social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

DEVELOPMENT OF AN ELECTRONIC MONITORING &EVALUATION SYSTEM

Data Capturer
User Manual

DATAWORLD
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Version 0.2

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Document Change Control

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Document Abbreviations

Abbreviation	Description
CFO	Chief Financial Officer
DSD	Department Of Social Development
GIS	Geographical Information System
HCBC	Home and Community Based-Care
HOD	Head Of Department
HR	Human Resources
M&E	Monitoring and Evaluation
NPO	Non-Profit Organization
SASSA	South African Social Security Agency

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Definitions

Key Word	Definition
Data Capturer	A person who is responsible for inputting information from different sources into the system
Data Verifier	A person who is involved in the process of checking for accuracy and inconsistencies after data has been captured on the system
Facility	Also known as NPO, are buildings, structures or facilities funded by the government meant to facilitate the provision of social services through the development of primary and social amenities. Examples of facilities include residential facilities for older persons, persons living with disabilities, abused victims of abuse, substanc abuse treatment centres, support to families and youth training facilities.
Facility/NPO Manager	Facilities managers are responsible for the security, maintenance and services provided by the NPO to ensure that they meet the needs of the organization, beneficiaries, and its employees.
Indicator	Performance indicator is a quantitative metric that provides information to monitor performance, measure achievement and determine accountability.
NPO	Non-Profit Organisation is a trust, company or other association of persons established for a public purpose, and the income and property of which are not distributable to its members or office bearers accept as reasonable compensation for services rendered.
Programme	Social programs administered by different branches or units within the department such as programme responsible for providing social protection services, care and services to older persons, services to persons with disabilities etc.
Service Point	Service point is the point of demarcation between the facility (NPO) by implementation of assistance and support programmes through which social programs are delivered to beneficiaries by social services practitioners
Service Point Manager	Service point managers are responsible for the security,

Key Word	Definition
	maintenance and services provided by the service point to ensure that they meet the needs of the organization, beneficiaries, and its employees.
Service Point Manager Data Capturer	A person who is responsible for inputting information at the service point into the system
Sub-Programme	A programme is a smaller programme making up part of the larger main programme. Social Welfare is the main programme providing welfare services, care and support to older persons is a sub-programme with specific focus and activities.

Facilities

Facility Type	Definition
CNDC	Poverty alleviation projects mainly aimed at addressing issues of hunger and poverty especially in deep rural areas. DSD supports these initiatives by ensuring food security and that communities are able to generate reasonable income and ways of sustaining themselves and their families through the supported CNDCs.
CYCC	The Children's Act (38 of 2005) ensures that youth and children that are orphaned, living on the streets, in conflict with the law, or are not safe at home or in their communities can be placed in alternative care. A CYCC is a facility that provides a form of alternative care for children outside of the family environment.
Child Care & Family Protection (CPO)	Social Development's Child Care and Family Protection Programme aims to safeguard and promote child well-being and build resilience of families and communities to care for and protect their children. These include placing children in foster homes, accessing shelters for families.
Community Care Center (CCC)	Community Care Centers provide psychosocial care and

Facility Type	Definition
	support services and skills development to orphans and vulnerable children, including child-headed households and youth. The goal of CCC's is to enhance the quality of services that are available to orphans and vulnerable children within their communities of origin. This approach also complements existing child-protection interventions and services such as Home Community-Based Care, drop-in centres, Isibindi, childcare forums and early childhood development.
Community Based Center	Community-based centers can meet the needs of young children and their families or caregivers by providing comprehensive, child-friendly services (e.g., education, nutrition, health, HIV care and treatment, and water and sanitation) through a central location.
Community Development Project	The aim of community development project is to eradicate poverty by improving social, environmental and economic situations of rural communities.
Day-Care Centre for Children with Disabilities	Provides a set of services to children with special needs to promote children's development, ensure comprehensive care for them during the day, meet their learning needs, provide motor and speech therapy, organize their free time, among others.
Drop-In center	Drop-in centres are facilities or community-based initiatives aimed at addressing the physical, emotional, psychological and social developmental needs of vulnerable children within their communities and closer to their homes. Drop-in centres provide basic services such as food, clothing, school support and hygiene, as well as optional services such as counselling, guidance, life skills development and educational and recreational programmes.
HCBC Organisation	HCBC is the provision of comprehensive services, including health and social services, by formal and informal caregivers in the home in order to promote, restore and maintain a person's maximum level of

Facility Type	Definition
	comfort, function and health, including care towards a dignified death. The objective of the programme is to reduce the psycho-social impact of HIV and AIDS on the infected and affected individuals and families
Homeless Shelter	Homeless shelters are a type of homeless service agency and facilities which provide temporary residence for homeless individuals and families.
Hospice	A healthcare facility for older persons who are terminally ill or near the end of life that emphasizes pain control and emotional support for the patient and family.
Independent living facility for persons with disabilities	Facilities that have been specifically developed to accommodate and care for persons with disabilities, these differ slightly and may be referred to as: "Self Help Centres", "Homes of Safety", "Quad Homes" or "Group Homes". These "Homes" are private residence for persons with chronic disabilities who cannot live with their families or on their own due to their disability and the assistance they require, they cater for young adults, adults and seniors.
Luncheon Club (Service Center)	Social welfare programmes responsible for serving hot midday meals to a society or group of older persons who meet regularly for an organized lunch.
Outreach Preventative	The Outreach Prevention Program provides intensive in-home counseling, case management, and is based on the evidenced based practiced of Targeted Case Management. Structured interventions which promote life skills development, parenting skills, children's academic success, family unification, and stabilization of mental health symptoms.
Partial Care Facility	Partial care facility is the care of more than six children on behalf of their parents or caregivers for a temporary period during the day and could include overnight 'care.
Partial Care Facility (Special Day-Care-Centre for Children with	Partial care is the care of children with disabilities or chronic illnesses on behalf of their parents or caregivers

Facility Type	Definition
Disabilities)	for a temporary period during the day and could include overnight 'care.
Protective Workshop	Protective workshops are safe, disability-friendly environments providing opportunities for people with disabilities to develop the skills and abilities of these persons and to provide the necessary support which will allow them to find suitable employment or other forms of income generation.
Residential facility for older persons	Facilities providing community-based care and support services. Service centres give older persons the opportunity to engage in activities and services such as exercise, recreational activities, cultural and spiritual activities, awareness campaigns, educational and skills activities, and lunches.
Residential facility for persons with disabilities	Licensed care centres or assisted living facilities day care programmes focusing on the care and development of persons with disability.
Secure Care Center	A residential facility and/or programme of intervention which ensures the appropriate physical, behavioural and emotional containment of young people while providing an environment, milieu, and programme conducive to their care, safety, and healthy development.
Social Crime Prevention	The programme provides services to all persons at risk and in conflict with the law, ensuring social protection and contributing to a safer society, in support of law enforcement and crime combating initiatives.
Substance Abuse Prevention Programme	Early intervention school and family-based programs aimed to promote abstinence from alcohol and illicit drugs and the misuse of over-the-counter drugs
Substance use Disorder (SUD) inpatient treatment center	Offers 24-hour low to high-intensity treatment for both adults and adolescents in a residential setting like a rehabilitation centre.
Substance use Disorder (SUD) outpatient treatment center	The regularly scheduled sessions take place at a nonresidential treatment center administered by an addiction professional or trained clinician providing

Facility Type	Definition
	medication treatment, group and individual abstinence, counseling, relapse prevention programming, drug, and alcohol education.
Victim Empowerment Service Center	Victim empowerment service centers offers the services of both trauma debriefers, who engage with victims at the time of the incident, as well as trauma counsellors, who are available to counsel victims after the event.
Youth Development Centre	Youth development centre targets young persons between the ages 14 – 35 by providing support, services, and funding to youth organisations to implement youth services and programmes.

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1. Introduction

The electronic Monitoring and Evaluation system is designed to assist the Social Development department in monitoring its national and provincial indicators and easing the data collection process.

Following are the M&E system Objectives:

- Incorporate existing data and indicators.
- Incorporate the M&E Framework in designing a robust and access control-based system.
- Integrate with other systems to get real time data on indicators.
- Facilitate Realtime data collection through the usage of mobile devices.
- Implement a system with role-based authority and secure authentication to allow the implementation of proper security and protection of the privacy and integrity of confidential information. It will allow multi-party simultaneous access to case records while protecting the integrity of the information.
- Retain and show audit trail for each process step and action taken.

2. Summary

This document details the operations of the implemented data capturing modules into the M&E System, and the modules are listed below:

- Module 1: Access control – the module is created for the system to manage users.
- Module 2: Data Capturing – this module is required for capturing and submission of data on the system.

3. Access Control

This system is web based and can be accessed through a machine connected to the internet using the credentials provided by the system. Users are sent login details after account approval from the administrator.

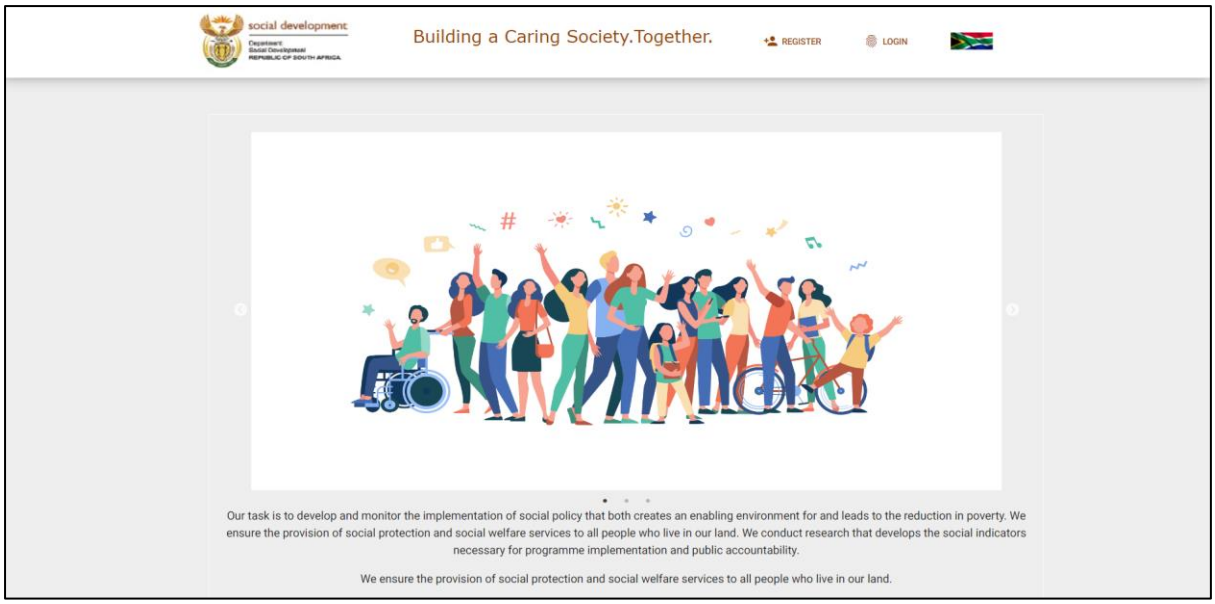
Note: The system can also be accessed offline.

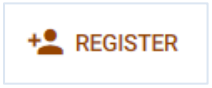
This section will detail how the user can access the system and navigate to the desired part of the system.

- Open an internet browser i.e., Internet Explorer, Firefox, or Google Chrome
- Enter the following URL into the address bar: https://app1.terra.group/dsd_uat/

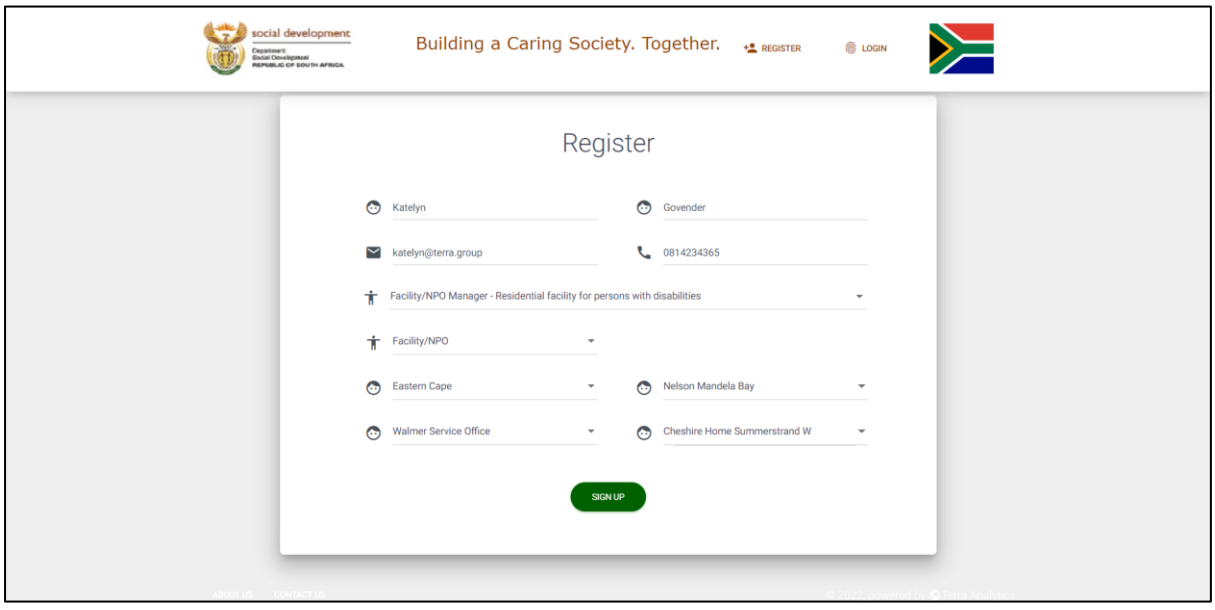
3.1. User Registration

1. After entering the URL into the address bar, the user will be directed to the M&E system landing page.



2. Click on  to register on the system.

3. Below user registration page shall be displayed



4. Capture user details.

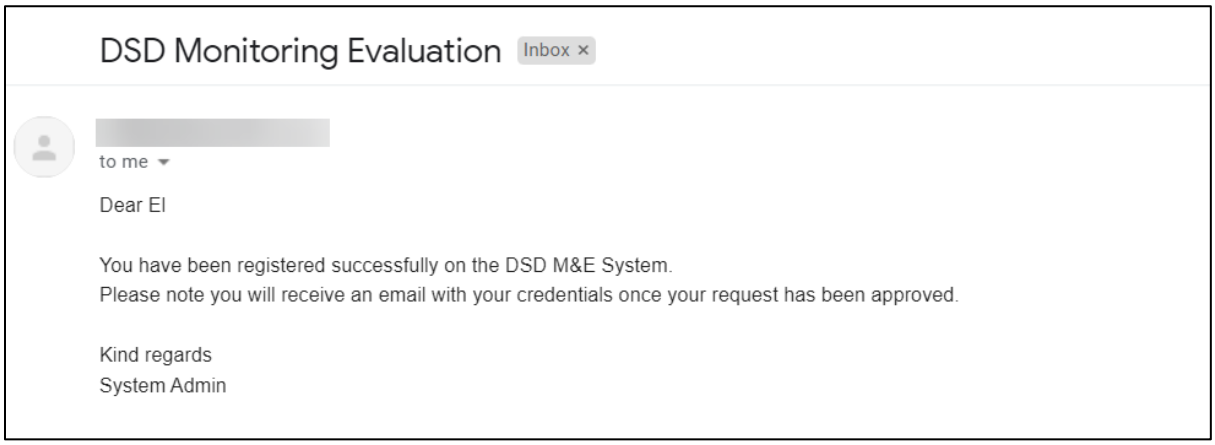
Note: When selecting location type, Provincial users will be requested to select name of province, district users will be requested to select province then district, service point users will select

province, district then service point, facility/NPO users will select province, district, service point, then facility/NPO

