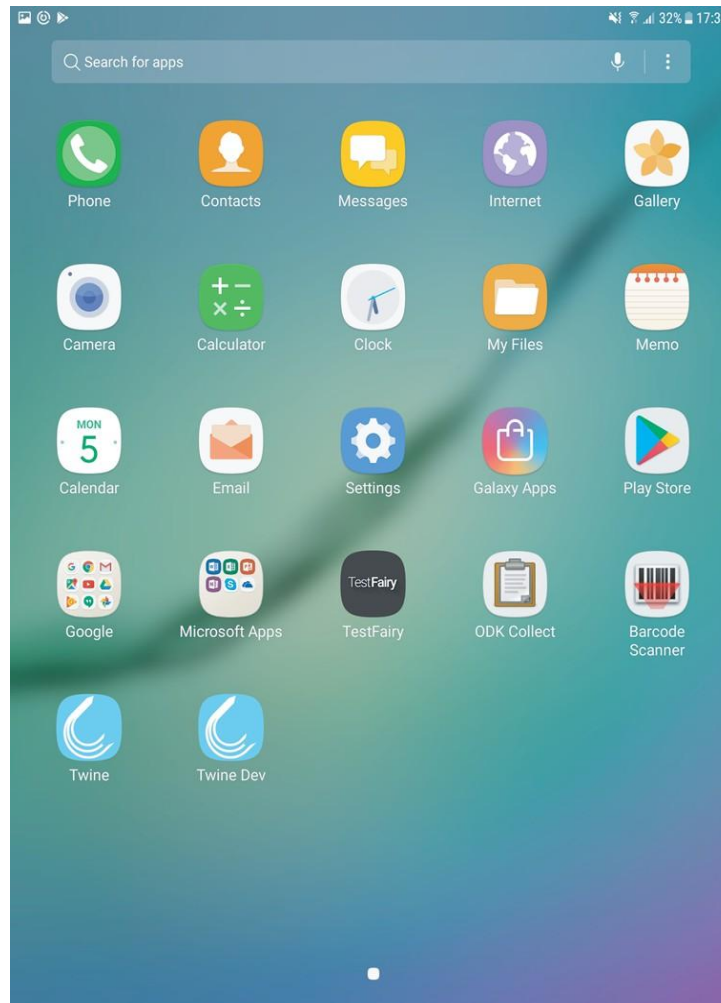# BALANCED SCORE CARD

Overview on Scores, Setup and Use

INTRODUCTION

WHAT IS IT?

The balanced scorecard is a tool to assess the quality of care provided in your primary health facility.

The balanced scorecard allocates scores to a health facility in the following domains:

1. Services Provided

2. Staffing and Coverage

3. Equipment and Supplies

4. Quality of Care

5. Patient Satisfaction

HOW CAN THE RESULTS BE USED?

- Identify gaps and develop targeted recommendations related to key domains of health service management and service provision

- Monitor improvements over time

- Mobilize additional training, resources or technical support
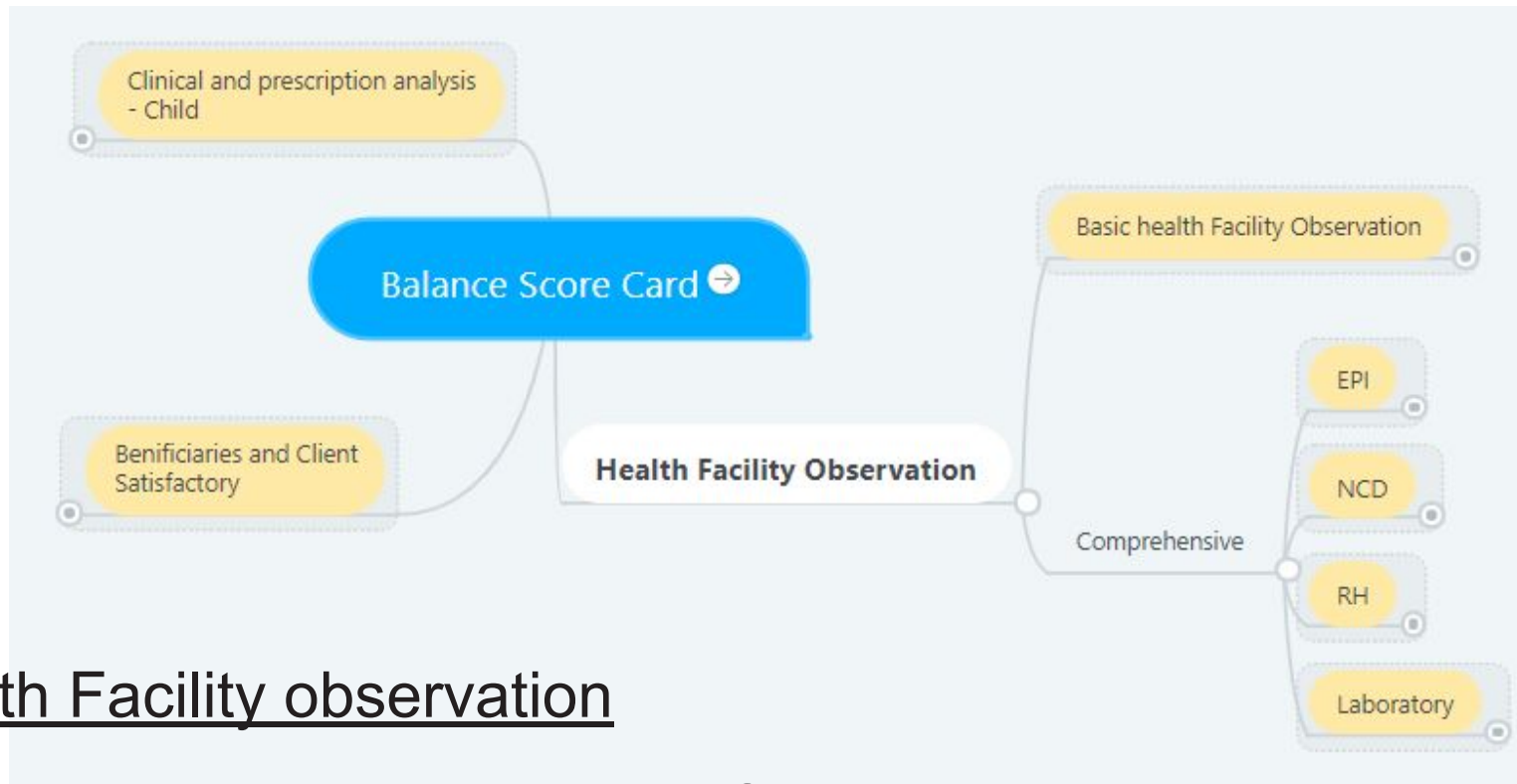
- Document good practices

WHERE CAN IT BE USED?

- Camps

- Urban settings

- High income settings

- Low income settings

- Emergency situations

- Protracted situations

# HOW IS THE SURVEY STRUCTURED?

GLOBAL STRUCTURE

Health Facility observation

- Basic survey : Health Facility Observation
- Comprehensive survey : EPI (Immunization), NCD Assessments, RH (Reproductive health Assessment) and Laboratory Assessment

Additional
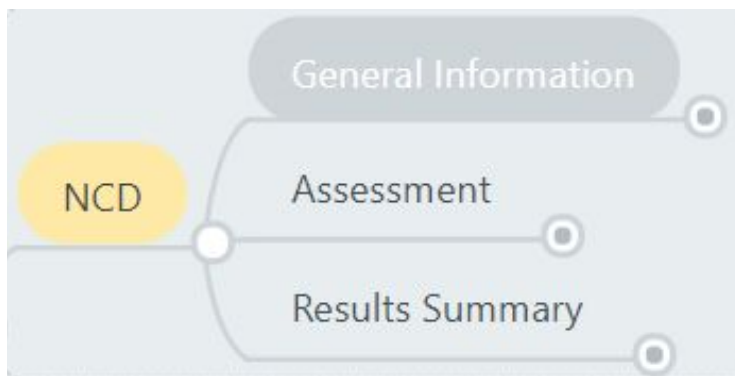
- Child Observation
- Clients Interviews

GLOBAL STRUCTURE

Forms
- Health Facility Observation
  - Basic Survey
    - Health Facility Observation
  - Comprehensive survey
    - EPI (Immunization) Assessment
    - NCD Assessments
    - RH (Reproductive health) Assessment
    - Laboratory Assessment
- Additional
  - Child Observations
  - Clients Interviews
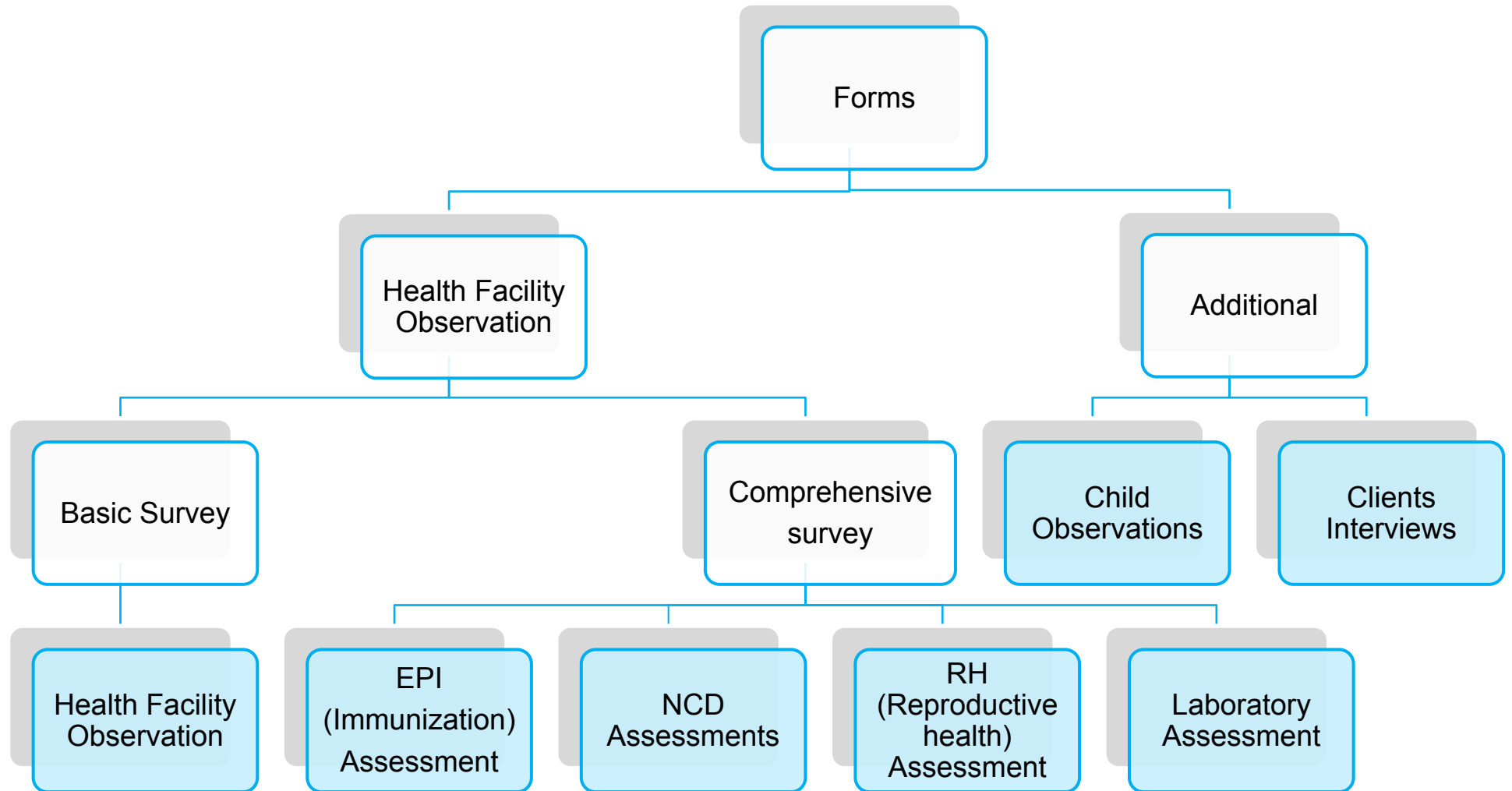
STRUCTURE OF THE FORMS

Each form is structured as follows:

