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

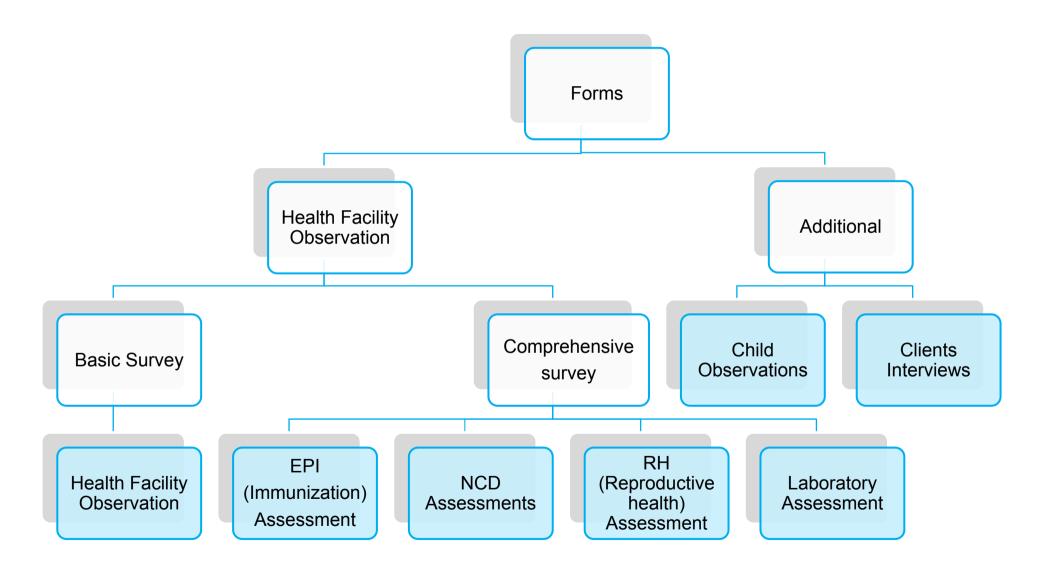


- Basic survey : Health Facility Observation
- Comprehensive survey : EPI (Immunization), NCD Assessments, RH (Reproductive health Assessment) and Laboratory Assessment

Additional

- Child Observation
- Clients Interviews

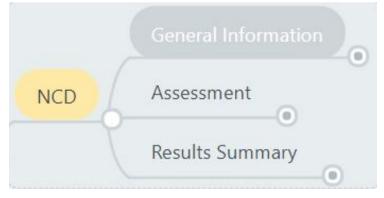
GLOBAL STRUCTURE



STRUCTURE OF THE FORMS

Each form is structured as follows:

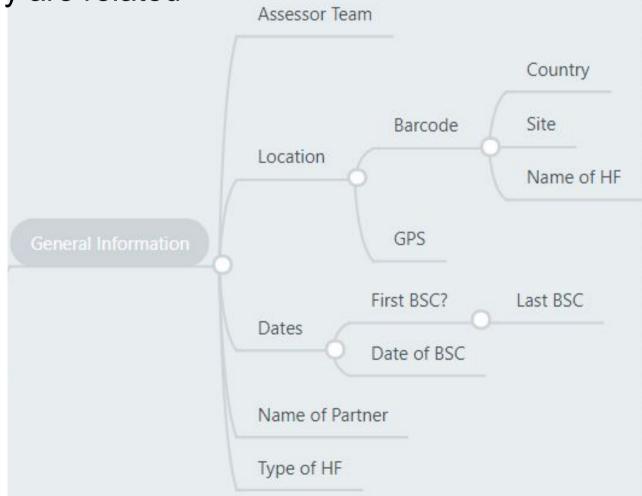
- A common section, "General Information" : necessary to identify the evaluation
- Assessment questions
- Results with indicators scores, based on the answers given during the assessment



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	GENERAL INFORMA	ATION
	ASSESSOR TEAM	
	* Lead assessor Fu	ll Name
	Is there another tea O Yes O No	am member to be added ?
A A Ø E © E G G & ● Basic_Health_Facility_Observ	≹ 💐 हि .।। 100% 🖻 13:24	A Ø E @ E E E & O ► ★ ≪ 😤 "II 100% D 13: Basic_Health_Facility_Observation_v6 🖬 🍡 ÷
1. STAFFING (1/2)		
Please enter the number of staff		Facility Infrastructure : 67 % Infection control supplies : 50 %
Please enter the number of staff If don't know enter 88 * OPD - Assigned Qualified Clinicians assessment(Nurses, Doctors, Clinica	al Officers, Physicial	Infection control supplies : 50 % Common equipment for consultations : 54 %
Please enter the number of staff If don't know enter 88 * OPD - Assigned Qualified Clinicians assessment(Nurses, Doctors, Clinica Assitants) Total * OPD - Assigned Qualified Clinicians	al Officers, Physicial s(Nurses, Doctors, Clinical t	Infection control supplies : 50 % Common equipment for consultations : 54 % Common : 54 %
Please enter the number of staff If don't know enter 88 * OPD - Assigned Qualified Clinicians assessment(Nurses, Doctors, Clinica Assitants) Total * OPD - Assigned Qualified Clinicians Officers, Physicial Assitants) Presen * OPD - Assigned Incentive Clinicians	al Officers, Physicial s(Nurses, Doctors, Clinical t s(Refugee/Unqualified)	Infection control supplies : 50 % Common equipment for consultations : 54 % Common : 54 % HIS : 0 % General medicine supply management : 91 % - General Medicines : 100 %

A GENERAL STANDARD SECTION

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



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)

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

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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!

