COMPLAINT, COMPLIMENT AND SUGGESTION MANAGEMENT

Training manual for web-based information system

February 2018

health
Department:
Health
REPUBLIC OF SOUTH AFRICA

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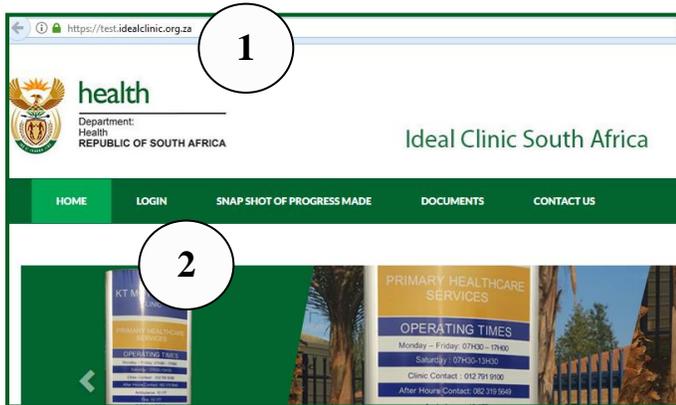
1. Log in

1. Go to the Chrome browser and type in https://www.idealclinic.org.za in the URL box and press Enter on the key board.
2. Select the 'LOGIN' tab.

   Note: the test site for training is available at https://test.idealclinic.org.za. The generic login details are:
   Username: TestAccount
   Password: Password789

   Note: the preferred web-browser to use is Chrome
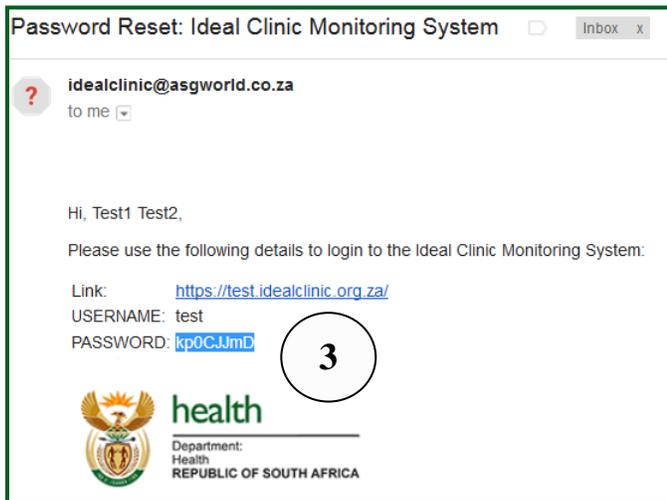
3. Retrieve the e-mail that was sent to the user upon creation of his/her user account. The username and temporary password of the user is indicated on the e-mail.

Ideal Clinic Monitoring System

HOME | LOGIN | SNAP SHOT OF PROGRESS MA

Account Login

Username
Password

Login (5)

(4)

Recover Lost Password (6) (7)

Email Address

Reset Password

- ⬇ Download account request form
- ⬇ Download summary account request form

A new password has been sent to your email address (8)

No account for this email address (9)

Change your password

| Username	TestAccount
Password	
Repeat Password	(10)
Title	Ms

4. Enter the username and the temporary password that was e-mailed to the user in the text boxes provided.
5. Click on the 'Login' button. **Note:** it's best to copy the password from the e-mail and paste it in the 'Password' box to prevent typing errors.

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

6. Enter the e-mail address that was used to create the user's user account in the text box named 'Email Address' under the section for "Recover Lost Password" .
7. Select the 'Reset Password' button.
8. A message will appear stating: "A new password has been sent to your email address". The user will then receive an e-mail with a new password.
9. If the account does not exist or the e-mail address was mistyped a message will appear stating "No account for this email address". Contact the provincial or district coordinator to assistance the user to apply for a user account.

