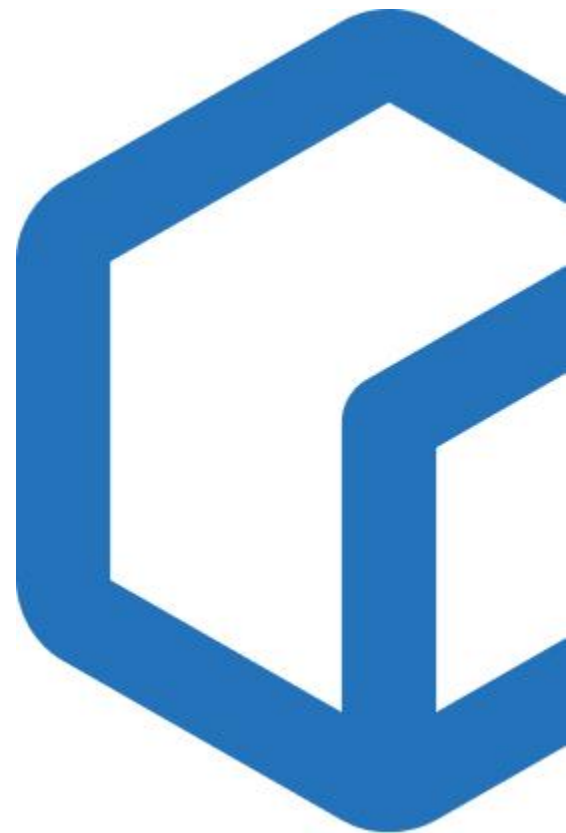


# openIMIS - UX review Insurees & Families

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!!

### openMIS October 2019 Software Update Release

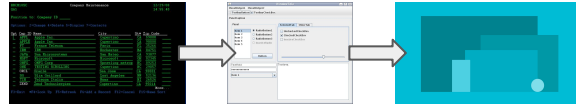
Just in time for Christmas, the openMIS Developer Committee announces the release of the October version of OpenMIS. Although we clearly missed the deadline, it was worth waiting: the new release contains most of the programming work that was invested into modularising the architecture of openMIS and 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 openMIS 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, RAHMNI, Odoo, DHIS2) to connect to openMIS 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' openMIS should not require intensive user trainings,...

- Modularity and **country customizations** induce variations

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

"Reference" enquiry dialog

Code	Name	Expiry Date	Status	Deduction	Hospital Deduction	Non Hospital Deduction	Ceiling	Hospital Ceiling	Non Hospital Ceiling	Balance
BCUL0001	Basic Cover Ultha	4/19/2021	2							0

added "contributions"

"Nepali" enquiry dialog

CHRID	Member Name	Phone
07070700	Joseph Macintyre (HEAD)	
070707081	Jane Macintyre	
070707082	Adile Macintyre	
070707086	Abu Macintyre	
070707089	Jet Macintyre	

Code	Name	Expiry Date	Status	Deduction	Hospital Deduction	Non Hospital Deduction	Ceiling	Hospital Ceiling	Non Hospital Ceiling	Balance
BCUL0001	Basic Cover Ultha	8/19/2020	2							0

removed  
useless  
sections

# 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

The image compares two UI designs for a 'Family/Group Overview' page. The left design uses vertical sections, while the right design uses tabs. A diagram with arrows shows the transition from the vertical sections to the tabs.

**Left Design (Vertical Sections):**

- Family/Group Details:** Region\* (R1 Litha), District\* (RID1 Raptia), Municipality\* (RID1M1 Achi), Village\* (RID1M1V1 Rachia), Insurance Number\* (3333232333), Last Name\* (Brook), Given Name\* (James), Poverty Status (checkbox), Confirmation Type\* (dropdown), Confirmation Number\* (JK46828482), Personal Address\* (Street\* (73W2), Location\* (dropdown)).
- Insurees:** Table with columns: Insurance Number, Last Name, Given Name, Gender, Birth Date, Beneficiary Card.
- Policies:** Table with columns: Endowment Date, Effective Date, Start Date, Expiry Date, Product, Endowment Officer, Policy Status, Policy Value, Valid From, Valid To.
- Contributions:** Table with columns: Payment Date, Payer, Amount, Payment Type, Receipt No, Contribution Category.

