



open**IMIS**

# openIMIS installation and user manual

openIMIS team

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**v1.4.1**

The open Insurance Management Information System ( openIMIS ) is a web based software to manage health insurance schemes. It includes functionality for setup of the software to requirements of health insurance schemes, administration of policies and policy holders and for claim processing. This manual is a guide on the use and functionality of the software rather than in-depth technical reference. The Contents section, provide a reference to the page of each major chapter and the sub chapters within. By clicking on the content title (online version), the reader is re-directed to the position of the content title.

Welcome to the openIMIS technical documentation repository.

## 1.1 Users and logins

### 1.1.1 Login

To access the software, Users must have a valid User Name and Password, provided by the “IMIS Administrator”. In the browser address bar type the URL of the openIMIS instance to request the start page. Login page will appear (Img. 1.1.1).

The image shows a web form titled "IMIS Login". It has a blue header bar with the title. Below the header, there are two input fields: "Login Name" with the text "jiri" entered, and "Password" with masked characters (dots). Below these fields is a blue "Login" button. In the bottom right corner, there is a link that says "Forgot password?".

IMIS Login

Login Name jiri

Password .....

Login

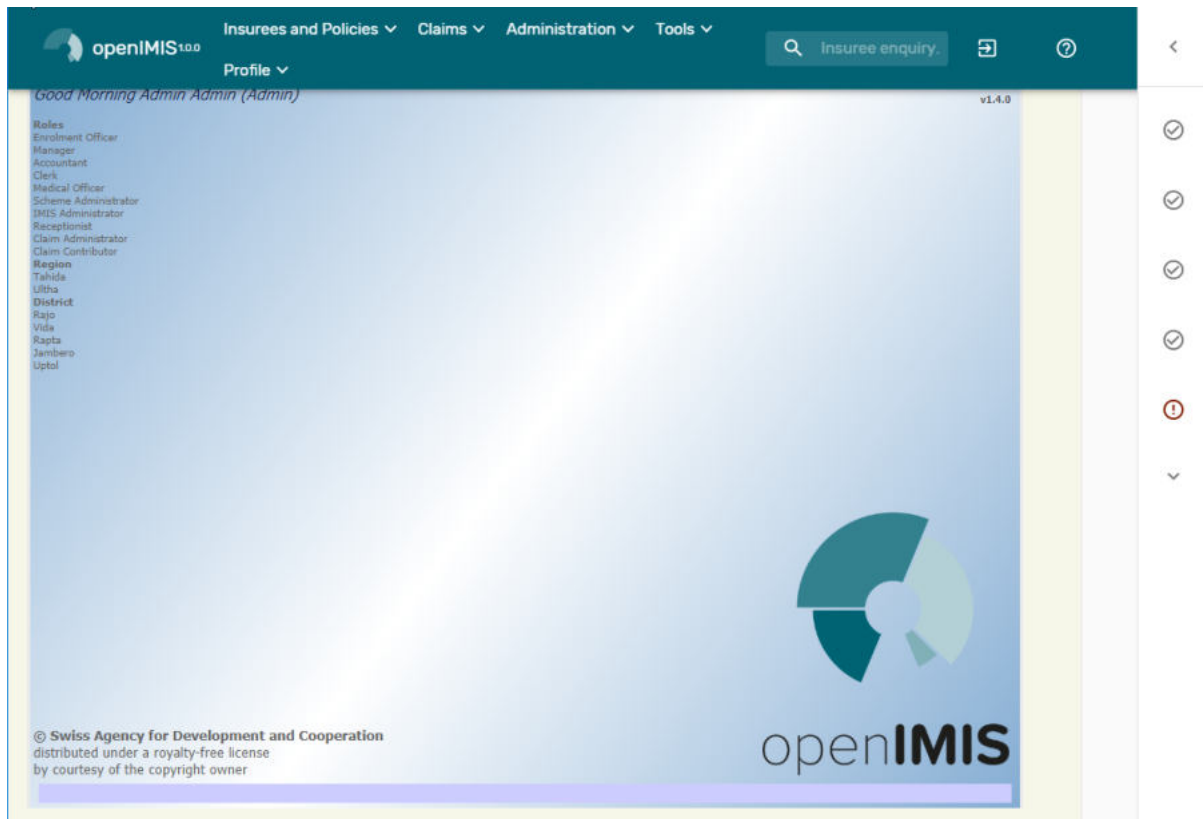
[Forgot password?](#)

Img. 1.1.1: *User Login*

Use the provided Login Name and Password, and click on the button Login. If successful, the system will re-direct to the Home Page (Img. 1.1.2).

The full menu is displayed. Clicking on the menu headers will display a sub-menu providing further navigation options. Only menu accessible to the user are displayed. Below the main





Img. 1.1.2: Home Page

menu at the top left-hand corner there is information about the current login user: Login Name, a list of roles acquired by the user and and the region the districts to which the user has access. Logins and roles assignment can be created in the *Users Administration page*, custom roles can be created and modified in the *User roles Administration Page*.

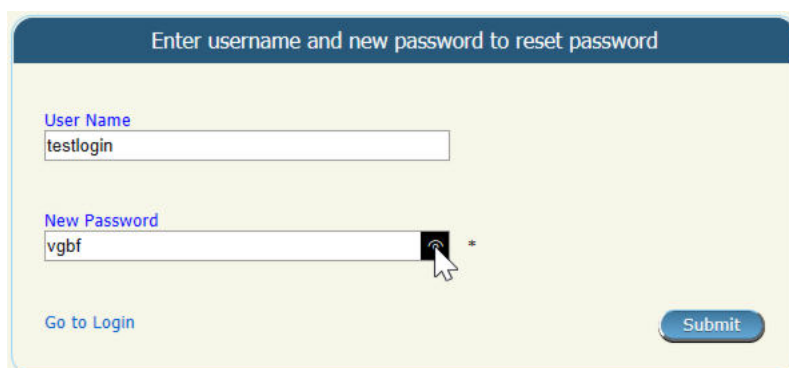
### 1.1.2 Forgotten password

When a password is forgotten, clicking **Forgot Password?** on the login screen (*Login*) results in the opening of the **Forgot Password** page (*Forgotten password image*).

Img. 1.1.3: Image - Forgot Password Page

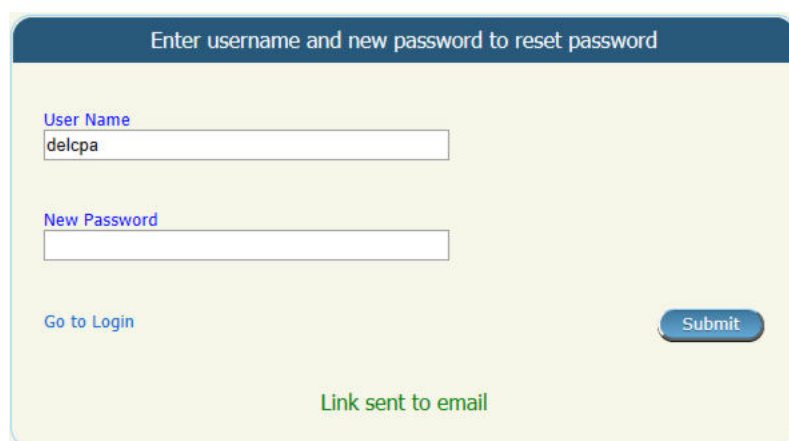
1. Enter the **User Name** linked to the account
2. Enter the **New Password**. In some browsers (i.e. Internet Explorer) it is possible to display the password entered by clicking on the eye in the right part of the password

text box (*New password displayed image*).



Img. 1.1.4: *Image - new password displayed*

3. Click on the **Submit** button. In case the **User Name** coincides with an user in the register of users, an e-mail will be sent to confirm the password change. (*New password confirmation sent image*).



Img. 1.1.5: *Image - New password confirmation sent*

4. Check the user's inbox and click on **Confirm password** link inside the received email with the subject **IMIS Password Request** then re-enter the data of the steps 1 & 2 (*New password confirmation image*).
5. Once the confirmation is submitted, the new credentials can be used in the *Login* page.

### 1.1.3 Password change

Any user can change his/her password by adjustment of his/her profile.

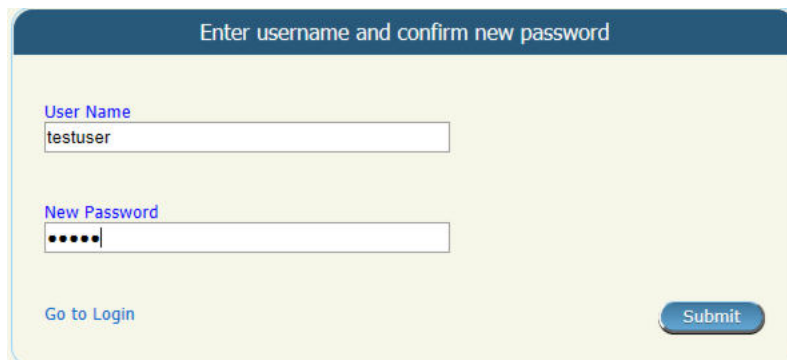
#### Navigation

Functionality for changing of a password can be done in the menu **Profile**, sub menu **Change Password**.

Clicking on the sub menu **Change Password** re-directs the current user to the *Change Password Page*.

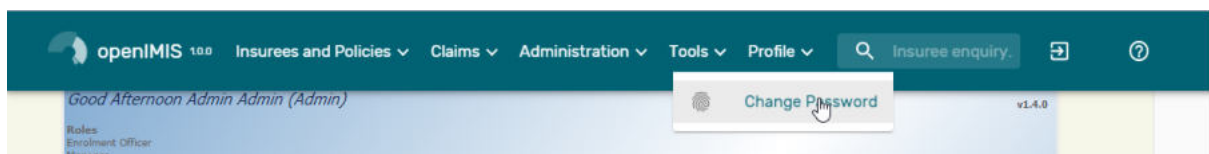
#### Change Password Page

##### 1. Data Entry

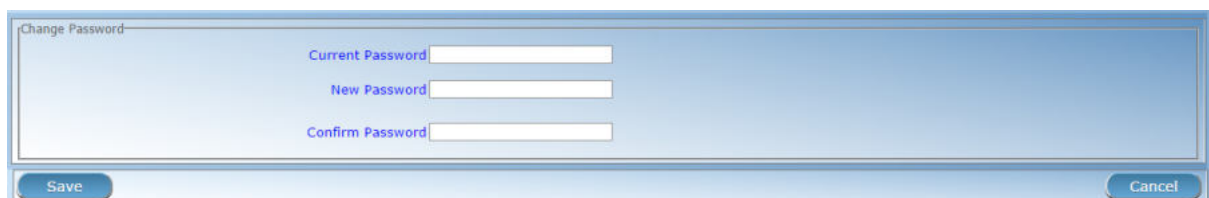


A screenshot of a web form titled "Enter username and confirm new password". The form has a light yellow background and a dark blue header. It contains two input fields: "User Name" with the text "testuser" and "New Password" with masked characters "•••••". Below the "New Password" field is a "Go to Login" link. A blue "Submit" button is located at the bottom right of the form.

Img. 1.1.6: Image - New password confirmation



Img. 1.1.7: Navigation Change Password



A screenshot of the "Change Password" page. The page has a light blue background and a dark blue header. It contains three input fields: "Current Password", "New Password", and "Confirm Password". A blue "Save" button is located at the bottom left, and a blue "Cancel" button is at the bottom right.

Img. 1.1.8: Change Password Page

- **Current Password**

Enter the current password of the logged in user.

- **New Password**

Enter a new password of the logged in user. The password should have at least 8 alphanumeric characters with at least one digit.

- **Confirm Password**

Repeat the new password of the logged in user.

## 2. Saving

Once all mandatory data are entered, clicking on the **Save** button will save the record. The user will be re-directed back to the [Home Page](#). A message confirming that the new password has been saved will appear at the bottom.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right side of the corresponding field).

## 4. Cancel

By clicking on the Cancel button, the user will be re-directed to the [Home Page](#)

# 1.2 Claims

The functionalities under the menu **Claims** allow complete processing of claims from their entering into IMIS, modification, submission to processing, automatic checking of their correctness, reviewing of them by medical officers, their evaluating and preparation of report to an accounting system for their remuneration to contractual health facilities. Each claim can be consequently in several states. Once it is entered to openIMIS (either by the mobile phone application **Claim Management** or typed in and saved in IMIS) it goes to the status **Entered**.

## 1. Claim entry and submission

When it is submitted and it successfully passes at least some automatic checks, the claim goes to the status **Checked**. If the claim doesn't pass automatic checking it goes to the status **Rejected** and its processing ends. The claim in the status **Checked** may be reviewed from medical point of view and/or a feedback on it can be collected from the patient.

## 2. Claim review: scrutinisation and feedback

Medical reviewing and feedback acquiring can be by-passed. Once such (manual) scrutiny of the claim is at the end, the claim may be pushed to the status **Processed**.

## 3. Claim valuation

In this status the claim is evaluated in nominal prices, taking into account all ceilings, deductibles and other cost sharing rules associated with insurance product or products covering claimed health care. If there is no medical service or medical item price of which a relative one according to the corresponding insurance product, the claim goes automatically to the status **Valuated**.

If there is at least one medical service or medical item with relative pricing, the claim goes to the status **Valuated** only after a batch for corresponding period is run. The batch for a period (month, quarter, year) finishes evaluation of relative prices on claims on one hand and summarizes all claims in the period for accounting system that is external to openIMIS (it is not a part of it).

## 4. claims values based on stage

Different values (prices) of a claim are associated with each stage of processing of claims. When a claim is entered the value of the claim based on nominal prices of claimed medical services/items

is designated as **Claimed Value**. **Claimed Value** is associated with the state **Entered**. The value of the claim after automatic checking of claims during submission of the claim and after manual interventions of medical officers is designated as **Approved Value**. **Approved Value** is associated with the state **Checked**. The value of the claim after corrections based on all cost sharing rules of covering insurance products is designated as **Adjusted Value**. **Adjusted Value** is associated with the state **Processed**. The final value of the claim taking into account actual value of relative prices is designated as **Paid Value**. **Paid Value** is associated with the state **Valuated**.

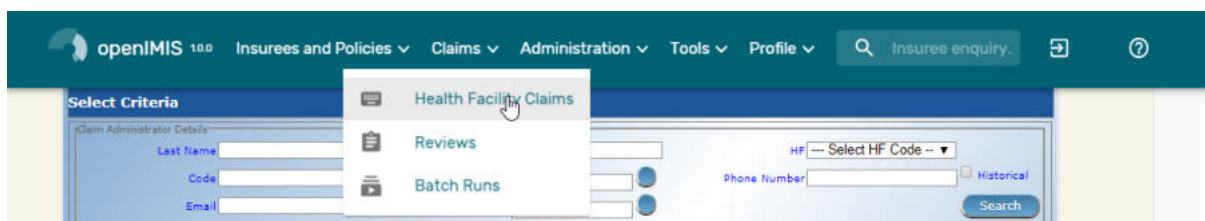
### 1.2.1 Health Facility Claims

Access to the **Health Facility Claims Page** is restricted to users with the role of Claim Administrator.

#### Pre-conditions

#### Navigation

All functionality for use with the administration of health facility claims can be found under the main menu **Claims**, sub menu **Health Facility Claims**.



Img. 1.2.1: Image - Navigation Health Facility Claims

Clicking on the sub menu **Health Facility Claims** re-directs the current user to the *Claims Control Page*.

#### Claims Control Page

The Claims Control Page is the central point for all health facility claim administration. By having access to this panel, it is possible to add, edit and search claims. Claims can be edited only in the state **Entered**. The panel is divided into four panels (Img. 1.2.2).

##### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of claims the following search options are available which can be used alone or in combination with each other.

- **Region**

Select the **Region**; where claiming or searched for health facility is located from the list of regions by clicking on the arrow on the right of the selector to select claims from a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected*

- **District**

Select the **district**; where claiming or searched for health facility is located from the list of districts by clicking on the arrow on the right of the selector to select

**Search Criteria**

Region: Any, District: Any, Health Facility: [Search], Claim Administrator: [Search], Batch Run (National): Any

Claim Status: Entered, Feedback Status: Any, Review Status: Any, Claim No.: [Search], Insuree No.: [Search], Claimed More Than: \$, Claimed Less Than: \$

Visit Date From: [Search], Visit Date To: [Search], Claimed From: 2020-03-18, Claimed To: [Search], Main Diagnosis: [Search], Visit Type: Any

**4 Claims Found**

Claim No.	Health Facility	Insuree	Claimed Date	Feedback Status	Review Status	Claimed	Approved	Status
rtetre	JMHO5001 Jamboro District Hor	Family Mater (1111111111)	3/20/2020	Idle	Idle	\$ 42100	\$ 0	Entered
111111s1	JMHO5001 Jamboro District Hor	Family Child (1111111113)	3/20/2020	Idle	Idle	\$ 11	\$ 0	Entered
12416546	JMHC001 Jamini Health Centre	Family Mater (1111111111)	3/19/2020	Idle	Idle	\$ 0	\$ 0	Entered
WXTT123	JMHC001 Jamini Health Centre	Macintyre Joseph (070707070)	3/18/2020	Idle	Idle	\$ 21000	\$ 0	Entered

Rows Per Page: 10, 1-4 of 4

Img. 1.2.2: Image - Claims Control Page

claims from a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- **HF Code**

Select the **HF Code** (Health Facility Code) from the list of codes of health facilities by clicking on the arrow on the right of the selector, to select claims from a specific health facility. *Note: The list will only be filled with the health facilities belonging to the selected district and assigned to the current logged in user.*

- **HF Name**

Type in the beginning of; or the full **HF Name** (Health Facility Name) to search for claims belonging to the health facility whose name start with or match completely the typed text.

- **Claim Administrator**

Select the **Claim Administrator** from the list of claim administrators by clicking on the arrow on the right of the selector, to select claims submitted by a specific claim administrator. *Note: The list will only be filled with the claim administrators belonging to the health facility selected.*

- **Visit Type**

Select the **Visit Type** from the list of visit types (or hospital stays) by clicking on the arrow on the right of the selector, to select claims with specified visit type.

- **Insurance Number**

Type in the beginning of; or the full **Insurance Number**, to search for claims, on behalf of insurees with the insurance number which starts with or match completely the typed text.

- **Claim No.**

Type in the beginning of; or the full **Claim No.**, to search for claims with the specific claim identification which starts with or match completely the typed text.

- **Review Status**

Select the **Review Status** from the list of options for review status by clicking on the arrow on the right of the selector, to select claims with specific review status.

- **Feedback Status**

Select the **Feedback Status** from the list of options for feedback status by clicking on the arrow on the right of the selector, to select claims with specific feedback status.

- **Claim Status**

Select the **Claim Status** from the list of options for claim status by clicking on the arrow on the right of the selector, to select claims with specific claim status.

- **Main Dg.**

Select the **Main Dg.** from the list of diagnoses status by typing text, all diagnoses containing the typed text will appear and be selectable underneath the box, to select claims with main diagnosis.

- **Batch Run**

Select the **batch run** from the list of batch runs by clicking on the arrow on the right of the selector, to select claims from specific batch run

- **Visit Date From**

Type in a date; or use the Date Selector ([Tab. 1.3.3](#)), to search for claims with a **Visit Date From** date which is on or is greater than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup. Visit Date From should be the day of admission for in-patient care or the visit date in case of out-patient care.*

- **Visit Date To**

Type in a date; or use the Date Selector ([Tab. 1.3.3](#)), to search for claims with a **Visit Date To** date which is on or is less than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup. Visit Date To should be the day of discharge for in-patient care or the visit date in case of out-patient care.*

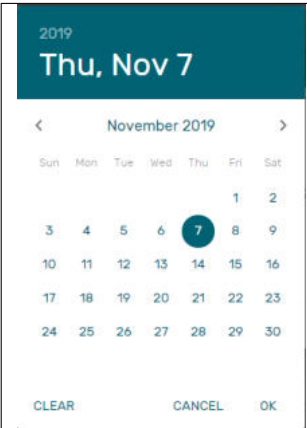
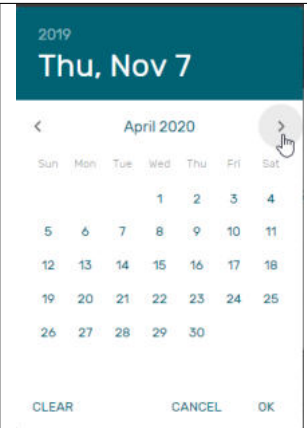
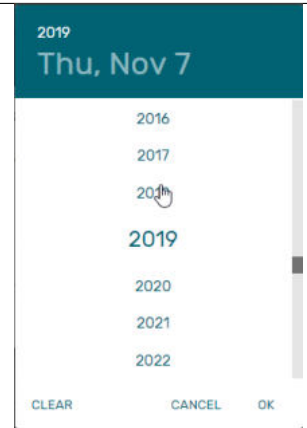
- **Claim Date From**

Type in a date; or use the Date Selector ([Tab. 1.3.3](#)), to search for claims with a **Claim Date** date which is on or is greater than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup\**

- **Claim Date To**

Type in a date; or use the Date Selector ([Tab. 1.3.3](#)), to search for claims with a **Claim Date** date which is on or is less than the date typed/selected. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

Tab. 1.2.1: Date Picker

		
<p>Img. 1.2.3: Day picker</p>	<p>Img. 1.2.4: Month picker</p>	<p>Img. 1.2.5: Year picker</p>
<p>At anytime during the use of the pop-up, the user can see the date of <b>today</b>. Clicking on a day will close the pop-up and display the date</p>	<p>Clicking on the arrow to the left displays the previous month. Clicking on the arrow on the right will displays the following month.</p>	<p>Clicking on the year will display a year selector.</p>

- Search Button

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The Result Panel displays a list of all claims found, matching the selected criteria in the search panel. The currently selected record is highlighted with light grey. (Img. 1.2.6). Double click on the line re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

4 Claims Found

SELECT ALL

Claim No.	Health Facility	Insuree	Claimed Date	Feedback Status	Review Status	Claimed	Approved	Status	
rtetre	JMHOS001 Jambero District Hos	Family Mister (111111111)	3/20/2020	Idle	Idle	\$42100	\$0	Entered	
111111s1	JMHOS001 Jambero District Hos	Family Child (111111113)	3/20/2020	Idle	Idle	\$11	\$0	Entered	
12416546	JMHC001 Jamini Health Centre	Family Mister (111111111)	3/19/2020	Idle	Idle	\$0	\$0	Entered	
WXTT123	JMHC001 Jamini Health Centre	Macintyre Joseph (070707070)	3/18/2020	Idle	Idle	\$21000	\$0	Entered	

Rows Per Page101-4 of 4

Img. 1.2.6: Selected record (grey) - Result Panel

A maximum of 10 records can be displayed per default but it can be changed by configuration ([gitHub](#)), in a scroll panel. Further records can be viewed by either changing the page or deleting/submitting the current loaded claims and search claims again.





## 3. Actions

Modular openIMIS comes with [Material UI](#) this means that there is a single button (Tab. 1.2.2) which function will change depending on the context (Icon change), for less used functions a tree dots menu is available (Tab. 1.2.3) only when claim(s) are selected. By double-clicking on the claim line, the user is directed to the [Claim Page](#), where the current selected claim can be edited (provided it in the state **Entered**), this page will

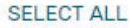

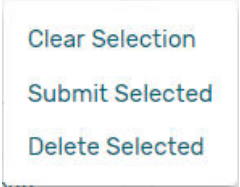


open with the current information loaded into the data entry fields. See the *Claim Page* for information on the data entry and mandatory fields.

Tab. 1.2.2: Material icons

			
Img. 1.2.7: <i>Add</i>	Img. 1.2.8: <i>Save</i>	Img. 1.2.9: <i>Back</i>	Img. 1.2.10: <i>Print</i>

Tab. 1.2.3: claims actions

		
Img. 1.2.11: <i>select all</i>	Img. 1.2.12: <i>tree dots</i>	Img. 1.2.13: <i>tree dots menu</i>

- add

By clicking on the add button (Img. 1.2.7), the user is directed to the *Claim Page*, where new entries for new claim can be added. When the page opens all entry fields are empty. See the *Claim Page* for information on the data entry and mandatory fields.

