openIMIS

openIMIS Webinar: openIMIS Focal Point: Capacity building materials – Training of trainers
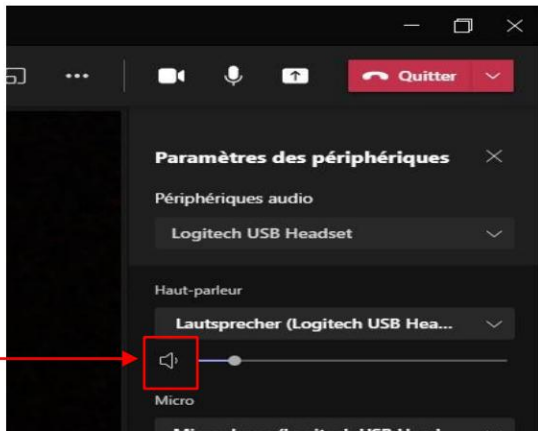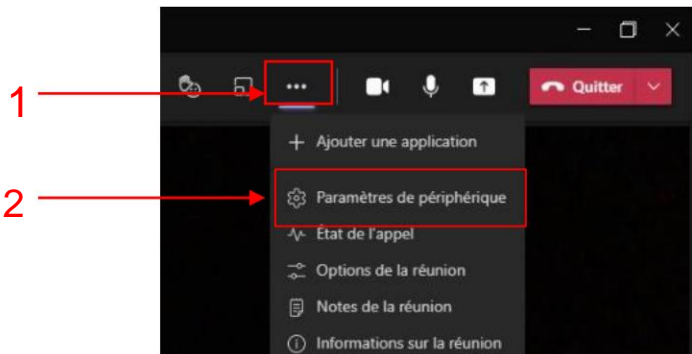
Toumai community

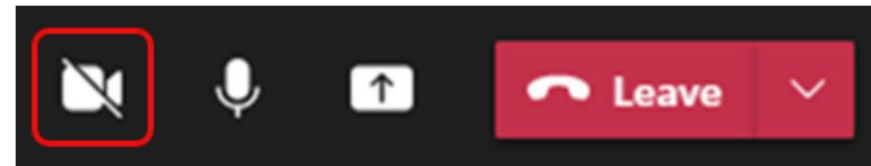June 21, 2022

● REC   **Please note that this session will be recorded!**

Put MS Teams on silent and disable video

You won't appear anywhere in the recording if you don't contribute

Webinar objectives

1. Present an "openIMIS focal point" approach in the countries

2. Present documentation and tools for capacity building capabilities of the openIMIS Initiative

3. Present the openIMIS train-the-trainer methodology

4. Share country experience

Speakers

Daniella Majakari, Swiss TPH

Daniella Majakari is a health financing project associate at the Swiss Tropical and Health Institute. She works on several types of health financing projects, including the implementation of the openIMIS insurance management information system, in Mauritania and Cameroon (Health Check & Backup Malaria project). She is also a capacity building specialist and contributed to the development of the new online course „Introduction to openIMIS" of the openIMIS Initiative.

Claudia KEBEFA, HIV user fee exemption program - Cameroon

Claudia is an openIMIS focal point at the Centre's Regional Health Promotion Fund, where she works as a support manager on the project to eliminate the payment of direct fees by PLHIV. She is also a quality controller and manager.

openIMIS Toumaï

Capacity Building Webinar:

Best practices for openIMIS user training

21.06.2022

Daniella Majakari, Swiss TPH & Claudia Kebefa FRPS Center Cameroon

Diary

Presentation of objectives
openIMIS focal point approach
Introduction to capacity building of the openIMIS Initiative
Review of capacity building materials
User training methodology and best practices
Sharing of experience of the HIV user fee program in Cameroon
Questions answers

openIMIS

Goals

The Toumaï community would like to improve the offer of capacity building tools in French to increase mastery of the openIMIS tool.

The objectives of this webinar are to:

1. Present an "openIMIS focal point" approach in the countries 2.

Present the documentation for the capacity building of the Initiative openIMIS

3. Present a generic approach to user training 4. Share country

experience

openIMIS Focal Point

openIMIS Focal Point: Why?

- A focal point is a person towards whom the
    openIMIS knowledge which is made available to the various
    openIMIS users

- It is a resource person to facilitate the training of end users in the country and
    assist users

- The focal point serves as a bridge between the global community and the
    national community

- The focal point facilitates the sharing of experience between
    communities in the same country or between countries

openIMIS Focal Point: Function Vs Role

A focal point is not considered by the openIMIS initiative as a
function, but a role.

