Module 1
Using the Excel Sheet

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Using the Excel Sheet

The Excel Reporting Form is the first point of data entry into the computer. Data which has been gathered in paper-based forms within each technical section (see Part 2 of the Manual) should now be entered into corresponding tables in the Excel form.

The most recent version of the Excel sheet is installed with the HIS database and can also be downloaded from the website **www.unhcr.org/his**

1.1   The first time you start

When you first open the Excel Reporting Form you may see the red warning bar below. This is prompting you to change the security settings in Excel to enable the sheet to work properly. For more help on how to change your security settings see the Troubleshooting Guide at the end of this section.

> Please enable macros to adjust the Basic Configuration and General Information sections

When the security settings are correctly configured and the sheet is working properly, the red bar will disappear and you will see the HIS Menu appear at the top of the screen.

HIS
Show/Hide Page Header
Show/Hide Options Tab
Reset to ▶
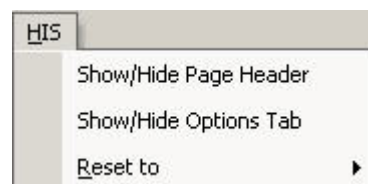
1.2   Basic options

The Excel sheet plays an extremely important role in defining how data is managed within the HIS. The most important data management options are found within the Basic configuration section found on Sheet 1.0 (see screenshot opposite).

Legend

Basic Configuration:

Use the drop-down menus to define the following options:
   1. Reporting frequency (monthly or weekly)
   2. Reporting level (camp or facility-based)
   3. Language (English or French)

In the Basic configuration section, users should carefully define the following:

> Reporting Frequency

Select Monthly or Weekly reporting. If weekly is selected, an additional drop-down menu will appear to allow the week number to be entered. This corresponds to the week number within the HIS Reporting Calendar. When imported into the database, the computer will automatically build monthly reports composed of 4 or 5 weeks depending on the reporting calendar.

> Reporting Level

Select Camp or Facility-based reporting. If facility-based reporting is selected, an additional drop-down menu will appear to allow the name of each health facility within a camp to be selected. When imported into the database, the computer will automatically build a camp-level report based on the number of health facilities that are associated with it. Before being activated in the Excel Reporting Form, this feature must first be enabled and configured inside the database.

> Language

Select English or French.

After the basic configuration options have been set, they can be toggled on and off in the Excel Reporting Form using the Show/Hide Page Header button in the HIS Menu.

> Country Considerations

How is the HIS configured?

The basic and advanced configuration options within the Excel Reporting Form are extremely important. They enable users to take decisions on how frequently data will be reported within the HIS (weekly or monthly) and also at what level (facility or camp). They also determine the types of data that are collected and allow users to customise HIS according to the exact needs and requirements of each health programme.

The ability to choose weekly and facility-based reporting has a number of benefits. The most important are:

1. Eliminates the need to manually add weeks into months, or health facilities into camps, prior to data entry;

2. Allows users to analyse weekly and/or facility-based trends in the data rather than only at a monthly and/or camp level (this is particularly useful in outbreak alert and response); and

3. Provides more regular feedback to users and permits corrections to be made at more frequent intervals, therefore helping to improve data quality.

If a partner decides to move to weekly and/or facility-based reporting then this does not affect how data is collected and reported at field level. The same guidance applies as is given in Part 2 of this manual. Paper-based reports should continue to be completed by each health facility each week according to the reporting calendar.

The main change that is required is for paper-based reports to be entered more regularly into the Excel Reporting Form. For this reason, it is recommended that the shift to weekly and/or facility-based reporting is made only when users are confident that paper-based reports are being received on time and are good quality. It should also only be undertaken if programmes have sufficient resources to enter the data at the more regular intervals.

 After weekly and/or facility-based data has been entered into the Excel Reporting Form, the remaining process of building monthly and/or camp reports will be undertaken automatically by the database. The database will recognise when either:

•   4 or 5 weekly reports have been imported together (the exact number of weeks in a month is determined by the reporting calendar); and/or

•   the correct number of health facilities associated with the camp have been imported together (the exact number of facilities within each camp is determined by the options form in the database)

When the above conditions are met the database will automatically combine the reports to create monthly and/or camp-based reports. More information on how to import and analyse data within the HIS Database is given in Part 2 of this module: Using the Database.

1.3   Advanced options

The Advanced Options sheet within the Excel Reporting Form allows the HIS to be configured to the specific needs and requirements of each partner. This is important for system flexibility and plays a key role in defining the types of data that will be collected within the HIS.

The Advanced Options sheet can be toggled on and off using the Show/Hide Options button in the HIS Menu. There are four key sections as described below.