10. When the user log on for the first time, the user will be prompt to enter his/her own password twice. **Note: the password must have 1 UPPERCASE, 1 lowercase character and a numeric or special character**

2. Capture a complaint, compliment or suggestion record
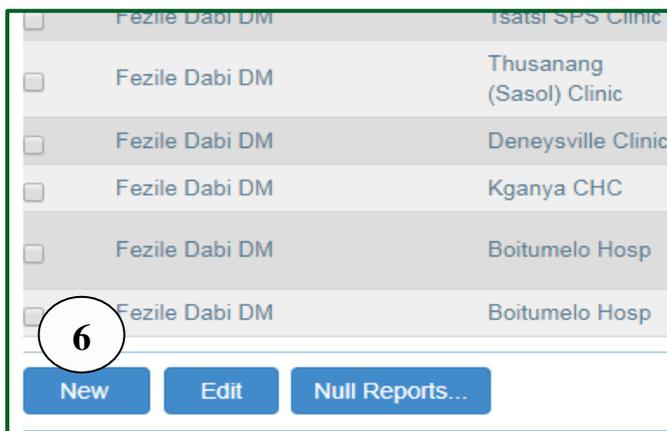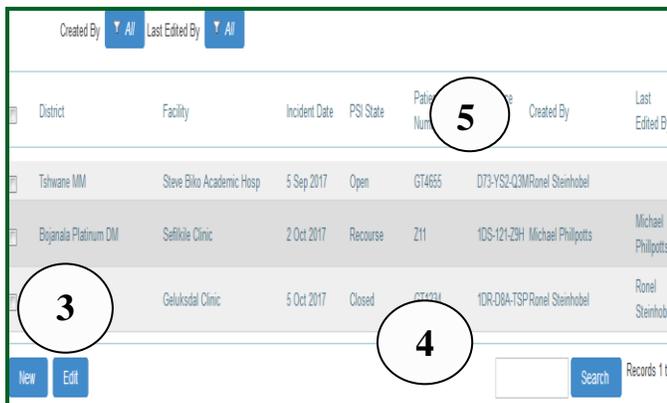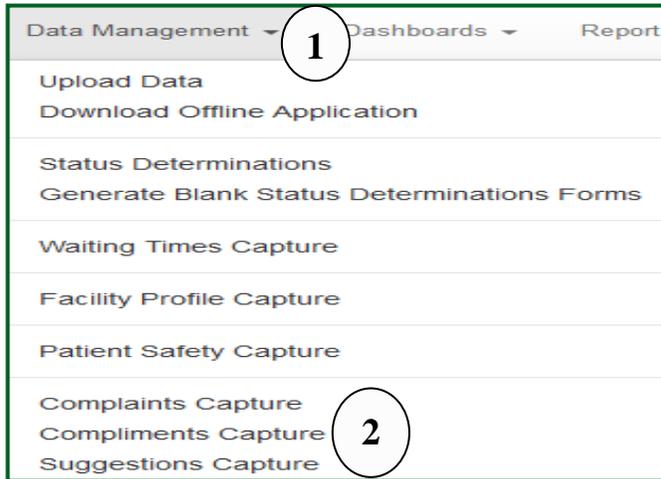
1. Go to the 'Data Management' tab.
2. Select one of the three options depending on what the user want to capture, i.e. 'Complaints Capture, Compliments Capture or Suggestion Capture', that will direct the user to the capturing screen.

Note: The options under the drop-down of the 'Data Management' tab will look different for every user at it depends on the permissions that are assigned to the user's account. If the user for example only have permission to capture complaints, compliments and suggestions only those options will be displayed.

There are **3 functions on the home screen to capture complaints, compliments and suggestions**, i.e.:

3. Creating a new record for a complaint, compliment or suggestion
4. Search for an existing complaint, compliment or suggestion that has already been captured.
5. Do a look-up according to the staff member that has captured the complaint, compliment or suggestion record or who last edited the complaint record.
6. **To capture a new** complaint, compliment or suggestion record, click on the '**New**' button at the left bottom corner of the screen.

