

# HHA Compliance Database Instructions for all users

Last updated: October 2019



## **Table of Contents**

Welcome	6
Login	6
Login screen – Compliance Database	6
Login screen – Compliance Mobile	6
Username	7
Password	7
Navigation	9
Home screen	9
Update My Profile	10
Edit Details:	10
Review / Remove Roles	11
Update Other User's Profiles	12
How to Create New Audits – National and Local	13
Screen Overview	13
Accessing the Audits Page	14
Adding a new National Audit Period	16
Adding a Local Audit	16
Changing the Dates of a Local Audit Period	19
Temporary Audits	20
Managing Departments for an Organisation	22
Screen Overview	22
Viewing an Organisation's Departments	23
Editing an existing department	24
Inactivating or deleting an existing department	24
Adding a New Department	25
Parent Departments	25
Managing Healthcare Worker Types (HCW) for an Organisation	27
Screen Overview	27
Viewing an Organisation's HCW Types	28
Editing an existing HCW type	29
Inactivating or deleting an existing HCW Type	30
Adding a New HCW Type	30



Adding a User as an Auditor for an Organisation	32
Screen Overview	32
Viewing an Organisations' users	33
Adding an existing User to the role of Auditor at an Organisation	34
Detaching an Auditor	35
Creating a New User	36
Adding or detaching an auditor directly from the users profile page	38
Add Session data for an Organisation – non-Auditor	40
Screen Overview	40
Accessing the Sessions page	41
Adding a new Session	42
Editing a session's moments	45
Editing a session's details page	45
Add Session data for an Organisation as an Auditor	47
Screen Overview	47
Accessing the Sessions page	47
Adding a new Session	48
Editing a session's moments	50
Editing a session's details page	51
Submit an Audit	52
Screen Overview	52
Accessing the Audits Page	52
Submitting the Audit	53
Generating Compliance Database Reports – New Zealand Users	56
Screen Overview	57
View Reports	58
Standard Reports	59
Compliance Reports	59
Poster Reports	61
Auditor and Sessions Report	62
Export CSV Line Data	62
Custom Reports	63
Snapshot Reports	63



Trend Reports	66
Generating Compliance Database Reports – non-NZ users	69
Screen Overview	69
View Reports	70
Standard Reports	70
Compliance Reports	71
Poster Reports	72
Auditor and Sessions Report	73
Export CSV Line Data	74
Mobile data entry	76
Data Entry via a Mobile Device	76
Accessing and Logging into Compliance Mobile	76
Entering Session Information	77
Entering Moment Data	79
Deleting an Active Moment	79
Saving Moments	79
Invalid Entry	80
Ending a Session	81
Syncing a Session with the Compliance Database	82
Logging Out	83
Data Usage	83
Troubleshooting - Mobile Devices - Android	84
What are the benefits of using Compliance Mobile?	84
What is the difference between the Compliance Database and Compliance Mobile?	85
How can I quickly access Compliance Mobile?	86
How much of my data plan will I use if I collect moments on my personal device?	88
What if I can login to the Compliance Database on the computer but not Compliance Mobile? .	88
How do I reset my password if I have forgotten it?	88
What if the 'Forgot Password' function doesn't work?	90
How do I update my details or change my password?	91
Can I only enter four moments per session?	93
Why can't I Sync my data?	94
How do I manually enter data that can't be synchronised into the Compliance Database?	92



Tr	oubleshooting - Mobile Devices - Apple	99
	What are the benefits of using Compliance Mobile?	99
	What is the difference between the Compliance Database and Compliance Mobile?	.100
	How can I quickly access Compliance Mobile?	. 101
	How much of my data plan will I use if I collect moments on my personal device?	. 102
	What if I can login to the Compliance Database on the computer but not Compliance Mobile?	. 102
	How do I reset my password if I have forgotten it?	. 103
	What if the 'Forgot Password' function doesn't work?	. 104
	How do I update my details or change my password?	. 105
	Can I only enter four moments per session?	. 107
	Why can't I sync my data?	. 108
	How do I manually enter data that can't be synchronised into the Compliance Database?	.111
$\cap$	uick Start Compliance Database Guide	112



## **Welcome**

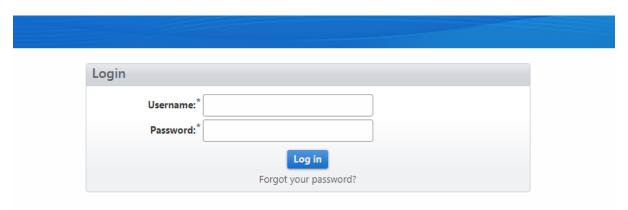
Welcome to the Hand Hygiene Australia Compliance Database!

This document outlines the essential information for use of the system for the various roles available.

## **Login**

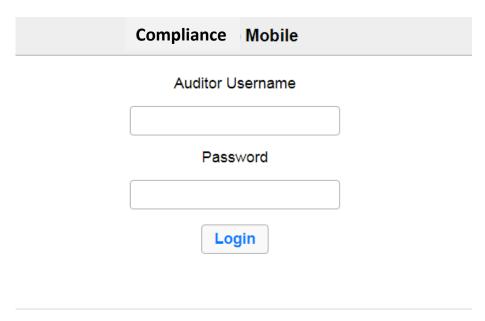
## **Login screen – Compliance Database**

URL: https://compliance.hha.org.au



## **Login screen – Compliance Mobile**

URL: <a href="https://compliance.hha.org.au/mobile">https://compliance.hha.org.au/mobile</a>



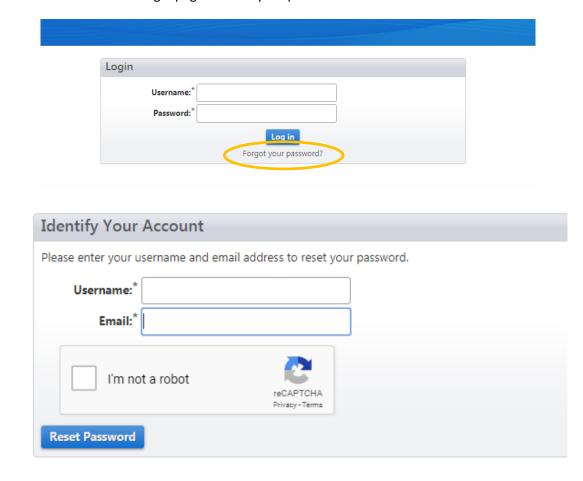


#### **Username**

Supplied by the person who created your profile

#### **Password**

The password was created on the registration of your profile. If you cannot remember what this is please use the link on the login page to reset your password:



#### **PLEASE NOTE:**

The forgotten password link will only work if you include the correct Username and the correct email address for your profile.

If you are **not** receiving an email to reset your password it is likely that you are entering your Username incorrectly OR the email address you provided is now out of date OR incorrect.

The forgotten password email should arrive in your inbox within ½ hour after using the forgotten password function. If you do not receive it after this time please do the following:



- 1. Check your junk and spam folders for the forgotten password email if found, mark the email as "NOT JUNK", then follow the prompts to login or change your password.
- 2. Try using the forgotten password again, ensuring that you are using the correct Username.

  Please note: the username is case sensitive
- 3. Try using the forgotten password again, but this time with an alternate email that may have been entered into your profile on registration. For example, you may have entered your work email for the 'forgotten password' however when registered, a personal email address was entered into your profile or vice versa.
- 4. If you have tried all of the above steps that are relevant to you, it is likely that you may have missed entering an email into your profile, or you entered your email address incorrectly. In this case you need to contact the person who created your profile



## **Navigation**

#### Home screen

Once you have logged in to the system, you will be presented with your homescreen. This will differ depending on the role you have been allocated in the system.

The following screenshots show the available administrative options (top level menu) for each user role:

For users with the role "Auditor"



For users with the role "Reporter"



For users with the role "Administrator"



For users with the role "Data Entry"





## **Update My Profile**

If you need to update any information saved in your learner profile, then click on **your name** in the top right hand corner of the screen:



#### **Edit Details:**

Then you are able to edit any of your user details:



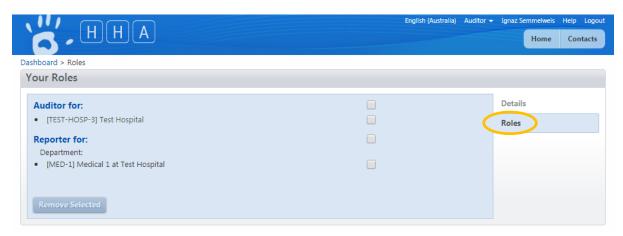
All details are able to be updated and saved.

Please ensure you read the note regarding the Password change. If a password is changed whilst you are still logged in on a mobile device, then you will not be able to sync data moving forward until the Mobile Device Troubleshooting guide is followed.



## **Review / Remove Roles**

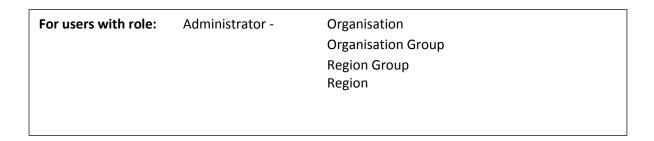
Review your Roles by clicking on the Roles tab in the vertical menu:



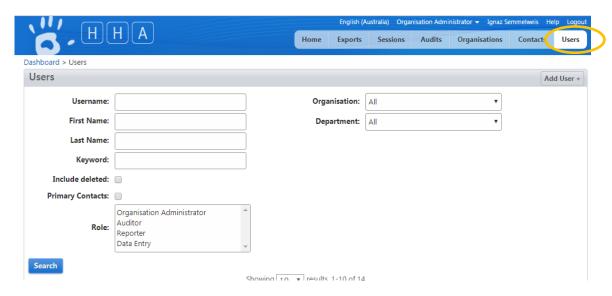
If you no longer need any of the attached roles, check the checkbox and press "Remove Selected"



## **Update Other User's Profiles**



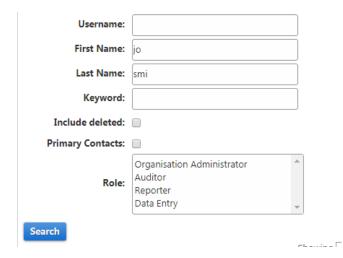
Select Users in the Top Level Menu:



Enter details in the Search options, then press Search.

**NOTE**: It is recommended that you enter a small amount of information in the search fields initially so that users are not missed.

For example, if searching for Joanne Smith:





#### How to Create New Audits - National and Local

For users with role: Administrator - Organisation
Organisation Group
Region Group
Region

#### **Contents:**

**Screen Overview** 

**Accessing the Audits Page** 

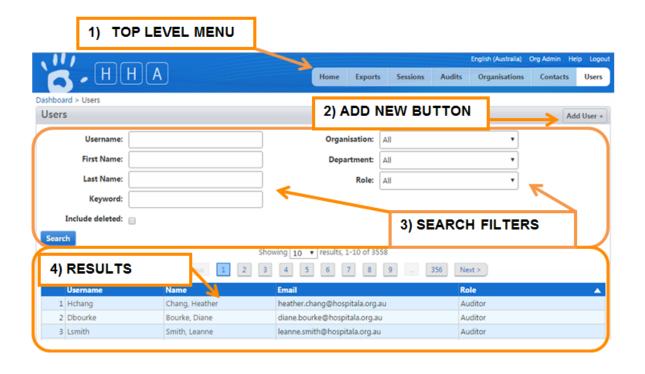
Adding a new National Audit Period

**Adding a Local Audit** 

Changing the Dates of a Local Audit Period

**Temporary Audits** 

#### **Screen Overview**





#### **Audits and Audit Periods**

An <u>Audit Period</u> is simply a defined date range that can contain one or more <u>Audits</u>. The moments collected are attached to an <u>Audit</u>. Reports, however are only available or the <u>Audit Period</u>.

National Audit Periods are defined and generated by an administrator if required. They only contain one audit with the same name.

Organisations can also define their own Local Audit Periods which they can create audits for. Moments collected against a local audit <u>are not</u> included in the national audits.



## **Accessing the Audits Page**

>Login to Compliance Database

There are 2 ways to access the Audits Page

To view and access all audits for the organisation(s) that you are an administrator for.

>Click the Audits button in the top level menu



OR

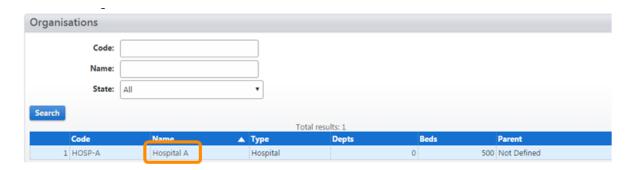
To view and access audits for a single organisation only

>Click the Organisations button in the top level menu



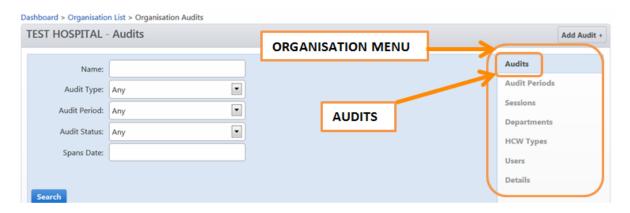
>Click an organisation's name to select it.





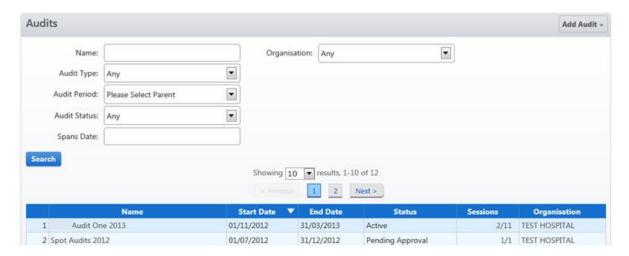
This will take you to the Organisation Administration screen

>Click Audits from the Organisation Menu if not already selected.



Both methods will take you to the Audits page where you will see a list of Audits for the selected organisation(s).

Nb. You can use the search filters to narrow down the list of audits if you are searching for an audit that has already been created for an organisation.





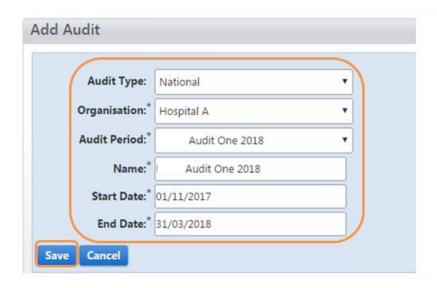
## **Adding a new National Audit Period**

>Click Add Audit +



>Select the Audit Type, Organisation and Audit Period

The Name, Start Date and End Date fields will be automatically completed.



\*Warning\* - Whilst it is possible to make the audit name different to the National Audit Period name, this may cause confusion for your auditors looking for the standard national audit period name

>Click Save

You will be returned to the Audits page where you will see that the new audit has been added to the results display.

The Audit is now available to have sessions added to it.

## **Adding a Local Audit**

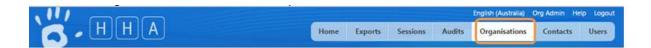
This is a 2 step process. The Audit Period must be defined before adding the audit.

Organisations can create Local Audit Periods for audits that an organisation does not want included as part of a national program.

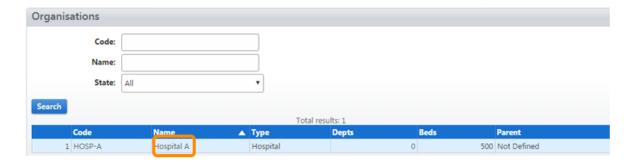
Step 1. Defining a Local Audit Period

>Click the Organisations button in the top level menu

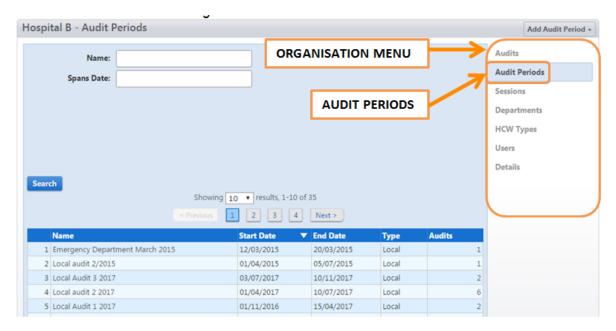




>Click an organisation's name to select it.



>Click Audit Periods in the Organisation Menu.