> Section A: Report Options
Use the buttons in this section to configure the report according to the types of services offered by each partner.

> Section B: Report Setup

Use this section to select your country from the list. The organisation and camp names associated with that country will automatically appear in the lists opposite. They will also be available for selection from the drop-down menus in Sheet 1.0 (see 1.4 How to Enter Data).

Use this section to select your country from the list. The organisation and camp names associated with that country will automatically appear in the lists opposite. The names and dates of reporting of each location can be configured within the HIS database. For more information on how to do this please write to HQHIS@unhcr.org.

If *facility-mode* is enabled, the health facilities names will automatically appear in the optional reporting tables.

Each facility name that is entered must be associated with a location/camp. These will then define how the facilities are grouped together in the database.

Tip: The Options tab is intended for use at Country-level only and the configuration should be reviewed periodically (every 3-6 months) in coordination with all partners. Users at field-level should not regularly access and alter settings in this sheet.

> Section C: User Defined Fields

All the user-defined fields (UDFs) in the HIS can be configured in this section. Use the pull-down menus to select the desired names within each reporting section.

Use the pull-down menus to select the names of the user-defined fields (UDFs) for each section.

A more advanced UDF list is available if you press the Advanced List button.

If you wish to report a UDF which is not yet available in the list, please write and let us know at HQHIS@unhcr.org

> Section D: Beneficiary type

The same principles for collecting and reporting data in refugee settings can also be applied to other settings (e.g. within IDP and emergency programmes). For this reason, the default beneficiary-types of "Refugee" and "National" can be replaced by alternative terms as required.

Use the pull-down menus to select the names of beneficiary-types which are most appropriate for the setting.

The available options are:
> Refugee / IDP / Returnee / Emergency-affected.
> National / Host

1.4   How to enter data

After the basic and advanced options have been configured to meet the needs of each health programme, the Excel Reporting Form is ready for data entry direct from the paper-based report forms.

Before any data is entered, the first step is to define the exact report that is being entered using the drop-down menus in Section 1.1 General Information.

1. Use the pull-down menus to select the reporting location and name of organisation.

These are defined by the name of the Country that is selected in Section B of the Advanced Options sheet.

The name of the Health Coordinator should be typed in manually.

2. Depending on the options chosen in Basic confirmation, additional pull-down menus will appear to allow the reporting week and/or health facility to be selected.

It is extremely important that the organisation and camp/health facility names are selected only from the pull-down lists. They must not be typed manually. This is a common reason why Excel Reporting Forms fail to import properly into the HIS Database.

After the general report information has been added, the next step is to navigate through the different sections of the Excel Reporting Form and enter the data using the corresponding paper-based report forms.

Legend

White Box:	Enter Data
Grey Box:	Total
Orange Box:	Indicator

This worksheet is locked to preserve the formulas that calculate your results. To unlock the worksheet, go to the Tools menu, select Protection, then choose Unprotect Sheet. This sheet does not use a password.

Health Information System | Select Country | Monthly Camp | English | v 1.6.02

Basic configuration: Select Country

Reporting frequency	Reporting level	Language
Monthly	Camp	English

1.1 General Information

Location/Camp:	Select Location
Organisation:	Select Name
Health Coordinator:	

Current Month:	Select Month
Current Year:	Select Year

What is the source of population data? proGres (default)

1.2 Population

Age	Male	Female	Total	% estimate
a. Total Population			0	
b. Number of live births			0	
c. Number of infants < 1 year			0	
d. Number of children < 5 years			0	
e. Number of females 15 - 49 years		0		20 %
f. Number of preg and lact women		0		4 %

Percentages shown are default estimates only. Enter your own percentage value into the pink cells if required.

1.0 Population | 2.0 Mortality | 3.0 Morbidity | 4.0 IPD & Referral | 5.0 Laboratory | 6.0 Disease Control | 7.0 EPI and Vit. A | 8.0 Nutrition | 9.0 Reprod. Health | 10.0 HIV-AIDS

3. Use the tabs on the bottom of the sheet to navigate between the different reporting sections within the HIS. These are described in detail in Part 2 of this manual.

2.0 Mortality

2.1

3.0 Morbidity

3.1 Co

4.0 In-patient Department and Referral

4.1 In-

5.0 Laboratory

5.1a Malaria (microscopy)

Number of malaria slides examined	
Number of malaria slides positive	

Malaria Indicator
a. Malaria slide positivity rate

3.2 Mo

4. Match the tables in the Excel Reporting Form with the corresponding paper-based forms and enter the data (into the white cells).

The totals (grey cells) and indicators (orange cells) will automatically be calcuated by the computer.