Bluesquare
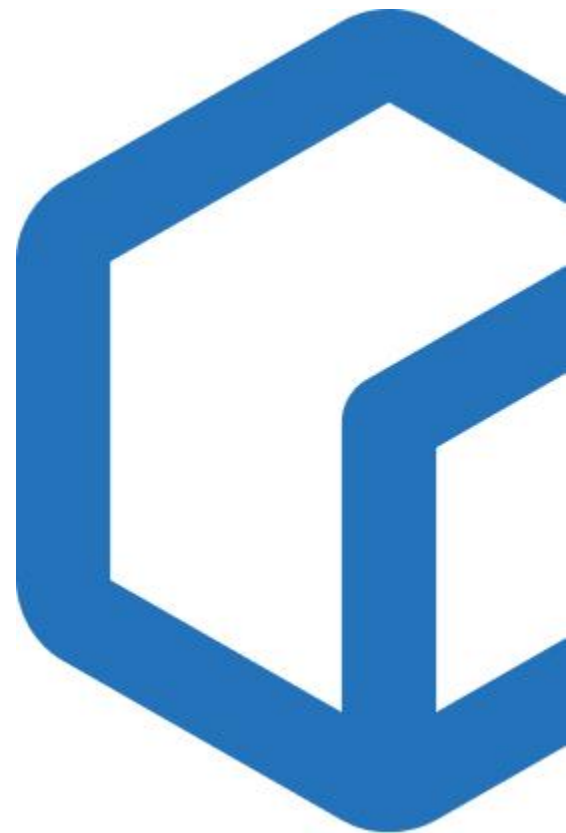
openIMIS – UX review
Insurees & Families

May – 2020

User eXperience

HUGE domain, tons of books, methodologies,…

… so let's (try to) be pragmatic:

1. **We want it:**

   eat 2 of the 3 first bullets

   in the news letter!!

**openIMIS October 2019 Software Update Release**

Just in time for Christmas, the openIMIS Developer Committee announces the release of the October version of OpenIMIS. Although we clearly missed the deadline, it was worth waiting: the new release contains most of the programming work that was invested into modularising the architecture of openIMIS and opening up the system for interoperability with other eHealth systems. That's a major breakthrough for the project and we are all happy that we have seen the results operate successfully during a number of hack-a-thons and conferences in the last two months.

Particularly the package includes:
- The new core of openIMIS that is based on pure open source technologies such as Python/ Django and Javascript/React
- A rewrite of the claims module with shiny new user interfaces based on Material-ui for beautiful interface design
- Framework for beautiful interface design
- A set of HL7 FHIR APIs (interfaces) that allow other systems (e.g. OpenMRS, BAHMNI, Odoo, DHIS2) to connect to openIMIS for data synchronisation

User eXperience

... and for good reasons:
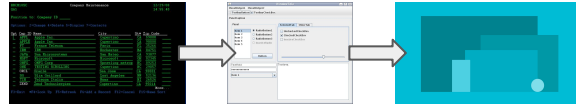
- Users get used (are trained) to interact with many IT systems,

  not <<following the trend>> has impact on software usability:

  - efficiency

  - errors

- ... but also on technical point of view:

  - application not supported anymore (os/browser versions,...)

  - tooling for (and knowledge of) the technology disappear

User eXperience

2. We have very **strong constraints**

- Be <<rather close>> to **existing (legacy) UI**

  chosen migration strategy is to go from 'legacy' to 'new' openIMIS should not require intensive user trainings,...

- Modularity and **country customizations** induce variations

  … in the long run, there won't be "one" openIMIS but a 'reference' openIMIS, customized (extended) by countries

"Reference" enquiry dialog

added "contributions"

"Nepali" enquiry dialog

removed useless sections

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User eXperience

3. Most important is **USER**'s point of view (**NOT OURS**)

We all tend to have an opinion on UX… but our opinion is worth (nearly) nothing:

sometimes "small details" (that we don't even 'see'/anticipate) make users' life so hard/uncomfortable…

these are the details we want to catch/correct

Example: I may "personally" prefer the "tabs" layout for Family overview

vertical sections moved into tabs

… but what if users used to take a screenshot of the overview to record in a folder/other system,…
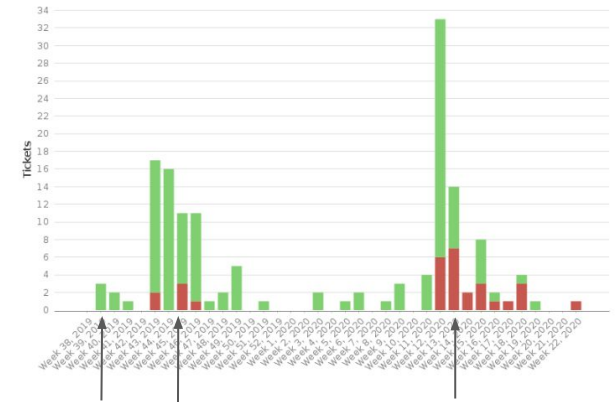
User eXperience

4. We don't really have **time/budget** for it... but it can (and already has) hit us back

For claim module, 'real' UI feedback came with Nepali workshop 02/2020, leading to several changes... **and not the smallest**:

- opening claims in dedicated tabs
- region -> district -> HF pickers ('autosuggest')
- ...

