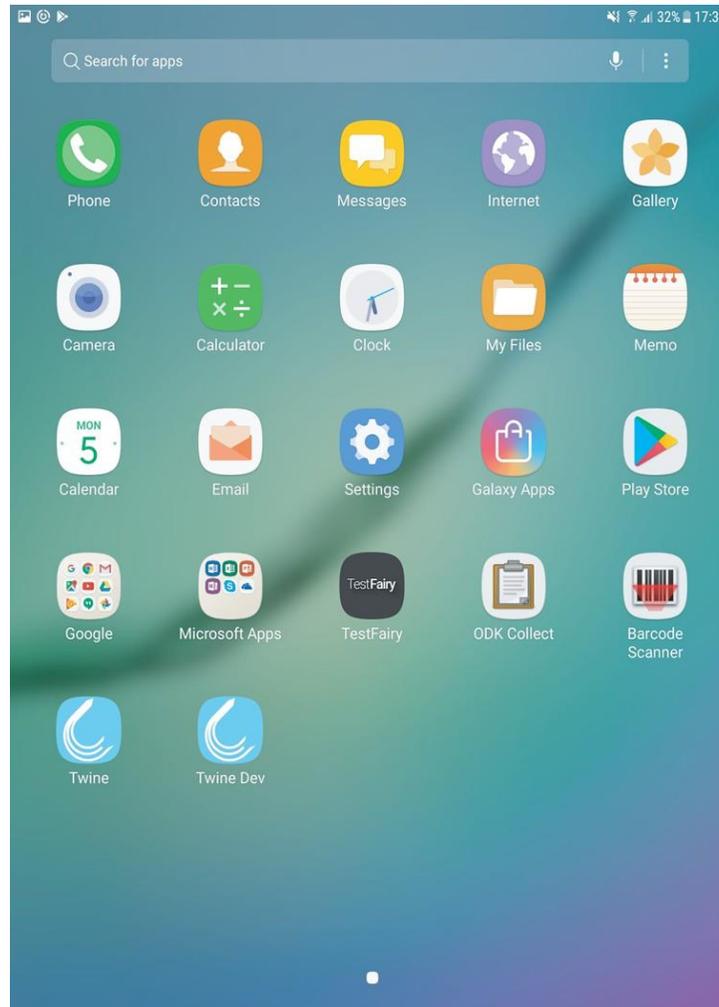


BALANCED SCORE CARD

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

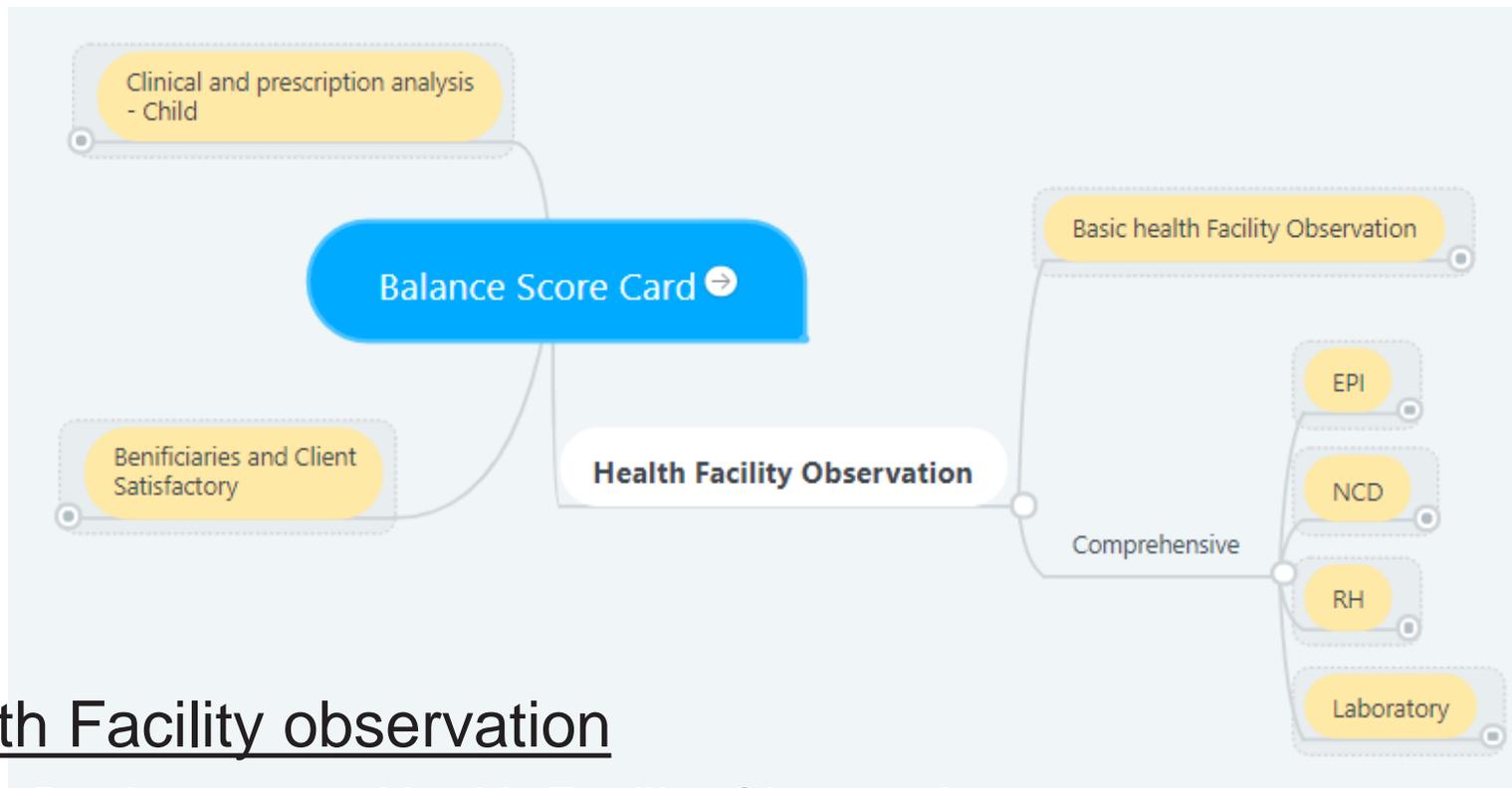


WHERE CAN IT BE USED?

- Camps
- Urban settings
- High income settings
- Low income settings
- Emergency situations
- Protracted situations

HOW IS THE SURVEY
STRUCTURED?

GLOBAL STRUCTURE



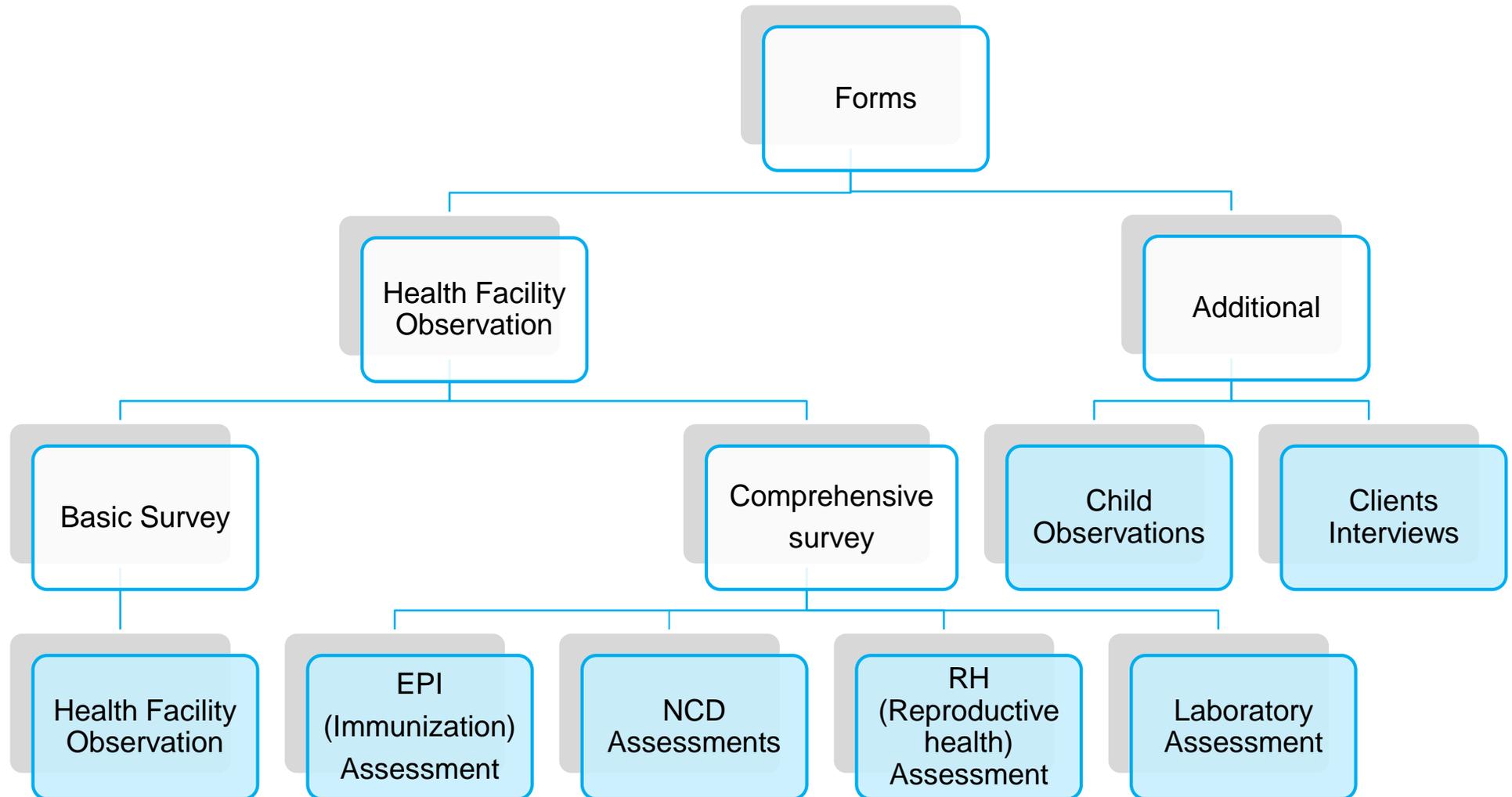
Health Facility observation

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

Additional

- Child Observation
- Clients Interviews

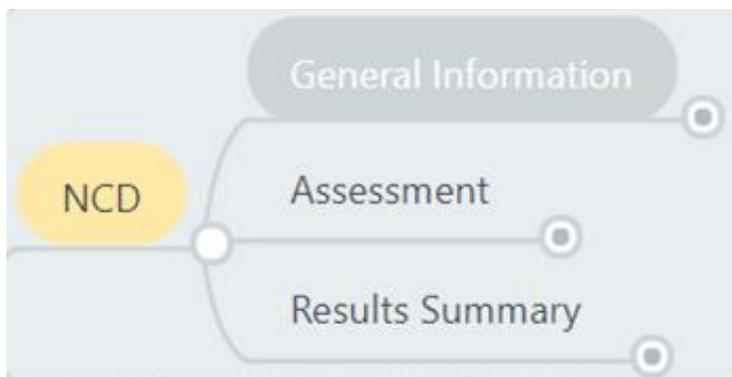
GLOBAL STRUCTURE



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



1

Basic_Health_Facility_Observation_v6

GENERAL INFORMATION

ASSESSOR TEAM

* Lead assessor Full Name

Is there another team member to be added ?