- A common section, "General Information" : necessary to identify the evaluation

- Assessment questions

- Results with indicators scores, based on the answers given during the assessment

A GENERAL STANDARD SECTION

Example for questions on the standard section
and how they are related

Assessor Team

Country

Barcode   Site

Location

Name of HF

GPS

General Information

First BSC?   Last BSC
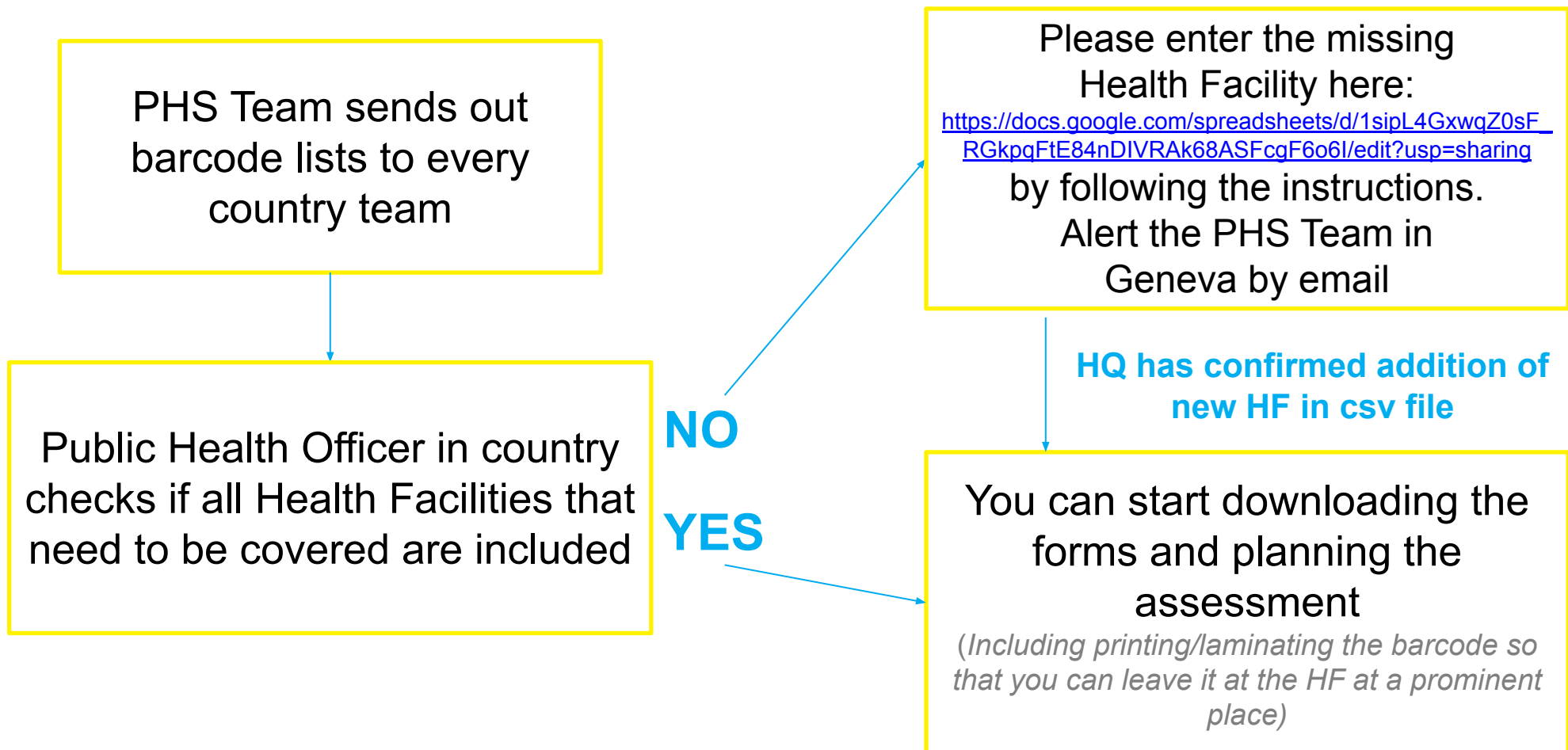
Dates

Date of BSC

Name of Partner

Type of HF
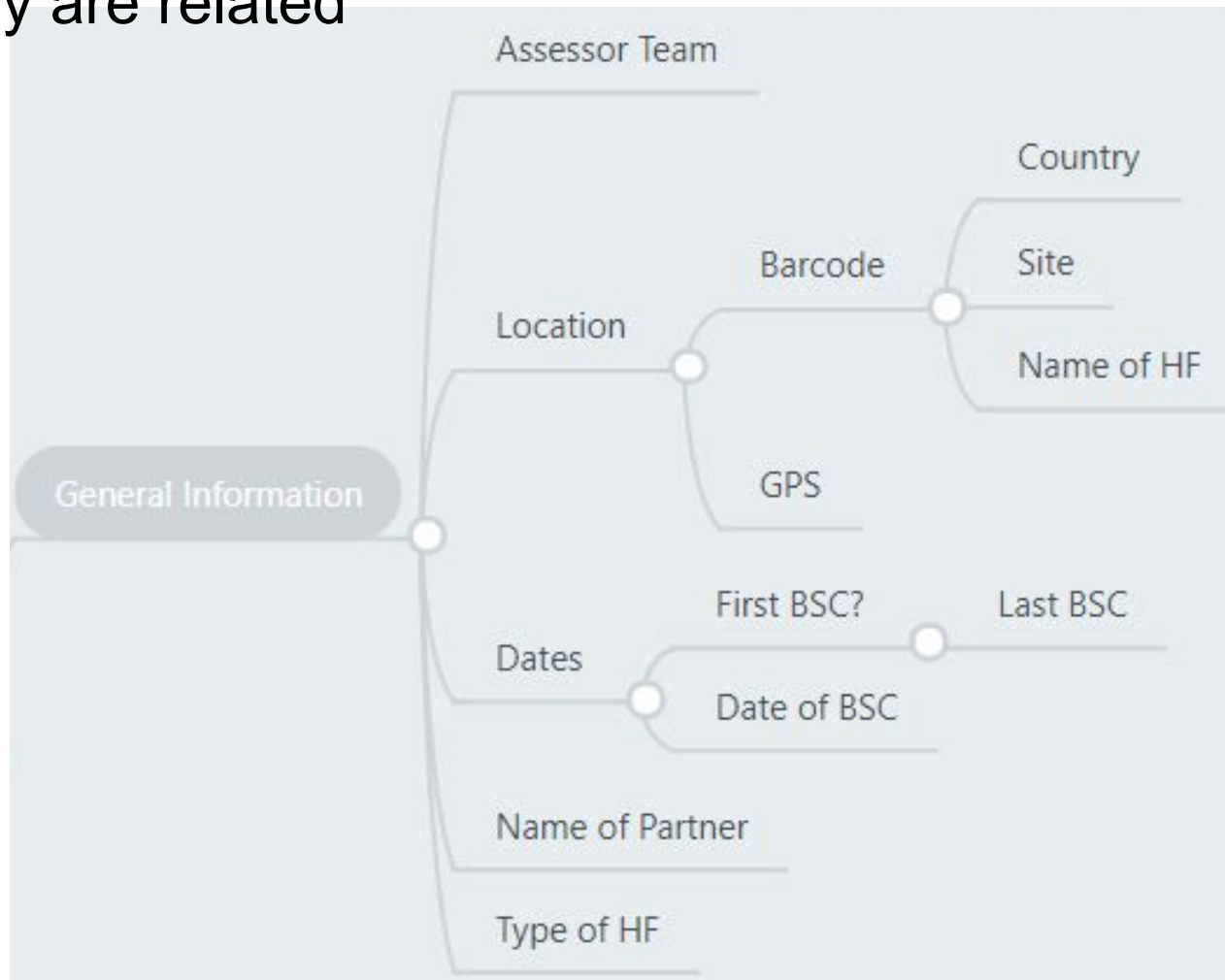
HEALTH FACILITY ID, LINKING QUESTIONNAIRES
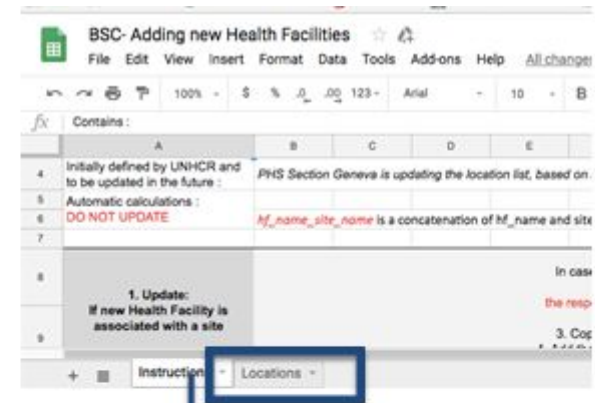
HEALTH FACILITY ID

In order to link the different questionnaires together for the overall scoring on the BSC Dashboard and any other analysis, a unique Health Facility ID needs to be used.

PROCESS

PHS Team sends out barcode lists to every country team

Public Health Officer in country checks if all Health Facilities that need to be covered are included

NO

YES

Please enter the missing Health Facility here:
https://docs.google.com/spreadsheets/d/1sipL4GxwqZ0sF_RGkpqFtE84nDIVRAk68ASFcgF6o6I/edit?usp=sharing
by following the instructions. Alert the PHS Team in Geneva by email

HQ has confirmed addition of new HF in csv file

You can start downloading the forms and planning the assessment
(Including printing/laminating the barcode so that you can leave it at the HF at a prominent place)

11

HEALTH FACILITY ID

- To enter a new Health Facility, access this link and enter the missing HF, following the instructions found in tab 1. Leave code empty, as this is being generated by the HQ team

- Once this has been done, alert the PHS Team in Geneva by email

- The PHS team will respond confirming steps to include the missing HF into forms has been completed
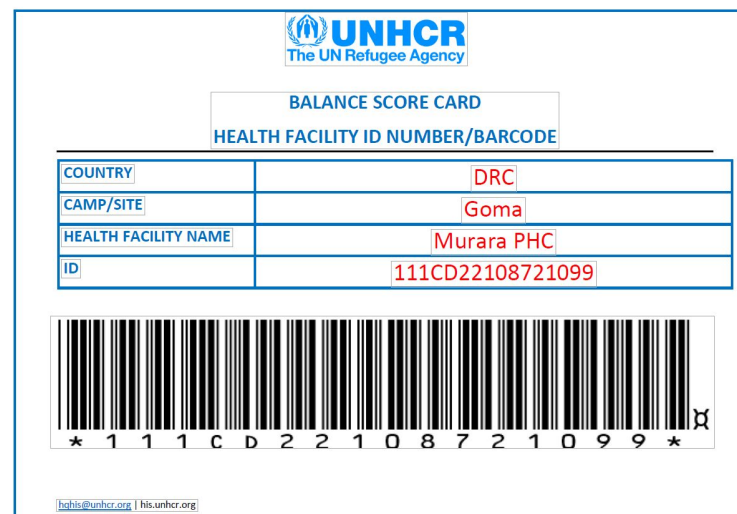
RECORDING HF ID: BARCODES

Using Barcodes allows you to quickly chose which Health Facility is covered in your current questionnaire as you will not need to enter the identifiers manually.

A barcode corresponds to a unique ID. This ID is composed of identifiers for a <u>country, a camp/site</u>, and a <u>Health Facility.</u>

Which means that once you scan the barcode corresponding to the health facility you are assessing:

The form auto-completes country, camp, and health facility fields (and asks you to validate it). This saves time!

》 *If your phone scanned an incorrect barcode, adjust the illumination if necessary and try again ensuring that the full barcode is visible in the scanning rectangle.*

UNHCR
The UN Refugee Agency

BALANCE SCORE CARD

HEALTH FACILITY ID NUMBER/BARCODE

COUNTRY	DRC
CAMP/SITE	Goma
HEALTH FACILITY NAME	Murara PHC
ID	111CD22108721099

* 1 1 1 C D 2 2 1 0 8 7 2 1 0 9 9 *

hqhis@unhcr.org | his.unhcr.org

Basic_Health_Facility_Observation_v6

Check the following statement correct ? If not, check that you entered the correct HF ID.

* Country : Congo (DR)

* Camp / Site : Goma

* Health Facility Name: Murara PHC

* Health Facility ID : 111CD22108721099

BARCODES

If for technical or logistical reasons you can't scan the barcode, it is also possible to choose the respective health facility from a dropdown list after you specified country and site.

