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### Requesting User Accounts and Login Details

User accounts to access the software must be requested by completing a user account request form, see [Annexure A](#). Once completed the **signed form and Excel file** must be submitted to [idealclinic@health.gov.za](mailto:idealclinic@health.gov.za).

**Note:** Each province designated specific staff members that may submit the signed user account forms. Forms not submitted and signed by the designated staff can not be processed.

<table>
<thead>
<tr>
<th>Requesting user accounts</th>
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<tbody>
<tr>
<td>Hi,</td>
</tr>
<tr>
<td>Please use the following details to login to the Ideal Clinic Monitoring System:</td>
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<tr>
<td><strong>Link:</strong> <a href="http://idealhealthfacility.org.za/">http://idealhealthfacility.org.za/</a></td>
</tr>
<tr>
<td><strong>USERNAME:</strong> tsoanelo</td>
</tr>
<tr>
<td><strong>PASSWORD:</strong> h?6WCHP*</td>
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Upon creation of a user account the registered user will receive an email containing their login details and a URL ([https://www.idealhealthfacility.org.za](https://www.idealhealthfacility.org.za)) to the system.

<table>
<thead>
<tr>
<th>Home Page</th>
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<tbody>
<tr>
<td>Clicking on the URL will direct users to the home page</td>
</tr>
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</table>
(1) Enter the Username and temporary password received on the e-mail received with login details.

(2) For security purposes, you will be required to change your password and the system will require a new password to be inserted twice. The password must have at a minimum 8 characters. The password must have 1 UPPERCASE, 1 lowercase character and a numeric character or special character.

Note: User accounts that have not been accessed for three consecutive months will be disabled.

(2a) Users that did not receive an e-mail with login details/forgot their password, can request new login details by entering their e-mail address in the box provided under the section “Recover Lost Password” on the login page. Select the “Reset Password” button after the e-mail address has been entered.

(2b) Users that have an account will receive a message “A new password has been sent to your e-mail address”.

(2c) Users that do not have an account will receive a message “No account for this e-mail address”. In such cases the user must contact the provincial or district Ideal Hospital coordinator.
CREATE A NEW ASSESSMENT

(3) The first step is to create an Assessment. Click on the Data management tab. To capture a new Assessment for a hospital, click on Hospital Assessment.

(4) Click "new" to open a new assessment.
Enter Assessment Details

A form will open. Complete the following on the form:

(5a) **Facility:** Select the Facility by typing in the first few letters of the facility in the box provided. Click on the facility. **Note:** If you have permissions for only one facility, only that facility will display from the drop-down list.

(5b) **Version:** Select the version from the drop-down list.

(5c) **Start Date:** Click in the box provided, a calendar will appear. Select the start date from the calendar. The end date will auto generate once all the areas have been completed.

(5d) **Required Areas:** At this section all the Area Sections with the Areas are selected by default. **Deselect the Area Section/Area which is not applicable** to your hospital by clicking on the box provided next to the name of the Area Section/Area. In the example the Area for *Chronic Ambulatory Health Services* has been deselected.

**NOTE:** The user will only be able to capture the Area Section/Area that were selected during the set-up for the new assessment.

(5e) Once the form has been completed, **Click Save**.
(5f) The user will return to the main capture screen; a message will appear “Assessment created. Once an assessment has been opened the areas for the assessment must be selected by selecting the magnifying glass, see section 8.

(5g) NOTE: There can only be a single active assessment at any given time, if you create a new assessment with a previous one still active, you will receive an error message.

(a) Use the dropdowns to filter the assessments that were already captured.

(b) Use the search box to type the Facility name to search for the facility assessment if required.
Functions of the ‘Actions’ section

(6a) Various areas, e.g. Medical Ward, Isolation Facility etc. must be captured on the assessment that has an “In Progress” status. Click on the Magnifying Glass on the main capture screen, see section 8, to select or open an Area to capture data for.

(6b) This icon is used to duplicate the assessment.

(7a) Use “Duplicate This Assessment”, see point 6b above to create a duplicate version of the selected Assessment. A copy of the “Complete” assessment will open in an editable assessment “In progress” with all the scores added in of the “Complete” assessment. Hospitals can then just update the scores which require updating and therefore do not have to re-enter all the scores.