**Right Design (Tabs):**

- Family/Group Details:** Same as left design.
- INSUREES:** Table with columns: Insurance Number, Last Name, Given Name, Gender, Birth Date, Beneficiary Card.
- POLICIES:** Table with columns: Endowment Date, Effective Date, Start Date, Expiry Date, Product, Endowment Officer, Policy Status, Policy Value, Valid From, Valid To.
- CONTRIBUTIONS:** Table with columns: Payment Date, Payer, Amount, Payment Type, Receipt No, Contribution Category.

**Diagram:** A bracket on the left side of the right design groups the three tabs. Three arrows point from this bracket to the three vertical sections of the left design, indicating that the vertical sections were moved into tabs.

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

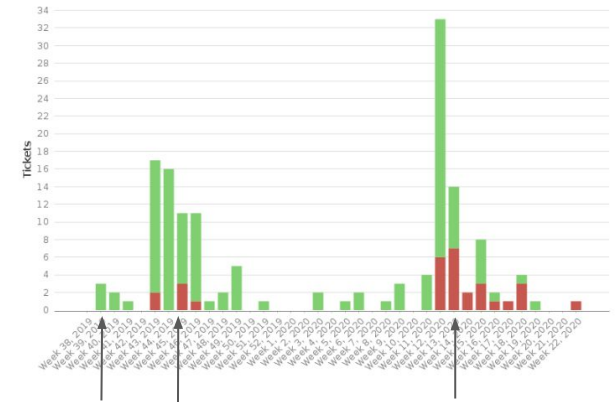
# User eXperience

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)

# openMIS - 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')
  - 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
- } consequence: heavy screens



# 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/...)

The screenshot shows the 'Family/Group' overview page. At the top left, there are three icons: a plus sign, a home icon, and a trash icon. A callout bubble points to these icons with the text 'to fab'. Below the icons, there are three red boxes highlighting the 'Region Ultha', 'District Jamboro', and 'Municipality Actoloby' fields. A callout bubble points to these fields with the text 'to "searcher" page' and a list: '- row double click', '- trash in the table row'. The main content area includes sections for 'Insurance', 'Policies', and 'Contributions'. The 'Insurance' section contains a table with columns: INSURANCE NUMBER, LAST NAME, MIXED NAMES, GENDER, BIRTH DATE, and BENEFICIARY CARD. The 'Policies' section contains a table with columns: ENROL DATE, EFFECTIVE DATE, START DATE, EXPIRY DATE, PRODUCT, ENROLMENT OFFICER, POLICY STATUS, POLICY VALUE, VALID FROM, and VALID TO. The 'Contributions' section contains a table with columns: Payment Date, Payer, Amount, Payment Type, Receipt N°, and Contribution Category.

The screenshot shows the 'Family/Group Details' page. At the top, there is a red box highlighting the 'Region\*', 'District\*', 'Municipality\*', and 'Village\*' dropdown menus. A callout bubble points to these fields with the text '"Location" fields relocated to match their 'usual' place (claim/...)'. Below the dropdowns, there are fields for 'Insurance Number\*', 'Last Name\*', 'Given Name\*', and 'Poverty Status'. The 'Insurance' section contains a table with columns: Insurance Number, Last Name, Given Name, Gender, Birth Date, and Beneficiary Card. The 'Policies' section contains a table with columns: Enrolment Date, Effective Date, Start Date, Expiry Date, Product, Enrolment Officer, Policy Status, Policy Value, Valid From, and Valid To. The 'Contributions' section contains a table with columns: Payment Date, Payer, Amount, Payment Type, Receipt N°, and Contribution Category. At the bottom right, there is a button labeled 'Open Sandbox'.

# Family Overview 'tabs' alternative

<https://zi3q2.csb.app/>

< Family/Group Overview

Family/Group Details

Region\* R1 Ultha District\* RID1 Rapta Municipality\* RID1M1V1 Achi Village\* RID1M1V1 Rachla

Insurance Number\* 333232333 Last Name\* Brook Given Name\* James  Poverty Status

Confirmation Type\* Municipality Confirmation Number\* JLKAS38947 Permanent Address Details\* Street n°12 73892 - Location

Insurees

Insurance Number	Last Name	Given Name	Gender	Birth Date	Beneficiary Card
172389HK9	Brook	James	Male	05/03/1997	<input type="checkbox"/>
7892389HK	Brook	Elisabeth	Female	12/02/1999	<input type="checkbox"/>