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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.



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Basic_Health_Facility_Observation	n_v6 🖬 🍬 :
Check the following statement correct ? I entered the correct HF ID.	f not, check that you
* Country : Congo (DR)	
* Camp / Site : Goma	
* Health Facility Name: Murara PHC	
* Health Facility ID : 111CD22108721099	

 \rightarrow

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.

📋 Basic_Health 🖬 🍡 :	📋 Basic_Health 🖬 🍬 :	📋 Basic_Health 🖬 🍬 :
* LOCATION	* LOCATION	* LOCATION
Country	Name of camp/site	Name of health facility/site
○ Algeria	🔿 Kondi Mbaka	0
⊖ Angola	○ Brazzaville	○ Ikpengbele
○ Bangladesh	○ Pointe Noire	○ PS 15 Avril
○ Botswana	Not Associated with a site	○ PS Betikoumba
🔿 Burkina Faso	(Congo)	\bigcirc PS Boyele port
⊖ Burundi	○ Liranga	CMS Betou
○ Cameroon	○ Impfondo	○ PS Eboko
\bigcirc Central African Republic		○ PS Gaga
⊖ Chad		○ PS Nyamoba
Congo		○ PS Ite
∩ Congo (SQ)		∩ PS I ihoko

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			D 1 . :
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			

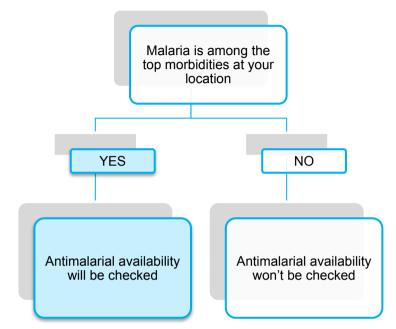
Depending on the skip patterns, indicators will adjust to reflect the local context.

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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.





LOOPS

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

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

BSC_Child_v6 SC_Child_v6 SC_Child_v6 SC_Child_v6 SC_Child_v6 SC_Child_v6 SC_Child_up to 0- 59 SC_Child_up to 0- 59 SC_Child_v6	BSC_Child_v6 🖬 🍬 : Clinical observation Child * CLINICAL OBSERVATION CHILD	* PRESC ACUTE H	Child_v6 RIPTION HEALTH C 5 CHILDRE
This form is administered to review the last 20 prescriptions as well as observe clinical cases of children up to 0-59 months	Enter the number of eligible clinical cases. Each case must meet the following criteria : Must be a sick child aged five years or below, and Must be seen for any one of the three following	being ob	nter the n served. Id nted clinic
	reasons 1 Malaria or Fever, 2 Acute Respiratory infection (ARI) or rapid or difficult breathing, 3	1	2
	Diarrhoea and Must be a new visit.	4	5
	Ideally observe 3 clinical cases	7	8
			0

ON ANALYSIS FOR **H CONDITION FOR** DREN he number of cases d. Ideally observe 20 linical cases. 3 $\langle \times \rangle$ 6 \sim 9 -63

LOOPS

FORM	LOOP	REQUIRED ENTRIES
Child up to 0- 59	Clinical observation Child up 0- 59 months	>= 3
months	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	Clinical observation	>= 3
NCD Assessment	Prescription analysis for NCD	>= 20
	Interview with caregivers of vaccinated infants	>= 5
Client Satisfactory	Client interview (> 5)	>= 5

GLOBAL RATE

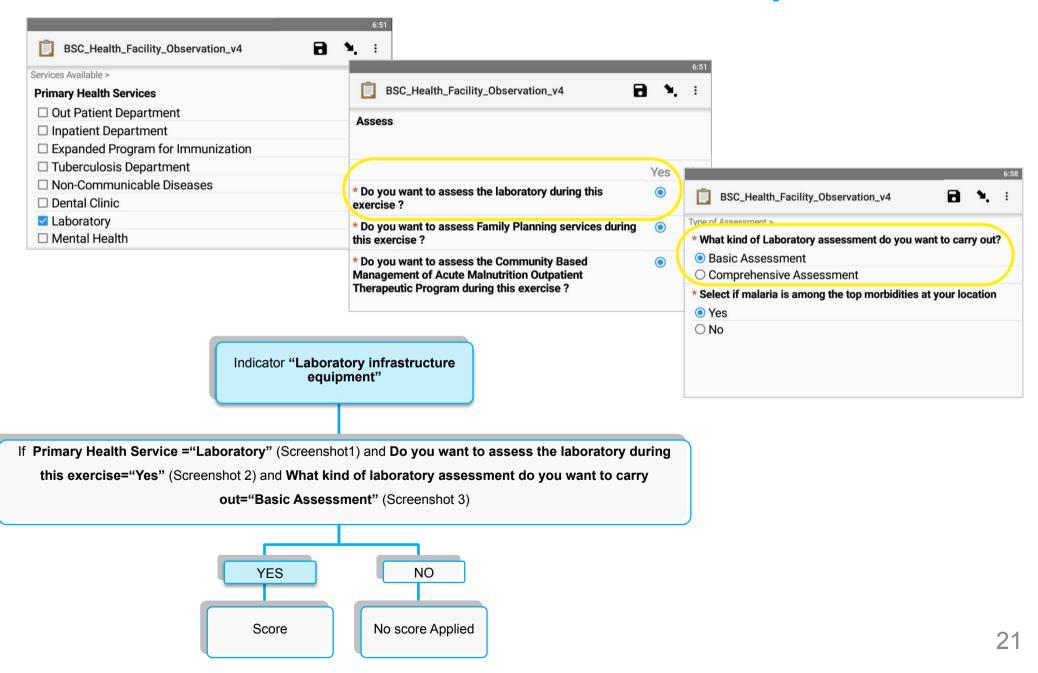
This is the average of indicators related to local context

<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.