#### >Click Add Audit Period +





>Enter a Name, Start Date and End Date

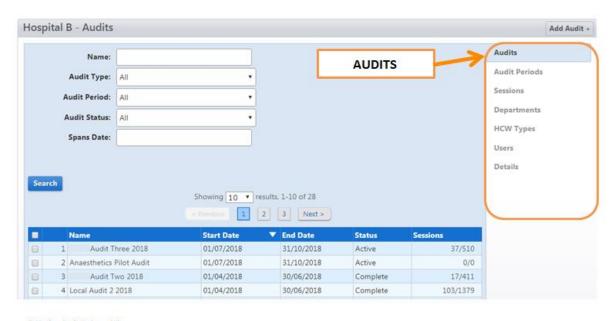
#### >Click Save

The new audit period will be added to the list of Audit Periods for the organisation.

N. B the end date cannot be in the past. You can however amend the end date after creating the local audit.

#### Step 2. Adding a Local Audit

>Click Audits in the Organisation Menu.

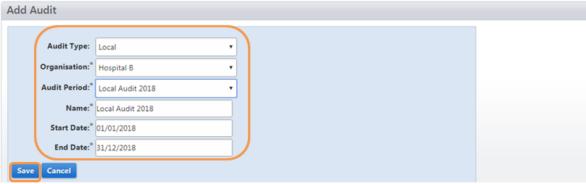


#### >Click Add Audit+

Hospital B - Audits

>Audit Type 'Local'

>Select Audit Period created in step 1.



>Save



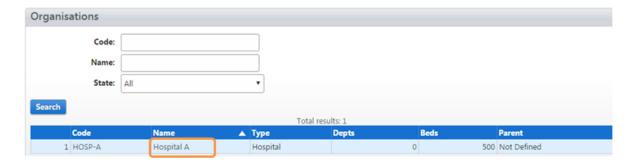
## **Changing the Dates of a Local Audit Period**

There may be occasions when an organisation needs to change the dates of a Local Audit Period.

>Click the Organisations button in the top level menu

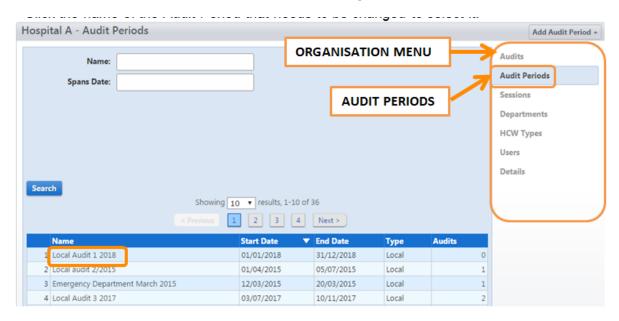


>Click the organisation's name to select it.



>Click Audit Periods in the Organisation Menu.

>Click the name of the Audit Period that needs to be changed to select it.



>Enter the new date





#### >Click Save

Remember, this has just changed the Audit Period dates. Any audits that have been created for the Audit Period will still have the previous date.

You will therefore need to either:

Change the end date of the audit via the Organisations Audit page; or

Add a new audit to the audit period. This will not affect reporting as the reports use the Audit Period not the Audit to group moments.

## **Temporary Audits**

Any Hand Hygiene Compliance data collected on a mobile device that has not been synced before the audit changes to 'Complete' will now go automatically into a 'local audit' when the device is next synced. This prevents changes to the national reports after the reports have been finalised.

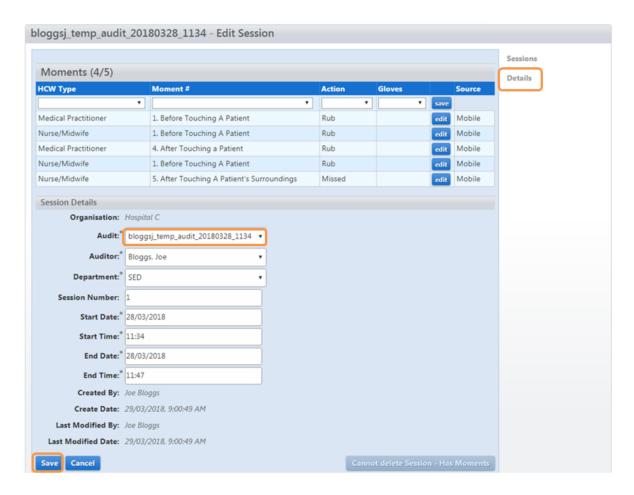
This local audit is generated by the database and will be named with the auditors 'username' and the date/ time of the sync.

Example: 'IgnazS temp audit 20160713 1156'

To change the Temporary Audit to either a National or Local Audit Period,

- >Click Audits in the Organisation Menu (1.2)
- >Click on the Temporary Audit name to open the Audit
- >Select the Details tab
- >Choose another Active Audit from the Audits tab
- >Save





To prevent temporary audits from occurring, all mobile devices should be synchronised after each session. Devices should be logged out by using the Logout button at the end of each audit period.



## **Managing Departments for an Organisation**

For users with role: Administrator - Organisation
Organisation Group
Region Group
Region

#### **Contents**

**Screen Overview** 

Viewing an Organisation's Departments

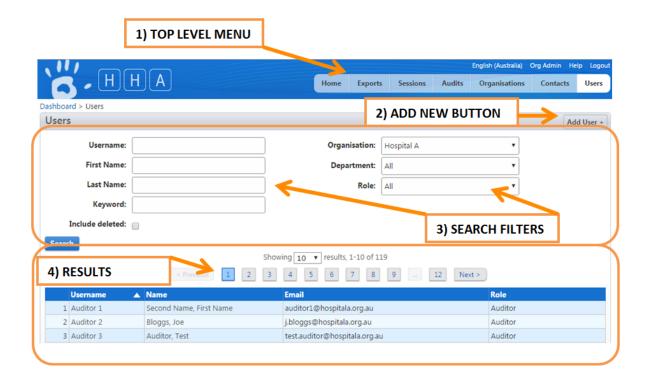
Editing an existing department

Inactivating or deleting an existing department

Adding a New Department

**Parent Departments** 

#### **Screen Overview**





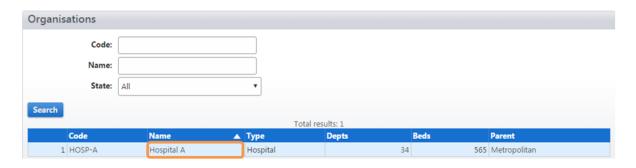
## **Viewing an Organisation's Departments**

>Login to Compliance Database

>Click the Organisations button in the top level menu



>Click the organisation's name to select it under the blue line



N.B. If you are responsible for multiple organisations you can use the search filters to narrow down the list of organisations displayed and then select the required organisation.



>Select Departments from the Organisation Menu on the right hand side

This will take you to the Organisation Departments page where you will see a list of departments for the selected organisation. From here you can manage the organisation's departments by adding a new department or editing and removing an existing one.

The list of departments can also be re-ordered by clicking the arrows to the left of the department list.



This order will be reflected in the drop down list for data entry.

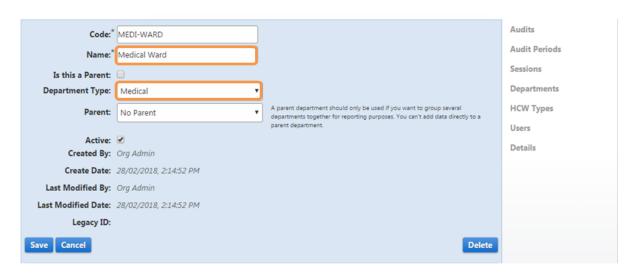


## **Editing an existing department**

>Click the code or name of the department you want to edit



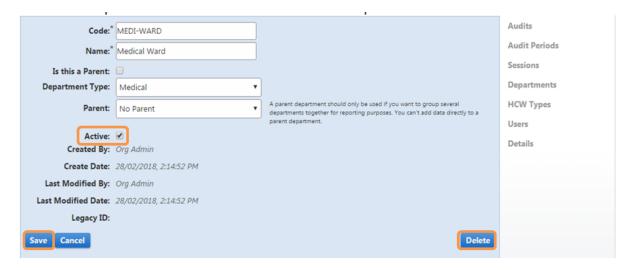
This will take you to that department's details screen where you are able to change the department name and department type.



>Click Save or Cancel to return to the department list.

## Inactivating or deleting an existing department

Select the department to be inactivated or deleted as per above



>To inactivate an existing department, uncheck the 'Active' box and Save.



The status will change to 'Inactive' in the department list. If a department is inactive, no further data can be entered into the department and the department will not appear in the drop down list for data entry. All data collected for that department will still be available in reports.

> To delete a department, select 'Delete' and then 'OK' in the pop-up box.

Only departments without associated hand hygiene auditing sessions can be deleted. Departments associated with hand hygiene auditing sessions will have the message "Cannot be deleted – Has Sessions" replacing the delete button.



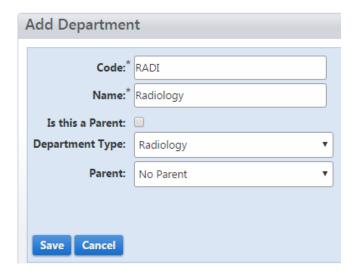
#### **Adding a New Department**

View the 'Departments' page for the organisation you wish to add a department to as per above

>Select Add Department +



- >Enter a unique code for the department
- >Enter the name of the department as you want it to appear on the reports
- >If applicable select a parent department (see below)
- >Select the ward type
- >Click Save



#### **Parent Departments**



A parent department can be created to group a number of departments together for reporting purposes. For example, you could create a parent department called Medical Wards and then allocate each of an organisation's medical wards to this parent department. You would then be able to generate compliance rates for each ward along with an overall rate for all the medical wards combined in the parent department.

A parent department cannot have data attached to it.

To create a parent department,

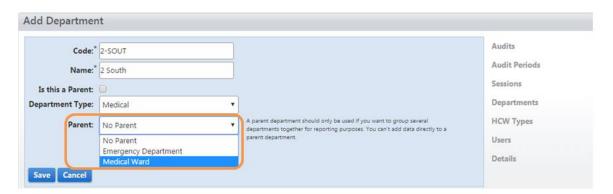
>check the box 'Is this a Parent'

>Save



>The parent will now appear in the dropdown list for non-parent departments

>Select parent and Save





## Managing Healthcare Worker Types (HCW) for an Organisation

For users with role: Administrator - Organisation
Organisation Group
Region Group
Region

#### **Contents**

**Screen Overview** 

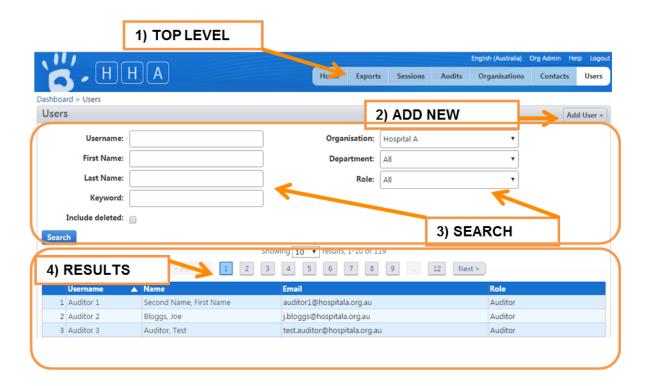
Viewing an Organisation's HCW Types

Editing an existing HCW type

Inactivating or deleting an existing HCW Type

Adding a New HCW Type

#### **Screen Overview**





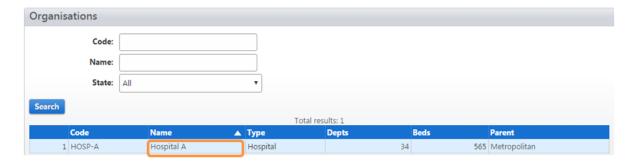
## **Viewing an Organisation's HCW Types**

>Login to Compliance Database

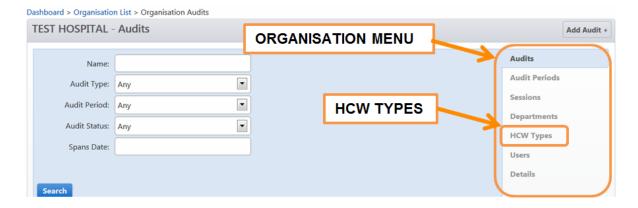
>Click the Organisations button in the top level menu



>Click the organisation's name to select it under the blue line



N.B. If you are responsible for multiple organisations you can use the search filters to narrow down the list of organisations displayed and then select the required organisation.



>Select HCW Types from the Organisation Menu on the right hand side

This will take you to the Organisation's HCW Types page where you will see a list of HCW types for the selected organisation.





From here you can manage the organisation's HCW types by adding a new HCW Type, or editing an existing one, or marking an existing HCW type "inactive" to hide it from during data entry and reporting.

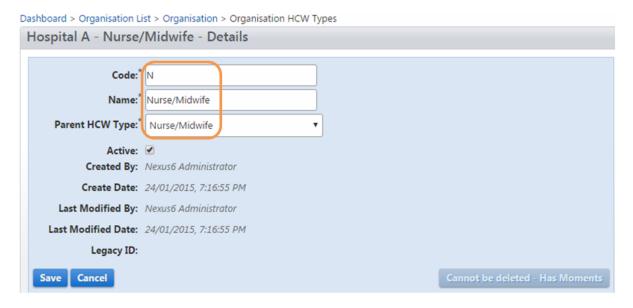
The list of HCW Types can also be ordered by clicking the arrows at the left. This order will be reflected in the drop down list for data entry.

#### **Editing an existing HCW type**

>Click the code or name of the HCW type you want to edit



This will take you to that HCW Type's details screen where you are able to change the code, name and parent HCW Type.

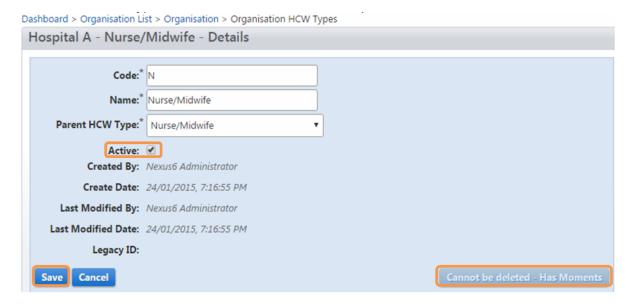


>Click Save or Cancel to return to the HCW Type list.



#### Inactivating or deleting an existing HCW Type

Select the HCW Type to be inactivated or deleted as per above



>To inactivate an existing HCW Type, uncheck the 'Active' box and Save.

The status will change to 'Inactive' in the HCW Type list. If a HCW Type is inactive, no further data can be entered against that HCW Type. The HCW Type will also not appear in the drop down list for data entry. Historical data collected against the HCW Type will still be available in reports.

> To delete a HCW Type, select 'Delete' and then 'OK' in the pop-up box.

Only HCW Types without associated hand hygiene auditing data can be deleted. HCW Types associated with hand hygiene auditing data will have the message "Cannot be deleted – Has Moments" replacing the delete button.

## **Adding a New HCW Type**

Parent HCW Types are set by HHA and cannot be edited or deleted.

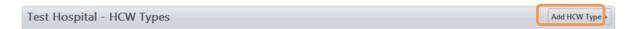
New HCW Types however can be created and assigned to one of the Parent HCW Types. This allows various craft groups to be grouped under a Parent HCW Type for local reporting purposes. Locally created HCW Types are not included in the National Reports. National Reports only report the overall Parent HCW Types.

For example, you could create new HCW Types such as Physiotherapist, Occupational Therapist, and Dietician etc. All of these would have the same Parent HCW Type "Allied Health Care Worker". You would then be able to generate compliance rates for each local HCW Type as well as an overall rate for all Allied Health combined.



View the HCW Types page for the organisation you wish to add a department to as per above.