Yes

No

2

Basic_Health_Facility_Observation_v6

1. STAFFING (1/2)

Please enter the number of staff
If don't know enter 88

* OPD - Assigned Qualified Clinicians at time of assessment(Nurses, Doctors, Clinical Officers, Physical Assitants) Total

* OPD - Assigned Qualified Clinicians(Nurses, Doctors, Clinical Officers, Physical Assitants) Present

* OPD - Assigned Incentive Clinicians(Refugee/Unqualified) Total

* OPD - Assigned Incentive Clinicians(Refugee/Unqualified) Present

* Midwives Assigned to work at time of assessment Total

3

Basic_Health_Facility_Observation_v6

Facility Infrastructure : 67 %

Infection control supplies : 50 %

Common equipment for consultations : 54 %
Common : 54 %

HIS : 0 %

General medicine supply management : 91 %

- General Medicines : 100 %

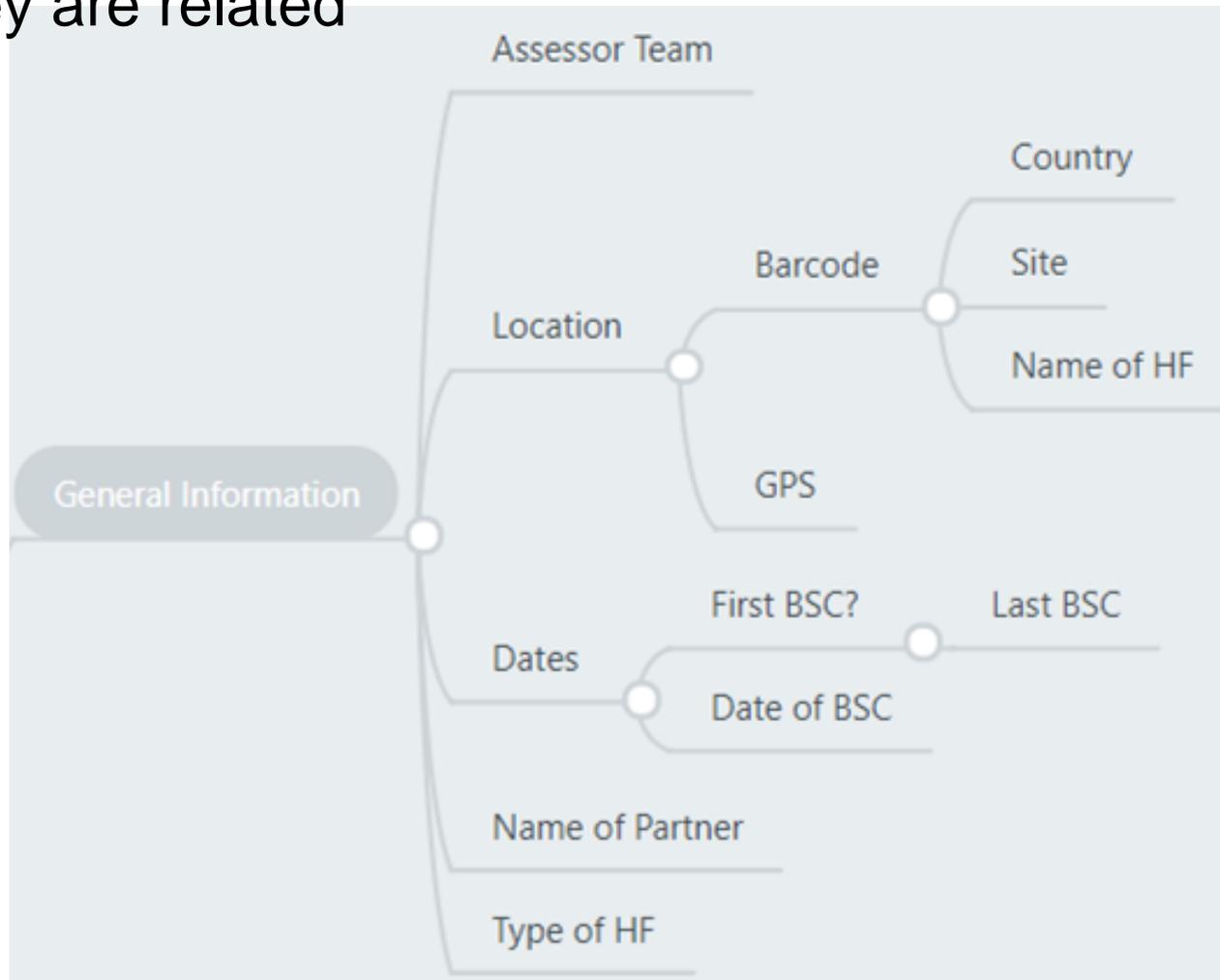
- Medicine management protocols: 50 %

General facility protocols : 78 %

Global rate : 63 %

A GENERAL STANDARD SECTION

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

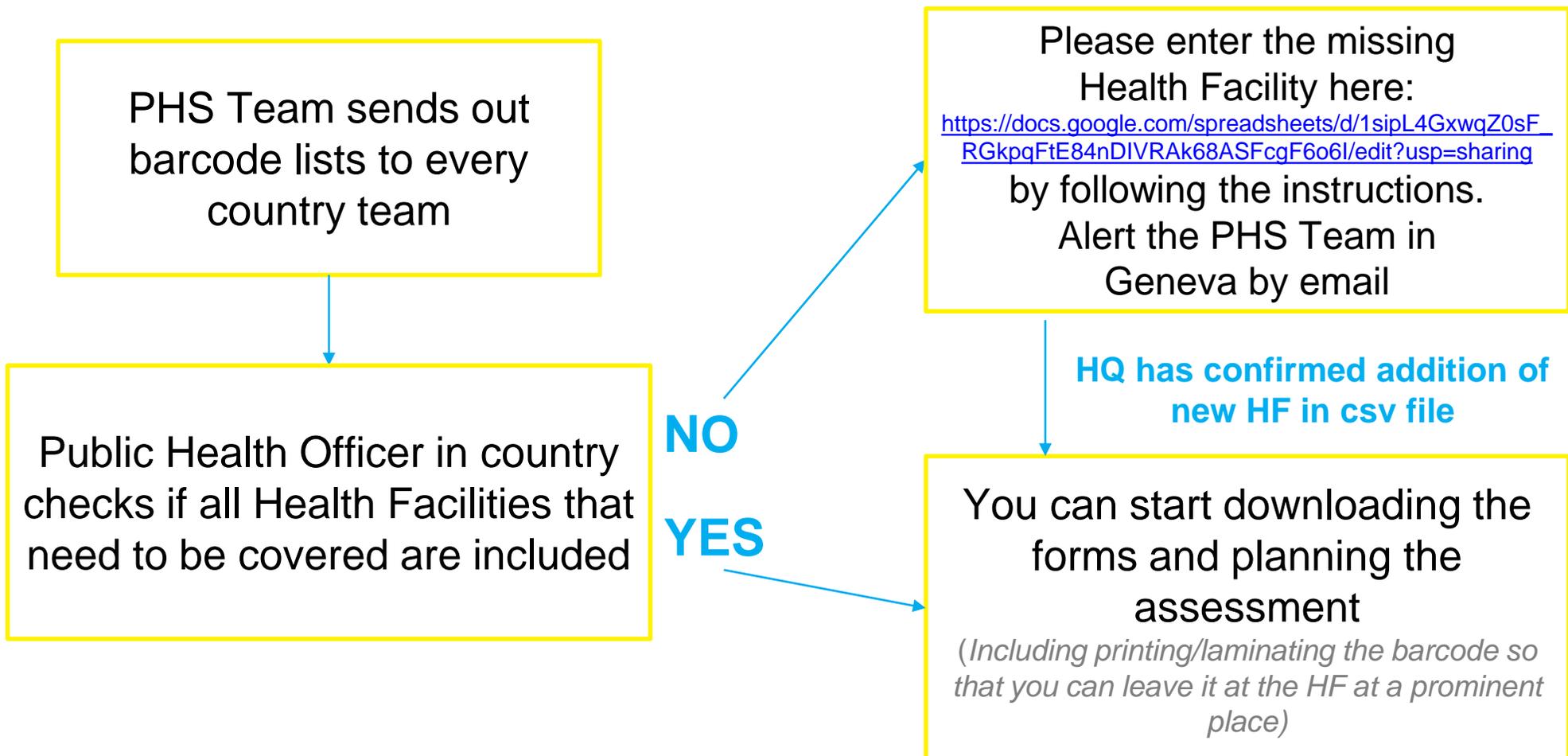


HEALTH FACILITY ID, LINKING QUESTIONNAIRES

HEALTH FACILITY ID

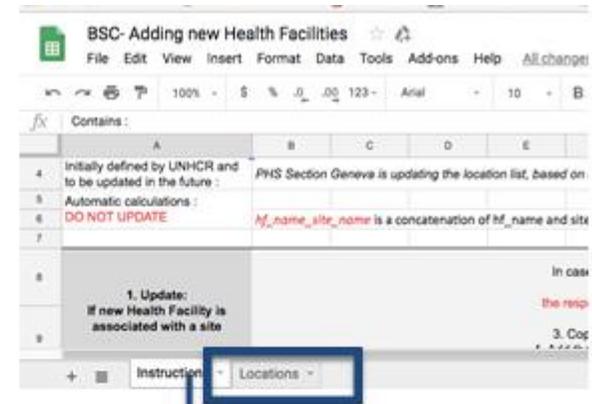
In order to link the different questionnaires together for the overall scoring on the BSC Dashboard and any other analysis, a unique Health Facility ID needs to be used.

PROCESS



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



	A	B	C	D
1	hf_name	hf_code_IS	site_name	site_name (edited)
2			Algiers	Algiers
3			Tindouf	Tindouf
4			Awserd camp	Awserd camp
5			Dakhia camp	Dakhia camp
6			Laayoune camp	Laayoune camp
7			Smara camp	Smara camp

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 country, a camp/site, and a Health Facility.

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 *

his@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.

Basic_Health_...

* LOCATION

Country

- Algeria
- Angola
- Bangladesh
- Botswana
- Burkina Faso
- Burundi
- Cameroon
- Central African Republic
- Chad
- Congo
- Congo (DR)

Basic_Health_...

* LOCATION

Name of camp/site

- Kondi Mbaka
- Brazzaville
- Pointe Noire
- Not Associated with a site (Congo)
- Liranga
- Impfondo

Basic_Health_...

* LOCATION

Name of health facility/site

-
- Ikpengbele
- PS 15 Avril
- PS Betikoumba
- PS Boyele port
- CMS Betou
- PS Eboko
- PS Gaga
- PS Nyamoba
- PS Ite
- PS Iihoko

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ibuprofen 200 mg			
* Ibuprofen 400 mg	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
* Paracetamol 100 mg	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
* Paracetamol 500 mg	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

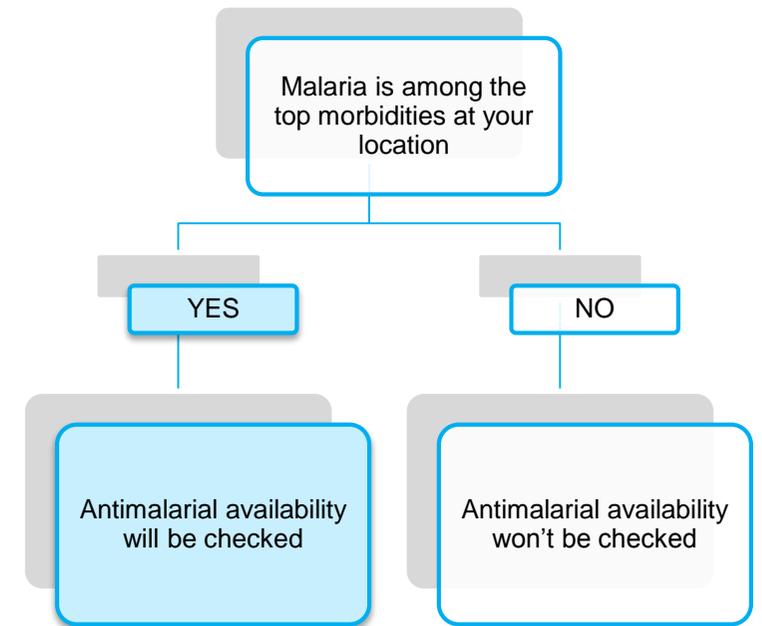
SCORES & INDICATORS

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.



The screenshot shows a mobile application interface. At the top right, the time is 6:20. Below the title bar, there is a clipboard icon and the text "BSC_Health_Facility_Observation_v4". Below this, there is a "Type of Assessment >" section. A red asterisk indicates a required question: "Select if malaria is among the top morbidities at your location". There are two radio button options: "Yes" (which is selected) and "No".

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.

