The “Edit Service Area” screen will appear. Select or deselect the service areas.

16. Save the Service areas.

3) Disclaimer sign is clearly sign posted at the entrance of the facility	☹	E	D		17
4) Vision, mission and values of the province/district are visibly displayed	☹	I	D	<input type="radio"/> Yes <input type="radio"/> No	18

16

19

* Checklist must be completed before submitting.

16. To capture the scores, select the score for each element by clicking on the radio button.
17. 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' and 'No' on the dashboard as the options are not available. Select the icon to the right of the element that will then open the checklist.
18. Remember to write a comment in the 'Current Challenges column' where applicable.
19. The red margin to the right of the pages will disappear once a

Profmed Login My account - Mosai... Gmail G www.idealhealthfacility.org.za says Resources for Policy...

Sub Components

Close 16 OK

Use the checklist below to check whether all service are:
 Scoring – in column for score mark as follows:
 Y (Yes) = present, N (No) = not present;

Internal Branding	Score
Help Desk/Reception	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Complaints/suggestions/compliments box	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Pharmacy/ dispensary	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Time and days services are offered at the pharmacy/dispensary are displayed at eh entrance of the pharmacy/dispensary	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Chronic Medicine Collection (CCMDD/CDU)	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
24 Hour Emergency Unit	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Maternity Obstetric Unit	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Oral Health Services	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
X-rays (if applicable)	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N
Facility Manager – door identifier	<input checked="" type="radio"/> N/A <input type="radio"/> Y <input type="radio"/> N

15

For the elements that have a checklist, after you have clicked on the icon for the checklist, the checklist form will open.

15. Select the various scores by clicking on the radio button.
16. On completion select the close button once done. Note that you must score all the measures on the checklists before a score is calculated.

Note: The Clinic and CHC Framework contains all the elements for both Clinics and CHCs. For elements that are only required to be completed by specific areas e.g MOU/AE/Allied, click on the checklist, then close it again (the scores will be greyed out, therefore you cannot select a score), a pop-up message will appear “Since all checklist options are marked N/A, the element will also be marked as N/A”. Click on the “OK” button.

* fields are required

Questions

17

Save

Close

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			☰

* Checklist must be completed before submitting

17. Remember to **select the 'Save' button at regular intervals**. If connection is lost during capturing the data will be lost if the 'save' function was not used while capturing.

You can "Save" the status determination and complete it on another day. Click on the "Close" button to close the status determination.

3. Retrieve a 'saved' status determination

The screenshot shows the 'Status Determinations' interface. At the top, there are filter buttons for Province, District, Sub-District, Ward, Facility, Period, Status, Import Mode, and Role. Below these is a table with columns: Facility, Period, Status, Assessment Date, Import Mode, and Role. The table contains six rows of data. At the bottom of the table, there are 'New' and 'Edit' buttons (callout 4), a search bar with 'nellmapius' entered (callout 1), a 'Search' button (callout 2), and a 'Clear' button. A 'Records 1 to 6 of 6' indicator is also present. A large callout '3' is placed over the table header area.

Facility	Period	Status	Assessment Date	Import Mode	Role
Nellmapius	2015 (Apr - Mar)	Saved	2 Feb 2016	Manual Entry	SD PPTICRM PR
Nellmapius	2015 (Apr - Mar)	Submitted	22 Dec 2015	Manual Entry	SD PPTICRM
Nellmapius	2015 (Apr - Mar)	Submitted	2 Dec 2015	Manual Entry	SD PPTICRM
Nellmapius	2015 (Apr - Mar)	Submitted	28 May 2015	Manual Entry	SD PPTICRM
Nellmapius	2014 Q4 (Jan - Mar)	Submitted	17 Mar 2015	Manual Entry	SD Facility Manager
Nellmapius	2014 Q3 (Oct-Dec)	Submitted	1 Dec 2014	Historic Upload	Self Assessment

Login and go to the 'Status Determination' tab

1. Type the facility name that you have saved a Status Determination (SD) for and you want to recall it to complete it and submit it.
2. Select the search button.
3. A list of all the SDs for that facility will come up. Click on the tick box next to the facility's status determination. Select the one that you want to open.
4. Click the 'Edit' button.

The screenshot shows the 'Facility' status determination form. At the top, there is a 'Facility' dropdown menu with 'Sonwabile Clinic' selected and a search icon. Next to it is a 'Status Determination Version' dropdown menu with '20 - Clinics & CHCs' selected. Below these are several input fields: 'Telephone Number', 'Clinic Staff met during Visit', 'Date Visited / Status Determination Date' (with value '2024-06-03'), 'Date of Previous Visit' (with value '2024-05-15'), 'Assessment Role' (with value 'SD Facility Manager'), and 'Assessors'. There is also a 'Service Areas' section with checkboxes for 'Admin & Admin Support', '8 Hour', 'Pharmacy / Dispensary', 'Oral Health', 'Allied Services', 'Accident & Emergency', and 'MOU'. At the bottom, there is a 'Changes implemented as a result of previous visits' text area, a 'Save' button, and a 'Close' button. A large callout '5' is placed over the 'Date Visited / Status Determination Date' field.

5. The dashboard form for the facility will come up. Complete the status determination.

4.Submitting a Status Determination



1. Once all the elements have been scored (no red lines are showing at the right side of the form), the “Submit” button will be made available to submit your status determination.