📋 Basic_Health 🖬 🍡 :
RESULTS SUMMARY
Results at Facility by at :
Facility Infrastructure : 8 %
Infection control supplies : 0 %
Common equipment for consultations : 0 %
Common : 0 %

INDICATORS: Example



Basic Health Facility Observation

			Chaffin a	
🖾 🕨 😽 😤 "d 56% û 11:46			Staffing	
BSC_Health_Facility_Observation_v4			Facility Infrastructure	
RESULTS SUMMARY			Infection Control Supllies	
Results at Facility by Ggg at 2018-03-06 :			Laboratory	
			Common Equipment for Consultation	General
Staffing : 100 %				Dental
Facility Infrastructure : 95 %			Health Info System	
				General
Infection control supplies : 100 %		Assessment		
				HIV Medicines and supplies
Common equipment for consultations : 92 %			Medicines supply management	Skin desinfectants
				Dental medicines and consumables
Equipment for dental consultation : 80 %				Vaccines
Vacinas - 00 %				Medicine Management protocols
Vaccines : 80 %				medicine management protocols
HIS : 100 %	Desig health Facility Observation		General Facility Protocols	
	Basic health Facility Observation)	Supplementary fe	eding program
General Medicines : 68 %			Nutrition Therapeutic feeding	ng
Dental medicines : 100 %				22

Immunization

	¥! 1	ै <i>.</i> । 58%।	11:53
BSC_EPI_v2		D.	:
RESULTS SUMMARY			
Results at Facility CS Kirumbu by Yy at 2018-02-27	' :		
Cold Chain : 5 %			
Program quality : 0 %			
GLOBAL RATE : %			



NCD Assessments

i 🖹 🖻 🕨 🕷 🕷 62% 🖬 12:03
iii BSC_NCD_v2 iii № :
RESULTS
Observation at at Facility by Uu at 2018-03-06 :
EQUIPMENT FOR NCD CONSULTATIONS : 100 %
NCD MEDICINE AND CONSUMABLES : 100 %
NCD PROTOCOLS : : 82 %
CLINICAL OBSERVATION : 73 %
PRESCRIPTION ANALYSIS FOR NCD : 75 %
GLOBAL RATE : 86 %

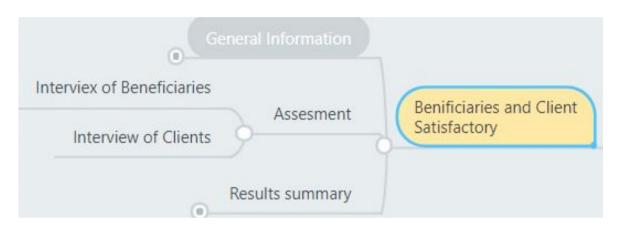
Reproductive Health Assessment

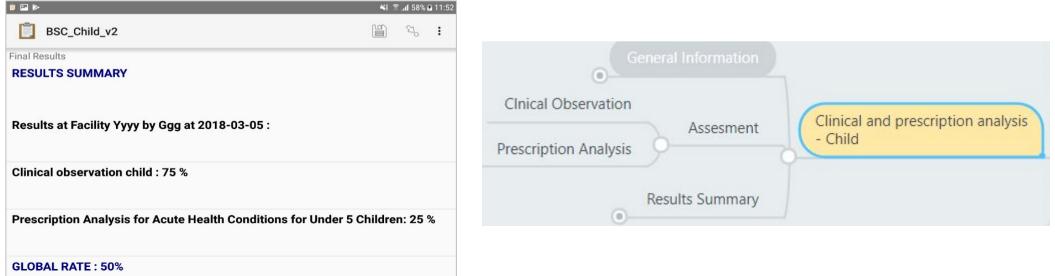
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BSC_RH_v2 □ ℃ ·	
BASIC RH PROTOCOLS : 67 %	General Information
PROTOCOLS : 88 %	Basic Reproductive Health Protocols
Detailed Reproductive Health/HIV Protocols : 85 %	RH Protocols/Guidelines
Referrals : 100 %	RH Medicines
Maternal nutrition : 100 %	RH Assessment
RH MEDICINES : 67 %	Equipment for RH Consultations
	RH HIS
RH EQUIPMENT : 100 %	
RH HIS : 100 %	RH Clinical Observations
ANC OBSERVATIONS : 73 %	Results Summary
PNC OBSERVATIONS : 71 %	
GLOBAL RATE : 81 %	