BSC_Child_v6

Questionnaire Child up to 0- 59 months

This form is administered to review the last 20 prescriptions as well as observe clinical cases of children up to 0-59 months

BSC_Child_v6

Clinical observation Child

*** CLINICAL OBSERVATION CHILD**

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 reasons 1 Malaria or Fever, 2 Acute Respiratory infection (ARI) or rapid or difficult breathing, 3 Diarrhoea and Must be a new visit.

Ideally observe 3 clinical cases

BSC_Child_v6

*** PRESCRIPTION ANALYSIS FOR ACUTE HEALTH CONDITION FOR UNDER 5 CHILDREN**

Please enter the number of cases being observed. Ideally observe 20 documented clinical cases.

1 2 3

4 5 6

7 8 9

0

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

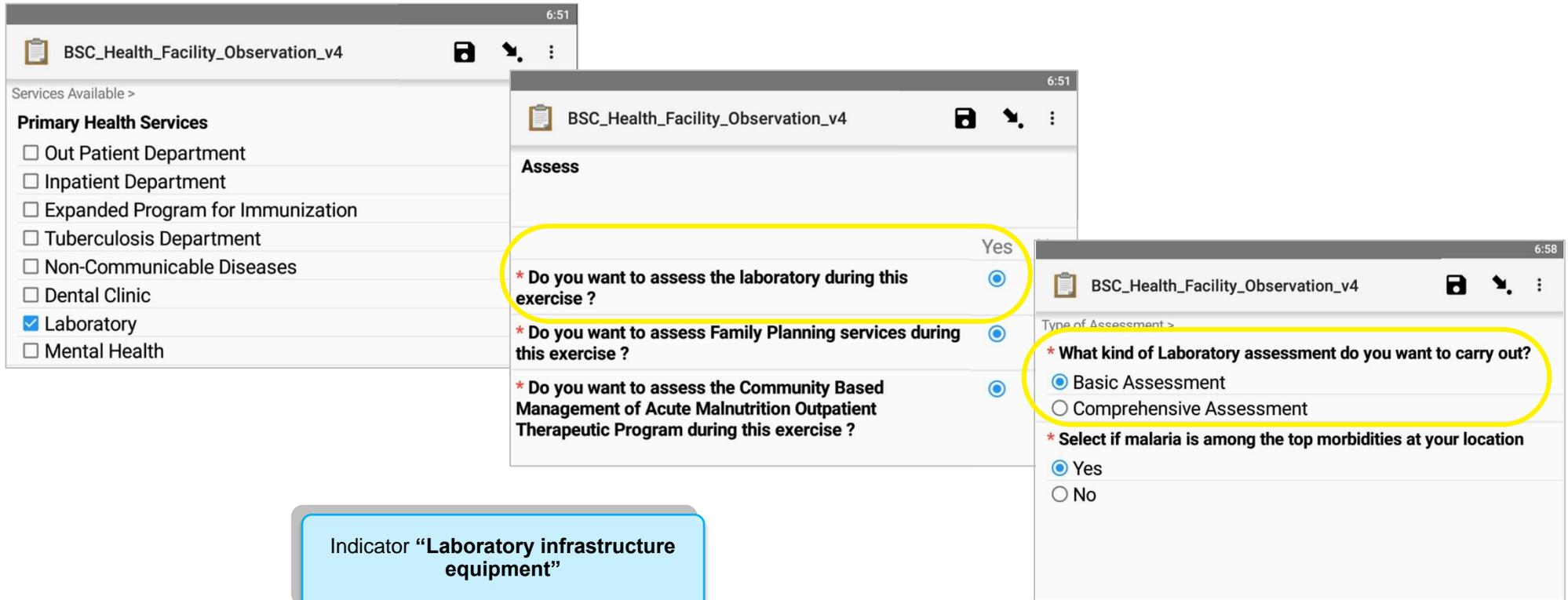
GLOBAL RATE

This is the average of indicators related to local context

- » Example Basic Health Facility Observation:
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.

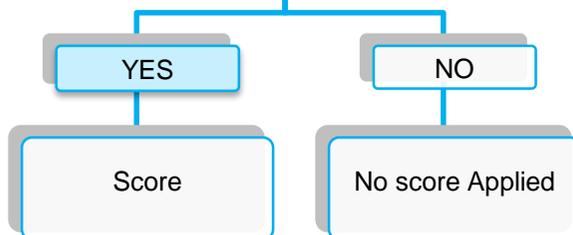
RESULTS SUMMARY	
Results at Facility by at :	
Facility Infrastructure	: 8 %
Infection control supplies	: 0 %
Common equipment for consultations	: 0 %
Common	: 0 %

INDICATORS: Example



Indicator "Laboratory infrastructure equipment"

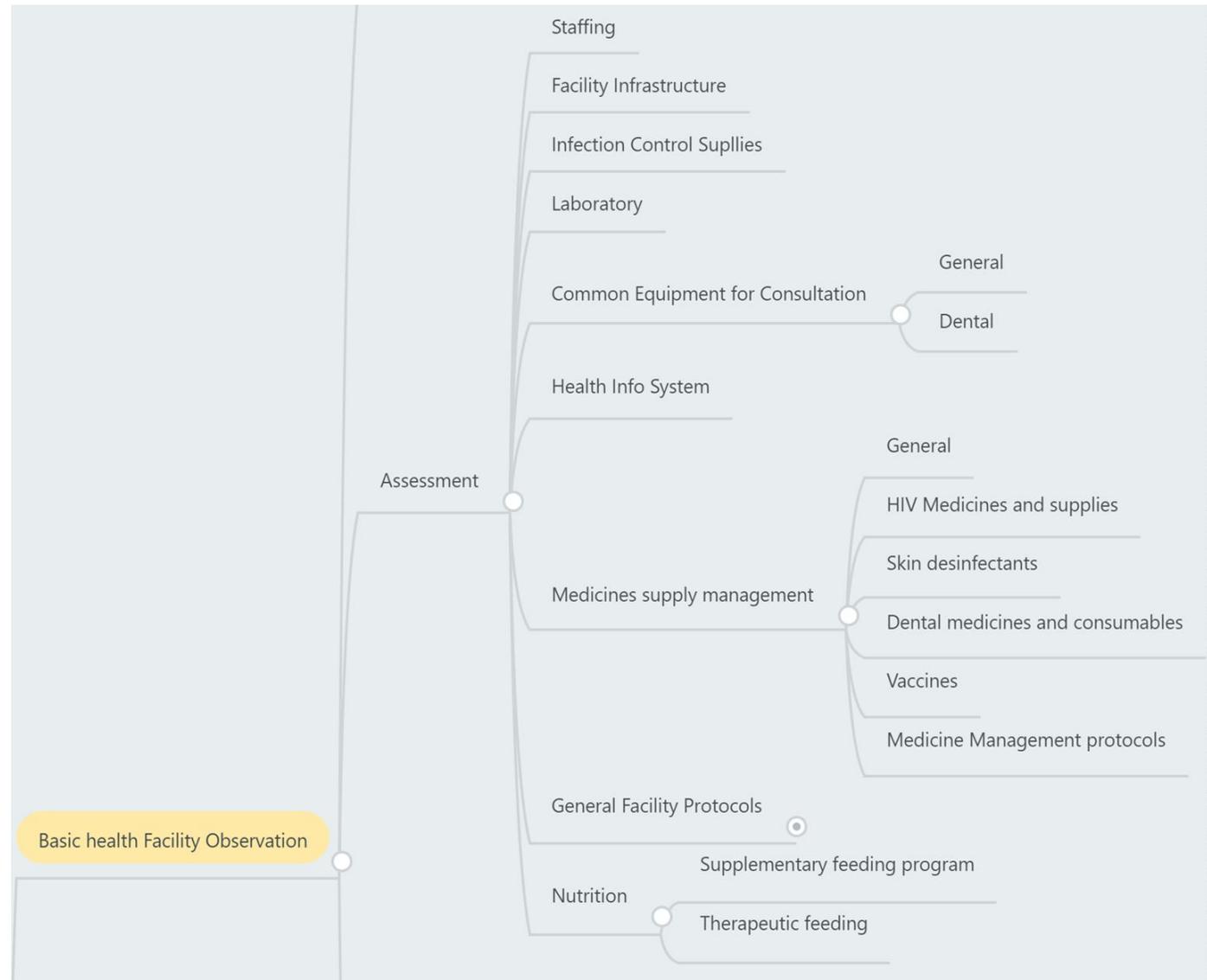
If Primary Health Service = "Laboratory" (Screenshot 1) and Do you want to assess the laboratory during this exercise = "Yes" (Screenshot 2) and What kind of laboratory assessment do you want to carry out = "Basic Assessment" (Screenshot 3)



ASSESSMENT FORMS: SCORES

Basic Health Facility Observation

RESULTS SUMMARY	
Results at Facility by Ggg at 2018-03-06 :	
Staffing :	100 %
Facility Infrastructure :	95 %
Infection control supplies :	100 %
Common equipment for consultations :	92 %
Equipment for dental consultation :	80 %
Vaccines :	80 %
HIS :	100 %
General Medicines :	68 %
Dental medicines :	100 %



ASSESSMENT FORMS: SCORES

Immunization

BSC_EPI_v2

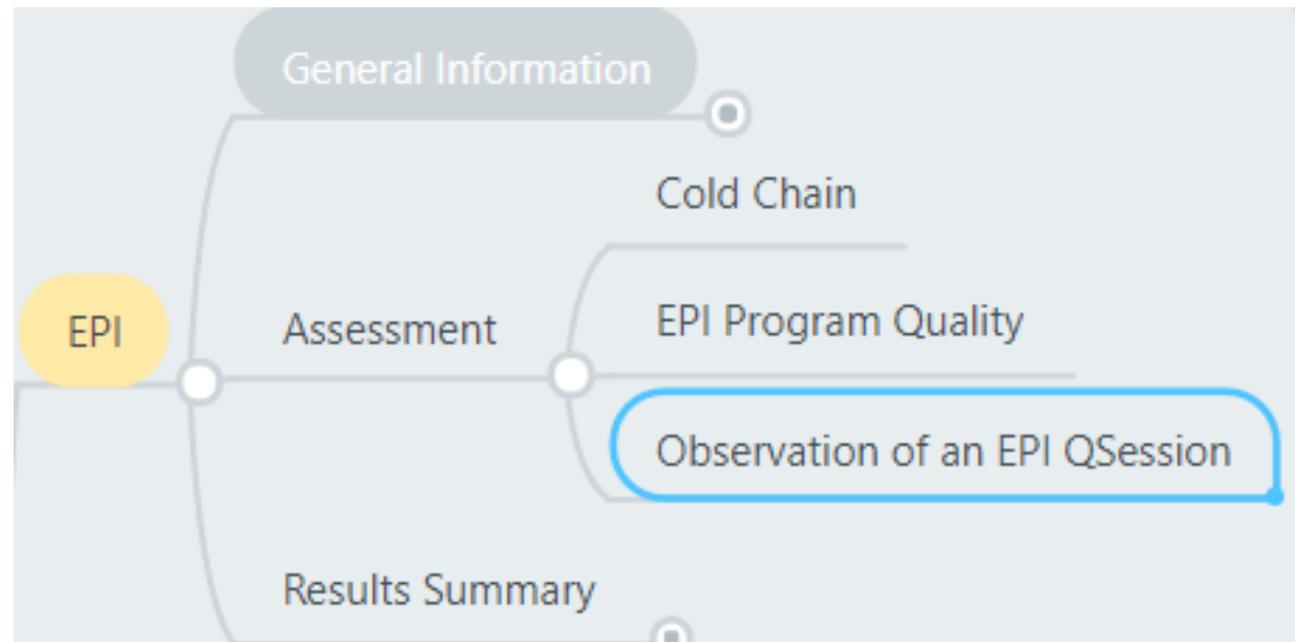
RESULTS SUMMARY

Results at Facility CS Kirumbu by Yy at 2018-02-27 :