>Select Add HCW Type +



- >Enter a unique code for the new HCW Type
- >Enter the name of the HCW Type as you want it to appear on the reports
- >Select the applicable Parent HCW Type



>Click Save



## Adding a User as an Auditor for an Organisation

For users with role: Administrator - Organisation
Organisation Group
Region Group

Region

#### **Contents**

**Screen Overview** 

Viewing an Organisations' users

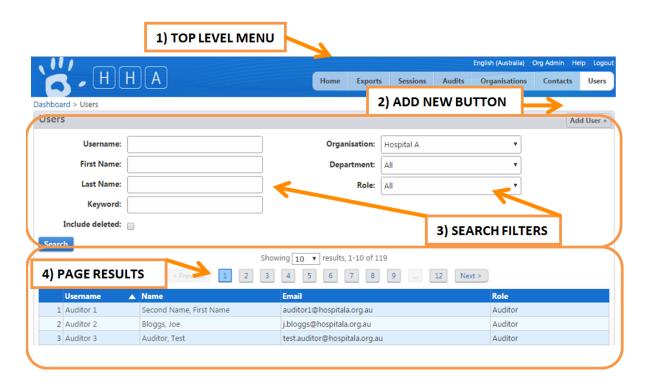
Adding an existing User to the role of Auditor at an Organisation

**Detaching an Auditor** 

**Creating a New User** 

Adding or detaching an auditor directly from the users profile page

#### **Screen Overview**





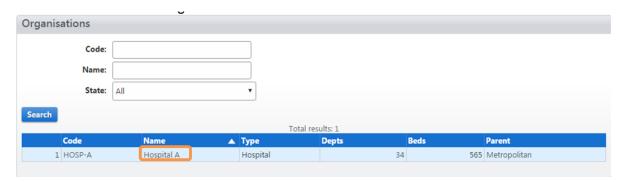
#### Viewing an Organisations' users

>Login to Compliance Database

>Click the Organisations button in the top level menu



>Click the name of the organisation under the blue line to select it.



N.B. If you are responsible for multiple organisations you can use the search filters to narrow down the list of organisations displayed and then select the required organisation.



>Select Users from the Organisation Menu on the right hand side

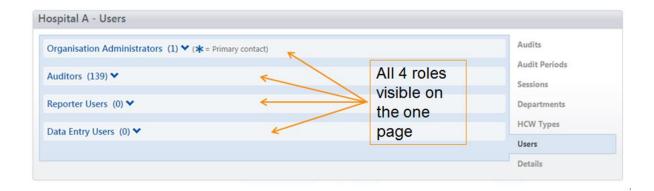
This will take you to the Organisation Users page where you will see a list of all roles for the selected organisation.

>View list of auditors by selecting dropdown box

From here you can manage the organisation's auditors by adding a new auditor or editing and removing an existing one.

Reporters and Data Entry users cannot be added or removed from this page unless they have been attached at the organisation level. If they are attached at the department level, go to the Departments tab and click on the required department.





#### Adding an existing User to the role of Auditor at an Organisation

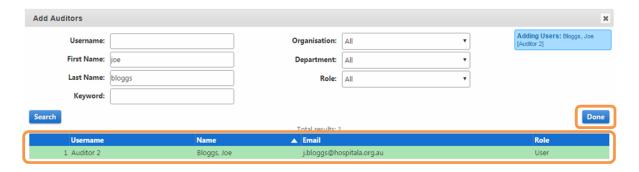
>Click 'Add New+' next to Auditor



The list of users displayed contains all users that have previously been allocated roles to your organisation(s) along with any users that have not been allocated to a role at any organisation.

N.B. Use the search criteria above the Search button to filter the list to make it easier to find a user.

>Click on the user(s) you wish to add as an auditor to select them. The selected user(s) will be highlighted green



#### >Click Done

If the auditor is not already a user in the Compliance Database you will need to create them as new user (see section below for instructions for Creating a new User).



If an auditor has already been added to the Compliance Database as a User by an organisation that you are not an administrator for, you will need to contact a higher administrator who can access your organisation and the other organisation. For example, a region administrator can allocate a user from another organisation from the same region or region group or a state administrator would need to allocate a user from another region.

#### **Detaching an Auditor**

To remove an auditor from your organisation

>Click Edit List

>Click on the red dot beside the auditor's name.



#### >Click Save

Roles can also be detached directly from the Users profile page (see below Adding or detaching an auditor directly from the users profile page)

N.B. The auditor is only detached from the organisation, not deleted from Compliance Database.

Compliance Database will automatically detach auditors who have not collected data in more than 2 years. These auditors will become 'Users' (not deleted) and can be reattached by an Organisation Administrator. Once deemed suitably retrained, the auditor is considered validated and can resume data collection. Lapsed Auditor retraining should include: Completion of an auditor learning module, further theory training with the hand hygiene lead/ other auditor and practical auditing training with the hand hygiene lead/ other auditor.

https://www.hha.org.au/audits/auditor-training/auditor-validation



## **Creating a New User**

>Login to Compliance Database

>Click the Users button in the top level menu



#### >Click Add User +

>Enter a unique Username for the Auditor to use when logging in to the Compliance Database.

The username can be in any format you choose, e.g. FirstNameLastName.

>Enter the user's First Name.

>Enter the user's Last name

>Enter an email address that can be used to recover a lost password

>Enter the user's contact details (optional)

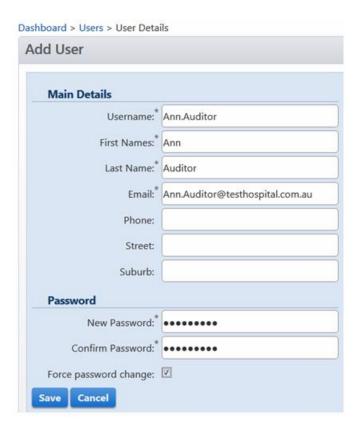
>Enter a Password of your choice.

>Confirm the Password by re-entering it.

Nb. Checking the Force password change box is an additional security measure that will allow you to tell the user a password that they will be made to change the first time they login.

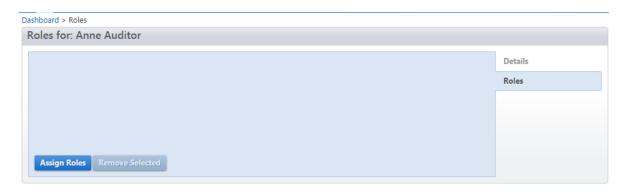
>Click Save to add the user to Compliance Database.





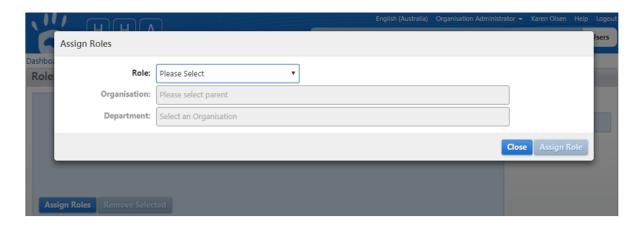
The new user can now be allocated to a role

## >Click Assign Role



>Select Role and level (organisation +/- department depending on level of access required)





## >Assign Role

Auditors only require one login which should be personalised with current contact details. All data collected by an auditor must be attributed to the auditor it was collected by. If an Auditor has multiple logins, please use the 'Contact Us' page of the Hand Hygiene Australia website.

## Adding or detaching an auditor directly from the users profile page

Roles can be added (if they are already attached to your organisation) or removed directly from a user's profile page.

>Click the Users button in the top level menu



- >Use the search criteria above the Search button to filter the list
- >Search
- >Click on the name of the required user in the search results to open their profile page
- >Click on the Roles tab





- >To assign a new role, click on the Assign Roles button
- >Select Role and level (e.g. organisation or department)
- >Assign Role
- >To detach a role, check the box beside the role to be removed
- >Click Remove Selected



# Add Session data for an Organisation – non-Auditor

For users with role:

Administrator 
Organisation

Organisation Group

Region Group

Region

Data Entry

#### **Contents**

**Screen Overview** 

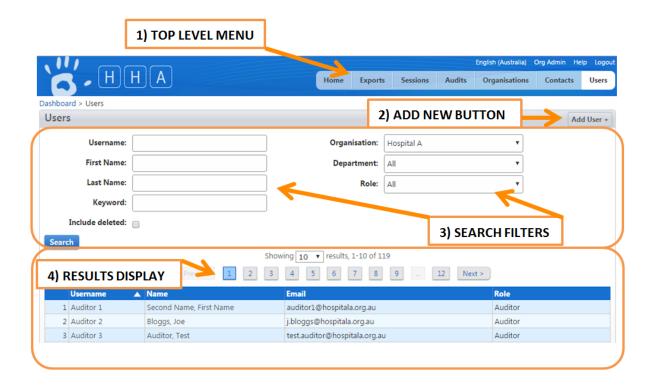
Accessing the Sessions page

Adding a new Session

**Editing a session's moments** 

Editing a session's details page

## **Screen Overview**





# **Accessing the Sessions page**

>Login to Compliance Database

There are 3 ways to access the Session Page -

For Auditors and Department Administrators

The sessions page is their home page

For Organisation Administrators

>Click the Sessions button in the top level menu



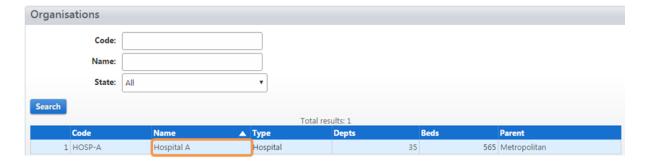
OR

For Organisation, Region or Organisation Group Administrators to view a single organisation's sessions

>Click the Organisations button in the top level menu



If you are responsible for several organisations you can use the Search criteria to find the organisation

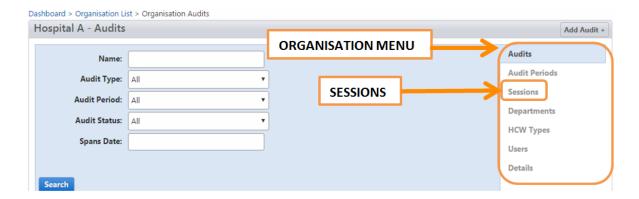


>Click on the name of the Organisation

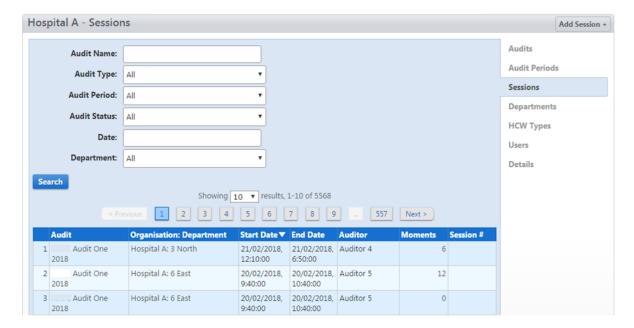
This will take you to the Organisation Administration screen

>Click Sessions in the Organisation Menu if not already selected.





All methods will take you to the Sessions page where you will see a list of Sessions for the user or selected organisation(s).



The Sessions page displays either all the sessions for any organisation that a user is linked to or just the sessions for the selected organisation.

N.B. You can use the search filters to narrow down the list of sessions if you are searching for a previously entered session.

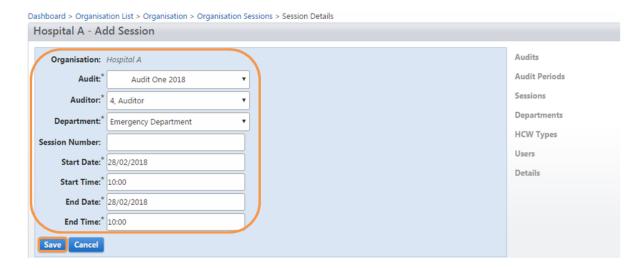
# **Adding a new Session**

>Click Add Session +



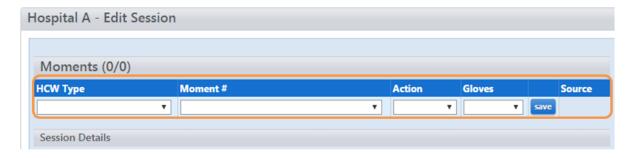
>Enter the required session details





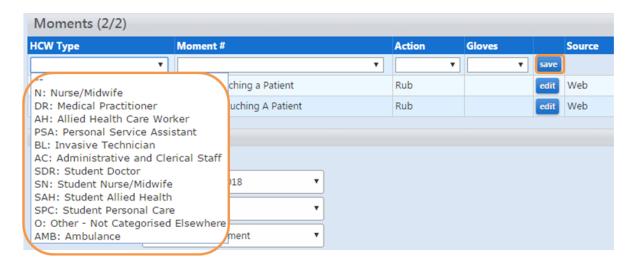
#### >Save

The Moment entry section will appear above the session details



There are 2 ways to enter data into the fields

Selecting the required value from the Dropdown Lists



Using the Keyboard



For example, when entering data into the HCW Type field, typing the first letter of the HCW Type, will select that HCW Type, e.g. typing N on the keyboard will select Nurse. Where a HCW Types share the same first letter, typing the letter again will toggle through the HCW Types for that letter, e.g. typing A will select Allied Health Care Worker and typing A again will select Administrative and Clerical Staff and typing A again will return the selection to Allied Health Care Worker

Pushing the Tab key on the keyboard will move the focus to the next field. Depending on the type of internet browser you are using, the active field will be indicated by being highlighted in blue,



OR

Only the outline turning blue



Values in the Moment, Action and Glove fields can be selected by typing the number that precedes them in the dropdown list, e.g. typing 1 in the gloves field will select ON, typing 2 will select OFF for when gloves are removed. This will enable data entry operators to leave their left hand positioned over the number key pad of a keyboard and make it easier to "touch type" during data entry.

Once a HCW Type, Moment, Action and Glove value is entered you can click save button at the end of the row.

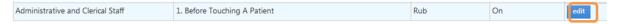


The moment is then saved to the session detailed below and a new row is presented for a moment to be added.



At the conclusion of entering data for a session, simply navigate to the page you want by using the top level menu or organisation men or close the browser to logout. There is no need to click the save button below the session details unless you change the session details.

You can change the values in a previously saved moment by clicking the edit button at the end of the row





# Editing a session's moments

If the status of an Audit is still "Active" the Moments in a session can be edited. This allows for the correction of data entry errors or returning to a session where data entry was incomplete.

>Access the Sessions page

>Click the Session under the blue line in the search results

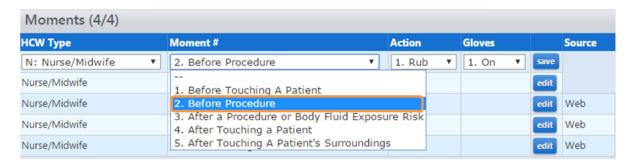
A page displaying the session details and moments will be opened

To edit a previously entered Moment

>Click edit next to the Moment you want to change



>Make the change to the field(s) you want to change.



>Click the save button next to the moment that has been edited.

This saves the moment to the session details below. There is no need to click the save button below the session details.

# Editing a session's details page

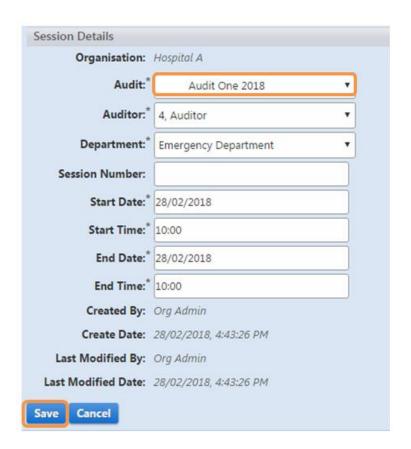
If the status of an Audit is still "Active" the session details can be edited. This allows the correction of previously entered details. For example, if the wrong department was selected, use the drop down box to change it. Or, if the wrong Audit was selected, use the drop down box to change it.

>Access the Sessions page

>Click the Session under the blue line in the search results

>Make the change to the required field(s) in the Session Details section





>Click Save



# Add Session data for an Organisation as an Auditor

For users with role:	Auditor

#### **Contents**

**Screen Overview** 

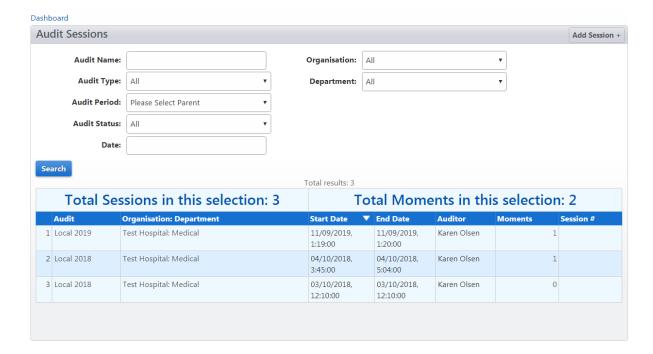
Accessing the Sessions page

**Adding a new Session** 

**Editing a session's moments** 

Editing a session's details page

## **Screen Overview**



# **Accessing the Sessions page**

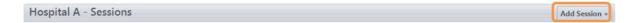


For Auditors and Department Administrators the session's page is their home page. The Sessions page displays either all the sessions for any organisation that a user is linked to or just the sessions for the selected organisation.