- Submit selected

By clicking on the submit selected manu (Img. 1.2.13), claim status of all selected claims with the status **Entered** will be submitted.

Once the process is done, a popup window ( Img. 1.2.14 ) with the result of the process will be shown.

- delete selected

By clicking on the delete selected menu, the current selected claim will be deleted.

Before deleting a confirmation popup ( Img. 1.2.15 ) is displayed, which requires the user to confirm if the action should really be carried out?

#### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a claim has been added, updated or deleted or if there was an error at any time during the process of these actions.

### Claim Page

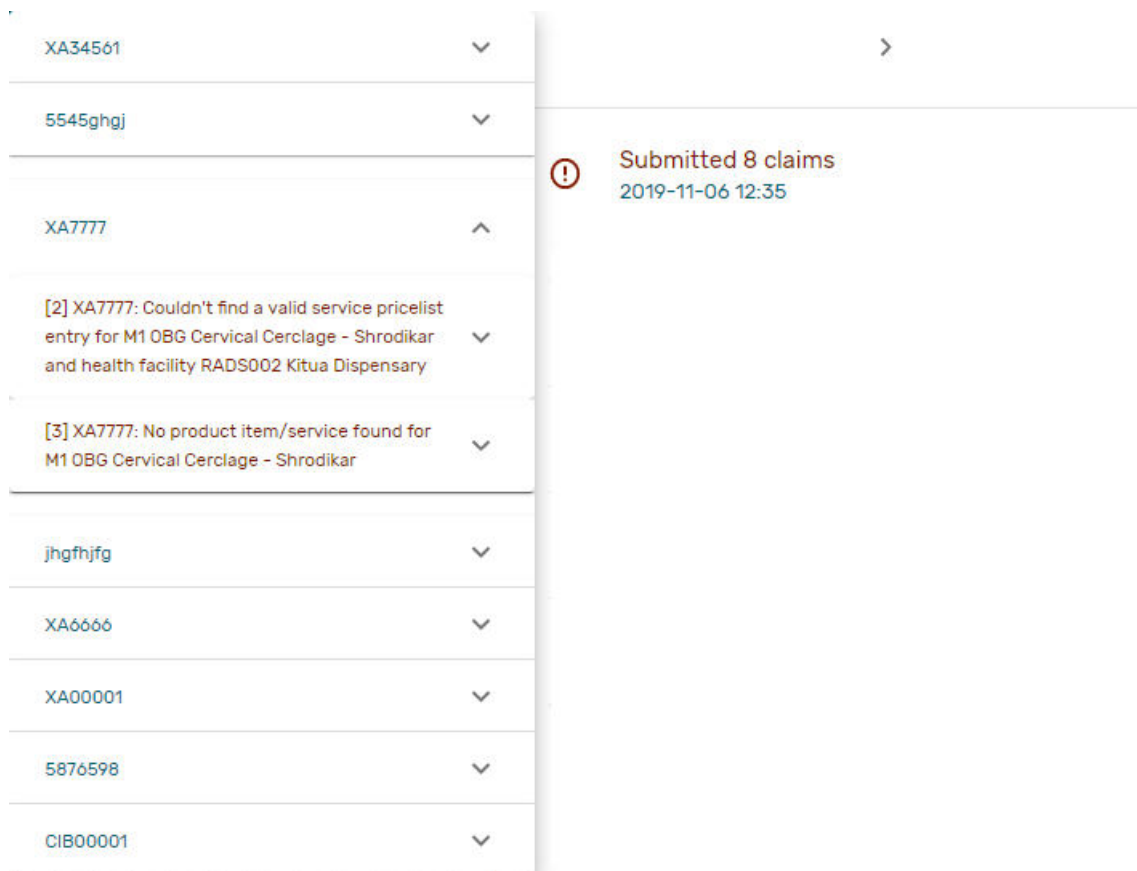
#### 1. Data Entry

- HF Code

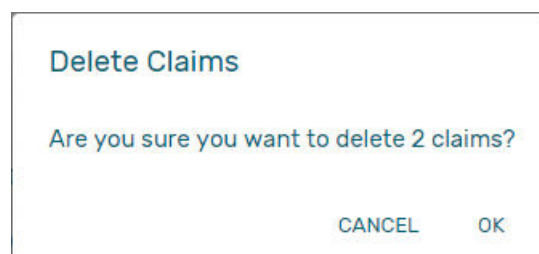
Displays the code of the health facility. The field is read only (taken over from the *Claims Control Page*) and cannot be edited.

- HF Name

Displays the name of the health facility. The field is read only (taken over from the *Claims Control Page*) and cannot be edited.



Img. 1.2.14: Submitted Claims details – Claims Control Page



Img. 1.2.15: Delete confirmation – Claims Control Page

**Claim XDDDFD33**

Health Facility: JMH0001 Jamini Health Centre

CHF ID\*: 111111111 Name: Mister Family

Visit Date From\*: 2020-03-23 Visit Date To: 2020-03-23 Date Claimed\*: 2020-03-23

Visit Type\*: Other

Main Diagnosis\*: A009 Cholera, unspecified Cholera, unsj

Claim No.: XDDDFD33

Guarantee No.:

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

Claim Administrator: JMH00011 Lobo

Explanation:

**Policy Information**

Code	Name	Expiry Date	Balance
Test ach	TST01	2020-01-31	\$ 0
BCUL0001	Basic Cover Ultra	2021-01-31	\$ 0

**Insuree Last Visit**

Claim No.	Visit Date From	Visit Date To
test che	2020-03-20	

**Services**

Service	Quantity	Price	Explanation
	X	\$	

**Items**

Item	Quantity	Price	Explanation
	X	\$	

Img. 1.2.16: Claim Page

- Insurance Number

Enter the insurance number of the patient. When the field is filled the insuree name will be updated (:refnum:'insuree\_picker'). Mandatory.

CHF ID\*      Name  
111111111      Mister Family

Img. 1.2.17: Search insuree popup

- Claim No.

Enter the identification of the claim. Mandatory, up to 8 characters. It should be unique within the claiming health facility.

- Main Dg.

Select the code of the main diagnosis by typing text, all diagnoses containing the typed text will appear and be selectable underneath the box. Mandatory.

- Sec Dg 1

Select the code of the first secondary diagnosis by typing text, all diagnoses containing the typed text will appear and be selectable underneath the box.

- Sec Dg 2

Select the code of the second secondary diagnosis by typing text, all diagnoses containing the typed text will appear and be selectable underneath the box

- Sec Dg 3

Select the code of the third secondary diagnosis by typing text, all diagnoses containing the typed text will appear and be selectable underneath the box

- Sec Dg 4

Select the code of the fourth secondary diagnosis by typing text, all diagnoses containing the typed text will appear and be selectable underneath the box

- Claim Administrator

Displays code of the claim administrator. The field is read only (taken over from *the Claim Control Page*) and cannot be edited.

- Visit Date From

Enter the visit date for out-patient care or the admission date for in-patient care. Mandatory.

- Visit Date To

Enter the discharge date for in-patient care.

- Date Claimed

Enter the date when the claim was prepared by the health facility.

- Guarantee No.

Enter identification of a guarantee letter for prior approval of provision of claimed health care.

- Visit Type

Select the type of visit/hospital admission from the drop down list (**Emergency, Referral, Other**)

- Services

1. service code

When entering the service code, a dropdown suggestion box for the available services with the service code or service name matching your typed text will be shown. Available medical services in the dropdown suggestion box are taken over from the pricelist of medical services associated with the claiming health facility. The desired service can then be selected from the dropdown suggestion box by clicking on it using mouse or selecting it using up and down arrows, then pressing Enter key fill the service code text field, together with quantity and value field in the same row.

Once the selected service has been written on the service data grid row, a new service line will be added and the dropdown suggestion box will close itself. When needed, the dropdown suggestion box can be closed by clicking any place on the page but outside the dropdown suggestion box.

Service	Quantity	Price	Explanation
<input type="text" value="c"/>		\$	
M1 OBG Cervical Cerclage - Shrodikar			
M2 OBG Cervix Repair			
M3 OBG Colpotomy	Quantity	Price	Explanation
M6 OBG Polypectomy - Cervical		\$	

Img. 1.2.18: Services dropdown suggestion box – Claim Page

1. quantity

This field can be filled manually by entering a number in it or automatically is filled by 1 when the service code above is filled, through dropdown suggestion box. It is this field that receives focus after service code is filled above from the dropdown suggestion box.

### 1. price

This field can be filled manually by entering a number in it or automatically is filled when the service code above is filled, through dropdown suggestion box. Automatically filled prices are taken over from the pricelist of medical services associated with the claiming health facility.

### 1. explanation

Enter extra information about the service for the scheme administration (a medical officer of the scheme administrator).

## • Items

### 1. item code

When entering the item code, a dropdown suggestion box for the available items with the item code or item name matching your typed text will be shown. Available medical items in the dropdown suggestion box are taken over from the pricelist of medical items associated with the claiming health facility. The desired item can then be selected from the dropdown suggestion box by clicking on it using mouse or selecting it using up and down arrows, then pressing Enter key to fill the item code text field, together with quantity and value field in the same row.

Once the selected item has been written on the item data grid row, a new service line will be added and the dropdown suggestion box will close itself. When needed, the dropdown suggestion box can be closed by clicking any place on the page but outside the dropdown suggestion box.

Service	Quantity	Price	Explanation
M2 OBG Cervix Repair	1	\$ 21000	
geni	1	\$	

Dropdown suggestion box items:

- M5 OBG Perineal / Genital Repair
- I21 BLOOD GROUPING - A, B & O ANTIGENS
- A1 General Consultation

Img. 1.2.19: *Items dropdown suggestion box – Claim Page*

### 1. quantity

This field can be filled manually by entering a number in it or automatically is filled by 1 when the item code above is filled, through dropdown suggestion box. It is this filled that receives focus after item code is filled above from the dropdown suggestion box.

### 1. price

This field can be filled manually by entering a number in it or automatically is filled when the item code above is filled, through dropdown suggestion box. Automatically filled prices are taken over from the pricelist of medical items associated with the claiming health facility.

### 1. explanation

Enter extra information about the medical item for the scheme administration (a medical officer of the scheme administrator).

## • claimed

This field is filled automatically with a new total of quantities multiplied to their corresponding values in both data input grids at any time when there is a change in values in the either quantity fields or value fields anywhere in both data input grids.

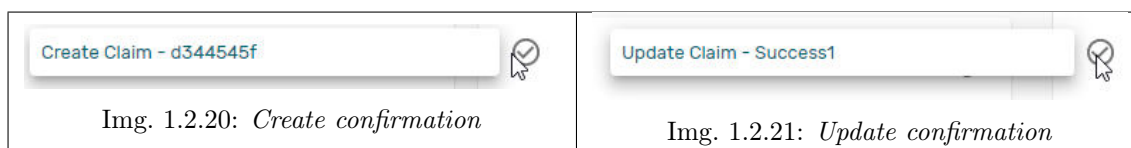
- **explanation**

Enter extra information about the whole claim for the scheme administration (a medical officer of the scheme administrator).

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button (Img. 1.2.8) will save the claim. The user stay in the *Claim Page*; a message confirming that the claim has been saved will appear on the right of the *Claim Page* (Tab. 1.2.4).

Tab. 1.2.4: claim save confirmation



## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk).

## 4. Printing of a claim

By clicking on the **Print** button (Img. 1.2.10), the user will be shown a printable version of the claim details page. The printable version of the claim is available in the pdf formats.

## 5. Creating of a new claim

By clicking on the **Add** button (Img. 1.2.7), the *Claim Page* is cleared (with exception of HF Code, HF Name and Claim Administrator) and it ready for entering of a new claim for the same health facility and of the same claim administrator as before.

## 6. back

By clicking on the **back** (Img. 1.2.9) button, the user will be re-directed to the *Claims Control Page*

## 1.2.2 Review claims

The functionality allows reviewing and adjustments of claims from medical point of view. Reviewing of claims is restricted to users with the system role of Medical Officer or with a role including an access to Claims/Claim/Review.

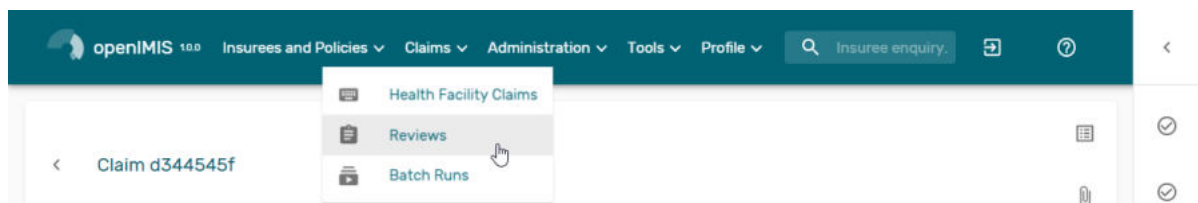
### Pre-conditions

A claim has been already submitted.

### Navigation

All functionality for use with the administration of claim overview can be found under the main menu **Claims**, sub menu **Reviews**.

Clicking on the sub menu **Review** re-directs the current user to the *Claims Overview Page*



Img. 1.2.22: *Navigation Review*

Health Facility: JMH001 Jamini Health Centre

Insured: Manth Gayle (111111116)

Date Claimed \*: 2019-12-04

Visit Date From \*: 2019-12-04

Visit Date To:

Visit Type: Other

Main Diagnosis: A00 Cholera

Claim No. \*: hjpgfjgh

Guarantee No.:

Claimed: \$ 400

Approved: \$ 400

Adjusted: \$

Sec Dg1:

Sec Dg2:

Sec Dg3:

Sec Dg4:

Claim Administrator: JMH0011 Lobo

Explanation:

Adjustment:

**Services**

Service	Quantity	Price	Explanation	App. Quantity	App. Price	Justification	Status	R
A1 General Co	1	\$ 400			\$		Passed	

Total Claimed: \$ 400

Total Approved: \$ 400

Img. 1.2.23: *Image - Claims Overview Page*

## Claims Overview Page

The Claims Overview Page is the central point for all claim review administration. By having access to this panel, it is possible to review, feedback, amend and process claims. The panel is divided into five sections ([Img. 1.2.23](#)).

### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of claims the following search options are available, which can be used alone, or in combination with each other.

- **Region**

Select the **Region**; from the list that appear after typing characters, all region containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected*

- **District**

Select the **District**; from the list that appear after typing characters , all district containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected*

- **HF Code**

Select the **HF Code**; from the list that appear after typing characters, all HF code containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the health facilities belonging to the selected district and assigned to the current logged in user.*

- **HF Name**

Type in the beginning of; or the full **HF Name**, to search for claims belonging to the health facility whose name start with or match completely the typed text

- **Claim Administrator**

Select the **claim administrator** from the list that appear after typing characters , all claim administrator containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the claim administrators belonging to the health facility selected.*

- **Insurance Number**

Enter the insurance number of the patient. When the field is selected, the search insuree popup(:refnum:'insuree\_picker') will be display and will allow the claim administrator to search the insuree based on its insurance number, or/and last name, or/and other(first) name

- **Claim No**

Type in the beginning of; or the full **Claim No**, to search for claims with claim identification which start with or match completely the typed text.

- **Review Status**

Select the **Review Status** from the list of the options for review status by clicking on the arrow on the right of the selector to select claims with a specific review status

- **Feedback Status**

Select the **Feedback Status** from the list of the options for feedback status by clicking on the arrow on the right of the selector to select claims with a specific feedback status



- **Claim Status**

Select the **Claim Status** from the list of the options for claim status by clicking on the arrow on the right of the selector to select claims with a specific claim status.

- **Main Dg**

Select the **Main Dg.** from the list of diagnoses by typing characters, all diagnoses containing the typed text will appear and be selectable underneath the box, to select claims with main diagnosis.

- **Batch Run**

Select the **Batch Run** from the list of batch runs by clicking on the arrow on the right of the selector to select claims included in a specific batch run.

- **Visit Date From**

Type in a date; or use the Date Selector (Tab. 1.3.3), to search for claims with a **Visit Date From** which is on or is greater than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup.*

- **Visit Date To**

Type in a date; or use the Date Selector (Tab. 1.3.3), to search for claims with a **Visit Date To** which is on or is less than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup.*

- **Claim Date From**

Type in a date; or use the Date Selector (Tab. 1.3.3), to search for claims with a **Claim Date From** which is on or is greater than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup.*

- **Claim Date To**

Type in a date; or use the Date Selector (Tab. 1.3.3), to search for claims with a **Claim Date To** which is on or is less than the date typed/selected. *Note. To clear the date entry box; use the “Clear” button on the date picker popup.*

- **Visit Type**

Select type of out-patient visit or in-patient admission from the list of types of visit to search for claims made on specific visit/admission type.

## 2. Claim Selection Update Panel

This panel is basically for functionality of updating multiple claims which are currently loaded in the Result Panel at once basing on the claim filter criteria available on this panel. The update on the claims is basically changing **Feedback Status** and **Review Status** of a claim from **Idle** to **Selected for Feedback** or **Selected for Review** respectively. The filters in this panel work on the claims which are currently loaded on the result panel. The combination of filters is either **Select** and either **Random** or **Value** combination of **Value** and **Variance**.

- **Select**

A selection dropdown box to select between **Review Select** and **Feedback Select** to filter only claims whose review status is **Idle** or feedback status is **Idle** respectively from among claims currently in the Result Panel.

- **Random**

Accept a number which is considered to be a percentage of the claims in the Result Panel. Check the random checkbox and enter a number on the text field next to checkbox. The default is 5%.

- **Value**

Accept a number which is considered to be claimed value. This will filter claims from the Result Panel by taking claims whose claimed value is equal or greater than the entered number in the Value text field. Check the value checkbox and enter a number on the text field next to checkbox.

- **variance**

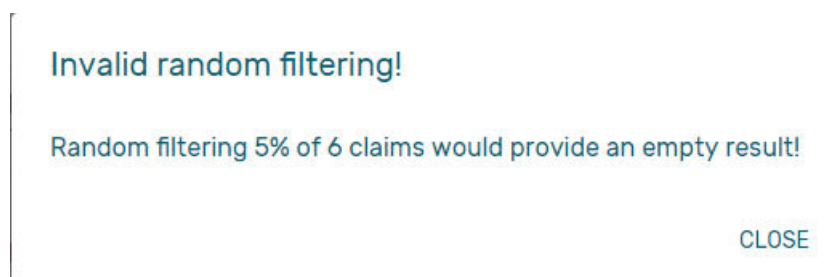
Enable to set a variance around the Value specified **Percentage Variance** =  $[(\text{Claim Value Filter Value}) - 1] * 100$

- **filter button**

Once desired criteria have been set and after clicking this button(Img. 1.2.29), then the claims currently displayed in the result panel which satisfy the criteria, a reduced number of claim will be displayed in the result panel

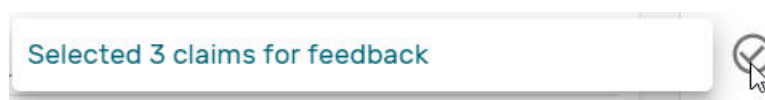
- **bulk updates**

One can select them all (Img. 1.2.28) then by clicking on the 3 dots(Img. 1.2.30) more advanced actions (Img. 1.2.31) will be displayed



Img. 1.2.24: Error message when the filter have no result

A notification will be displayed to confirm display the action result(Img. 1.2.25)



Img. 1.2.25: Claim Review Action Notification

### 3. Result Panel

The Result Panel displays a list of all claims found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.2.26).

Per default 10 records can be displayed at one time in a scroll panel but this number can be changed (Img. 1.2.35, the default value can also be changed in front end configuration), Further records can be viewed by changing pages (Img. 1.2.34).

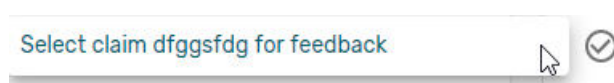
The Feedback and Review Status Columns in each row contain a drop down list with options for claim feedback status and claim review status. A user can change the claim feedback and review status to **Idle** to **Not Selected** or **Selected** or **Bypass**. the change will take effect directly in an asynchronous mode, a notification will indicate the result of the update (Img. 1.2.27)

- **Deliver Review**

Clicking on this button (Img. 1.2.33) re-directs a user to the *Claim Review Page*, where a claim with review status **Selected for Review** can be reviewed and its current review status changed to **Reviewed**. If the claim is not in the status **Selected for Review** then the claim can be only loaded and shown to the user without any subsequent action.

6 Claims Found									
Selected 1 claim(s)									
						Sum: \$ 400	Sum: \$ 400		
Claim No.	Health Facility	Insuree	Claimed Date	Feedback Status	Review Status	Claimed	Approved	Status	Attachments
dfggsfdg	JMHC001	Manth Aby	03/12/2019	Idle	Selected	\$ 400	\$ 400	Checked	
ddddd	JMHC001	Manth Gay	03/12/2019	Selected	Idle	\$ 400	\$ 400	Checked	
dfggsfdg	JMHC001	Manth Ren	03/12/2019	Selected	Idle	\$ 400	\$ 400	Checked	

Img. 1.2.26: Claim Review Search Result: Selected (light grey), record updated (zebras)



Img. 1.2.27: Selection of claim for feedback/review notification

- Deliver feedback

Clicking on this button (Img. 1.2.32) re-directs a user to the *Claim Feedback Page*, where a claim with feedback status **Selected for Feedback** can be feed backed and its current feedback status changed to **Delivered**.

#### 4. Actions Menu

The Action menu is used in conjunction with the current selected record (highlighted with light grey). The user should first select a record by clicking on any position of the record or by clicking on **Select All** (Img. 1.2.28)

Tab. 1.2.5: claims review actions

<p>Img. 1.2.28: Select all</p>	<p>Img. 1.2.29: Filter button</p>	<p>Img. 1.2.30: tree dots</p>	<p>Img. 1.2.31: review actions menu</p>
<p>Img. 1.2.32: Deliver Feedback Button</p>	<p>Img. 1.2.33: Deliver Review Button</p>	<p>Img. 1.2.34: Page browser</p>	<p>Img. 1.2.35: Change the number of record per page</p>

- **Clear Selection:**  
Unselect the selected claims
- **Select For Feedback:**  
set the feedback status of the selected claims to **Selected**
- **Skip feedback:**  
set the feedback status of the selected claims to **Not Selected**
- **Select For Review:**  
set the review status of the selected claims to **Selected**
- **Skip Review:**  
set the review status of the selected claims to **Not Selected**
- **Process selected:**  
Process the selected claim with the status **Checked**, once processed the claims will have the status
- **Processed:**  
this means that the valuation will be done against the ceiling and deductible configuration on the product page

## 5. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a claim has been reviewed, updated, feedback added on claim or if there was an error at any time during the process of these actions.

## Claim Review Page

### 1. Data Entry

The screenshot displays the 'Claim Review Page' in the openIMIS 1.0.0 interface. The top navigation bar includes links for 'Insurees and Policies', 'Claims', 'Administration', 'Tools', and 'Profile'. A search bar is present with the text 'Insuree enquiry'. The main content area is titled 'Claim hjcjfhgh'. It contains a form with the following fields:

- Health Facility: JMHC001 Jamini Health Centre
- Insured: Manth Gayle (111111116)
- Date Claimed \*: 2019-12-04
- Visit Date From \*: 2019-12-04
- Visit Date To:
- Visit Type: Other
- Main Diagnosis: A00 Cholera
- Claim No. \*: hjcjfhgh
- Guarantee No.:
- Claimed: \$ 400
- Approved: \$ 400
- Adjusted: \$
- Sec Dg1:
- Sec Dg2:
- Sec Dg3:
- Sec Dg4:
- Claim Administrator: JMHC0011 Lobo
- Explanation:
- Adjustment:

Below the form is a table titled 'Services' with the following data:

Service	Quantity	Price	Explanation	App. Quantity	App. Price	Justification	Status	R
A1 General Co	1	\$ 400			\$		Passed	

Summary statistics at the bottom of the services table:

- Total Claimed: \$ 400
- Total Approved: \$ 400

Img. 1.2.36: Claim Review Page

**Claim Review Page** will show read-only information of the current claim selected for review, on the top section of the page, on some of the grid columns of the claim services grid and claim items

grid and on the bottom of all the grids. As well, the page has input boxes where a user with the system role Medical Officer or with a role including an access to Claims/Claim/Review can enter new relevant values for review of the current claim.