Note: the process to capture a complaint, compliment or suggestion is similar and will therefore be described in one section using the complaint capture screen as example.

The form to capture a complaint, compliment or suggestion will open; see **Annexure A to C**.

7. The system will generate an automated reference number to track each complaint/compliment/suggestion.

8. Click on the magnifying glass to select the facility name that the user wants to capture a complaint, compliment or suggestion for.

9. A screen will pop-up showing a list of facilities that the user has permissions to capture for. Select the facility from the list that appears by clicking on the radio button to the left of the facility name that the user wants to capture a complaint, compliment or suggestion for.

10. **Note:** If the facility the user wants to capture for does not appear on the list, type the first four letters of the facility in the 'Search' box and select the 'Search' button, then follow point 9 and 11.

11. Click the 'Select' button. The user will then be returned to the capturing form.

12. The name of the facility will appear in the box next to "Facility" once the "Select" button referred to in point 11 has been selected.

13. Select the date the complaint, compliment or suggestion occurred. Click in the text box next to the field named 'Complaint Date', a date calendar will appear. Click on the date the complaint was lodge.

14. If the user wants to go to previous months, click on the arrow next to the month.

Note the following:

15. Fields with dropdown values are indicated with an arrow, click on the arrow and select the appropriate value from the drop-down list by clicking on the value.

16. If the complainant's name, surname and contact details are the same as the Patient's details (where the patient is the complainant), select the tick box next to the field named 'Same as Complainant'; the information will then be auto filled into the Patient's Details section.

17. Multiple classes can be selected at the 'Category for Complaint', 'Category for Compliment' or 'Category for Suggestion' by clicking in the box next to the category.

18. If the category named 'other' is selected an additional text box will open where a short description of the type of complaint (limited to 35 characters) must be entered into the box named 'Please specify the Category'.

19. The field named 'Received From' contains a default value of 'Facility'. If the complaint was not lodged at the facility, select the area where the complaint was received from, from the drop-down value.

Complete all the fields on the form.

Note: Not all fields are compulsory to complete, but some are.

20. All fields marked with a **red asterisk** are compulsory to complete.

21. If these fields are not completed an error message will appear upon save with instructions on which fields must still be completed. The fields will also be highlighted in red on the form once the pop-up box displaying the error messages has been closed.

22. All fields marked with an **orange asterisk** are compulsory to complete once the "Date Resolved" has been selected.

23. Once all the fields marked with a red asterisk have been completed, select the 'Save' button.

24. A pop-up message will appear 'Complaint has been saved'.

25. Select the 'Close' button to return to the capturing screen.

26. If the form is closed without having selected 'Save' a pop-up message will appear to prompt the user to 'save'. **Note:** If the form is closed without having selected 'save' the data will be lost!

27. Once the investigation has been finalised the user can go back to the form and look-up the complaint (see points 28 to 31 on the next page) to edit it. Once the '**Date complaint closed' has been selected** a pop-up screen will appear if once the 'Save' button is selected. A message will appear requesting the user to save the form. Select the 'Confirm' button, the form will be 'locked' and cannot be opened again for editing (unless the user has administration permissions).

To Search for an existing complaint, compliment or suggestion record that does not appear on the main capturing screen after the option 'Complaint Capture' was selected from the drop-down list under the 'Data Management' tab.

28. Type in the reference number, or name or surname of the complainant in the search box on the main screen.

29. Click on the search button. The record will then show on the screen.

30. Click on the tick box next to the facility the user wants to edit

31. Select the 'Edit' button or double click on the facility's name.

32. The completed complaints form can be downloaded in Excel format by clicking on the 'Download Form' icon on the capturing screen for complaints.