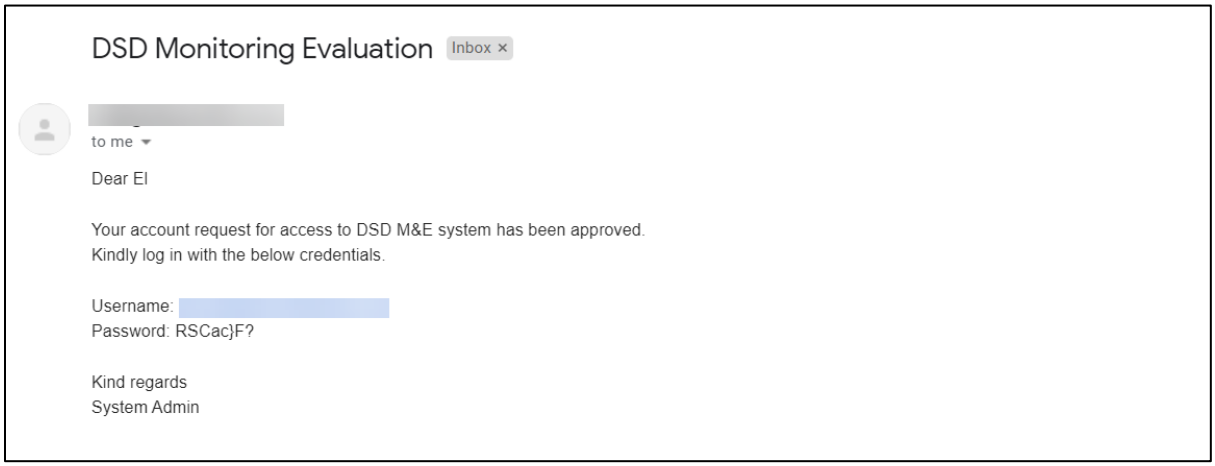
5. Click

button.
6. System will display below message to indicate that the user has been successfully created on the system

7. User will then receive below email notification, awaiting confirmation and approval from the relevant system administrator



8. Once the system administrator approves the user account, system will send below notification with credentials



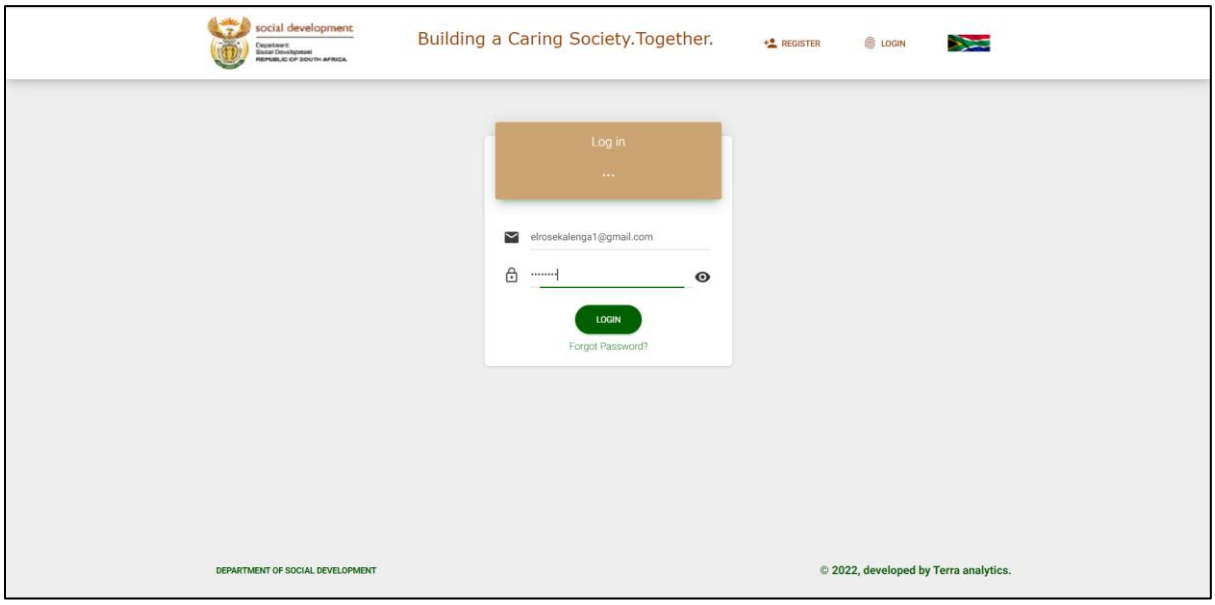
9. User will then log into the system

Notes:

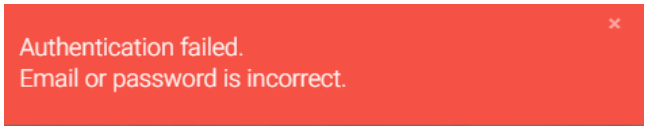
- Once logged into the system, the password can be changed (refer to Change Password in section 3.6)
- Each Province will have its own System Administrator who will be responsible for managing and approving user accounts in the Province, National Users will be managed by the System Administrator at National

3.2. User Login

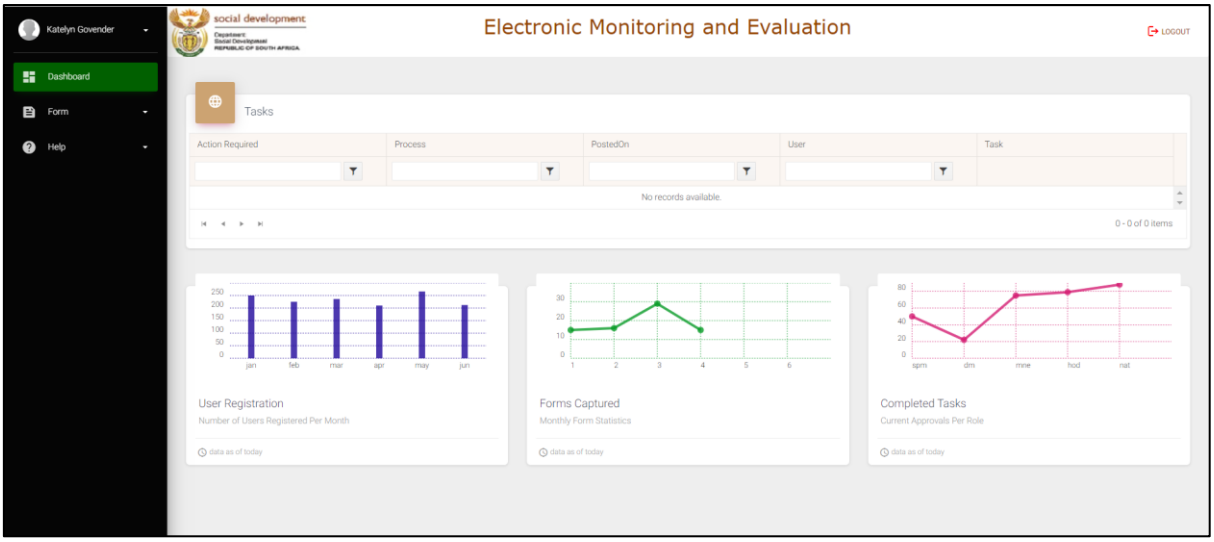
1. Access the following URL to log in to the system
   URL: https://app1.terra.group/dsd_uat/
2. The screen below will be displayed for the system user to enter **Username** and **Password** to access the system



3. Use the view function to view your password before clicking on login
4. Click on the **Login** button to access the system.
5. For valid login details, the Data capturer **home Page** screen shall be displayed.
6. For an incorrect Username and/ Password, system will display below message requesting valid details:



3.3. Home Page

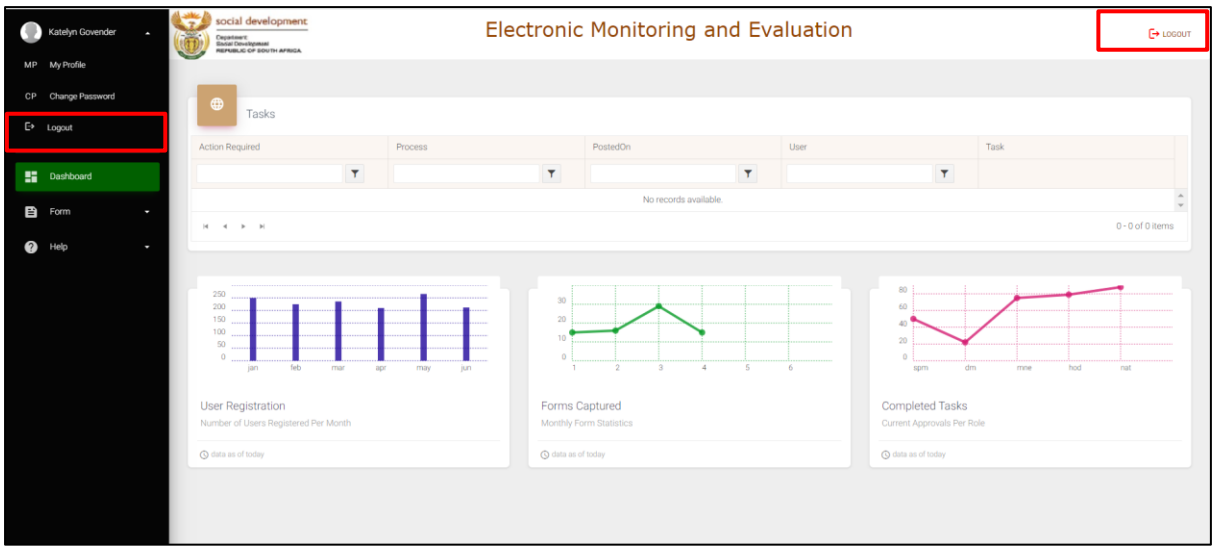


Note that as data capturer, the user will be able to access below functions/menus of the M&E system.

1. **Dashboard** – The overall view of forms captured and completed tasks
2. **Form –** capturing and submission of forms on the system
3. **Help –** Manuals and Videos on how to use the system

3.4. User Logout

1. After a successful user login, user can logout from the system as shown on below screen



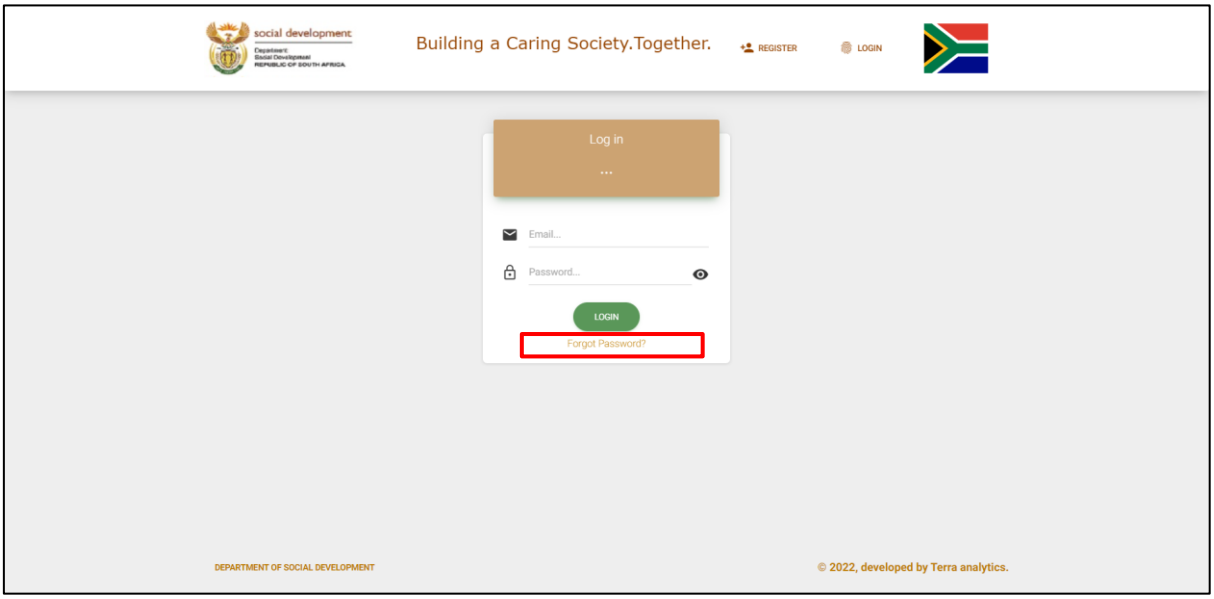
2. Click **Log out**

on home page or click on username then on

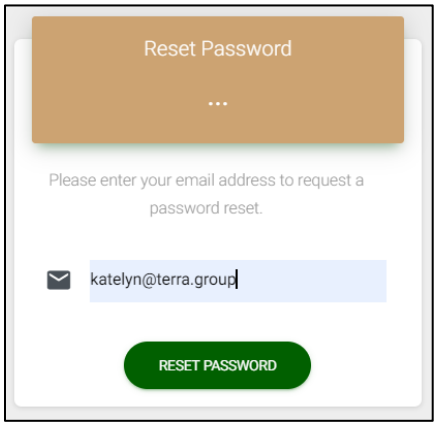
to logout of the system.

3.5. Forgot Password

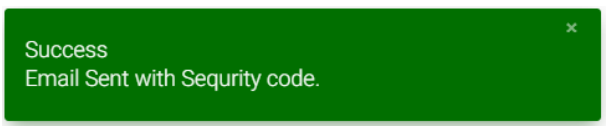
1. If you forget your password, you should be able to reset the password on the login screen by clicking the “Forgot password?” link as highlighted below.



