IDEAL CLINIC PROGRAMME

Training module IV part IV for Ideal Clinic software

GENERATE DASHBOARDS AND REPORTS

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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. Clinic on it to redirect you to the Ideal Clinic website: https://www.idealclinic.org.za or you can access the site directly.

2. Select the ‘LOGIN’ tab

3. Enter your Username and the temporally 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.
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.

5. Click on Save to continue to the Homepage

6. A message will appear stating “Account details updated”
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”

10. If the account does not exist or you have mistyped your e-mail address a message will appear stating “No account for this email address”. 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 temporarily 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 “Account does not exist” therefore make sure you type in your password correctly.
2. Software Functionality

1. When you log onto the Online Ideal Clinic Monitoring Software you will see the Homepage. See the menu bar at the top for various functions, e.g. ‘Data management’, ‘Dashboard’ and ‘Reports’. The ‘Dashboard’ and ‘Reports’ section is used to extract data from the software for report writing.

![Dashboard Image](image1)

2. The functionality of the software lies within the various filters displayed at the top of each dashboard and reporting section. By selecting specific options at the filters specific data will be generated e.g for a province, district or facility. The filters for period, version, Status Determination (SD) and various other filters will allow you to further specify data that is generated.

![Filter Image](image2)
3. Generate Dashboards

1. Go to the 'Dashboard' tab on the toolbar of the Ideal Clinic software once you have logged in. Select the dropdown arrow.

Select the **General Overview dashboard**

2. When filtering a Province, District, Ward or Facility; the map will zoom to the selected geographical area.

3. As the map zoom in, more detail will appear. When you click on a facility, an option will come up that will allow you to view the detail for that facility.

4. When you click on View, you will see the detail on the right that can be downloaded.
Select the **Facility Comparison Dashboard**

5. These graphs allow comparison between Provinces, Districts, Wards and Facilities; showing lowest performing and
6. Best performing provinces, districts, wards and facilities

Select the **Progress dashboard**

7. These graphs indicate progress in terms of average percentage obtained
8. Percentage of Status Determinations submitted/captured

Select the **Outcome dashboard**. There are various graphs under this dashboard that are discussed in section 9 to 13

9. The performance graph shows the average score obtained per province, district, sub district, depending on the filters that were selected
10. The outcomes graph displays the average obtained for all the provinces, district, sub districts depending on the filters that were selected.

11. The responsibility graph display the scores obtained per responsibility, e.g. NDoH, Province, district and Health Facility.
12. Components graph presents the progress per component. When filters are applied to sub components and elements, data on these can also be displayed on these graphs.

13. The Range for % scores obtained display the number of facilities that obtained an average score within a specific range as indicated, i.e. <40%, 40-59%, 60-69%, 70-79% and ≥80%.

Select the Data Submission dashboard

14. This graph indicates the number of facilities that submitted a Status Determination as well as the percentage obtained on status determinations submitted.
Select the **Weighting analysis dashboard.** There are various graphs under this dashboard that are discussed in section 15 to 16.

15. The weighting analysis dashboard display the averages obtained per weight category.

16. The weighting analysis dashboard also display the averages obtained for the 3 weight categories per component.

Select the **Ideal Category dashboard.** There are various graphs under this dashboard that are discussed in section 17 to 20.

17. The Ideal Clinic category dashboard display the percentage of facilities that obtained an Ideal Clinic category (silver, gold, platinum and diamond).
18. The Ideal Clinic category dashboard also display the number of facilities that obtained an Ideal Clinic category (silver, gold, platinum and diamond).

19. By clicking on the legend tab named ‘Not achieved’ only the number of facilities that obtained an Ideal Clinic is displayed, the ‘not achieved’ bar is then hidden.

20. The pie graph display the percentage of facilities that obtained an Ideal Clinic category (silver, gold, platinum and diamond).
4. Print Dashboards

1. By clicking on the icon at the top right corner, images can be downloaded for use in reports and presentations. Select the format you want to save the graph in from the list that is displayed.

2. By clicking the circle icon on the top right corner, the image will be blown up.

3. By Clicking on the ‘Show labels’ tab at the top of the filter’s section that will display the labels on the graph.

4. The labels will drop down on the graph. This will enable the user to save or print the graphs with the values that are displayed.
5. Generate Reports

1. Go to the ‘Report’ tab on the toolbar of the Ideal Clinic software once you have logged in. Select the dropdown arrow. A list of all the various reports will be displayed.

2. To filter for a specific facility when generating reports, click on the dropdown list at the ‘Facility’ filter.

3. Click on the ‘Select All’ tick box to deselect all the

4. Type the first few letters of the name of the facility you want to generate a report for in the search box.

5. Tick the box next to the facility you want to generate the report for. Also select the version (never select multiple versions), date from and to and SD role if applicable on the various filters.