... and some are now considered as 'nice to have'

June: claim mockups in wiki...   Sept.: claim deployed on demo   Feb.: Nepali workshop & April release

Nov. : Addis Ababa

User eXperience

5. Showing screens to users early is a **"Sword of Damocles"**

It allows to 'involve' users in the process (and clearly to facilitate later software adoption,…)

… but may lead to a **"Pandora box"** situation (which we can't afford)

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openIMIS – UX

With the claim migration, some 'choices' have already been made:

- ○ 'flat table' look (as opposed to 'cards')

- ○ 'straight' access to all fields (as opposed to 'expendables')

    consequence: heavy screens

- ○ Use text instead of icons: need for icon pack ($), more explicit,...

- ○ Some generic components in place (async. processing -> Journal)

- ○ About actions:

    - ■ Fab icon button for main action

    - ■ Flat text button when limited options

    - ■ Text sub-menu for more actions

Insurees & Families

- Only the "main" screens have been mocked

- Very very close to existing screens… but:

  - actions 'relocated'

  - fields relocated to match the claim layout

  - proposed new "tabs" layout for the Family Overview

Family Overview

to fab

to "searcher" page
- row double click
- trash in the table row

"Location" fields relocated to match their 'usual' place (claim/…)

Family Overview 'tabs' alternative

https://zi3q2.csb.app/

https://ukd4e.csb.app/

Family/Group and Insuree pages

Family/Group page and Insuree page are **nearly the same**

https://vzsj9.csb.app/

https://cbmct.csb.app/

When displaying a Family, we display its 'head'
... while an insuree has a 'relationship' with the family (head)

... but should we keep it like that (should we display all family members as tabs in family,...)

Conclusion

- Insurees & Families (and, later on Policies, Contributions, …) migration to the new platform

  is an **opportunity** to address some UX 'concerns'

- UX is a **Pandora box** and could lead to serious budget impact

  … but ignoring it is not a solution either

- As a development team, we did screen mocks to help focusing on the essentials

  … and unless there are other suggestions this is what is going to be implemented

  BUT: feel free adapt the mocks (code is in the sandbox) and come with other proposals…

About schedule

analysis/ screen review periods

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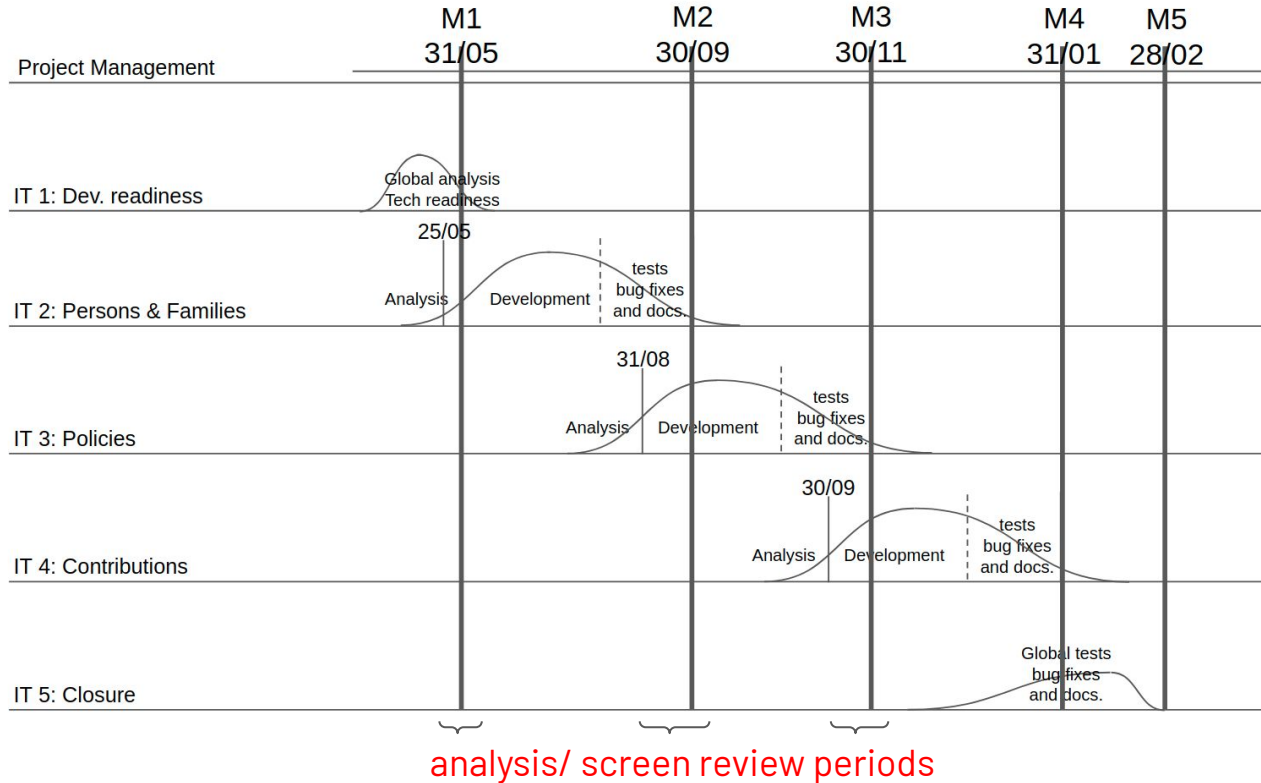
Thank you !

Bluesquare

www.bluesquarehub.com

info@bluesquarehub.com