

# openIMIS

User involvement in modules development



# Agenda

Followed development team methodology (decided @Workshop 02/2019)

(Fixed) Claim Module Scope

UX/UI

(Acceptance) Tests & Documentation

Decisions and Actions Items



# Followed development methodology

Each iteration delivers a fully functional product (*deployed in production*).

## Benefits

- Minimize risks
  - ease user adoption
  - technical (data migration,...)
- Each iteration can be an end on itself

## Drawback

- Higher (global) cost
  - ... and high cost is a risk
- ... living in a house being refitted



# Iterations (horizon 12/2019)

Iteration I : FHIR API // system integration, no user involvement

>> <https://openimis.nepalehr.org>

Iteration II (05/2019): “All proxies” setup // no real added value for user

Iteration III (09/2019): Claim module... **starting NOW!** (this is the topic of this meeting)

Iteration IV (12/2019): ‘Other module’ // user involvement is necessary



# Iteration II - expected users (representatives) feedback

- Ability to work with proxied screens
  - global screen layout, size, menu drawer,...
  - screen resizing and scrollbars,...
- Main Menu structure
  - “Administration” and “tools” are ‘catchall’ menus!
- Icons choices
- Additional (technical) benefits:
  - Procedures to setup (and later upgrade) the new openIMIS: how to secure, documentation,...
  - (new) Platform stability: how to monitor, troubleshoot, ...

**.... and this without (real) risk!**



# Iteration III: (Fixed) Claim Module Scope

In scope: <https://openimis.atlassian.net/wiki/spaces/OP/pages/807632949/Claim+module+scope>

- Claim control (overview)
- Claim Entry
- Claim Review & Claim Feedback
- Claim Valuation (batch)
- Claim Operational Report

Extensions proposed by Swiss TPH (to be added to scope... *if we have time/budget*)

- User preferences to save default filters
- User tasks management (...without going BPEL)
- Rule-based (claim) validation (transitions?)



# Iteration III - Claim Module UX/UI

## Disclaimer:

The proposed screens are NOT the result of a proper UX/UI design work.

Their sole purpose is to illustrate what could be addressed by such a work.

The two 'flavors' presented ('airy' / 'compact') are only to illustrate the purpose...



# Claim search (MainMenu - Health Facility Claims)

Home Insurees and Policies Claims Administration Tools My profile Logout Enquiry

### Select Criteria

Claim Details

Region:  HF Name:  Visit Date From:  To:

District:  Review Status:  Claim Date From:  To:

HF Code:  Feedback Status:  Main Dg.:

Claim Administrator:  Claim Status:  Batch Run:

Insurance Number:  Claim No.:  Visit Type:

### 2 Claims Found

CLAIM NO.	HF NAME	DATE CLAIMED	FEEDBACK STATUS	REVIEW STATUS	CLAIMED	APPROVED	CLAIM STATUS
<a href="#">CIB00001</a>	Juiloa Health Centre	22/12/2018	Idle	Idle	1,000.00		Entered <input checked="" type="checkbox"/>
<a href="#">CID00001</a>	Viru Dispensary	03/01/2019	Idle	Idle	1,670.00		Entered <input type="checkbox"/>





# Claim search (Health Facility Claims)

The screenshot displays the openMIS web application interface for searching Health Facility Claims. The interface is divided into a left sidebar and a main content area.

**Left Sidebar:**

- Insurees and Policies (dropdown arrow)
- Claims (dropdown arrow)
- Health Facility Claims (selected)
- Review
- Batch Run
- Administration (dropdown arrow)
- Tools (dropdown arrow)
- Profile (dropdown arrow)

**Main Content Area:**

- Header: openMIS, Select category..., Enter Keywords, Search icon, and a square icon.
- Section: Select Criteria (with search icon and menu icon)
- Filters: Claim date after 03/01/2018, Claim date before 05/01/2018
- Results (3 items):
  - Item 1: 03/01/2018, CIB00001, Juiiõa Health Centre. Status: checked. Actions: delete, play, edit.
  - Item 2: 03/01/2018, CID00001, Viru Dispensary. Status: checked. Actions: delete, play, edit.
  - Item 3: 03/01/2018, CID00001, Viru Dispensary. Status: warning. Actions: delete, play, edit.
- Bottom right: A large teal circular button with a white plus sign (+).