Policies

Enrolment Date	Effective Date	Start Date	Expiry Date	Product	Enrolment Officer	Policy Status	Policy Value	Valid From	Valid To
19/05/2020	19/05/2020	19/05/2020	19/05/2020	BCUL0001	JH001 Jony Tanu	Active	10,000.00	19/05/2020	

Contributions

Payment Date	Payer	Amount	Payment Type	Receipt N°	Contribution Category
19/05/2020	Coffee Farmers Association	10,000.00	Cash	331333	Contribution

Open Sandbox

<https://ukd4e.csb.app/>

< Family/Group Overview

Family/Group Details

Region\* R1 Ultha District\* RID1 Rapta Municipality\* RID1M1 Achi Village\* RID1M1V1 Rachla

Insurance Number\* 333232333 Last Name\* Brook Given Name\* James  Poverty Status

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INSUREES POLICIES CONTRIBUTIONS

Insurance Number	Last Name	Given Name	Gender	Birth Date	Beneficiary Card
172389HK9	Brook	James	Male	05/03/1997	<input type="checkbox"/>
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Open Sandbox

# Family/Group and Insuree pages

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

<https://vzsj9.csb.app/>

<https://cbmct.csb.app/>

**Family Head Details**

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

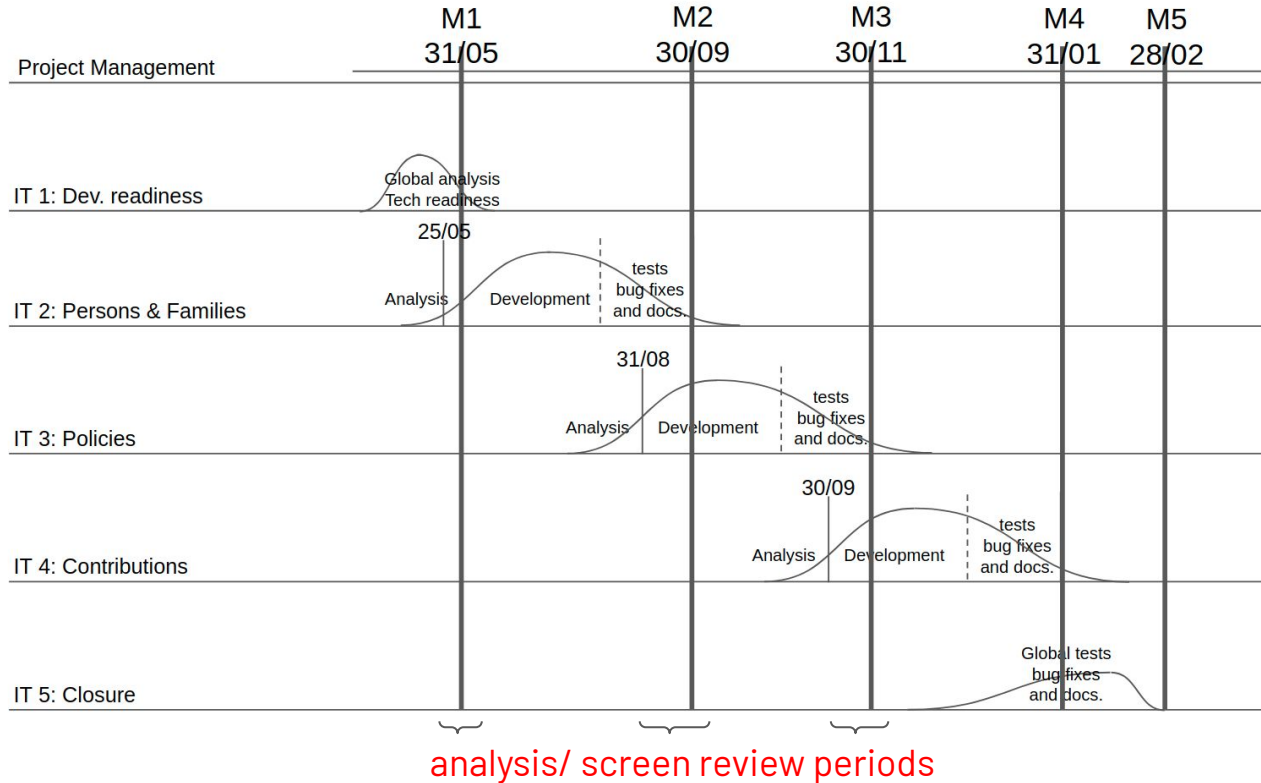
**Insuree**

... 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



# Thank you !



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