Cold Chain : 5 %

Program quality : 0 %

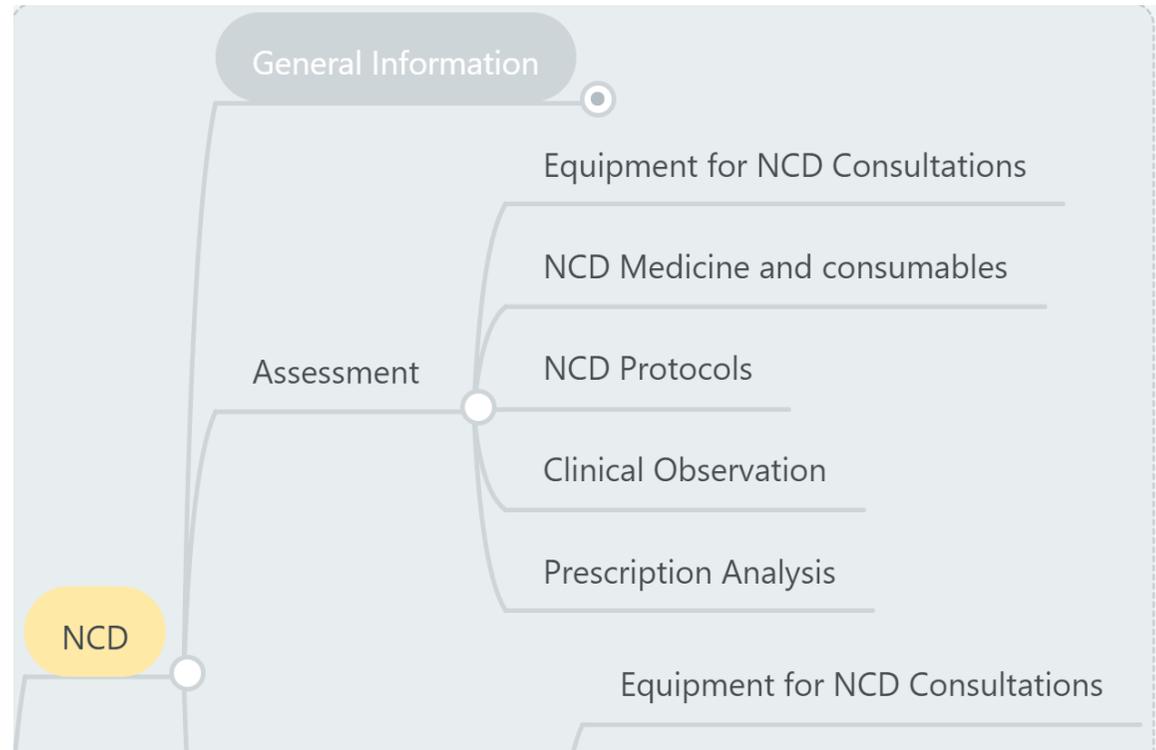
GLOBAL RATE : %



ASSESSMENT FORMS: SCORES

NCD Assessments

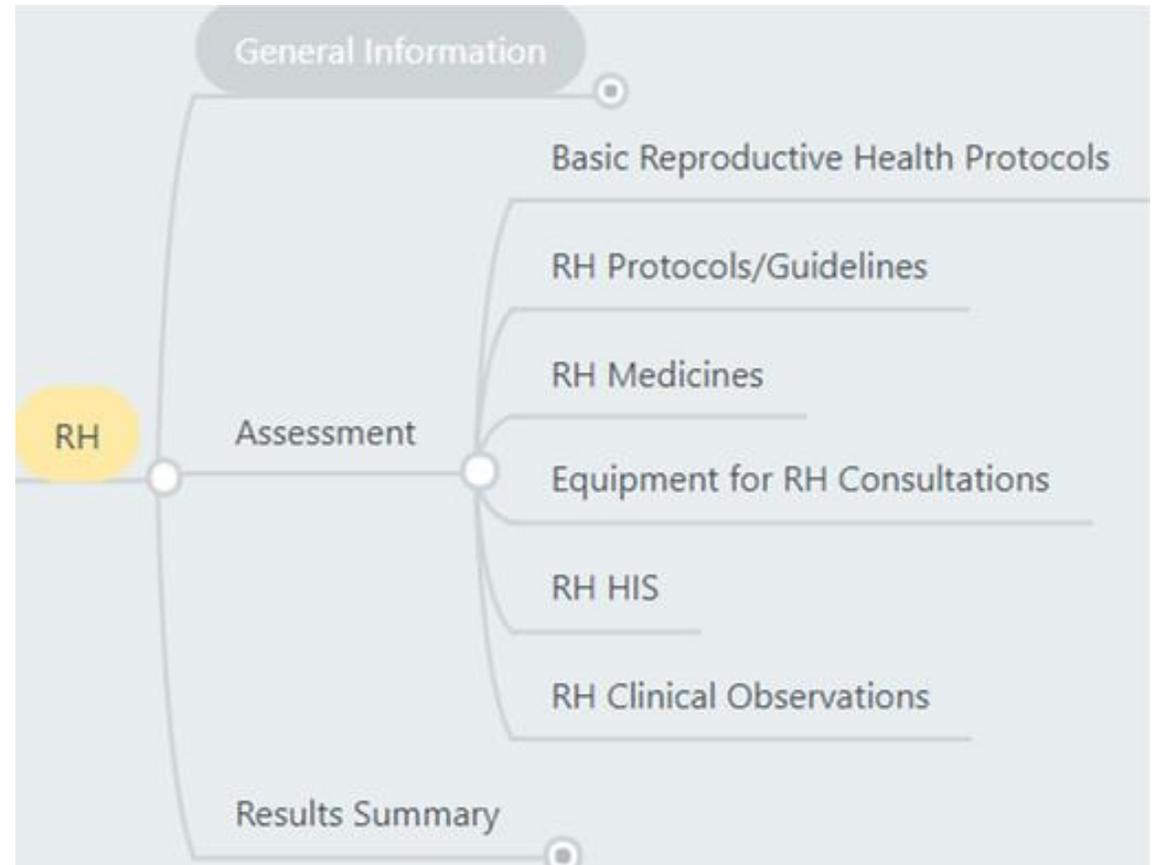
BSC_NCD_v2	
RESULTS	
Observation at at Facility by Uu at 2018-03-06 :	
EQUIPMENT FOR NCD CONSULTATIONS :	100 %
NCD MEDICINE AND CONSUMABLES :	100 %
NCD PROTOCOLS ::	82 %
CLINICAL OBSERVATION :	73 %
PRESCRIPTION ANALYSIS FOR NCD :	75 %
GLOBAL RATE : 86 %	



ASSESSMENT FORMS: SCORES

Reproductive Health Assessment

BSC_RH_v2	
BASIC RH PROTOCOLS	: 67 %
PROTOCOLS	: 88 %
<i>Detailed Reproductive Health/HIV Protocols</i>	<i>: 85 %</i>
<i>Referrals</i>	<i>: 100 %</i>
<i>Maternal nutrition</i>	<i>: 100 %</i>
RH MEDICINES	: 67 %
RH EQUIPMENT	: 100 %
RH HIS	: 100 %
ANC OBSERVATIONS	: 73 %
PNC OBSERVATIONS	: 71 %
GLOBAL RATE	: 81 %



ASSESSMENT FORMS: SCORES

Laboratory assessment

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 %



ASSESSMENT FORMS: SCORES

BSC_ClientInterview_v4 7:52

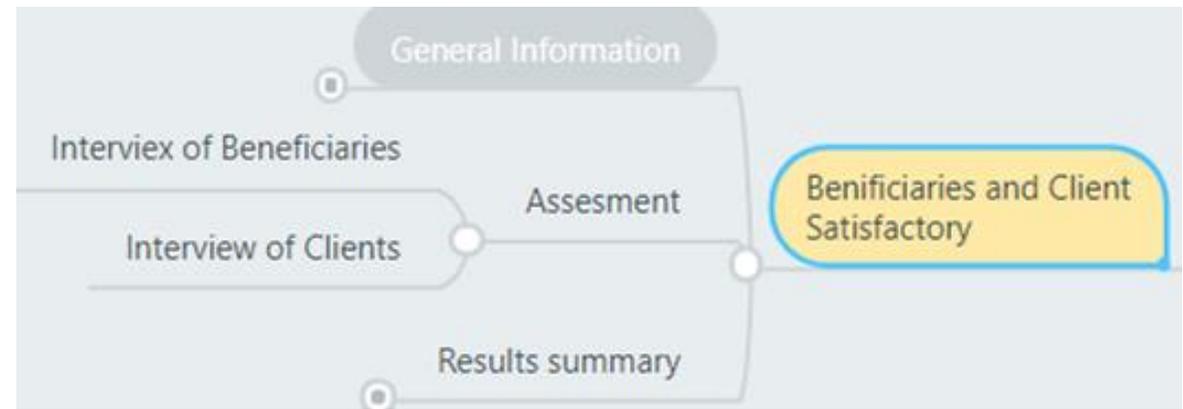
RESULTS SUMMARY

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

BENEFICIARIES SATISFACTION SCORE : 54 %

GENERAL CLIENTS SATISFACTION SCORE : 47 %

GLOBAL : 51 %



BSC_Child_v2 58% 11:52

Final Results

RESULTS SUMMARY

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

Clinical observation child : 75 %

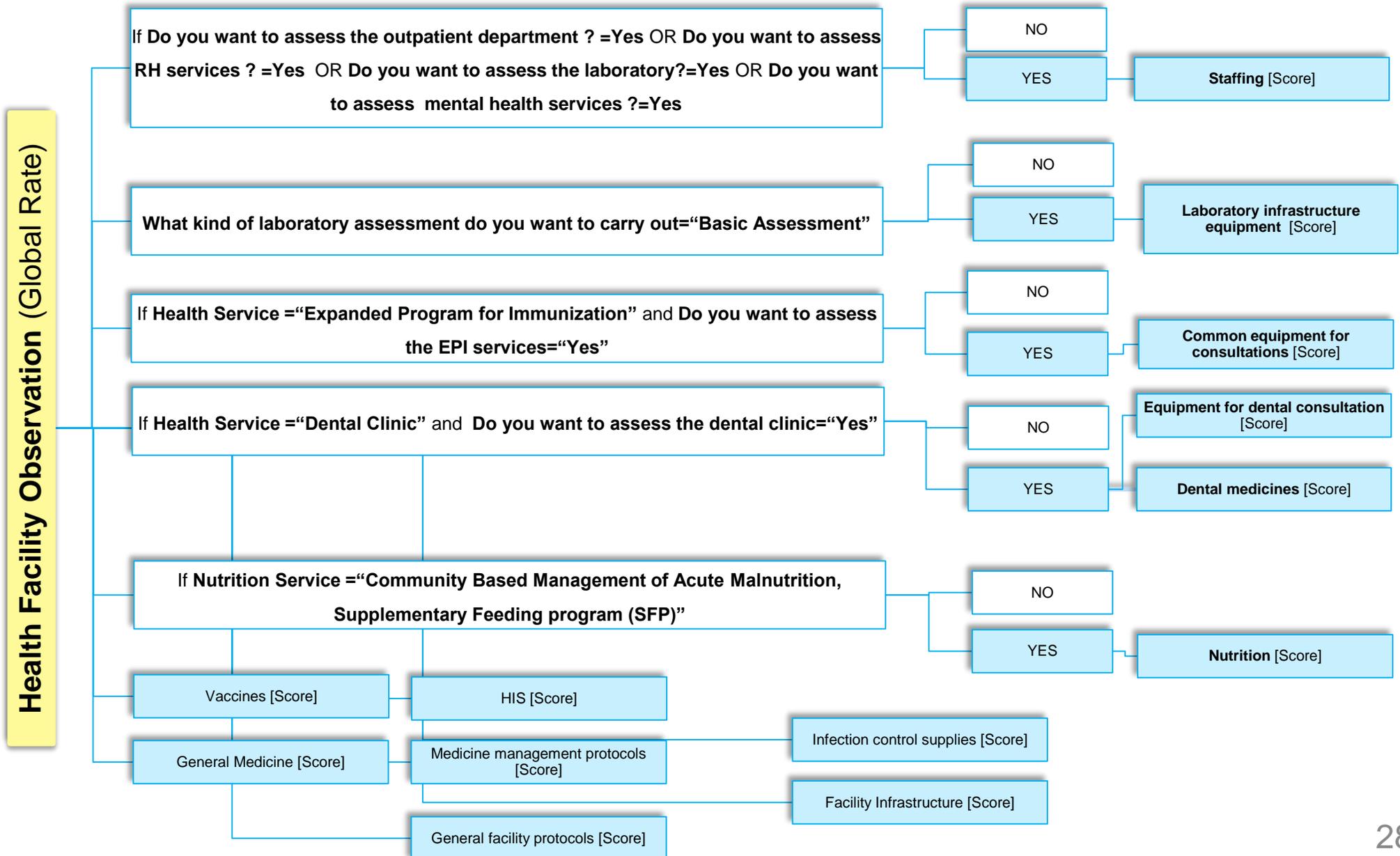
Prescription Analysis for Acute Health Conditions for Under 5 Children: 25 %

GLOBAL RATE : 50%



INDICATORS

Health Facility Observations



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.