Laboratory assessment

7:35		
Laboratory_Evaluation_v2		
S SUMMARY		
esults at Facility by test at 2018-08-08 :		
ENERAL CONDITIONS OF THE LABORATORY STRUCTURE : 50 %		
TILITIES AND LABORATORY STRUCTURE: 42 %		
IOSAFETY, HYGIENE and SECURITY : 75 %	2 Image: Construction 2 Image: Construction 018-08-08 : Image: Construction E LABORATORY STRUCTURE : 50 % Image: Construction STRUCTURE: 42 % Image: Construction Biosafety, Hygiene and Secure Image: Construction Utilities and Lab Structure Image: Construction Biosafety, Hygiene and Secure Image: Construction Specimen Collection, Handling	
PECIMEN COLLECTION, HANDLING and RECORDING : 67 %		
NALYSIS AND TEST PERFORMED : 39 %	Assessment	-6
ABORATORY STAFF AND WORKING TIME : 100 %		
EPORTING, SURVEILLANCE, ANALYSIS and COMMUNICATION : 88 %		
UALITY ASSURANCE : 48 %		
UTBREAKS - OUTBREAK PARTICIPATION : 50 %		
LOBAL RATE : 59 %		

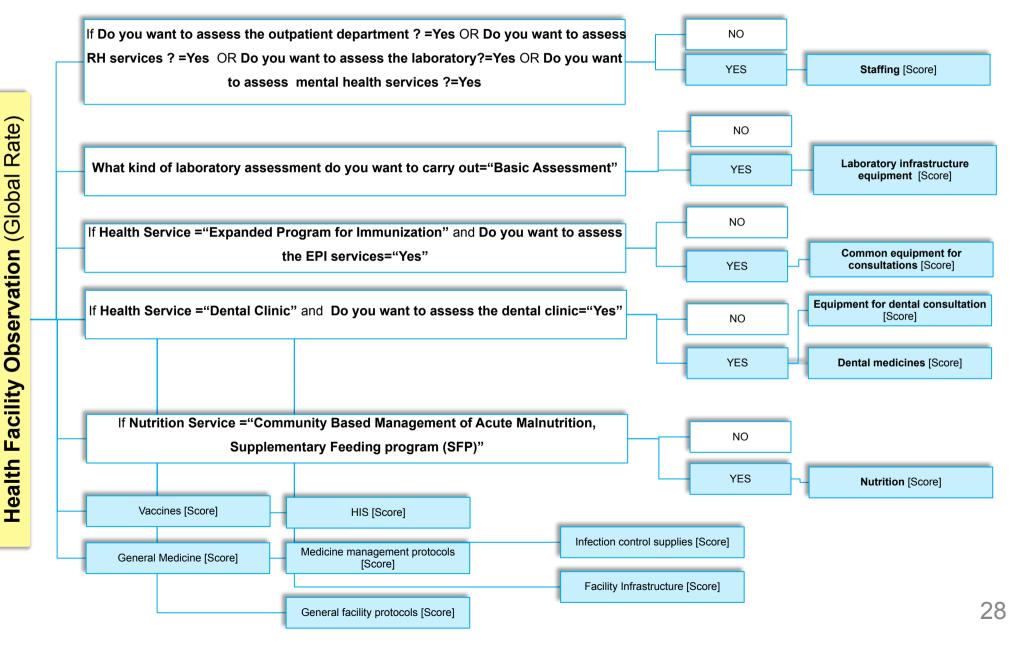
			7:52
BSC_ClientInterview_v4	8	٩.	:
RESULTS SUMMARY			
Results at Facility by test at 2018-08-03 :			
BENIFICIARIES SATISFACTION SCORE : 54 %			
GENERAL CLIENTS SATISFACTION SCORE : 47 %			
GLOBAL : 51 %			





INDICATORS

Health Facility Observations



INDICATORS

LABORATORY ASSESSMENT

General conditions of the laboratory structure

Utilities and laboratory structure

Biosafety, hygiene and security

Specimen collection, handling and recording

Equipment and supplies

Reagents and supply

Analysis and test performed

Laboratory staff and working time

Reporting, surveillance, analysis and communication

Quality assurance

Outbreaks - outbreak participation

Global rate

REPRODUCTIVE HEALTH ASSESSMENT

Basic rh protocols

Advanced Protocols

Detailed reproductive

Health/HIV protocols

Referrals

Maternal nutrition

Rh medicines

Rh equipment

Rh his

Anc observations

Pnc observations

Global rate

NCD ASSESSMENTS

Equipment for ncd consultations

Ncd medicine and consumables

Ncd protocols

Clinical observation

Prescription analysis for ncd

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.

IMMUNIZATION

Program guality

Observation of EPI session

Cold chain

Global rate

 Global rate of RH assessment bases its mean on advanced protocols synthesis plus other indicators but doesn't use the more detailed assessments.