SCORES & INDICATORS

SCORES & INDICATORS

The BSC indicators are based on scores derived from the answers given during the assessment.

A different weight is used depending on the values of the answers.

> Example Basic Health Facility observation, section dental medicines:
> Each medicine will score null if not available or all expired, 1 if some are available and some are expired and 2 if available.

Each Medicine	Score
If not available or all expired	0
Some are available and some are expired	1
If Available	2

BSC_Health_Facility_Observation_v4

7.GENERAL MEDICINE SUPPLY MANAGEMENT

7.1 GENERAL MEDICINES

|	Observed available	Any expired	Out of stock
* Analgesics	☑	☐	☐
Ibuprofen 200 mg			
* Ibuprofen 400 mg	☐	☑	☐
* Paracetamol 100 mg	☐	☑	☐
* Paracetamol 500 mg	☐	☐	☑

SCORES & INDICATORS

Depending on the skip patterns, indicators will adjust to reflect the local context.

❯ Example Basic Health Facility Observation:

If malaria is known to be one of the main reasons for morbidity, then HF should have antimalarial, else antimalarial availability won't be checked.

So the calculation of percentage for general medicines in case HF is located in a malaria prone area will be based on a higher expected total than in a HF where malaria is not existing.
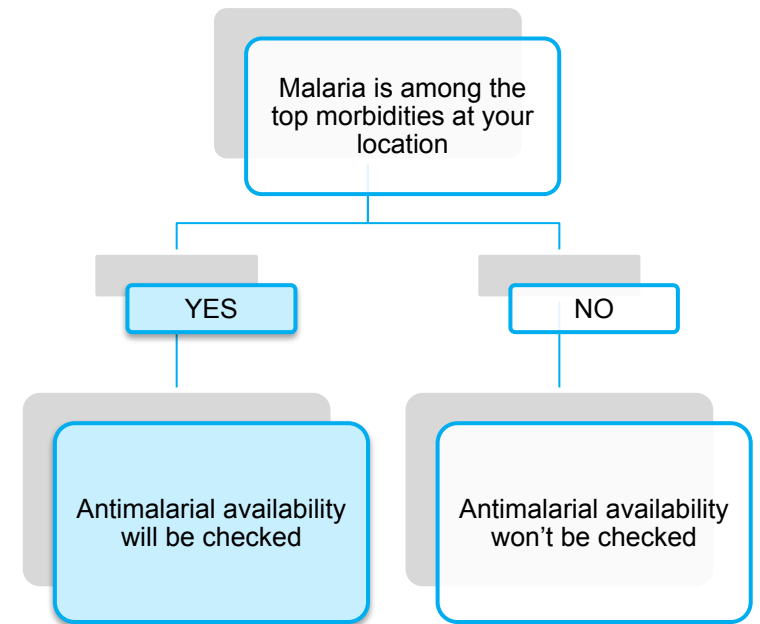
SCORES & INDICATORS

LOOPS

Same as standard one but averaged with the number of loops repeated

> Examples for loops: Questionnaire Child up to 0-59 months.

SCORES & INDICATORS

LOOPS

| FORM	LOOP	REQUIRED ENTRIES
Child up to 0- 59 months	Clinical observation Child up 0- 59 months	>= 3
	Prescription analysis for acute health condition for under 5	>= 20
Comprehensive EPI Assessmen	Observation of an EPI session	>= 5
Comprehensive RH Assessment	Reproductive health clinical observation	>= 3
Comprehensive NCD Assessment	Clinical observation	>= 3
	Prescription analysis for NCD	>= 20
Client Satisfactory	Interview with caregivers of vaccinated infants	>= 5
	Client interview (> 5)	>= 5

SCORES & INDICATORS

GLOBAL RATE

This is the average of indicators related to local context

》 <u>Example Basic Health Facility Observation</u>:
If there is no laboratory in the HF, average will be based on all indicators apart from laboratory. No weight applied on indicators used for the mean.

INDICATORS: Example
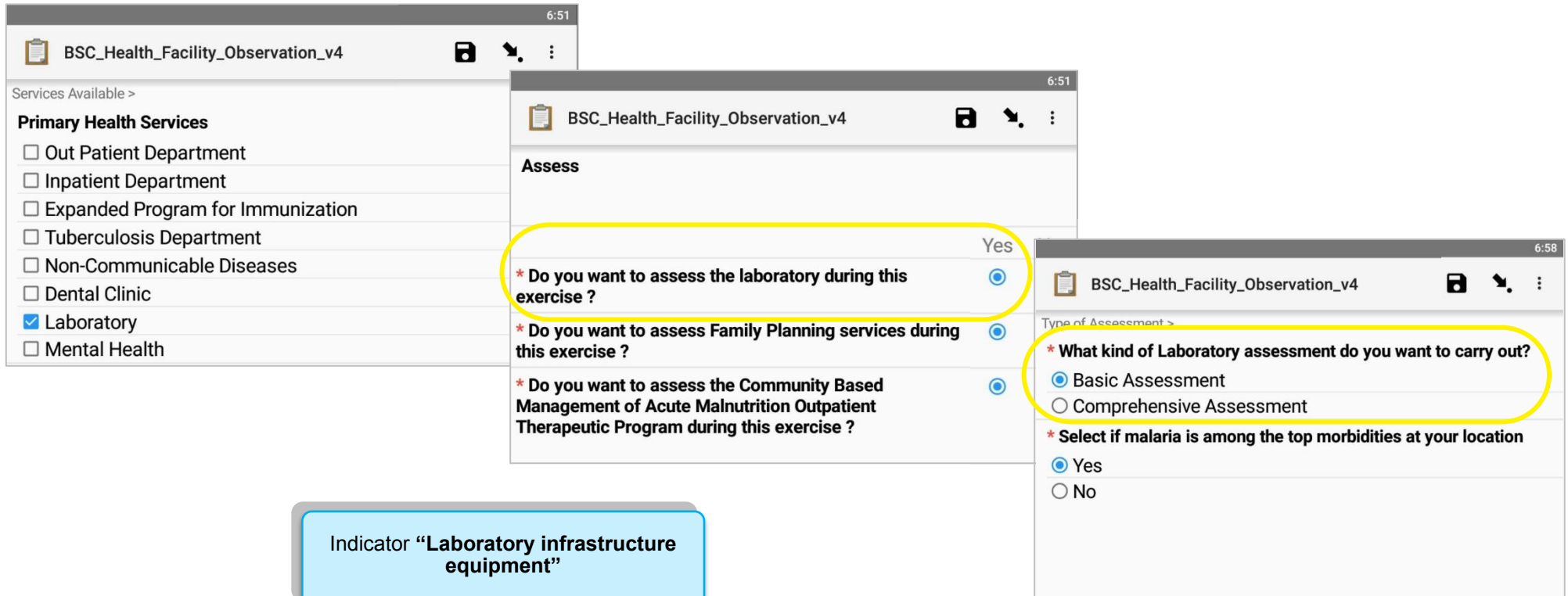
Indicator **"Laboratory infrastructure equipment"**

If **Primary Health Service ="Laboratory"** (Screenshot1) and **Do you want to assess the laboratory during this exercise="Yes"** (Screenshot 2) and **What kind of laboratory assessment do you want to carry out="Basic Assessment"** (Screenshot 3)
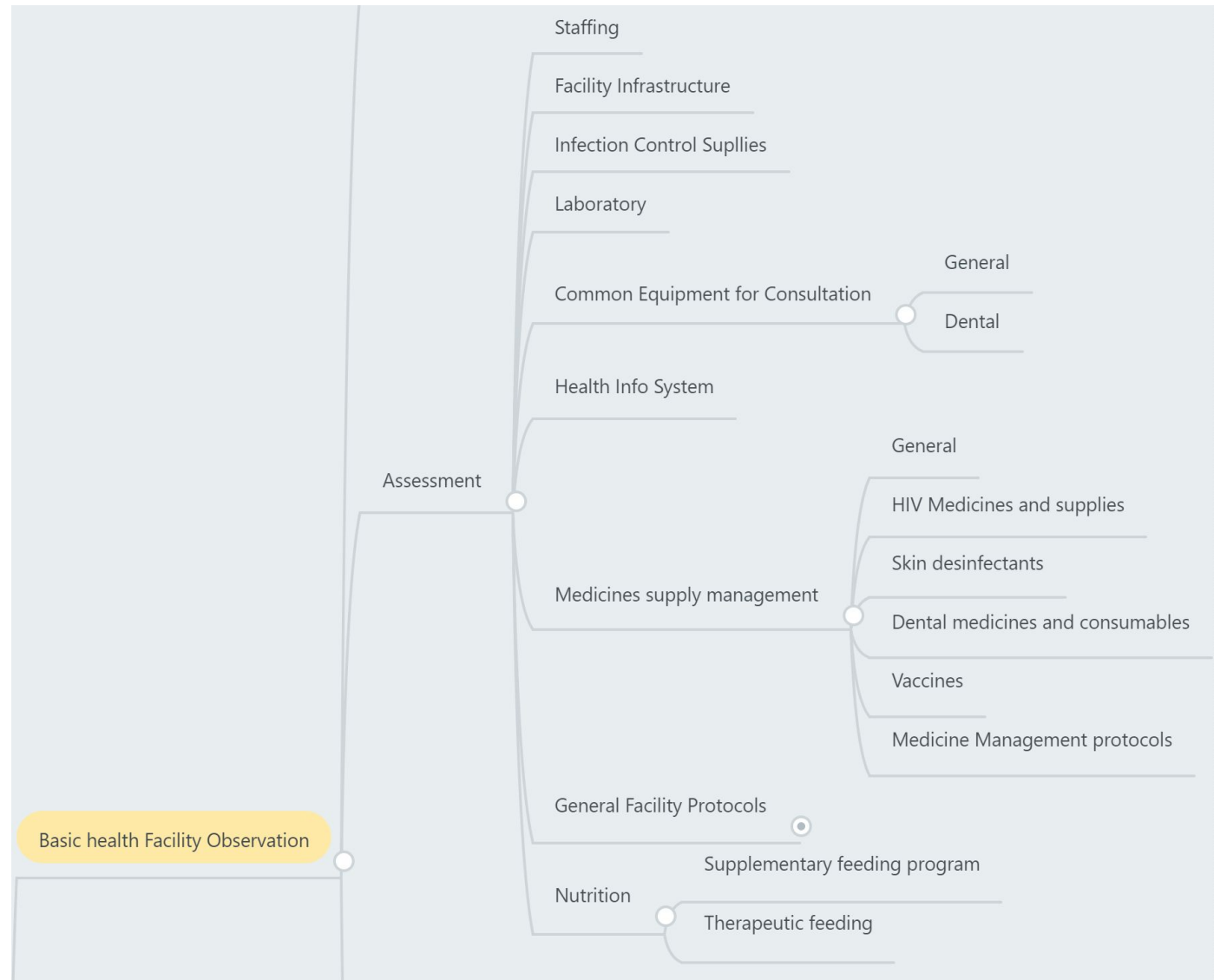
YES   NO

Score   No score Applied

ASSESSMENT FORMS: SCORES
Basic Health Facility Observation

ASSESSMENT FORMS: SCORES

Immunization

ASSESSMENT FORMS: SCORES

NCD Assessments

ASSESSMENT FORMS: SCORES

Reproductive Health Assessment

ASSESSMENT FORMS: SCORES
Laboratory assessment

Laboratory_Evaluation_v2 — 7:35

RESULTS SUMMARY

Results at Facility by test at 2018-08-08 :