33. The completed form for the complaint, compliment or suggestion will open in Excel format, see **annexures A to C.**
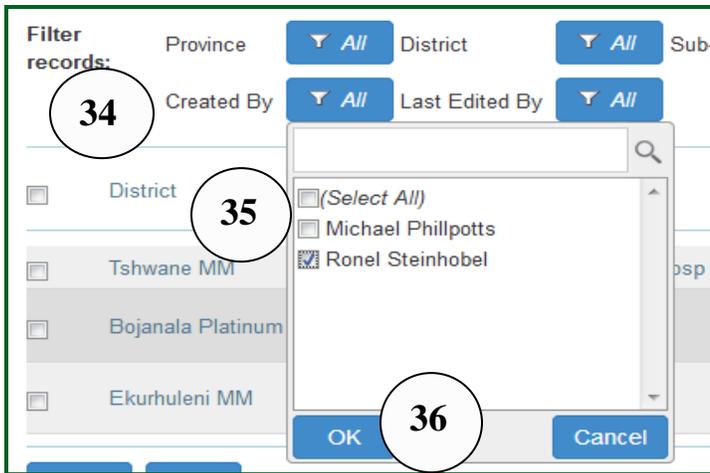
To do a look-up according to the staff member that has captured the complaint, compliment or suggestion record or who last edited the complaint record: Go to the filter on top of the home screen where complaints, compliments and suggestions are captured.

34. Click on the filter named "Created By" or "Last Edited By".

35. Click on the text box next to 'Select All' to first deselect all the names, then click in the tick box next to the name to filter for the complaint/ compliment/ suggestion record captured by a specific staff member.

36. Click on the "OK" button, only the complaints/compliment/suggestion that was captured by the staff member that was selected will now display on the home screen of the capture form.

3. Capture a 'Null Report' for complaints
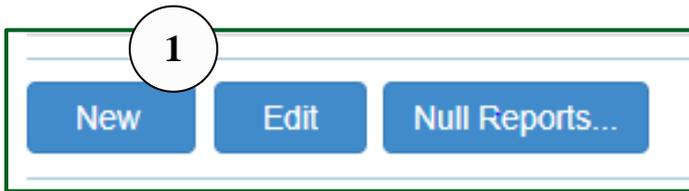
If a facility did not have any complaints for a specific month, the facility must capture a 'Null Report' for that specific month for complaints only (this is not required for compliments and suggestions as these are not indicators).

1. Select the button named 'Null Reports' at the bottom of the capturing screen for complaints.
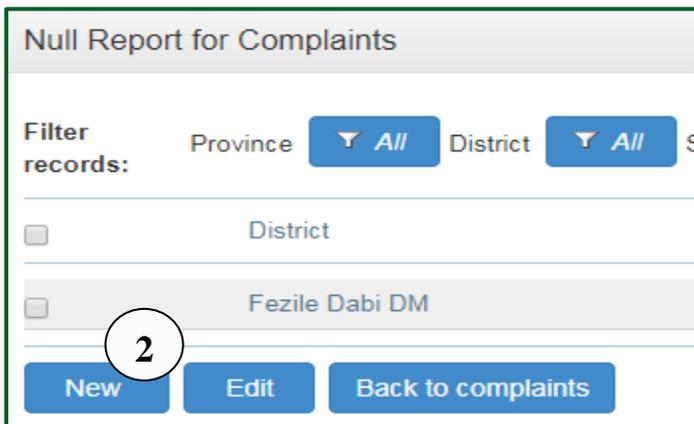
2. The screen to capture a null report will open. Select the 'New' button
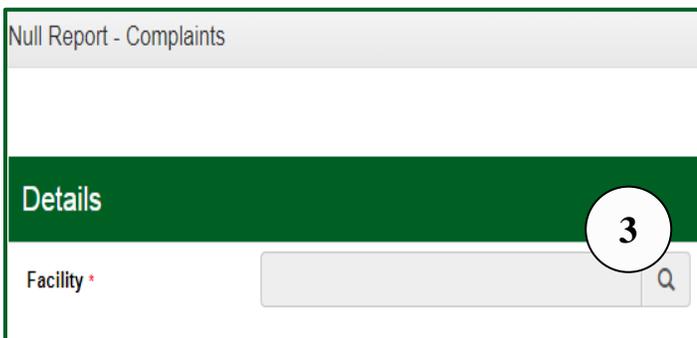
3. The form to capture a Null Report will open. Click on the magnifying glass to select the facility name that the user wants to capture a null report for.