Note: If the “Submit” button isn’t showing, check which elements have not been scored (those with a red line at the right side of the form/screen). Once there are no red lines, the “Submit” button will appear.

5. Duplicating a Status Determination



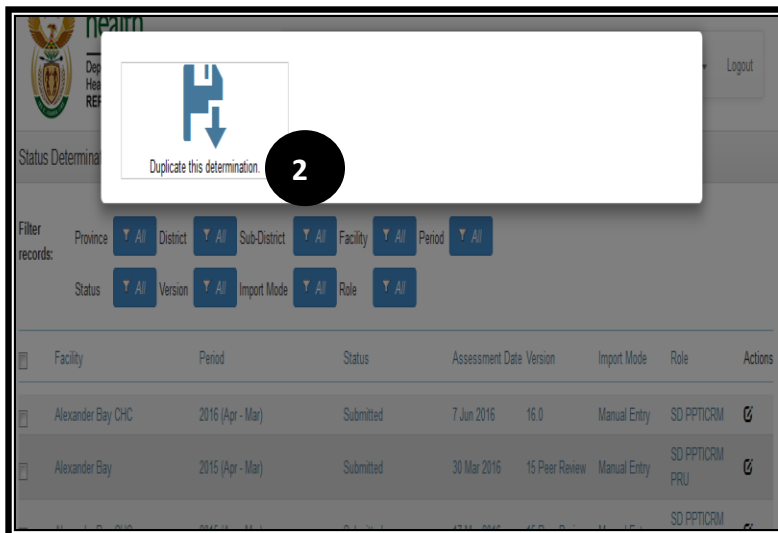
Status Determinations

Filter records: Province District Sub-District Facility Period Status Version Import Mode Role

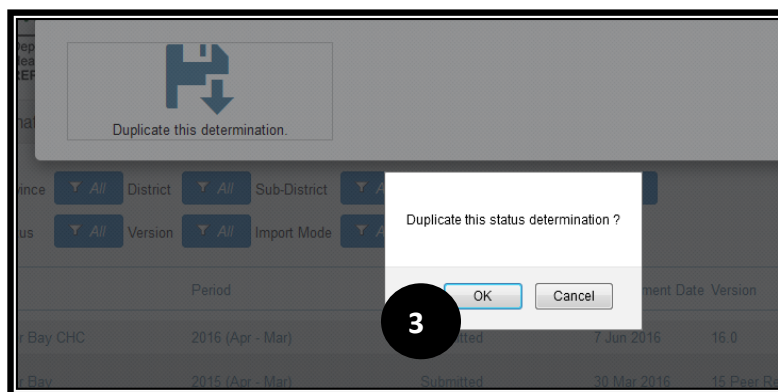
Facility	Period	Status	Assessment Date	Version	Import Mode	Role	Actions
Alexander Bay CHC	2016 (Apr - Mar)	Submitted	7 Jun 2016	16.0	Manual Entry	SD PPTICRM	
Alexander Bay	2015 (Apr - Mar)	Submitted	30 Mar 2016	15 Peer Review	Manual Entry	SD PPTICRM PRU	
Alexander Bay CHC	2015 (Apr - Mar)	Submitted	17 Mar 2016	15 Peer Review	Manual Entry	SD PPTICRM PRU	

Retrieve the status determination that you want to duplicate, see section 3

1. Click on the edit option to duplicate on the far right hand side next to the facility that you want to duplicate a SD for.



2. A prompt box will appear. Click on the option “Duplicate this determination”



3. A prompt box will appear. Click on the option “Duplicate this determination”

Status Determinations

Filter records: Province District Sub-District Facility Period

Status Version Import Mode Role

Records 1 to 15 of 59474

<input type="checkbox"/>	Facility	Period	Status	Assessment Date	Version	Import Mode	Role	Actions
<input type="checkbox"/>	Kloof Clinic	2020 (Apr - Mar)	Duplicated	16 Mar 2021	19.0 - Clinic	Manual Entry	SD PPTICRM	<input type="button" value="Edit"/>
<input type="checkbox"/>	Kloof Clinic	2020 (Apr - Mar)	Duplicated	16 Mar 2021	19.0 - Clinic	Manual Entry	SD PPTICRM	<input type="button" value="Edit"/>

4. Refresh the page or if you have access to more than one facility/multiple SDs are displayed on the capture page, type the name of the facility that you have duplicated in the search box and click on the “Search” button. The SD that was duplicated will show in the list with a status of “Duplicated”.

Status Determination

Details

Facility: Alexander Bay CHC

Date Visited / Status Determination Date: 2016-06-17

Date of Previous Visit: 2016-06-07

Changes implemented as a result of previous visits

Status Determination Version: 16.0

Status Determination Role: SD PPTICRM

Assessors: SR D LANGEVELDT, SR C CARSTENS

Telephone Number: 0278311986

Clinic Staff met during Visit: SR J. PAYNE, SR M LANDREW

Sub Components/Sections

5. Click on the SD with the status of “Duplicated”. The SD will then open in a ‘Saved’ status. Note that the **date will automatically default to the current date; change this if needed** as well as other information on the ‘Details’ section of the form i.e. Assessors, SD role, Telephone Number and Clinic Staff met during Visit. **Verify that all the information on the ‘Details’ section is correct before you select the ‘save’ button as you will not be able to edit this information once you have ‘saved’ the SD.** You can then update the elements on the SD where improvements were made. Once you have completed all the updates, select “submit”. Remember to save at regular intervals!