- **Read-only information of the current claim**

- **HF**

- The health facility code and name which the claim belongs to.

- **Main Dg.**

- The code of the main diagnosis.

- **Sec Dg1**

- The code of the first secondary diagnosis.

- **Sec Dg2**

- The code of the second secondary diagnosis.

- **Sec Dg3**

- The code of the third secondary diagnosis.

- **Sec Dg4**

- The code of the fourth secondary diagnosis.

- **Visit type**

- The type of the visit or of the hospital stay (**Emergency, Referral, Other**)

- **Date Processed**

- The date on which the claim was processed (sent to the state **Processed**).

- **Claim Administrator**

- The administrator's code, who was responsible for submission of the current claim.

- **Insurance Number**

- The insurance number of the patient

- **Claim No.**

- The unique identification of the claim within the claiming health facility.

- **Patient Name**

- The full name of the patient on whom the claim is made

- **Date Claimed**

- The date on which the claim was prepared by the claiming health facility

- **Visits Date From**

- The date on which the patient visited (or was admitted by) the health facility for treatment on which the claim is basing on

- **Visit Date To**

- The date on which the patient was discharged from the health facility for treatment on which the claim is basing on

- **Guarantee No.**

- Identification of a guarantee letter.

- **Claimed**

- The sum of prices of all claimed services and items at the moment of submission of the claim.

- approved

The value of the claim after automatic checking during its submission and after the corrections of the claim done by a medical officer.

- Adjusted

The value of the claim after automatic adjustments done according to the conditions of coverage by the patient's policy.

- Explanation

Explanation to the claim provided by the claiming health facility.

- claim status

Claim status is shown on the very bottom right end side after the two grids. This is status which claim gets after submission.

- **Editable information of the current claim**

- Adjustment

Enter a text summarizing adjustments in claim done by a medical officer.

- **Services and Items data entry grids.**

1. Approved Quantity (app.qty)

Enter a number of approved provisions of the corresponding medical service or item.

2. Approved Price (app. price)

Enter an approved price of the corresponding medical service or item.

3. justification

Enter justification for the entered corrections of the price and quantity of the medical service or item.

4. status

Select either the status in the claim **Passed** or **Rejected** for the corresponding medical service or item respectively.

5. rejection reason

The last column of each of the two grids, headed with character '**R**', gives rejection reason number for each of the claimed services or claimed items in the claim services grid or the claim items grid respectively. Rejection reasons are as follows:

The rejection description is displayed on the screen when the mouse pointer is above the given line (Img. 1.2.37)



Img. 1.2.37: Image Rejection Description

Reason Code	Reason Description
-1	Rejected by a medical office
10	Accepted
1	Item/Service not in the registers of medical items/services
2	Item/Service not in the pricelists associated with the health facility
3	Item/Service is not covered by an active policy of the patient
4	Item/Service doesn't comply with limitations on patients (men/women, adults/children)
5	Item/Service doesn't comply with frequency constraint
6	N/A
7	Not valid insurance number
8	Diagnosis code not in the current list of diagnoses
9	Target date of provision of health care invalid
10	Item/Service doesn't comply with type of care constraint
11	Maximum number of in-patient admissions exceeded
12	Maximum number of out-patient visits exceeded
13	Maximum number of consultations exceeded
14	Maximum number of surgeries exceeded
15	Maximum number of deliveries exceeded
16	Maximum number of provisions of item/service exceeded
17	Item/service cannot be covered within waiting period
18	N/A
19	Maximum number of antenatal contacts exceeded

## 2. Saving / Reviewing

Once appropriate data is entered, clicking on the **Save** button ([Img. 1.2.8](#)) will save the claim review and set the review status to **deliver**; a message confirming that the claim has been saved will appear on the Information Panel.

## 3. data entry validation

If inappropriate data is entered at the time the user clicks the **Save** button, an error message will appear in the Information Panel, and the data field will take the focus

## 4. Back

By clicking on the **back** button ([Img. 1.2.9](#)), the user will be re-directed to the [Claims Overview Page](#).

## Claim Feedback Page

The Claim Feedback page will show read-only information of the current claim selected for feedback, on the top section of the page it has input boxes where a user with the system role Medical Officer or with a role including an access to Claims/Claim/Feedback can enter feedback on the current claim or where the user can read a feedback delivered by enrolment officers.

### 1. Data Entry

- Read-only data of the feedback includes in the section **Claim** the following:
  - **Health Facility**  
The health facility code and name which the claim belongs to.
  - **Insuree**  
Patient/beneficiary names and insurance number

**Claim hjgfjgh**

Health Facility JMHC001 Jamini Health Centre	Insured * Manth Gayle (111111116)	Date Claimed * 2019-12-04	Visit Date From * 2019-12-04	Visit Date To
Visit Type Other	Claim No. * hjgfjgh	Guarantee No.	Claim Status Checked	Feedback Status Idle
Review Status Idle				
Claim Administrator JMHC001 Lobo				

**Feedback**

Feedback Date: [Slider: Unknown, No, Yes]

Care Rendered: [Slider: Unknown, No, Yes]

Drugs Prescribed: [Slider: Unknown, No, Yes]

Payment Asked: [Slider: Unknown, No, Yes]

Drugs Received: [Slider: Unknown, No, Yes]

Overall Assessment: [Slider: Unknown, Very Bad, Bad, Not So Bad, Not So Good, Good, Very Good]

Img. 1.2.38: *Claim Feedback Page*

– **Date Claimed**

The date on which the claim was prepared by the claiming health facility

– **Visits Date From**

The date on which the patient visited (or was admitted by) the health facility for treatment on which the claim is basing on

– **Visit Date To**

The date on which the patient was discharged from the health facility for treatment on which the claim is basing on

– **Visit Type**

Type of visit covered by the claim (emergency, referral, other)

– **Claim No.**

The unique identification of the claim within the claiming health facility.

– **Guarantee No.**

Identification of a guarantee letter for prior approval of provision of claimed health care.

– **Claim Status**

The status of the claim.

– **Review Status**

The status of the claim with respect to reviewing.

– **Feedback Status**

The status of the claim with respect to feed backing.



- **Claim Administrator**

The administrator's code and name, who was responsible for submission of the current claim.

- Modifiable data of the feedback included in the section **Feedback** the following

- **Feedback Date**

Type in a date of collection of the feedback; Clicking on the field will pop-up an easy to use, calendar selector ([Tab. 1.3.3](#)); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- **Enrolment Officer**

Select an enrolment officer from the list of enrolment officers, by clicking the arrow on the right side of selection field. The enrolment officer collects feedback from the patient.

- **Care Rendered**

Select 'Yes' or 'No' from the slider

- **Payment Asked**

Select 'Yes' or 'No' from the slider

- **Drugs Prescribed**

Select 'Yes' or 'No' from the slider

- **Drugs Received**

Select 'Yes' or 'No' from the slider

- **Overall Assessment**

Choose one level among the six levels available from the slider

### 1. **Saving**

Once all mandatory data is entered, clicking on the **Save** button ([Img. 1.2.8](#)) will save the feedback on current claim. The user will be re-directed back to the [Claims Overview Page](#); a message confirming that the feedback has been saved will appear on the Information Panel. If inappropriate data is entered or mandatory data is not entered at the time the user clicks the Save button, an error message will appear in the Information Panel, and the data field will take the focus.

### 2. **Back**

By clicking on the **back** button ([Img. 1.2.9](#)), the user will be re-directed to the [Claims Overview Page](#)

## 1.2.3 Batch Run

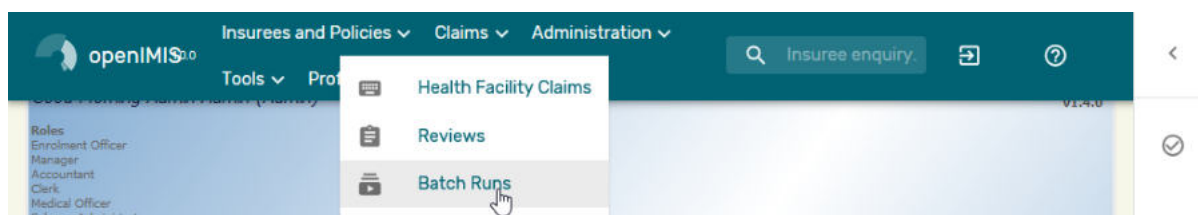
Administration of batches of claims is restricted to users with the system role of Accountant or with a role including an access to Claims/Claim/Batch.

### Pre-conditions

A claim has been already processed ([review actions menu](#)).

## Navigation

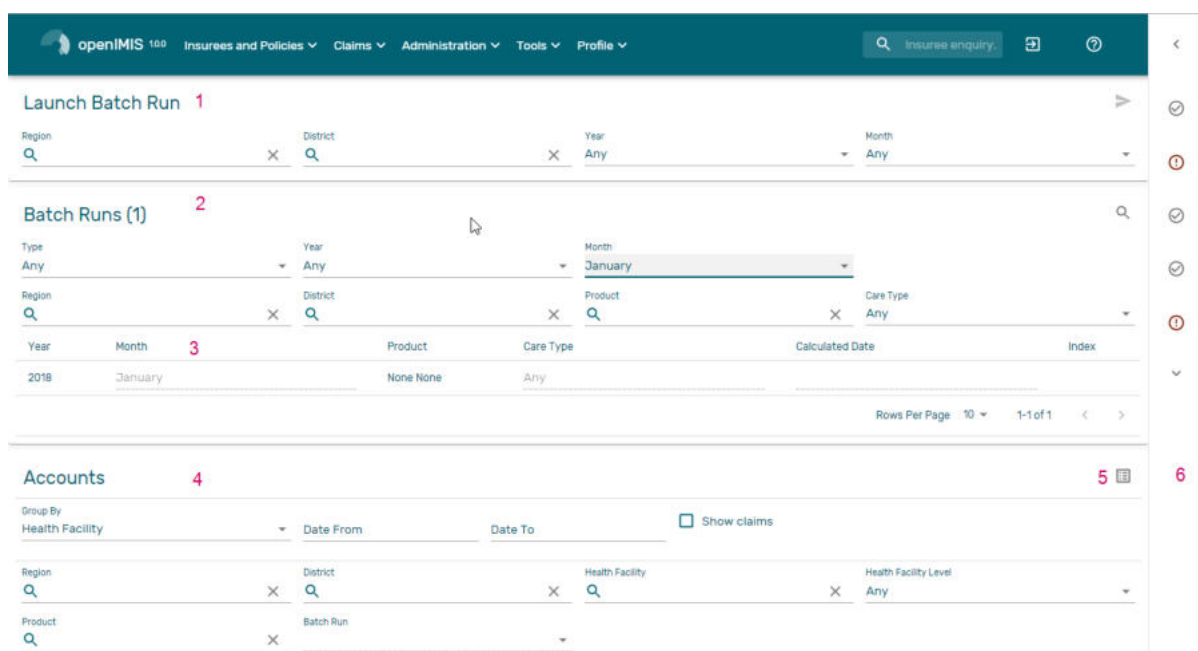
All functionality for use with the administration of processing of batches can be found under the main menu **Claims**, sub menu **Batch Run** (Img. 1.2.39).



Img. 1.2.39: Navigation Batch Run

Clicking on the sub menu **Batch Run** re-directs the current user to the *Batch Run Control Page*.

## Batch Run Control Page



Img. 1.2.40: Batch Run Control Page

The Batch Run Control Page is the central point for batch processing administration. Access to the page is restricted to users with the system role of Accountant or with a role including an access to Claims/Claim/Batch. By having access to this page, it is possible to process batches, filter, and filter for accounts. The panel is divided into six sections (Img. 1.2.40)

### 1. Batch Processing Panel

The batch processing panel allows a user to process batches based on the following criteria:

- **Region**

Select the **Region** from the list of regions by clicking on the arrow on the right of the selector to select a region. *Note: The list will only be filled with the regions assigned to the current logged in user and the option National.* The option **National** will process all the claim for the period specified in **Month** and **Year**

- **District**

Select the **district** from the list of districts by clicking on the arrow on the right of the selector to select a district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is the only one then the district will be automatically selected. If no district is selected then the processing is done only for insurance product defined for the selected region.*

- **Year**

Select the **Year** from the list of available years by clicking on the arrow on the right of the selector. Only periods for which a batch hasn't been run yet are offered in both lists.

- **Month**

Select the **Month** from the list of months by clicking on the arrow on the right of the selector.

The Month at the end of the quarter process the claim for insuree having a product with Quaterly distribution (*Product Page*):

- March -> Process the claim for first quatrter
- June -> Process the claim for second quatrter
- September -> Process the claim for Third quatrter
- December -> Process the claim for Fourth quatrter

December process the claim for insuree having a product with Yearly distribution (*Product Page*)

- **Process**

Once criteria are chosen, clicking on this button (*Img. 1.2.41*), the claims will be processed based on the selected criteria. If the option **National** was used in the field **Region**, the batch will run only for nationwide insurance products. If a region is selected in the field **Region** and no district is selected, the batch will run only for regional insurance products for the selected region. If a district is selected in the field **District** the batch is run only for district insurance products for the selected district.



Img. 1.2.41: *Batch Run Process Button*

## 2. Filter Panel for the relative price index per product and period

The filter panel allows a user to filter the of indexes for relative pricing per period, product and zone (results of running of batches). In case the product doesn't have any distribution configured then no relative price index are calculated by running the batch meaning no record will be added to the below list.

the Relative price indexes can be filtered based on the following criteria:

- **Type**

Select the **Type**; from the list of time group types (**Monthly, Quarterly, Yearly**) by clicking on the arrow on the right of the selector.

- **Year**

Select the **Year**; from the list of available years by clicking on the arrow on the right of the selector.

- **Period**

Select the **Period**; from the list of months/quarters by clicking on the arrow on the right of the selector.

- **Region**

Select the **Region**; from the list that appear after typing characters, all region containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected*

- **District**

Select the **District**; from the list that appear after typing characters, all district containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected*

- **Product**

Select the **Product**; from the list that appear after typing characters, all product containing the typed text will appear and be selectable underneath the box.

- **Category**

Select category of health care (**In-patient/hospital, Out-patient/Non-hospital, All**) from the list of categories of health care by clicking on the arrow on the right of the selector.

- **Filter**

Once criteria are chosen, clicking on this filter button ([Img. 1.2.42](#)) will filter based on the selection criteria.



Img. 1.2.42: Batch Run filter Button

### 3. Display Panel for the relative price index per product and period

The Display Panel is used to display results of running of batches after the filter or processing.

### 4. Filter for Accounts Panel

The Filter for Accounts Panel is used in filtering of batch protocols for an accounting system based on the following criteria:

- **Group By**

Select either grouping of the report by health facility (**health facility**) or by product (**Product**).

- **Start Date**

Type in a date; or use the Date Selector ([Tab. 1.3.3](#)) to enter date which is equal or less than claim date. *Note. To clear the date entry box; use the “Clear” button on the date picker popup.*

- **End Date**

Type in a date; or use the Date Selector ([Tab. 1.3.3](#)) to enter date which is equal or greater than claim date. *Note. To clear the date entry box; use the “Clear” button on the date picker popup.*

- **Show Claims**

Check this checkbox, if you need to show all claims in detailed way in the protocol.

- **Region**

Select the **Region**; from the list that appear after typing characters, all region containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected*

- **District**

Select the **District**; from the list that appear after typing characters , all district containing the typed text will appear and be selectable underneath the box. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected*

- **Health facility**

Select the **Health facility**; from the list that appear after typing characters, all Health facility containing the typed text will appear and be selectable underneath the box.\**Note: The list will only be filled with the Health facility belonging to the selected region and assigned to the current logged in user. If this is only one then the Health facility will be automatically selected\**

- **Product**

Select the **Product**; from the list that appear after typing characters , all product containing the typed text will appear and be selectable underneath the box.

- **Health facility Level**

Select a level from the list of levels of health facilities by clicking on the arrow on the right of the selector.

- **Show All**

Check this checkbox, if you need to show all health facilities in the report although they have no claim included.

- **Preview**

Once criteria are chosen, clicking on this preview button ([Img. 1.2.43](#)) will create a protocol of the selected batch.



Img. 1.2.43: Accountant report preview Button

## 5. Button Panel

This panel contains control button.

- **Back**

By clicking on the back button ([Img. 1.2.9](#)), the user will be re-directed to the [Home Page](#).

## 6. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a batch has been processed, filtered or if there was an error at any time during the process of these actions.

## 1.3 Administration of registers

Registers of openIMIS serve as a principal tool by which openIMIS is adjusted to needs of health insurance schemes. With exception of the register of Users that can be managed only by users with the system role openIMIS Administrator or with a role including an access to Administration/Users or Locations, all other registers can be managed by users with the role Scheme Administrator or with a role including an access to Administration/Products or Health Facilities or Pricelists or Medical Services or Medical Items or Enrolment Officers or Claim Administrators or Payer. There is no system role that includes an access to the register of user profiles. Only users having a role including an access to Administration/User Profiles can access the register of User Profiles.

The register of Users defines who can login to openIMIS and under what constraints. The register of Locations defines administrative division of the territory, on which a health insurance scheme is operated. The register of Payers allows specification of institutional payers that can pay contributions on behalf of policy holders (households, groups of persons). The register of Enrolment Agents specifies all persons (either employed or contracted) by the scheme administration that are entitled to distribute/sell policies to population. The register of Claim Administrators specifies all employees of health facilities that are entitled to submit claims to the scheme administration. The register of Health Facilities contains all contractual health facilities that can submit claims to the scheme administration. The register of Medical Items specifies all possible medical items (drugs, prostheses, medical devices etc.) that can be used in definitions of packages of insurance products and in pricelists associated with contractual health facilities. The register of Pricelists that splits into two divisions for Medical Services and for Medical Items contains pricelists valid for individual health facilities or their groups reflecting results of price negotiations between contractual health facilities and the scheme administration. Finally, the register of Products includes definitions of all insurance products that can be distributed/ sold within the health insurance scheme.

### 1.3.1 Insurance Products Administration

The register of insurance products contains all insurance products in the health insurance scheme. There may be several insurance products available for distribution/selling in a territory, e.g. one basic product and one or several supplemental insurance products. The insurance products may be at the different levels. For example that basic insurance product may be at the national level whereas the supplemental insurance products may be at the regional level. Administration of the register of insurance products is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Products.

#### Pre-conditions

An insurance product may only be added or thereafter edited, after the approval of the management of the scheme administration.

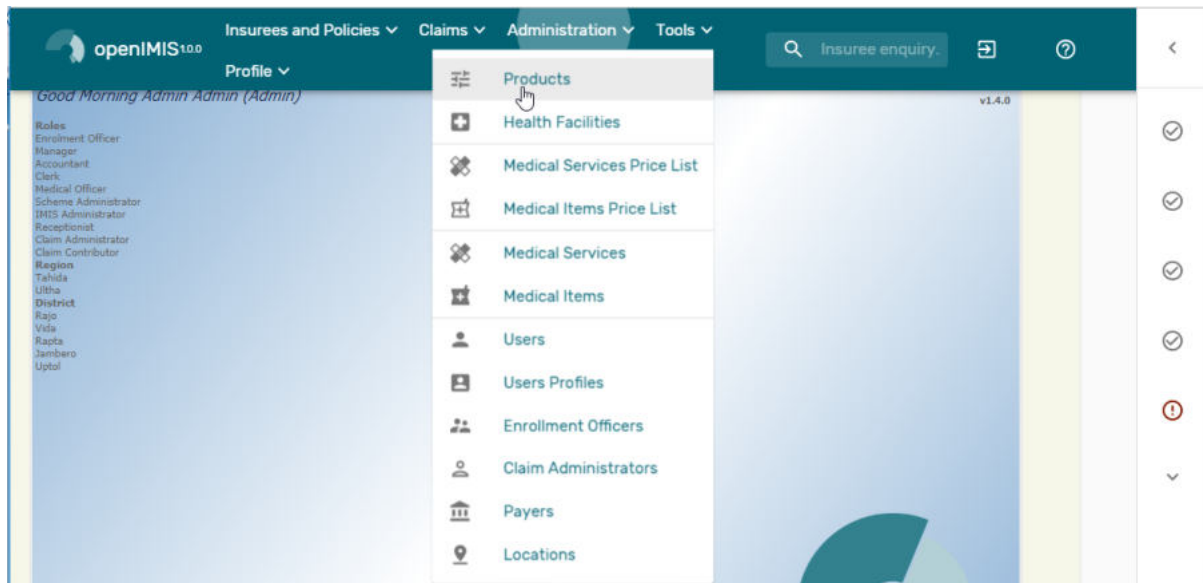
#### Navigation

All functionality for use with the administration of insurance products can be found under the main menu **Administration**, sub menu **Products**.

#### Product Control Page

Clicking on the sub menu **Products** re-directs the current user to the **Product Control Page**.

The **Product Control Page** is the central point for administration of insurance products. By having access to this page, it is possible to add, edit, duplicate and search. The panel is divided into four panels. ([Img. 1.3.2](#))



Img. 1.3.1: *Navigation Products*

**Select Criteria**

Products

Code  Name  Region  District  ☐ Historical

Date From  Date To

**8 Products Found**

CODE	NAME	REGION	DISTRICT	DATE FROM	DATE TO	MAXIMUM MEMBERS	LUMP SUM	CONTRIBUTION ADULT	CONTRIBUTION CHILD	INSURANCE PERIOD	GRACE PERIOD ENROLMENT	VALID FROM	VALID TO
NF01	National free enrolment	National		01/01/2015	01/01/2020	5	10,000.00	2,000.00	1,000.00	12	0	17/05/2017	
RF01	Regional free	TestRegion		01/01/2016	01/12/2025	3	5,000.00	2,000.00	500.00	12	0	01/01/2016	
DF01	District free enrolment	TestRegion	TestDistrict1	01/01/2015	01/01/2025	6	20,000.00	2,000.00	1,000.00	12	0	01/01/2016	
NX01	National fixed enrolment	National		01/01/2016	28/05/2017	100	0.00	1,000.00	500.00	12	1	29/05/2017	
RX01	Regional fixed enrolment	TestRegion		01/10/2016	01/01/2030	6	10,000.00	1,000.00	500.00	12	0	01/01/2016	
DX01	District fixed enrolment	TestRegion	TestDistrict1	01/01/2017	01/01/2024	5	5,000.00	1,000.00	2,000.00	12	1	01/01/2016	
T001	Test product	TestRegion		01/01/2017	12/05/2017	5	10,000.00	1,000.00	2,000.00	12	0	13/05/2017	
NX01-1	National fixed enrolment	National		01/01/2016	01/01/2024	100	0.00	1,000.00	500.00	12	1	29/05/2017	

Img. 1.3.2: *Product Control Page*



## 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of Products the following search options are available, which can be used alone, or in combination with each other.

- **Product Code**

Type in the beginning of; or the full **Product Code**; to search for products with a **Product Code**, which starts with or matches completely, the typed text.

- **Product Name**

Type in the beginning of; or the full **Product Name** to search for products with a **Product Name**, which starts with or matches completely, the typed text.