The difference being:

• a role is played by someone in a particular situation of
  test or implementation of openIMIS

• whereas function is someone's duty which very often derives from a formal
  agreement

Someone who has an openIMIS function can play a point role
focal, but that is not a condition.

openIMIS Focal Point: Benefits

The focal point, through regular interaction with software users
and the various national and international communities, can propose:
• Changes to openIMIS requirements so that it better reflects

    needs

• Opinions on planned software changes

• Improvements to the openIMIS deployment methodology

Activities and documentation of an openIMIS Focal Point

Activities & documentation

Capacity building

"The Toumaï community is responsible for providing information and support to health financing programs – in a number of Francophone countries – that are preparing to implement or exploit the software.

The community also provides a platform for shared learning among insurance plan representatives from various countries. The Toumaï community is supported by the global openIMIS

initiative, which provides technical and institutional support. »

Community activities

Regular meetings	•Update on openIMIS projects •Experience sharing
Specialized webinars	•Deeper learning on specialized topics •Questions/ answers
Research/papers	•Specialized topics •Scientific approach to show the effects of digitalization and the use of openIMIS
Documentation/tools	•Provision of documentation to be used by members in their country •Tools that can be used for different activities of openIMIS implementation

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openIMIS Initiative Directory

Capacity Building Materials Directory: https:// openimis.atlassian.net/wiki/spaces/OP/pages/2306801665/Capacity+Building+Directory

openIMIS / openIMIS Community / Implementations

Share

Capacity Building Directory

Created by Daniella Majakari
Last updated: Jul 05, 2021 by Konstanze Lang • 1 min read • 21 people viewed

Here you find a directory of all available capacity building & training material related to openIMIS.

To add a capacity building tool to this list please simply use this form and update the title once published:

Template for capacity development

Link	Topic	Target group	Mode	Duration	Language	Latest update	No. participants
Introduction to openIMIS e-Learning Course	Introduction to openIMIS		e-Learning course	4 hours	EN	2022-05-05	NA
2022-01-12 Mannheimer Informatik-Kolloquium	Impact mit Informatik: Open-Source-Software im Gesundheitswesen in Afrika und Asien	IT Students	Webinar	60 min	DE	2022-01-12	50
openIMIS "Training of Trainers" in Mauritania	openIMIS general implementation training	Health insurance management staff	In-person	6 days	FR	07-11-2021	8
Toumai Community Meeting Self-Assessment of the feasibility of openIMIS	Feasibility assessment of openIMIS		Webinar	NA	FR	2021-06-16	
Digital Africa Gathering with 3 sessions by openIMIS initiative 2021	Sessions on "Engaging with diverse stakeholders to foster global communities of practice for opensource software", "Digital Global Goods - Killers or enablers?" and "Overcoming Digital Imperialism"			NA	EN		

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Examples of documentation

- Descriptions and PDF materials of Toumai meetings
  (FR): https://openimis.atlassian.net/wiki/spaces/OP/pages/2758344752/Session%2B1-
  %2BUse%2Bd%2BopenIMIS

- IT Installation Guide (EN): https://
  openimis.atlassian.net/wiki/spaces/OP/pages/786104344/Installation+and+Country+Location

- Feasibility tool (EN/FR): https://
  openimis.atlassian.net/wiki/spaces/OP/pages/3313369098/Etapes+de+Faisabilit

- Costing tool (EN/FR): https://
  openimis.atlassian.net/wiki/spaces/OP/pages/3313532937/Outil+de+Calcul+des+Co+ts+openIMIS

- Implementation steps (EN/FR): https://
  openimis.atlassian.net/wiki/spaces/OP/pages/3312844815/Etapes+de+Mise+en+Place+d+openIM
  IS

- Communication Strategy (EN): https://
  openimis.atlassian.net/wiki/download/attachments/589463708/Communicationstrategy_Draft_2
  .3.docx?api=v2

New documentation

• Translation of existing documentations/tools into English •

Toumai webinars on other important topics • Research/articles

Identify what are the missing elements for a focal point

Review of capacity building materials

Focal Point Guide

OpenIMIS Focal Point Guide

1. General introduction to openIMIS
   - E-Learning Course "Introduction to openIMIS" (EN)
   - Training Resources Videos