INDICATORS

CHILD OBSERVATIONS

Clinical observation child

Prescription analysis for acute health conditions for under 5 children

Global rate

CLIENT INTERVIEWS

Beneficiaries satisfaction score

General clients satisfaction score

Global rate

PREPARING THE TABLET

OVERVIEW OF TOOLS

ODK/Kobo Collect + Kobo Toolbox

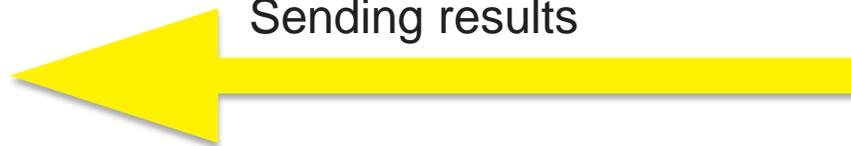
**Kobo
Toolbox**



Sending blank forms



Sending results



**ODK Collect
Kobo Collect**



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

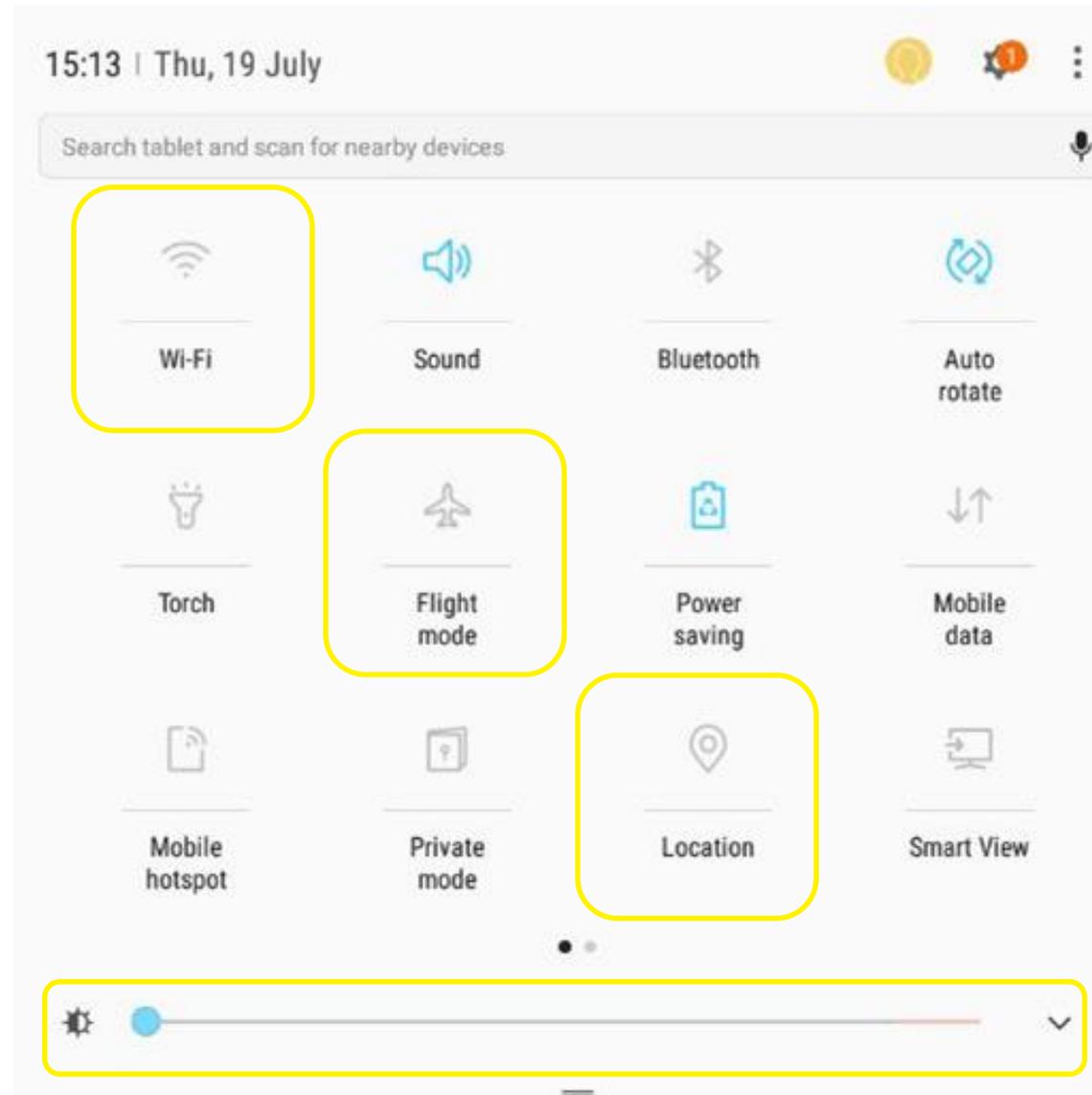
To save energy when not using it

- WIFI OFF
- Flight mode ON
- GPS OFF

To save energy when using it

- Lower luminosity of the display

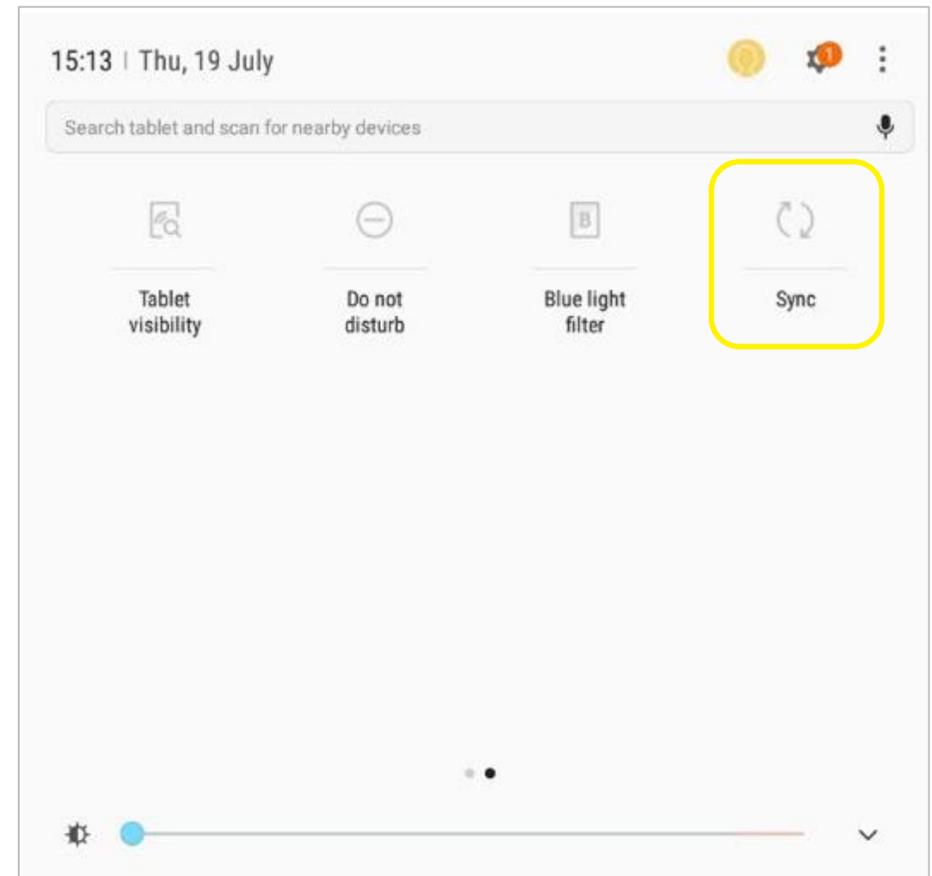
» You might need to adapt it depending on your environment, in dark rooms it is ok to have luminosity at its lowest, whilst being outside in full light you might need to increase luminosity.



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



APPLICATIONS

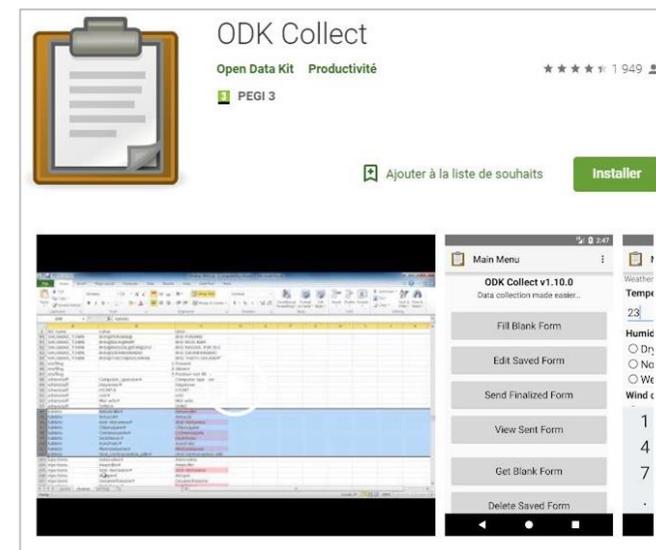
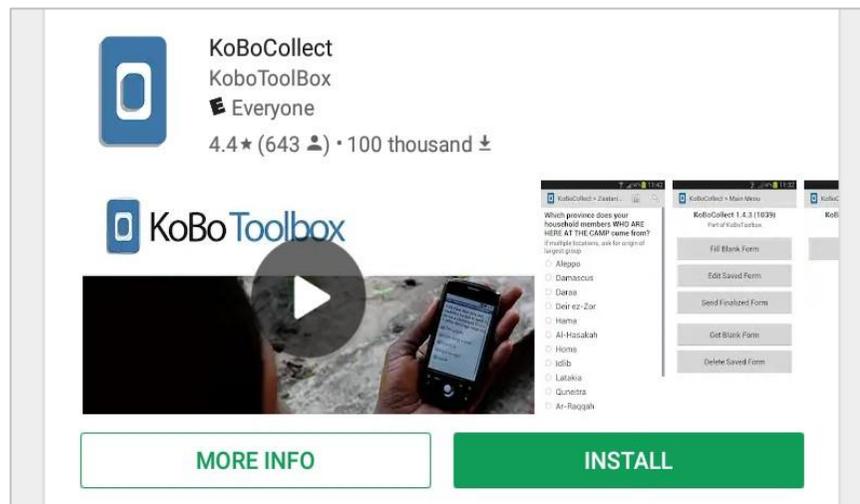
To be installed



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



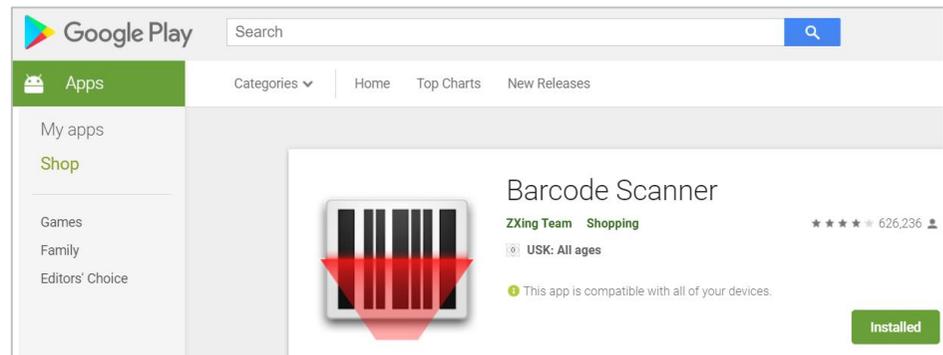
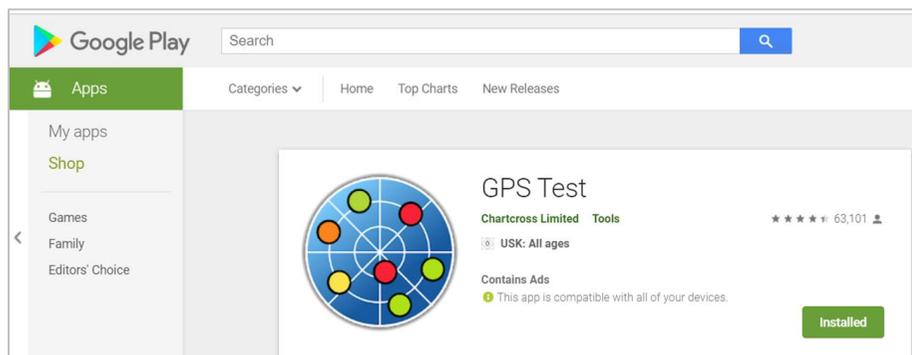
APPLICATIONS

To be installed

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.