2. Once user clicks on the “**Forgot password?**” link shown above, system will request the registered email address of the user

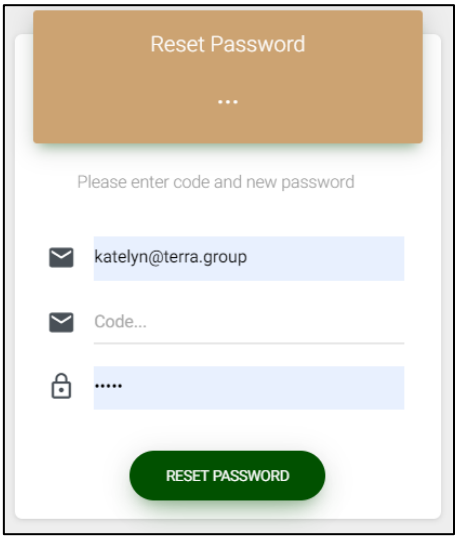


3. Enter registered email address and click “**Reset Password**” button
4. System will display below notification



5. User shall receive below email with a security code

6. Enter the above system generated code on the screen below and click the **'Reset Password'** button

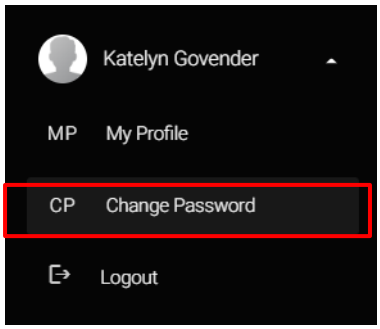


7. System will display below notification
8. User shall be able to log into the system with new password

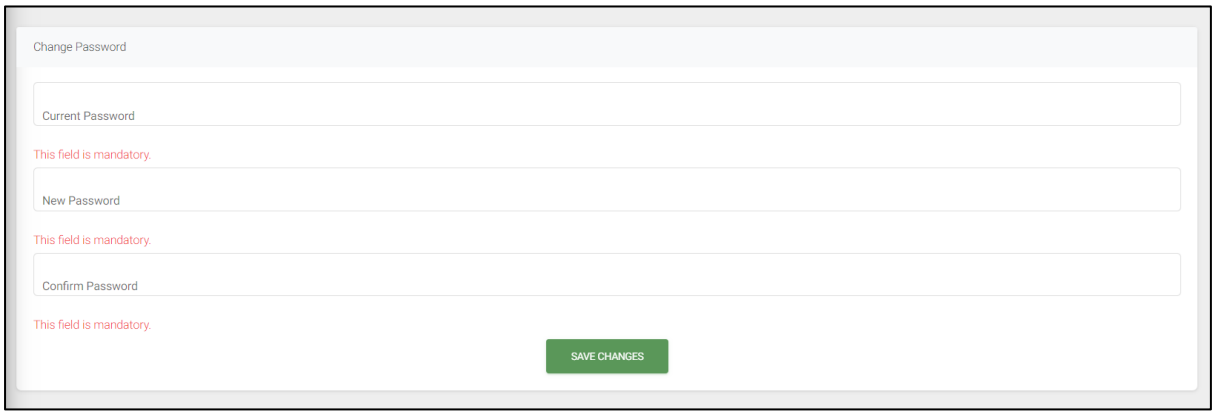
3.6. Change Password

Once logged into the system user can change their password

1. Access Username as shown below and click on Change password

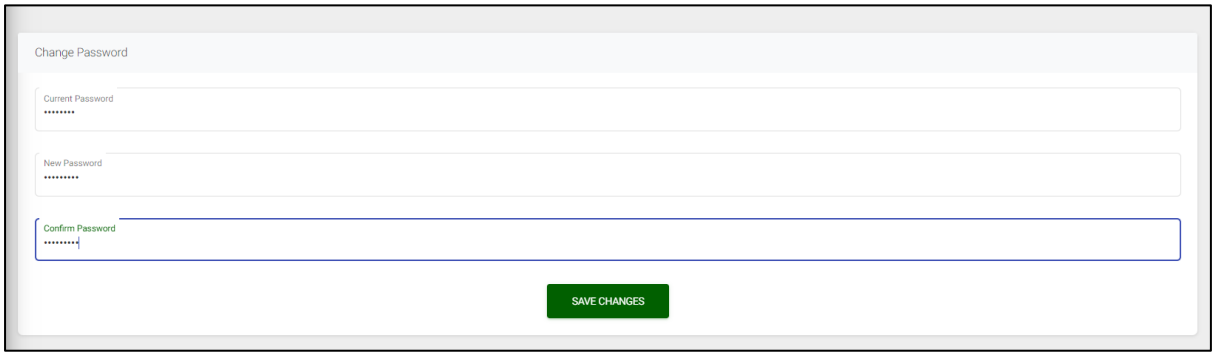


2. System will display below change password screen



3. Enter the **Current Password**.
4. Enter **New Password**.
5. **Confirm Password**.
6. Click the

button to save the changes



7. System will display below notification

8. Password shall be changed, and user will log in using the new password

4. Data Capturing

Data Capturing function enables capturers to capture and submit data on the system. Data will be captured at Facilities/NPOs, Service points and Provincial office, (in some cases data will be captured at District office)

1. Facility/NPO Data Capture: Each Facility will have a facility type on the system, and indicators will be linked to each facility type such that if user is logged in as a facility/NPO manager they can only view/see and capture indicators that are linked to them.

2. Service Point Data Capture: Service Points will capture data on behalf of facilities/NPOs that do not have capacity or have limited access to devices and connectivity.

Note: Service Point Indicators will be captured by the Service Point data capturer role which would be a social worker or any other capturer sitting at Service Point.

3. Provincial office Data Capture: provincial indicators will be captured at provincial office by the nominated users

4.1. Data Capture roles

4.1.1. Facility/NPO Capture roles

Each facility type will have a facility/NPO manager role on the system who will be responsible for capturing information at a facility/NPO level. Below is a list of facility/NPO roles

Facility Type & Capture Role	Responsibility
Facility/NPO Manager CNDC	Capture facility/NPO indicators
Facility/NPO Manager CYCC	Capture facility/NPO indicators
Facility/NPO Manager Child Care & Family Protection (CPO)	Capture facility/NPO indicators
Facility/NPO Manager Community Care Center (CCC)	Capture facility/NPO indicators
Facility/NPO Manager Community Based Center	Capture facility/NPO indicators
Facility/NPO Manager Community Development Project	Capture facility/NPO indicators
Facility/NPO Manager Day-care center & Residential	Capture facility/NPO indicators
Facility/NPO Manager Day-Care Centre for Children with Disabilities	Capture facility/NPO indicators
Facility/NPO Manager Drop-In center	Capture facility/NPO indicators
Facility/NPO Manager HCBC Organisation	Capture facility/NPO indicators
Facility/NPO Manager Homeless Shelter	Capture facility/NPO indicators
Facility/NPO Manager Hospice	Capture facility/NPO indicators
Facility/NPO Manager Independent living facility for persons	Capture facility/NPO indicators

Facility Type & Capture Role	Responsibility
with disabilities	
Facility/NPO Manager Luncheon Club (Service Center)	Capture facility/NPO indicators
Facility/NPO Manager Outreach Preventative	Capture facility/NPO indicators
Facility/NPO Manager Partial Care Facility	Capture facility/NPO indicators
Facility/NPO Manager Partial Care Facility (Special Day-Care-Centre for Children with Disabilities)	Capture facility/NPO indicators
Facility/NPO Manager Protective Workshop	Capture facility/NPO indicators
Facility/NPO Manager Residential facility for older persons	Capture facility/NPO indicators
Facility/NPO Manager Residential facility for persons with disabilities	Capture facility/NPO indicators
Facility/NPO Manager Secure Care Center	Capture facility/NPO indicators
Facility/NPO Manager Social Crime Prevention	Capture facility/NPO indicators
Facility/NPO Manager Substance Abuse Prevention Programme	Capture facility/NPO indicators
Facility/NPO Manager Substance use Disorder (SUD) inpatient treatment center	Capture facility/NPO indicators
Facility/NPO Manager Substance use Disorder (SUD) outpatient treatment center	Capture facility/NPO indicators
Facility/NPO Manager Victim Empowerment Service Center	Capture facility/NPO indicators
Facility/NPO Manager Youth Development Centre	Capture facility/NPO indicators

4.1.2. Service Point Capture roles

Capture Role	Responsibility
Service Point Manager	Capture indicators on behalf of facilities
Service Point Data Capturer	Capture Service Point Indicators

4.1.3. Provincial Capture roles

Capture Role	Responsibility
Programme Manager Welfare Services	Capture Welfare Services indicators
Programme Manager Community Development	Capture Community Development Indicators
Programme Manager Corporate Management Services (Provincial HR Manager)	Capture Manager Corporate Management Services Indicators
Provincial CFO	Capture financial indicators

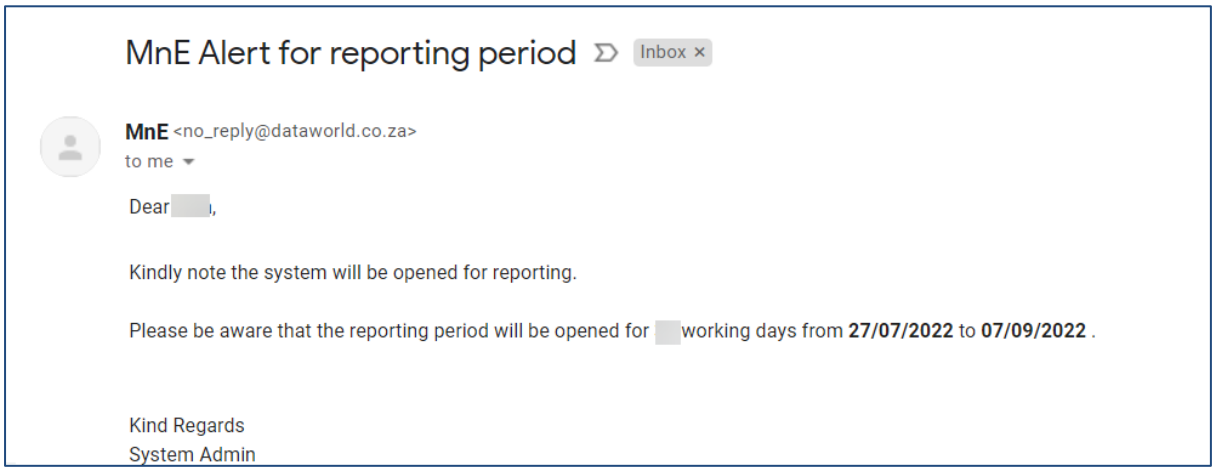
Note: **National Programme Manager Adoptions and ISS** is a capture role at National level who will be responsible for capturing indicators on Adoption

4.2. Capture Period

Capturing will be opened every first 7 working days of each month, in this period all capturers will be requested to capture their data on the system, once the period closes, users will no longer be able to capture data.

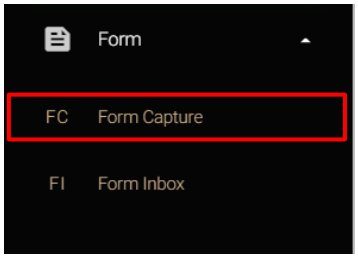
The system will send a reminder to all capturers before the capture period opens. Each user (capturer) will only see indicators that are linked to them.

Users will receive below notification before the period opens



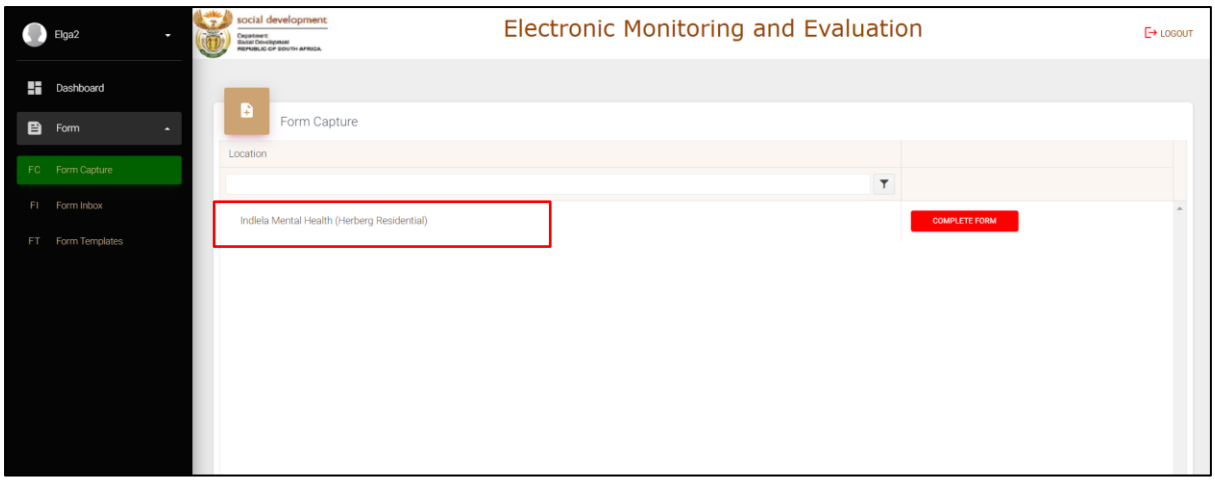
4.3. Facility/NPO Data Capturing

1. Under Form menu click '**Form Capture**' link



2. Screen below shall display with **Facility/NPO Name**

Note: In the below example the facility type used is a Residential Facility for persons with disabilities