2. How to use the software
   - Demo server (FR/EN)
   - Demo server script
   - openIMIS Documentation/User Manual (EN/FR)

3. Implementation of openIMIS
   - Implementation steps (EN/FR)
   - Feasibility study tool (EN/FR)
   - Tool for cost estimation (EN/FR)
   - Communication Strategy

4. How to install and maintain the software (IT)
   - Installation & Customization Guide
   - Developer Starter Kit

5. Know how to train users
   - Generic approach to user training (EN/FR)

1. General introduction to openIMIS

E-Learning Course "Introduction to openIMIS" (EN):
Modular online course that gives an overview
overview of the software and the global community
https://socialprotection.org/introduction-openimis

Training Resources Videos
Online video that gives an introduction to the
functionalities of openIMIS (version 1, history)
https://www.youtube.com/watch?v=i7-msEBdtk4

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2. How to use the software

Demo server (FR/EN):
Demo version of openIMIS with open access http:// demo.openimis.org/
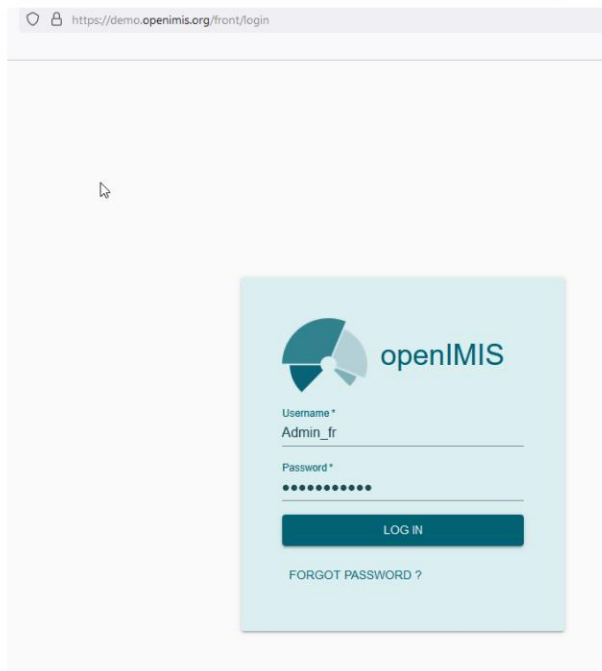
openIMIS / ... / Generic Implementation Starter Kit

Demo Server Script

Created by tabea.boateng
Last updated: Mar 30, 2020 · 4 min read · 16 people viewed

Demo Server 1

- At the start, first log-in by using the "by default" provided log-in data.
- After click on the "log in" button.
- You are navigated to the main page.
- Here you can choose "Insurees and Policies", "Claims", "Administration", "Tools" and "Profile".
- In this demo we start with selecting "Insurees and Policies" and begin with opening "Family/Group".
- It is required to select a "Region", "District" followed by "Municipality" and "Village" from a predefined table for the catchment area of the operator.
- It is possible to choose if a "Poverty status" is applicable.
- The poverty status typically is confirmed by the municipality which is selected in this example of choices and the group type in this demo is a "household".

Demo server script:
Script to follow to
train on the demo server

Demo Server Script
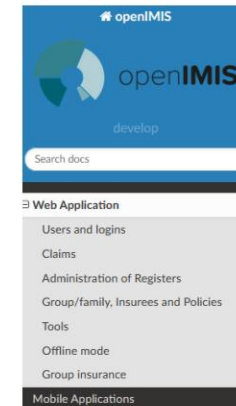
openIMIS Documentation/User Manual (IN FR):

Detailed user manual for each

feature

https://docs.openimis.org/fr/la test/

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3. Implementation of openIMIS

Tool for estimating costs (EN/FR):

Tool to estimate the costs incurred by setting up of openIMIS in a country

Calculation Tool openIMIS costs
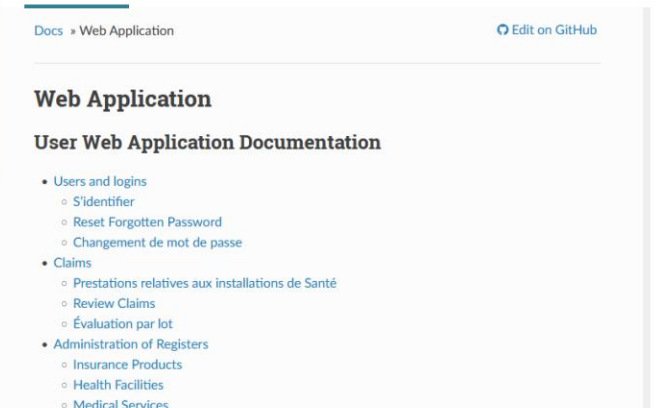
Implementation steps (EN/FR):
Description of how to set up openIMIS in a country
OpenIMIS Implementation Steps