- **Date From**

Type in a date; or use the Date Selector Button, to search for products with a **Date From**, which is on or is greater than the date typed/selected. *Note: To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date To**

Type in a date; or use the Date Selector Button, to search for products with a **Date To**, which is on or is greater than the date typed/selected. *Note: To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector ([Tab. 1](#)); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- Anytime during the use of the pop-up, the user can see the date of today.
- Clicking on today will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



*Calendar Selector - Search Panel*

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select products from a specific region. The option **National** means that the found insurance products should be common for all regions. *Note: The list will only be filled with the regions assigned to the current logged in user and with the*



option *National*. All nationwide products and all regional products relating to the selected region will be found. If no district is selected then also all district products for districts belonging to the selected region will be found.

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select products from a specific district. *Note: The list will be only filled with the districts belonging to the selected region. All nationwide products, all regional products relating to the selected region and all district products for the selected district will be found.*

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.3).

CODE	NAME	REGION	DISTRICT	DATE FROM	DATE TO	MAXIMUM MEMBERS	LUMP SUM	CONTRIBUTION ADULT	CONTRIBUTION CHILD	INSURANCE PERIOD	GRACE PERIOD ENROLMENT	VALID FROM	VALID TO
NF01	National free enrolment	National		01/01/2015	01/01/2020	5	10,000.00	2,000.00	1,000.00	12	0	17/05/2017	
RF01	Regional free	TestRegion		01/01/2016	01/12/2025	3	5,000.00	2,000.00	500.00	12	0	01/01/2016	
DF01	District free enrolment	TestRegion	TestDistrict1	01/01/2015	01/01/2025	6	20,000.00	2,000.00	1,000.00	12	0	01/01/2016	
NX01	National fixed enrolment	National		01/01/2016	28/05/2017	100	0.00	1,000.00	500.00	12	1	29/05/2017	
RX01	Regional fixed enrolment	TestRegion		01/10/2016	01/01/2030	6	10,000.00	1,000.00	500.00	12	0	01/01/2016	
DX01	District fixed enrolment	TestRegion	TestDistrict1	01/01/2017	01/01/2024	5	5,000.00	1,000.00	2,000.00	12	1	01/01/2016	
<del>NF01</del>	<del>National free</del>	<del>National</del>	<del>-</del>	<del>01/01/2015</del>	<del>01/01/2020</del>	<del>5</del>	<del>10,000.00</del>	<del>2,000.00</del>	<del>1,000.00</del>	<del>12</del>	<del>0</del>	<del>09/05/2017</del>	<del>09/05/2017</del>
<del>DX01</del>	<del>District fixed enrolment</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>01/01/2017</del>	<del>01/01/2024</del>	<del>5</del>	<del>5,000.00</del>	<del>1,000.00</del>	<del>2,000.00</del>	<del>12</del>	<del>1</del>	<del>09/05/2017</del>	<del>09/05/2017</del>
TO01	Test product	TestRegion		01/01/2017	12/05/2017	5	10,000.00	1,000.00	2,000.00	12	0	13/05/2017	
<del>NX01</del>	<del>National fixed enrolment</del>	<del>National</del>	<del>-</del>	<del>01/01/2016</del>	<del>01/01/2024</del>	<del>100</del>	<del>0.00</del>	<del>1,000.00</del>	<del>500.00</del>	<del>12</del>	<del>1</del>	<del>09/05/2017</del>	<del>15/05/2017</del>
<del>NX01</del>	<del>National fixed enrolment</del>	<del>National</del>	<del>-</del>	<del>01/01/2016</del>	<del>01/01/2024</del>	<del>100</del>	<del>0.00</del>	<del>1,000.00</del>	<del>500.00</del>	<del>12</del>	<del>1</del>	<del>01/01/2016</del>	<del>17/05/2017</del>
<del>NF01</del>	<del>National free enrolment</del>	<del>National</del>	<del>-</del>	<del>01/01/2015</del>	<del>01/01/2020</del>	<del>5</del>	<del>10,000.00</del>	<del>2,000.00</del>	<del>1,000.00</del>	<del>12</del>	<del>0</del>	<del>01/01/2016</del>	<del>17/05/2017</del>
<del>NX01</del>	<del>National fixed enrolment</del>	<del>National</del>	<del>-</del>	<del>01/01/2016</del>	<del>01/01/2024</del>	<del>100</del>	<del>0.00</del>	<del>1,000.00</del>	<del>500.00</del>	<del>12</del>	<del>1</del>	<del>01/01/2016</del>	<del>20/05/2017</del>
NX01-1	National fixed enrolment	National		01/01/2016	01/01/2024	100	0.00	1,000.00	500.00	12	1	29/05/2017	
<del>NX01</del>	<del>National fixed enrolment</del>	<del>National</del>	<del>-</del>	<del>01/01/2016</del>	<del>01/01/2024</del>	<del>100</del>	<del>0.00</del>	<del>1,000.00</del>	<del>500.00</del>	<del>12</del>	<del>1</del>	<del>01/01/2016</del>	<del>29/05/2017</del>

Img. 1.3.3: Historical records - Result Panel

- **Search Button**

Once the criteria have been entered, use the search button to filter the records, the results will appear in the result panel.

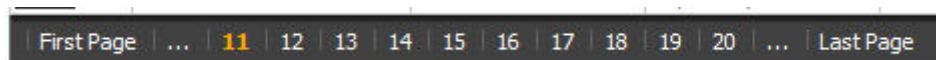
## 2. Result Panel

The result panel displays a list of all products found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.4). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

CODE	NAME	REGION	DISTRICT	DATE FROM	DATE TO	MAXIMUM MEMBERS	LUMP SUM	CONTRIBUTION ADULT	CONTRIBUTION CHILD	INSURANCE PERIOD	GRACE PERIOD ENROLMENT	VALID FROM	VALID TO
NF01	National free enrolment	National		01/01/2015	01/01/2020	5	10,000.00	2,000.00	1,000.00	12	0	17/05/2017	
RF01	Regional free	TestRegion		01/01/2016	01/12/2025	3	5,000.00	2,000.00	500.00	12	0	01/01/2016	
DF01	District free enrolment	TestRegion	TestDistrict1	01/01/2015	01/01/2025	6	20,000.00	2,000.00	1,000.00	12	0	01/01/2016	
NX01	National fixed enrolment	National		01/01/2016	28/05/2017	100	0.00	1,000.00	500.00	12	1	29/05/2017	
RX01	Regional fixed enrolment	TestRegion		01/10/2016	01/01/2030	6	10,000.00	1,000.00	500.00	12	0	01/01/2016	
DX01	District fixed enrolment	TestRegion	TestDistrict1	01/01/2017	01/01/2024	5	5,000.00	1,000.00	2,000.00	12	1	01/01/2016	
TO01	Test product	TestRegion		01/01/2017	12/05/2017	5	10,000.00	1,000.00	2,000.00	12	0	13/05/2017	
NX01-1	National fixed enrolment	National		01/01/2016	01/01/2024	100	0.00	1,000.00	500.00	12	1	29/05/2017	

Img. 1.3.4: Selected record (blue), hovered records (yellow) - Result Panel

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.5).



Img. 1.3.5: *Page selector - Result Panel*

### 3. Button Panel

With exception of the **Cancel** button, which re-directs to the [Home Page](#), and the **Add** button which re-directs to the product page, the button panel (the buttons **Edit** and **Duplicate** ) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a product has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Product Page

### 1. Data Entry

Insurance Product details

Code: RF01

Name: Regional free

Region: TestRegion

District: -- Select a District --

Date From: 01/01/2016

Date To: 01/12/2025

Conversion: -- Select Product --

Lump Sum: 5,000.00

Threshold Members: 2

Maximum Members: 3

Contribution Adult: 2,000.00

Contribution Child: 500.00

Insurance Period (months): 12

Administration Period (months): 0

Max Installments: 2

Grace Period Payment (months): 0

Grace Period Enrolment (months): 0

Grace Period Renewal (months): 0

Renewal Disc. %:

Renewal Disc. Period (months):

Check All

Medical Services

CODE	NAME	TYPE	LEVEL	PRICE	LIMIT O	LIMIT R	LIMIT E	ORIGIN	
<input checked="" type="checkbox"/>	X100	Burst Abdomen	Curative	Simple Service	60000.00	C	C	C	P
<input checked="" type="checkbox"/>	X101	Cholecystectomy	Curative	Simple Service	2000.00	C	C	C	P
<input checked="" type="checkbox"/>	X102	Caesarean Section Delivery	Curative	Simple Service	500.00	C	C	C	P

Check All

Medical Items

CODE	NAME	TYPE	PACKAGE	PRICE	LIMIT O	LIMIT R	LIMIT
<input checked="" type="checkbox"/>	Y200	ACETYLSALICYLIC ACID (ASPIRIN) TABS 300MG	Drug	400.00	C	C	C
<input checked="" type="checkbox"/>	Y201	ADRENALINE 1ML INJ 1MG/ML	Drug	500.00	C	C	C
<input checked="" type="checkbox"/>	Y203	FRUSEMIDE TABS 40 MG	Drug	500.00	C	C	C

Account Code(Remuneration): ACRF01R

Account Code(Contribution): ACRF01C

Registration Lump Sum:

Registration Fee: 1,000.00

Recurrence:

Start Cycle 1: Day Month

Start Cycle 2: Day Month

Ceiling Interpretation: Hospital

Assembly Lump Sum: 5,000.00

Assembly Fee:

Start Cycle 3: Day Month

Start Cycle 4: Day Month

Save Cancel

Grace Period Enrolment: 0

Grace Period Renewal:

Renewal Disc. %:

Renewal Disc. Period:

Enrolment Disc. %:

Enrolment Disc. Period:

Deductible Ceiling

Treatment:

Insuree:

Policy:

Extra Member Ceiling:

Maximum Ceiling:

Consultations Surgeries Deliveries Hospitalizations Antenatal Visits

Number:

Ceiling:

Distribution: NONE Period Percent Monthly Period Percent Monthly Period Percent

Capitation Payment

Level 1: Health Centre

Level 2: Dispensary

Level 3: -- Select Level --

Level 4: -- Select Level --

Sub Level 1: -- Select SubLevel

Sub Level 2: -- Select SubLevel

Sub Level 3: -- Select SubLevel

Sub Level 4: -- Select SubLevel

Share of Contribution: 60

Weight of Insured Population: 20

Weight of Number of Insured Families: 20

Weight of Population: 10

Weight of Number of Visits: 20

Weight of Number of Families: 10

Weight of Adjusted Amount: 20

Save Cancel

### Product Page

#### General

- Product Code

Enter the product code for the product. Mandatory, 8 characters.

- Product Name

Enter product name for the product. Mandatory, 100 characters maximum.

- Region

Select the region in which the product will be used, from the list by clicking on the arrow on the right hand side of the lookup. The option National means that the insurance product is nationwide and it is not constraint to a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user and with the option National.* Mandatory.

- **District**

Select the district in which the product will be used, from the list by clicking on the arrow on the right hand side of the lookup. *Note: The list will only be filled with the districts assigned to the selected region and assigned to the current logged in user. If no district is selected then the product is considered to be either nationwide (the option National is selected in the field Region) or regional associated with the selected region.*

- **Date From**

Type in the date or use the **Date Selector Button** to provide the date for which underwriting for the insurance product can be done from. **Date From** determines the earliest date from which underwriting can be done. *Note: To clear the date entry box; use the mouse to highlight the full date and then press the space key.* Mandatory.

- **Date To**

Type in the date or use the **Date Selector Button** to provide the date until which underwriting can be done to. *Note: To clear the date entry box; use the mouse to highlight the full date and then press the space key.* Mandatory.

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector ([Tab. 1](#)). By default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted. At anytime during the use of the pop-up, the user can see the date of **today**.

- Clicking on **today** will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



*Calendar Selector - Search Panel*

- **Conversion**

Select from the list of products, a reference to the product which replaces the current product in case of renewal after the **Date to**. *Note: Selecting the current product will prevent the record from saving, and cause a message to be displayed in the Information Panel.*

### Policy Amount, threshold and ceilings

- **Lump Sum**

Enter the lump sum contribution (an amount paid irrespective of the number of members up to a threshold) to be paid by a household/group for the product. If the lump sum is zero no lump sum is applied irrespective of the threshold members. Decimal up to two digits.

- **Threshold Members**

Enter the threshold number of members in product for which the lump sum is valid.

- **Number of Members**

Enter the maximal number of members of a household/group for the product.

- **Contribution Adult**

Enter the contribution to be paid for each adult (on top of the threshold number of members). Decimal up to two digits.

- **Contribution Child**

Enter the contribution to be paid for each child (on top of the threshold number of members). Decimal up to two digits.

- **Insurance Period**

Enter duration of the period in months, in which a policy with the product will be valid. Mandatory.

- **Administration Period**

Enter duration of the administration period in months. The administration period is added to the enrolment date/renewal date for determination of the policy start date.

- **Max Instalments**

Enter maximal number of instalments in which contributions for a policy may be paid. Mandatory.

- **Grace Period Payment**

Enter duration of the period in months, in which a policy has a grace period (not fully paid up) before it is suspended. Mandatory, although it is by default and can be left at zero.

- **Grace Period Enrolment**

Enter duration of the period in months after the starting date of a cycle (including this starting date), in which underwriting of a policy will still be associated with this cycle.

- **Grace Period Renewal**

Enter duration of the period in months after the starting date of a cycle (including this starting date), in which renewing of a policy will still be associated with this cycle.

- **Enrolment Discount percentage**

Enter the enrolment discount percentage for the insurance product. The discount percentage is applied on the total contributions calculated for a policy underwritten earlier than **Enrolment disc. period** months before the start date of the corresponding cycle.

- **Enrolment Discount Period**

Enter the enrolment discount period of the insurance product in months.

- **Renewal Discount Percentage**

Enter the renewal discount percentage for the insurance product. The discount percentage is applied on the total contributions calculated for a policy renewed earlier than **renewal disc. period** months before the start date of the corresponding cycle.

- **Renewal Discount Period**

Enter the renewal discount period of the insurance product in months.

- **Registration Lump Sum**

Enter the lump sum (for a household/group) for registration fee to be paid at the first enrolment of the household/group. Registration fee is not paid for renewals of policies.

- **Assembly Lump Sum**

Enter the lump sum (for a household/group) for additional assembly fee to be paid both at the first enrolment and renewals of policies.

- **Registration Fee**

Enter the registration fee per member of a household/group. If registration lump sum is non zero, registration fee is not considered. Registration fee is not paid for renewals of policies.

- **Assembly Fee**

Enter the assembly fee per member of a household/group. If assembly lump sum is non zero, assembly fee is not considered. Assembly fee is paid both at the first enrolment and renewals of policies.

### Covered Medical services

Select from the list of available medical services (from the register of Medical Services) the medical services covered within the insurance product, by either clicking on the **Check All** box at the top of the list of medical services, or by selectively clicking on the check box to the left of the medical service.

- **Medical Services Grid**

<input type="checkbox"/> Check All									
Medical Services									
	CODE	NAME	TYPE	HF LEVEL	PRICE	LIMIT O	LIMIT R	LIMIT E	ORIGIN
<input type="checkbox"/>	AOFB01	Antenatal Examination	Preventive	Simple Service	800.00	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="P"/>
<input type="checkbox"/>	COBB01	Consultation GP	Curative	Visit	200.00	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="P"/>
<input type="checkbox"/>	DEL	Delivery	Curative	Hospital case	15000.00	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="P"/>
<input type="checkbox"/>	DIFB12	Deliverv-normal	Curative	Simple Service	8000.00	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="P"/>

Img. 1.3.6: *Medical Services - Product*

- **Code**

Displays the code for the medical service

- **Name**

Displays the name of the medical service

- **Type**

Displays the type of the medical service

- **Level**

Displays the level of the medical service

- **Limit**

Indicates the type of limitation of coverage for the medical service. This may be adjusted per medical service, select between Co-Insurance [C] and Fixed amount [F]. Co-insurance means coverage of a specific percentage of the price of the medical service by policies of the insurance

product. Fixed amount means coverage up the specified limit. C is the default value. Limit O is used for claims having the type of visit Other, Limit R is used for claims having the type of visit Referral and Limit E is used for claims having the type of visit Emergency.

- **Origin**

Indicates where the price for remuneration of the service comes from. This may be adjusted per service, the options are: [P] Price taken from the price list of a claiming health facility, [O] Price taken from a claim and [R] Relative price, the nominal value of which is taken from the price list and the actual value of which is determined backwards according to available funds and volume of claimed services and medical items in a period. [R] is the default value.

- **Adult**

Indicates the limitation for adults. If the type of limitation is a co-insurance then the value is the percentage of the price covered by policies of the insurance product for adults. If the type of limitation is a fixed limit the value is an amount up to which price of the service is covered for adults by policies of the insurance product. Default is 100%. Adult O is for Other, Adult R is for Referral and Adult E is for Emergency claims according to the type of visit (Visit Type).

- **Child**

Indicates the limitation for children. If the type of limitation is a co-insurance then the value is the percentage of the price covered for children by policies of the insurance product. If the type of limitation is a fixed limit the value is an amount up to which price of the service is covered for children by policies of the insurance product. Default is 100%. Child O is for Other, Child R is for Referral and Child E is for Emergency claims according to the type of visit (Visit Type).

- **No Adult**

It indicates the maximal number of provisions of the medical service during the insurance period for an adult.

- **No Child**

It indicates the maximal number of provisions of the medical service during the insurance period for a child.

- **Waiting Period Adult**

Indicates waiting period in months (after the effective date of a policy) for an adult.

- **Waiting Period Child**

Indicates waiting period in months (after the effective date of a policy) for a child.

- **Ceiling Adult**

It indicates whether the medical service is excluded from comparison against ceilings defined in the insurance product for adults. Default is that the medical service is not excluded from comparisons with ceilings. [H] means exclusion only for provision of in-patient care, [N] means exclusion only for out-patient care and [B] means exclusion both for in-patient and out-patient care.

- **Ceiling Child**

It indicates whether the medical service is excluded from comparison against ceilings defined in the insurance product for children. Default is that the medical service is not excluded from comparisons with ceilings. [H] means exclusion only for provision of in-patient care, [N] means exclusion only for out-patient care and [B] means exclusion both for in-patient and out-patient care.

### **Covered Medical services**

Select from the list of available medical items (from the register of Medical Items) the medical items covered within the product; by either clicking on the Check All box at the



top of the list of medical items, or by selectively clicking on the check box to the left of the medical item.

- medical items grid

<input type="checkbox"/> Check All											
Medical Items											
	CODE	NAME	TYPE	PACKAGE	PRICE	LIMIT O	LIMIT R	LIMIT E	ORIGIN	ADULT O	ADULT R
<input type="checkbox"/>	GBBB09	Acetylsalicylic Acid	Drug	Tabs	300.00	C	C	C	P	100.00	100.00
<input type="checkbox"/>	GBBC01	Ampicilin PDR	Drug	Tabs	400.00	C	C	C	P	100.00	100.00

Img. 1.3.7: *Medical Items - Product*

- Code

Displays the code for the medical item

- Name

Displays the name of the medical item

- Type

Displays the type of the medical item

- Package

Displays the packaging of the medical Item

- Limit

Indicates the type of limitation of coverage for the medical item. This may be adjusted per medical item, select between Co-Insurance [C] and Fixed amount [F]. Co-insurance means coverage of a specific percentage of the price of the medical item by policies of the insurance product. Fixed amount means coverage up the specified limit. C is the default value. Limit O is used for claims having the type of visit Other, Limit R is used for claims having the type of visit Referral and Limit E is used for claims having the type of visit Emergency.

- Origin

It indicates where the price for remuneration of the item, comes from: This may be adjusted per medical item, the options are: [P] Price taken from the price list of a claiming health facility, [O] Price taken from a claim and [R] Relative price, the nominal value of which is taken from the price list and the actual value of which is determined backwards according to available funds and the volume of claimed services and medical items in a period. [R] is the default value.

- Adult

It indicates the limitation for adults. If the type of limitation is a co-insurance then the value is the percentage of the price covered for adults by policies of the insurance product. If the type of limitation is a fixed limit the value is an amount up to which price of the item is covered for adults by policies of the insurance product. Default is 100%. Adult O is for Other, Adult R is for Referral and Adult E is for Emergency claims according to the type of visit (Visit Type).

- Child

It indicates the limitation for children. If the type of limitation is a co-insurance then the value is the percentage of the price covered for children by policies of the insurance product.



If the type of limitation is a fixed limit the value is an amount up to which price of the service is covered for children by policies of the insurance product. Default is 100%. Child O is for Other, Child R is for Referral and Child E is for Emergency claims according to the type of visit (Visit Type).

- **No Adult**

It indicates the maximal number of provisions of the medical item during the insurance period for an adult.

- **No Child**

It indicates the maximal number of provisions of the medical item during the insurance period for a child.

- **Waiting Period Adult**

It indicates waiting period in months (after the effective date of a policy) for an adult.

- **Waiting Period Child**

It indicates waiting period in months (after effective date of a policy) for a child.

- **Ceiling Adult**

It indicates whether the medical item is excluded from comparison against ceilings defined for adults in the insurance product. The default is that the medical item is not excluded from comparisons with ceilings. [H] means exclusion only for provision of in-patient care, [N] means exclusion only for out-patient care and [B] means exclusion both for in-patient and out-patient care.

- **Ceiling Child**

It indicates whether the medical item is excluded from comparison against ceilings defined for children in the insurance product. The default is that the medical item is not excluded from comparisons with ceilings. [H] means exclusion only for provision of in-patient care, [N] means exclusion only for out-patient care and [B] means exclusion both for in-patient and out-patient care.

- **Account Code Remuneration**

Enter the account code of the insurance product used in the accounting software for remuneration of the product. 25 characters maximum.

- **Account Code Contribution**

Enter the account code of the insurance product used in the accounting software for paid contributions. 25 characters maximum.

### **policy lenght and start**

- **Recurrence**

Enter duration of the period in months after which registration fee/lump sum is applied again for a renewal. The period starts with the expiry date of the policy to be renewed.

- **Start Cycle 1**

- **Start Cycle 2**

- **Start Cycle 3**

- **Start Cycle 4**

If one or more starting dates (a day and a month) of a cycle are specified then the insurance product is considered as the insurance product with fixed enrolment dates. In this case, activation of underwritten and renewed policies is accomplished always on fixed dates during a year. Maximum four cycle dates can be specified.

### **Deductibles and Ceiling**

Specify whether Hospital and Non-Hospital care should be determined according to the type of health facility (select [Hospital]) that provided health care or according to the type of health care (select [In-patient]) acquired from a claim. In the first case all health care provided in hospitals (defined in the field **HF Level** in the register of Health Facilities) is accounted for **Hospital Ceilings/Deductibles** and for calculation of relative prices for the **Hospital** part. It means that if claimed health care was provided out-patient in a hospital, it is considered for calculation of ceilings/deductibles and for calculation of relative prices as hospital care. In the second case only in-patient care (determined from a claim when a patient spent at least one night in a health facility) is accounted for **Hospital Ceilings/Deductibles** and for calculation of relative prices for hospital part. Other health care including out-patient care provided in hospitals is accounted for **Non hospital Ceilings/Deductibles** and also such health care is used for calculation of relative prices for non-hospital part. Mandatory.

- **Treatment**

Deductibles and Ceilings for treatments may be entered for general care (**Hospitals and Non-hospitals**) or for hospital care (**Hospitals**) only and/or for non-hospital care (**Non-Hospitals**) only. An amount may be set, indicating the value that a patient should cover within his/her own means, before a policy of the insurance product comes into effect (**Deductibles**) or the ceiling (maximum amount covered) within a policy of the insurance product (**Ceilings**) for a treatment (the treatment is identified health care claimed in one claim)

- **Insuree**

Deductibles and Ceilings for an insuree may be entered for general care (**Hospitals and Non-hospitals**) or for hospital care (**Hospitals**) only and/or for non-hospital care (**Non-Hospitals**) only. An amount may be set, indicating the value that an insuree should cover within his/her own means, before a policy of the insurance product comes into effect (**Deductibles**) or the ceiling (maximum amount covered) within a policy of the insurance product (**Ceilings**) for an insuree for the whole insurance period.