# Claim search (Health Facility Claims)

The screenshot displays the openIMIS interface for Health Facility Claims. On the left, a sidebar contains navigation items: 'Insurers and Policies', 'Claims', 'Health Facility Claims', 'Review', and 'Batch Run'. The main content area features a 'Select Criteria' dialog with filters for 'Claim date after 03/01/2018'. A 'Change Filter Criteria' modal is open, showing filters for 'LOCATION' (Region: Ultha, District: --select--), 'STATUS', 'CONTENT', and 'DATES'. A search bar is visible at the top right, and a context menu is open over it with options: 'Select All', 'Submit selected', and 'Delete selected'.

# Claim search (Health Facility Claims)

openMIS

Select category...

Enter Keywords

Select Criteria

Claim date after 03/01/2018

Claim date before 05/01/2018

Claim No.	HF Name	Date Claimed	Feedback Status	Review Status	Claimed	Approved	Claim Status	+	
CIB00001	Juiõa Health Centre	22/12/2018	Idle	Idle	1,000.00		Entered	<input type="checkbox"/>	
CID00001	Viru Dispensary	03/01/2018	Idle	Idle	2,920.00		Entered	<input type="checkbox"/>	



# Claim edit (on claim 'load')

Home Insureds and Policies Claims Administration Tools My profile Logout Enquiry

Claim Details

HF Code: VIDS001 HF Name: Viru Dispensary Visit Date From: 03/01/2019

Insurance Number: 105000002 Patient Name: Doni Iilina Visit Date To: 03/01/2019

Main Dg: A009 Cholera, unspeci Claim No: CID00001 Date Claimed: 03/01/2019 Claimed: 1,670.00

Sec Dg1: Sec Dg2: Sec Dg3: Sec Dg4:

Claim Administrator: VIDS0011 Guarantee No: Visit Type: Other

Services 10

SERVICE CODE	QUANTITY	PRICE	EXPLANATION
A1 General Consultation	1.00	400.00	
I113 BLOOD SUGAR-RAN	1.00	1250.00	
CODE NAME PRICE			
A1 General Consultation		400.00	
I113 BLOOD SUGAR-RANDOM OR FASTING		1250.00	
I117 BLOOD SLIDE FOR MALARIAL PARASITES (BS FOR MPS)		650.00	
I125 URINE ANALYSIS (ROUTINE)		650.00	
EXPLANATION			
0182 PARACETAMOL TAB	2.00	10.00	

Explanation

Save Add Print Cancel

Print

We'll create a printer-friendly PDF version of your report.

Page size: A4 (210mm x 297mm)

Page orientation: Landscape

Print Cancel

Home Insureds and Policies Claims Administration Tools My profile Logout Enquiry

Go back to selector.

Claim

HF Code: VIDS001 HF Name: Viru Dispensary

Insurance Number: 105000002 Insuree: Doni Iilina

Claim No.: CID00001 Claim Administrator: VIDS0011 - Juolpio Duikotau

Main Dg.: A009 Cholera, unspecified Guarantee No: Visit Type: O

Sec Dg1: Sec Dg2: Sec Dg3: Sec Dg4:

Services

Code	Name	Quantity	Price	Explanation	Free service price
A1	General Consultation	1.00	400.00		0.00
I113	BLOOD SUGAR-RANDOM OR FASTING	1.00	1,250.00		0.00

Items

Code	Name	Quantity	Price	Explanation	Free item price
0182	PARACETAMOL TABS 500 MG	2.00	10.00		0.00

Claim - Printed on: 6/12/2019 11:17:26 PM 1 of 1



Excel PDF Word

Claim Saved OK






# Claim edit / GENERAL

openIMIS

Select category... Enter Keywords.  