6. Select “OK”

7. Click on the ‘Generate Report’ button.
The Clinic Report for dashboard will generate the results for a specific clinic per element. All the Status Determinations that were captured for the specific facility will be displayed.

8. The Excel report will generate at the top or bottom of the web-browser (Chrome/FireFox/Internet Explorer), depending on the type of browser you use. Click on the file to open it. The score of the facility will be displayed at the bottom of the report as well as whether the facility has obtained an Ideal Clinic category or not.

9. The Clinic Report for Checklists will generate the results for a specific clinic per element on the first sheet of the Excel file (as in point 8) as well as all the checklists. Each checklist is displayed on a separate sheet within the Excel file.

Select the Clinic Report for dashboard or the Clinic Report for Checklists.
10. Note that the Clinic Report for Checklists will give a warning that reports can only be generated for a single report.

11. Once you have selected the facility the ‘Generate Report’ button will appear. Select to generate the report. If you select a facility for which a SD from version 15 for peer reviews and up have not been capture a warning message will appear ‘no available results’.
Select the **Comparative Report** which will allow comparison; for example comparison between Provinces, Districts, Wards and Facilities.

12. Filter at the top should be used to select the required information;
13. that you want to compare with the information at the bottom

14. The information selected at the top (step 12) are shown in comparison
15. With the information selected at the bottom (step 13)

16. Select the **Aggregate Report** that will show the aggregated data, depending on the filters that were selected. The report will always display the next level of aggregated data of the filter that was selected. For example if the filter at Province were selected for Gauteng, the report will display aggregated (average) data for each district within Gauteng.
17. A second type of report can be generated under the ‘Aggregate Report’ by ticking the box at the right bottom of the screen named ‘show individual clinics (Max 30)’. By selecting the tick box individual results per facility for each element on the dashboard will be displayed. Note that the report cannot generate more than 30 facilities per report. Therefore make use of the filters on ‘Province’, ‘District’ and ‘Sub-District’ to limit the number of facilities to 30.

18. If the tick box ‘show individual clinics (Max 30)’ has NOT BEEN SELECTED (section 16) the next level of the aggregated data of the filter that was selected (Gauteng were selected here) will be displayed, e.g the districts within Gauteng

19. If the tick box ‘show individual clinics (Max 30)’ WAS SELECTED (section 17) the individual results for the facilities selected will be displayed also indicating the scores per element, sub-components and components. The Status determination role used to capture the assessment will also be displayed.
20. Select the **Facilities Status Report** that will list all the facilities selected and give an average score scores per assigned weights (vital, essential and important) as well as an overall average score also indicating whether the facility has obtained an Ideal Clinic category (silver, gold, platinum or diamond).

21. The report displays the facilities with an average score obtained per weight, overall as well as the Ideal Clinic category.
22. Select the **Question Comments Report** that will display all comments that was captured for ‘Partial’ scoring.

23. All comments that were captured will be listed in the report.

24. Select **Quality Improvement Plan(QIP)** report OR the **Checklist Improvement plan**.
25. The ‘QIP’ will generate all the elements that were failed by the facility. The ‘Checklist Improvement plan’ will generate all the measures that were failed on the checklists. Complete the columns as indicated to finalise the facility’s QIP.

In cases where the filters are set per province, district or sub district, the column named ‘Total’ display the total number of facilities that have failed the specific element.

26. Select the Scale Up Report. The report display the average obtained per facility, the Ideal Clinic category (silver, gold, platinum or diamond) obtained as well as the year the facility is planned for scale up.
27. The ‘Scale Up Report’ is the only report on the software that list ALL the facilities irrespective if a status determination was conducted and captured for the facility. The other reports in section 1 to 27 only display facilities for which a status determination was captured for. This report is therefore very useful to check which facilities have not conducted a status determination yet.

28. Select the Progress and outcome of status determination conducted.

29. The report display the following data per district:
   - Number of facilities within the district
   - Number of facilities that conducted a status determination
   - The % of facilities that conducted a status determination
   - The average score obtained for the district
   - The number of facilities that obtained an Ideal Clinic category and
   - The % of facilities that obtained an Ideal Clinic category
Select the **Query tool** that will generate a report on all the data that is captured depending on which filters are selected.

30. By selecting the check box named ‘Include checklists results if available’ the results from the checklists will also be displayed.

31. When the ‘Generate report’ button is selected the download will begin to commence, a message ‘Your request has started and is busy being processed’ will appear.

32. Once completed the down will be displayed at the bottom of the page. Note, depending on the filters that were selected the download can take up to an hour when filters were not applied. This will also depend on the speed of the connectivity.

33. All data per facility per elements and measures on the checklist will be displayed.
Select the Exceptions Report

34. Select the tick boxes to either generate a report that will indicate the month the facility has last captured a status determination or

35. The tick box to generate facilities that scored below 50%