- **Policy**

Deductibles and Ceilings for a policy may be entered for general care (**Hospitals and Non-hospitals**) or for hospital care (**Hospitals**) only and/or for non-hospital care (**Non-Hospitals**) only. An amount may be set, indicating the value that policy holders should cover within their own means, before a policy of the insurance product comes into effect (**Deductibles**) or the ceiling (maximum amount covered) for the policy (all members of a family/group) of the insurance product (**Ceilings**) for the whole insurance period.

- **Extra Member Ceiling**

Additional (extra) ceiling for a policy may be entered for general care (**Hospitals and Non-hospitals**) or for hospital care (**Hospitals**) only and/or for non-hospital care (**Non-Hospital s**) only per a member of a family/group above **Threshold Members**.

- **Maximum Ceiling**

Maximal ceiling for a policy may be entered for general care (**Hospitals and Non-hospitals**) or for hospital care (**Hospitals**) only and/or for non-hospital care (**Non-Hospitals**) only if extra ceilings are applied for members of a family/group above **Threshold Members**.

- **Number**

Maximal number of covered claims per an insuree during the whole insurance period according to the category of a claim. The options are claims of the category **Consultations**, **Surgery**, **Delivery** and **Antenatal care**. Maximal numbers may be also specified for Hospitalizations (in-patient stays) and (out-patient visits) **Visits**. The claim category is determined as follows:

If at least one service of the category *Surgery* is given in the claim it is of category *Surgery*  
 otherwise  
 if at least one service of the category *Delivery* is given in the claim it is of category *Delivery*  
 otherwise  
 if at least one service of the category *Antenatal care* is given in the claim it is of category *Antenatal care*  
 otherwise  
 if the claim is a hospital one the claim it is of category *Hospitalization*  
 otherwise  
 if at least one service of the category *Consultation* is given in the claim it is of category *Consultation*  
 otherwise  
 the claim is of the category *Visit*

- **Ceiling**

Maximal amount of coverage can be specified for claims according to the category of a claim. The options are claims of the category **Consultations**, **Surgery**, **Delivery**, **Antenatal care**, **Hospitalizations**, and **Visits**. The category of claim is determined according to the procedure described with **Number**.

*Note. It is possible to specify only one of the following ceilings –per Treatment, per Insuree or per Policy. If ceilings per category of claims are specified together with ceilings per Treatment, per Insuree or per Policy than evaluation of claims may be dependent under special circumstances on the order of claimed medical services/items in a claim.*

## Health fund management

- **distribution Period**

Distribution periods may be entered for general care (**Hospitals** and **Non-hospitals**), or for hospital care (**Hospitals**) only and/or for non-hospital care (**Non-Hospitals**) only. Select from the list (**NONE**, **Monthly**, **Quarterly**, **Yearly**), the period that is to be used for calculation of the actual value of relative prices for the insurance product; by clicking on the arrow on the right. The default value is '**NONE**' which means that relative prices are not calculated for general health care or for hospital care or non-hospital care within the insurance product. By selecting **Monthly**, **Quarterly** or **Yearly** will cause a pop-up ([Tab. 1](#)) with the relative periods (1 period for yearly, 4 for quarterly, 12 for monthly). Percentages should be entered to indicate the distribution over the periods as per the product description. Enter to each field an appropriate percentage of paid contributions for policies of the insurance product allocated proportionally to corresponding calendar period. It means, for example, that in case of the distribution **Monthly** we put in each slot percentage of paid contributions of the insurance product that are allocated to the corresponding month and that is to be used for calculation of relative prices.

It is not required to enter a value in each period, zero values are accepted. Once all the percentage values have been entered, click on the button **OK** to submit the values to the respective grid. Clicking on the button **Cancel** will cancel the action closing the popup and cancelling the change in the distribution.

The image displays three sequential screenshots of a software dialog box titled "Period Percent".

- First Screenshot:** A vertical list of 12 periods, each with a text input field containing "0.00". At the bottom are "OK" and "CANCEL" buttons.
- Second Screenshot:** A smaller version of the dialog box showing only the first 4 periods, each with a text input field containing "2.00". At the bottom are "OK" and "CANCEL" buttons.
- Third Screenshot:** An even smaller version of the dialog box showing only the first period with a text input field containing "0.00". At the bottom are "OK" and "CANCEL" buttons.

*Distribution Periods (Monthly – Quarterly – Yearly) - Product)*

### Capitation Payment

The section allows definition of parameters of a capitation formula used for remuneration of selected levels of health facilities within the insurance product. The report *Capitation Payment* is used for calculation of the amount of capitation payment for individual health facilities. The parameters of the capitation formula are the following:

- **Level 1**

The first level of health facilities can be selected that should be included in the calculation of capitation payments. The options are the following levels of a health facility: Dispensary, Health Centre, and Hospital.

- **Sub Level 1**

The sub-level of the first level of health facilities can be selected that should be included in calculation of capitation payments. If the sub level is not selected, all health facilities of the specified level are included irrespective of their sub-level.

- **Level 2**

The second level of health facilities can be selected that should be included in the calculation of capitation payments. The options are the following levels of a health facility: Dispensary, Health Centre, and Hospital.

- **Sub Level 2**

The sub-level of the second level of health facilities can be selected that should be included in calculation of capitation payments. If the sub level is not selected, all health facilities of the specified level are included irrespective of their sub-level.

- **Level 3**

The third level of health facilities can be selected that should be included in the calculation of capitation payments. The options are the following levels of a health facility: Dispensary, Health Centre, and Hospital.

- **Sub Level 3**

The sub-level of the third level of health facilities can be selected that should be included in calculation of capitation payments. If the sub level is not selected, all health facilities of the specified level are included irrespective of their sub-level.

- **Level 4**

The fourth level of health facilities can be selected that should be included in the calculation of capitation payments. The options are the following levels of a health facility: **Dispensary**, **Health Centre**, and **Hospital**.

- **Sub Level 4**

The sub-level of the fourth level of health facilities can be selected that should be included in calculation of capitation payments. If the sub level is not selected, all health facilities of the specified level are included irrespective of their sub-level.

- **Share of Contribution**

The share of allocated contributions for given insurance product and the period specified for the report Capitation Payment that should be used for calculation of capitation payments for individual health facilities. The amount specified is interpreted as a percentage.

- **Weight of Population**

The weight can be entered that is used for the number of population living in catchments areas of individual health facilities. The amount specified is interpreted as a percentage.

- **Weight of Number of Families**

The weight can be entered that is used for the number of families living in catchments areas of individual health facilities. The amount specified is interpreted as a percentage.

- **Weight of Insured Population**

The weight can be entered that is used for the number of insured population by given insurance product and living in catchments areas of individual health facilities. The amount specified is interpreted as a percentage.

- **Weight of Number of Insured Families**

The weight can be entered that is used for the number of insured families by given insurance product and living in catchments areas of individual health facilities. The amount specified is interpreted as a percentage.

- **Weight of Number of Visits**

The weight can be entered that is used for the number of contacts of insured by given insurance product and living in catchments areas of individual health facilities. The amount specified is interpreted as a percentage.

- **Weight of Adjusted Amount**

The weight can be entered that is used for the adjusted amount on claims for insured by given insurance product and living in catchments areas of individual health facilities. The amount specified is interpreted as a percentage.

*Note. The capitation formula is defined as follows:*

$$\text{CapitationPayment}_i = \sum_a \left( \text{Indicator}_i^a \times \frac{\text{AllocatedContribution} \times \text{ShareContribution} \times \text{Share}^a}{\sum_i \text{Indicator}_i^a} \right)$$

*Where*

$\text{CapitationPayment}_i$  is the amount of capitation payment for  $i$ -th health facility

$\text{Indicator}_i^a$  is the value of the indicator of the type  $a$  for the  $i$ -th health facility.  $\text{Indicator}_i^a$  may be:

- *Population living in catchments area of the health facility*
- *Number of families living in catchments area of the health facility*
- *Insured population living in catchments area of the health facility*
- *Insured number of families living in catchments area of the health facility*

- *Number of claims (contacts) with the health facility by insured in the catchment area*
- *Adjusted amount*

*AllocatedContribution is the amount of contributions for given insurance product for given period*

*ShareContribution is the formula parameter Share of contribution*

*Share<sup>a</sup> is the weight of the indicator of the type a .*

*Share<sup>a</sup> may be:*

- *Weight of Population*
- *Weight of Number of Families*
- *Weight of Insured Population*
- *Weight of Number of Insured Families*
- *Weight of Number of Visits*
- *Weight of Adjusted Amount*

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Product Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the product has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Product Control Page*.

## Adding a Product

Click on the **Add** button to re-direct to the *Product Page*.

When the page opens all entry fields are empty. See the *Product Page* information on the data entry and mandatory fields.

## Editing a Product

Click on the **Edit** button to re-direct to the *ProductPage*.

The page will open with the current information loaded into the data entry fields. See the *Product Page* for information on the data entry and mandatory fields

## Duplicating a Product

Click on the **Duplicate** button to re-direct to the *Product Page*.

The page will open with all the current information for the selected product, (except for the product code which should be unique), loaded into the data entry fields. See the *Product Page* for information on the data entry and mandatory fields. To save the record, enter a unique code before clicking on **Save**.

## Deleting a Product

Because of potential problems with synchronization of data between off-line and on-line version, it is not possible delete insurance products currently.

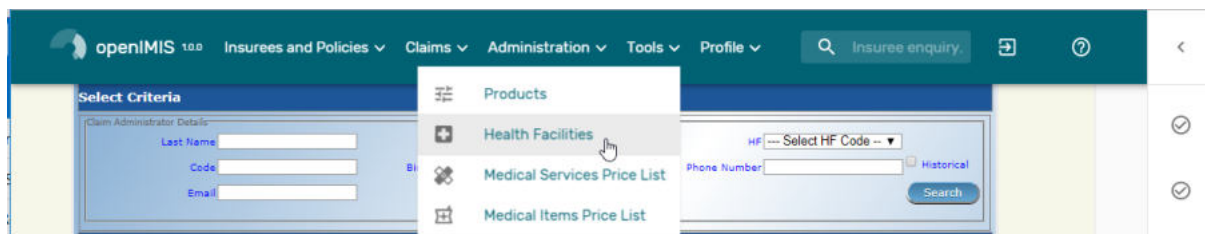
### 1.3.2 Health Facilities Administration

The register of health facilities contains all health facilities contracted and/or eligible for submitting of claims by/to the health insurance scheme. Health Facility administration is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Health Facilities.

#### Pre-conditions

A health facility may only be added if the management of the scheme administration contracts it or if eligibility of submitting of claims can be derived from the legislation. It may thereafter be edited; however, approval of the management of the scheme administration is required for a change of the pricelists associated with the health facility. Deletion of a health facility normally will occur when a Health Facility stops its activity or the contract with the health facility with the scheme administration is cancelled.

#### Navigation



Img. 1.3.8: *Navigation Health Facilities*

All functionality for use with the administration of health facilities can be found under the main menu **Administration**, sub menu **Health Facilities**.

Clicking on the sub menu **Health Facilities** re-directs the current user to the *Health Facilities Control Page*.

#### Health Facilities Control Page

The **Health Facilities Control Page** is the central point for all health facilities administration. By having access to this page, it is possible to add, edit, delete and search. The page is divided into four panels (Img. 1.3.12)

##### 1. Search Panel

The Search Panel allows a user to select specific criteria to minimise the search results. In the case of health facilities the following search options are available which can be used alone or in combination with each other.

- Code

Type in the beginning of; or the full **Code**; to search for health facilities with a **Code**, which starts with or matches completely, the typed text.

The screenshot displays the 'Health Facility JMHOS001' control page. The top navigation bar includes 'openIMIS 1.1.0' and various menu items like 'Insurees and Policies', 'Claims', 'Administration', 'Tools', and 'Profile'. A search bar is also present. The main form contains the following fields:

- Region:** R1M UlthaMod
- District:** R1D2 Jambero
- Health Facility Legal Form:** Government
- Health Facility Level:** Hospital
- Health Facility Sub Level:**
- Care Type:** In & Out - Patient
- Code:** JMHOS001
- Name:** Jambero District Hospital
- Address:** Lantern Road 21, P.O.Box 3425
- Phone:** dsfsd
- Fax:** sdfds
- Email:** sdfsd

Below the form, there are three panels for selection:

- Regions:** R1M - UlthaMod, R2 - Tahida
- Districts:** R1D1M - Rapta, R1D2 - Jambero, R1D3 - Uptol
- Municipalities:** R1D2M1 - Actoloby, R1D2M2 - Remorlogy

At the bottom, the 'Village Catchments' table is shown:

Village Catchment	Percentage
R1D2M1V1 - Holobo	% 8
R1D2M1V2 - Octo	% 9
R1D2M1V3 - Raberjab	% 100
dfgdsqfd - dsfsg	%

Img. 1.3.9: *Health Facilities Control Page*

- **Name**

Type in the beginning of; or the full **Name**; to search for health facilities with a **Name**, which starts with or matches completely, the typed text.

- **Fax**

Type in the beginning of; or the full **Fax** to search for health facilities with a **Fax**, which starts with or matches completely, the typed number.

- **Level**

Select the **Level**; from the list of levels of health facilities (Dispensary, Health Centre, Hospital) by clicking on the arrow on the right of the selector, to select health facilities of a specific level of service.

- **Phone Number**

Type in the beginning of; or the full **Phone Number** to search for health facilities with a **Phone Number**, which starts with or matches completely, the typed number.

- **Email**

Type in the beginning of; or the full **Email** to search for health facilities with an **Email** which starts with or matches completely, the typed text.

- **Legal Form**

Select the **Legal Form**; from the list of legal forms (Government, District organization, Private Organisation, Charity) by clicking on the arrow on the right of the selector, to select health facilities of a specific legal form.

- **Region**

Select the **Region**; from the list of districts by clicking on the arrow on the right of the selector to select health facilities from a specific region. *Note: The list will only*



be filled with the regions assigned to the current logged in user. If this is only one then this region will be automatically selected.

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select health facilities from a specific district. *Note: The list will only be filled with the districts that belong to the selected region and that are assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- **Care Type**

Select the **Care Type** from the list of types (In-patient, Out-patient, Both) of provided health care by clicking on the arrow on the right of the selector, to select health facilities with a specific type.

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.10)

⌂

### 2 Health Facilities Found

Code	Name	Legal Form	Level	Care Type	Phone	Fax	Email	Region	District	Id	Validity From	Validity To	
RAHOS001	Rapta District Hospital	Government	Hospital	In & Out - Patient				R1 - Ultha	R1D1 - Rapta	2	1/1/2017		
RAHO001	Rapta District Hospital	Government	Hospital	In & Out - Patient				R1 - Ultha	R1D1 - Rapta	3	1/1/2016	12/31/2016	

Rows Per Page 10 1-2 of 2 < >

Img. 1.3.10: *Historical Records - Result Panel*

- **Search button**

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The result panel displays a list of all health facilities found, matching the selected Criteria in the search panel. The currently selected record is highlighted with light grey (Img. 1.3.11). The rightmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

JMHOS001	Jambero District Hospital	Government	Hospital	In & Out - Patient				R1 - Ultha	R1D2 - Jambero	
RAHOS001	Rapta District Hospital	Government	Hospital	In & Out - Patient				R1 - Ultha	R1D1 - Rapta	
UPHOS001	Uptol District Hospital	Government	Hospital	In & Out - Patient				R1 - Ultha	R1D3 - Uptol	
ROHOS001	Rajo District Hospital	Government	Hospital	In & Out - Patient				R2 - Tahida	R2D1 - Rajo	
VIHOS001	Vida District Hospital	Government	Hospital	In & Out - Patient				R2 - Tahida	R2D2 - Vida	

Img. 1.3.11: *Selected record (blue), hovered records (yellow) - Result Panel*

A maximum of 10 records are displayed at one time( can be changed:numref:mat\_page\_browser), further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.2.35)

### 3. Button Panel

With exception of the **Cancel** button, which re-directs to the [Home Page](#), and the **Add** button which re-directs to the health facility page, the button panel (the buttons **Edit** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should select first a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a health facility has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Health Facility Page

### 1. Data Entry

The screenshot displays the 'Health Facility JMHOS001' page in the openIMIS 1.1.2 interface. The top navigation bar includes links for Insureds and Policies, Claims, Administration, Tools, and Profile. A search bar is present with the text 'Insureds enquiry...'. The main form contains several input fields: Region (R1M UlthaMod), District (R1D2 Jamboro), Health Facility Legal Form (Government), Health Facility Level (Hospital), Health Facility Sub Level, and Care Type (In & Out - Patient). Below these are fields for Code (JMHOS001), Name (Jamboro District Hospital), Address (Lantern Road 21 P.O.Box 3425), Phone (dsfsd), Fax (sdfds), and Email (sdfsd). There are also dropdown menus for Services Price List (Ultha Govt. Hospital List) and Items Price List. At the bottom, there are three selection panels: Regions (R1M - UlthaMod, R2 - Tahida), Districts (R1D1M - Rapta, R1D2 - Jamboro, R1D3 - Uptol), and Municipalities (R1D2M1 - Actoloby, R1D2M2 - Remorlogy). A Village Catchments table is also visible, showing entries like R1D2M1V1 - Holobo with a percentage of 8, R1D2M1V2 - Octo with 9, and R1D2M1V3 - Raberjab with 100. A plus button is located at the bottom right.

Img. 1.3.12: Health Facility Page

- **Code**

Enter the code for the health facility. Mandatory, 8 characters.

- **name**

Enter the name for the health facility. Mandatory, 100 characters maximum.

- **Legal Form**

Select the legal form of the health facility from the list (Government, District organization, Private Organisation, Charity), by clicking on the arrow on the right hand side of the lookup. Mandatory.

- **Level**

Select a level from the list levels (Dispensary, Health Centre, Hospital), by clicking on the arrow on the right hand side of the lookup. Mandatory.

- **Sub Level**

Select a sub-level from the list sub-levels (No Sublevel, Integrated, Reference), by clicking on the arrow on the right hand side of the lookup. Mandatory.

- **Address**

Enter the address of the health facility. Mandatory, 100 characters maximum.

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to enter the region in which the health facility is located. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then this region will be automatically selected.* Mandatory.

- **District**

Select the **district**; from the list of districts by clicking on the arrow on the right of the selector to enter the district in which the health facility is located. *Note: The list will only be filled with the districts assigned to the selected region and to districts assigned to the currently logged in user. If this is only one then the district will be automatically selected.* Mandatory.

- **Phone Number**

Enter the phone number for the health facility. 50 characters maximum.

- **Fax**

Enter the fax number for the health facility. 50 characters maximum.

- **Email**

Enter the email for the health facility. 50 characters maximum.

- **Care Type**

Select the type of health care provided by the health facility from the list (In-patient, Out-patient, Both), by clicking on the arrow on the right hand side of the lookup. Mandatory.

- **Price Lists (Medical Services)**

Select the health facilities price lists (for medical services) from the list by clicking on the arrow on the right hand side of the lookup. The pricelist contains the list of medical services and their prices agreed between the health facility (or corresponding group of health facilities) and the scheme administration which can be invoiced by the health facility and remunerated by the scheme administration. *Note: The list will only be filled with the pricelists associated with the previously selected district, regional and nationwide pricelists assigned to the current logged in user.*

- **Price Lists (Medical Items)**

Select the health facilities price lists (medical items) from the list by clicking on the arrow on the right hand side of the lookup. The pricelist contains the list of medical items and their prices agreed between the health facility (or corresponding group of health facilities) and the scheme administration which can be invoiced by the health facility and remunerated by the scheme administration. *Note: The list will only be filled with the pricelists associated with the previously selected district, regional and nationwide pricelists assigned to the current logged in user.*

- **Account Code**

Enter the account code (Identification for the accounting software), which will be used in reports on remuneration to be received by the health facility. 25 characters maximum.

- **Region, District, Municipality, Village, Catchment grid**

Check the locations that define the catchment area of the health facility. Specify the percentage of the population of a village that belong to the catchment area in the catchment column. Default is 100%.

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the **Health Facility Control Page**, with the newly saved record displayed and selected in the result panel. A message confirming that the health facility has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Health Facilities Control Page*.

## Adding a Health Facility

Click on the **Add** button to re-direct to the *Health Facility Page*

When the page opens all entry fields are empty. See the *Health Facility Page* for information on the data entry and mandatory fields.

## Editing a Health Facility

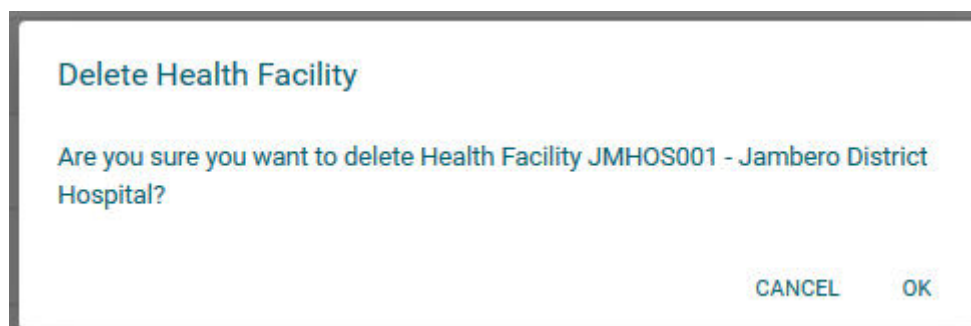
Double click on the line to be re-directed to the *Health Facility Page* .

The page will open with the current information loaded into the data entry fields. See the *Health Facility Page* for information on the data entry and mandatory fields

## Deleting a Health Facility

Click on the **Delete** button to delete the currently selected record.

Before deleting a confirmation popup (Img. 1.3.13) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.3.13: Delete confirmation- Button Panel

When a health facility is deleted, all records retaining to the deleted health facility will still be available by selecting historical records.

### 1.3.3 Medical Services Administration

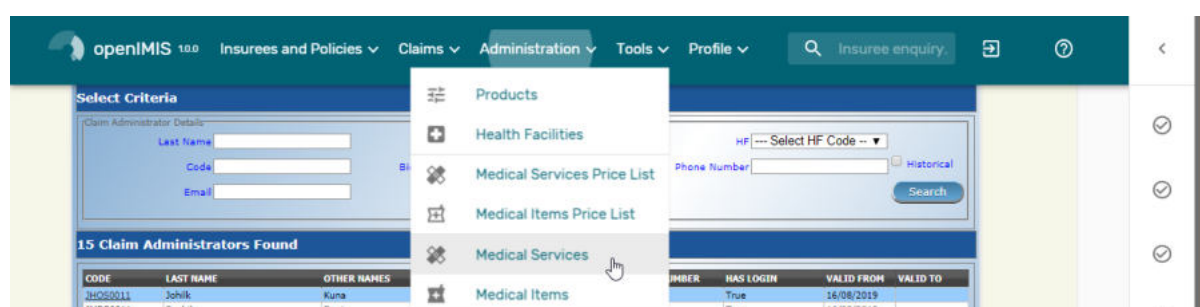
The register of Medical Services contains all medical services that can be included in packages of benefits of insurance products administered and remunerated by the health insurance scheme. Administration of the register of medical services is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Medical Services.

#### Pre-conditions

A medical service may only be added or thereafter edited or deleted, after the approval of the management of the scheme administration.

#### Navigation

All functionality for use with the administration of Medical Services can be found under the main menu **Administration**, sub menu **Medical Services**.



Img. 1.3.14: *Navigation Medical Services*

Clicking on the sub menu **Medical Services** re-directs the current user to the *Medical Services Control Page*.

#### Medical Services Control Page

The **Medical Services Control Page** is the central point for all medical service administration. By having Access to this panel, it is possible to add, edit, delete and search. The panel is divided into four panels (Img. 1.3.15)

##### 1. Search Panel

The Search Panel allows a user to select specific criteria to minimise the search results. In the case of medical services the following search options are available which can be used alone or in combination with each other.

- **Code**

Type in the beginning of; or the full **Code**; to search for medical services with a **Code**, which starts with or matches completely, the typed text.