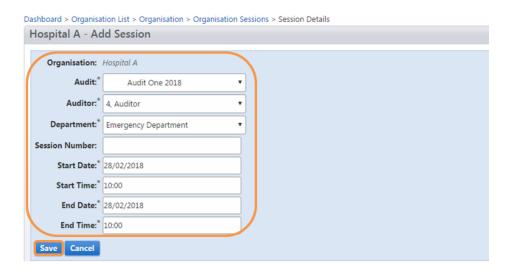
N.B. You can use the search filters to narrow down the list of sessions if you are searching for a previously entered session.

# **Adding a new Session**

>Click Add Session +



## >Enter the required session details



>Save

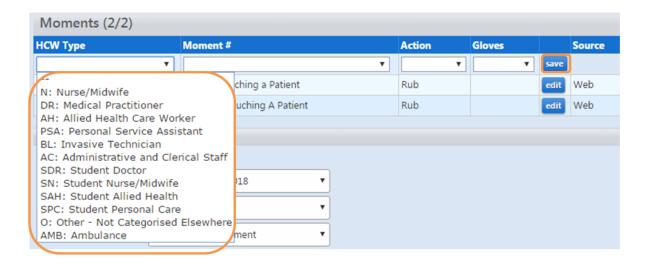
The Moment entry section will appear above the session details



There are 2 ways to enter data into the fields

Selecting the required value from the Dropdown Lists





#### Using the Keyboard

For example, when entering data into the HCW Type field, typing the first letter of the HCW Type, will select that HCW Type, e.g. typing N on the keyboard will select Nurse. Where a HCW Types share the same first letter, typing the letter again will toggle through the HCW Types for that letter, e.g. typing A will select Allied Health Care Worker and typing A again will select Administrative and Clerical Staff and typing A again will return the selection to Allied Health Care Worker

Pushing the Tab key on the keyboard will move the focus to the next field. Depending on the type of internet browser you are using, the active field will be indicated by being highlighted in blue,



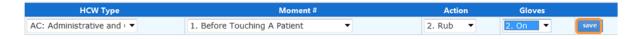
OR

Only the outline turning blue



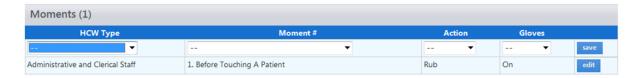
Values in the Moment, Action and Glove fields can be selected by typing the number that precedes them in the dropdown list, e.g. typing 1 in the gloves field will select ON, typing 2 will select OFF for when gloves are removed. This will enable data entry operators to leave their left hand positioned over the number key pad of a keyboard and make it easier to "touch type" during data entry.

Once a HCW Type, Moment, Action and Glove value is entered you can click save button at the end of the row.



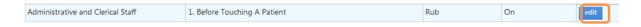


The moment is then saved to the session detailed below and a new row is presented for a moment to be added.



At the conclusion of entering data for a session, simply navigate to the page you want by using the top level menu or organisation men or close the browser to logout. There is no need to click the save button below the session details unless you change the session details

You can change the values in a previously saved moment by clicking the edit button at the end of the row.



## Editing a session's moments

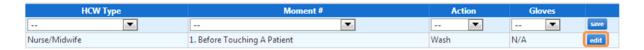
If the status of an Audit is still "Active" the Moments in a session can be edited. This allows for the correction of data entry errors or returning to a session where data entry was incomplete.

- >Access the Sessions page
- >Click the Session under the blue line in the search results

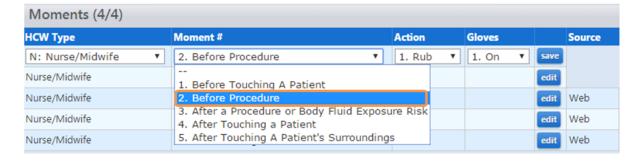
A page displaying the session details and moments will be opened

To edit a previously entered Moment

>Click edit next to the Moment you want to change



>Make the change to the field(s) you want to change.



>Click the save button next to the moment that has been edited.

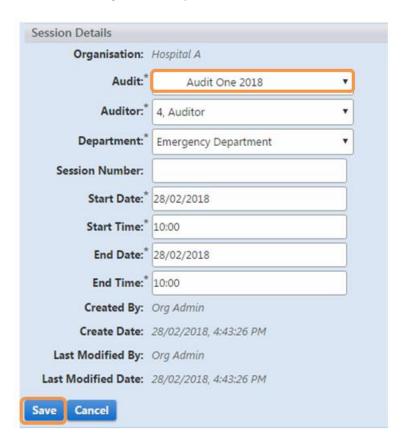


This saves the moment to the session details below. There is no need to click the save button below the session details.

# Editing a session's details page

If the status of an Audit is still "Active" the session details can be edited. This allows the correction of previously entered details. For example, if the wrong department was selected, use the drop down box to change it. Or, if the wrong Audit was selected, use the drop down box to change it.

- >Access the Sessions page
- >Click the Session under the blue line in the search results
- >Make the change to the required field(s) in the Session Details section



>Click Save



## **Submit an Audit**

For users with role: Administrator - Organisation
Organisation Group
Region Group
Region

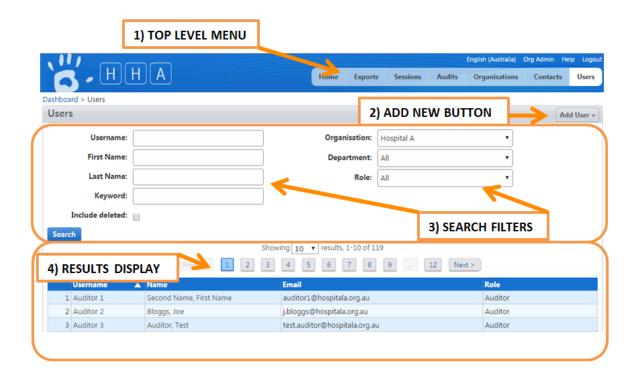
#### **Contents**

**Screen Overview** 

**Accessing the Audits Page** 

**Submitting the Audit** 

## **Screen Overview**



# **Accessing the Audits Page**

>Login to Compliance Database

There are 2 ways to access the Audits Page

To view and access all audits for the organisation(s) that you are an administrator for.

>Click the Audits button in the top level menu





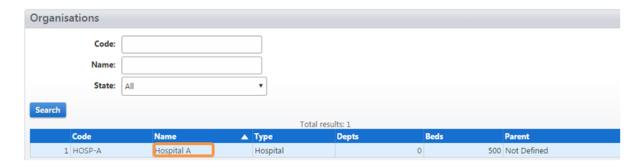
OR

To view and access audits for a single organisation only

>Click the Organisations button in the top level menu



>Click an organisation's name to select it.



This will take you to the Organisation Administration screen

>Click Audits from the Organisation Menu if not already selected.

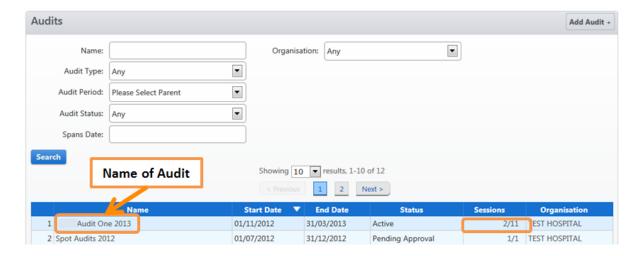


Both methods will take you to the Audits page where you will see a list of Audits for the selected organisation(s).

# **Submitting the Audit**



The list of Audits for the selected organisation displays the name of the Audit, the start and end date and status. The sessions column displays how many sessions/moments have been collected for the audit. In the example below, the audit has 2 sessions for a total of 11 moments

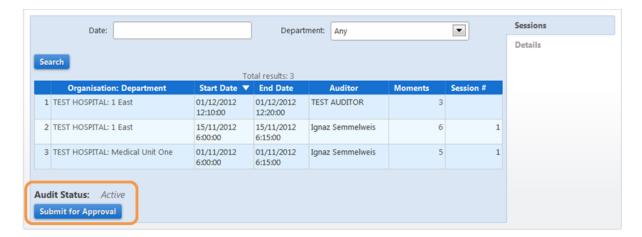


Nb. You can use the search filters to narrow down the list of audits

>Click the name of the Audit to select it

The page that opens displays the sessions and status for the selected audit.

If the audit status is "Active", the Submit for Approval button will be visible



>Click the Submit for Approval Button

A pop up message will appear asking you to confirm that the audit should be submitted. Once an audit has been submitted it can no longer have sessions added to it.

>Click OK if the audit is complete.

On the audit page the Add Session button is now disabled and the Audit Status is changed to "Pending Approval".



Once the audit has been approved by an administrator(s) at a higher level (if relevant), the status will change to "Complete"



# **Generating Compliance Database Reports – New Zealand Users**

For users with role: Administrator - Organisation

**Organisation Group** 

Region Group

Region

Reporter - All levels

#### **Contents**

**Screen Overview** 

**View Reports** 

**Standard Reports** 

**Compliance Reports** 

**Poster Reports** 

**Auditor and Sessions Report** 

**Export CSV Line Data** 

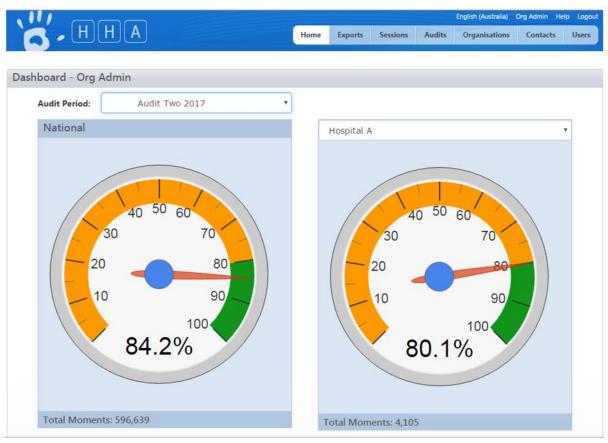
**Custom Reports** 

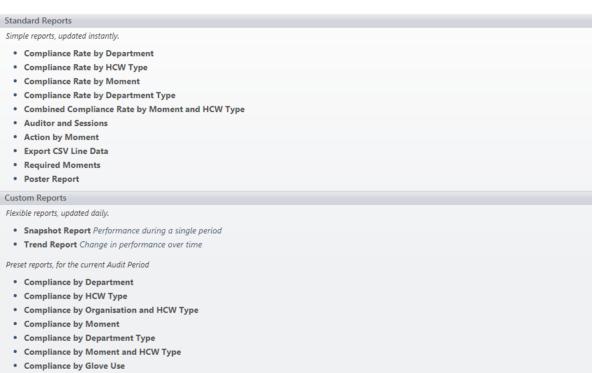
**Snapshot Reports** 

**Trend Reports** 



## **Screen Overview**







## **View Reports**

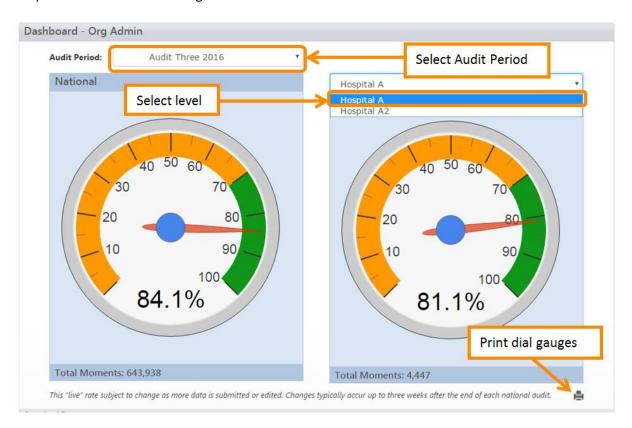
>Login to Compliance Database

>The reports page is the 'Home' page for all users with reporting privileges

The dial gauge on the left indicates the current national overall compliance rate for the active national audit period. The audit period can be changed by using the dropdown box. This allows past audit periods to be viewed.

The dial on the right indicates the current compliance rate for the level that the user has reporting privileges for. A region administrator would therefore see their regions overall compliance rate and likewise an organisation administrator would see their organisations compliance rate. The compliance rate will change if a different audit period is selected.

Region administrators with access to more than one region can use the dropdown box to select the region. Organisation administrators with access to more than one organisation can use the dropdown box to select the organisation.

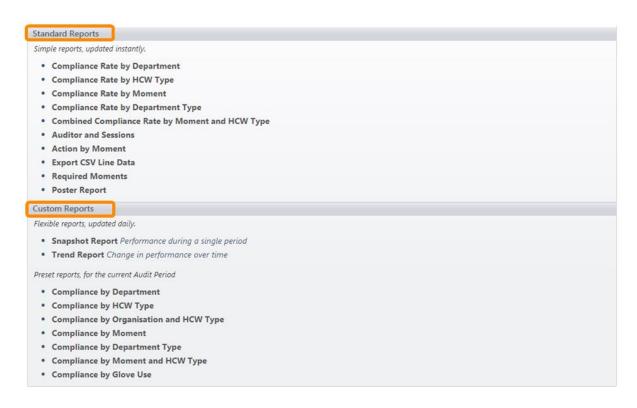


The reports section contains the list of reports that a user has access to.

This list will look different for each level of user.

There are 2 main types of reports – Standard reports and Custom reports





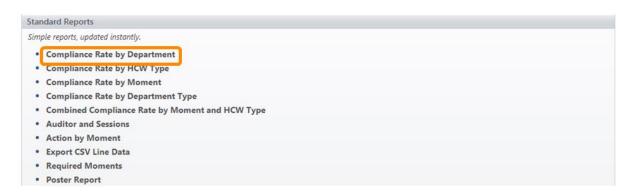
>Click on the report you wish to run to select it.

## **Standard Reports**

Standard reports are simple reports that are updated instantly.

## **Compliance Reports**

>Click on the report you wish to run



>Enter the values required into the search fields

>Check box to include all departments attached to the organisation

Data selected can be by audit period (national or local) **or** by date range. To select all data, leave the National Audit Period and Local Audit Period filters at 'All' and select a date range.



## >Click Run Report



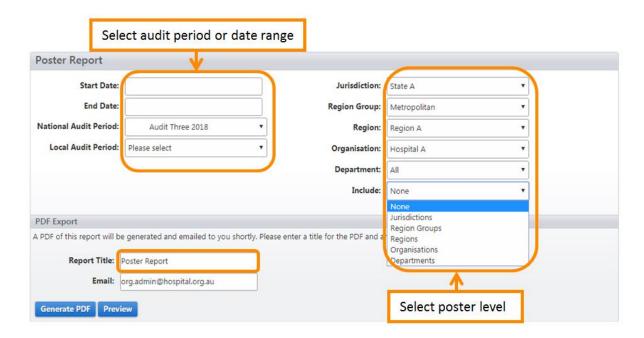
The report data will be displayed in tabular format and a bar chart. This can be exported into a spreadsheet program such as MS Excel for further analysis and charting or downloaded as a PDF.





## **Poster Reports**

Poster reports are designed as a one page display of results. The level of poster depends on the user. A region administrator can get posters at the region level and below. An organisation administrator can get posters at the organisation level and below. A NUM can only get a poster for the department that they are attached to.

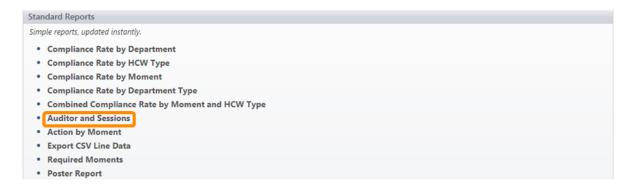


- >Select the audit period or date range
- >Select the organisation. Select the department. To get a poster for a specific department, choose the department. To get posters for all departments, leave the department filter at 'All' and select 'Departments' in the 'Include' filter.
- >Report Title add a name
- >Email check the email address is correct
- >Preview check reports prior to downloading
- >Generate PDF reports will be sent to the email address
- >Exports tab reports are also available in the exports tab for 7 days



## **Auditor and Sessions Report**

Auditor and sessions reports enable an organisation to review the number of moments collected by their auditors and the average compliance rate of the data collected. This report should be run as part of the data validation process.



## >Select Auditor and Sessions report



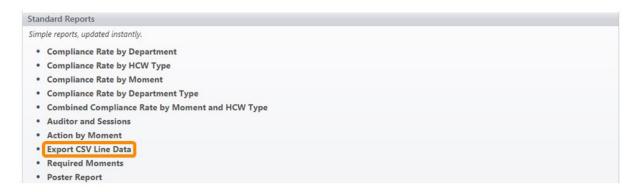
- >Select audit period or date range
- >Select organisation
- >Check box to include all auditors attached to the organisation
- >Run Report
- >Download PDF or spreadsheet

## **Export CSV Line Data**

CSV Line Data reports provide a file of all moments line by line.