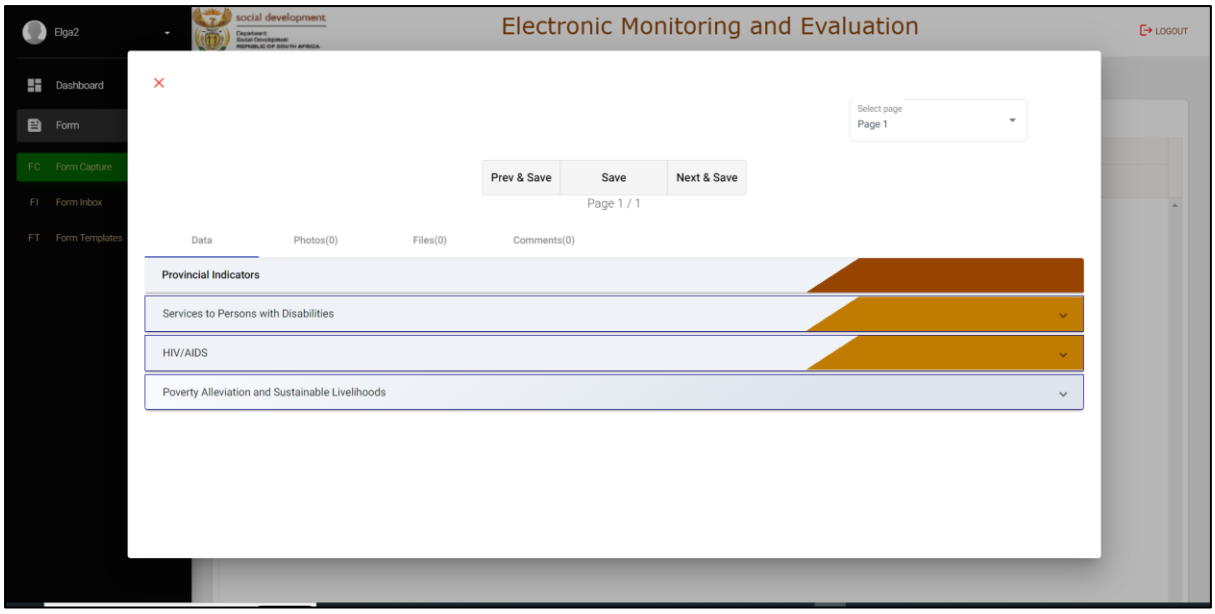


3. Click on

button to complete facility data

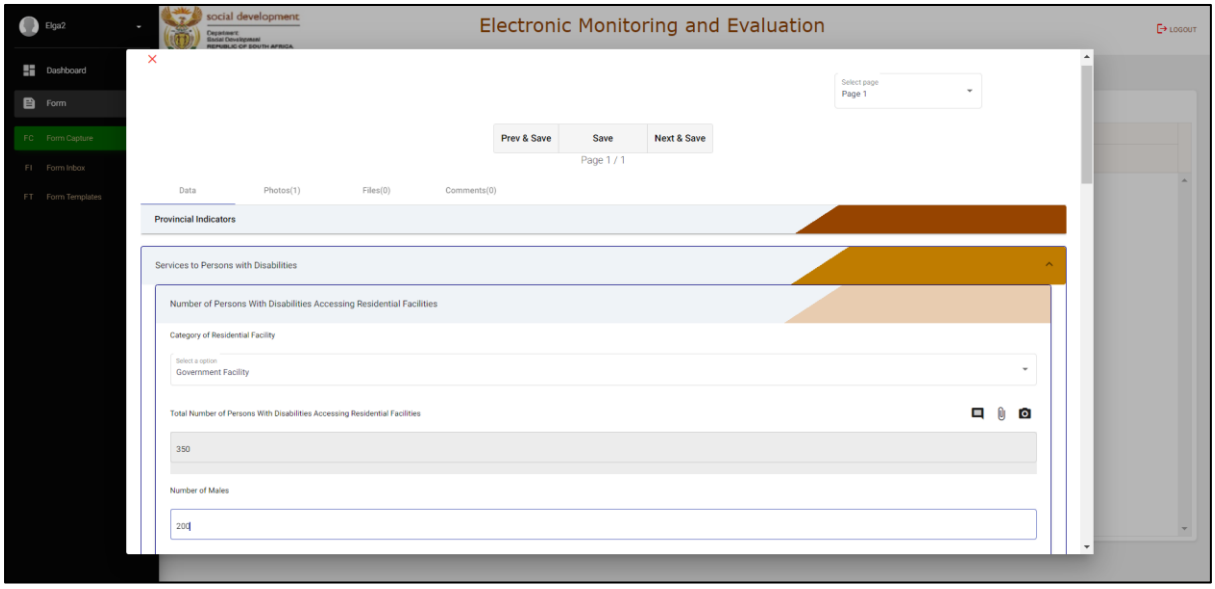
Note*:* The button will remain red until data is captured and submitted then it will turn to a green colour

4. Below screen with Facility/NPO indicators shall be displayed (indicators will be grouped per sub-programme on the form)



5. Expand/click sub-programme tab

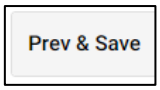
6. System will display indicators

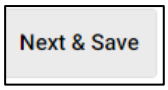


7. Capture Data

8. Click on the

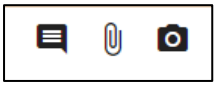
button to save the captured data

9. User may use the 

or 

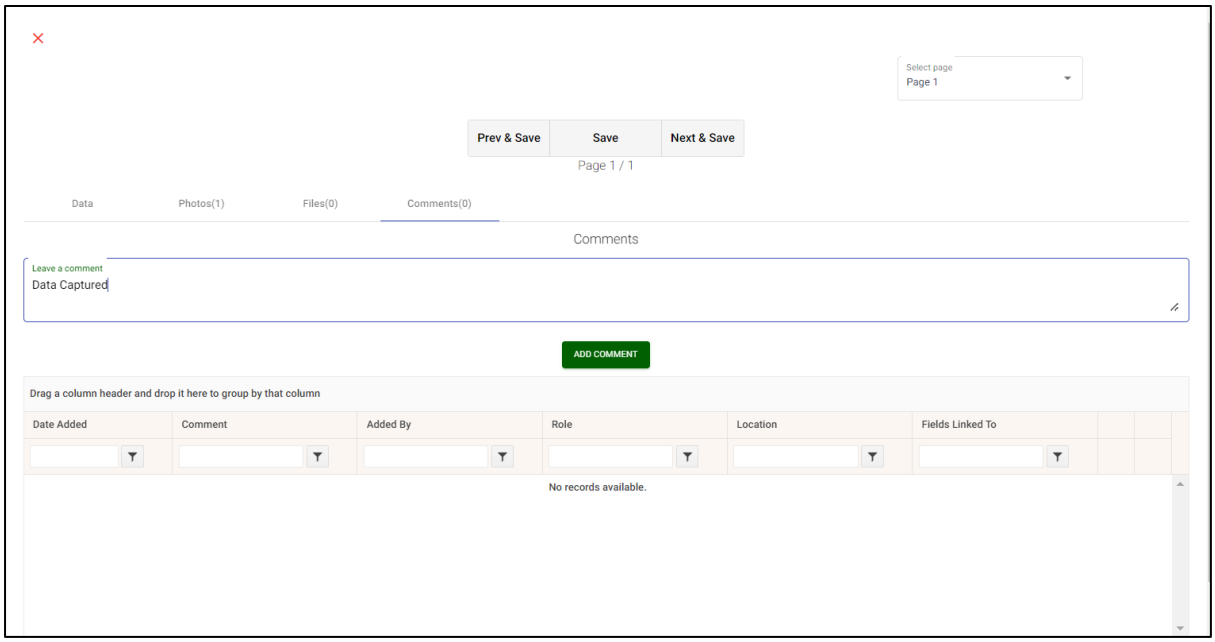
buttons navigate to previous or next pages if exist

10. Below notification will be displayed

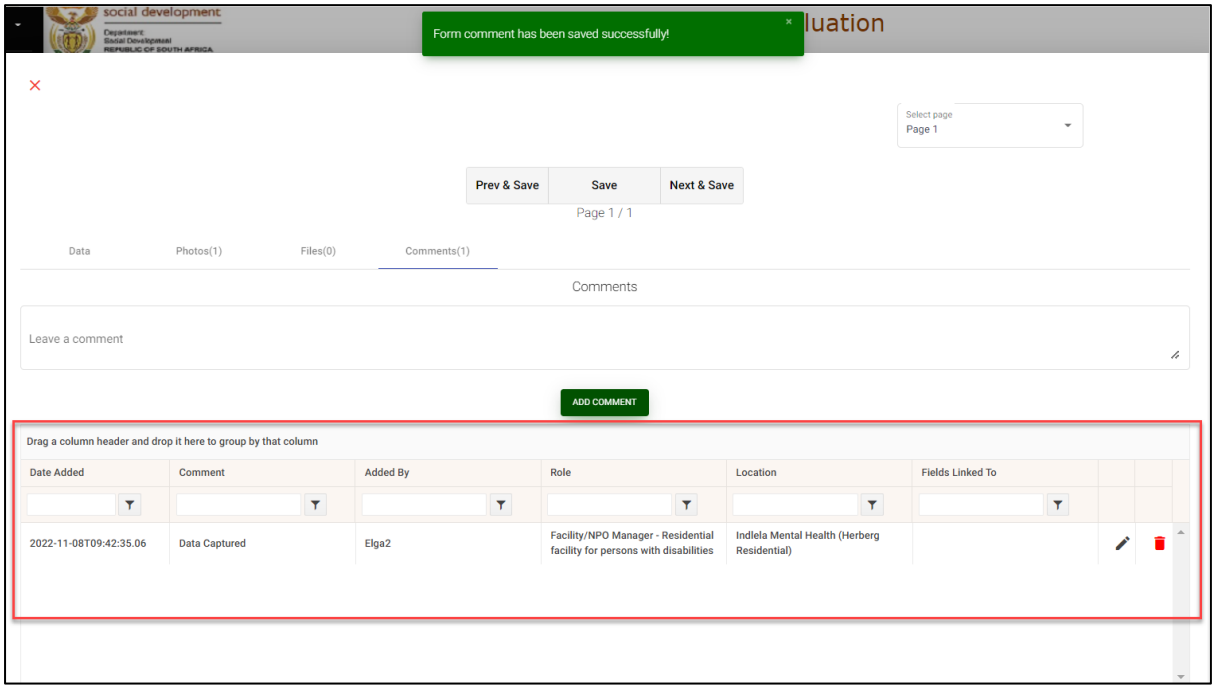
11. Use comment, file, and photo icons 
next to indicator to upload attachments.

4.3.1. Capturing a Comment

1. To capture comment, click the comment icon and screen below will display



2. Capture comment and click the button
3. The below screen with notification shall display

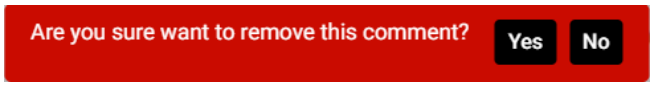


4. Comment shall be added

5. The above screen shows date the comment was added, the captured comment, user who added the comment, their role, their location, and the field the comment was captured against (Indicator Name). Note: in case where comment is not linked to a field, the information field will display blank