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

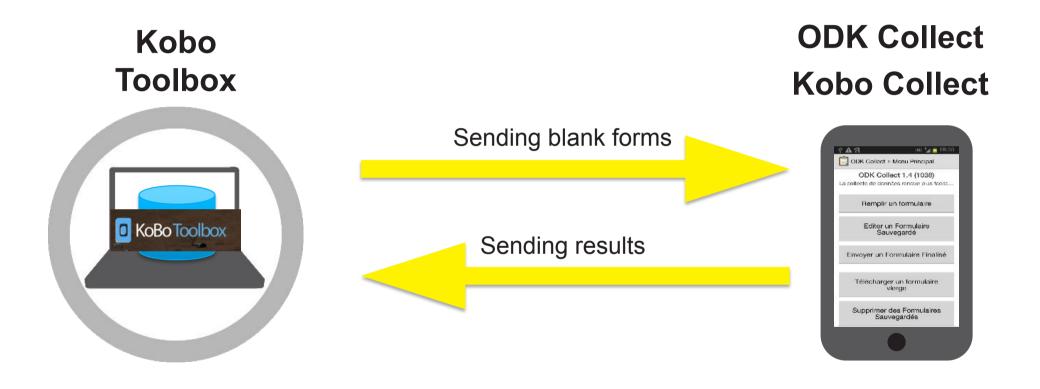
Global rate

Global rate

PREPARING THE TABLET

OVERVIEW OF TOOLS

ODK/Kobo Collect + Kobo Toolbox



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

TABLET SETTINGS Energy consumption

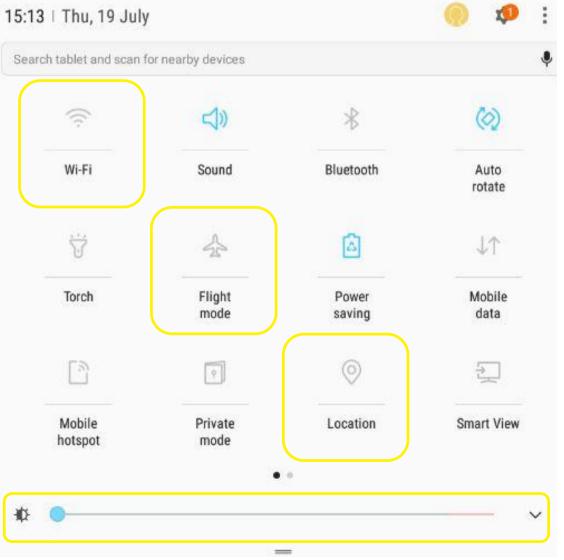
To save energy when not using it

- WIFI OFF
- Flight mode ON
- GPS OFF

To save energy when using it

• Lower luminosity of the display

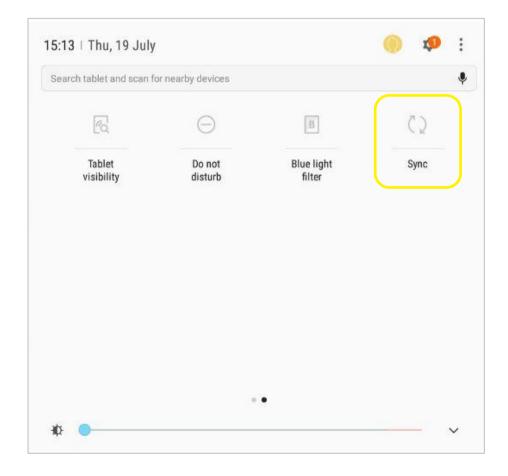
You might need to adapt it depending on your environment, in dark rooms it is ok to have luminosity at its lowest, whilst being outside in full light you might need to increase luminosity.



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





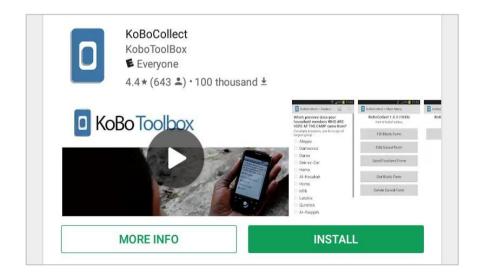
To be installed

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

You can find them on : <u>Play store</u>, <u>ODK</u>

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

2. Download Kobo/ODK Collect and run installation



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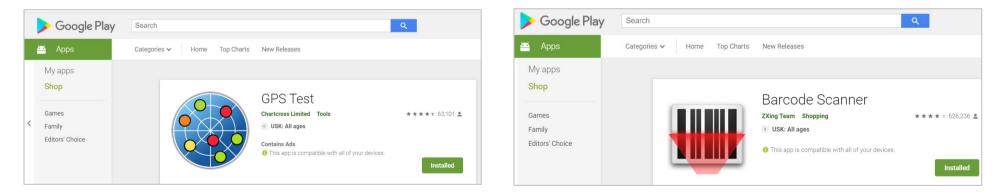
APPLICATIONS

To be installed

Install the following as well

- <u>GPS test</u>: faster/more accurate acquisition of location for GPS readings
- <u>Barcode Scanner</u>: 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.

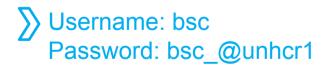
➢ The available settings will be categorized into 'mandatory/highly recommended' and 'good to know' categories.

Û	Main Menu	:
	ODK Collect v1.15.1 Data collection made easier	
	Fill Blank Form	
	Edit Saved Form (1)	
	Send Finalized Form (1)	
	View Sent Form	
	Get Blank Form	
	Delete Saved Form	

SETTINGS MANDATORY AND HIGHLY RECOMMENDED

In General Settings > Server

Define your Kobo server access https://kobocat.unhcr.org



	Server Settings	
Type ODk	Aggregate	
	Aggregate settings	
URL		
Use	mame	

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.