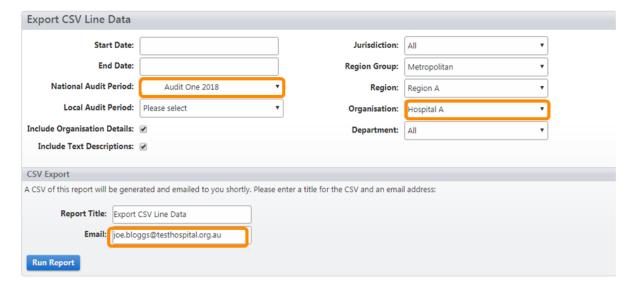
>Select Export CSV Line Data





>Filter by date or audit period

- >Filter by level required (region, organisation, department)
- >Check boxes for extra organisation details and text descriptions if required
- >Check the email address in the Email box is correct



>Run Report

The CSV file will be sent to the email address in the email field and can also be retrieved for 7 days from the Exports tab at the top of the page

# **Custom Reports**

Custom reports include flexible reports and pre-set reports. Data is updated overnight.

## **Snapshot Reports**

Data from a specific period

Step 1. Select Content

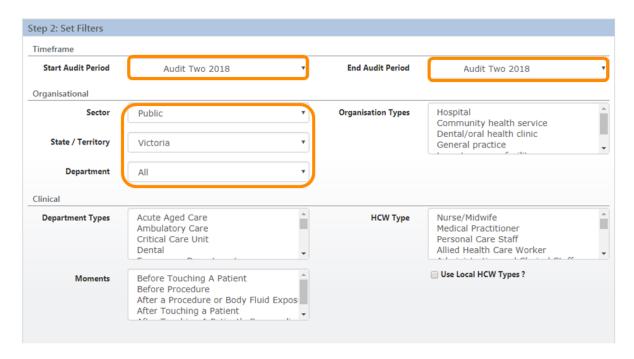




>Select the Period Type – the period type can be an audit period or can be a specific time frame of Year/month

>Select Entity Type

Step 2. Set Filters



>Select the time frame start and end

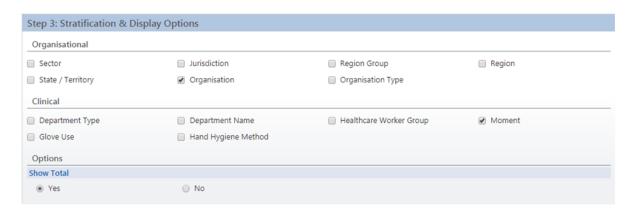
>Select the organisation/department

Further filters can be applied if required. For example, click on Nurse/Midwife to only include this data. To select more than one HCW Type, press 'Ctrl' whilst clicking the next HCW Type to be included. To remove this selection, press 'Ctrl' whilst clicking on the highlighted HCW Type.

If HCW Types have been personalised, these can be included in the report by checking the box 'Use Local HCW Types?' If left unchecked, the Parent HCW Types will be in the report.

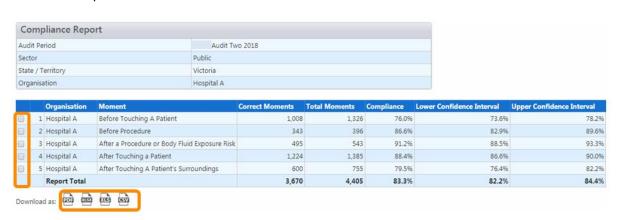


Step 3. Stratification and Display Options



>Select the columns that you want to add to the report. Each selection here will create another column in the results table.

#### >Generate Report



>Download data as a PDF or to a spreadsheet

>Check the boxes on the left to include in the graph or leave the boxes unchecked to include all rows in the graph

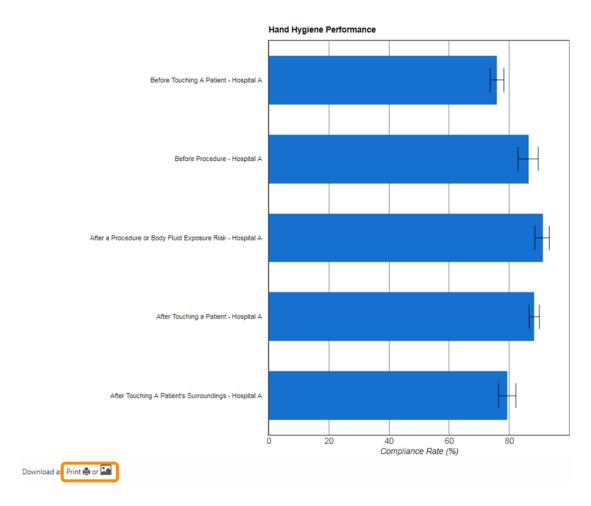
Modifying your report – When you generate a report, the report builder tab remains open and the report opens in a new tab. You can return to the report builder tab to modify your report then click 'Generate Report' again.

Note: Reports that stratify by healthcare worker and department can only be run at the level of a single organisation.

>Generate Graph

>Download graph as a PDF or image or print





To 'Save As PDF' via the Print button

>Click 'Print'

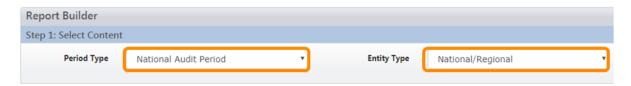
>'Change' Destination to 'Save as PDF'

>Save

# **Trend Reports**

Changes in data over time

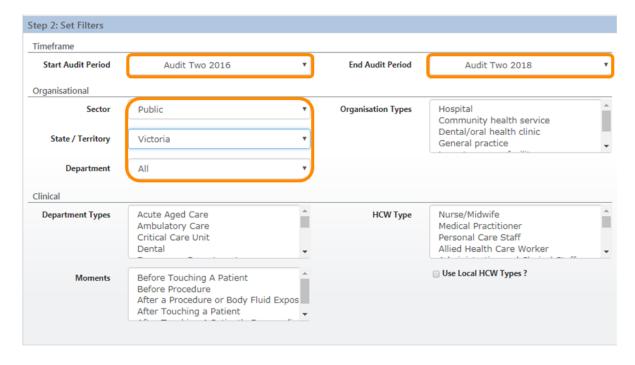
Step 1. Select Content



>Select the Period Type and the Entity Type



Step 2. Set Filters



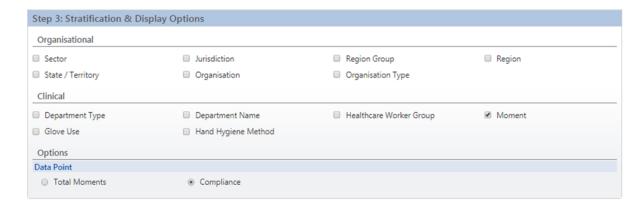
>Select the time frame start and end

>Select the organisation/department

Further filters can be applied if required. For example, click on Nurse/Midwife to only include this data. To select more than one HCW Type, press 'Ctrl' whilst clicking the next HCW Type to be included. To remove this selection, press 'Ctrl' whilst clicking on the highlighted HCW Type.

If HCW Types have been personalised, these can be included in the report by checking the box 'Use Local HCW Types?' If left unchecked, the Parent HCW Types will be in the report.

Step 3. Stratification and Display Options

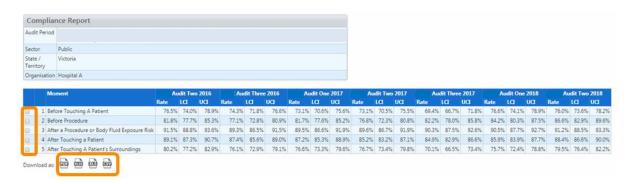


>Select the fields that you want to add to the report.

>Select the Data Point - either Total Moments or Compliance



#### >Generate Report



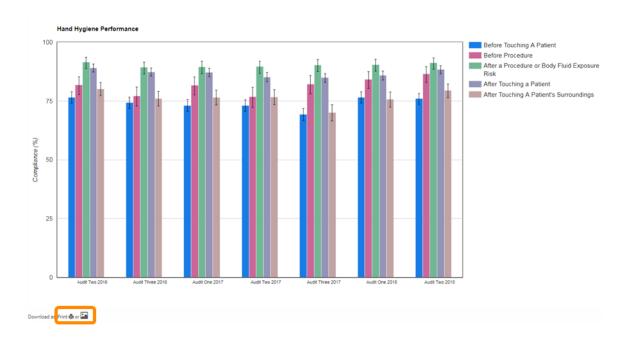
#### >Download data as a PDF or to a spreadsheet

Modifying your report – When you generate a report, the report builder tab remains open and the report opens in a new tab. You can return to the report builder tab to modify your report then click 'Generate Report' again.

>Check the boxes on the left to include in the graph or leave the boxes unchecked to include all rows in the graph

#### >Generate Graph

Note: Graphs will not display if more than 10 rows are selected.



A one page 'Cheat Sheet' is available for Custom Reports



# **Generating Compliance Database Reports – non-NZ users**

For users with role: Administrator - Organisation

**Organisation Group** 

Region Group

Region

Reporter - All levels

#### **Contents**

**Screen Overview** 

**View Reports** 

**Standard Reports** 

**Compliance Reports** 

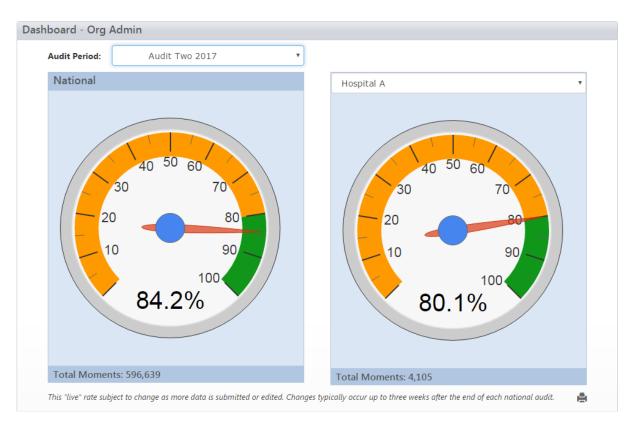
**Poster Reports** 

**Auditor and Sessions Report** 

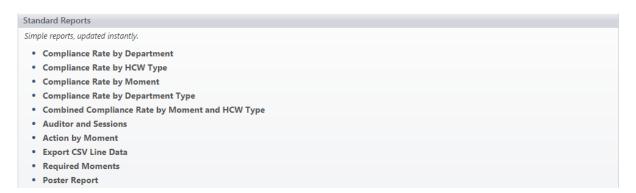
**Export CSV Line Data** 

## **Screen Overview**





(Please note: the compliance meters are not currently functional for non-NZ users).



# **View Reports**

>Login to Compliance Database

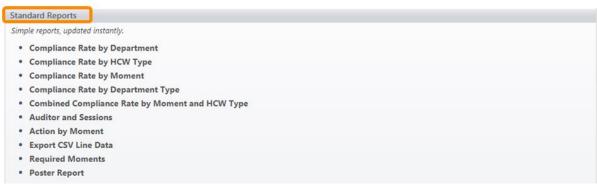
>The reports page is the 'Home' page for all users with reporting privileges

The reports section contains the list of reports that a user has access to.

This list will look different for each level of user.

# **Standard Reports**

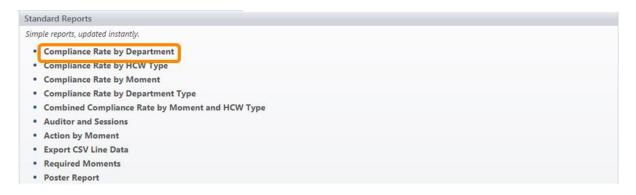




>Click on the report you wish to run to select it.

## **Compliance Reports**

>Click on the report you wish to run

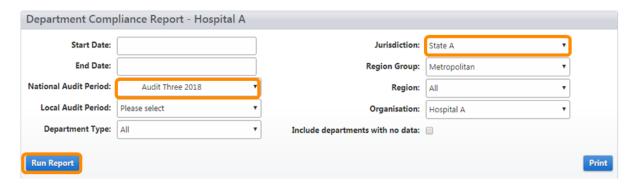


>Enter the values required into the search fields

>Check box to include all departments attached to the organisation

Data selected can be by audit period (national or local) **or** by date range. To select all data, leave the National Audit Period and Local Audit Period filters at 'All' and select a date range.

#### >Click Run Report



The report data will be displayed in tabular format and a bar chart. This can be exported into a spreadsheet program such as MS Excel for further analysis and charting or downloaded as a PDF.

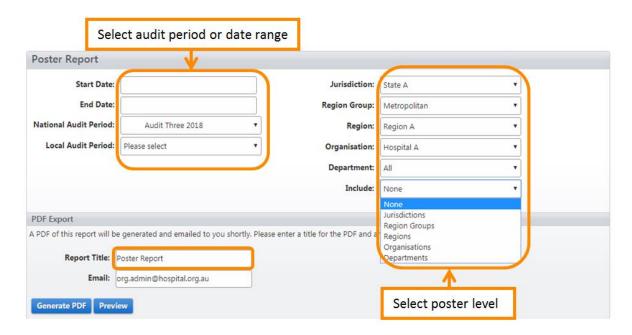




## **Poster Reports**

Poster reports are designed as a one page display of results. The level of poster depends on the user. A region administrator can get posters at the region level and below. An organisation administrator can get posters at the organisation level and below. A NUM can only get a poster for the department that they are attached to.





>Select the audit period or date range

>Select the organisation. Select the department. To get a poster for a specific department, choose the department. To get posters for all departments, leave the department filter at 'All' and select 'Departments' in the 'Include' filter.

>Report Title – add a name

>Email - check the email address is correct

>Preview - check reports prior to downloading

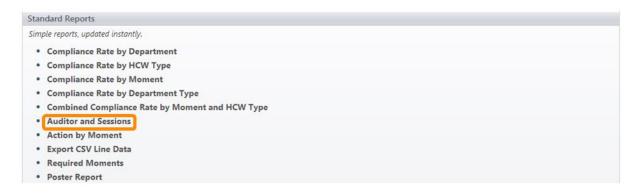
>Generate PDF – reports will be sent to the email address

>Exports tab – reports are also available in the exports tab for 7 days

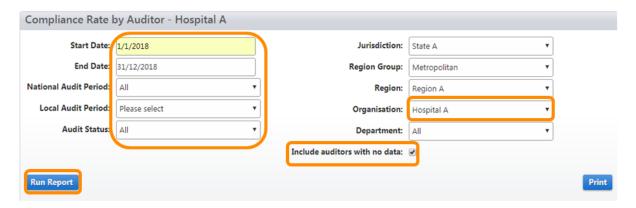
## **Auditor and Sessions Report**

Auditor and sessions reports enable an organisation to review the number of moments collected by their auditors and the average compliance rate of the data collected. This report should be run as part of the data validation process.





## >Select Auditor and Sessions report



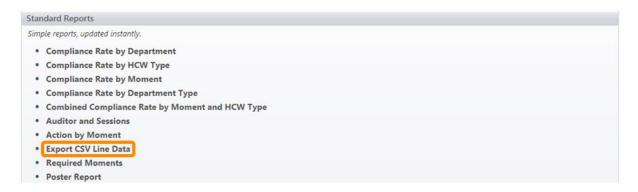
- >Select audit period or date range
- >Select organisation
- >Check box to include all auditors attached to the organisation
- >Run Report
- >Download PDF or spreadsheet

# **Export CSV Line Data**

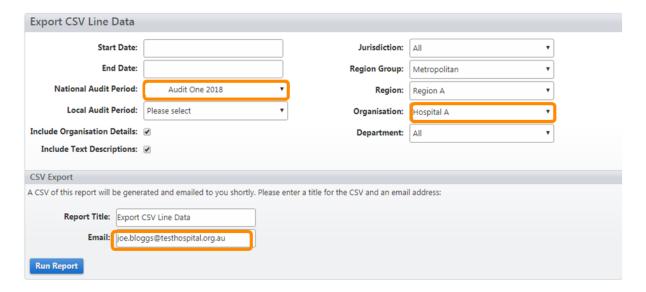
CSV Line Data reports provide a file of all moments line by line.