6. Click Delete Icon to delete comment

7. Prompt message below shall display



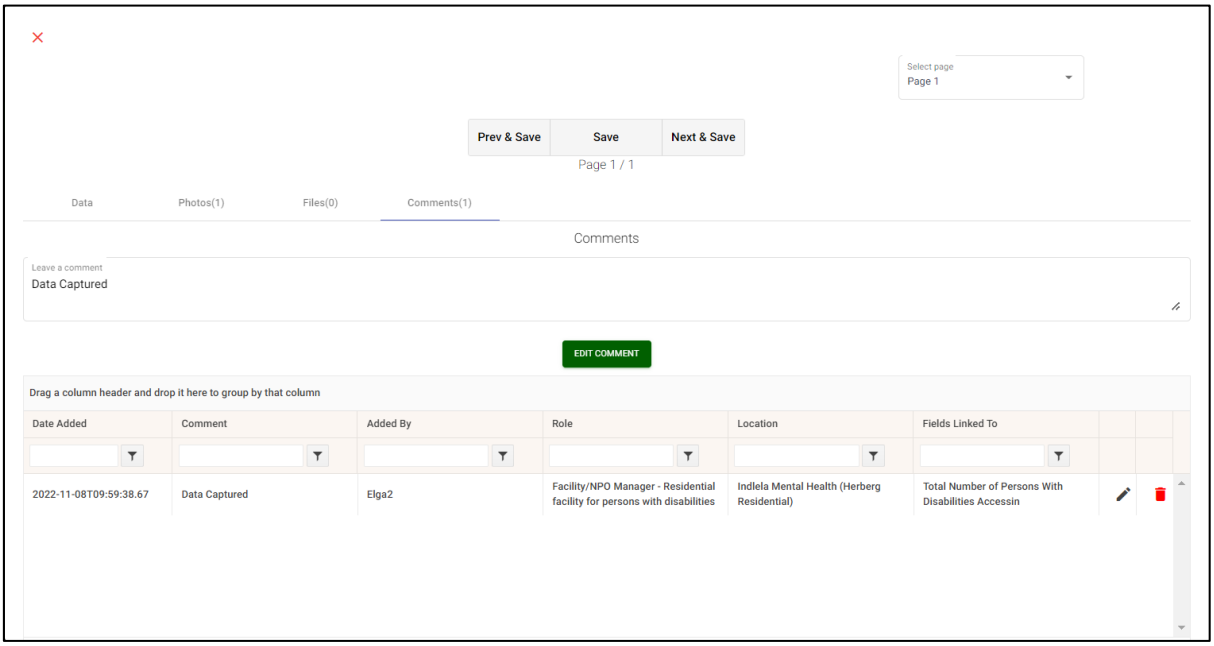
8. Click '**Yes'** button

9. Below notification shall display

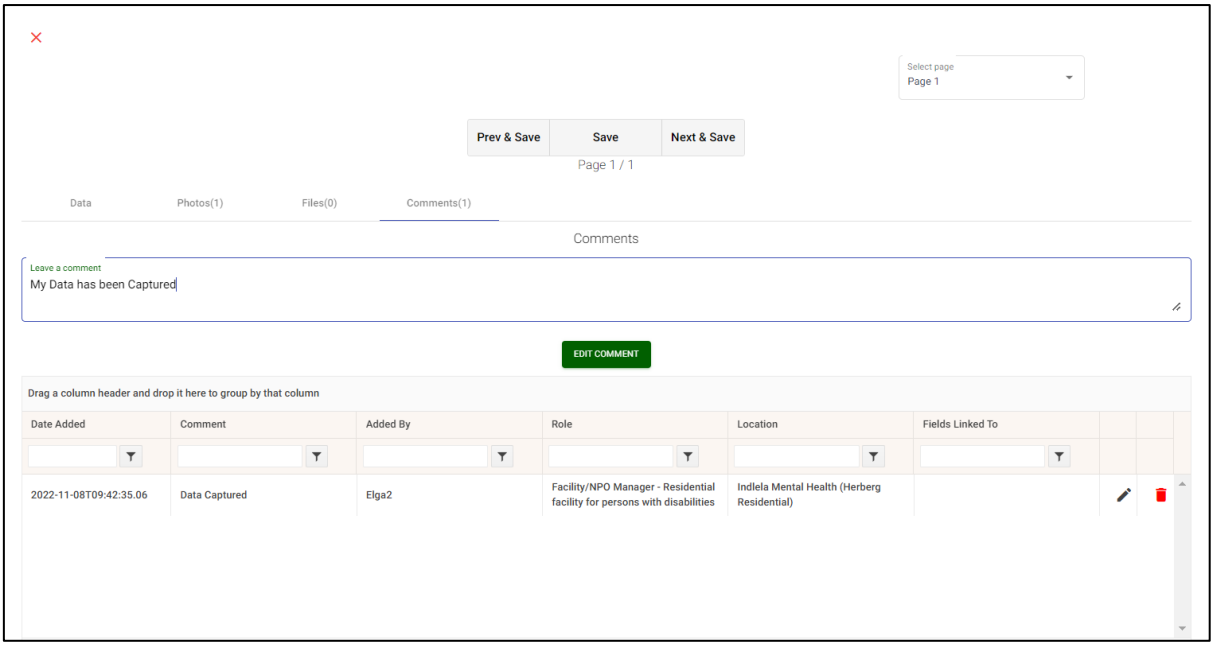
10. Comment shall be deleted

11. Click to edit the comment

12. Below screen will display



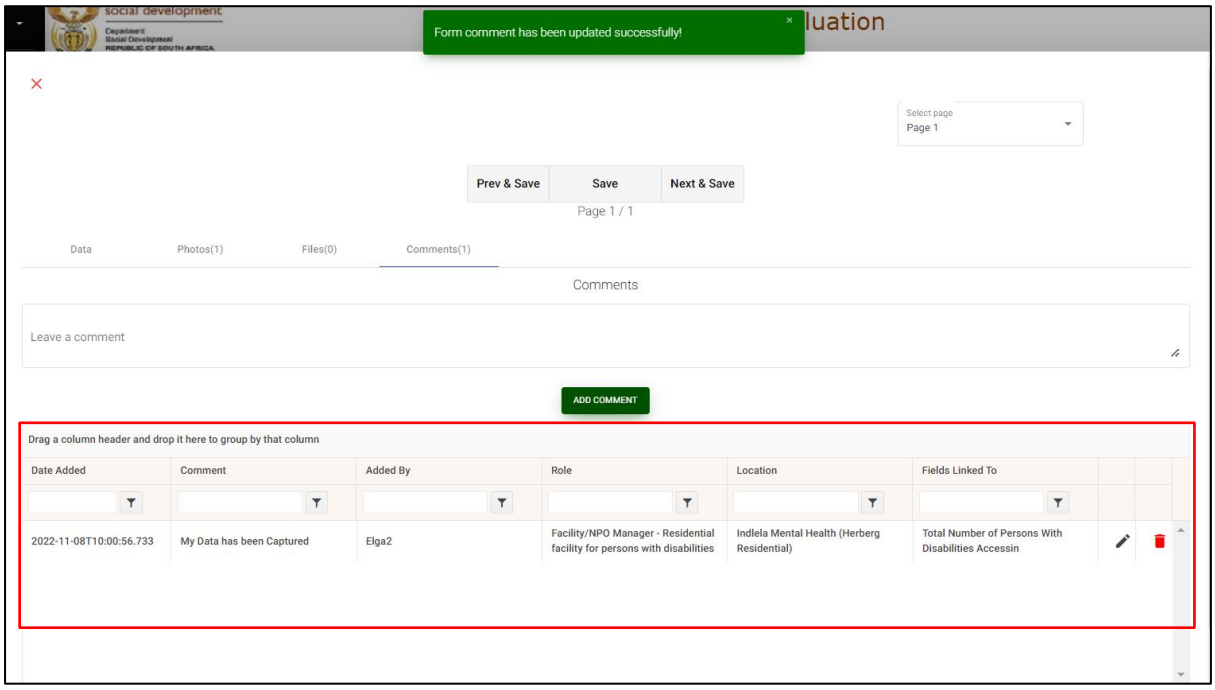
13. Click on the comment field and edit comment as on below screen



14. Click on

button

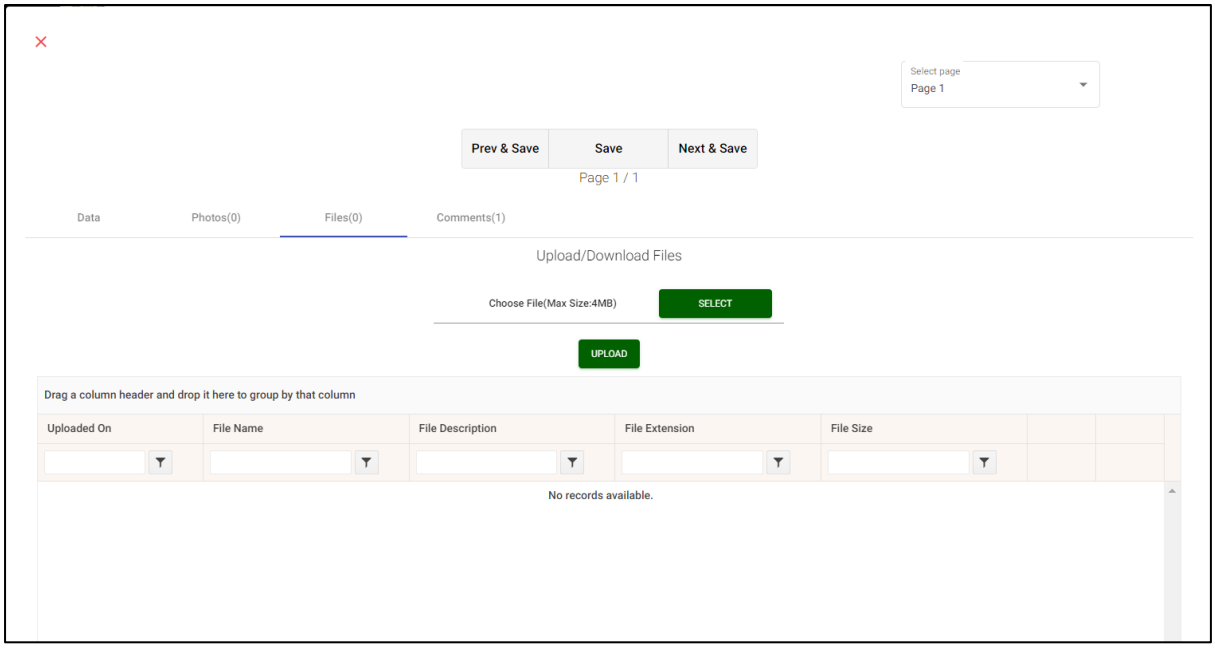
15. The below screen with notification shall display



16. Comment shall be edited

4.3.2. Uploading a File

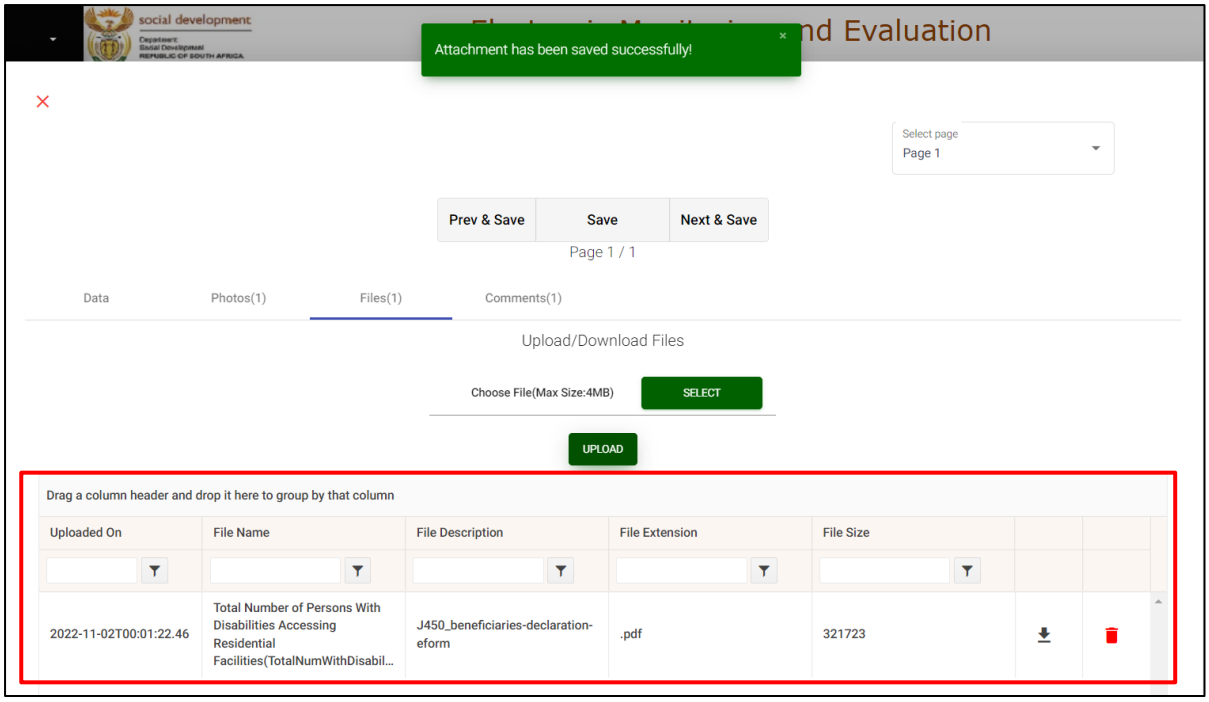
1. To upload a file, click and screen below will display



2. Click on button to select a file
3. Click button to upload file

Note: System will allow Word, Excel, .pptx, file extensions and not more than 4MB of size

4. The below screen with notification shall display

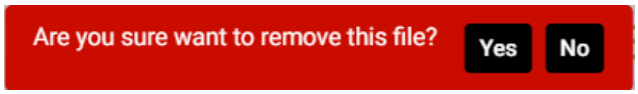


5. File shall be uploaded
6. The above screen shows date the file was uploaded, the file name (the indicator the file has been uploaded against), the file description, file extension, and file size
   Note: in case where file is not linked to a field, the file name will be same as file description

7. Click on to download the file

8. Click Delete Icon to delete the file

9. Prompt message below shall display



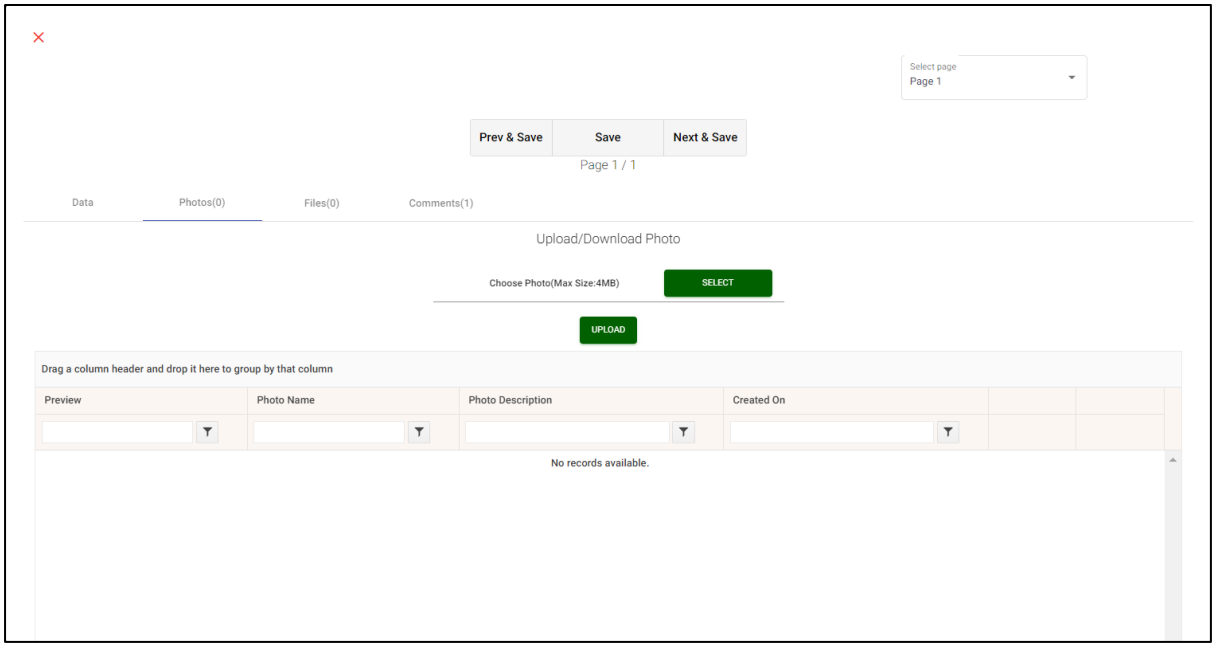
10. Click '**Yes**' button

11. Below notification shall display

12. File shall be deleted

4.3.3. Uploading a Photo

1. To upload a photo, click on photo icon and screen below will display



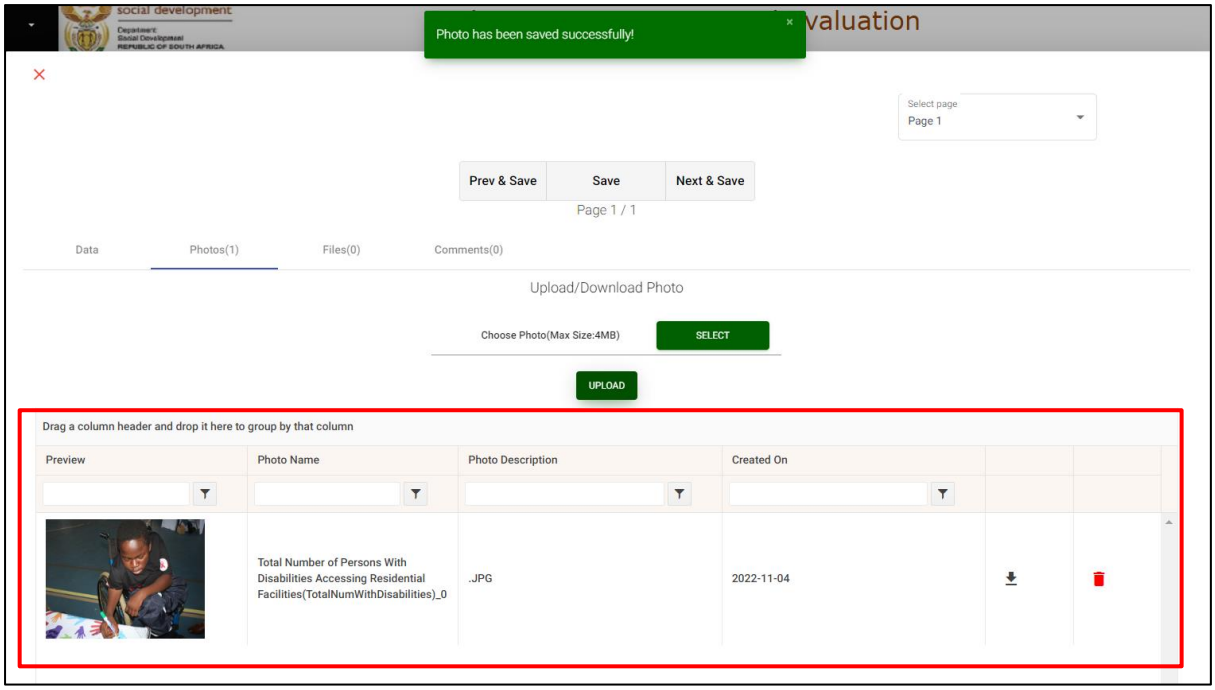
2. Click on

button to select a photo
3. Click

button to upload photo

Note: System will allow JPEG, PNG, GIF, images/photo extensions

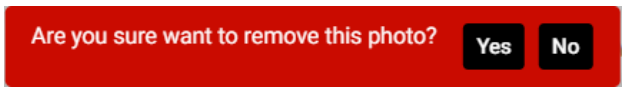
The below screen with notification shall display



4. Photo shall be uploaded
5. The above screen shows the preview, photo name, photo description, and date the photo was uploaded
6. Click on to download photo
7. Go to Preview tab, click on photo to preview
8. Below screen shows preview photo