- **Name**

Type in the beginning of; or the full **Name** to search for medical services with a **Name**, which starts with or matches completely, the typed text.

**Select Criteria**

Medical Service Details

**A** Code  Name  Type -- Select Service Type -- ☐ Historical

**13 Services Found**

CODE	NAME	TYPE	HF LEVEL	PRICE	VALID FROM	VALID TO
AOFB01	Antenatal Examination	Preventive	Simple Service	800.00	01/01/2015	
COBB01	Consultation GP	Curative	Visit	200.00	01/01/2015	
DEL	Delivery	Curative	Hospital Case	15,000.00	08/11/2016	
DIFB12	Delivery-normal	Curative	Simple Service	8,000.00	01/01/2015	
<b>B</b> COBB01	Urine Analysis	Curative	Simple Service	500.00	01/01/2015	
COBB02	Gastronomy	Curative	Simple Service	4,000.00	01/01/2015	
GBBX	Tracheostomy	Curative	Simple Service	20,000.00	29/11/2016	
GOMA01	Burst Abdomen	Curative	Simple Service	1,000.00	01/01/2015	
HOSP	Inpatient Hospitalization	Curative	Hospital Case	25,000.00	08/11/2016	
OPD	Outpatient Consultation	Curative	Simple Service	15,000.00	08/11/2016	
SIBB51	Colostomy	Curative	Simple Service	5,000.00	01/01/2015	
SIFA01	Mastectomy	Curative	Simple Service	2,000.00	01/01/2015	
SURG	Surgery	Curative	Hospital Case	70,000.00	08/11/2016	

Img. 1.3.15: Medical Services Control Page

- Type

Select the Type; from the list of types (Preventive, Curative) by clicking on the arrow on the right of the selector, to select medical services of a specific type.

- Historical

Click on Historical to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.16)

CODE	NAME	TYPE	LEVEL	PRICE	VALID FROM	VALID TO
<del>1</del>	<del>1</del>	<del>Preventive</del>	<del>Simple Service</del>	<del>1.00</del>	<del>14/08/2012</del>	<del>14/08/2012</del>
<del>1</del>	<del>1</del>	<del>Preventive</del>	<del>Simple Service</del>	<del>1.00</del>	<del>14/08/2012</del>	<del>14/08/2012</del>
<del>111112</del>	<del>MS</del>	<del>Preventive</del>	<del>Visit</del>	<del>9,000.00</del>	<del>14/08/2012</del>	<del>14/08/2012</del>
<del>111112</del>	<del>MS</del>	<del>Preventive</del>	<del>Visit</del>	<del>9,000.00</del>	<del>14/08/2012</del>	<del>14/08/2012</del>
3102	Sara Chadali	Curative	Simple Service	500.00	15/08/2012	
12	Cervix Repair	Curative	Simple Service	2,000.00	15/08/2012	
13	Colpotomy	Curative	Simple Service	2,500.00	15/08/2012	
<del>11</del>	<del>Cervical Cerclage Shredliar</del>	<del>Curative</del>	<del>Hospital Case</del>	<del>3,000.00</del>	<del>15/08/2012</del>	<del>15/08/2012</del>

Img. 1.3.16: Historical records - Result Panel

- Search Button

Once the criteria have been entered, use the search button to filter the records, the results will appear in the result panel.

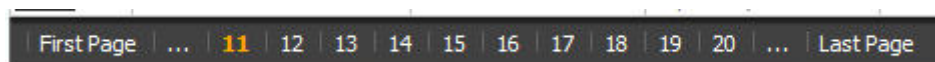
## 2. Result Panel

The Result Panel displays a list of all medical services found, matching the selected Criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.17). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.18).

CODE	NAME	TYPE	LEVEL	PRICE	VALID FROM	VALID TO
<a href="#">3102</a>	Sara Chadali	Curative	Simple Service	500.00	15/08/2012	
<a href="#">12</a>	Cervix Repair	Curative	Simple Service	2,000.00	15/08/2012	
<a href="#">13</a>	Colpotomy	Curative	Simple Service	2,500.00	15/08/2012	
<a href="#">M20</a>	Tonsilectomy	Curative	Simple Service	5,000.00	15/08/2012	
<a href="#">P1</a>	Biopsy-cervical	Curative	Simple Service	500.00	15/08/2012	
<a href="#">P10</a>	Biopsy-skin	Curative	Simple Service	350.00	15/08/2012	
<a href="#">P26</a>	Flap Excision	Curative	Simple Service	600.00	15/08/2012	

Img. 1.3.17: Selected record (blue), hovered records (yellow) - Result Panel



Img. 1.3.18: Page Selector - Result Panel

### 3. Button Panel

With exception of the cancel button, which re-directs to the *Home Page*, the button panel (the buttons **End** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a medical service has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Medical Service Page

### 1. Data Entry

 A screenshot of the 'Medical Service Details' form. The form has a light blue header and a white body. It contains the following fields and controls:
 

- Code**: A text input field.
- Name**: A text input field.
- Type**: Radio buttons for 'Preventive' and 'Curative'.
- Category**: A dropdown menu with '-- Select Level --'.
- HF Level**: A dropdown menu with '-- Select HF Level--'.
- Price**: A text input field.
- Care Type**: Radio buttons for 'Out-Patient', 'In-Patient', and 'Both'.
- Frequency**: A text input field with the value '0'.
- Patient**: Checkboxes for 'Man', 'Woman', 'Adult', and 'Child'.

 At the bottom of the form are two buttons: 'Save' on the left and 'Cancel' on the right.

Img. 1.3.19: Medical Service Page

- **Code**  
Enter the code for the medical service. Mandatory, 6 characters.
- **Name**  
Enter the name of the medical service. Mandatory, 100 characters maximum.
- **Category**  
Choose the category (Surgery, Consultation, Delivery, Antenatal, Other) which the medical service belongs to.
- **Type**



Choose one from the options available (Preventive, Curative), the type of the medical service. Mandatory.

- **Level**

Select from the list (Simple Service, Visit, Day of Stay, Hospital Case), the level for the medical service. Mandatory.

- **Price**

Enter the price a general price that can be overloaded in pricelists. Full general price (including potential cost sharing of an insuree) for the medical service. Mandatory.

- **Care Type**

Choose one from the options available (Out-patient, In-patient, Both), the limitation of provision of the medical service to the specific type of health care. Mandatory.

- **Frequency**

Enter the limitation of frequency of provision in a number of days within which a medical service can be provided to a patient not more than once. If the frequency is zero, there is no limitation. *Note: By default the frequency is 0.*

- **Patient**

Choose one or a combination of the options available, to specify which patient type the medical service is applicable to. *Note: By default all patient options are checked (selected).*

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Medical Services Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the medical service has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Medical Services Control Page*.

## Adding a Medical Service

Click on the **Add** button to re-direct to the *Medical Service Page*.

When the page opens all entry fields are empty. See the *Medical Service Page* for information on the data entry and mandatory fields.

## Editing a Medical Service

Click on the **Edit** button to re-direct to the *Medical Service Page*.

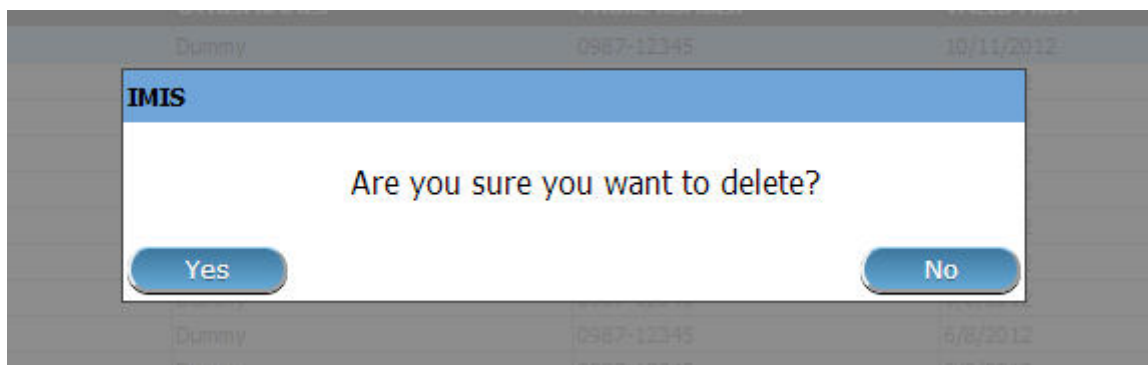
The page will open with the current information loaded into the data entry fields. See the *Medical Service Page* for information on the data entry and mandatory fields.

## Deleting a Medical Service

Click on the **Cancel** button to delete the currently selected record; the user is re-directed the *Medical Services Control Page*.



Before deleting a confirmation popup (Img. 1.3.20) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.3.20: Delete confirmation- Button Panel

When a medical service is deleted, all records retaining to the deleted medical service will still be available by selecting historical records.

### 1.3.4 Medical Items Administration

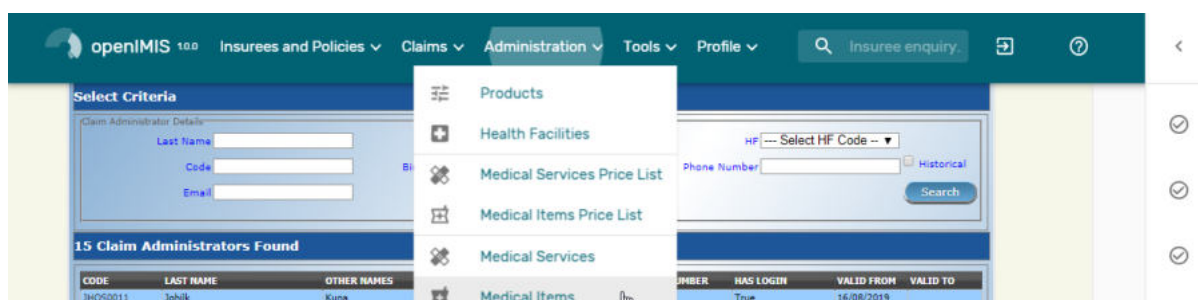
The register of Medical Items contains all medical items (drugs, prostheses) that can be included in packages of benefits of insurance products within the health insurance scheme and are remunerated by the scheme administration. Administration of the register of medical items is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Medical Items.

#### Pre-conditions

A medical item may only be added or thereafter edited or deleted, after the approval of the management of the scheme administration.

#### Navigation

All functionality for use with the administration of medical items can be found under the main menu **Administration**, sub menu **Medical Items**



Img. 1.3.21: Navigation Medical Items

Clicking on the sub menu **Medical Items** re-directs the current user to the *Medical Items Control Page*.

**Select Criteria**

Medical Item Details

**A**

Code  Name  Type -- Select Item Type --  
 Package  ☐ Historical

**4 Items Found**

CODE	NAME	TYPE	PACKAGE	PRICE	VALID FROM	VALID TO
GBB009	Acetylsalicylic Acid	Drug	Tab	300.00	01/01/2015	
GBBC01	Ampicilin PDR	Drug	Tab	400.00	01/01/2015	
<b>B</b> GBX003	Albendazole Tab.	Drug	100 tablets	500.00	12/12/2016	
GBX004	Bendrofluazide	Drug	100 tablets	400.00	12/12/2016	

**C**

**D**

Img. 1.3.22: Medical Items Control Page

## Medical Items Control Page

The **Medical Items Control Page** is the central point for all medical item administration. By having access to this page, it is possible to add, edit, delete and search. The panel is divided into four panels (Img. 1.3.22)

### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of medical items the following search options are available which can be used alone or in combination with each other.

- **Code**

Type in the beginning of; or the full **Code**; to search for medical items with a **Code**, which starts with or matches completely, the typed text.

- **Name**

Type in the beginning of; or the full **Name** to search for medical items with a **Name**, which starts with or matches completely, the typed text.

- **Type**

Select the **Type**; from the list of types (Drugs, Medical Prostheses) by clicking on the arrow on the right of the selector, to select medical items of a specific type.

- **Package**

Type in the beginning of; or the full **Package**; to search for medical items with a **Package**, which starts with or matches completely, the typed text.

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.23).

- **Search button**

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

### 2. Result Panel

CODE	NAME	TYPE	PACKAGE	PRICE	VALID FROM	VALID TO
00001	Paracetamol	Drug	0	1,200.00	11/08/2012	
00001	Test	Drug	Box	1,200.00	11/08/2012	11/08/2012
00002	Test	Medical-Prostheses	Box	1,250.00	15/08/2012	15/08/2012
00002	Test	Medical-Prostheses	Box	1,250.00	13/08/2012	15/08/2012
-1	-1	Drug	-1	1.00	14/08/2012	14/08/2012
-1	-1	Drug	-1	1.00	14/08/2012	14/08/2012
-1	-1	Drug	-1	1.00	15/08/2012	15/08/2012
-1	-1	Drug	-1	1.00	15/08/2012	15/08/2012

Img. 1.3.23: *Historical records - Result Panel*

The result panel displays a list of all medical items found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.24). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

CODE	NAME	TYPE	PACKAGE	PRICE	VALID FROM	VALID TO
00001	Paracetamol	Drug	0	1,200.00	11/08/2012	
M1	Acetofenac 50mg	Drug	Tablets	800.00	15/08/2012	
M11	Adrenaline(Epinephrine) 1mg in iml	Drug	Vial	800.00	15/08/2012	
M12	Adrenaline Solution 1:100	Drug	Bottle	500.00	15/08/2012	
M15	Albendazole 400mg	Drug	Tablets	500.00	15/08/2012	
M2	Acetazolamide 250 mg	Drug	Tablets	1,000.00	15/08/2012	
M21	Amethocaine Eye Drops 0.01	Drug	Bottle	5,000.00	15/08/2012	

Img. 1.3.24: *Selected record (blue), hovered records (yellow) - Result Panel*

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.25)

First Page	...	11	12	13	14	15	16	17	18	19	20	...	Last Page
------------	-----	----	----	----	----	----	----	----	----	----	----	-----	-----------

Img. 1.3.25: *Page selector- Result Panel*

### 3. Button Panel

With exception of the **Cancel** button, which re-directs to the [Home Page](#), the button panel (the buttons **Edit** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a medical item has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Medical Item Page

### 1. Data Entry

- Code

Enter the code for the medical item. Mandatory, 6 characters.

- Name

Enter the name of the medical item. Mandatory, 100 characters maximum.

- Type

Choose one from the options available, the type of the medical item. Mandatory.



Medical Item Details

Code

Name

Type ☐ Drug ☐ Medical Prostheses

Package

Price

Care Type ☐ Out-Patient ☐ In-Patient ☐ Both

Frequency

Patient ☒ Man ☒ Woman ☒ Adult ☒ Child

Save Cancel

Img. 1.3.26: *Medical Item Page*

- **Package**

Enter the package (Indication of type and volume of package in a suitable coding system) for the medical item. Mandatory, 255 characters maximum.

- **Price**

Enter the price (a general price that can be overloaded in pricelists). Full general price including potential cost sharing of an insuree) for the medical item. Mandatory.

- **Care Type**

Choose one from the options available, the limitation of provision of the medical item within the specific type of health care (In-patient, Out-patient or Both). Mandatory.

- **Frequency**

Enter the limitation of frequency of provision in a number of days within which a medical item cannot be provided to a patient not more than once. If the frequency is zero, there is no limitation. *Note: By default the frequency is 0.*

- **Patient**

Choose one or a combination of the options available, to specify which patient type the medical item may be provided to. *Note: By default all patients' options are checked (selected).*

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Medical Items Control Page*, with the newly saved record displayed and selected in the Result Panel. A message confirming that the medical item has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Medical Items Control Page*.

## Adding a Medical Item

Click on the **Add** button to re-direct to the *Medical Item Page*.

When the page opens all entry fields are empty. See the *Medical Item Page* for information on the data entry and mandatory fields.

## Editing a Medical Item

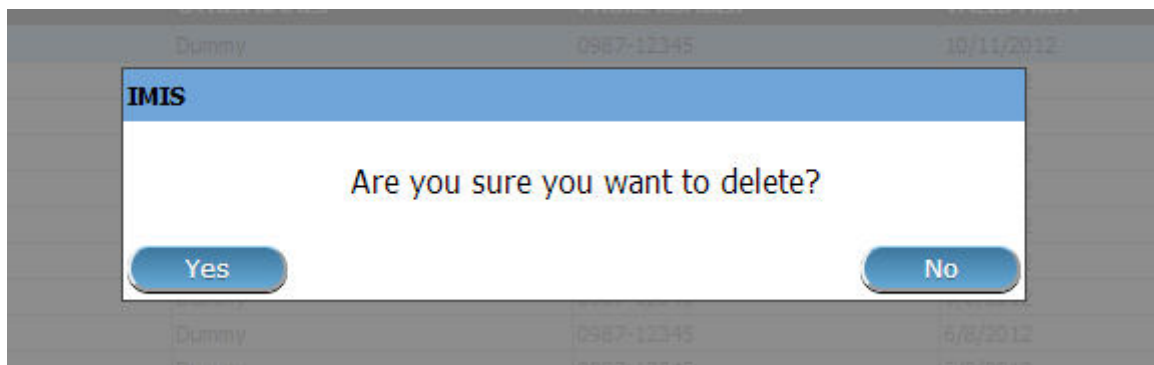
Click on the **Edit** button to re-direct to the *Medical Item Page*.

The page will open with the current information loaded into the data entry fields. See the *Medical Item Page* for information on the data entry and mandatory fields.

## Deleting a Medical Item

Click on the **Delete** button to delete the currently selected record

Before deleting a confirmation popup (Img. 1.3.27) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.3.27: Delete confirmation- Button Panel

When the medical item is deleted, all records retaining to the deleted medical item will still be available by selecting historical records.

## 1.3.5 Medical Service Price Lists Administration

Price lists of medical services are tools for specification which medical services and at which prices can be invoiced by contractual health facilities to the scheme administration. Administration of price lists of medical services is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Pricelists-Medical Services.

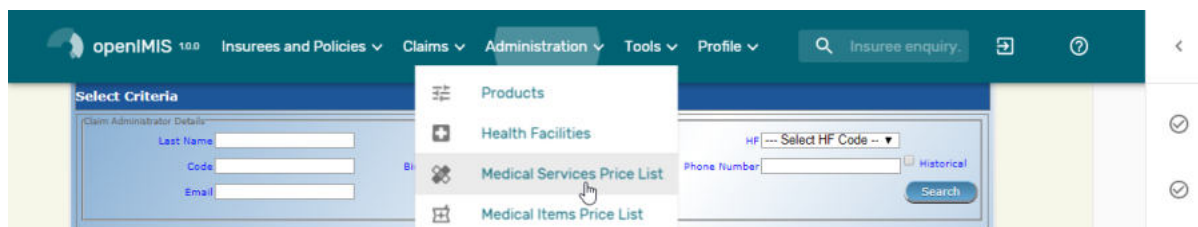
### Pre-conditions

A price list of medical services may only be added, after an agreement with a health facility or a group of health facilities on specific prices. Editing of the price list may occur only after an approval of the management of the scheme administration. Deletion of a price list of medical services normally will occur when a price list becomes obsolete.

### Navigation

All functionality for use with the administration of price lists medical services can be found under the main menu **Administration**, sub menu **Price Lists** and sub menu **Medical Services**

Clicking on the sub menu **Medical Services** re-directs the current user to the *Price List Medical Services Control Panel*.



Img. 1.3.28: Navigation Medical Services Price Lists

**Select Criteria**

Price Lists (Medical Services)

**A** Name  Date  Region  District  ☐ Historical

**5 Pricelists Found**

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
<a href="#">Health centre service pricelist</a>	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
<a href="#">Hospital service pricelist</a>	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
<a href="#">National price list</a>	01/01/2016	National		29/05/2017	
<a href="#">Regional pricelist</a>	01/01/2016	TestRegion		29/05/2017	
<a href="#">Test pricelist</a>	10/05/2017	TestRegion	TestDistrict2	10/05/2017	

**B**

**C**

**D**

Img. 1.3.29: Price List Medical Service Control Panel

## Price List Medical Services Control Page

The **Price List Medical Services Control Page** is the central point for administration of all price lists of medical service. By having access to this panel, it is possible to add, edit, delete and search. The panel is divided into four panels (Img. 1.3.28)

### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of price lists for medical services the following search options are available which can be used alone or in combination with each other.

- **Name**

Type in the beginning of; or the full **Name**; to search for price lists medical services with a **Name**, which starts with or matches completely, the typed text.

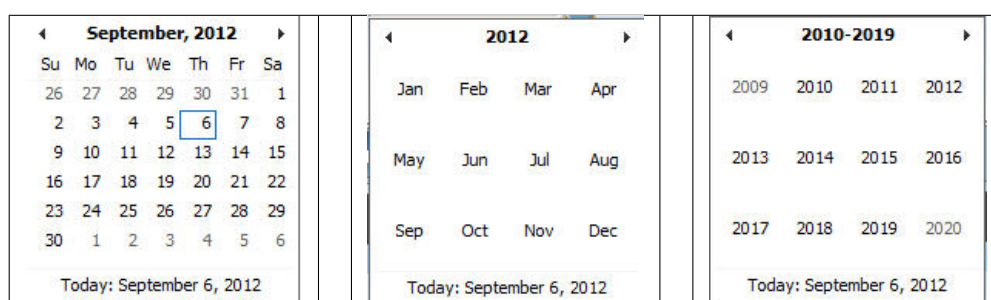
- **Date**

Type in the full **Date** to search for price lists of medical services with a creation **Date** which matches completely, the typed date. *Note: You can also use the button next to the date field to select a date.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Tab. 1); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- Anytime during the use of the pop-up, the user can see the date of today.
- Clicking on today will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



*Calendar Selector - Search Panel*

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select price lists of medical services from a specific region. The option **National** means that the price list is common for all regions. *Note: The list will only be filled with the regions assigned to the current logged in user and with the option National. All nationwide pricelists and all regional pricelists relating to the selected region will be found. If no district is selected then also all district pricelists*



for districts belonging to the selected region and assigned to the currently logged in user will be found.

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select price lists of medical services from a specific district. *Note: The list will be only filled with the districts belonging to the selected region. All nationwide pricelists, all regional pricelists relating to the selected region and all district pricelists for the selected district will be found.*

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.30)

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
<del>Health centre</del>	<del>10/05/2017</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>10/05/2017</del>	<del>10/05/2017</del>
Health centre service pricelist	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
<del>Hospital pricelist</del>	<del>01/01/2017</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>09/05/2017</del>	<del>10/05/2017</del>
<del>Hospital service pricelist</del>	<del>01/01/2017</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>10/05/2017</del>	<del>10/05/2017</del>
Hospital service pricelist	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
National price list	01/01/2016	National		29/05/2017	
Regional pricelist	01/01/2016	TestRegion		29/05/2017	
Test pricelist	10/05/2017	TestRegion	TestDistrict2	10/05/2017	

Img. 1.3.30: Historical records - Result Panel

- **Search button**

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The Result Panel displays a list of all price lists of medical services found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.31). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
Health centre service pricelist	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
Hospital service pricelist	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
National price list	01/01/2016	National		29/05/2017	
Regional pricelist	01/01/2016	TestRegion		29/05/2017	
Test pricelist	10/05/2017	TestRegion	TestDistrict2	10/05/2017	

Img. 1.3.31: Selected record (blue), hovered records (yellow) - Result Panel

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.32)

First Page	...	11	12	13	14	15	16	17	18	19	20	...	Last Page
------------	-----	----	----	----	----	----	----	----	----	----	----	-----	-----------

Img. 1.3.32: Page selector- Result Panel

## 3. Button Panel

With exception of the **Cancel** button, which re-directs to the *Home Page*, the Button Panel (the buttons **Edit** and **Duplicate**) is used in conjunction with the current selected



record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

#### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a price list of medical services has been added, updated or deleted or if there was an error at any time during the process of these actions.