4. A screen will pop-up showing a list of facilities that the user have permission to capture for. Select the facility from the list that appears by clicking on the radio button to the left of the facility.
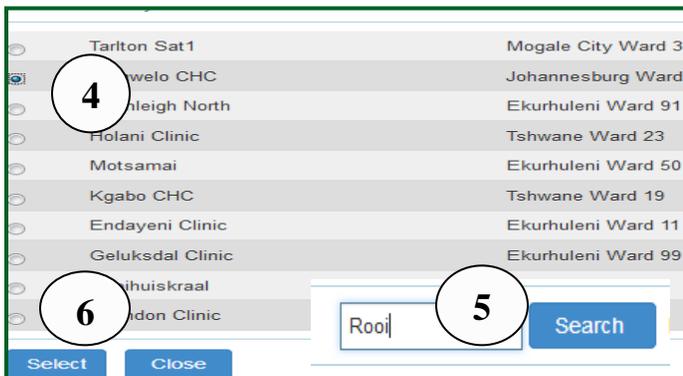
5. **Note:** If the facility the user wants to capture for does not appear on the list, type the first four letters of the facility in the 'Search' box and select the 'Search' button, then follow point 4 to 6.

6. Click the 'Select' button. The user will then be returned to the main capturing form to capture a Null Report.

Null Report - Complaints

Details

⑦

Facility *	Tokollo Hosp

7. The user will be returned to the capturing form for Null Reports, the name of the facility will now appear in the box next to "Facility" once the user has selected the "Select" button.

Period (Year-Month) | |

⑧

| « | **January 2018** | » |

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13

8. Click in the text box of the field named "Period (Year-Month)". A calendar will appear. Select from the date calendar any day within the month that a Null Report must be recorded for.

Period (Year-Month) | 2018-01

⑨

Save

9. Select the 'Save' button.

Are you sure you want to save the form (Please note that the from will be locked down)

⑩

OK | Cancel

10. A pop-up box will appear 'Are you sure you want to save the form'. Select 'OK'.

Null Report - Complaint

⑫

⑪

Null report has been saved. | Close

11. Another pop-up box will appear 'Null report has been saved'.
12. Select the 'Close' button.

Null Report for Complaints

Filter records:	Province	▼ All	District	▼ All

| ☐ | District |
| ☐ | Capricorn DM |

⑬

New | Edit | Back to complaints

13. The system will return to the capture screen for Null Reports. Select the 'Back to Complaints' button to return to the capture screen for complaints.

4. Delete or re-open complaint, compliment or suggestion record
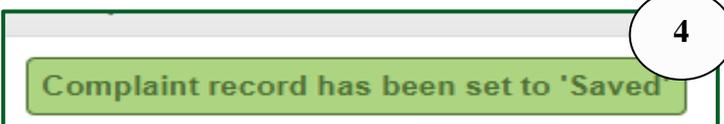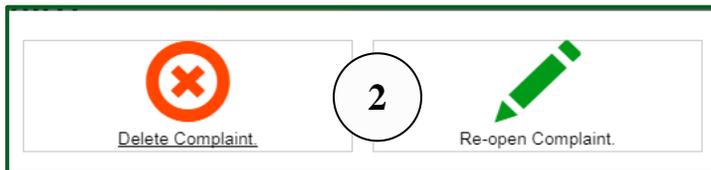
Note: only account holders that have permission to delete or re-open a closed complaint/compliment/suggestion record can delete or re-open a complaint/compliment/ suggestion.

Note: If the record the user want to re-open or delete do not appear on the main capturing screen, look-up the record, see page 8, points 27 to 30.