9. Click on the delete Icon to delete the photo

10. Prompt message below shall display



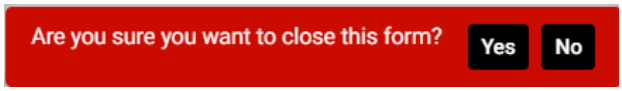
11. Click '**Yes'** button

12. Below notification shall display

13. Photo shall be deleted

14. After uploading all attachments, click on top left of the capture form to close the form

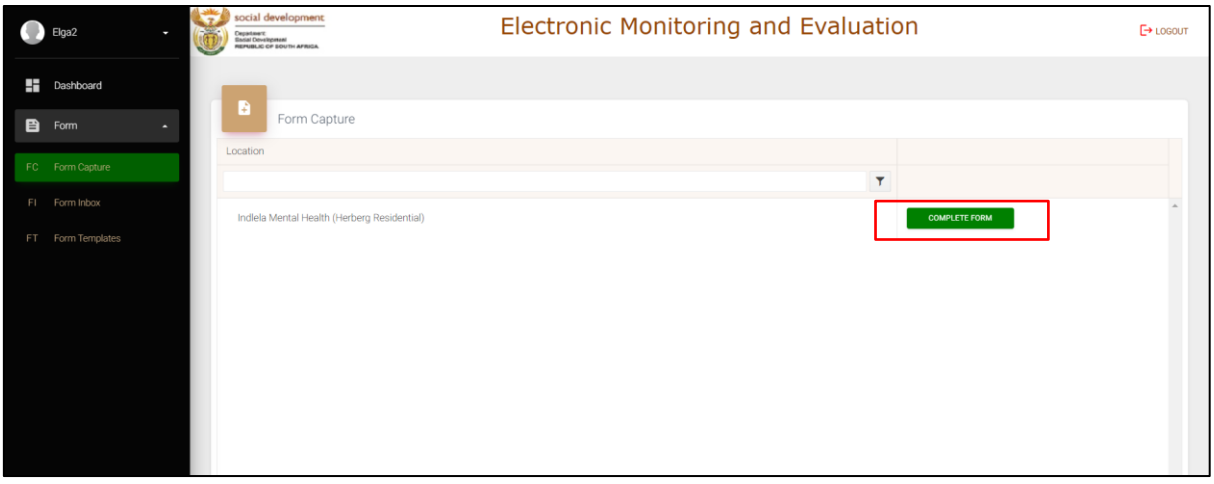
15. Prompt message below shall display



16. Click '**Yes'** button

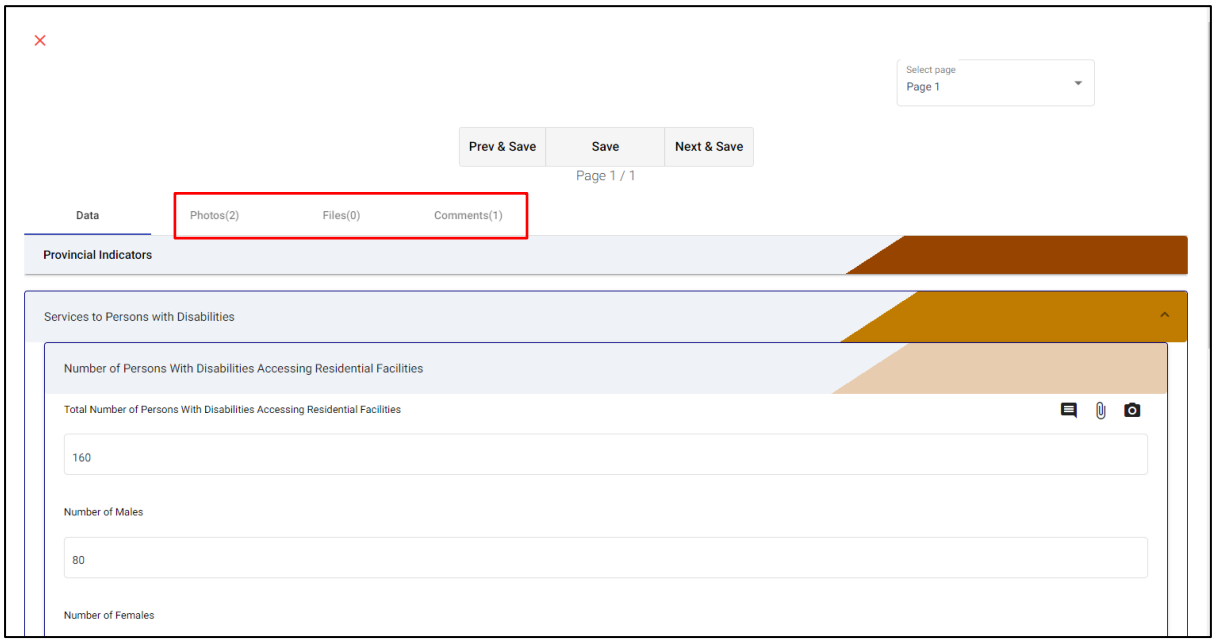
17. Form shall be closed

18. Below screen will display with the 'Complete Form' button turned to a green colour to indicate that data has been captured and submitted.

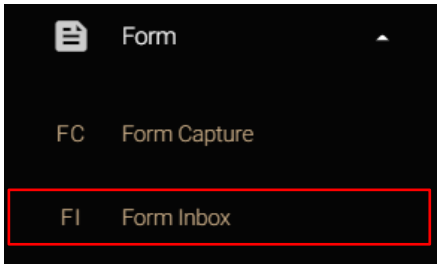


Note: Comment, file or photo may be linked to a specific indicator or may be added as general for the entire form, user may upload more than one photo(s) or file(s) and capture more than one comment(s)

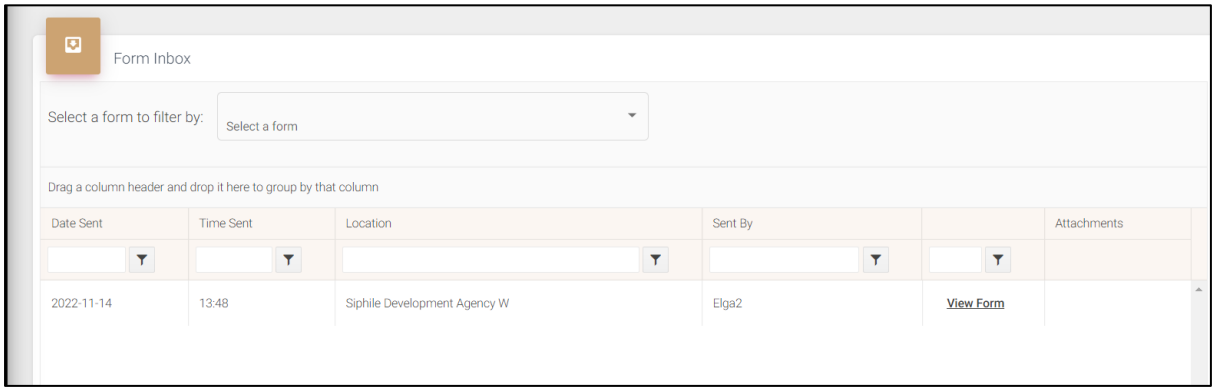
19. To Upload a file, photo, or capture comment as general, navigate between tabs as highlighted on below screen and follow capture process



20. To access the captured form, click 'Form Inbox' under 'Form' menu

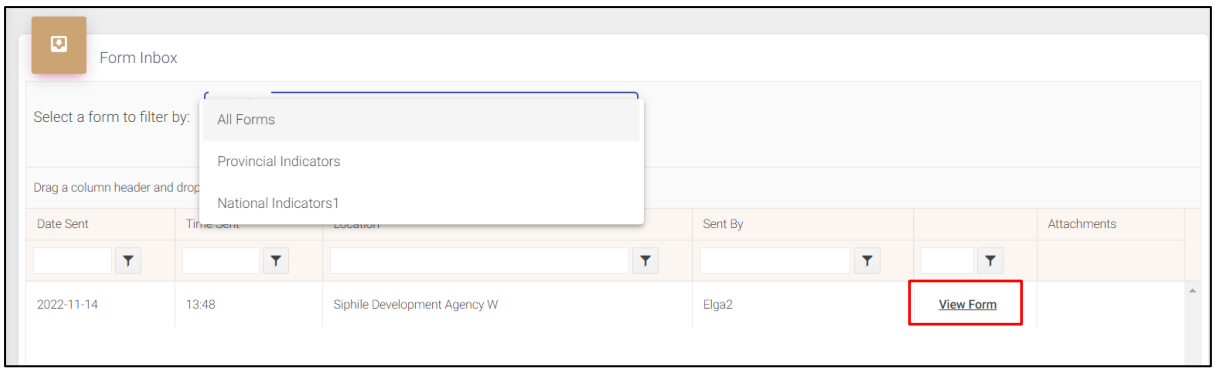


21. Below screen will display

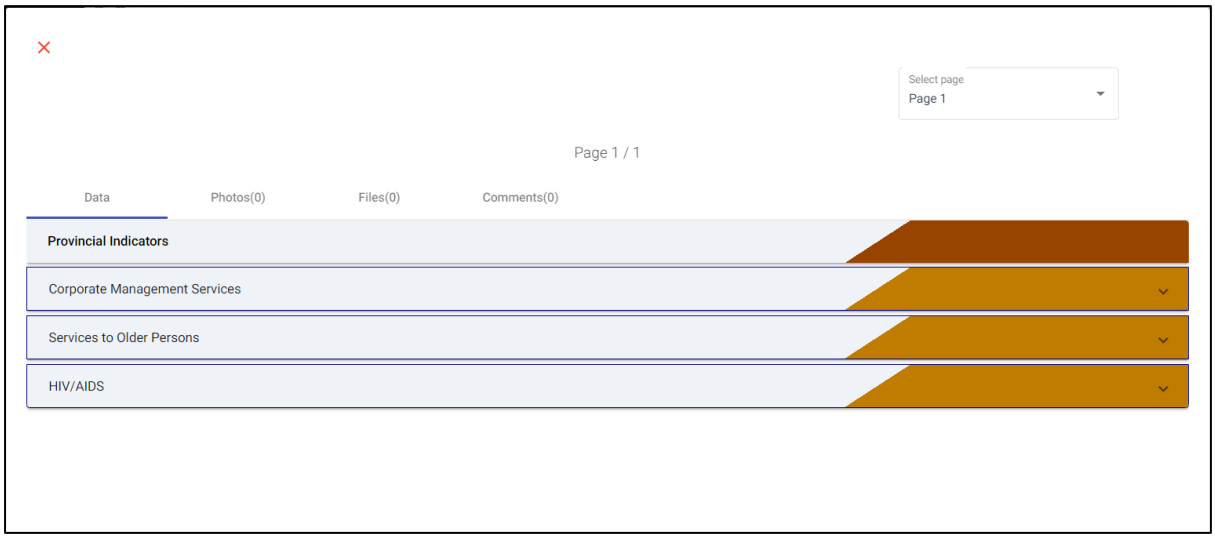


22. Above screen shows location where data was captured, the user who captured the data and attachment(s) if there was any

23. Select form and click on the 'View Form' link to view the captured data



24. Below captured form will display



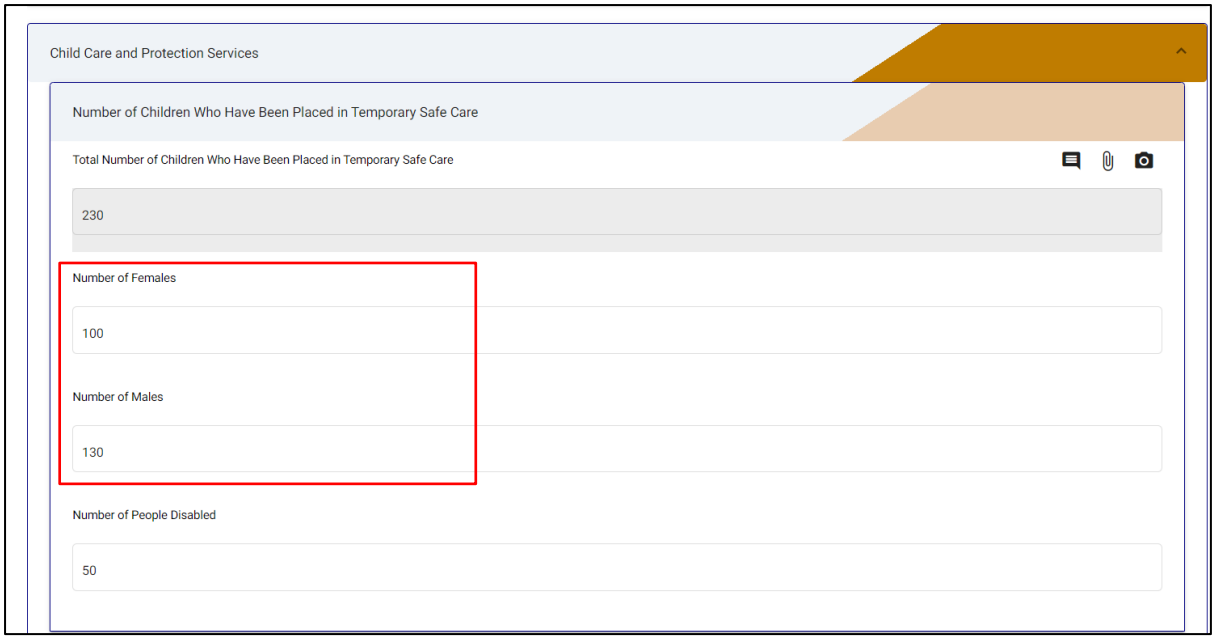
• Indicator Form Capturing

Some indicators will have disaggregation, some will have categories, some will have both disaggregation and categories, and some will only require total values to be captured. Note that the categories and disaggregation types differ depending on indicators.

❑ **Indicator disaggregation capturing**: User will capture the total value then disaggregated values. **Note**: The sum of the disaggregated values should be equal to the total value captured. Indicators that have Males and Females disaggregation, user will first capture the Males and Females figures then system will calculate the total figure based on these two fields, user will then capture the rest of the disaggregation making sure the captured figures equal to the system calculated total figure.