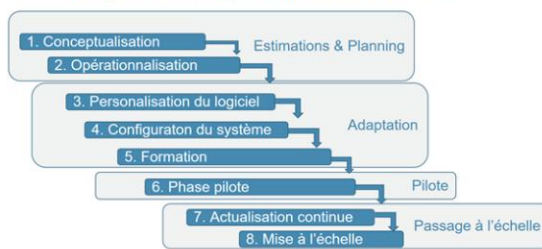openIMIS / ... / French Implementation Resources

Etapes de Faisabilité

DM Created by Daniella Majakari
Last updated: May 25, 2022 · 3 min read · 2 people viewed

OBJECTIF GÉNÉRAL

Evaluer la faisabilité de l'utilisation d'un système d'information ne nécessitant pas de licence (« open source » : openIMIS) dans la gestion des systèmes d'assurance afin de renforcer et de systématiser la gestion et le suivi de l'opérateur du régime.

openIMIS / ... / French Implementation Resources

Etapes de Mise en Place d'openIMIS

DM Created by Daniella Majakari
May 25, 2022 · 11 min read · 2 people viewed

Le diagramme ci-dessous présente les étapes de mise en œuvre recommandées et l'ordre dans lequel elles sont utiles. Les huit étapes sont décrites avec plus de détails ci-dessous.

Etapes de mise en œuvre – Vue d'ensemble

1. Conceptualisation
2. Opérationnalisation
   Estimations & Planning
3. Personalisation du logiciel
4. Configuraton du système
   Adaptation
5. Formation
6. Phase pilote
   Pilote
7. Actualisation continue
   Passage à l'échelle
8. Mise à l'échelle

Feasibility study tool (EN/FR):

Description of how to make a feasibility study for the use of openIMIS

Feasibility Steps

OpenIMIS Outil de calcul des coûts	Estimation de l'investissement nécessaire pour		Date			
Nom du projet	<indiquer le nom de projet>					
Responsable du projet	<indiquer le nom de répondant>					
Remarques	<Si nécessaire>					
		Unité	Coût par unité (in USD)	Coût total (en USD)	Indication de la nécessité	Commentaires
Coûts ponctuels						
1	Analyse du schéma (y compris l'informatique)	Journées personnelles		$0.00	REQUIRED	
2	Développement du logiciel	Journées personnelles		$0.00	Needed	Nécessité établie après l'analyse du régime
3	Prototypage et test des logiciels	Jours-personnes		$0.00	Needed	Nécessité établie après analyse du système
4	Espace de bureau	Rénovation	1	$0.00	Not Needed	Ajouter un élément de coût lorsque des réparations sont nécessaires
5	Formation (pour les admin	Veuillez remplir une feuille séparée sur la formation des utilisateurs du déploiement		$0.00	REQUIRED	
6	Matériel informatique	Jeux d'ordinateurs		$0.00	Needed	Spécifier les unités supplémentaires nécessaires Ajouter un élément

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4. How to install and maintain the software

Installation & Customization Guide:

Detailed description of how to install and customize the software to the needs of the country

Installation and Country Location

Developer Starter Kit:

IT Basics Videos for install and maintain software

Developer Starter Kit

5. Know how to train users

Generic approach to user training (EN/FR): Generic
slides that can be used when preparing a training https://openimis.atlassian.net/
wiki/spaces/OP/pages/589463708/Generic+Implementation+ Starter+Kit#A.-- Introductory-
training-modules-in-online-format

A. Introductory training modules in online format

	Materials	Content	Audience/ key staff	Delivery Design
1	Generic Training Approach	Conduct of schematic analysis for openIMIS	Managers	Powerpoint slides (customisation required)
2	Training modules	Module 1: Introduction to OpenIMIS Module 2: Setting up and localising openIMIS platform	Managers & Users	Webinars (delivered by AeHIN) Powerpoint slides and video recordings of online trainings
3	Demo Server (Access Credentials)	Instruction in how to access the Demo Server to test the system	Users	Self-instructive text