1. Once the record on the home capturing screen has been located, click on the icon next to the facility that has a pencil in it to re-open or delete the record.
2. A pop up screen will appear with an option to delete or re-open the form, select one of the options depending on what the user want to do.
3. If the user select 'Re-open Complaint Report', a pop-up message will appear to confirm whether the user want to open the record. Select 'OK'.
4. A message will appear at the top of the screen "Complaint record has been set to 'Saved'. The form can now be edited again.

5. If the user select "Delete" at point 2, a pop-up message will appear to confirm whether the user want to 'Permanently remove this Complaint Record', select the 'OK' button.

6. A message will appear at the top of the screen "Complaint record has been deleted".

5.1 Generate reports

Reports ▾ ①

Complaints: Register
Complaints: Statistical
Complaints: Compliance Report
Complaints: Aggregate Statistical Report
Complaints: Detailed Report

Compliments: Register
Compliments: Statistical
Compliments: Aggregate Statistical Report
Compliments: Detailed Report

Suggestions: Register
Suggestions: Statistical
Suggestions: Aggregate Statistical Report
Suggestions: Detailed Report

②

1. Select the drop down list under the 'Reports' section.
2. The list of all the available complaints, compliment and suggestion reports will appear.

Complaints: Register

Home   Reset

Province: ▼ All
District: ▼ All   ③
Sub-District: ▼ All
Facility: ④   ▼ All
Facility Type:
⑤   ⑥
NHI District: □ (Select All)
                 □ Boitumelo Hosp
Ownership: □ Deneysville Clinic
                 □ Kganya CHC
Year: 2017/18 ▼ □ Lesedi CHC
                 □ PAX CHC
Date Range: 01/08/2017   Location: □ Releb...il) Clinic
           16/01/2018
           OK ⑦   Cancel
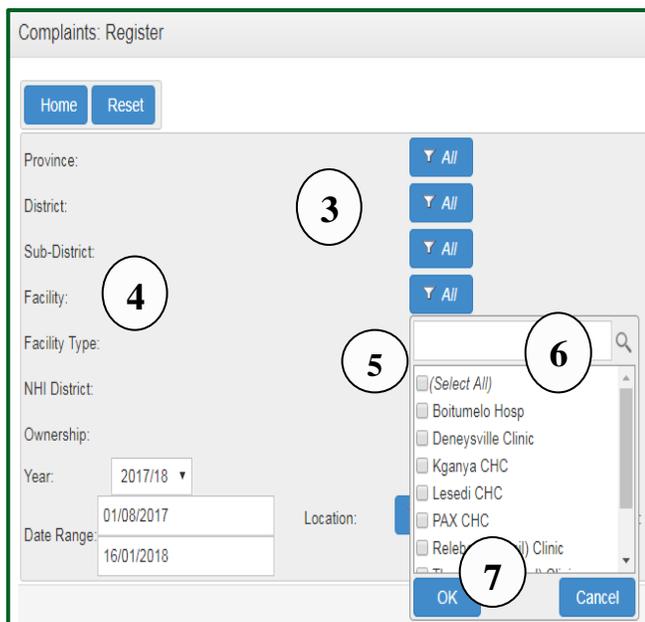
3. Various filters are available on the reporting section that can be used to generate reports with specific data on by selecting specific values from the filters, see functions of filters on page 15.
4. If the user wants to generate a report for a single facility, click on the filter next to the field named 'Facility'.
5. Click on the text box next to 'Select All' to deselect the facilities.
6. Type the first few letters of the facility in the search field, once the facility is visible, tick the box next to it.
7. Select the 'OK' button.