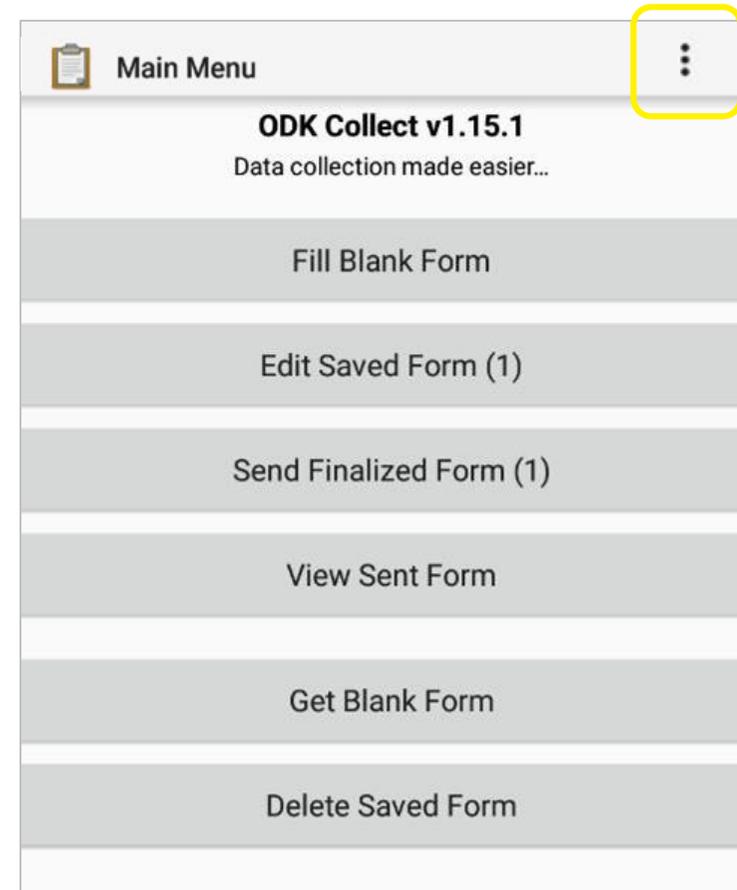
ODK SETTINGS

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

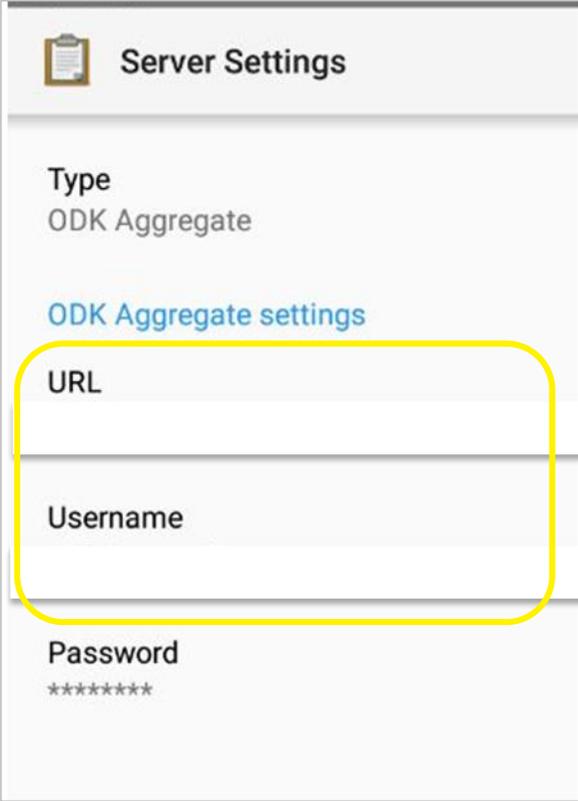
MANDATORY AND HIGHLY RECOMMENDED

In General Settings
> Server

Define your Kobo server access

<https://kobocat.unhcr.org>

➤ Username: bsc
Password: bsc_@unhcr1



Server Settings

Type
ODK Aggregate

ODK Aggregate settings

URL

Username

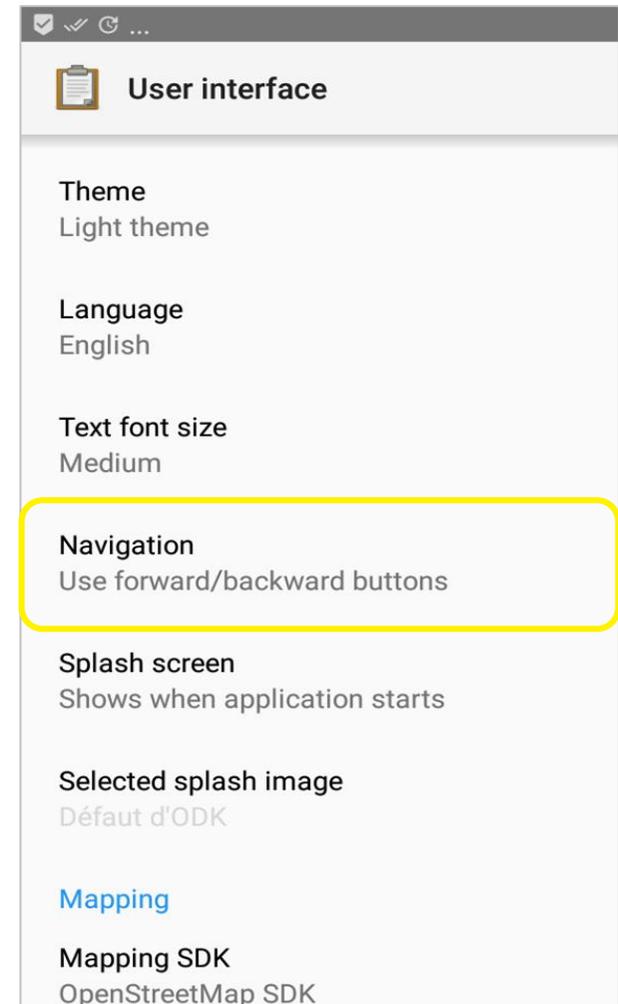
Password

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.



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

The screenshot shows the 'Form management' settings page. The settings are organized into sections: 'Form update', 'Form submission', 'Form filling', and 'Form import'. Three settings are highlighted with yellow boxes: 'Auto send' (set to 'Off'), 'Delete after send' (checkbox is unchecked), and 'Default to finalized' (checkbox is unchecked). Other settings include 'Periodic form updates check' (set to 'Never'), 'Automatic download' (checkbox is unchecked), 'Hide old form versions' (checkbox is checked), 'Constraint processing' (set to 'Validate upon forward swipe'), 'High res video' (checkbox is checked), 'Image size' (set to 'Original size from camera (default)'), 'Show guidance for questions' (set to 'Yes - always shown'), and 'Finalize forms on import' (checkbox is checked).

Section	Setting	Value
Form update	Periodic form updates check	Never
	Automatic download	<input type="checkbox"/>
	Hide old form versions	<input checked="" type="checkbox"/>
Form submission	Auto send	Off
	Delete after send	<input type="checkbox"/>
Form filling	Default to finalized	<input type="checkbox"/>
	Constraint processing	Validate upon forward swipe
Form import	High res video	<input checked="" type="checkbox"/>
	Image size	Original size from camera (default)
	Show guidance for questions	Yes - always shown
Form import	Finalize forms on import	<input checked="" type="checkbox"/>

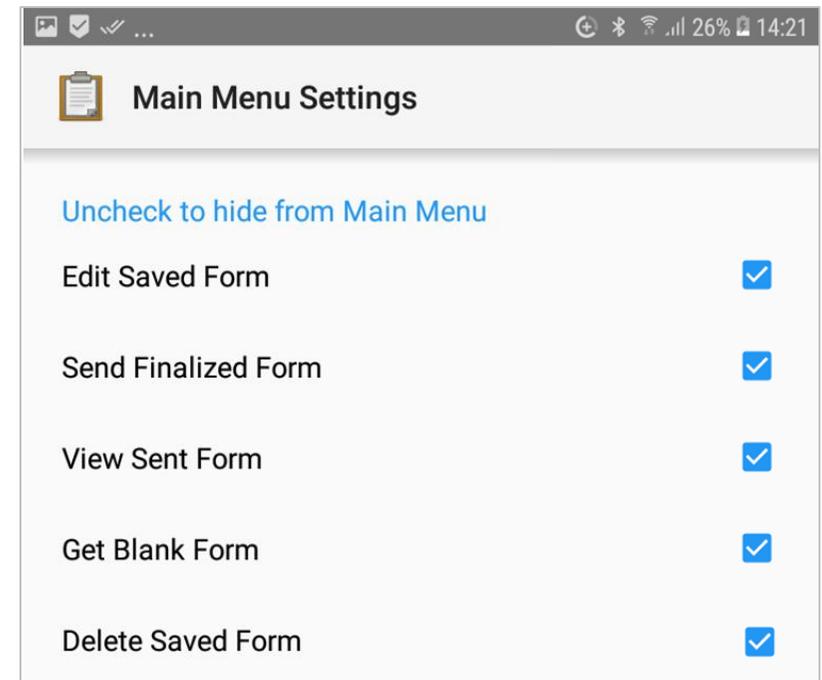
SETTINGS

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*)

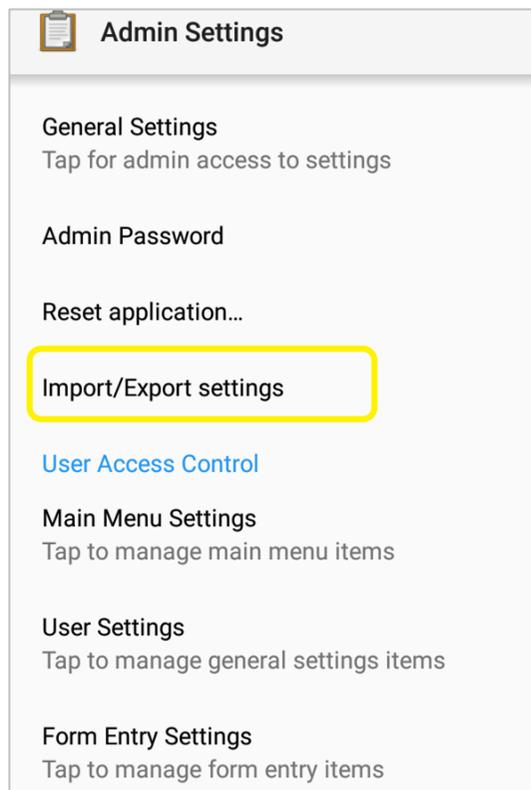
SETTINGS

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

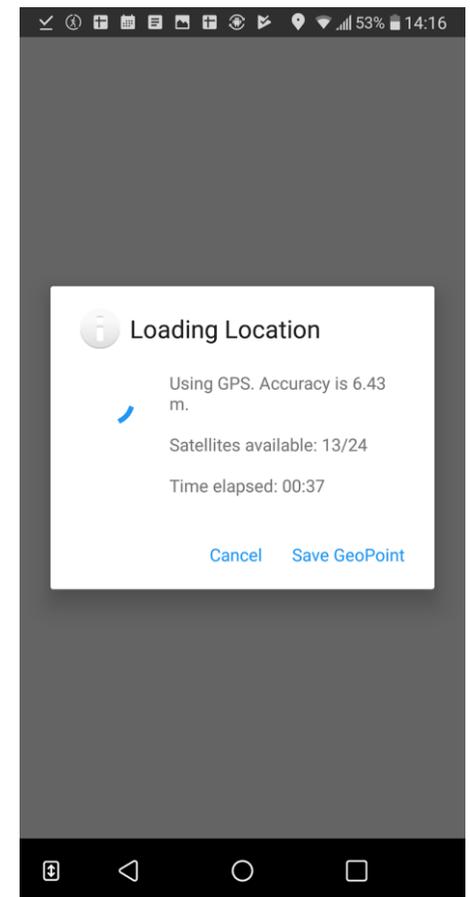
- **GPS** is working

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*).