The below example shows an indicator with Gender and Disability disaggregation

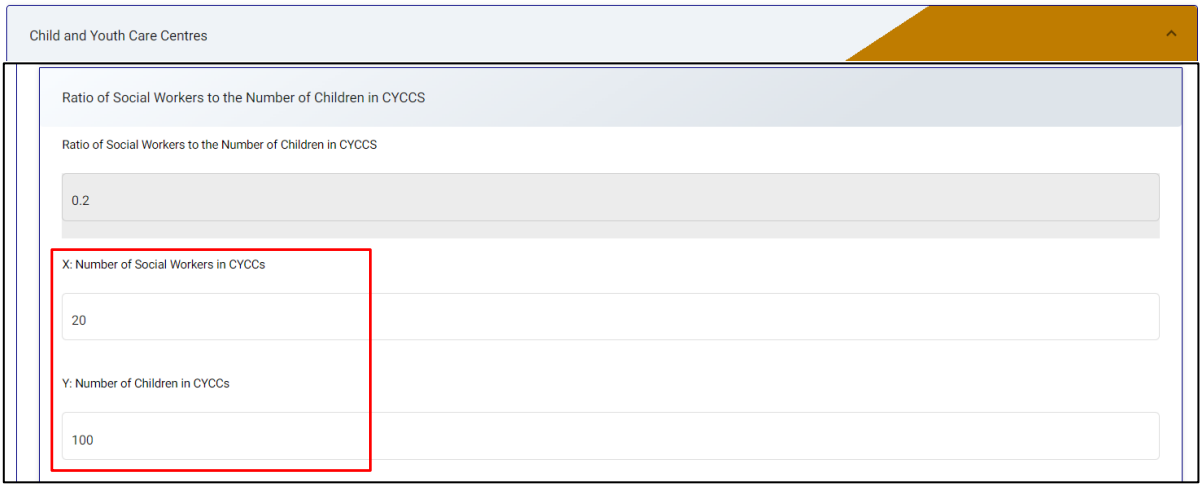
1. User will capture Males and Females figures
2. System will then calculate the total value based on the two fields
3. User will there after capture disability figure from the total figure



- **Indicator Ratio capturing:** User will capture the X and Y variables the system will calculate the ratio based on X and Y captured. **Note**: ratio calculated value will be displayed as decimal on capture screen, however, when pulling reports, the correct ratio format will display

The below example shows a ratio indicator

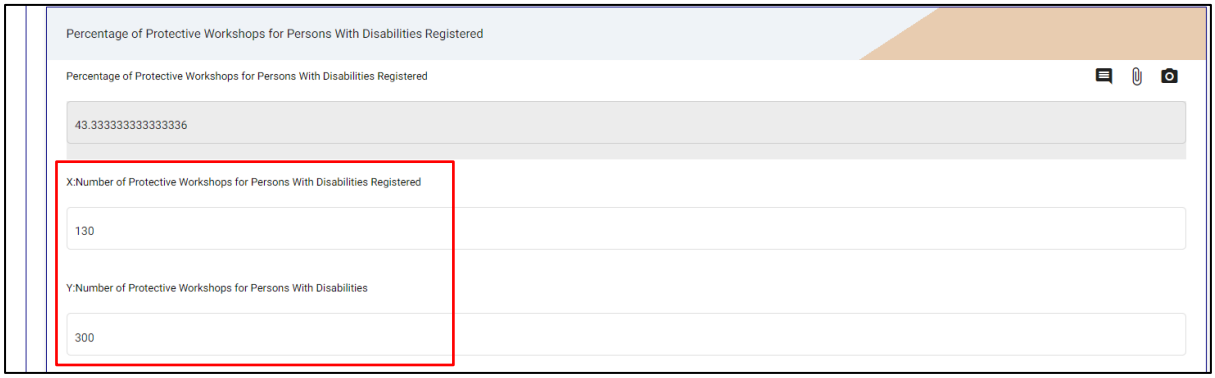
1. User will capture X variable
2. User will capture Y variable
3. System will then display the ratio calculated value



- **Indicator Percentage capturing:** User will capture the X and Y variables the system will calculate the percentage based on X and Y captured. **Note**: percentage calculated value will be displayed as decimal on capture screen, however, when pulling reports, the correct percentage format will display

The below example shows percentage indicator

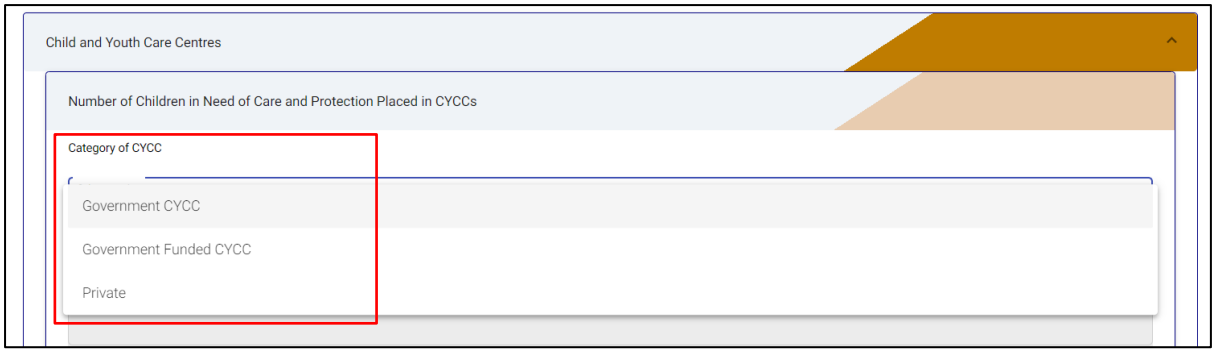
1. User will capture X variable
2. User will capture Y variable
3. System will then display the percentage calculated value



- **Indicator category capturing:** User will select a category from the dropdown on capture screen, or capture indicator categories on the provided fields, system will then calculate total value based on captured categories

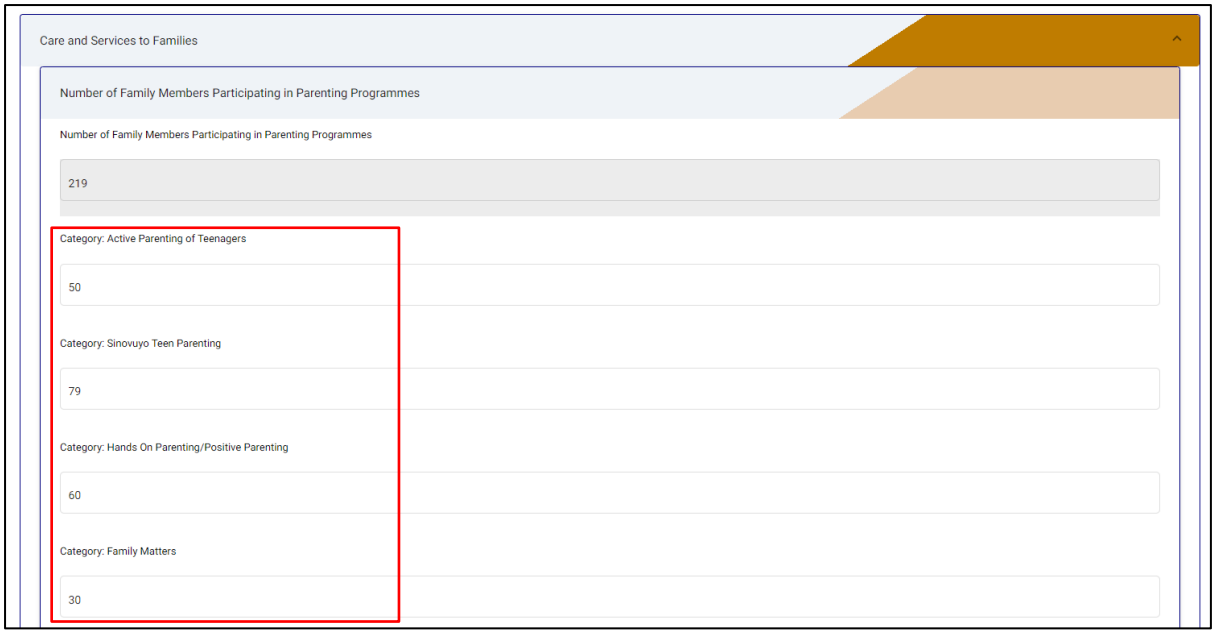
The below example shows an indicator where categories are selected from a dropdown

1. User will select a category from the dropdown



The below example shows an indicator where categories are figures that need to be captured on the provided fields

1. User will capture the indicator categories
2. System will then calculate the total value based on the captured categories

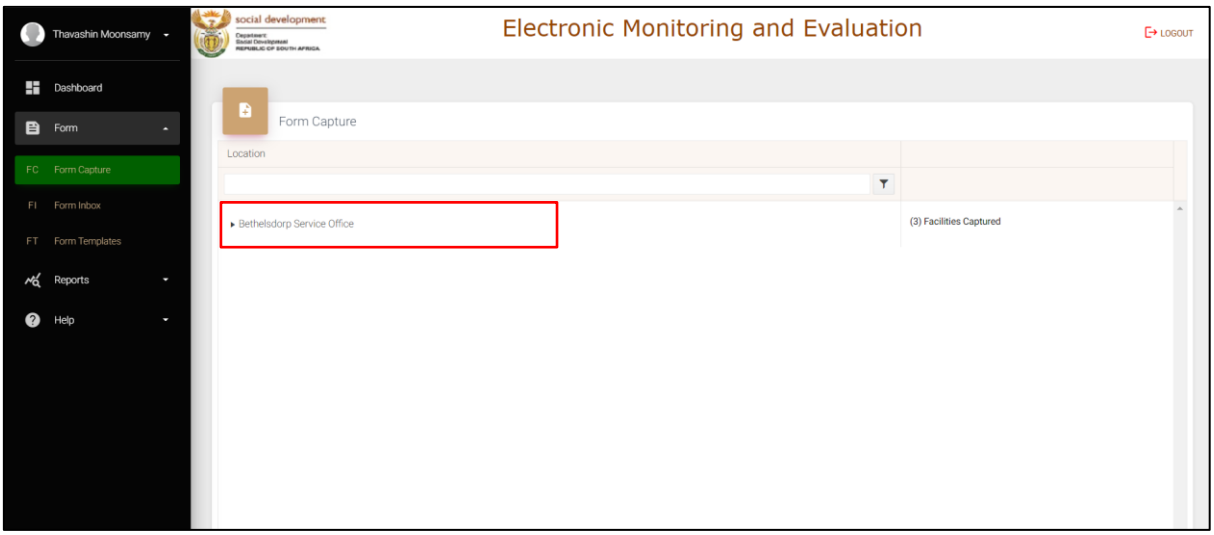


4.4. Service Point Data Capturing

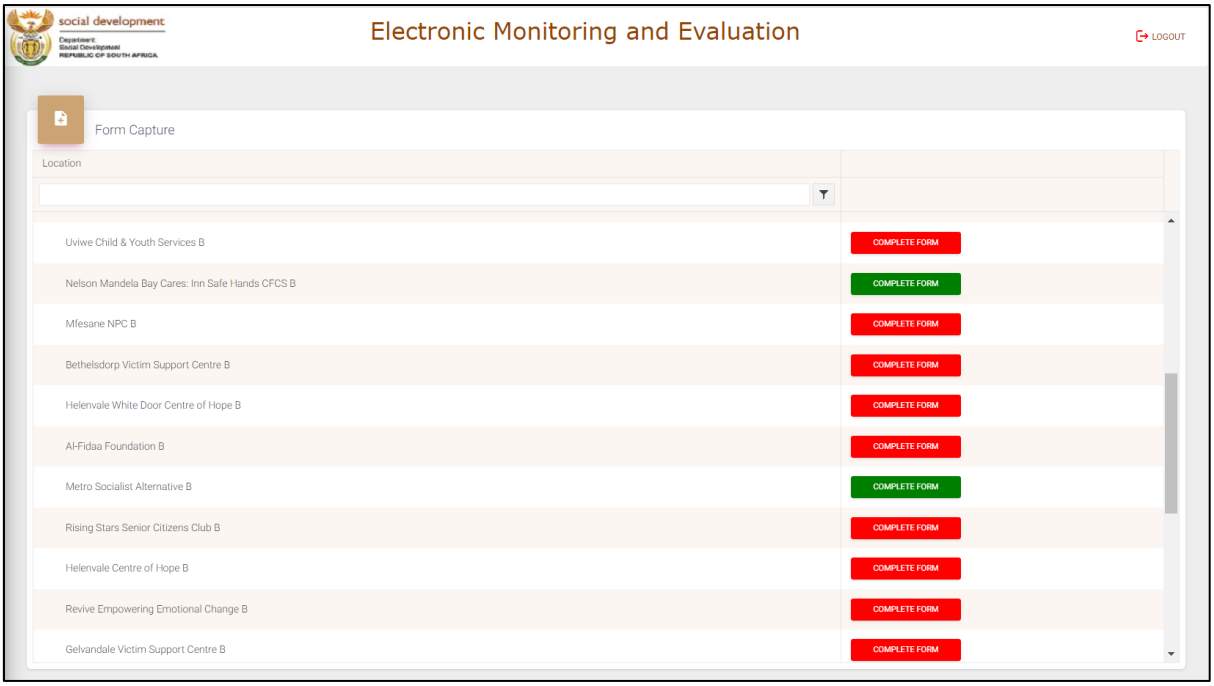
4.4.1. Service Point Manager

The Service Point Manager will capture information on behalf of facilities

1. Once logged in as Service Point Manager, under Form menu click '**Form Capture**' link, screen below shall display

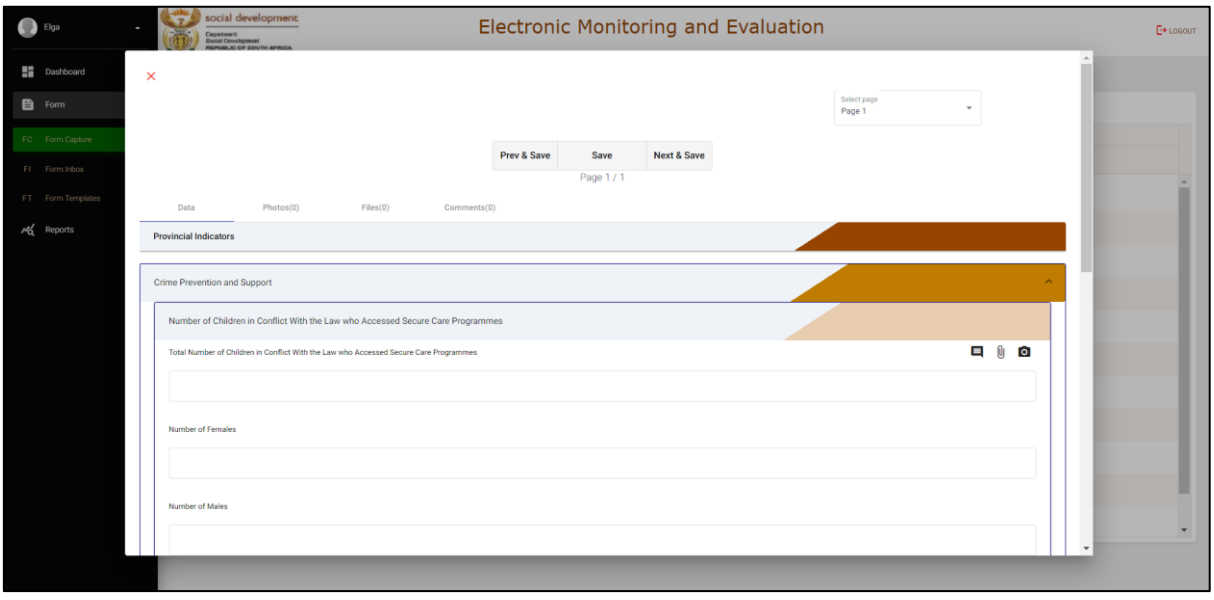


2. The above screen displays name of Service Point the user is linked to
3. Expand ▶ on service point
4. Screen below shall display with all facilities under the service point