### Price List Medical Services Page

#### 1. Data Entry

Price Lists (Medical Services)

☐ Check All

Name: Health centre service price

Date: 10/05/2017

Region: TestRegion

District: TestDistrict1

CODE	NAME	TYPE	PRICE	OVERRULE
<input checked="" type="checkbox"/> X106	Urinary lab test	Curative	200.00	
<input checked="" type="checkbox"/> X108	Antenatal examination	Preventive	100.00	
<input checked="" type="checkbox"/> X109	GP visit	Curative	100.00	
<input type="checkbox"/> X100	Burst Abdomen	Curative	1,000.00	
<input type="checkbox"/> X101	Cholecystectomy	Curative	2,000.00	
<input type="checkbox"/> X102	Caesarean Section Delivery	Curative	500.00	
<input type="checkbox"/> X103	Delivery-Normal	Curative	300.00	
<input type="checkbox"/> X105	Mastectomy	Curative	2,000.00	
<input type="checkbox"/> X107	Tubectomy	Curative	300.00	

Save Cancel

Img. 1.3.33: Price List Medical Service Page

- Name

Enter the name for the price list of medical services. Mandatory, 100 characters maximum.

- Date

Enter the creation date for the price list of medical services. *Note: You can also use the button next to the date field to select a date to be entered.*

- Region

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to enter the region in which the price list of medical services is to be used. The region **National** means that the price list is common for all regions. *The list will only be filled with the regions assigned to the current logged in user and with the option National.* Mandatory.

- District

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to enter the district in which the price list of medical services is to be used. *Note: The list will be only filled with the districts belonging to the selected region and currently logged in user.* It is not mandatory to enter a district, not selecting a district will mean the price list of medical services is used in all districts of the region or nationwide if the region National is selected.

- Medical Services

Select from the list of available medical services the medical services which the price list of medical service should contain, by either clicking on the **check all** box at the

top of the list of medical services, or by selectively clicking on the **check box** to the left of a medical service. The list shows the medical services displaying the code, name, type and price for reference. There is also an extra column, **Override**, which can be used to override the pre-set price. By clicking once on the row desired item in the override column, a new price can be entered for the individual service. This occurs when price agreed between a health facility or group of health facilities and the health insurance administration differs from the common price in the register of medical services.

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Price List Medical Services Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the price list medical service has been saved will appear on the Information Panel.

## 3. Mandatory Data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Price List Medical Services Control Page*.

## Adding a Price List of Medical Services

Click on the **Add** button to re-direct to the *Price List Medical Services Page*.

When the page opens all entry fields are empty. See the *Price List Medical Services Page* for information on the data entry and mandatory fields.

## Editing a Price List of Medical Services

Click on the **Edit** button to re-direct to the *Price List Medical Services Page*.

The page will open with the current information loaded into the data entry fields. See the *Price List Medical Services Page* for information on the data entry and mandatory fields.

## Duplicating a Price List of Medical Services

Click on the **Duplicate** button to re-direct to the *Price List Medical Services Page*.

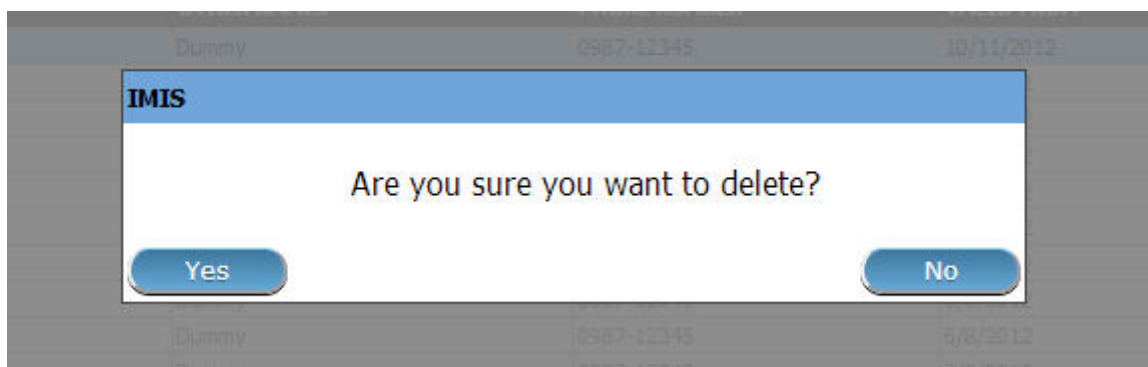
The page will open with all the current information for the selected pricelist, (except for the pricelist name which should be unique), loaded into the data entry fields. See the *Price List Medical Services Page* for information on the data entry and mandatory fields. To save the record, enter a unique code before clicking on save.

## Deleting a Price List of Medical Services

Click on the **Delete** button to delete the currently selected record.

Before deleting a confirmation popup () is displayed, which requires the user to confirm if the action should really be carried out?

When a price list medical service is deleted, all records retaining to the deleted price list medical service will still be available by selecting historical records.



Img. 1.3.34: Delete Confirmation - Button Panel

### 1.3.6 Medical Item Price Lists Administration

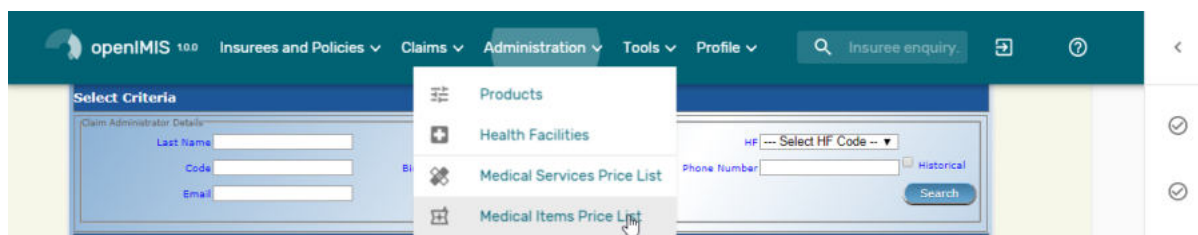
Pricelists of medical items are tools for specification which medical items and at which prices can be invoiced by contractual health facilities to the scheme administration. Administration of pricelists of medical items is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Pricelists-Medical Items.

#### Pre-conditions

A price list of medical items may only be added, after an agreement with a health facility or a group of health facilities on specific prices. Editing of the price list may occur only after an approval of the management of the scheme administration. Deletion of a price list of medical items normally will occur when a price list becomes obsolete.

#### Navigation

All functionality for use with the administration of medical items price lists can be found under the main menu **Administration**, sub menu **Price Lists**, sub menu **Medical Items**.



Img. 1.3.35: Navigation Price Lists Medical Items

Clicking on the sub menu **Medical Items** re-directs the current user to the *Price List Medical Items Control Page*.

#### Price List Medical Items Control Page

The **Price List Medical Items Control Page** is the central point for all medical item price list administration. By having access to this panel, it is possible to add, edit, delete and search. The panel is divided into four panels (Img. 1.3.38).

##### 1. Search Panel

**Select Criteria**

Price Lists (Medical Items)

**A** Name  Date  Region --Select Region-- District  ☐ Historical

**3 Pricelists Found**

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
<a href="#">Hospital items pricelist</a>	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
<a href="#">Health centre items pricelist</a>	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
<a href="#">Test pricelist items</a>	10/05/2017	TestRegion	TestDistrict2	10/05/2017	

**B**

**C**

**D**

Img. 1.3.36: Price List Medical Items Control Page

The search panel allows a user to select specific criteria to minimise the search results. In the case of price lists for medical items the following search options are available which can be used alone or in combination with each other.

- **Name**

Type in the beginning of; or the full **Name**; to search for price lists medical items with a Name, which starts with or matches completely, the typed text.

- **Date**

Type in the full **Date** to search for price lists of medical items with a creation Date which matches completely, the typed date. *Note: You can also use the button next to the date field to select a date.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Img. 1.3.36); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of today.
- Clicking on today will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



Calendar Selector - Search Panel

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select price lists of medical items from a specific region. The option **National** means that the price list is common for all regions. *Note: The list will only be filled with the regions assigned to the current logged in user and with the option National. All nationwide pricelists and all regional pricelists relating to the selected region will be found. If no district is selected the also all district pricelists for districts belonging to the selected region will be found.*

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select price lists medical items from a specific district. *Note: The list will be only filled with the districts belonging to the selected region and assigned to the currently logged in user. All nationwide pricelists, all regional pricelists relating to the selected region and all district pricelists for the selected district will be found.*

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.37).

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
Hospital items pricelist	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
<del>Hospital pricelist</del>	<del>01/01/2017</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>09/05/2017</del>	<del>10/05/2017</del>
Health centre items pricelist	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
Test pricelist items	10/05/2017	TestRegion	TestDistrict2	10/05/2017	

Img. 1.3.37: Historical records - Result Panel

- **Search button**

Once the criteria have been entered, use the search button to filter the records, the results will appear in the result panel.

## 2. Result Panel

The Result Panel displays a list of all price lists of medical items found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.38). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.39)

## 3. Button Panel

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
Hospital items pricelist	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
Health centre items pricelist	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
Test pricelist items	10/05/2017	TestRegion	TestDistrict2	10/05/2017	

Img. 1.3.38: Selected record (blue), hovered records (yellow) - Result Panel

First Page	...	11	12	13	14	15	16	17	18	19	20	...	Last Page
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Img. 1.3.39: Page selector- Result Panel

With exception of the **Cancel** button, which re-directs to the [Home Page](#), the button panel (the buttons **Edit** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

#### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a price list medical item has been added, updated or deleted or if there was an error at any time during the process of these actions.

### Price List Medical Item Page

#### 1. Data entry

Img. 1.3.40: Price List Medical Item Page

- **Name**

Enter the name for the price list of medical items. Mandatory, 100 characters maximum.

- **Date**

Enter the creation date for the price list of medical items. *Note: You can also use the button next to the date field to select a date to be entered.*

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to enter the region in which the price list of medical items is to be used. The district **National** means that the price list is common for all regions. *Note: The list will only be filled with the regions assigned to the current logged in user and with the option National.* Mandatory.

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to enter the district in which the price list of medical items is to be used. *Note: The list will be only filled with the districts belonging to the selected region and currently logged in user.* It is not mandatory to enter a district, not selecting a district will mean the price list of medical items is used in all districts of the region or nationwide if the region National is selected .

- **Medical Items**

Select from the list of available medical items the medical items which the price list medical item contains, by either clicking on the **check all box** at the top of the list of medical items, or by selectively clicking on the **check box** to the left of the medical item. The list shows the medical items displaying the code, name, type and price for reference. There is also an extra column, **Override**, which can be used to overrule the pre-set price. By clicking once on the row desired item in the override column, a new price can be entered for the individual item. This occurs when price agreed between a health facility or group of health facilities and the health insurance administration differs from the common price in the register of medical items.

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Price list Medical Items Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the price list of medical items has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save button**, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Price List Medical Items Control Page*.

## Adding a Price List of Medical Items

Click on the **Add** button to re-direct to the *Price List Medical Item Page*.

When the page opens all entry fields are empty. See the *Price List Medical Item Page* for information on the data entry and mandatory fields.

## Editing a Price List of Medical Items

Click on the **Edit** button to re-direct to the *Price List Medical Item Page*.

The page will open with the current information loaded into the data entry fields. See the *Price List Medical Item Page* for information on the data entry and mandatory fields.

## Duplicating a Price List of Medical Items

Click on the **Duplicate** button to re-direct to the *Price List Medical Item Page*.

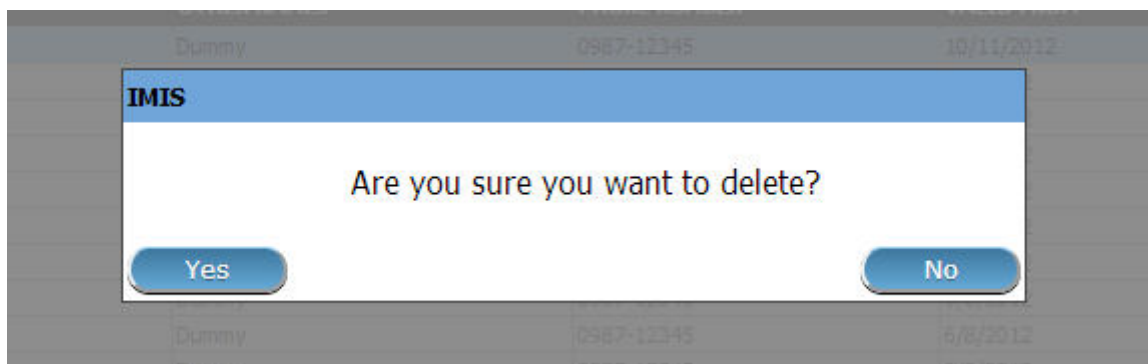
The page will open with all the current information for the selected price list, (except for the price list name which should be unique), loaded into the data entry fields. See the *Price List Medical Item Page* for information on the data entry and mandatory fields. To save the record, enter a unique code before clicking on **Save**.



## Deleting a Price List of Medical Items

Click on the **Delete** button to delete the currently selected record; the user is re-directed to the *Price List Medical Items Control Page*.

Before deleting a confirmation popup ([Img. 1.3.41](#)) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.3.41: Delete confirmation- Button Panel

When a price list of medical items is deleted, all records retaining to the deleted price list of medical items will still be available by selecting historical records.

## 1.3.7 Users administration

User administration is restricted to users with the system role of IMIS Administrator or with a role including an access to Administration/Users.

### Pre-conditions

A user may only be added or thereafter edited, after the approval of the management of the scheme administration. Deletion of a user normally will occur when a user leaves his/her post within the health insurance scheme and/or the scheme administration. A built in user with the user name Admin and the initial password Admin is created automatically in IMIS with access to all locations of the register of locations (at any time). The Admin user has an implicit role that includes full access rights to the registers of locations, full access to the register of user profiles and an access to downloading/uploading of the register of locations to/from an external file.

### Navigation

All functionality for use with the administration of users can be found under the main menu **Administration**, sub menu **Users**.

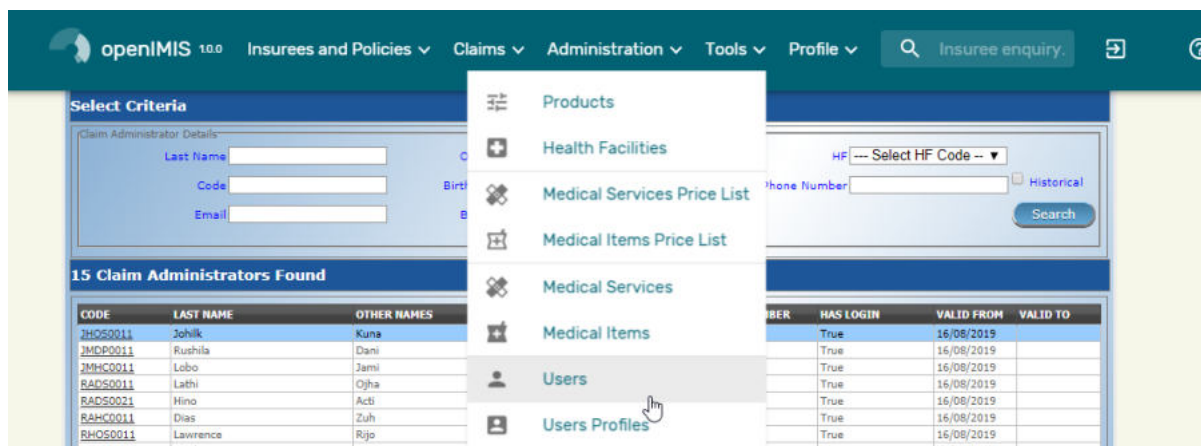
Clicking on the sub menu **Users** re-directs the current user to the *User Control Page*.

### User Control Page

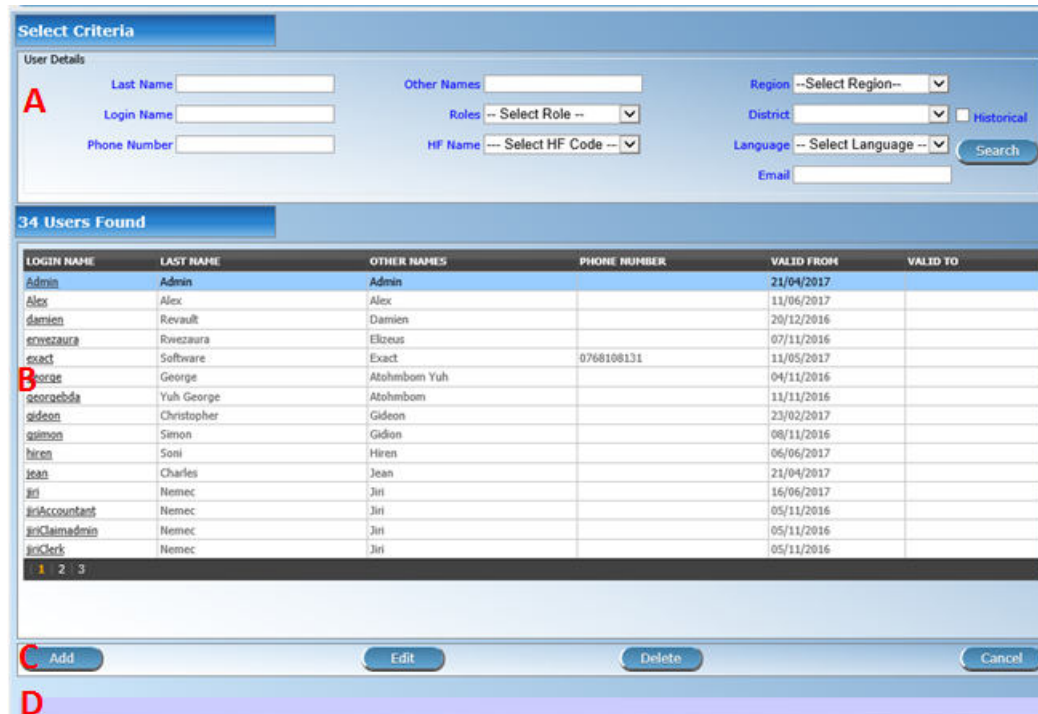
The **User Control Page** is the central point for all user administration. By having access to this page, it is possible to add, edit, delete and search users. The page is divided into four panels ([Img. 1.3.42](#)).

The following rules apply to the list of found users besides conformance with all search criteria:





Img. 1.3.42: *Navigation Users*



Img. 1.3.43: *User Control Page*

1. The user Admin is not included in any searching for users with exception of searching done by an Admin user itself.
2. A user having access rights Users/Search (see User Profiles) can get as a result of a searching only users that have access to same set of locations or to a subset of locations of the searching user only.

## 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of users the following search options are available which can be used alone or in combination with each other.

- **Last Name**

Type in the beginning of; or the full Last name; to search for users with a Last name, which starts with or matches completely, the typed text.

- **Login Name**

Type in the beginning of; or the full Login name, to search for users with a Login name, which starts with or matches completely, the typed text.

- **Phone Number**

Type in the beginning of; or the full Phone Number, to search for users, with a Phone Number which starts with or matches completely, the typed text.

- **Email**

Type in the beginning of; or the full Email, to search for users, with an Email which starts with or matches completely, the typed text.

- **Other Names**

Type in the beginning of; or the full Other Names, to search for users, with Other names which start with or match completely the typed text.

- **Role**

Select the Role; from the list of roles by clicking on the arrow on the right of the selector, to select users of a specific role.

- **Health Facilities**

Select the Health Facility; from the list of health facilities by clicking on the arrow on the right of the selector, to select users from a specific health facility. *Note: The list will only be filled with the health facilities belonging to the districts assigned to the currently logged in user.*

- **Region**

Select the Region; from the list of regions by clicking on the arrow on the right of the selector to find users with access to a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user.*

- **District**

Select the District; from the list of districts by clicking on the arrow on the right of the selector to find users with access to a specific district. *The list will be only filled with the districts belonging to the selected region.*

- **Language**

Select the Language; from the list of languages by clicking on the arrow on the right of the selector, to select users with a specific language.

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.44).

LOGIN NAME	LAST NAME	OTHER NAMES	PHONE NUMBER	VALID FROM	VALID TO
Admin	Admin	Admin	123456789	16/08/2012	
<del>Admin</del>	<del>Admin</del>	<del>Admin</del>	<del>1234567890</del>	<del>10/08/2012</del>	<del>10/08/2012</del>
<del>Admin</del>	<del>Admin</del>	<del>Admin</del>	<del>-</del>	<del>10/08/2012</del>	<del>10/08/2012</del>
<del>Admin</del>	<del>Admin</del>	<del>Admin</del>	<del>123456789</del>	<del>10/08/2012</del>	<del>13/08/2012</del>
<del>Admin</del>	<del>Admin</del>	<del>Admin</del>	<del>123456789</del>	<del>13/08/2012</del>	<del>13/08/2012</del>
<del>Admin</del>	<del>Admin</del>	<del>Admin</del>	<del>123456789</del>	<del>13/08/2012</del>	<del>15/08/2012</del>

Img. 1.3.44: *Historical records - Result Panel*

- Search Button

Once the criteria have been entered, use the search button to filter the records, the results will appear in the result panel.

## 2. Result Panel

LOGIN NAME	LAST NAME	OTHER NAMES	PHONE NUMBER	VALID FROM	VALID TO
Admin	Admin	Admin		22/11/2016	
ernestcaira	Rwecaura	Erzeus		07/11/2016	
exact	Exact	Exact		08/12/2016	
george	George	Atohmson Yuh		04/11/2016	
georgechdz	Yuh George	Atohmson		11/11/2016	
gideon	Christopher	Gideon		11/11/2016	
isaiah	Isaiah	Isaiah		08/11/2016	

Img. 1.3.45: *Selected record (blue), hovered records (yellow) - Result Panel*

The result panel displays a list of all users found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.45). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.46)

First Page	...	11	12	13	14	15	16	17	18	19	20	...	Last Page
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Img. 1.3.46: *Page selector- Result Panel*

## 3. Button Panel

With exception of the **Cancel** button, which re-directs to the *Home Page*, the button panel (the buttons **Edit** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

## 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a user has been added, updated or deleted or if there was an error at any time during the process of these actions.

## User Page

### 1. Data Entry

- Language

The screenshot shows the 'User Details' form. On the left, there are input fields for 'Language' (a dropdown), 'Other Names', 'Last Name', 'Phone Number', 'Email', 'Login Name', 'Password', 'Confirm Password', and 'HF Name' (a dropdown). To the right of these fields are three lookup tables, each with a 'Check All' checkbox. The first table is 'Role' and lists: Enrolment Officer, Manager, Accountant, Clerk, Medical Officer, Scheme Administrator, IMIS Administrator, Receptionist, Claim Administrator, and Claim Contributor. The second table is 'Region' and lists: Region, North West, South West, and Central. The third table is 'District' and lists: Dummy, Kongwa, Bahi, Dodoma, Basel, Kilosa, Mpapwa, Kailali, Msalala, Bamenda, Bambui, Kumbo, Buea, Mamfe, and Morogoro. At the bottom of the form are 'Save' and 'Cancel' buttons.

Img. 1.3.47: User Page

Select the user's preferred language from the list by clicking on the arrow on the right hand side of the lookup. Mandatory.

- **Last name**

Enter the last name (surname) for the user. Mandatory, 100 characters maximum.

- **Other Names**

Enter other names of the user. Mandatory, 100 characters maximum.

- **Phone Number**

Enter the phone number for the user. 50 characters maximum.

- **Email**

Enter the e-mail address for the user. 50 characters maximum.

- **Login Name**

Enter the Login name for the user. This is an alias used for logging into the application; a minimum of 6 and a maximum of 25 characters should be used for the login. Each Login Name should be unique. Mandatory.

- **Password**

Enter the password for the user. This is used at login to grant access to the application; a minimum of 8 and a maximum of 25 characters should be used for the password. The password should have at least one digit. Mandatory.

- **Confirm Password**

Re-enter the password. The password must be entered twice, to ensure that there was no mistyping in the first entry. Mandatory.