>Select Export CSV Line Data





- >Filter by date or audit period
- >Filter by level required (region, organisation, department)
- >Check boxes for extra organisation details and text descriptions if required
- >Check the email address in the Email box is correct



## >Run Report

The CSV file will be sent to the email address in the email field and can also be retrieved for 7 days from the Exports tab at the top of the page



# Mobile data entry

For users with role:	Auditor

#### **Contents**

Data Entry via a Mobile Device

Accessing and Logging into Compliance Mobile

**Entering Session Information** 

**Entering Moment Data** 

**Deleting an Active Moment** 

**Saving Moments** 

**Invalid Entry** 

**Ending a Session** 

Syncing a Session with the Compliance Database

**Logging Out** 

Data Usage

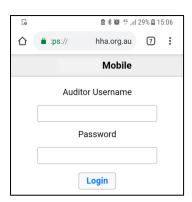
# **Data Entry via a Mobile Device**

You can access the mobile data entry application using the internet browser on your mobile device. The application has been designed to work with all internet browsers that are HTML 5 compliant, such as Safari on the iPhone or iPad. Most of the latest Android smart phones also have a compatible browser e.g. Chrome.

# **Accessing and Logging into Compliance Mobile**

To access the Compliance Mobile application, browse to <a href="https://compliance.hha.org.au/mobile">https://compliance.hha.org.au/mobile</a> on your mobile device





The first time you login to the mobile application you will need to be connected to the internet either via a local wireless network or if your device is 3G/4G enabled, via your carrier's 3G/4G network. Your departments and currently active audits will automatically be uploaded and stored to your device.

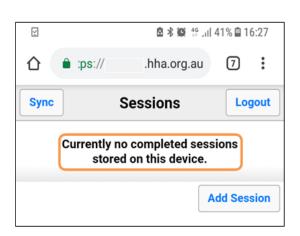
Subsequent logins **do not** require you to be connected to the internet, unless the Audit Name or Department information has been updated by your organisation administrator.

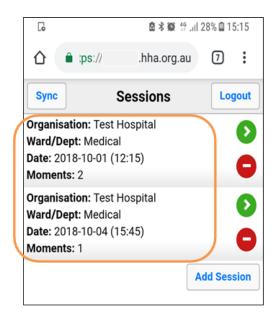
>Enter your <u>AUDITOR</u> username and password. (If you cannot login, please review the Compliance mobile Trouble shooting sections).

# **Entering Session Information**

Once logged in you will see the Sessions screen. On the Sessions screen you will either see that there are no sessions stored on the device or the sessions that are stored on your device waiting to be "Synced" to Compliance Database.

It is advisable to "Sync" your sessions regularly, preferably after each session.



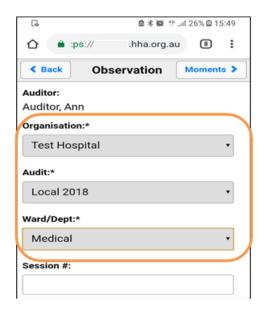




To start entering data for a new session:

>Click Add Session

On the Observation screen



>Select the appropriate Organisation, Audit Name, Ward/Dept name and Session # if required (optional)

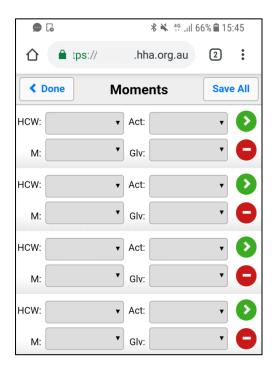
N.B. The date and time are automatically added to the session information. Make sure that these settings are correct on your device.

Once you have selected the correct session information

>Select the Moments button to move to the Moments screen



# **Entering Moment Data**



To enter data into the HCW, Action (Act), Moment type (M) or Glove fields (Glv)

>Select the required field and then select the appropriate value

N.B. Leave the Glove field blank if gloves were not put ON, taken OFF or CONTinued to be worn

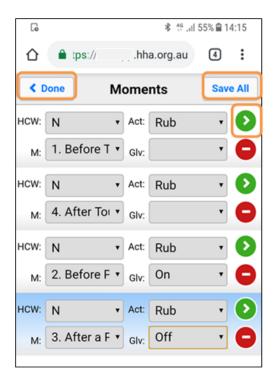
# **Deleting an Active Moment**

>Select the red circle next to the moment you wish to delete

# **Saving Moments**

Moments can be saved to the mobile device individually or the whole page can be saved at once.





>Select green arrow to save individual moments

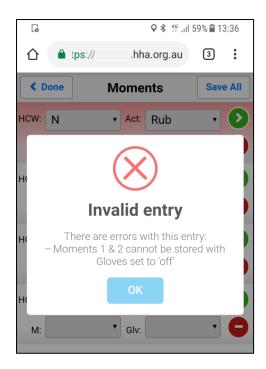
>Select 'Save All' to save all the moments on the page

>Select 'Done' when you have finished the session

# **Invalid Entry**

If the 'moment' breaches Compliance Database validation rules, you will get an error message when you try to save it. Select OK and make the required change to the moment field highlighted in red.





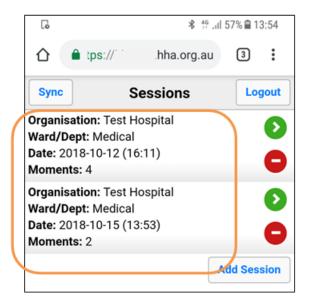
Once a moment has been saved you cannot edit it on your device. To make any changes you will need to "sync" the session (see below), login to the HHA website and access Compliance Database, find the session that needs editing and make the required changes there.

# **Ending a Session**

When you have completed a session

>Select Done

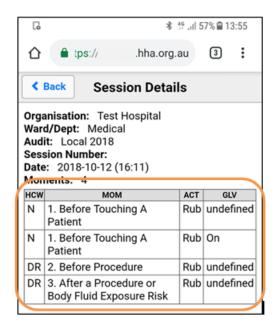
You will be returned to the Sessions page where you will see a summary of the session data.





Selecting the session summary will take you to a page displaying the session details and individual moments collected for that session.

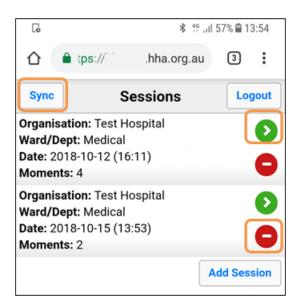
#### >Click on required session



>Select back to return to the Sessions page

# **Syncing a Session with the Compliance Database**

You will need to be connected to the internet either via a local wireless network or if your device is 3G/4G enabled, via your carrier's 3G/4G network. Syncing a session sends the data directly to Compliance Database and clears the session data from your device.





To Sync the all the sessions stored on your device

>Select Sync

To Sync an individual session

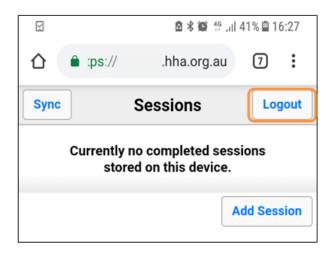
>Select the green arrow next to the session you want to Sync

To delete a session without syncing

>Select the red symbol next to the session you wish to delete. Any session deleted will be permanently deleted and **cannot** be recovered.

# **Logging Out**

When you have finished collecting data you should logout. It is preferable to logout regularly and particularly at the end of the audit period.



>Select Logout on the Sessions screen.

N.B. Changing a password on Compliance Database whilst still logged in to Compliance mobile can cause issues with syncing data already on the device (please see the Trouble shooting guide on the Instructions).

# **Data Usage**

Logging into Compliance mobile whilst connected to a 3G/4G network will use approx. 2048 bytes of your data plan. Syncing a session that contains 100 moments will use approx. 650 bytes of your data plan. Considering that a gigabyte is made up of 1,073,741,824 bytes, Compliance mobile has a relatively low data load.



# **Troubleshooting - Mobile Devices - Android**

For users with role: Auditor

Android Devices only - based on Samsung Galaxy s8

#### **Contents**

What are the benefits of using Compliance Mobile?

What is the difference between the Compliance Database and Compliance Mobile?

How can I quickly access Compliance Mobile?

How much of my data plan will I use if I collect moments on my personal device?

What if I can login to the Compliance Database on the computer but not Compliance mobile?

How do I reset my password if I have forgotten it?

What if the 'Forgot Password' function doesn't work?

How do I update my details or change my password?

Can I only enter four moments per session?

Why can't I Sync my data?

How do I manually enter data that can't be synchronised into the Compliance Database?

# What are the benefits of using Compliance Mobile?

Compliance Mobile is a 'paper free' method for auditors to 'sync' moments directly into the database. There are three main reasons to use Compliance Mobile:

- 1. Save time: Facilities using Compliance Mobile report a 50% reduction in data management
- 2. Data validation: data quality is optimised because of real-time application of validation rules
- 3. Immediate performance feedback: once the session is synced, it is available for immediate feedback to healthcare workers by using the Compliance website reporting tools.

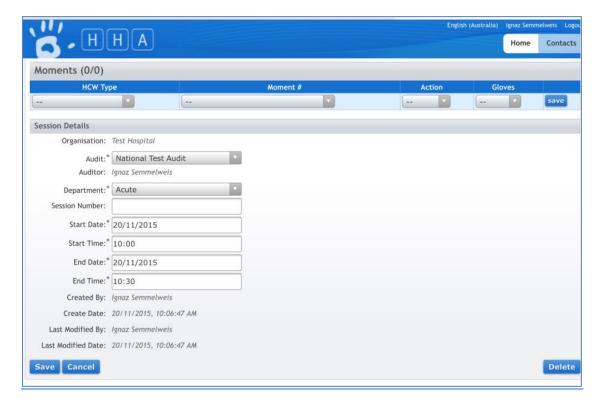


# What is the difference between the Compliance Database and Compliance Mobile?

The Compliance Database (<a href="https://compliance.hha.org.au">https://compliance.hha.org.au</a> and Compliance Mobile (<a href="https://compliance.hha.org.au/mobile">https://compliance.hha.org.au/mobile</a>) are two separate sites. Compliance Mobile allows entry and syncing of data only. All other functions such as adding audits, adding auditors, resetting passwords, adding departments, submitting completed audits and generating reports must be done on the Compliance Database. Data can only be entered one moment at a time on the Compliance Database but with Compliance Mobile four moments can be observed and audited simultaneously (note that whichever method is used, an unlimited number of moments can be added to each session).

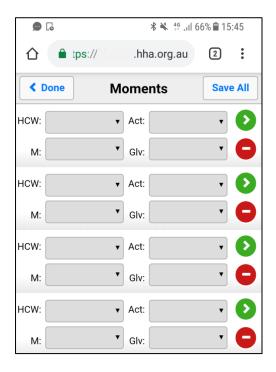
Note the different screenshots when entering data in either Compliance Database or Compliance mobile.

## **Compliance Database data entry screen**





# **Compliance Mobile data entry screen**

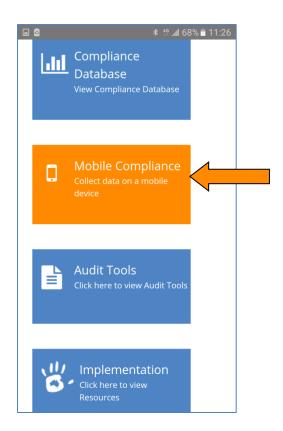


# How can I quickly access Compliance Mobile?

This can be done by adding a link to the home screen. Go to hha.org.au

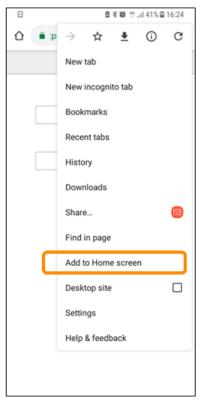
Scroll down to the blue buttons and click on Compliance Mobile

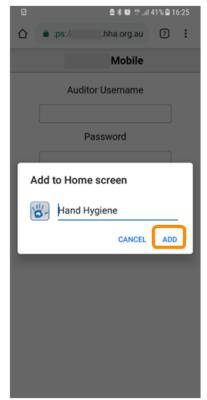




Or go to <a href="https://compliance.hha.org.au/mobile">https://compliance.hha.org.au/mobile</a>

Click on Menu ( ) and then select Add to Home screen, then ADD







The icon will appear and remain on your home screen. Clicking on this icon will take you directly to Compliance Mobile Login.

# How much of my data plan will I use if I collect moments on my personal device?

Auditing using a mobile device will result in minimal data usage on your plan.

Syncing 100 moments = 650 bytes

Most data plans are in gigabytes

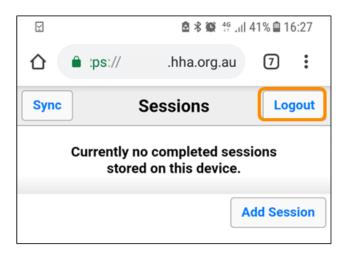
1GB = 1 billion bytes

# What if I can login to the Compliance Database on the computer but not Compliance Mobile?

If you can login to Compliance Database on the computer but not on Compliance Mobile then your username and password are correct. If this is the case try using a different internet browser e.g. Chrome

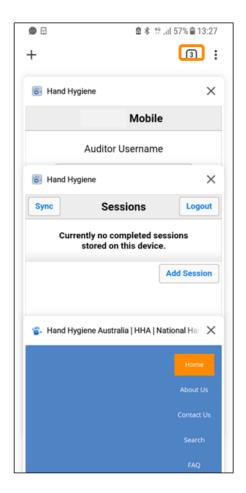
# How do I reset my password if I have forgotten it?

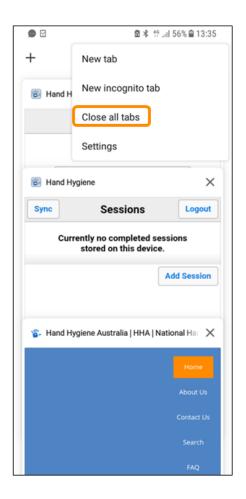
Prior to resetting your password it is important to ensure any previously collected sessions have been synchronised and you are logged out of Compliance Mobile on all devices you have ever previously been logged into by clicking on the Logout button. Simply closing the screen does not log you out.





To check you are logged out of all screens click the box with the number in the top right corner of the page and all open pages will appear (see below). If still logged in tap the page to open it and then click on Logout. If already logged out swipe the page left or right or click on the cross in the top right hand corner to close page. Click on to see menu and then click on Close all tabs to close all.



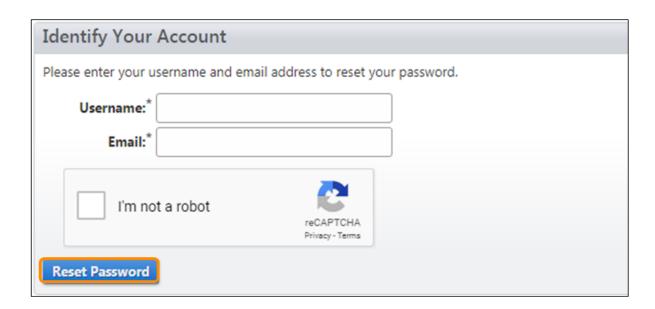


Then go to the Compliance Database at (<a href="https://compliance.hha.org.au">https://compliance.hha.org.au</a>) and click on Forgot your password?



You will be asked to enter your email address and a new password will be emailed to you.

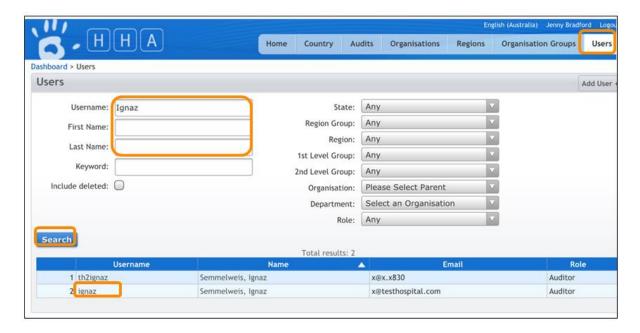




# What if the 'Forgot Password' function doesn't work?

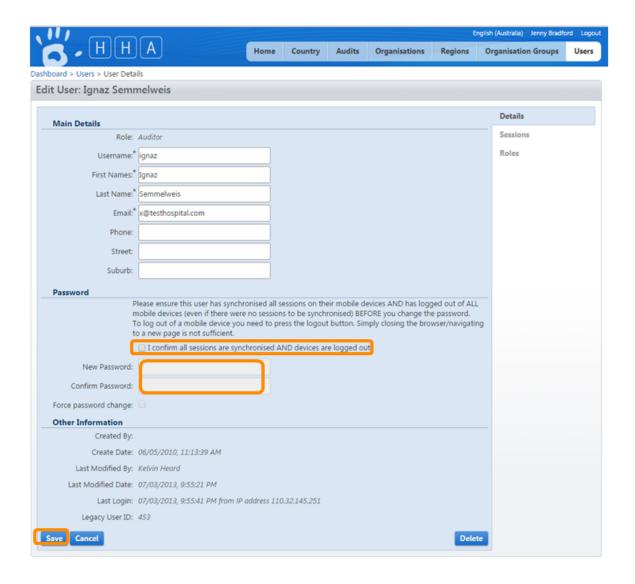
This is usually due to the fact that your email address (entered when username was created) is incorrect. Please contact the Hand Hygiene Coordinator (Compliance 'Organisation Administrator') at your facility who can reset usernames and/or passwords as follows:

- 1. Log into Compliance Database as the Organisation Administrator
- 2. Click on Users in the top level menu
- 3. Search for the user they want to edit by completing one of the search fields
- 4. Select the required user from the blue table below by clicking on their Username.