GENERAL CONDITIONS OF THE LABORATORY STRUCTURE : 50 %

UTILITIES AND LABORATORY STRUCTURE: 42 %

BIOSAFETY, HYGIENE and SECURITY : 75 %

SPECIMEN COLLECTION, HANDLING and RECORDING : 67 %

REAGENTS AND SUPPLY : 50 %

ANALYSIS AND TEST PERFORMED : 39 %

LABORATORY STAFF AND WORKING TIME : 100 %

REPORTING, SURVEILLANCE, ANALYSIS and COMMUNICATION : 88 %

QUALITY ASSURANCE : 48 %

OUTBREAKS - OUTBREAK PARTICIPATION : 50 %

GLOBAL RATE : 59 %

General Information

Workload

General conditions

Utilities and Lab Structure

Biosafety, Hygiene and Security

Specimen Collection, Handling and Recording

Equipment and Supplies

Laboratory — Assessment — Reagents and Supply

Analysis and tests performed

Laboratory Staff and Working Time

Reporting, Surveillance, Analysis and Communication
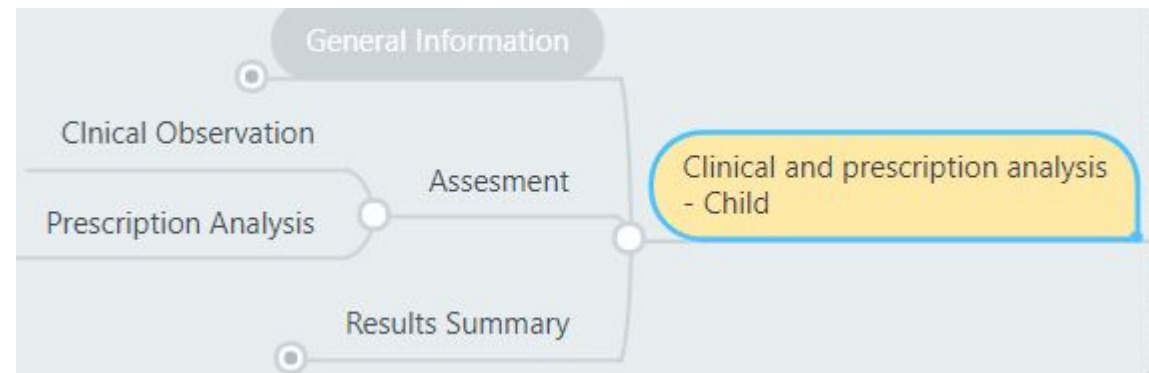
Quality Assurance

Outbreaks - Outbreak Participation

ASSESSMENT FORMS: SCORES

RESULTS SUMMARY

Results at Facility by test at 2018-08-03 :

BENIFICIARIES SATISFACTION SCORE : 54 %

GENERAL CLIENTS SATISFACTION SCORE : 47 %
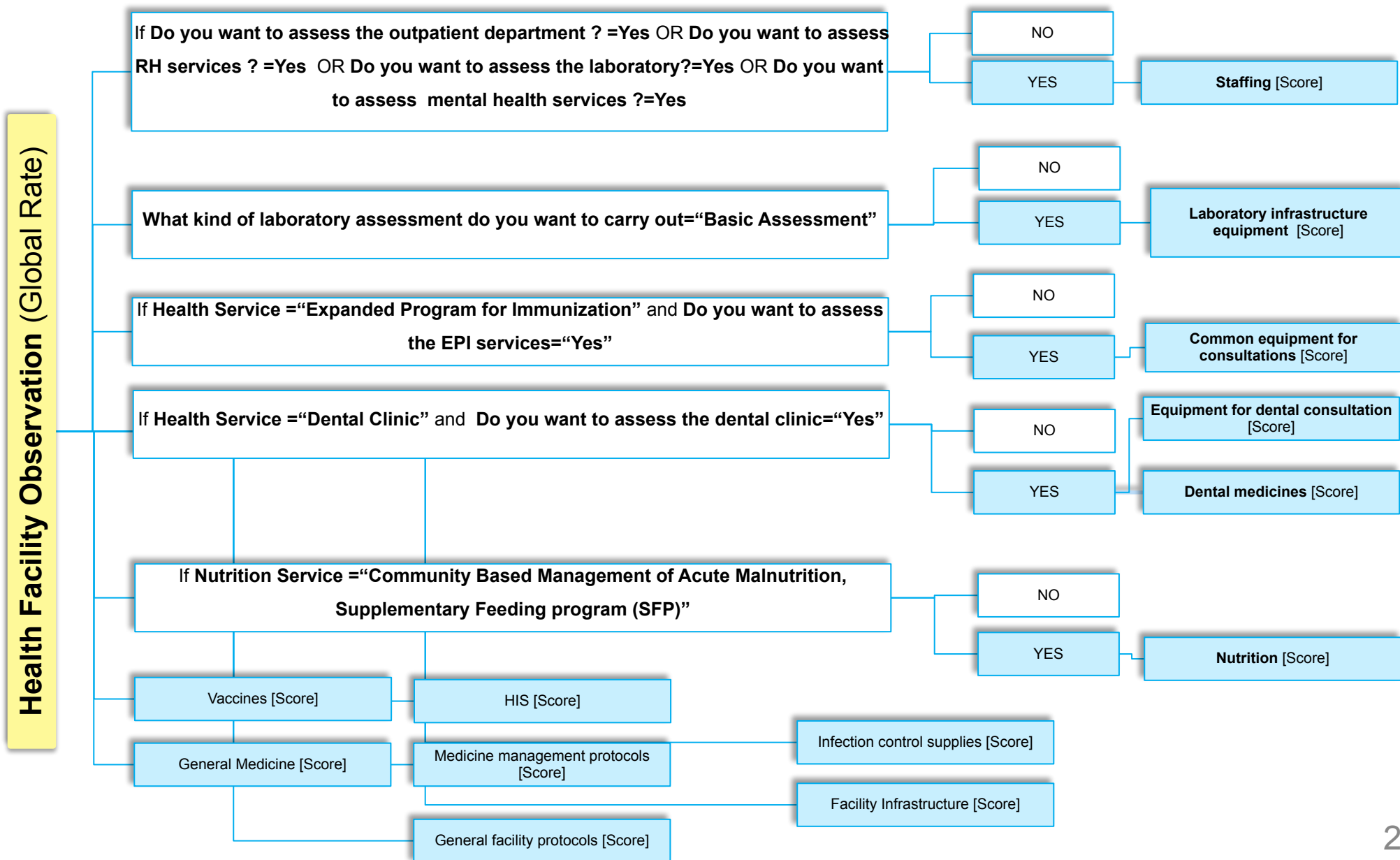
GLOBAL : 51 %
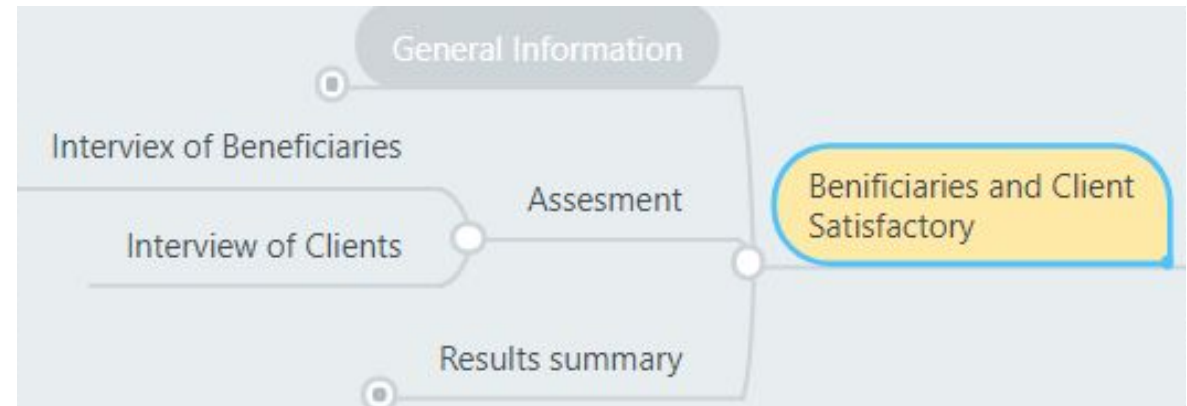
Final Results
RESULTS SUMMARY

Results at Facility Yyyy by Ggg at 2018-03-05 :

Clinical observation child : 75 %

Prescription Analysis for Acute Health Conditions for Under 5 Children: 25 %

GLOBAL RATE : 50%

INDICATORS
Health Facility Observations

Health Facility Observation (Global Rate)

If **Do you want to assess the outpatient department ? =Yes** OR **Do you want to assess RH services ? =Yes** OR **Do you want to assess the laboratory?=Yes** OR **Do you want to assess mental health services ?=Yes**

- NO
- YES → **Staffing** [Score]

What kind of laboratory assessment do you want to carry out="Basic Assessment"

- NO
- YES → **Laboratory infrastructure equipment** [Score]

If **Health Service ="Expanded Program for Immunization"** and **Do you want to assess the EPI services="Yes"**

- NO
- YES → **Common equipment for consultations** [Score]

If **Health Service ="Dental Clinic"** and **Do you want to assess the dental clinic="Yes"**

- NO → **Equipment for dental consultation** [Score]
- YES → **Dental medicines** [Score]

If **Nutrition Service ="Community Based Management of Acute Malnutrition, Supplementary Feeding program (SFP)"**

- NO
- YES → **Nutrition** [Score]

Vaccines [Score]

HIS [Score]

General Medicine [Score]

Medicine management protocols [Score]

Infection control supplies [Score]

Facility Infrastructure [Score]

General facility protocols [Score]

INDICATORS

LABORATORY ASSESSMENT	REPRODUCTIVE HEALTH ASSESSMENT	NCD ASSESSMENTS	IMMUNIZATION
General conditions of the laboratory structure	Basic rh protocols	Equipment for ncd consultations	Cold chain
Utilities and laboratory structure	Advanced Protocols	Ncd medicine and consumables	Program quality
Biosafety, hygiene and security	Detailed reproductive	Ncd protocols	Observation of EPI session
Specimen collection, handling and recording	Health/HIV protocols	Clinical observation	Global rate
Equipment and supplies	Referrals	Prescription analysis for ncd	
Reagents and supply	Maternal nutrition	Global rate	
Analysis and test performed	Rh medicines		
Laboratory staff and working time	Rh equipment		
Reporting, surveillance, analysis and communication	Rh his		
Quality assurance	Anc observations		
Outbreaks - outbreak participation	Pnc observations		
Global rate	Global rate		

RH Assessment score:
- Advanced protocols is a synthesis of detailed, health/HIV, referrals and maternal nutrition protocols. These are not used in the final score.
- Global rate of RH assessment bases its mean on advanced protocols synthesis plus other indicators but doesn't use the more detailed assessments.

29

INDICATORS

CHILD OBSERVATIONS	CLIENT INTERVIEWS
Clinical observation child	Beneficiaries satisfaction score
Prescription analysis for acute health conditions for under 5 children	General clients satisfaction score
Global rate	Global rate

PREPARING THE TABLET

OVERVIEW OF TOOLS

ODK/Kobo Collect + Kobo Toolbox

Kobo Toolbox

ODK Collect

Kobo Collect

Sending blank forms

Sending results

OpenDataKit (ODK)

ODK Collect

OpenSource solution for Android

- Widely used

- Base of numerous similar apps

- Safe storing on your own servers

- Powerful and flexible

Why ODK rather than Kobo Collect?

- More frequent updates

- Bugs fixed faster

- New features are available sooner

33

TABLET SETTINGS
Energy consumption

To save energy when not using it
- WIFI OFF
- Flight mode ON
- GPS OFF

To save energy when using it

- Lower luminosity of the display

❯ You might need to adapt it depending on your environment, in dark rooms it is ok to have luminosity at its lowest, whilst being outside in full light you might need to increase luminosity.