⑧

Close   Generate Report

powered by a[s]g
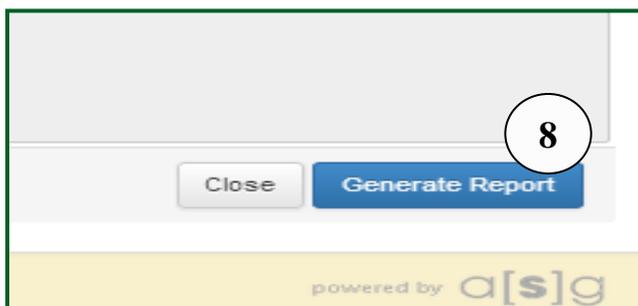
8. Select the 'Generate Report' button

9. The report will generated in Excel format the report for the facility that was selected. Depending on which browser is used the report will either open with a pop-up box that display a request to open the file or the file can also appear in a pop-up box at the bottom or top of the browser.

5.1   Functions of the filters on reports

Use the filters on the report section to generate specific data for complaints/compliments/ suggestion.

The functions of the filters are as follow:

- **District/sub-district/Facility:** If the user wants to generate aggregated data per district or sub-district, select the specific district or sub-district from the filter before generating the report. Note that if the permissions of the user account of the staff member are set to capture and generate reports for only one facility the user do not need to select any filter at the filter named 'Facility', the report will by default only generate data for the facility. If the permissions of the user account of the staff member are set to capture and generate reports for sub-district, district and provincial level, the report will generate collated data according to the user's permissions. For example is the user has permission for a province, the reports will generate by default a collated report for all the facilities in the province. If this user want to generate data for example for a specific district, select the specific district from the drop-down value from the filter.

- **Resolved:** If the user wants to generate a register to follow-up on unresolved complaints, go to the report named 'Complaints: Register' select at the filter named 'Resolved' the option 'No'. The register will then display all the unresolved complaints so that the user can follow-up on the unresolved complaints.

- **Location:** If the user only wants to generate a report for a specific area in the health facility, select the specific location from the drop-down values at the filter named 'Location'.

- **Year:** If the user wants to generate a report for a specific financial year, select from the drop-down values the financial year for which the user wants to generate the report for.

- **Ownership:** If the user wants to generate a report for facilities owned my local or provincial government, select the specific option from the drop-down values on the filter.

Table 1: Functions of the complaints/compliment/suggestion reports

Name of report	Function
• Complaints: Register • Complaints: Statistical • Compliments: Register • Compliments: Statistical • Suggestions: Register • Suggestions: Statistical	The reports provide data for a specific facility, but depending on the permissions assigned to the user account it can also provide aggregated data per province/district/sub-district if a specific facility is not selected from the filter values. To generate data per province/district/sub-district, select the specific options from the drop-down values, see examples of how to select the filters on page 13, points 3 to 7.
• Complaints: Compliance Report	The report provides data on the number of facilities that have reported on the information system for every month per financial year, this will assist managers to follow-up on facilities that have not reported on the system. **Note1:** The report will by default enter 'Y' for 'Yes' under the month if a complaint was captured for that month by the facility. **Note 2:** Facilities that **did not have any complaints for a specific month must complete a 'Null report'** for the specific month, see page 10 to 11. Once the 'Null report' has been completed a 'Y' will automatically be entered on the 'Compliance Report 'next to the facility name when the 'Compliance Report' is generated. The 'Compliance Report' provide aggregated data per province, district, sub-district and facility level, each set out on a separate sheet in the Excel report, see below figure **Summary Prov** / Summary District / Summary Sub-District / Detailed per facility
• Complaints: Aggregate Statistical Report • Compliments: Aggregate Statistical Report • Suggestions: Aggregate Statistical Report	The reports provide detailed aggregated data per province, district, sub-district and facilities, each set out on a separate sheet in the Excel report, see figure below. **Summary Prov** / Summary District / Summary Sub-District / Detailed per facility
• Complaints: Detailed Report • Compliments: Detailed Report • Suggestions: Detailed Report	The report 'dumps' all the data fields that were completed on the complaints, compliment and suggestion forms into a table format.