**GENERAL** SERVICES ITEMS

HF Code VIHC001	HF Name Juilöa Health Centre	Visit Date From June 13th 	
Insurance Number 105000002	Patient Name Doni Ilina	Visit Date To June 13th 	
Main Dg. A000 Cholera due to Vibrio c	Claim No. CIB00001	Date Claimed June 13th 	
Sec Dg1 A001 Cholera due to Vibrio c	Sec Dg2	Sec Dg3	Sec Dg4
Claim Administrator VIHC0011	Guarantee No.	Visit Type	

Claimed  
5.250

**Fields should be grouped (5 +/- 2 rule) !!**



PRINT SAVE

**Navigation:** Insurers and Policies, Claims, Health Facility Claims, Review, Batch Run, Administration, Tools, Profile



# Claim edit / SERVICES

openIMIS

Select category...   

Insurees and Policies

Claims

Health Facility Claims

Review


Batch Run

Administration

Tools

Profile

GENERAL SERVICES ITEMS

Service Code	Quantity	Price	Explanation
I26 BLOOD SLIDE FOR MALARIAL PARASITES (BS FOR MPS)	1.00	800.00	

I26 BLOOD SLIDE FOR MALARIAL PARASITES (BS FOR MPS)

- A1 - General Consultation
- I1 - BLOOD SUGAR - RANDOM OR FASTIUNG
- I125 - URINE ANALYSIS (ROUTINE)
- I127 - URINE FOR PREGNANCY TEST (UPT)
- ... ?? HOW MANY SERVICES ?? ...

PRINT SAVE



# Claim Review (MainMenu - Review)

Home Insurees and Policies Claims Administration Tools My profile Logout Enquiry

Select Criteria

Claim Details

Region: --Select Region-- HF Name: \_\_\_\_\_ Visit Date From: \_\_\_\_\_ To: \_\_\_\_\_  
 District: \_\_\_\_\_ Review Status: --Select Status-- Claim Date From: \_\_\_\_\_ To: \_\_\_\_\_  
 HF Code: ---Select HF Code--- Feedback Status: --Select Status-- Main Dg: \_\_\_\_\_  
 Claim Administrator: \_\_\_\_\_ Claim Status: Checked Batch Run: \_\_\_\_\_  
 Insurance Number: \_\_\_\_\_ Claim No.: \_\_\_\_\_ Visit Type: Select Type Search

Claim Selection Update

Criteria Details

--Select-- Random  % Value: \_\_\_\_\_ Variance  % Update

2 Claims Found Select To Process

CLAIM NO.	HF NAME	DATE CLAIMED	FEEDBACK	REVIEW	CLAIMED	APPROVED	CLAIM STATUS
UPDH0002	Uptol District Hospital	22/12/2018	Idle	Reviewed	21,010.00	10.00	Checked
CLA00001	Vida District Hospital	23/12/2018	Idle	Idle	11,810.00		Checked

Review Feedback Update **Process** Cancel

Home Insurees and Policies Claims Administration Tools My profile Logout Enquiry

UPHOS001 - Uptol District Hospital  
 Insurance Number: 101000003  
 Partient Name: Joseph Laly  
 Claimed: 21010.00  
 Main Dg: A238 Other shigellosis  
 Claim No.: UPDH0002  
 Date Claimed: 22/12/2018  
 Approved: 10.00  
 Sec Dg1: \_\_\_\_\_ Sec Dg2: \_\_\_\_\_ Sec Dg3: \_\_\_\_\_ Sec Dg4: \_\_\_\_\_  
 Date Processed: \_\_\_\_\_ Visit Date From: 22/12/2018 Visit Date To: 22/12/2018 Adjusted: 0.00  
 Claim Administrator: UHOS0011 Visit Type: Referrals Guarantee No: \_\_\_\_\_

Services

SERVICE CODE	QTY	PRICE	EXPLANATION	APP. QTY	APP. PRICE	JUSTIFICATION	STATUS	VALUATED R
M14-SUR In Growing The Nut	1	21000.00		0.00			Passed	0

Items

ITEM CODE	QTY	PRICE	EXPLANATION	APP. QTY	APP. PRICE	JUSTIFICATION	STATUS	VALUATED R
GIRO PARACETAMOL TABS 500 MG	1	10.00					Passed	0

Explanation: \_\_\_\_\_ Claim Status: Checked  
 Adjustment: \_\_\_\_\_  
 Save Cancel