15:13 | Thu, 19 July

Search tablet and scan for nearby devices

Wi-Fi   Sound   Bluetooth   Auto rotate

Torch   Flight mode   Power saving   Mobile data

Mobile hotspot   Private mode   Location   Smart View

34
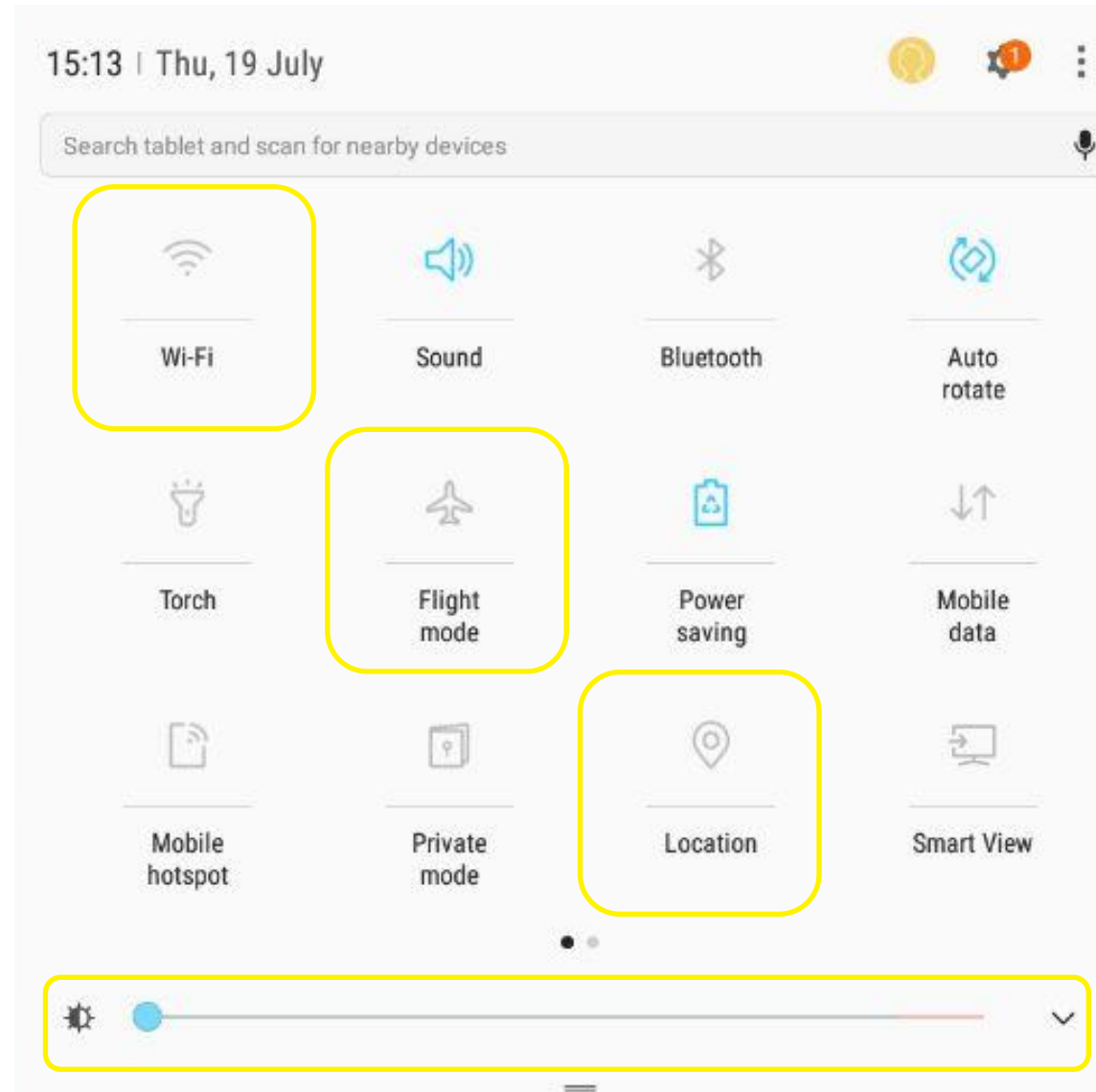
TABLET SETTINGS

Energy consumption

- Charge up battery daily if possible and/or bring extra power banks to prolong battery life

- Turn off synchronisation and all other unnecessary options like Bluetooth

- Check and correct if necessary your tablet's date and time
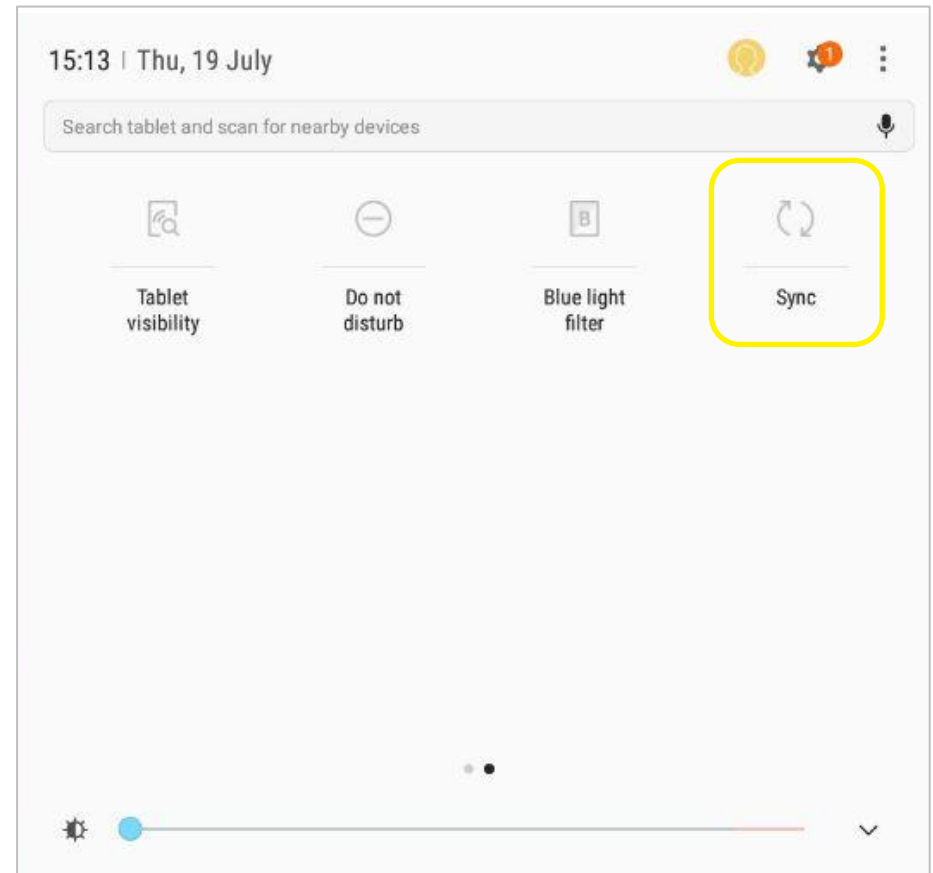
APPLICATIONS

You will need to have either **ODK Collect** or **Kobo Collect** to run the BSC forms.

》 You can find them on : Play store, ODK

1. Search for KoBoCollect or ODK in the Google Play Store

2. Download Kobo/ODK Collect and run installation
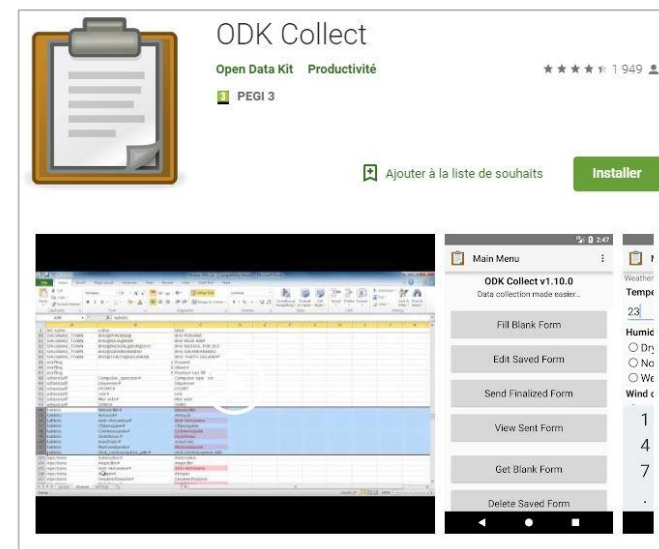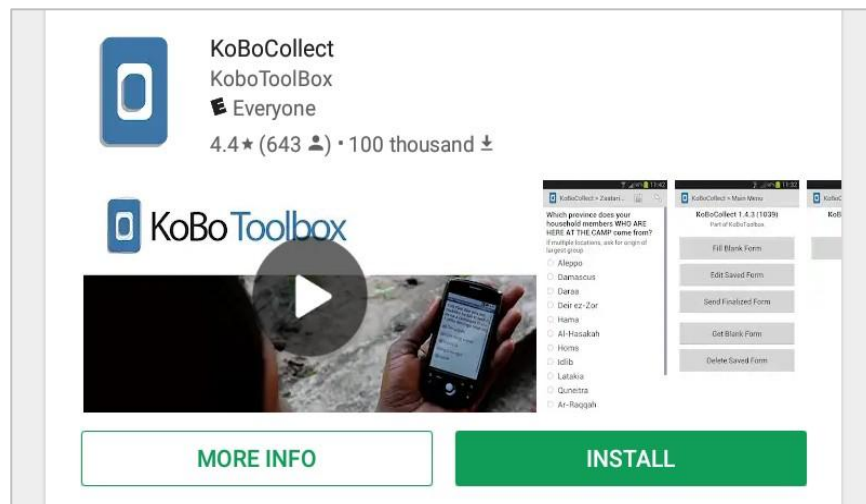
APPLICATIONS

Install the following as well

- **GPS test** : faster/more accurate acquisition of location for GPS readings
- **Barcode Scanner**: for use with barcodes, Xzing works best with ODK

≫ You will need a working camera on your tablet
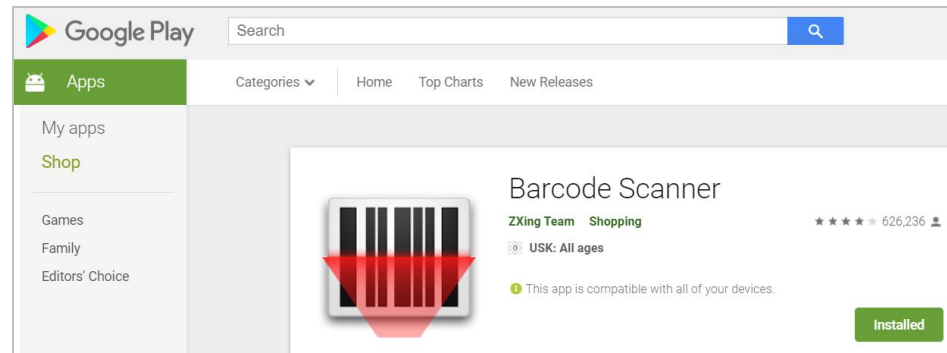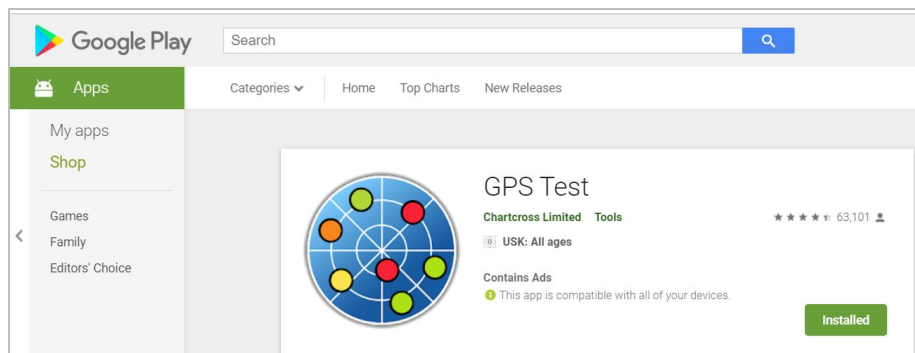
A file manager such as AndExplorer may be useful – available for free on the Play Store/Google Play. Many newer phones have a file manager already pre-installed.

ODK SETTINGS

SETTINGS

OVERVIEW

Settings are accessible from the top right hand corner when launching the app.