➤ 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**

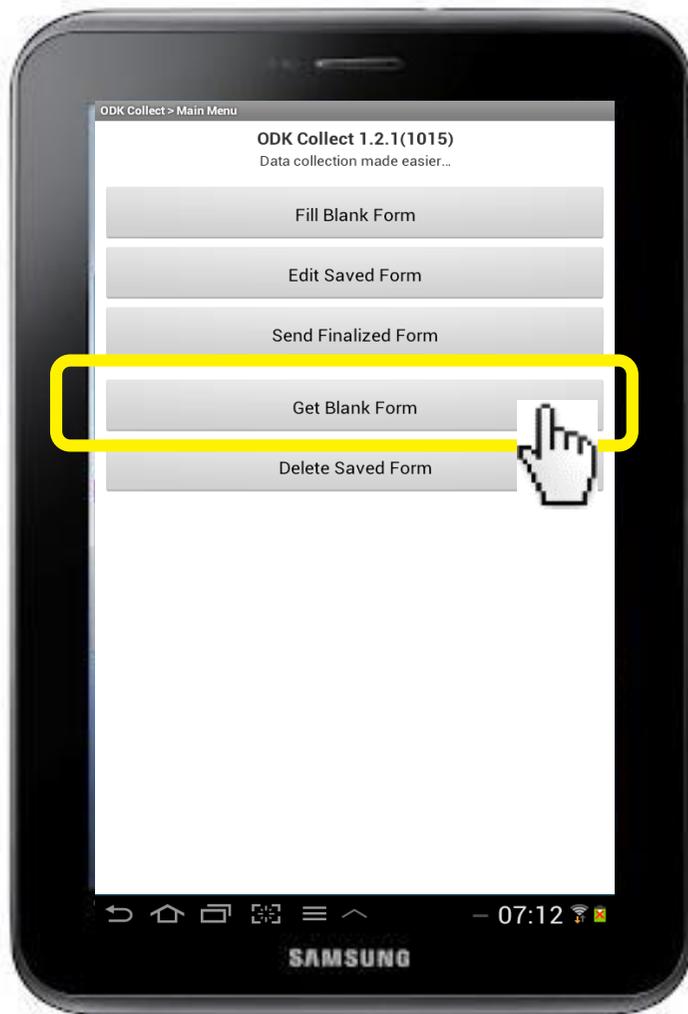
For instance this one which works well with ODK: [Zxing](#)



GET BLANK FORMS

Download the forms you need on your tablet

1.



2.



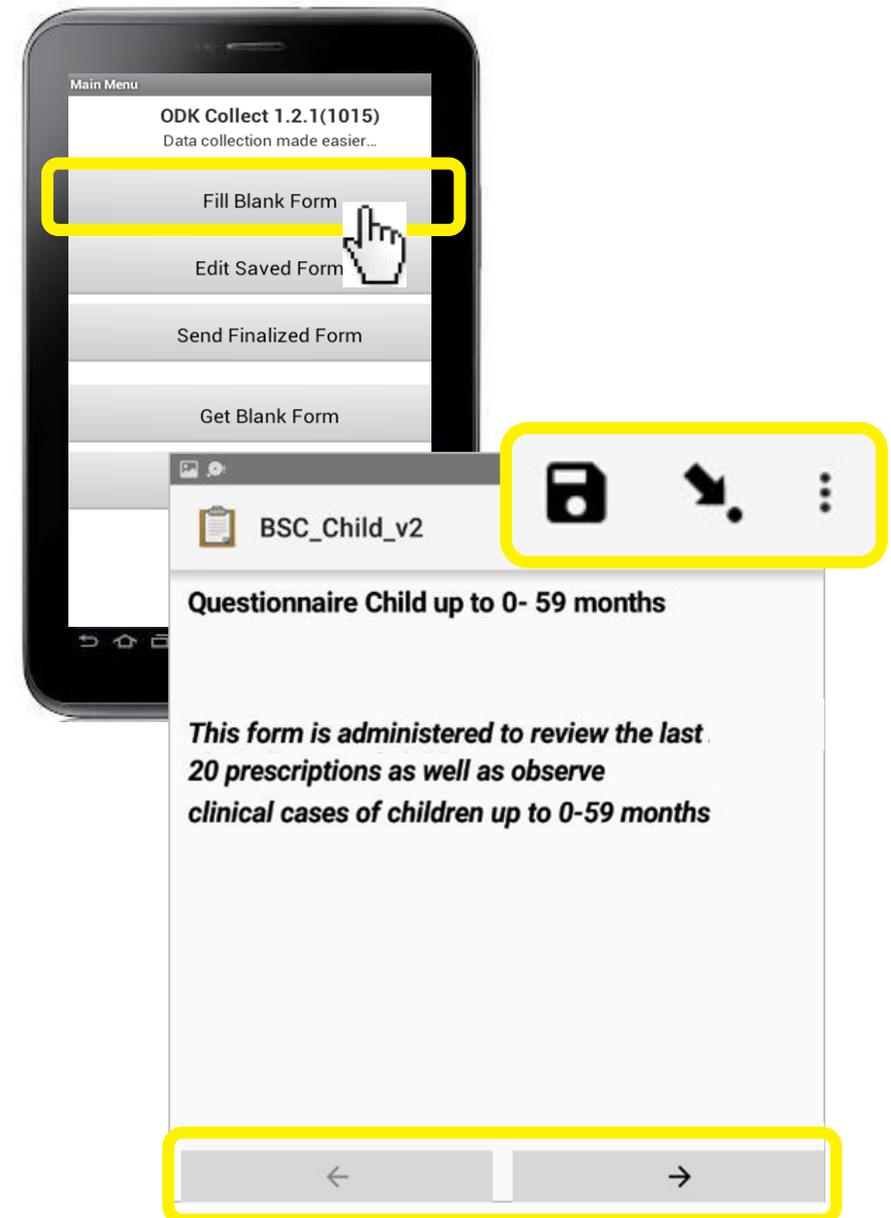
ODK FORM FILLING OPTIONS

Fill Blank form → start filling a survey

Few options always available at the top right hand corner :

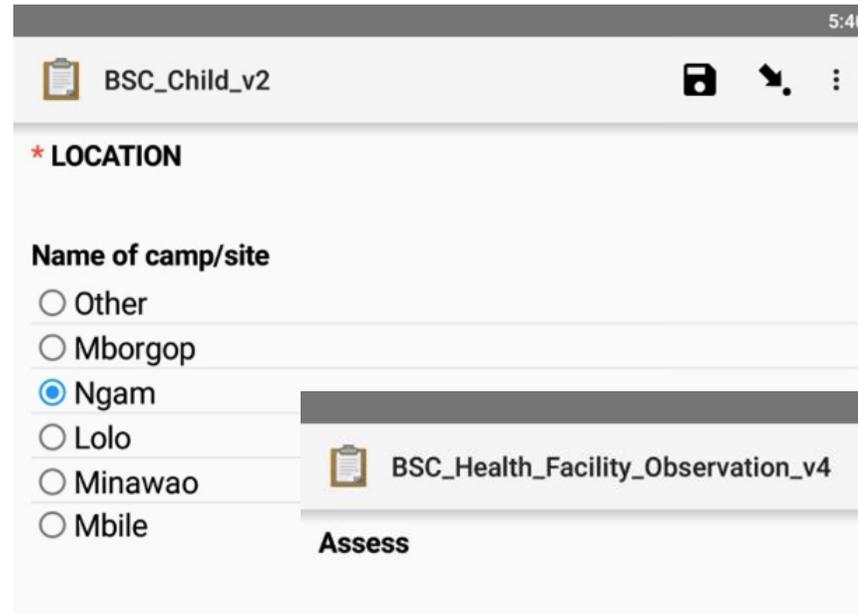
- Floppy disk for saving your answers and
- Arrow to go directly to a specific question
 - » Very useful when you want to reread a form or filling it where you stopped
- 3 dots for changing language

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.



5:40

BSC_Child_v2

*** LOCATION**

Name of camp/site

Other

Mborgop

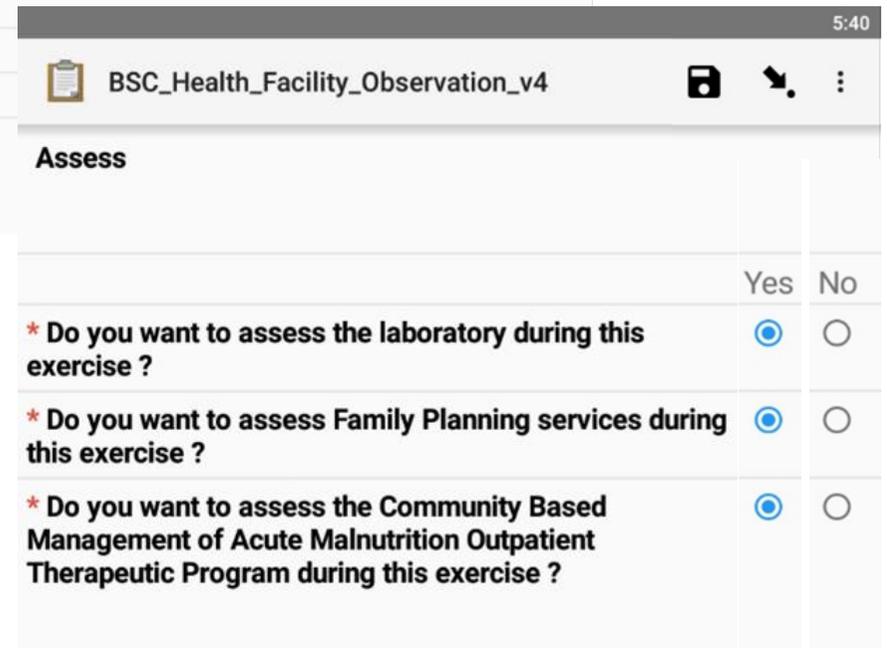
Ngam

Lolo

Minawao

Mbile

➤ When there is a circle (radio button), only one can be checked



5:40

BSC_Health_Facility_Observation_v4

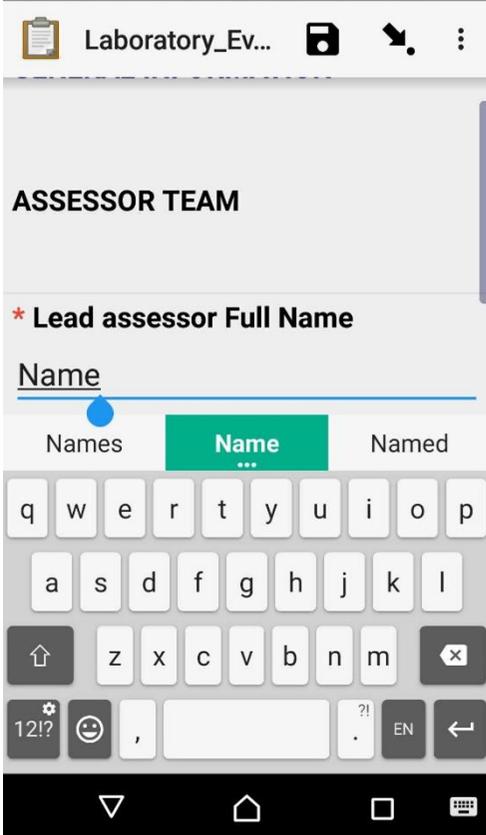
Assess

	Yes	No
* Do you want to assess the laboratory during this exercise ?	<input checked="" type="radio"/>	<input type="radio"/>
* Do you want to assess Family Planning services during this exercise ?	<input checked="" type="radio"/>	<input type="radio"/>
* Do you want to assess the Community Based Management of Acute Malnutrition Outpatient Therapeutic Program during this exercise ?	<input checked="" type="radio"/>	<input type="radio"/>

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



Laboratory_Ev...