See Annexure A: Complaints Capture Form

health
Department:
Health
REPUBLIC OF SOUTH AFRICA

Complaints Capture Form

Details

Facility:	Seshego Hosp	**Reference Number:**	1EA-P9O-QIF
Compliment Date:	2018-01-17	**Location of Complaint:**	Wards
Location Description:			

Complaints Detail

Complainant Details

Complainant First Name	Anna	**Complainant Postal Address**	10th Street 879, Roseville, Pretoria, 0084
Complainant Surname	Mahlangu	**Complainant Physical Address**	10th Street 879, Roseville, Pretoria, 0084
Complainant Cell Number		**Complainant E-mail Address**	anna.mahalangu@gmial.com

Patient's Details

Patient's First Name	Anna	**Patient's Postal Address**	10th Street 879, Roseville, Pretoria, 0084
Patient's Surname	Mahlangu	**Patient's Physical Address**	10th Street 879, Roseville, Pretoria, 0084
Patient's File Number		**Patient's E-mail Address**	anna.mahalangu@gmial.com
Patient's Cell Number			

Complaint Details

Summary of Complaint
The food was cold and not enough

Name of Call Taker		**Acknowledgment date** 2018-01-19
Manner in Which Complaint Was Lodged Written		**Date of Redress** 2018-02-02

Category of Complaint		
Staff Attitude		Access to Information
Physical Access		Waiting Times
Waiting List		Patient Care
Availability of Medicines		Safe and Secure Environment
Hygiene and Cleanliness	✔	Other

Please Specify the Category
Food Service

Risk Rating Medium		**Date Resolved** 2018-02-02
Information on Action, Outcome, Remedial Action Taken Complaint sent to Food service unit for investigation. Food service manager apolog		**Type of closure** Patient Satisfied/Redress Done
Received From Facility		**Number of Working Days (Auto Calculated)** 13
Complaint Ref Number of Referring Organisation		**Resolved** No
Referred To Higher Level		**Date for Review**

See Annexure B: Compliments Capture Form

health
Department:
Health
REPUBLIC OF SOUTH AFRICA

Compliment Capture Form

Details

Facility:	Alldays Clinic	**Reference Number:**	1E2-UMT-NXL
Compliment Date:	2018-01-30	**Location of Incident:**	Pharmacy
Location Description:			

Compliments Detail

Name and Surname (of person who recorded the compliment)
Hayley

Postal Address (of person who recorded the compliment)

Patient's Name and Surname
Unknown

Physical Address (of person who recorded the compliment)

Cell Number (of person who recorded the compliment)

E-mail Address (of person who recorded the compliment)

Summary of Compliment
short queue

Name of Call Taker

Manner in Which Compliment was Made
Physical Visit

Category of Compliment

	Staff Attitude		Access to Information
	Physical Access	✔	Waiting Times
	Waiting List		Patient Care
	Availability of Medicines		Safe and Secure Environment
	Hygiene and Cleanliness		Other

Action Taken
thanked patient

See Annexure C: Suggestion Capture Form

<table>
<tr><td colspan="4">

![health Department: Health REPUBLIC OF SOUTH AFRICA] **Suggestion Capture Form**

</td></tr>
</table>

Details

Facility:	Dikgale Clinic	**Reference Number:**	1EA-ATF-B1A
Suggestion Date:	2018-02-01	**Location of Incident:**	Pharmacy
Location Description:			

Suggestions Detail

Name and Surname (of person who recorded the suggestion)
Jimmy Masilela

Postal Address (of person who recorded the suggestion)

Patient's Name and Surname
Salomina Masilela

Physical Address (of person who recorded the suggestion)

Cell Number (of person who recorded the suggestion)

E-mail Address (of person who recorded the suggestion)

Summary of Suggestion
Assign a staff member to manage queues as the waiting time is very long

Name of Call Taker

Manner in Which Suggestion was Made
Written

Category of Suggestion			
	Staff Attitude		Access to Information
	Physical Access	✔	Waiting Times
	Waiting List		Patient Care
	Availability of Medicines		Safe and Secure Environment
	Hygiene and Cleanliness		Other

Category of Suggestion