> The available settings will be categorized into '*mandatory/highly recommended*' and '*good to know*' categories.
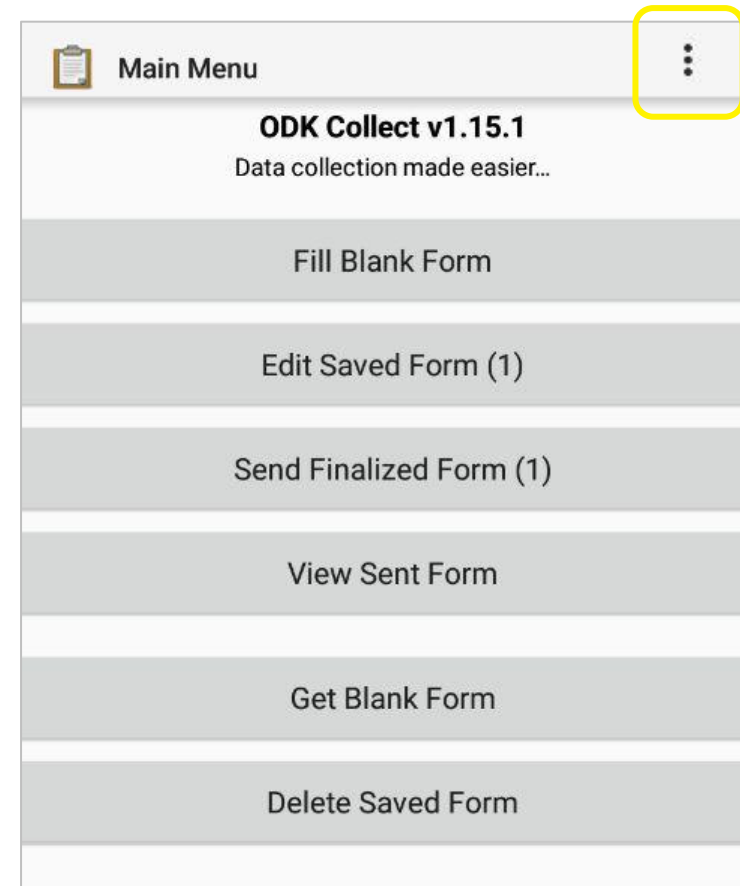
SETTINGS
MANDATORY AND HIGHLY RECOMMENDED
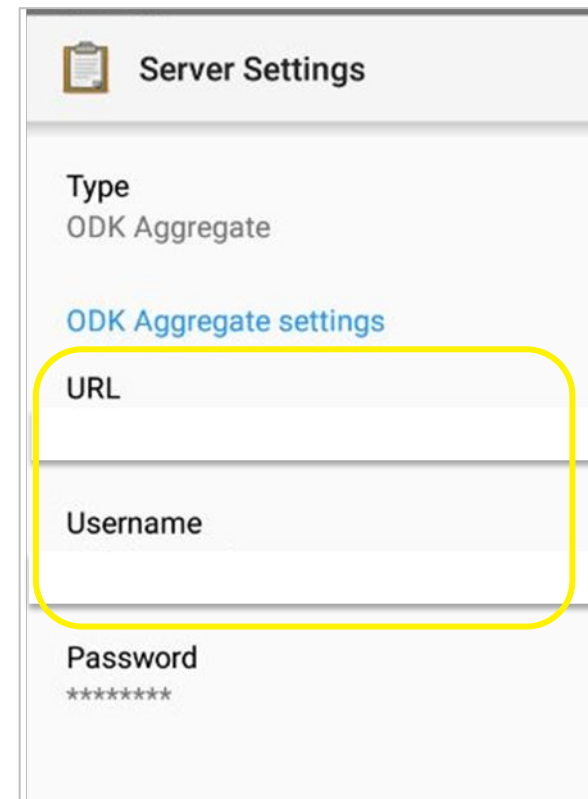
In General Settings
   > Server

Define your Kobo server access

https://kobocat.unhcr.org

》 Username: bsc
   Password: bsc_@unhcr1

SETTINGS
MANDATORY AND HIGHLY RECOMMENDED

In General Settings
*   > User interface*
*   > Navigation*

We recommend for BSC forms to have forward/backward option only as each screen has a large set of questions and you may swipe accidentally while trying to fill it.

41
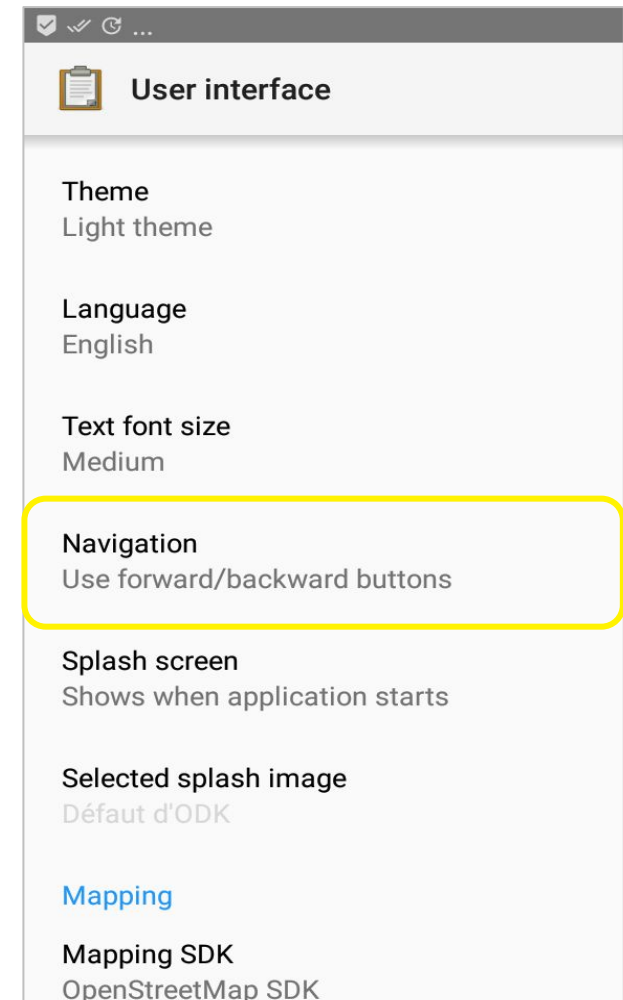
SETTINGS
MANDATORY AND HIGHLY RECOMMENDED

In General Settings
    > Form management

"Auto send with WIFI" → uncheck it

"Delete after send" → untick it so that you can reread your submissions on your tablet

"Default to finalize" → we advise you to untick so you can double-check records at the end of the day

---

Form update

Periodic form updates check
Never

Automatic download
Automatically download updated versions of forms ☐

Hide old form versions
Only the newest version will appear in Fill Blank Form ☑

Form submission

Auto send
Off

Delete after send ☐
Deletes finalized forms and media after sending to server

Form filling

Default to finalized ☐
Mark form as finalized by default

Constraint processing
Validate upon forward swipe

High res video ☑
Enable high-resolution video recordings

Image size
Original size from camera (default)

Show guidance for questions
Yes - always shown

Form import

Finalize forms on import ☑
Affects forms added directly to instances folder.

SETTINGS
GOOD TO KNOW

In Admin Settings
> Main menu settings

Ensure all options are ticked

❯ *If « Edit Saved Form » is unticked you won't be able to modify saved form*
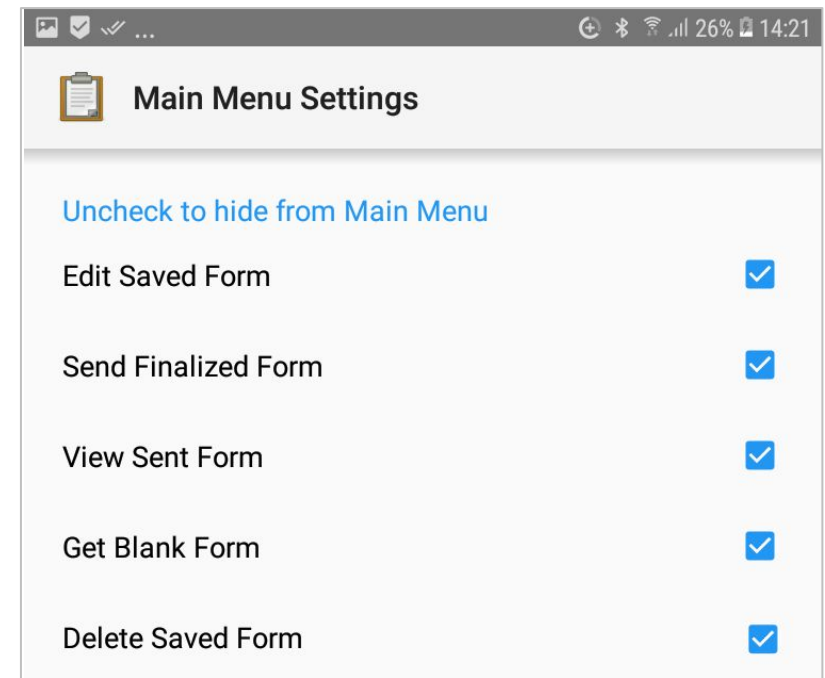
Under "Admin settings" you can set other parameters, and hide some features from enumerators *(deleting forms etc)*

SETTINGS

In Admin Settings

> Import/Export Settings

Import standard setting
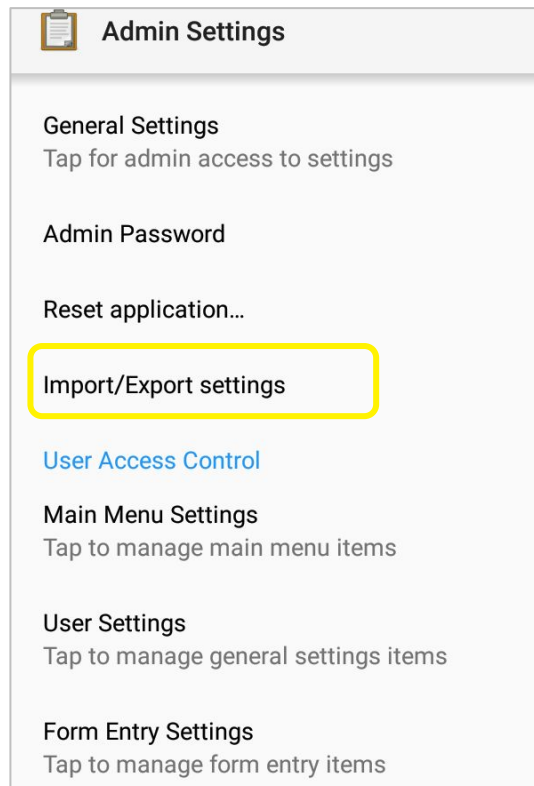
〉 Scan the following QRCode and you won't have anything to set up, apart from your server access !

USING ODK

TABLETS FIRST CHECKS

Smartphone management

Before starting a survey, check:

• **Date** and **time** of the tablet

• **GPS** is working
  Launch GPS Test and check the app finds a position with less than 10 meters accuracy *(from ODK version 1.16 and up you can see the number of satellites).*

  》 If not working, try to find the position when with a wifi connexion, after the tablet has fixed a first position it will go faster for all subsequent locations in the same region.

• The **barcode scanning app**
  For instance this one which works well with ODK: Zxing