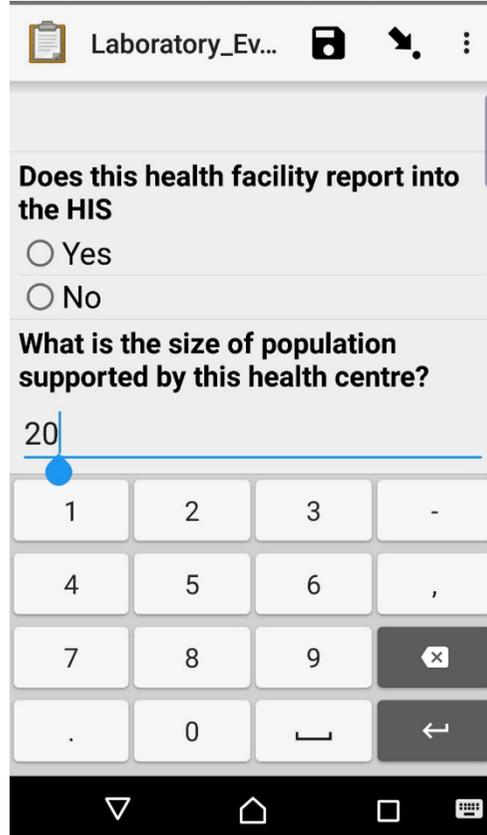
ASSESSOR TEAM

* Lead assessor Full Name

Name

Names Name Named

q w e r t y u i o p
a s d f g h j k l
↑ z x c v b n m ✕
12! ? , . ?! EN ←



Laboratory_Ev...

Does this health facility report into the HIS

Yes
 No

What is the size of population supported by this health centre?

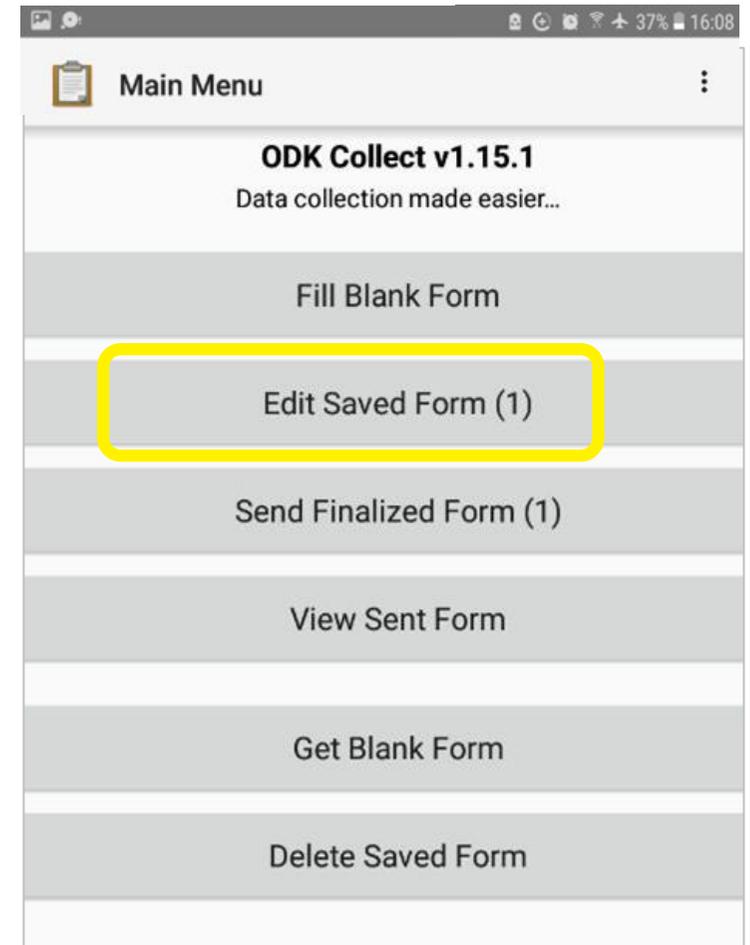
20

1 2 3 -
4 5 6 ,
7 8 9 ✕
. 0 ← ←

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

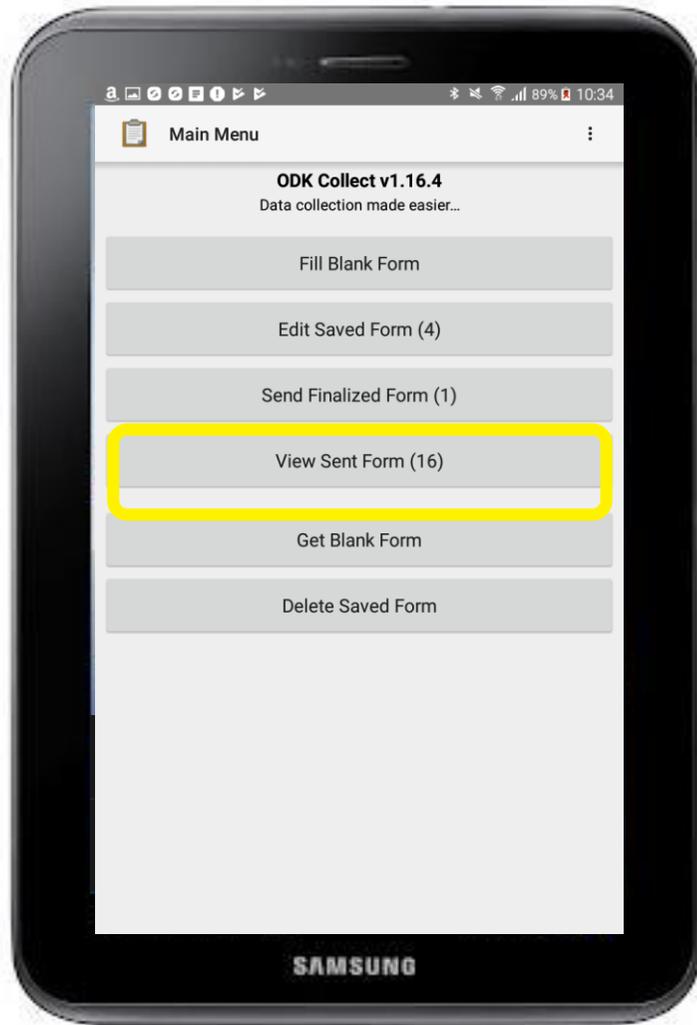
Remember that to be able to send a form you must have marked it as finalized (last screen of form filling)



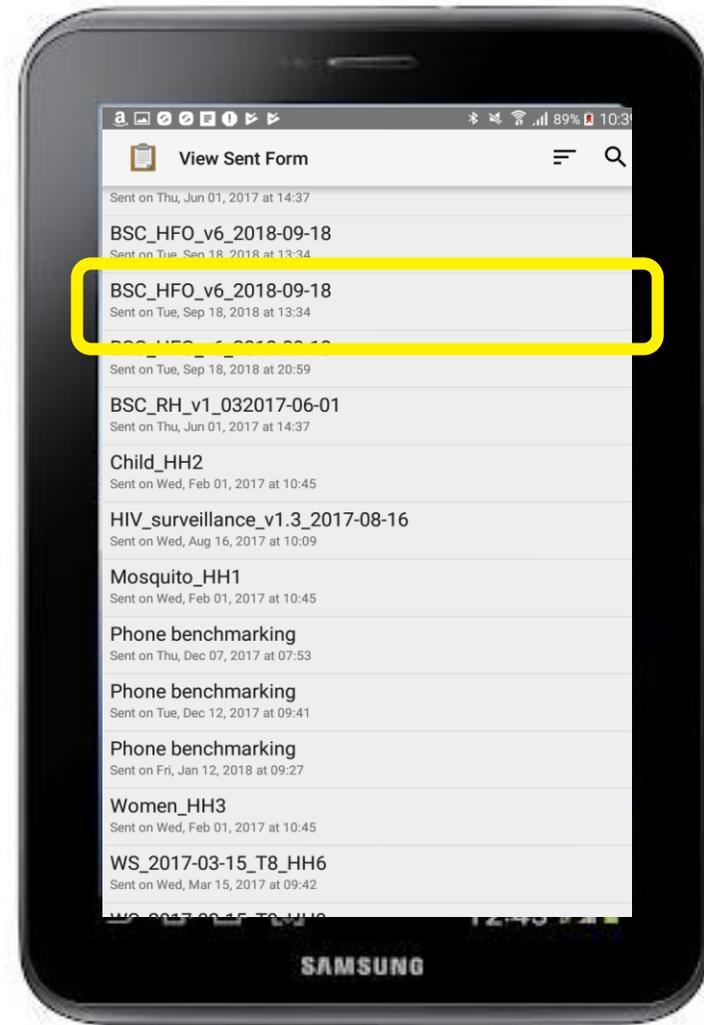
ODK MAIN MENU

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

1.

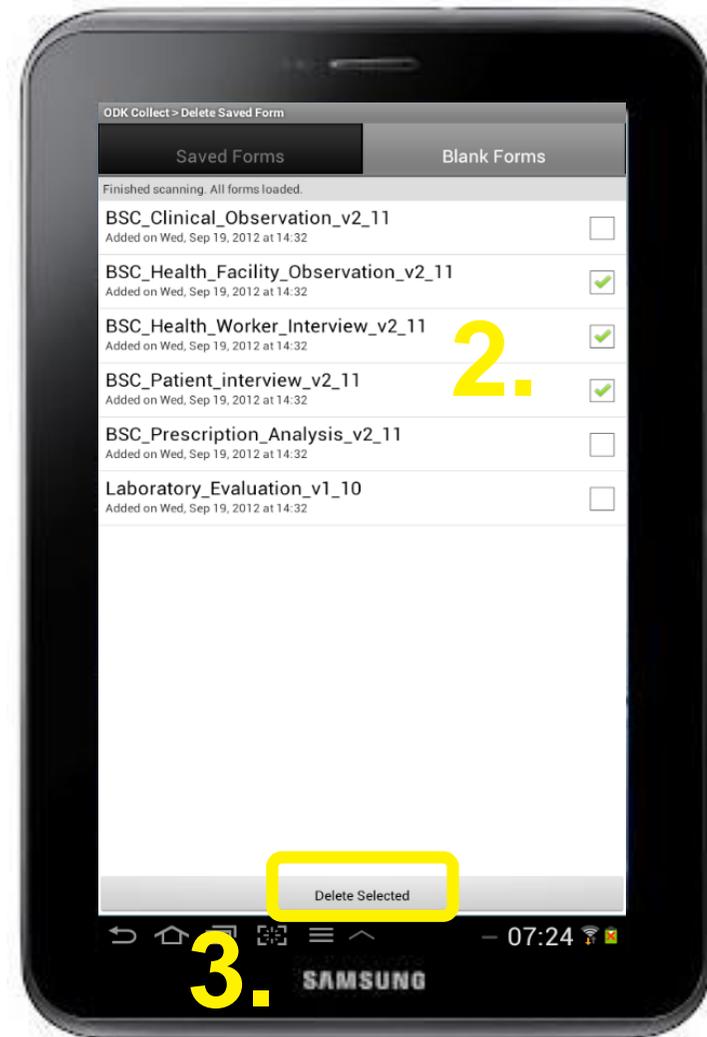


2.



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.**

	Observed available	Any expired	Out of stock
Polyvidone/Povidone Iodine 10%, 200 ml bottle	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Methylated Spirit/Alcohol	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If Out Of Stock selected, multiselection not possible

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.

NEXT: BSC DASHBOARD