Note: Facilities that would have captured data will have the '**Complete Form**' buttons green, facilities that would not have captured data will this button red. The service Point Manager will then capture data on behalf of these facilities

5. Click the COMPLETE FORM buttons to capture data for each facility
6. For each facility, below capture screen will display with indicators linked to the facility

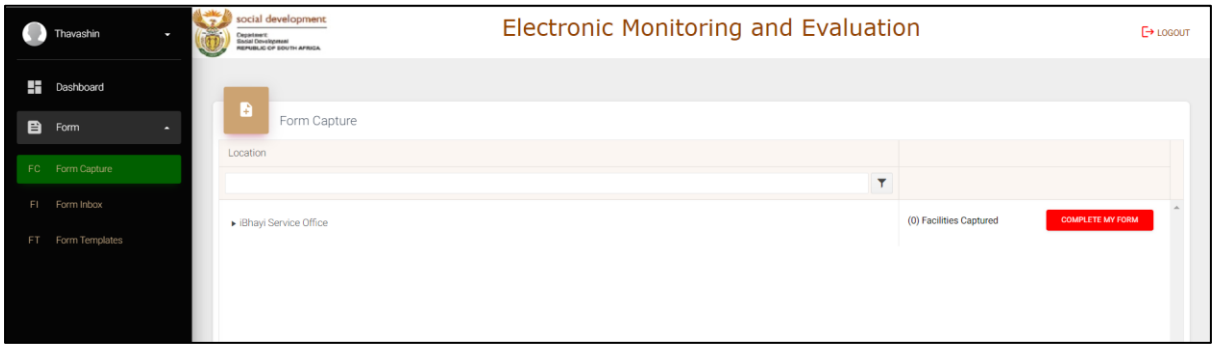


7. Follow capture process in section 4.3 to capture facility data

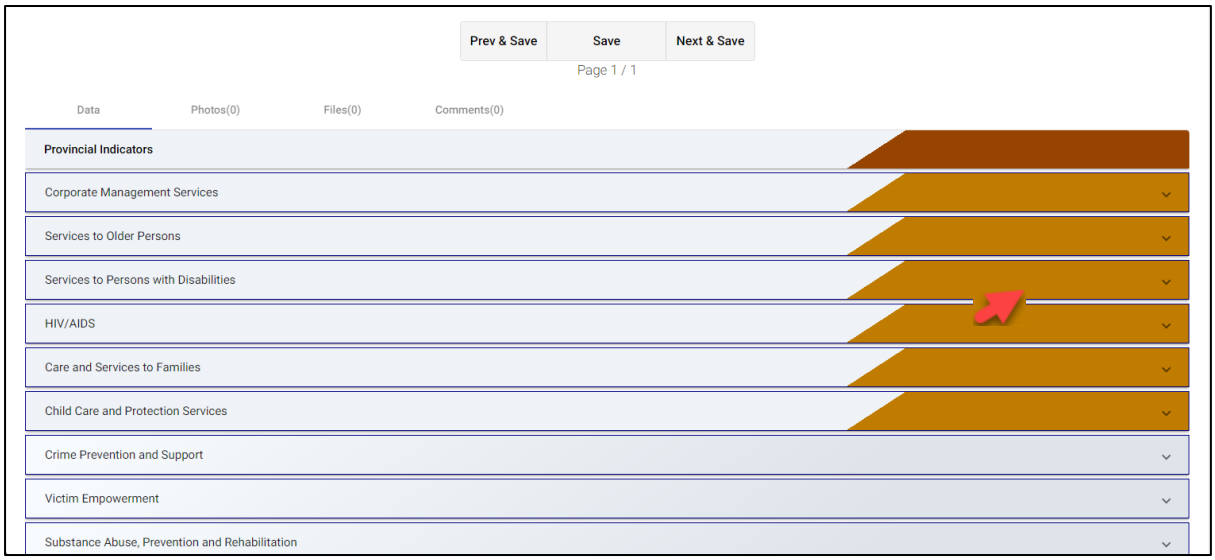
4.4.2. Service Point Data Capturer

Indicators collected at Service Point level will be captured by Service Point Data Capturer role

1. Under Form menu click '**Form Capture**' link, screen below shall be displayed



2. Click the '**Complete my Form**' button to capture Service Point indicators, below screen with service point indicators will display

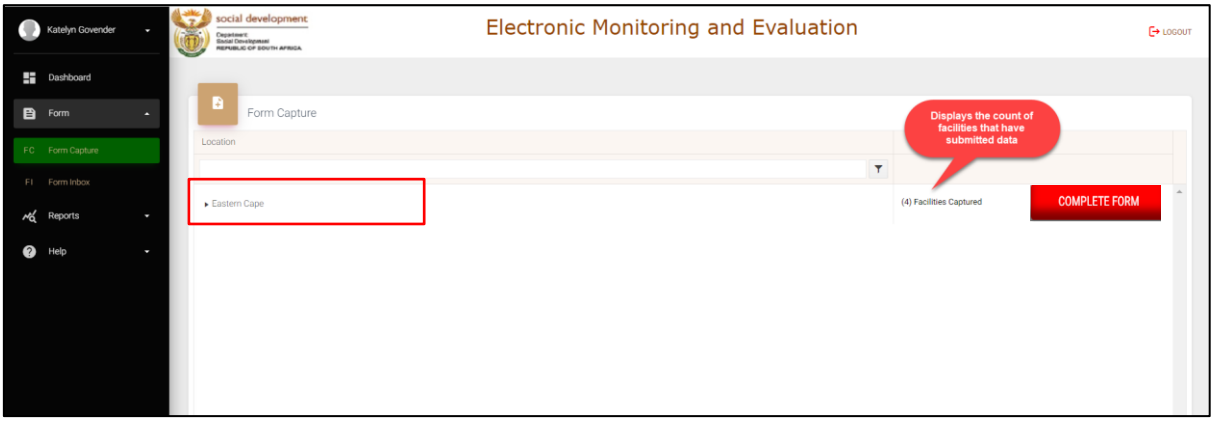


3. Expand each tab and follow capture process in section 4.3

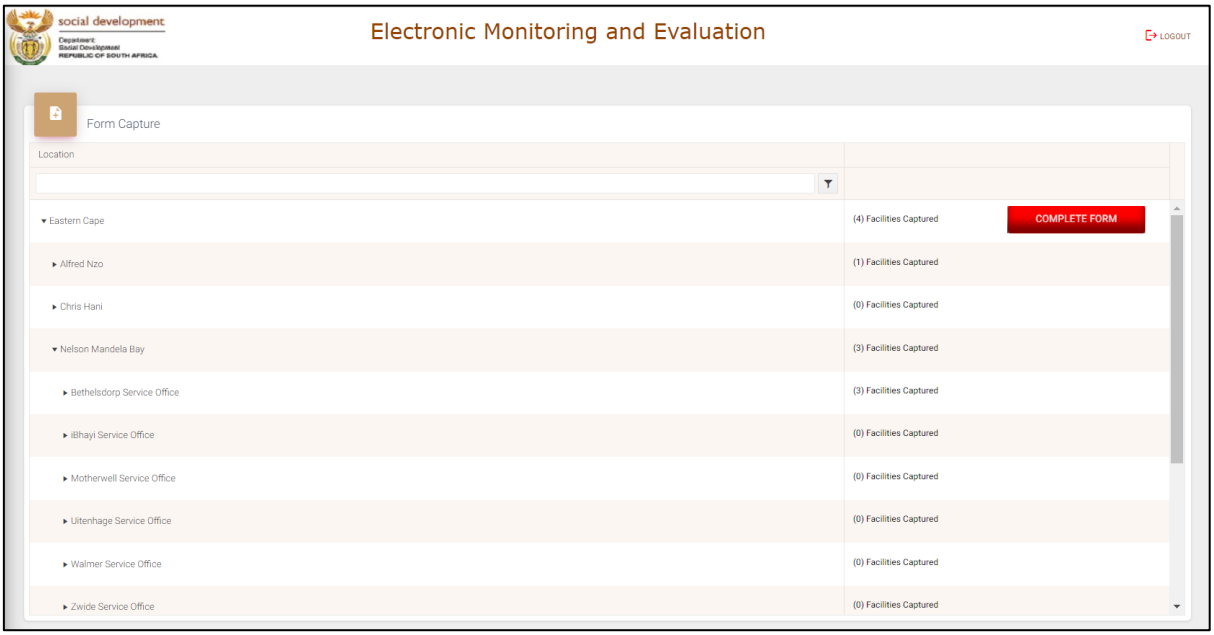
4.5. Provincial Data Capturing

Welfare Services Programme Manager, Community Development Programme Manager, Corporate Management Services (Provincial HR Manager), and Provincial CFO will be the main capture roles at Provincial office, each user will be responsible for capturing indicators linked to their role.

1. Click '**Form Capture**' link, under **Form** menu and below screen will display



8. The above screen displays name of Province the user is linked to
9. Expand ▶ on Province name to view all captured data from all below locations (Districts, Service Points, and facilities)



10. Click the COMPLETE FORM button to capture data
11. The below screen displays capture form for Welfare Services Programme Manager role

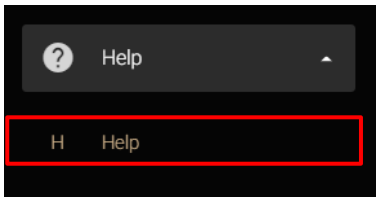
Note: Indicators will be grouped per sub-programmes

12. Expand each tab and follow capture process in section 4.3 to capture data

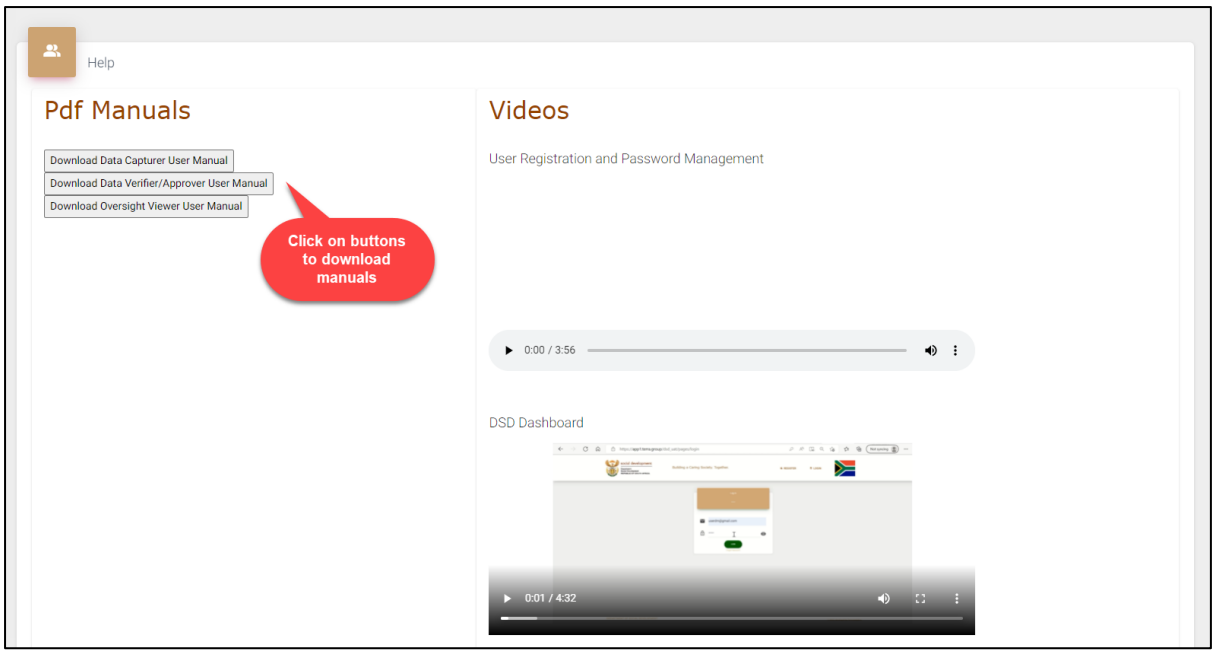
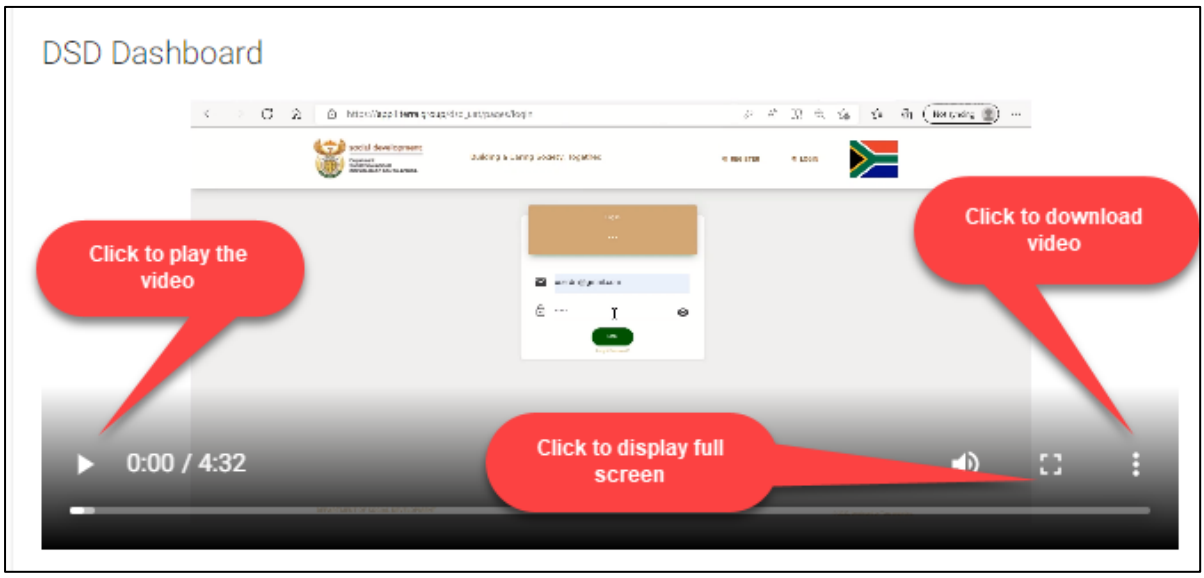
5. Help

The 'Help' function is available for users to view manuals and videos on how use the M&E System

To access this function, click '**Help'** under **Help** menu as below



1. Screen below shall display



2. Go to a specific video to download and display full screen