NOTE:

- Assessment ‘Status’ must be “Complete” before an assessment can be duplicated.
- The user will be required to complete all the areas on the assessment that were selected when the assessment (which were duplicated) were created. Thus, if all the areas were completed, all 36 areas must be completed before an assessment will show a ‘Complete’ status. If the user wants to complete fewer areas a new assessment must be created.
The second step after having created the Assessment is to add areas to the Assessment.

(8a) The capture screen for the areas will open after the magnifying glass on the Assessment has been selected; refer to point 6a, page 5. To add a new area on the assessment, click the "New" button on the Area form.

(9) A screen will open where the areas can be added. Select the "Area" to be created by clicking in the text box named "Area". A drop-down list will appear, select the radio button next to the area you want to create. Once selected the name of the area will appear in the text box. **NOTE:** The user will only be able to select the Areas that were selected during the set-up for the new assessment that were created in section 5.

(10a) Write a description of the Area that will be created, this is optional.

(10b) Select the date that the area will be assessed.

(10c) Click "Create". The list with elements to be assessed for the area will open, to capture scores, refer to section 13.
Edit an existing Area

(11) Click “In progress” to edit an existing Area.

All the areas that have been selected will be listed on the capture screen for the areas.

Delete an Area

(12a) Users can only delete an area, if the area, is not marked as “Complete”. Select the icon with a pencil in it.

(12b) A pop-up screen will appear “Delete Area”, select the text name “Delete Area”.

(12c) Another pop-up will appear asking the user “Permanently remove the Result?”, select “Ok”. A message will appear if the user wants to delete or revert an Area that has a “Complete” status, the user must send an e-mail to idealclinic@health.gov.za indicating the name/s of the areas that must be reverted/deleted.
(13) The elements for the area created will display once an area has been created, refer section 10c or an existing area can be edited, refer section 11.

Answers the questions for each element by selecting Y/N/NA

(14) Provide comments where required

(15) If the question is not answered or is only partially answered, the red bar will be visible to indicate an incomplete element or checklist.

**NOTE:** If the answer to an element is N/A (Not Applicable), a comment is required.

(15a) Click Yes/No/NA to answer checklist questions

(15b) Select ‘Close Window’ to close the current checklist screen.

You will be redirected to the “Area Results” screen to allow you to answer the remainder of the elements.
Area details and saving/submitting/closing form.

(16a) This area shows you details about the currently opened area, including how many questions are in the form, how many have been answered and how many unique “Areas” have been completed.

(16b) Once the form has been completed, the “Save” button must be selected to save answers on the current form for later completion.

(16c) Once the “Area” form has been filled in completely, and the information has been saved, you can click submit to send the information to the next level for approval/verification.

(16d) The close button can be used to close the form and go back to the assessment screen (4).

(16e) Used to open the audit log which allows users to see screenshots of the previous answers and changes.

Note 1*: A forms answers can be saved at any time, the system will allow the user to return at anytime to complete the form.

2 out of 56 questions answered.
Please answer all the questions before submitting the area.

Note 2*: A user can successfully submit the area once all the elements and checklists in an area have been completed, otherwise a message will show how many questions are left to be answered.

(16a.1) 16a.1

Human Resource management

Laundry

Obstetric

Obstetric

[Image above]
Note 3*: If there are duplicate areas (Areas with the same name) (16a.1), then when a single duplicated area is completed (Unique Area Name 1), it will count as 1 unique area completed (16a). If the rest of the areas with the same name (Duplicated Area Name), are completed after the first duplicate area. Refer to the note at the bottom of page 12 regarding number of required areas to be completed before a report is viewed as “Complete”.

Note 4 a*: Once you’ve edited an element or checklist and did not select the “Save” button, a warning message will be displayed to warn the user that the user has not saved their answers.

Note 4 b*: If the close button is clicked and information has been changed and not saved, there will be a confirmation pop-up, to close without saving the information, if ok is clicked the form will close and revert to the previous, unchanged information.
**Audit Log**

- **(17a)** Shows the date when a change was made.
- **(17b)** Shows the user that made the change.
- **(17c)** Shows what the value changed from (Old Value) to (New Value).
- **(17d)** The magnifying glass is used to show the previous form/element and checklist answers in a read-only format.
(18) Each area after having completed it must be moved from capture status to approve.

- Select from the status box to submit to Quality Assurance, Hospital Manager/Chief Executive Officer of the hospital
  - the Hospital Manager/Chief Executive Officer of the hospital will be allowed to change the status of the form to completed or will revert the status back to “In progress”/“to data capturer/QA” if there is incorrect information that must be edited by selecting from the drop-down at the “Status” text box the “return to data capturer/QA” option.
- Select from User field the user who will perform the quality check.

