BALANCED SCORE CARD
Overview on Scores, Setup and Use
INTRODUCTION
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?
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

EPI (Immunization) Assessment

NCD Assessments

RH (Reproductive health) Assessment

Laboratory Assessment

Comprehensive survey

Child Observations

Clients Interviews

Additional
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.
HEALTH FACILITY ID, LINKING QUESTIONNAIRES
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

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**NO**

Please enter the missing Health Facility here: [https://docs.google.com/spreadsheets/d/1sipL4GxwqZ0sFRGkpqFtE84nDIVRAk68ASFcgF6o6I/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1sipL4GxwqZ0sFRGkpqFtE84nDIVRAk68ASFcgF6o6I/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

**YES**

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)*
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 **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.**
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
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.

<table>
<thead>
<tr>
<th>Each Medicine</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>If not available or all expired</td>
<td>0</td>
</tr>
<tr>
<td>Some are available and some are expired</td>
<td>1</td>
</tr>
<tr>
<td>If Available</td>
<td>2</td>
</tr>
</tbody>
</table>
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.

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

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

* PRESCRIPTION ANALYSIS FOR ACUTE HEALTH CONDITION FOR UNDER 5 CHILDREN

Please enter the number of cases being observed. Ideally observe 20 documented clinical cases.
## SCORES & INDICATORS

### LOOPS

<table>
<thead>
<tr>
<th>FORM</th>
<th>LOOP</th>
<th>REQUIRED ENTRIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child up to 0- 59 months</td>
<td>Clinical observation Child up 0- 59 months</td>
<td>&gt;= 3</td>
</tr>
<tr>
<td></td>
<td>Prescription analysis for acute health condition for under 5</td>
<td>&gt;= 20</td>
</tr>
<tr>
<td>Comprehensive EPI Assessment</td>
<td>Observation of an EPI session</td>
<td>&gt;= 5</td>
</tr>
<tr>
<td>Comprehensive RH Assessment</td>
<td>Reproductive health clinical observation</td>
<td>&gt;= 3</td>
</tr>
<tr>
<td>Comprehensive NCD Assessment</td>
<td>Clinical observation</td>
<td>&gt;= 3</td>
</tr>
<tr>
<td></td>
<td>Prescription analysis for NCD</td>
<td>&gt;= 20</td>
</tr>
<tr>
<td>Client Satisfactory</td>
<td>Interview with caregivers of vaccinated infants</td>
<td>&gt;= 5</td>
</tr>
<tr>
<td></td>
<td>Client interview (&gt; 5)</td>
<td>&gt;= 5</td>
</tr>
</tbody>
</table>
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.
**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)

- YES
  - Score
- NO
  - No score Applied
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

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

RESULTS

Observation 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

ASSESSMENT FORMS: SCORES

BASIC RH PROTOCOLS: 67%

PROTOCOLS: 88%

Detailed Reproductive Health/HIV Protocols: 85%

Referrals: 100%

Maternal nutrition: 100%

RH MEDICINES: 67%

RH EQUIPMENT: 100%

RH HIS: 100%

ANC OBSERVATIONS: 73%

PNC OBSERVATIONS: 71%

GLOBAL RATE: 81%
Laboratory assessment

ASSESSMENT FORMS: SCORES

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

RESULTS SUMMARY

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

BENEFICIARIES SATISFACTION SCORE: 54%

GENERAL CLIENTS SATISFACTION SCORE: 47%

GLOBAL: 51%

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

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

What kind of laboratory assessment do you want to carry out? = “Basic Assessment”

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

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

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

Vaccines [Score]
HiS [Score]
General Medicine [Score]
Medicine management protocols [Score]
General facility protocols [Score]

Infection control supplies [Score]
Facility Infrastructure [Score]

Laboratory infrastructure equipment [Score]
Common equipment for consultations [Score]
Equipment for dental consultation [Score]
Dental medicines [Score]

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

**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.
<table>
<thead>
<tr>
<th>CHILD OBSERVATIONS</th>
<th>CLIENT INTERVIEWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical observation child</td>
<td>Beneficiaries satisfaction score</td>
</tr>
<tr>
<td>Prescription analysis for acute health conditions for under 5 children</td>
<td>General clients satisfaction score</td>
</tr>
<tr>
<td>Global rate</td>
<td>Global rate</td>
</tr>
</tbody>
</table>
PREPARING THE TABLET
OVERVIEW OF TOOLS
ODK/Kobo Collect + Kobo Toolbox

Sending blank forms

Sending results
OpenDataKit (ODK)

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
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
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 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.
In General Settings
   > Server

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

Username: bsc
Password: bsc_@unhcr1
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.
**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
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)
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
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. Get Blank Form
2. Select forms and download
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
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.
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:
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. View Sent Form (16)

2. Selected View Sent Form screen showing sent forms.
ODK MAIN MENU

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

1. Delete Saved Form
2. Select forms to delete
3. Confirm deletion
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.
Access to the Dashboard