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Training Methodology Users

Generic approach & best practices

Introduction

- Trainings – step 5 of the openIMIS implementation steps

- The goal is to train different actors on how to use the

   software to accomplish their tasks

- Fundamental step for a

   successful implementation of openIMIS

- Each training must be adapted to the country context
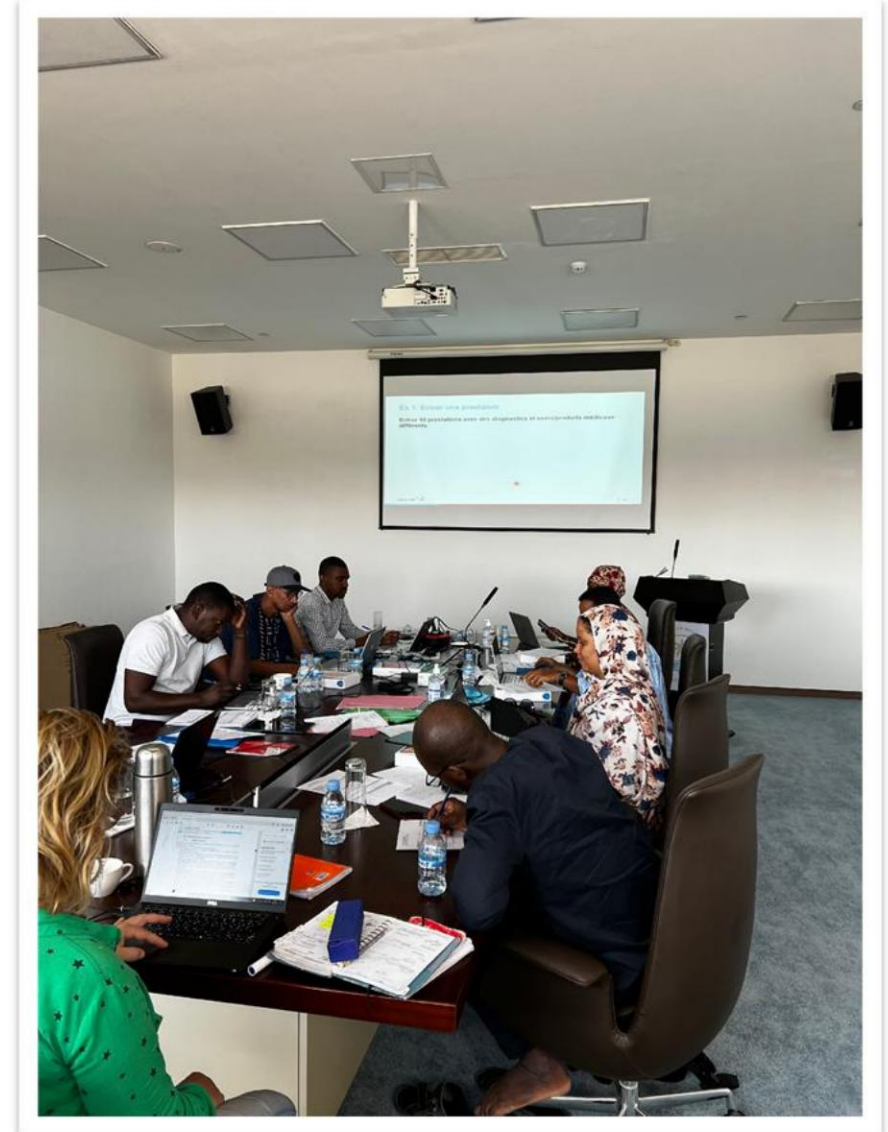
Actors to be trained

1. Server administrator(s) 2.
System administrator(s) 3. Plan
(insurance) staff

4. Health facility staff

Server administrators

IT training:

- Server management

- Security aspects

- Web service management

- Mobile application management

- Maintenance activities

System Administrators

Configuration training: •
Database management

- Registry management/openIMIS administration module
- Management of offline extracts
- Feature overview (user troubleshooting)

(insurance) scheme staff

Training by actors:

- Affiliate Agents
- Medical advisors/medical controllers
- Regional staff (openIMIS focal point)
- R.A.F.
- Etc…

FOSA staff

Training by FOSA:

- Receptionist/secretary

- Refund manager

- Doctor

Key questions for the organization

- Which groups should be formed? (affiliation agent, reimbursement managers, consulting physicians, etc.)