Confirm all sessions are synchronised AND all devices are logged out, enter and confirm the new password and click Save.



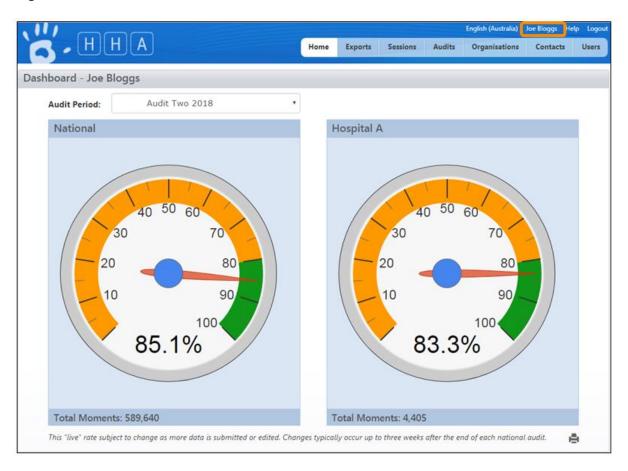


# How do I update my details or change my password?

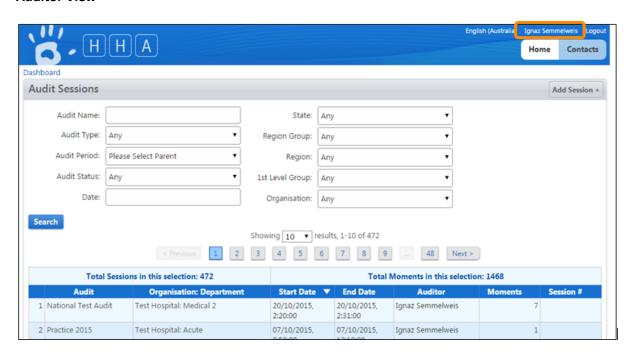
Ensure ALL sessions are synchronised and you are logged out of ALL mobile devices as per instructions above. Login to Compliance Database on a computer as usual and click on your username at the top right of the page.



## **Organisation Administrator View**

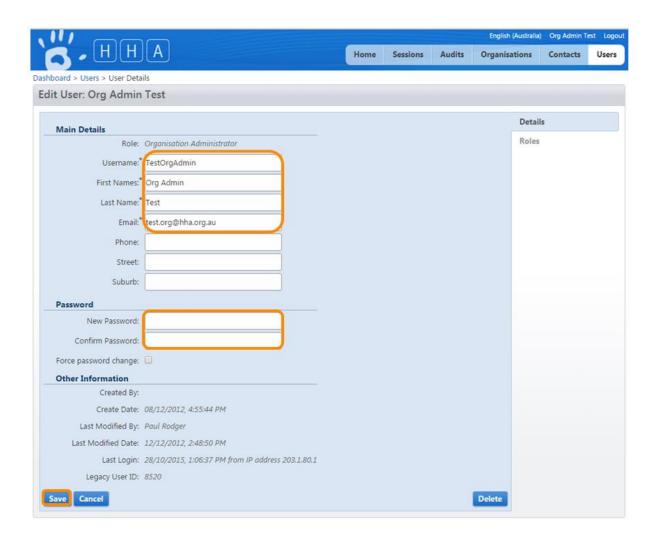


## **Auditor View**



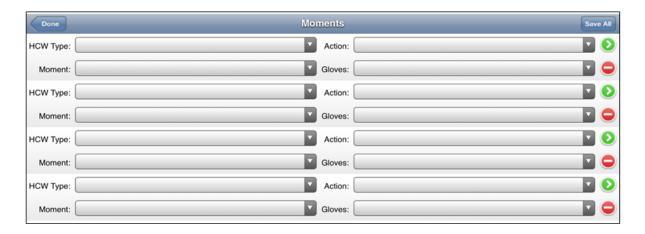
This will take you to the screen below where you can update your details and change your password. Then click Save at the bottom left of the page.





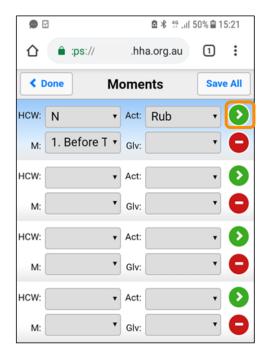
# Can I only enter four moments per session?

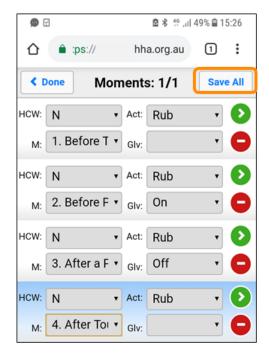
A maximum of four moments can be observed and audited on the screen at once however each session can consist of an unlimited number of Moments.



When complete each Moment can be saved individually by clicking the green arrow beside it:







Alternatively all four Moments can be saved at once by clicking on Save All on the right of the grey Moments bar at the top:

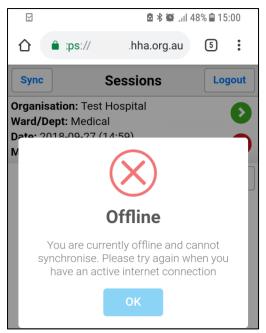
Each time a Moment / Moments are saved new blank Moment / Moments will appear on the screen. Continue with this process until the Session is complete.

# Why can't I Sync my data?

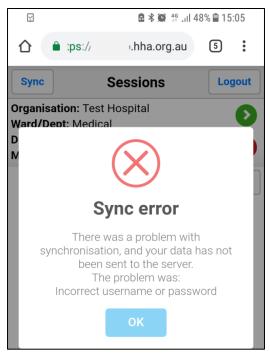
There are a couple of reasons why completed session/sessions can't be synchronised.

A) There is no active internet connection: Try again when you have an active internet connection





B) User password has been changed whilst the user is still logged into Compliance Mobile.



This data can't be synchronised with the server and must be entered into Compliance Database manually. In this situation, it is crucial that the steps below be followed so that subsequently collected data can be synchronised:

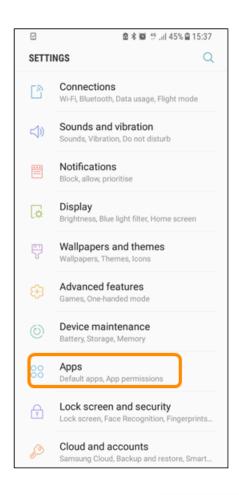
- 1. Enter the data manually
- 2. Delete the session from the mobile device by clicking on the red minus sign beside the session and confirm OK you are sure you want to delete this session?

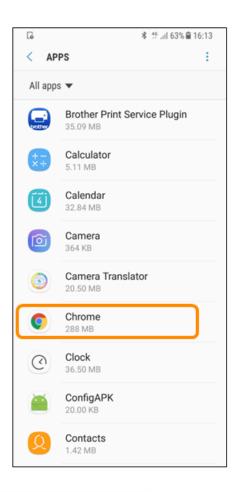


- 3. Log off the mobile device by using the Logout button (not just by closing the internet browser) and ensure all pages of the internet browser are closed
- 4. Remove the Compliance Mobile icon from the home screen by pressing it, then dragging to 'X Remove' at the top of the page and releasing
- 5. Then go to Home Screen, swipe up or down to display all Apps, then select Settings, Apps, Browser (Chrome if that is what you are using), Storage, Clear Cache

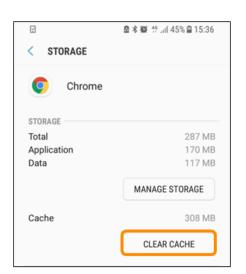










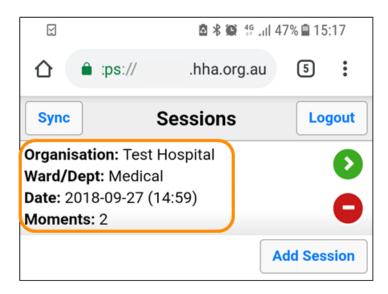




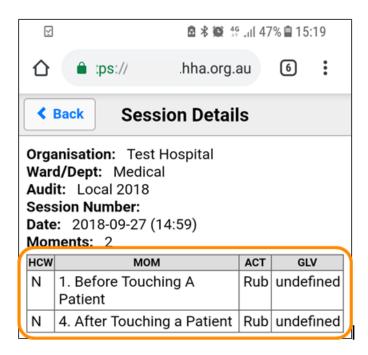
Log in and test all is working correctly by entering and syncing one moment only. If necessary delete this Moment and Session from Compliance Database using the computer.

# How do I manually enter data that can't be synchronised into the Compliance Database?

Click on summary details of session and all audited moments will appear below



Enter Moments into Compliance Database manually before deleting session from mobile device





# **Troubleshooting - Mobile Devices - Apple**

For users with role: Auditor

Android Devices only - based on Apple iPhone 6

#### **Contents**

What are the benefits of using Compliance Mobile?

What is the difference between the Compliance Database and Compliance Mobile?

How can I quickly access Compliance Mobile?

How much of my data plan will I use if I collect moments on my personal device?

What if I can login to the Compliance Database on the computer but not Compliance mobile?

How do I reset my password if I have forgotten it?

What if the 'Forgot Password' function doesn't work? How do I update my details or change my password?

Can I only enter four moments per session?

Why can't I Sync my data?

How do I manually enter data that can't be synchronised into the Compliance Database?

# What are the benefits of using Compliance Mobile?

Compliance Mobile is a 'paper free' method for auditors to 'sync' moments directly into the national database. There are three main reasons to use Compliance Mobile:

- 4. Save time: Facilities using Compliance Mobile report a 50% reduction in data management time.
- 5. Data validation: data quality is optimised because of real-time application of validation rules
- 6. Immediate performance feedback: once the session is synced, it is available for immediate feedback to healthcare workers by using the Compliance website reporting tools.

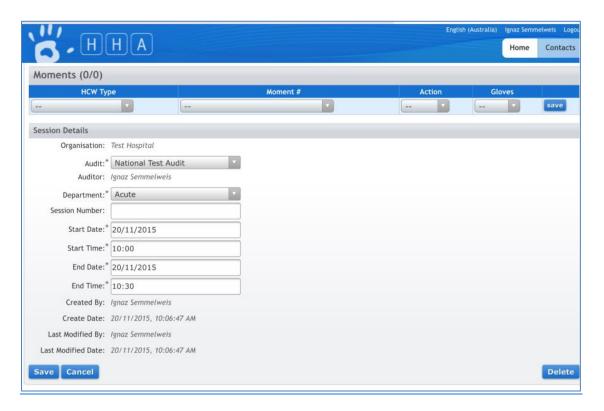


# What is the difference between the Compliance Database and Compliance Mobile?

The Compliance Database (<a href="https://compliance.hha.org.au">https://compliance.hha.org.au</a> and Compliance Mobile (<a href="https://compliance.hha.org.au/mobile">https://compliance.hha.org.au/mobile</a>) are two separate sites. Compliance Mobile allows entry and syncing of data only. All other functions such as adding audits, adding auditors, resetting passwords, adding departments, submitting completed audits and generating reports must be done on the Compliance Database. Data can only be entered one moment at a time on the Compliance Database but with Compliance Mobile four moments can be observed and audited simultaneously (note that whichever method is used, an unlimited number of moments can be added to each session).

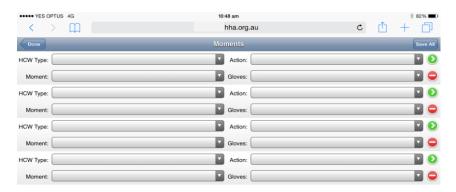
Note the different screenshots when entering data in either Compliance Database or Compliance Mobile.

Compliance Database data entry screen





## Compliance Mobile data entry screen



# How can I quickly access Compliance Mobile?

This can be done by adding a link to the home screen. Go to hha.org.au

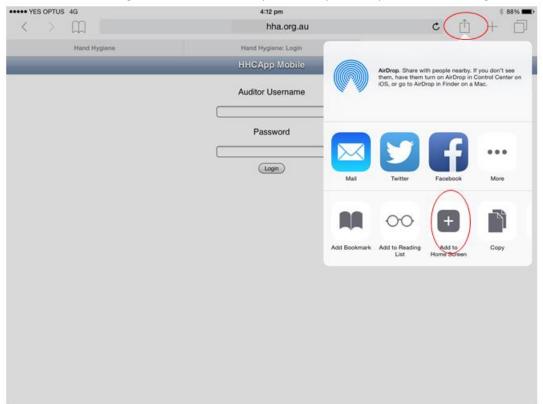
Scroll down to the blue buttons and click on Compliance Mobile



Or go to <a href="https://compliance.hha.org.au/mobile">https://compliance.hha.org.au/mobile</a>



Click on then select Add to Home Screen. The icon will appear and remain on your home screen. Clicking on this icon will take you directly to Compliance Mobile Login.



The icon will appear and remain on your home screen. Clicking on this icon will take you directly to Compliance Mobile Login.

# How much of my data plan will I use if I collect moments on my personal device?

Auditing using a mobile device will result in minimal data usage on your plan.

Syncing 100 moments = 650 bytes

Most data plans are in gigabytes

1GB = 1 billion bytes

# What if I can login to the Compliance Database on the computer but not Compliance Mobile?

If you can login to Compliance Database on the computer but not on Compliance Mobile then your username and password are correct. If this is the case try using a different internet browser e.g. Chrome.

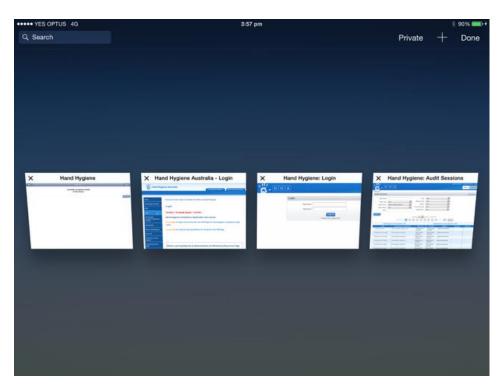


# How do I reset my password if I have forgotten it?

Prior to resetting your password it is important to ensure any previously collected sessions have been synchronised and you are logged out of Compliance Mobile on all devices you have ever previously been logged into by clicking on the Logout button. Simply closing the screen does not log you out.



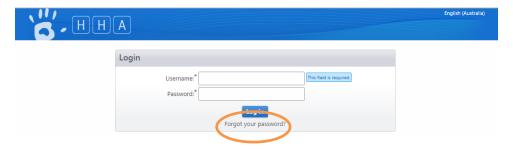
To check you are logged out of all screens click the box with the number in the top right corner of the page and all open pages will appear (see below).



If still logged in tap the page to open it and then click on Logout. If already logged out click on the cross in the top left hand corner to close the page.

Then go to the Compliance Database website at <a href="https://compliance.hha.org.au">https://compliance.hha.org.au</a> and click on Forgot your password? You will be asked to enter your email address and a new password will be emailed to you.