An area can only be submitted to the next level once all the elements have been scored.

Note: The number of areas that must be completed in order for an Assessment to have a “Complete” status is dependent on the areas that were selected when the assessment was created, see Section 5.
Explanations of the area status meanings in Section (8b).

(18a) The “In progress” status, shows the user that the specific area is still “In progress” and has not been completed yet.

(18b) The “Returned To Data Capturer” status, shows the user that the area assessment has been previously completed and sent to a “Quality Assurance” personnel or a “Hospital Manager” and sent back to the Data Capturer, incorrect data.

(18c) The “Submitted To Quality Assurance” status, shows that the data-capturer has completed the area assessment from “In Progress” or “Returned To Data Capturer”.

(18d) The “Returned To Quality Assurance” status, shows that the area assessment has been submitted to the “Hospital Manager”, but the Hospital Manager was not certain about a certain element of the assessment or there was incorrect information.

(18e) The “Submitted To Hospital Manager” status, shows that the completed area assessment has been sent to a Hospital Manager for review, by either a Data Capturer or Quality Insurer.

(18f) The “Completed” status, shows that the area assessment is completed. 

Note: Once an area has a “Complete” status, the area can not be edited, if an area needs to be reverted back to “In Progress” or deleted, an e-mail must be sent to.
**GENERATE REPORTS**

(19) To generate a report, click "Reports"

- Clinic Reports
  - Waiting Times
  - Facility Profile
- Hospital Reports
- Patient Safety
- CCS: Monthly Sign-Off sheet
- Complaints
- Compliments
- Suggestions
- DG Report

(20) Click the Hospital Reports button from the drop-down menu.

(21) Select a report from the Hospital Reports screen.
Hospital: Facility Report

Purpose of the report: Generate a report with detailed scores for the facility

Note: The hospital must have a “Complete” assessment before the hospital’s name will appear on the drop-down list to select at the filter named “Facility”.

(22) Select the facility you want to generate a report for at the filter named “Facility”. There can only be 1 Assessment selected at a time to generate a report.

A list of all the reports for the facility will appear. Click on the radio button to the left of the facility name to select which report you want to generate.

(23) Select the ‘Generate Report’ button to generate the report.

(24) The report will take a few minutes to generate, select the “Refresh” button under the section named “Scheduled Reports” after a few minutes. Once the "Download" icon shows under the “Action” section, then click the "Download" icon to download the report in Excel format.

(25) Select the ‘Delete’ button if you want to delete previously generated reports.
**Hospital: Quality Improvement Report**

**Purpose of the report:** The report generates a template to complete a quality improvement report on by listing all the elements and measures on the checklists that were failed by the facility.

(26a) Takes the user to the dashboards page.

(26b) Use the reset button to reset the filters.

(26c) These filters are used to filter the result to specific data.

(26d) Once the data has been filtered to specific reports, the report can be generated.
Hospital: Query Tool

Purpose of the report: The report generates a ‘dump’ of the data which can be used by data analysts to obtain data that is not available on the standard reporting formats of the information system.

(27a) Reset button used to reset the filters to select all data.

(27b) Filters are used to get specific data.

(28a) These are the fields that are available to be exported in the report.

(28b) These are the fields that will be exported when the export button is clicked.

(28c) These buttons are used to move all available fields from the (a) to (b), or from (b) to (a).

(28d) These buttons are used to move single or multiple fields from (a) to (b) or (b) to (a) at a single time.

(28e) The close button can be used to close the query tool and take the user back to the home page.

(28f) The export button is used to export data with the selected fields in (b) to a zip file.
(29a) Once the checkbox is selected, the delete button can be used to delete the record of the download.

(29b) The refresh button can be used to refresh the records and details, used when the record is being generated, it may take time and the refresh button is used to see if the report is ready to download.

(29c) Once the "Download" icon shows under the "Action" section, then click the "Download" icon to download the report. The report will download in a zip file.

Hospital: Facility status Report

(30a) Purpose of the report: The report generates a list of all the hospitals (according to the user’s permissions) with the average scores for vital, essential, important and average global score with the status (ideal category).

(30b) Use the filters to select the financial year you want to generate the report for.