- How many health facilities should be formed?

- How many users per group should be trained?

- How many people can be trained per session?

- What materials are needed? •

What is the budget per training/cohort?

standard content

1. Introduction to openIMIS

2. Organizational structure

3. Roles and Responsibilities

4. Data reporting in openIMIS

5. Administration of openIMIS

6. Procedures:

- Membership
- Support at the FOSA
- Benefit/Reimbursement Request and Verification
- Renewal
- Reporting/indicators
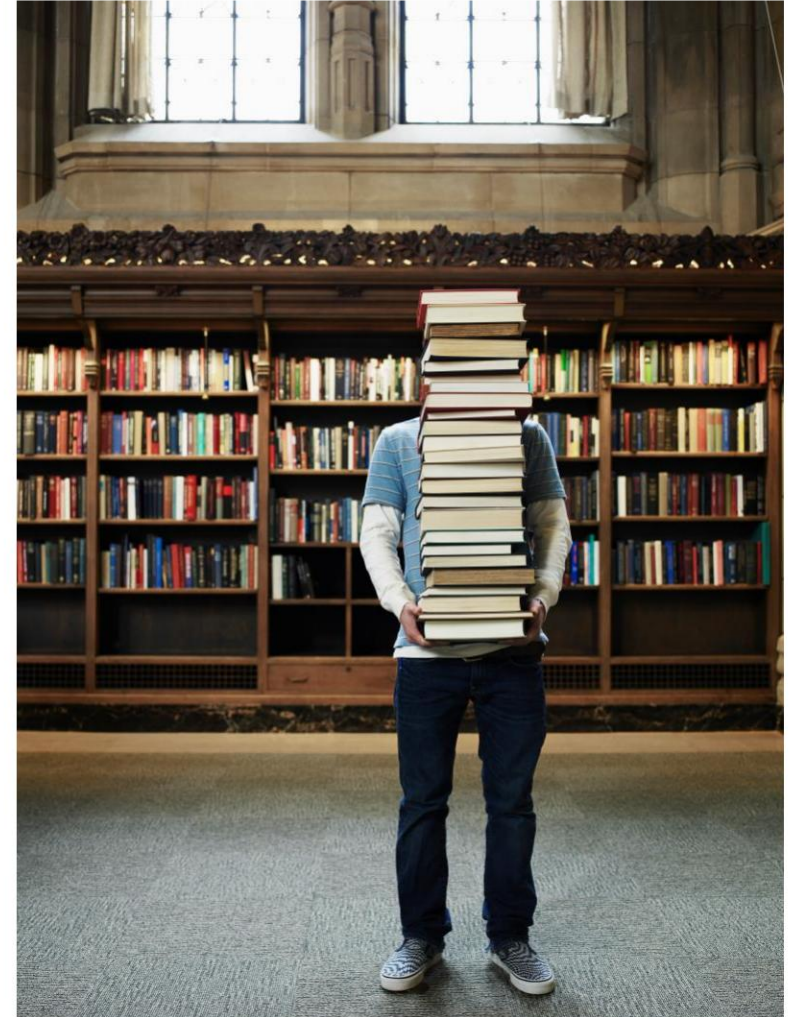
Standard methodology

- Procedure:

  1. Theory

  2. Demonstration

  3. Practical exercises

- 15-20 people per cohort max. •

Separate the trainings according to the roles and explain the
interaction with other roles

- Focus on the parts that are relevant for each
  groups

- Use training materials as needed

Importance of practical exercises

- Practical exercises give
  the opportunity for participants to
  take ownership of the tools and ask
  questions

- Practice the processes from start to finish,
  using all tools (paper and digital)