V 🗸 🗸	ť
Ē	User interface
The r Ligh	ne t theme
Lang Engl	guage ish
Text Med	font size lium
	gation forward/backward buttons
•	sh screen ws when application starts
	cted splash image nut d'ODK
Мар	ping
-	ping SDK
Ope	nStreetMap SDK

SETTINGS MANDATORY AND HIGHLY RECOMMENDED

In General Settings > Form management

"Auto send with WIFI" \rightarrow uncheck it

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

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

Form update

Finalize forms on import

Affects forms added directly to instances folder

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	

 \checkmark

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

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Main Menu Settings		
Uncheck to hide from Main Menu		
Edit Saved Form		~
Send Finalized Form		
View Sent Form		
Get Blank Form		
Delete Saved Form		\checkmark

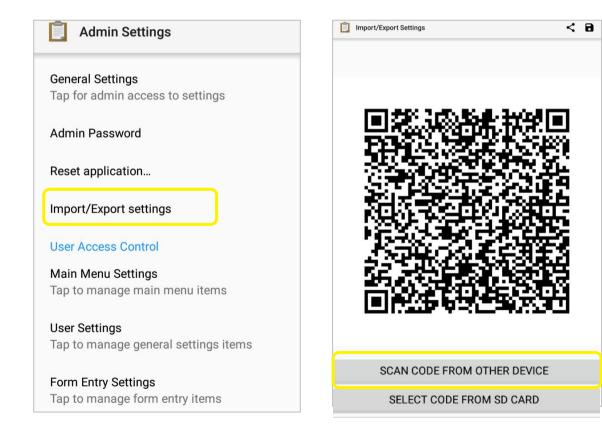
Under "Admin settings" you can set other parameters, and hide some features from enumerators (deleting forms etc)

SETTINGS GOOD TO KNOW

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:

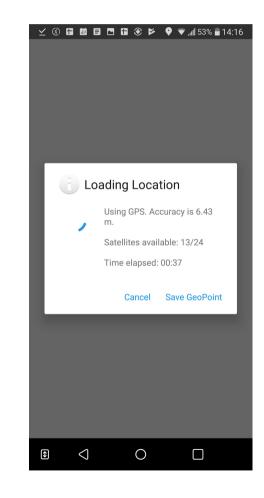
- Date and time of the tablet
- **GPS** is working Launch GPS Test and check the app finds a position with less than 10 meters accuracy (from ODK version 1.16 and up you can see the number of satellites).

 \sum 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



GET BLANK FORMS

Download the forms you need on your tablet

llect > Main Menu			ODK Collect > Get Bl		
ODK Collect 1.2.1(1015) Data collection made easier			BSC_Clinica ID: BSC_Clinical_Ot	I_Observation_v2_11 bservation_v2_11	~
Fill Blank Form		∠.	BSC_Health_ ID: BSC_Health_Fac	_Facility_Observation_v2_11 cility_Observation_v2_11	~
			BSC_Health_ ID: BSC_Health_Wo	_Worker_Interview_v2_11 vrker_Interview_v2_11	
Edit Saved Form			BSC_Patient	t_interview_v2_11	
Send Finalized Form		5	BSC_Prescri	iption_Analysis_v2_11	 Image: A start of the start of
Get Blank Form	- Dec	1	Laboratory	Evaluation_v1_10	
Delete Saved Form	d)				
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	Data collection made easier Fill Blank Form Edit Saved Form Send Finalized Form Get Blank Form Delete Saved Form	Data collection made easier Fill Blank Form Send Finalized Form Get Blank Form Delete Saved Form	Data collection made easier Fill Blank Form Cet Blank Form Delete Saved Form	Fill Blank Form Edit Saved Form Send Finalized Form Get Blank Form Delete Saved Form	Data collection made easier Fill Blank Form Edit Saved Form Get Blank Form Delete Saved Form Delete Saved Form Total Collection (Debervalor), v2, 11 BSC, Health, Facility, Observation, v2, 11 BSC, Health, Facility, Observation, v2, 11 BSC, Health, Facility, Observation, v2, 11 BSC, Health, Worker, Interview, v2, 11 Delete Saved Form Comparison Total Collection Collection <

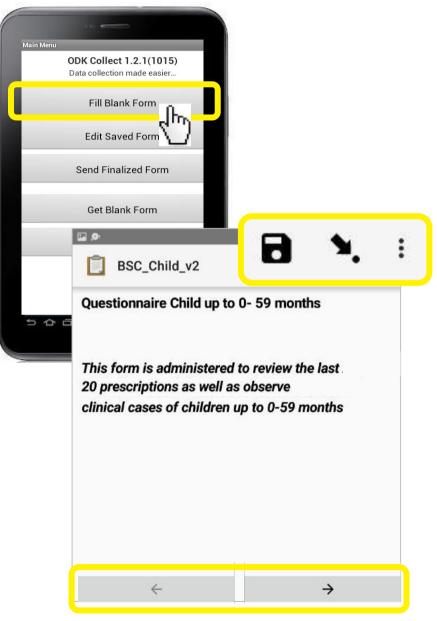
ODK FORM FILLING OPTIONS

Fill Blank form \rightarrow 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
 - $\sum \quad \begin{array}{l} \mbox{Very useful when you want to reread a form} \\ \mbox{or filling it where you stopped} \end{array}$
- 3 dots for changing language

At the bottom \rightarrow 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.