(30c) The filters under the ‘Element structure Filter’ can be used to filter to obtain results for specific areas, components, sub-components and elements.
Hospital: Progress on Areas Submitted Report

(31a) **Purpose of the report:** The report generates a list that indicates the status of all the areas selected for the hospital. This is to guide staff to track the progress made with capturing of the assessment.

(32a) **Use the filters to select the financial year you want to generate the report for.**

**Note:** The most advanced status of the area will be colour coded if more than one area with the same name has been captured. For example if two areas for “Medical Ward” have been captured, one is “in progress” and one has been “Completed”, the area will be coloured green. The number of each Area that were opened is also indicated. Refer to the note at the bottom of page 12 regarding number of required areas to be completed before a report is viewed as “Complete.”
(33a) **Purpose of the report:** The report generates a list of all the hospitals (according to the user’s permissions) with the score per element for each hospital.

<table>
<thead>
<tr>
<th>Component</th>
<th>Sub Component</th>
<th>33a</th>
<th>33b</th>
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</thead>
<tbody>
<tr>
<td>Elements</td>
<td>1. Signage and notices: Monitor whether there is communication about the facility and the services provided</td>
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<tr>
<td></td>
<td>1. Geographical location signage from main roads in place</td>
<td>0.75</td>
<td>0.25</td>
</tr>
<tr>
<td></td>
<td>2. All external signage in place</td>
<td>0.75</td>
<td>0.25</td>
</tr>
<tr>
<td></td>
<td>3. Facility information board visibly displayed at the entrance of the premises</td>
<td>0.75</td>
<td>0.25</td>
</tr>
</tbody>
</table>

(33b) Use the filters to select the financial year you want to generate the report for.
**Hospital: Dashboards**

(34) The dashboards can be accessed by selecting the ‘Dashboards’ tab from the main menu bar. The dashboards display data in graphs for ease of interpretation.

(35) Each dashboard has a set of filters that can be used to filter to obtain data for a specific district/sub-district/facility/facility type/financial period.

**Hospital: Data Submission**

(36) **Purpose of the dashboard:** The dashboard displays the number of completed assessments that were submitted.
Hospital: Facility Comparison Dashboard

**Purpose of the dashboard:** The dashboard compare the data per province/district/sub-district.

Hospital: Ideal Hospital Categories Dashboard

**Purpose of the dashboard:** The dashboard display the number of hospitals that obtained an Ideal status.

Hospital: Outcome

**Purpose of the dashboard:** The dashboard display the performance of hospitals per component and compare the performance per province/district/sub-district.
PRINTING A BLANK ASSESSMENT FORM

**Print an Assessment**

**(40a)** Go to the “Data Management tab”. Select the “Hospital Assessment tab”. If you have an existing assessment, open it by clicking on the magnifying glass. If you do not have an existing assessment, select the “New” button **(40b)** to open a new assessment, and then open the “assessment” by clicking on the magnifying glass.

**(41a)** Open the “area” required for printing purposes by clicking on the area. The full list of questions for that area will display **(41b)**. **Note** if you have not opened the area you want to print, select the “New” button **(41c)** and select the area you want to print by clicking the radio button **(41d)**. Select the “Create” button **(41e)**.
(42) Find the Default Browser print feature (depending on the browser of your choice - this example was done using Google Chrome)

(43) Click Print. The measures for the area will print. **Note:** the detailed measures for the checklists for the area must then be printed by following section 42.

---

In order to print a Checklist, follow steps (40) to (41) then;

(44) Open the Checklist you want to print by clicking on the relevant Checklist measure Icon

(45) A checklist popup will display along with the option to Print. Select the “Print” button to print the area.
Annexure A: User account request form for Ideal Hospital Realisation and Maintenance

NATIONAL DEPARTMENT OF HEALTH: FORM TO REQUEST USER ACCOUNTS TO ACCESS IDEAL HOSPITAL REALISATION AND MAINTENANCE MODULE

NB: Complete the form electronically, save and print it (check that content is printed on one page, each page must be signed). Sign the document and scan the signed copy (must be signed by staff member as designated by the Provincial Office). E-mail both the electronically completed ‘Word’ document as well as the signed scanned copy to idealclinic@health.gov.za

<table>
<thead>
<tr>
<th>No</th>
<th>Title</th>
<th>First Name</th>
<th>Surname</th>
<th>E-mail address</th>
<th>View</th>
<th>Capture</th>
<th>Authorise QA</th>
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Authorised by:

Name and surname ________________________________

E-mail address: ________________________________

Designation ________________________________

Signature ________________________________

Date ________________________________