- Examples: role play/scenario, quiz, etc.
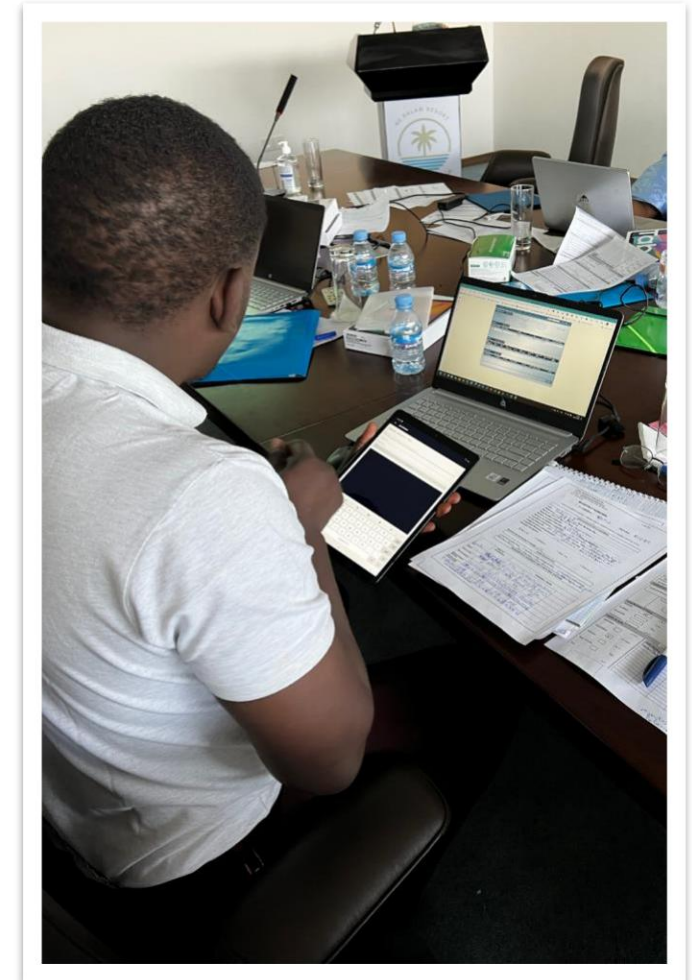
openIMIS Technical Support

Example of a technical support structure:

Level	Contents	Personal	Tools
1	User troubleshooting	Regional Whatsapp team, phone call…	
2	IT Support	Coordination team	Jira, whatsapp, phone call…
3	Expert support	openIMIS experts Zoom chat, Skype chat…	

Experience sharing

Cameroon HIV user fee exemption program

HIV User Fee Exemption Cameroon

Introduction

- Cameroon has made a commitment to improve the response to HIV infection and to significantly reduce this pandemic.

- Since January 1, a project to eliminate the payment of direct fees by people living with HIV SISA (PLHIV).

- A series of services provided free of charge in public establishments and community sites for HIV testing and treatment

HIV User Fee Exemption Cameroon

Introduction

- Ill-defined operational processes and inappropriate tools for the implementation of the project may, however, lead to unintended effects and compromise the expected positive effect of the political decision;

- The MINSANTE identifies openIMIS as a solution that, when configured , can meet operational processes as defined by the standard operating procedures (SOPs) of Cameroon's free HIV services program.

HIV User Fee Exemption Cameroon

Introduction

- Financial and technical support from GIZ for the pilot implementation of the openIMIS software for the project HIV user fees;

- 55 FOSAs from the Center region and 40 FOSAs from the North-West region were selected and trained for the pilot implementation of the openIMIS software.

openIMIS Focal Points

- Center region openIMIS focal point (at FRPS): •
  Check reimbursement requests

  - Send service invoices to the FOSA
  - Train users & continue capacity building • FOSA openIMIS

focal points: • Register beneficiaries

  - Enter service data
  - Submit recorded service data to FRPSC
  - Extract the invoices received by the FRPSC

Corporate training

- Trainers were trained at central and regional level on the openIMIS software;