Home Insurees and Policies Claims Administration Tools My profile Logout Enquiry

Claim

Claim Details

Claim No.: UPDH0002 Insurance Number: 101000003 Last Name: Laly Other Names: Joseph  
 HF Code: UPHOS001 HF Name: Uptol District Hospital Visit Date From: 22/12/2018 Claim Status: Checked  
 Claim Date: 22/12/2018 Visit Date To: 22/12/2018 Review Status: Reviewed Feedback Status: Idle  
 Claim Administrator: UHOS0011

Feedback

Enrolment Officer: --Select Enrolment Officer--  
 Care Rendered: --Select Yes/No--  
 Payment Asked: --Select Yes/No--  
 Drugs Prescribed: --Select Yes/No--  
 Drugs Received: --Select Yes/No--  
 Overall Assessment:  0  1  2  3  4  5  
 Feedback Date: \_\_\_\_\_  
 Save Cancel

IMIS

Would you like to process the claims?

Yes No

# Claim Batches (MainMenu - Batch Run)

Home Insurances and Policies Claims Administration Tools My profile Logout Enquiry

**Batch Processing**

Region **Ultha** District **Jambo** Month **June** Year **2019** **Process**

**Filter**

Type **Yearly** Year **--Year--** Period **--Period--**

Region **--Select Region--** District **--Select District--** Product **--Select Product--** Category **--Select category--** **Filter**

**Display**

No Results found

**Filter for Accounts**

Group By:  HF  Product  Show Claims

Region **--Select Region--** Product **--Select Product--** HF **--- Select HF Code ---** Level **-- Select Level--**  Show all

District **--Select District--** Batch **--Select Batch Run--** Date From  Date To  **Preview**

**Cancel**

**Result filtered successfully**

IMIS

Are you sure you want to process Batches for the current selection  
Jambero June 2019

**Yes** **No**

??

Home Insurances and Policies Claims Administration Tools My profile Logout Enquiry

Go back to selector

**Claim Remuneration**

All Claims		Remunerated
Jambero		
JM05001-Huda Dispensary Acc. Code :		
Product :		Remunerated
SCU0001-Basic Cover Ultha :		11,882.00
JM05001 Total :	JM05001 Total :	11,882.00
Jambero District Hospital Acc. Code : DL0002		
Product :		Remunerated
SCU0001-Basic Cover Ultha :		7,800.00
JM05001 Total :	JM05001 Total :	7,800.00
Region		
JM05001-Jambo District Hospital Acc. Code : DL0002		
Product :		Remunerated
SCU0001-Basic Cover Ultha :		432.00
LF05001-Open District Hospital Acc. Code :		
Product :		Remunerated
SCU0001-Basic Cover Ultha :		802.00
LF05001 Total :	LF05001 Total :	802.00
Total for Region :		1,234.00
Total :		20,000.00

Claim Remuneration - Printed on: 6/22/2019 11:58:11 PM 1 of 1

**Exit** **PDF** **Print** ??





# Agenda

Followed development team methodology (decided @Workshop 02/2019)

(Fixed) Claim Module Scope

UX/UI

(Acceptance) Tests & Documentation

Decisions and Actions Items



# Iteration III: Acceptance Criteria & Documentation

Existing (?) test plan to be extended

- claim features (business processes)
- link (dependencies) with all other modules
- link with other components (accounting, DWH,...)

Documentation

- user guides
- deployment / administration guides



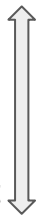
# Decisions / Actions Items

- Iteration II user (representative) involvement
  - Do we organise feedback session ? Who, How, When...
  - Do we aim production deployment ? Who, How, When...

- Iteration III (Claim module)

- UX/UI (re)design options:

Higher risks



- “Don’t”: stick as much as possible to existing (only colors/button shape/icons/...)
  - >> much in the direction of the illustrated ‘compact’ flavor
- By implementors committee (only): wireframes, icons, ...
  - >> delay may be absorbed (by prep. work)

Planning impact

- By implementors committee, with users involvement
  - >> existing feedback ?, timeframe?

- Acceptance criteria & Documentation