# What if the 'Forgot Password' function doesn't work?

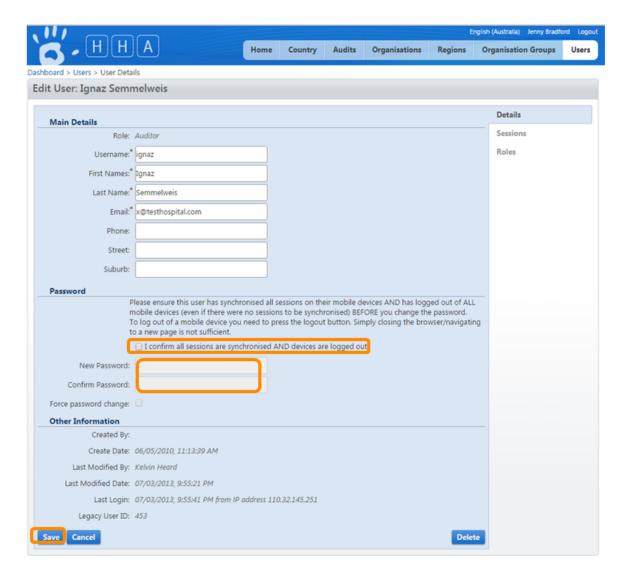
This is usually due to the fact that your email address (entered when username was created) is incorrect. Please contact the Hand Hygiene Coordinator (Compliance Database Organisation Administrator) at your facility who can reset usernames and/or passwords as follows:

- 5. Log into Compliance Database as the Organisation Administrator
- 6. Click on Users in the top level menu
- 7. Search for the user they want to edit by completing one of the search fields
- 8. Select the required user from the blue table below by clicking on their Username.



Confirm all sessions are synchronised AND all devices are logged out, enter and confirm the new password and click Save.



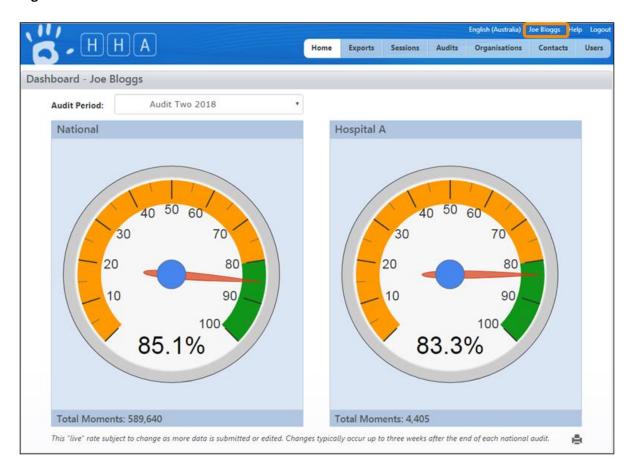


# How do I update my details or change my password?

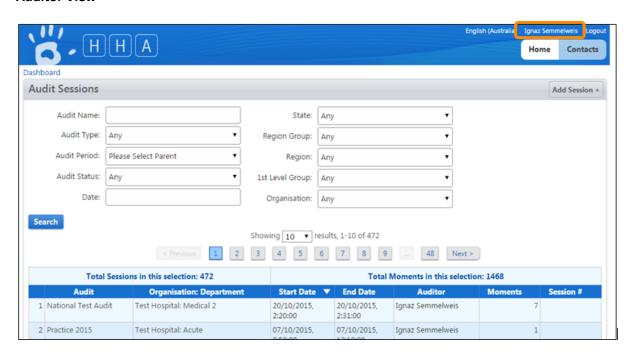
Ensure ALL sessions are synchronised and you are logged out of ALL mobile devices as per instructions above. Login to Compliance Database on a computer as usual and click on your username at the top right of the page.



## **Organisation Administrator View**

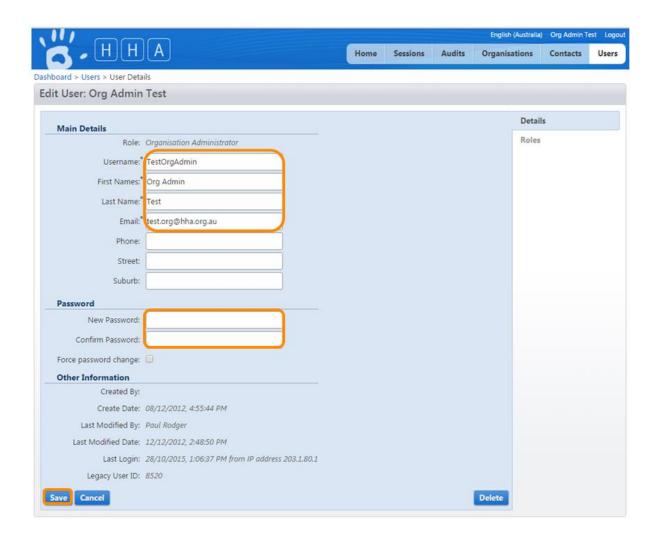


## **Auditor View**



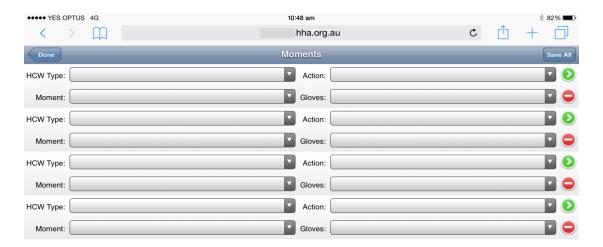
This will take you to the screen below where you can update your details and change your password. Then click Save at the bottom left of the page.





# Can I only enter four moments per session?

A maximum of four moments can be observed and audited on the screen at once however each session can consist of an unlimited number of Moments.

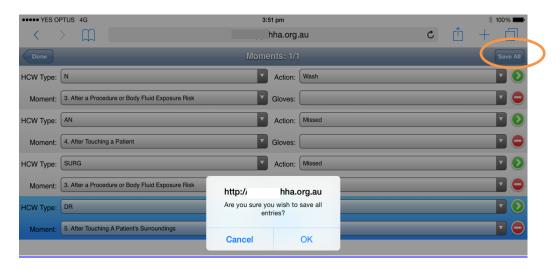




When complete each Moment can be saved individually by clicking the green arrow beside it:



Alternatively all four Moments can be saved at once by clicking on Save All on the right of the grey Moments bar at the top:



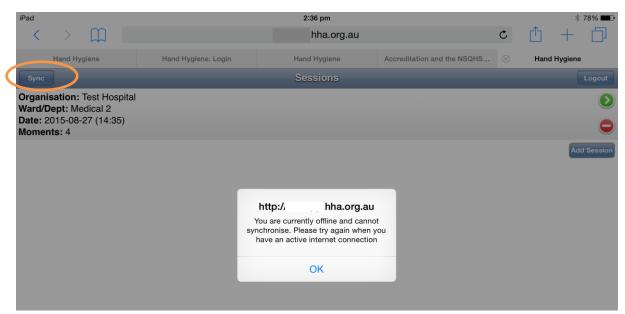
Each time a Moment / Moments are saved new blank Moment / Moments will appear on the screen. Continue with this process until the Session is complete.

# Why can't I sync my data?

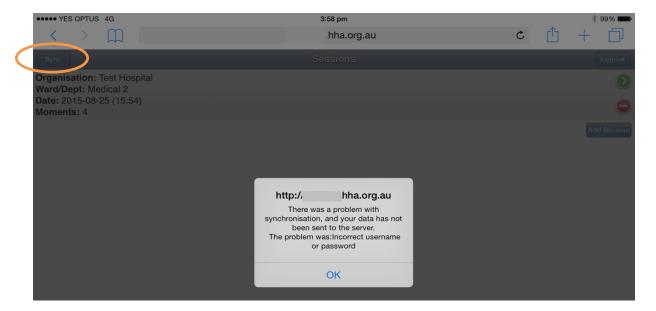
There are a couple of reasons why completed session/sessions can't be synchronised.

**A)** There is no active internet connection: Try again when you have an active internet connection





**B)** User password has been changed whilst the user is still logged into Compliance mobile.

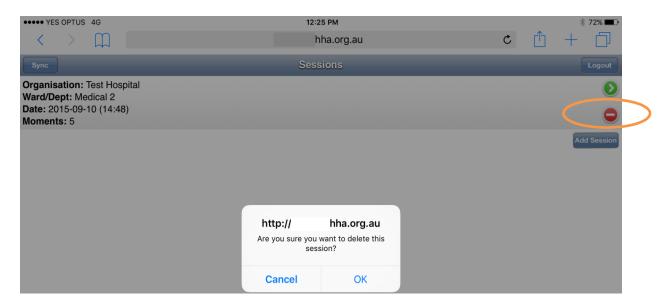


This data can't be synchronised with the server and must be entered into Compliance Database manually.

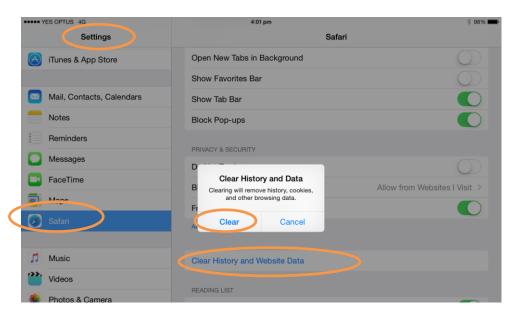
In this situation, it is crucial that the steps below be followed so that subsequently collected data can be synchronised:

- 1. Enter the data manually
- 2. Delete the session from the iPad by clicking on the red minus sign beside the session and confirm OK you are sure you want to delete this session?





- 3. Log off the iPad by using the Logout button (not just by closing the internet browser) and ensure all pages of the internet browser are closed.
- 4. Remove the Compliance Mobile icon from the home screen by pressing on it until it "wiggles" then click on the cross in the top left hand corner.
- 5. Then go to Settings/Safari/Clear History and Website Data/Clear



Log in and test all is working correctly by entering and syncing one moment only. If necessary delete this Moment and Session from Compliance mobile using the computer.



# How do I manually enter data that can't be synchronised into the

## **Compliance Database?**

Click on summary details of session and all audited moments will appear below



Enter Moments into Compliance Database manually before deleting session from iPad





# **Quick Start Compliance Database Guide**

For users with role: Administrator - Organisation

**Organisation Group** 

**Region Group** 

Region

**Auditors** 

#### **Contents**

## 1. Quick Start Guide for Organisation Administrators

- 1.1 Add new Auditor
- 1.2 Add existing user to Auditor role
- 1.3 Detach Auditor
- 1.4 Add new Organisation Administrator
- 1.5 Add existing user to Organisation Administrator role
- 1.6 Detach Organisation Administrator
- 1.7 Add new Reporter or Data Entry role
- 1.8 Add existing user to Reporter or Data Entry role
- 1.9 Assign a Primary Contact
- 1.10 Add new Department
- 1.11 Add new Health Care Worker Type
- 1.12 Update User details
- 1.13 Download User list
- 1.14 Auditor and Sessions report
- 1.15 Enter data
- 1.16 Delete data
- 1.17 Add National Audit Period
- 1.18 Add Local Audit Period
- 1.19 Submit Audit Period
- 1.20 Edit Session Details

### 2. Quick Start Guide for Region Administrators

- 2.1 Add new Region Administrators
- 2.2 Add existing user to Region Administrator role
- 2.3 Detach Region Administrators
- 2.4 Delete data

## 3. Quick Start Guide for Auditors

3.1 Update details



- 3.2 Enter data (Compliance Database)
- 3.3 Enter data (Compliance Mobile)

## 1. Quick Start Guide for Organisation Administrators

#### 1.1 Add new Auditor

- > Users tab (horizontal menu, top of page)
- >Add User+
- >Enter details
- >Save
- >Assign Roles
- >Select Role
- >Select level (region, organisation, department)
- >Assign Role

## 1.2 Add existing user to Auditor role

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Users tab (vertical menu, right side of page)
- >Dropdown arrow for Auditors
- >Add New+
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Done

### 1.3 Detach Auditor

### Method 1

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Users tab (vertical menu, right side of page)
- >Auditors dropdown arrow
- >Edit List
- >Select red circle beside auditor name
- >Save

## Method 2

- >Users tab (horizontal menu, top of page)
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Roles
- >Check box



#### >Remove Selected

## 1.4 Add new Organisation Administrator

- > Users tab (horizontal menu, top of page)
- >Add User+
- >Enter details
- >Save
- >Assign Roles
- >Select Role: Organisation Administrator
- >Select organisation
- >Assign Role

## 1.5 Add existing user to Organisation Administrator role

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Users tab (vertical menu, right side of page)
- >Dropdown arrow for Organisation Administrators
- >Add New+
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Done

## 1.6 Detach Organisation Administrator

Method 1

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Users tab (vertical menu, right side of page)
- >Edit List
- >Select red circle beside auditor name
- >Save

### Method 2

- >Users tab (horizontal menu, top of page)
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Roles
- >Check box
- >Remove Selected

## 1.7 Add new Reporter or Data Entry role

- > Users tab (horizontal menu, top of page)
- >Add User+



- >Enter details
- >Save
- >Assign Roles
- >Select Role: Reporter or Data Entry
- >Select organisation
- >Assign Role

## 1.8 Add existing user to Reporters or Data Entry role

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Departments tab (vertical menu, right side of page)
- >Select Department
- >Add New+
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Done

## 1.9 Assign a Primary Contact

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Users tab (vertical menu, right side of page)
- >Edit List (in line with Organisation Administrator list)
- >Select blue star
- >Save

## 1.10 Add new Department

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- > Departments tab (vertical menu, right side of page)
- > Add Department+
- > Enter department details
- >Save

## 1.11 Add new Health Care Worker Type

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- >HCW Types
- >Add HCW Type+
- >Enter HCW Type details
- >Select Parent HCW Type
- >Save



## 1.12 Update User details

- > Users tab (horizontal menu, top of page)
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Update user details
- >Save

#### 1.13 Download User list

- > Users tab (horizontal menu, top of page)
- >Select Organisation and Role
- >Search
- >Download as: XLS, XLSX, CSV

## 1.14 Auditor and Sessions report

- >Home tab (horizontal menu, top of page)
- >Auditor and Sessions report
- >Select Organisation
- >Select date range or audit period
- >Run report
- >Download PDF or spreadsheet
- >Print (landscape)
- >Exports tab PDF available for 7 days

## 1.15 Enter data

- >Sessions tab (horizontal menu, top of page)
- >Add Session+
- >Enter session demographics
- >Save
- >Enter Moment
- >Save

#### 1.16 Delete data

- >Sessions tab (horizontal menu, top of page)
- >Select organisation under the blue line
- >Audit Periods tab
- >Enter session demographics
- >Save
- >Enter Moment
- >Save

## 1.17 Add National Audit Period

- >Audits tab (horizontal menu, top of page)
- >Add Audit+



- >Audit Type National
- >Select organisation and Audit Period

>Save

#### 1.18 Add Local Audit Period

- >Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- >Audit Periods tab (vertical menu, right side of page)
- >Add Audit Period+
- >Enter details
- >Save
- >Audits tab (vertical menu, right side of page)
- >Add Audit+
- >Audit Type Local
- >Audit Period
- >Save

#### 1.19 Submit Audit Period

- >Audits tab (horizontal menu, top of page)
- >Select Audit (under the blue line)
- >Submit or Approval

#### 1.20 Edit Session Details

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- >Sessions
- >Enter Audit details in search fields
- >Search
- >Select session under the blue line
- >Scroll down to session details
- >Edit details (Audit must be 'Active' to edit)
- >Save

#### 2. Quick Start Guide for Region Administrators

## 2.1 Add new Region Administrators

- > Users tab (horizontal menu, top of page)
- >Add User+
- >Enter details
- >Save
- >Assign Roles
- >Select Role: Region Administrator
- >Select region
- >Assign Role



## 2.2 Add existing user to Region Administrator role

- > Regions tab (horizontal menu, top of page)
- > Select region under blue line
- >Dependants
- >Add New+
- >Enter user details in search fields
- >Search
- >Select user under the blue line
- >Done

### 2.3 Detach Region Administrators

#### Method 1

- > Regions tab (horizontal menu, top of page)
- > Select region under blue line
- >Dependants
- >Edit List
- >Select red circle beside Region Administrator's name
- >Save

#### Method 2

- >Users tab (horizontal menu, top of page)
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Roles
- >Check box
- >Remove Selected

### 2.4 Delete data

- >Audits tab (horizontal menu, top of page)
- >Filter for Audit Period and Organisation
- >Search
- >Select Audit Period under the blue line
- >Select Session
- >Edit and Del to remove each Moment
- >Delete (bottom right of page)

#### 3. Quick Start Compliance Database Guide for Auditors

## 3.1 Update details

- >Select own name (top right side of page)
- > Update details
- > Save



# 3.2 Enter data (Compliance Database)

- >Home tab (horizontal menu, top of page)
- >Add Session+
- >Enter session demographics
- >Save
- >Enter Moment
- >Save

# 3.3 Enter data (Compliance Mobile)

- >Login to mobile site on mobile device
- >Add session
- >Enter session demographics
- >Moments
- >Enter Moment
- >Save All
- >Save All? Yes
- >Done
- >Finished? Yes
- >Sync
- >Sync All? Yes
- >Logout
- >Logout? Yes