46
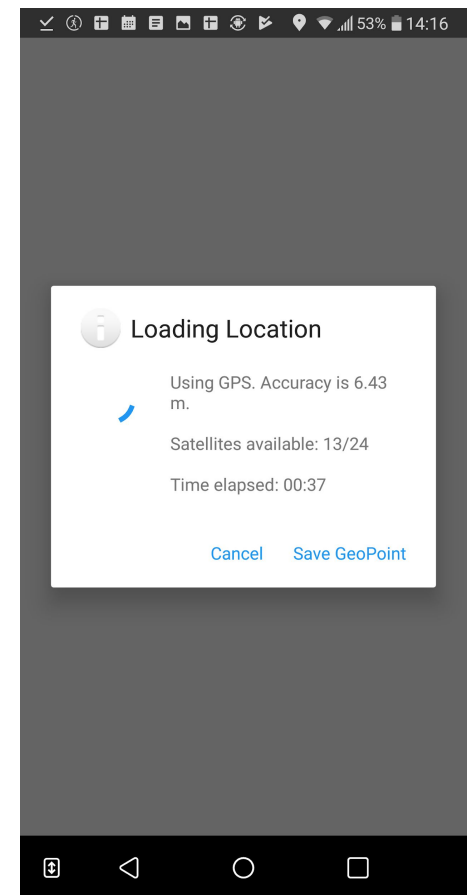
GET BLANK FORMS

Download the forms you need on your tablet

47
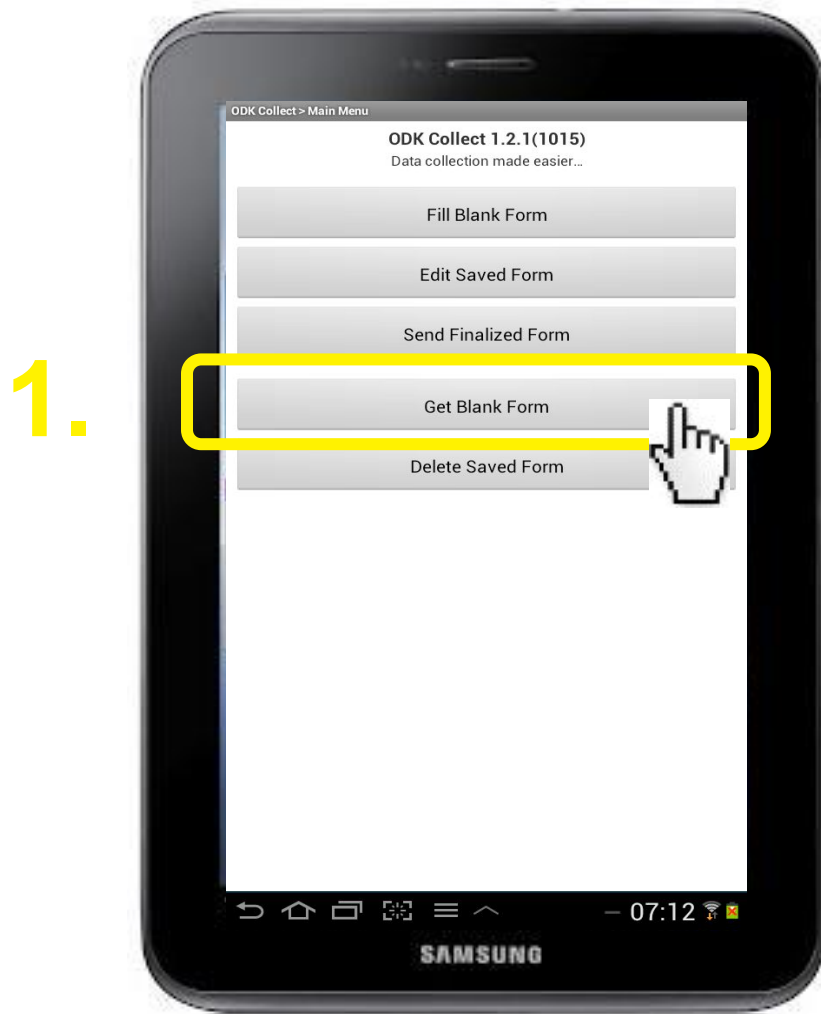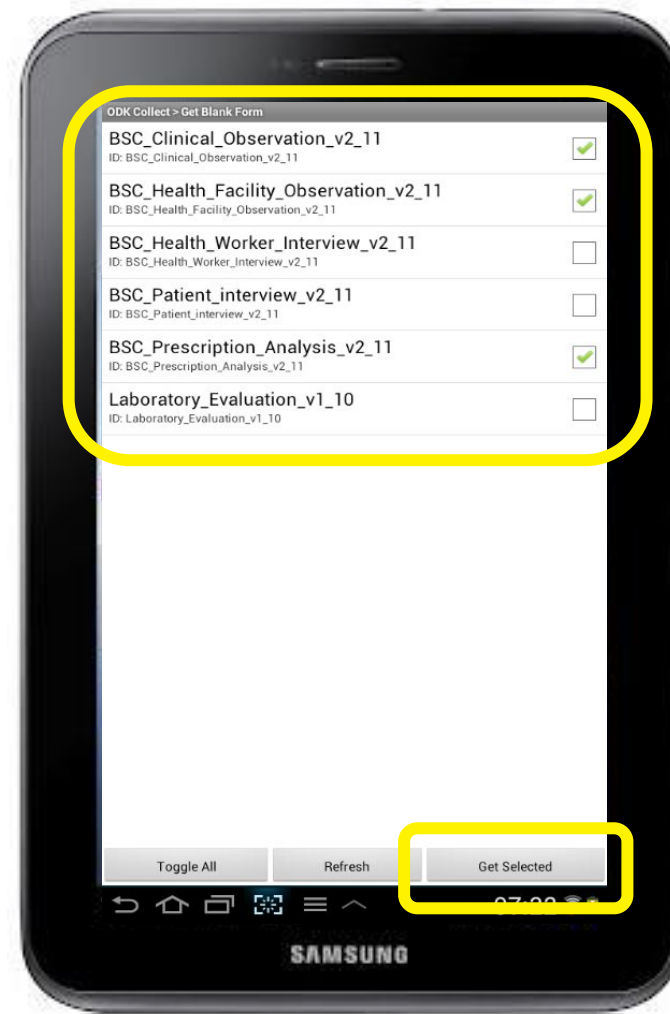
ODK FORM FILLING OPTIONS

Fill Blank form → start filling a survey

Few options always available at the top right hand corner :

- Floppy disk for saving your answers and

- Arrow to go directly to a specific question
  - 》 Very useful when you want to reread a form or filling it where you stopped
- 3 dots for changing language
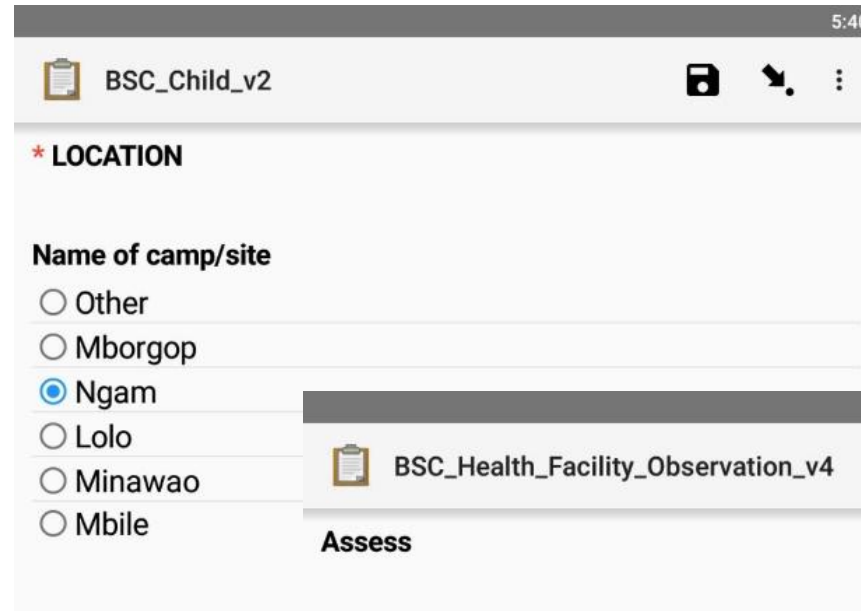
At the bottom → to go from one screen to the other
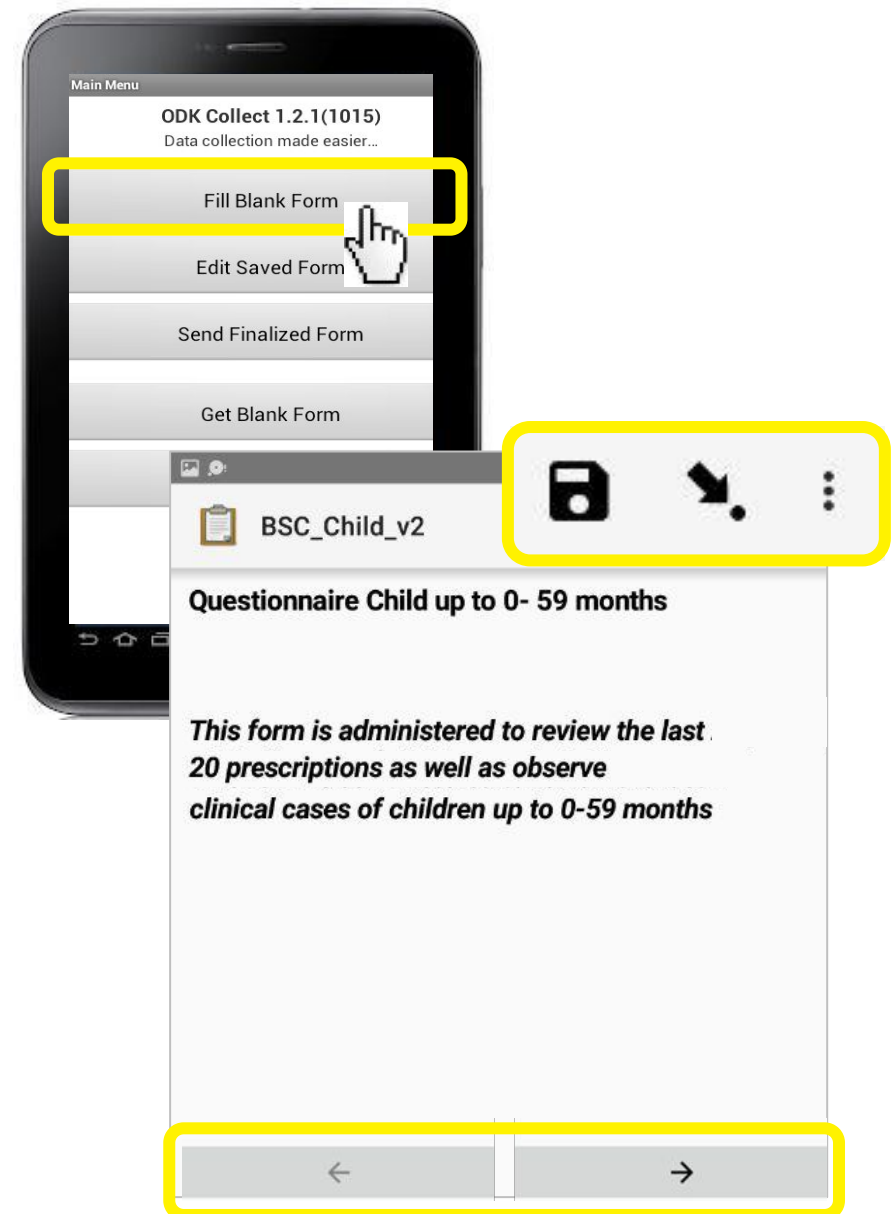
ODK SELECT AN ANSWER

This is an example of selecting one of the items on the form.
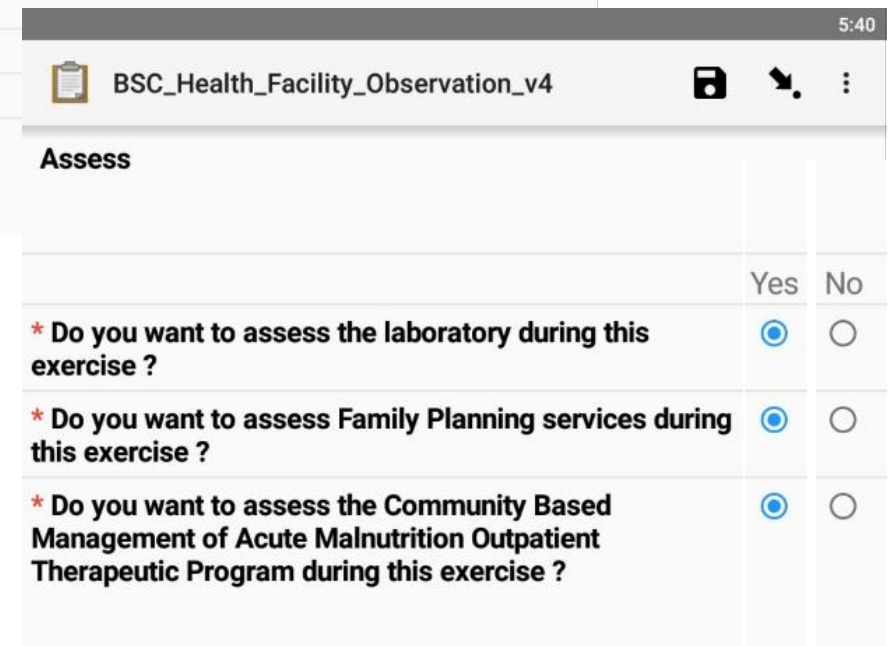
❯ When there is a circle (radio button), only one can be checked
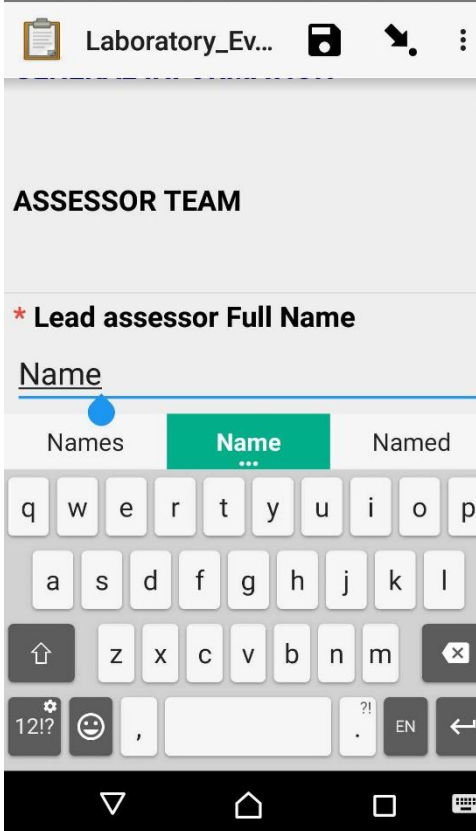
ODK ENTER NUMBERS/TEXT

This is an example of where an enumerator would fill out a form with text.