- These trainers supported the training of the focal points of 55 pilot FOSAs in the Center region and 40 FOSAs in the North-West region
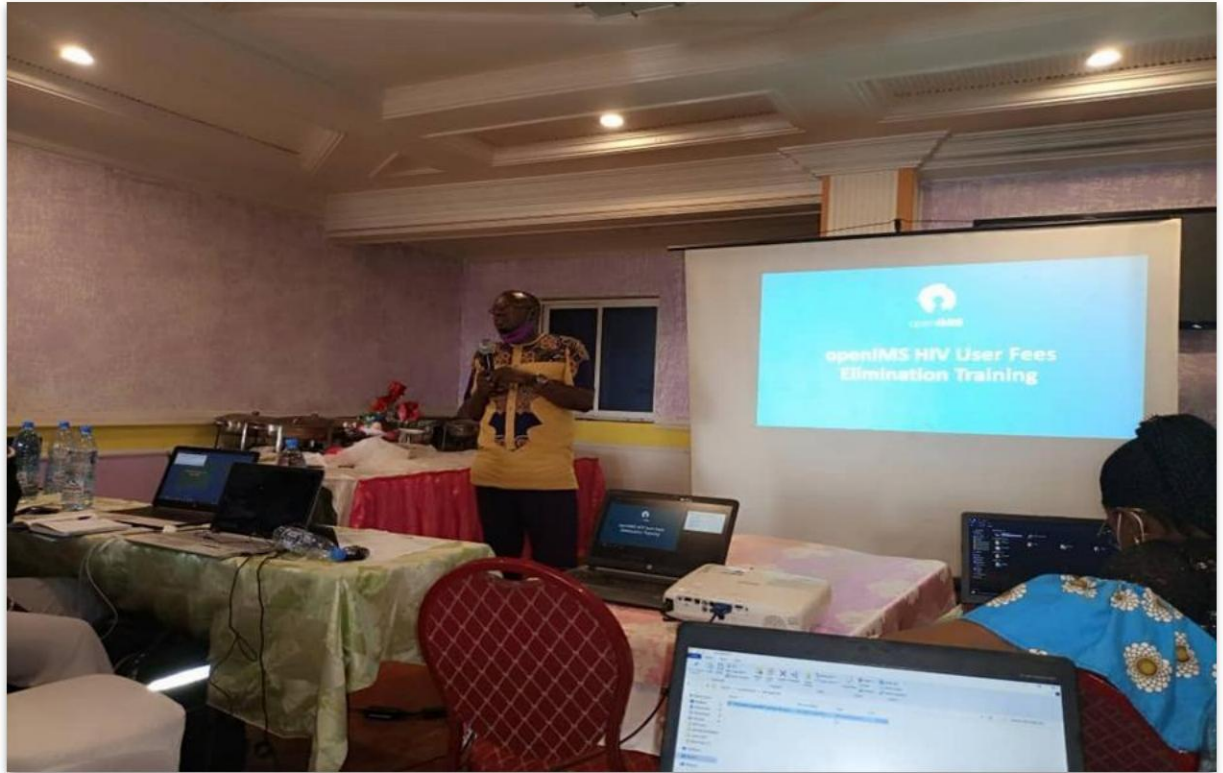
Mid-term evaluation

The openIMIS platform was used in 27 pilot FOSAs out of the initial 55.

I. CAUSES

• The low level of mastery of the openIMIS platform within the FOSA

• The lack of computers within the FOSAs to inform the services

Mid-term evaluation

I. CAUSES

- The number of people with reduced capacity within health facilities;

- The lack of motivation of the ACRRs to fill in the

    data in the platform;

- The lack of internet connection at the health facilities to access the

    platform.

Mid-term evaluation

II. CORRECTIVE MEASURES

1. Coaching (side by side) / supervision of pilot health facilities.

2. Writing an OpenImis procedures manual

Mid-term evaluation

Drafting of an openIMIS procedures manual/Guide for the openIMIS focal point in health facilities

III. METHODOLOGY

- Who: Who is concerned? (The performers, their qualification)

- What: What is it? (Object, operation, nature, etc.)

- Or: Where does it happen? (The place of execution of the operation)

- When: When does this happen? (Duration, frequency…)

- How: How do we proceed? (The method, the material…)

- Why: Why is this happening? (The reasons for such operations are
    carried out …)

openIMIS Procedures Manual

01 OPENIMIS PLATFORM CONNECTION PROCEDURE

02 PROCEDURE FOR ADDING A BENEFICIARY

03 SERVICE PACKAGE ASSIGNMENT

04 CONSULT THE LIST OF BENEFICIARIES

05 RECORDING OF CARE BENEFITS

06 PROCEDURE FOR VERIFICATION OF RECORDED SERVICES

07 SUBMISSION OF SERVICES OFFERED

08 REPORTING PROCEDURE

openIMIS Procedures Manual

Example: **01 OPENIMIS PLATFORM LOGIN PROCEDURE:**

Mid-term evaluation

3. The provision of computers to the parties involved in the implementation of openIMIS in the Center Region.

Conclusion

- The methodology used has enabled us to increase the number of FOSAs using this software effectively,

- The implementation of the openIMIS platform, with the support of technical and financial partners, will ultimately not only provide visibility of the production of health facilities via digital, to have disaggregated data, but also to facilitate the reimbursement of health facilities within the framework of the exemption from payment of direct costs for people living with HIV-AIDS.

Thanks!