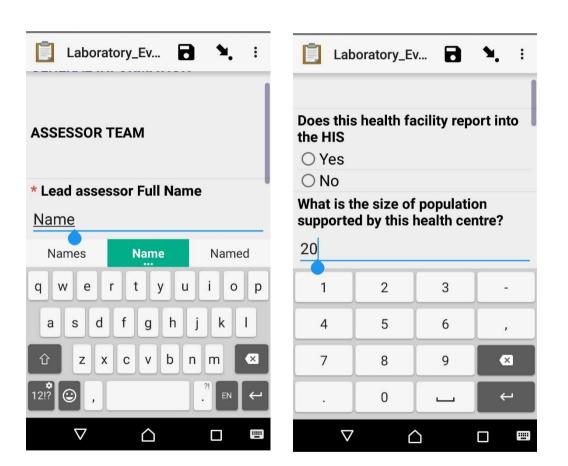
 \mathbf{N}

		5:40		
	BSC_Child_v2	D 1 . :		
is an example of	* LOCATION			
ting one of the items	Name of camp/site			
	○ Other			
e form.	○ Mborgop			
	💿 Ngam			5:40
		BSC_Health_Facility_Observation_v4		
	○ Minawao	BSC_Health_Facility_Observation_v4	У.	:
	○ Mbile	Assess		
			Yes	No
When there is a circle (radio button), only one can be checked		* Do you want to assess the laboratory during this exercise ?	۲	0
		* Do you want to assess Family Planning services during this exercise ?	۲	0
		* Do you want to assess the Community Based Management of Acute Malnutrition Outpatient Therapeutic Program during this exercise ?	۲	0

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



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

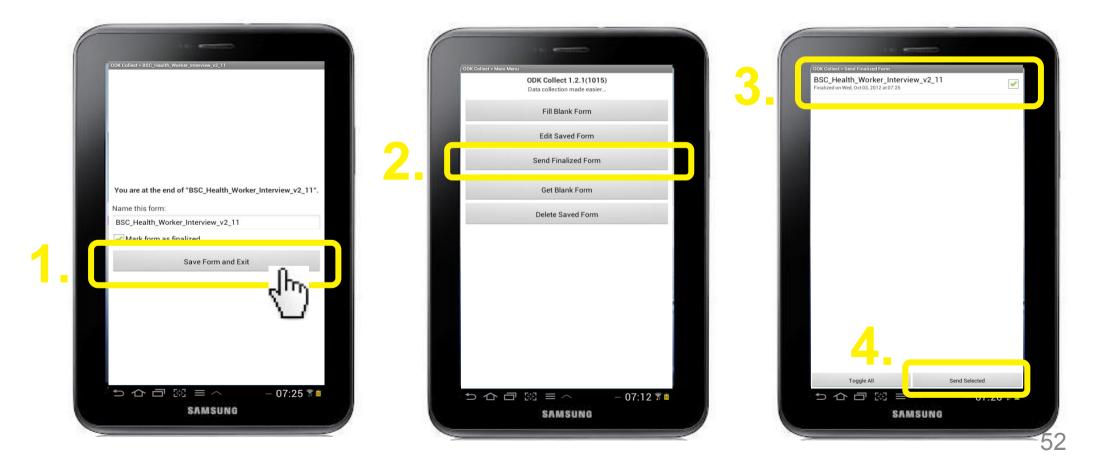
Once opened, you can directly go to a specific question with the arrow :



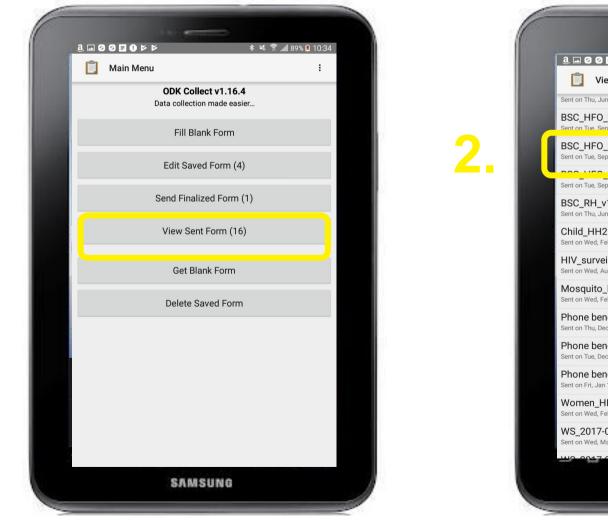
2 Ø 2 (🕀 🗑 😤 🛧 37% 🛢 16:08
📋 Main Menu	:
ODK Collect v1.15.1 Data collection made easie	r
Fill Blank Form	
Edit Saved Form (1)	
Send Finalized Form (1)
View Sent Form	
Get Blank Form	
Delete Saved Form	

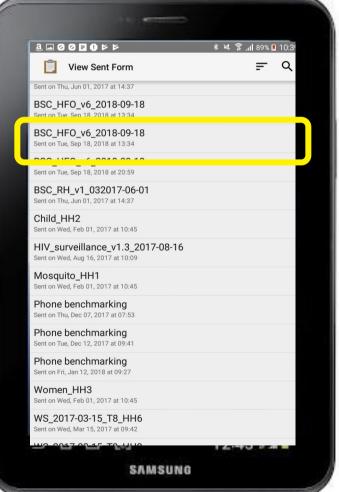
Send finalized form \rightarrow To send a form to Kobo Server