- The enumerator can use the key pad on the screen, or the phone key pad

- For some fields, **only** letters can be used, and for other fields, **only** numbers can be used
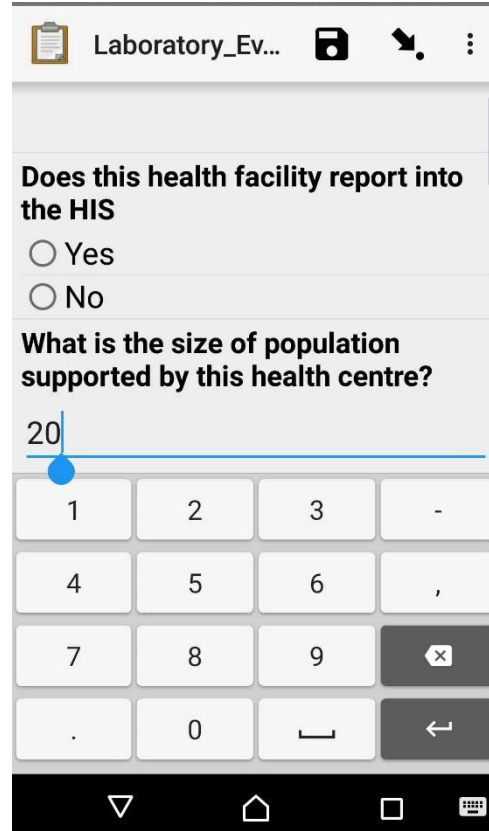
- Ranges can be set by managers

ODK MAIN MENU

You can review saved data, by pressing the "Edit Saved Form" button in the main menu

Once opened, you can directly go to a specific question with the arrow :
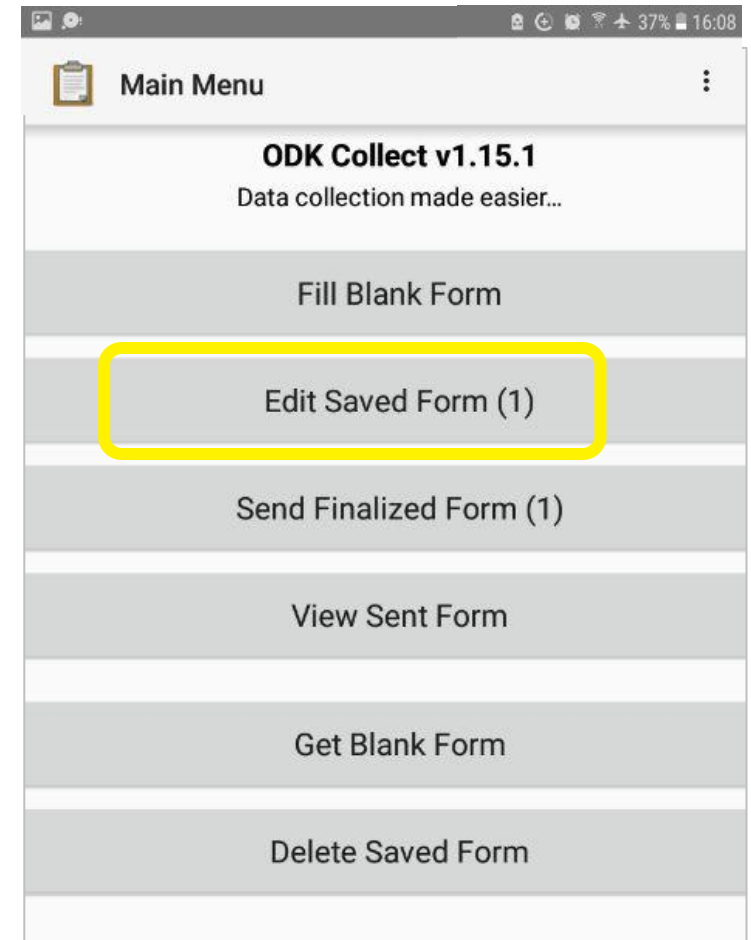
ODK MAIN MENU
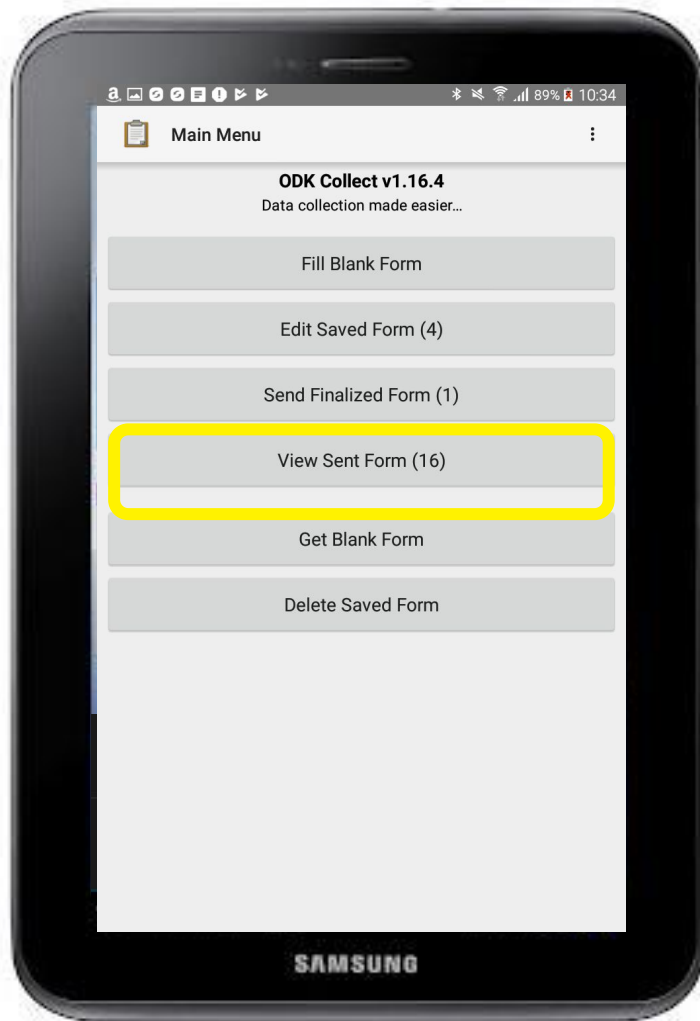
Send finalized form → To send a form to Kobo Server

Remember that to be able to send a form you must have marked it as finalized (last screen of form filling)
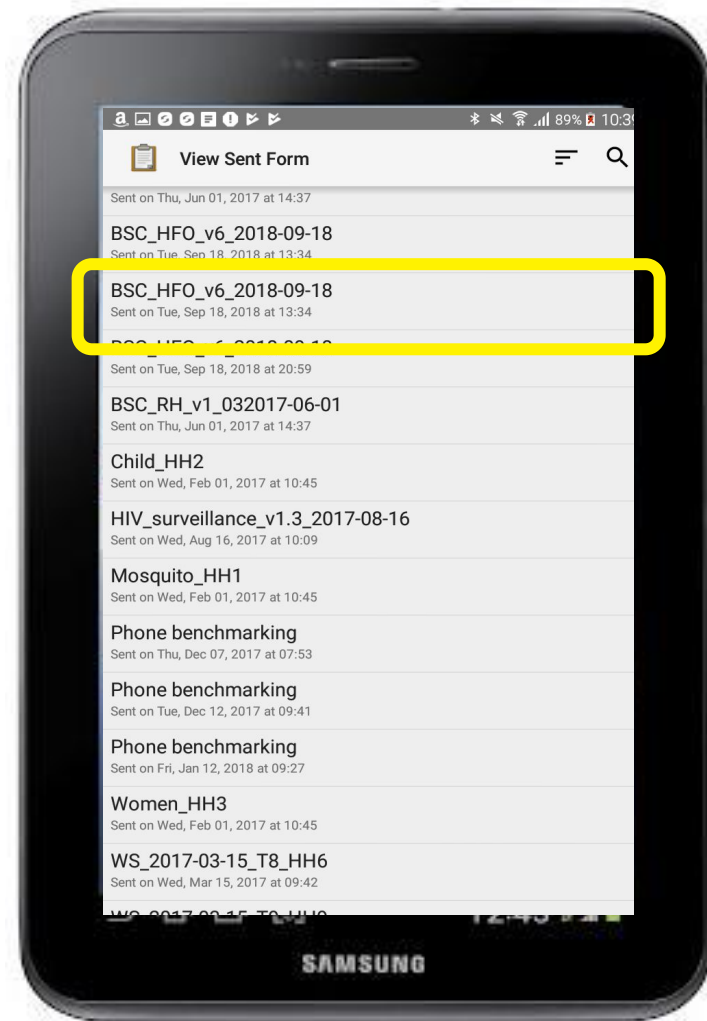
ODK MAIN MENU

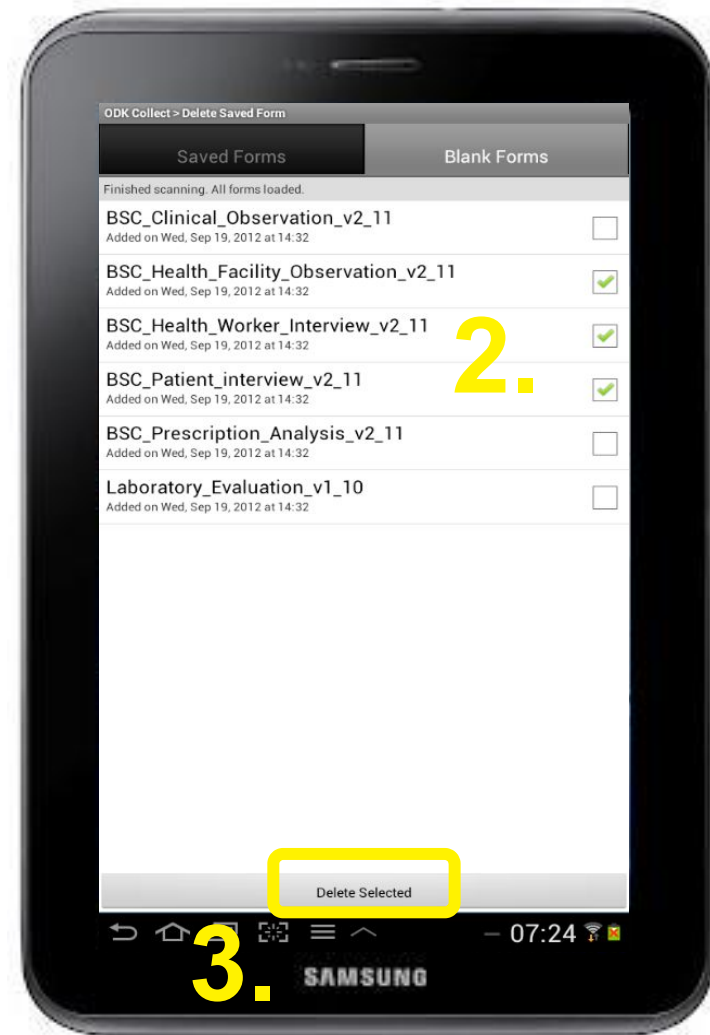**View sent form** → To view what you have sent to the server

ODK MAIN MENU

Delete saved form → To delete any tests or training data, must be used with cautious

DATA CHECKING

The forms have been set up so that many answers already contain crosscheck and balances.

》 They only accept answers of a certain range or combination.

However to improve the data, it is important to **review the forms before submitting**.

Only finalize the forms and make them ready for sending AFTER you/your supervisor has gone through the record once more to ensure all answers are correct.

Overview of the overall Process

1 Check HF bar code list, add new ones to Google sheet

2 Set up the tablet and download the forms

3 Train the surveyors (if applicable)

4 Conduct the survey

5 Review the data before submitting

6 Send the forms

Coming soon: Check your data on the dashboard.

BSC DASHBOARD

Access to the Dashboard