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



View sent form \rightarrow To view what you have sent to the server





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

	1 k	
	ODK Collect > Main Menu	
	ODK Collect 1.2.1(1015)	
	Data collection made easier	
	Fill Blank Form	
100	Edit Saved Form	
- 10	Send Finalized Form	
	Get Blank Form	
	Delete Saved Form	

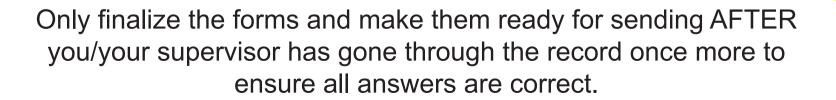


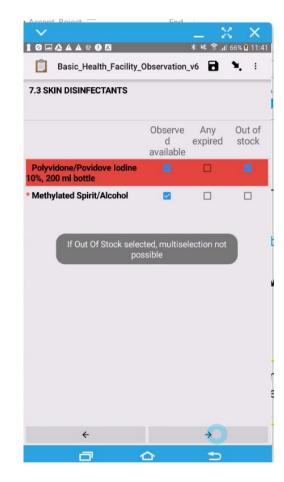
DATA CHECKING

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

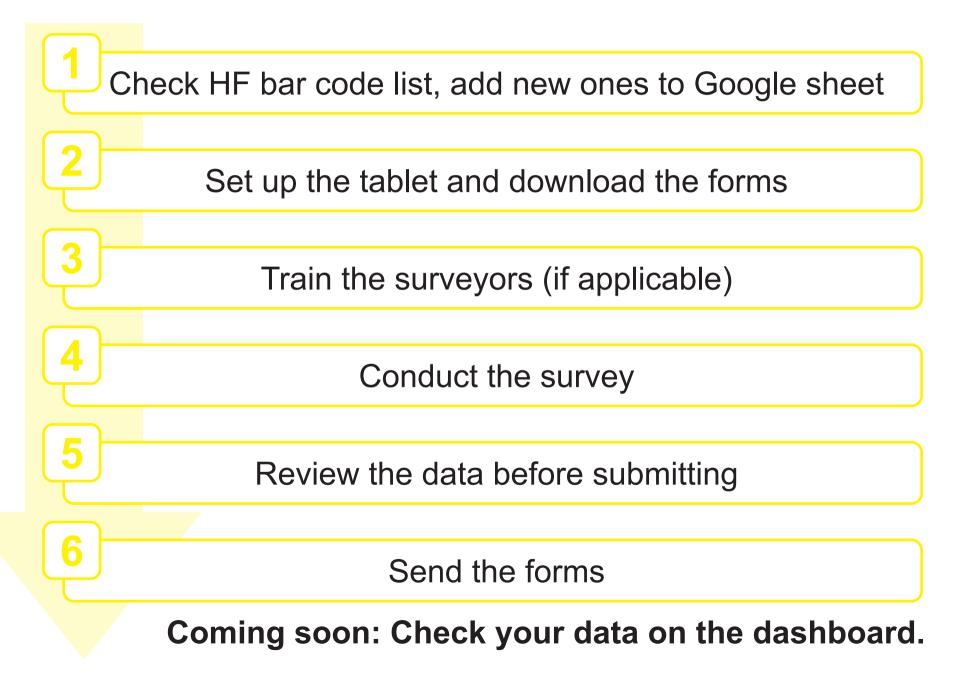
They only accept answers of a certain range or combination.

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

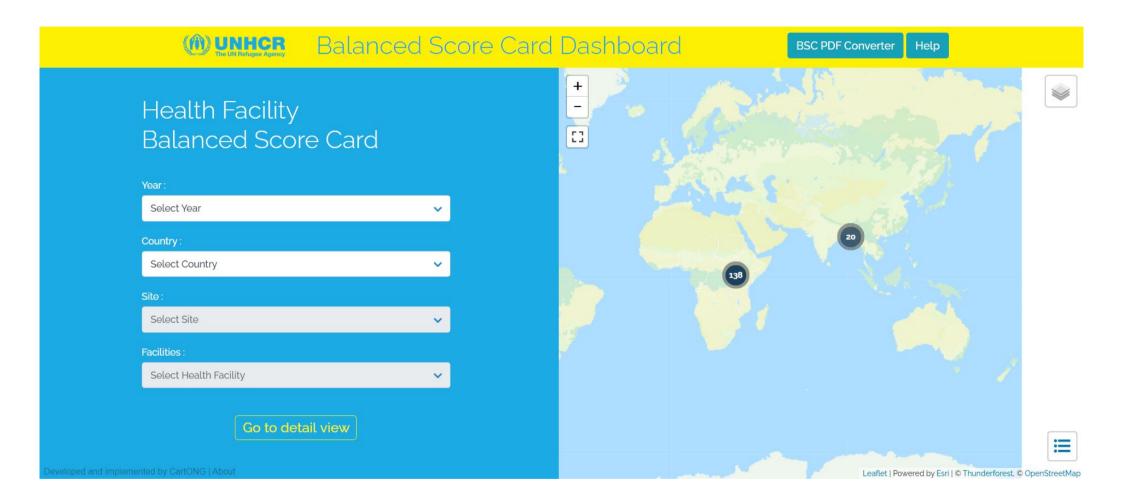




Overview of the overall Process



BSC DASHBOARD



Access to the Dashboard