- **Health Facility**

Select the health facility that the user belongs to, if applicable, from the list of health Facilities from the list by clicking on the arrow on the right hand side of the lookup. *Note: The list will only be filled with the Health Facilities belonging to the districts assigned to the currently logged in user.*

- **Roles**

Select from the list of available roles the Roles which the user carries out, by either clicking on the **Check All** box at the top of the list of Roles, or by selectively clicking on the **Check box** to the left of the role. Mandatory (at least one role must be selected). The list of roles contains all roles (user profiles) that are not blocked. Mandatory (at least one role must be selected)

- **Regions**

Select from the list of available regions the region(s) which the user will have access to, by either clicking on the **Check All** box at the top of the list of regions, or by selectively clicking on the **Check box** to the left of a region. Mandatory (at least one region must be selected). The selection can be done indirectly by selecting a district or some districts. The box contains only regions accessible to the user or regions that have been added by the user. Mandatory (at least one region must be selected). The selection can be done indirectly by selecting a district or some districts.

- **Districts**

Select from the list of available districts the district(s) which the user will have access to, by either clicking on the **Check All** box at the top of the list of districts, or by selectively clicking on the **Check box** to the left of the district. Districts are pre-selected based on the selected region(s). The pre-selection can be modified. Mandatory (at least one district must be selected). The selection can be done indirectly by just selecting a region or some regions. The box contains only regions accessible to the user or regions that have been added by the user. Mandatory (at least one region must be selected). The selection can be done indirectly by selecting a district or some districts.

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *User Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the user has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data fields will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *User Control Page*.

## Adding a User

Click on the Add button to re-direct to the *User Page*.

When the page opens all entry fields are empty. See the *User Page* for information on the data entry and mandatory fields.

## Editing a User

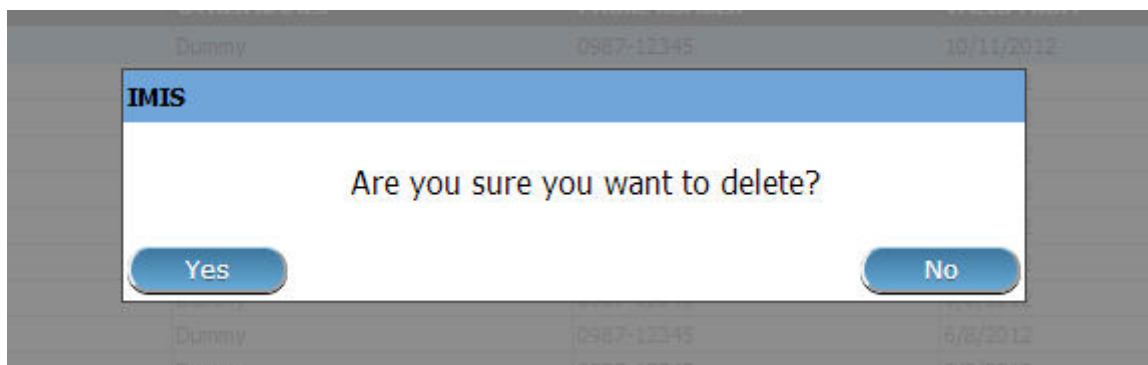
Click on the Edit button to re-direct to the *User Page*

The page will open with the current information loaded into the data entry fields. See the *User Page* for information on the data entry and mandatory fields

## Deleting a User

Click on the Delete button to delete the currently selected record

Before deleting a confirmation popup (Img. 1.3.48) is displayed, this requires the user to confirm if the action should really be carried out.



Img. 1.3.48: Delete confirmation- Button Panel

When a user is deleted, all records retaining to the deleted user will still be available by selecting historical records.

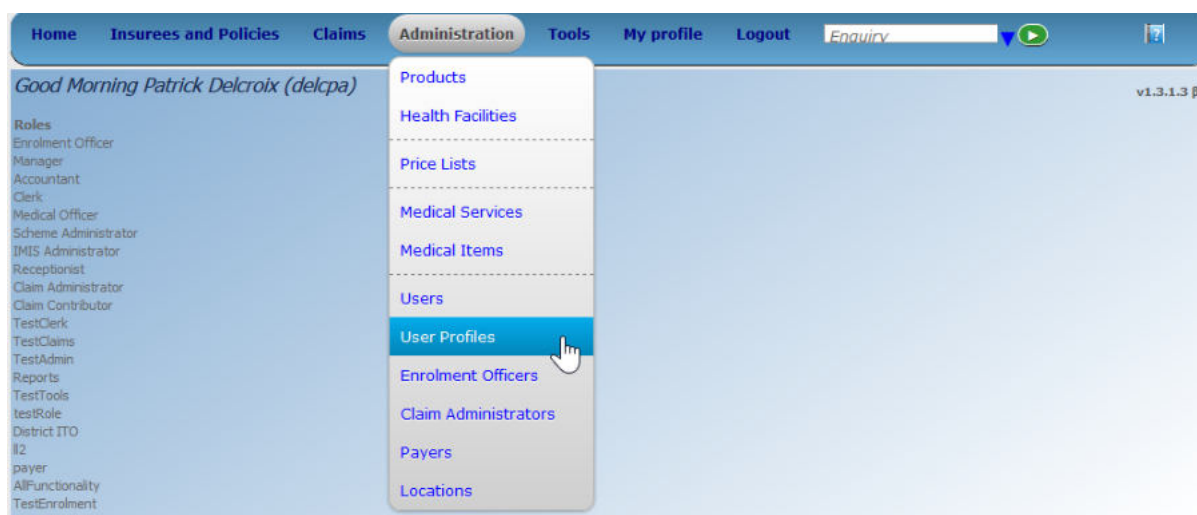
### 1.3.8 User roles/profiles administration

IMIS uses the concept of user profiles (roles) that can be associated with users. Some roles are predefined and they are designated as system roles. Their purpose is guarantee compatibility with the previous versions of IMIS.

User roles/profiles administration is restricted to users with the role of openIMIS Administrator.

#### Navigation

All functionality for use with the administration of user roles can be found under the main menu **Administration**, sub menu **Users Profile**.



Img. 1.3.49: Image - Navigation User Roles/profiles

Clicking on the sub menu **Users** re-directs the current user to the *User roles/profiles control page*.

The screenshot shows a web interface for managing user roles. At the top, there's a 'Select Criteria' section with a 'Role Details' box. Inside this box, there's a 'Role name' field with the value '%er', a 'System' dropdown menu, a 'Blocked' dropdown menu, and a 'Historical' checkbox. A 'Search' button is located to the right. Below this, a blue banner indicates '6 Roles Found'. Underneath is a table with the following data:

ROLE NAME	SYSTEM	BLOCKED	VALID FROM	VALID TO
Enrolment Officer	True	False	20/02/2019	
Manager	True	False	20/02/2019	
Clerk	True	False	20/02/2019	
Medical Officer	True	False	20/02/2019	
TestClerk	False	False	28/02/2019	
payer	False	False	28/02/2019	

At the bottom of the table, there are five buttons: 'Add', 'Edit', 'Duplicate', 'Delete', and 'Cancel'. Below these buttons is a purple bar.

Img. 1.3.50: Image - User roles/profile control page

## User roles/profiles control page

The **User roles/profile control page** is the central point for all user roles/profiles administration. By having access to this page, it is possible to add, edit, delete and search users roles/profiles. The page is divided into four panels (*Image User roles/profiles control page*).

Administration of users' profile s(roles) is not included in any system role. It can be accomplished by the Admin user or by users to which such administration is delegated (by defining a role including an access to Administration/User Profiles) by the Admin user.

### Pre-conditions

A new user profile may only be added or thereafter edited, after an approval of the management of the scheme administration. It can be accomplished at the beginning only by the Admin user. The Admin user can define a new user profile incorporating also adding, editing or deleting of user profiles and create new users with this profile. In this way, rights to the register of user profiles can be delegated to other users besides the Admin user.

### Navigation

All functionality for use with the administration of user profiles can be found under the main menu ADMINISTRATION, sub menu USER PROFILES

#### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. The following search options are available which can be used alone or in combination with each other.

- **Role Name**

When set the search will display the roles with a name that start with the content of the filter , % can be used as a wildcard meaning a search with %er will display all the result containing er in the name

- **System**

The system user profiles match the previous roles for compatibility reasons. When set to *TRUE* the search will display the default roles, when set to *FALSE* the search



will display only the custom roles

- **Blocked**

The blocked user profiles are temporarily not acting in the sense that their access rights are not available to users to whom blocked user profiles were assigned. When set to *TRUE* the search will display the roles that were blocked, when set to *FALSE* the search will display only the unblocked roles

- **Historical**

Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (*User roles results*).

## 2. Result Panel

The Result Panel displays a list of all roles/profiles found, matching the selected criteria in the Search Panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (*Image User roles results panel*). The leftmost record contains a hyperlink which if clicked, re-directs the user to the *Change user role/profile Page*. A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel

11 Roles Found				
ROLE NAME	SYSTEM	BLOCKED	VALID FROM	VALID TO
Enrolment Officer	True	False	20/02/2019	
Manager	True	False	20/02/2019	
Clerk	True	False	20/02/2019	
Medical Officer	True	False	20/02/2019	
TestClerk	False	False	28/02/2019	
<del>TestClerk</del>	<del>False</del>	<del>True</del>	<del>22/02/2019</del>	<del>22/02/2019</del>
<del>TestClerk</del>	<del>False</del>	<del>False</del>	<del>26/02/2019</del>	<del>26/02/2019</del>
<del>TestClerk</del>	<del>False</del>	<del>False</del>	<del>26/02/2019</del>	<del>26/02/2019</del>
payer	False	False	28/02/2019	
<del>TestClerk</del>	<del>False</del>	<del>False</del>	<del>22/02/2019</del>	<del>28/02/2019</del>
<del>TestClerk</del>	<del>False</del>	<del>True</del>	<del>28/02/2019</del>	<del>28/02/2019</del>

Img. 1.3.51: *User roles results panel*

- Blue background: Selected record
- Yellow background: hovered records
- Strikethrough: historical records

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (*Image User roles/profile control page*)

## 3. Button Panel

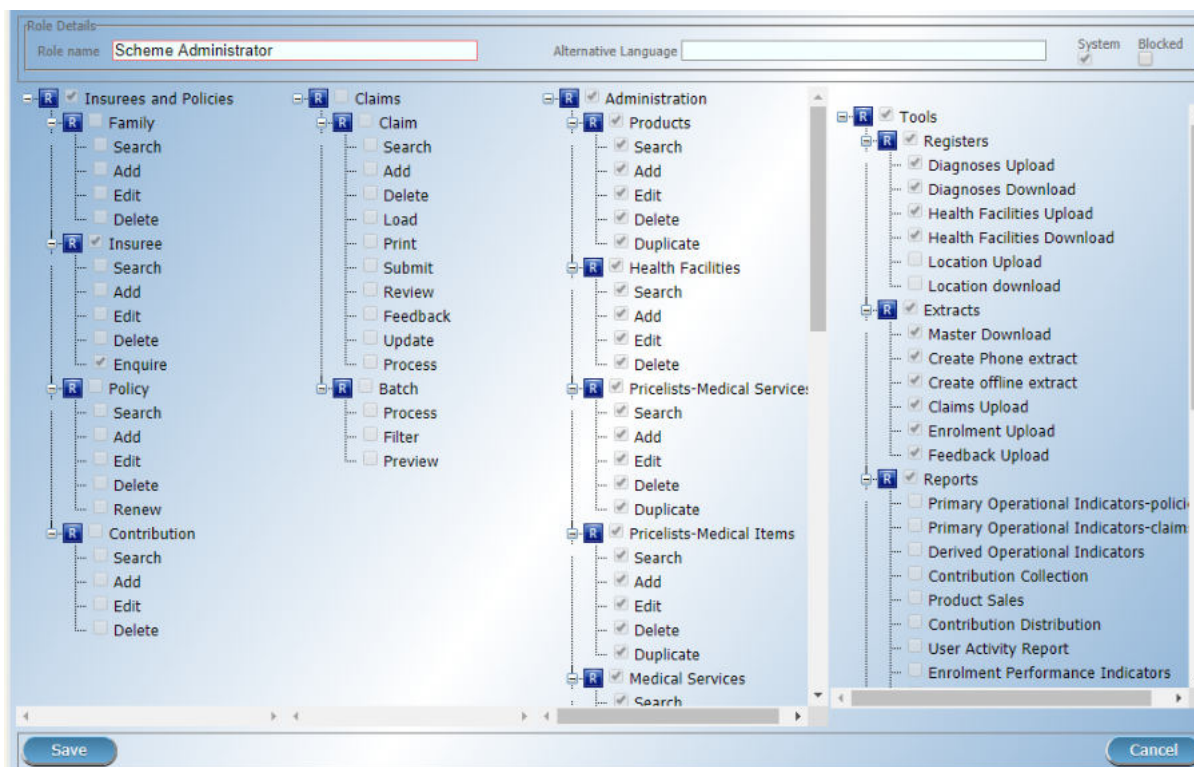
- The Add button will *add a new role/profile* (not available if **Historical** was checked)
- The Edit button will *edit a role/profile*. not available if **Historical** was checked)
- The Duplicate button will *duplicate a role/profile* (not available if **Historical** was checked)
- The Delete button will *deleting a role/profile* (not available if **Historical** was checked)
- The Cancel button re-directs to the *Home Page*.



#### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a user role/profile has been added, updated or deleted or if there was an error at any time during the process of these actions.

#### User role/profile Page



Img. 1.3.52: Image - User role/profile page

#### 1. Data Entry - Role details

- Role Name

Enter the name of the role/profile, this name will be used as reference in the *User roles/profiles control page* and *Users page*

- Alternative language

Translation of the role name for the second language of openIMIS

- System

Read-only checkbox indicating whether the user profile is a system one or not.

- Blocked

If checked the user profile is blocked

#### 2. Data Entry - Rights details

- Insurees and Policies

list of the right available for the *Insurees and Policies* module:

- CRUD rights (Create, read/search, update/edit and Delete):
  - \* Family/Group

- \* Insuree
- \* Policy
- \* Contribution
- Business specific roles
  - \* Renew policy
  - \* Enquire insuree

- **Claims**

list of the right available for the *Claims* module:

- CRUD rights (Create, read/search, update/edit and Delete):
  - \* Claims
- Business specific roles:
  - \* Claims:
    - Print
    - Submit
    - Review
    - Feedback
    - Update
    - Process
  - \* Claim Batch:
    - Process
    - Filter
    - Preview

- **Administration**

list of the right available for the *Administration* module:

- CRUD rights (Create, read/search, update/edit and Delete):
  - \* Products
  - \* Health Facilities
  - \* Pricelists – Medical Services
  - \* Pricelists – Medical Items
  - \* Medical Services
  - \* Medical Items
  - \* Enrolment Officers
  - \* Claim Administrators
  - \* Users
  - \* User roles/profiles
  - \* Payers
  - \* Locations
- Business specific roles
  - \* Duplicate Products

- \* Duplicate Pricelists – Medical Services
- \* Duplicate Pricelists – Medical Items
- \* Duplicate User roles/profiles
- \* Move Locations

- **Tools**

list of the business rights available for the *Tools* module

- Register
  - \* Upload Diagnoses
  - \* Upload Health Facilities
  - \* Upload Locations
  - \* Download Diagnoses
  - \* Download Health Facilities
  - \* Download Locations
- Extracts
  - \* Download Mater-data
  - \* Create Phone Extracts
  - \* Create Offline Extract
  - \* Upload Claims
  - \* Upload Enrolments
  - \* Upload Feedback
- Run report
  - \* Primary Operational Indicators-policies
  - \* Primary Operational Indicators-claims
  - \* Derived Operational Indicators
  - \* Contribution Collection
  - \* Product Sales
  - \* Contribution Distribution
  - \* User Activity Report
  - \* Enrolment Performance Indicators
  - \* Status of Registers
  - \* Insurees without Photos
  - \* Payment Category Overview
  - \* Matching Funds
  - \* Claim Overview
  - \* Percentage of Referrals
  - \* Families and insurees Overview
  - \* Pending Insurees
  - \* Renewals
  - \* Capitation Payment

- \* Rejected Photos
- Utilities/Email setting
  - \* Backup
  - \* Restore
  - \* Execute Script
  - \* Email Setting

### 3. Buttons

- **Save**

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *User Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the user has been saved will appear on the Information Panel.

- **Cancel**

By clicking on the **Cancel** button, the user will be re-directed to the *User roles/profiles control page*.

#### **Mandatory data**

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data fields will take the focus (by an asterisk on the right of the corresponding data field).

### **Adding a User role/profile**

Click on the Add button to re-direct to the *User role/profile Page*.

When the page opens all entry fields are empty. See the *User role/profile Page*. for information on the data entry and mandatory fields.

### **Editing a User role/profile**

Click on the Edit button to re-direct to the *User role/profile Page*.

The page will open with the current information loaded into the data entry fields. See the *User role/profile Page*. for information on the data entry and mandatory fields.

### **Duplicating a User role/profile**

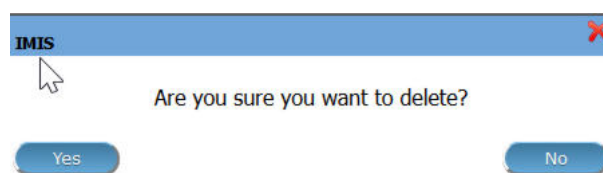
Click on the Duplicate button to re-direct to the *User role/profile Page*.

The page will open with all the current rights for the selected user role/profile, (except for the user role/profile name which should be unique), loaded into the data entry fields. See the *User role/profile Page* for information on the data entry and mandatory fields. To save the record, enter a unique code before clicking on **Save**.

### **Deleting a User role/profile**

Click on the Delete button to delete the currently selected record.

Before deleting a confirmation popup (*Image User roles/profile delete confirmation*) is displayed, this requires the user to confirm if the action should really be carried out.



Img. 1.3.53: User roles/profile delete confirmation

When a user roles/profile is deleted, the rights that it provide are not available to the users having that role/profile.

### Default User roles and rights

The table below shows the default roles in openMIS.

Tab. 1.3.1: Overview of Scheme administrator & district Staff roles

Role	Responsibilities	Available functionality
Enrolment Officer	He/she enrolls insurees and submits enrolment forms to a health insurance administration; handles policy modifications; collects feedback from scheme patients and submits to the health insurance administration.	<ul style="list-style-type: none"> <li>* Capture a photo of an Insuree.</li> <li>* Send a photo</li> <li>* Inquiry on an Insuree</li> <li>* Collect feedback from an Insuree</li> </ul>
Village Executive Officer (VEO)	He/she collects feedbacks and collects changes on insurees during insurance periods	<ul style="list-style-type: none"> <li>* Collect feedback from an Insuree</li> <li>* Inquiry on an Insuree</li> </ul>
Manager	Oversees operations of the health insurance scheme; runs openMIS operational reports analyses data generated from the IMIS.	<ul style="list-style-type: none"> <li>* Create managerial statistics</li> <li>* Authorize issuance of a substitution</li> <li>* membership card</li> </ul>
Accountant	Transfers data on collected Contributions to an external accounting system. Calculates claim amounts per health facility, runs openMIS operational reports and presents claims decision overview to management of a health insurance administrator. Processes approved claims to health facility sub-accounts.	<ul style="list-style-type: none"> <li>* Transfer of data on Contributions to accounting system</li> <li>* Valuation of a claim</li> <li>* Transfer of a batch of claims for payment</li> </ul>

Continued on next page

Tab. 1.3.1 – continued from previous page

Role	Responsibilities	Available functionality
Clerk	Enters and modifies data on families, insurees, policies and contributions. Enters data on claims if the claims are submitted in a paper form.	<ul style="list-style-type: none"> <li>* <i>Creation/ Search/ Modification/ Deletion/ Modification of a household/group, an Insuree, a Policy or a Contribution.</i></li> <li>* <i>Renewal of a policy</i></li> <li>* <i>Entry of a claim</i></li> </ul>
Medical Officer	Provides technical advice on claims verification from a medical standpoint.	<ul style="list-style-type: none"> <li>* <i>Checking of a claim for plausibility</i></li> <li>* <i>Review of a claim</i></li> <li>* <i>Authorize a claim for payment</i></li> </ul>
Scheme Administrator	Administers registers (all except the register of users)	<ul style="list-style-type: none"> <li>* <i>Administer registers ( Officers, Payers, Health Facilities, , Medical Services, Medical Items, Medical Item Price Lists, Medical Services Price List, Products)</i></li> <li>* <i>Extract Creation for Off-line Health Facilities</i></li> </ul>
openIMIS Administrator	Administers operations of the IMIS. Is responsible for backups of data.	<ul style="list-style-type: none"> <li>* <i>Administer the register of users, Utilities</i></li> <li>* <i>Manage Backup, Restore and Updates</i></li> <li>* <i>Extract Creation for Off-line Health Facilities</i></li> </ul>

Tab. 1.3.2: Overview of Health Facilities staff roles

Role	Responsibilities	Available functionality
Receptionist	Verifies membership and issues to a patient a claim form.	* Inquiring on a Household/group, <i>Insuree</i> and <i>Policy</i>
Claim Administrator	Pools claim forms of a health facility, enters and submits claims.	* Opening of a batch of claims * Entry of a claim
HF Administrator	Off-line HealthFacility administration	* <i>Off-line extract upload</i>
Offline HF Administrator	Off-line HealthFacility administration	* Creation of clerk * Creation of offline Extract

### 1.3.9 Enrolment Officers Administration

Enrolment Officers administration is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Enrolment Officers.

#### Pre-conditions

An enrolment officer may only be added after the approval of the management of the scheme administration with engaging of a new enrolment officer. Editing may be done on all fields; however, approval of the management of the scheme administration is usually required for a substitution of an enrolment officer. Deletion will normally occur when an enrolment officer leaves his post within the scheme administration. Entry of an enrolment officer in the register of enrolment officers doesn't mean that the enrolment officer can login to IMIS. He/she has to be entered also in the register of users. It is facilitated by the ability to create the entry of an enrolment officer into the register of enrolment officers and the register of users simultaneously.

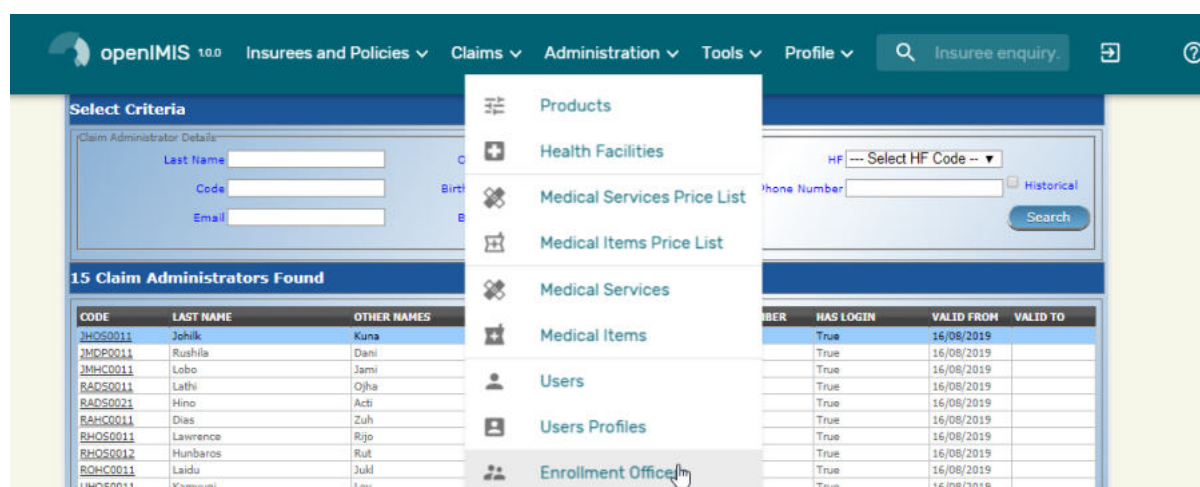
#### Navigation

All functionality for use with the administration of enrolment officers can be found under the main menu **Administration**, sub menu **Enrolment Officers**.

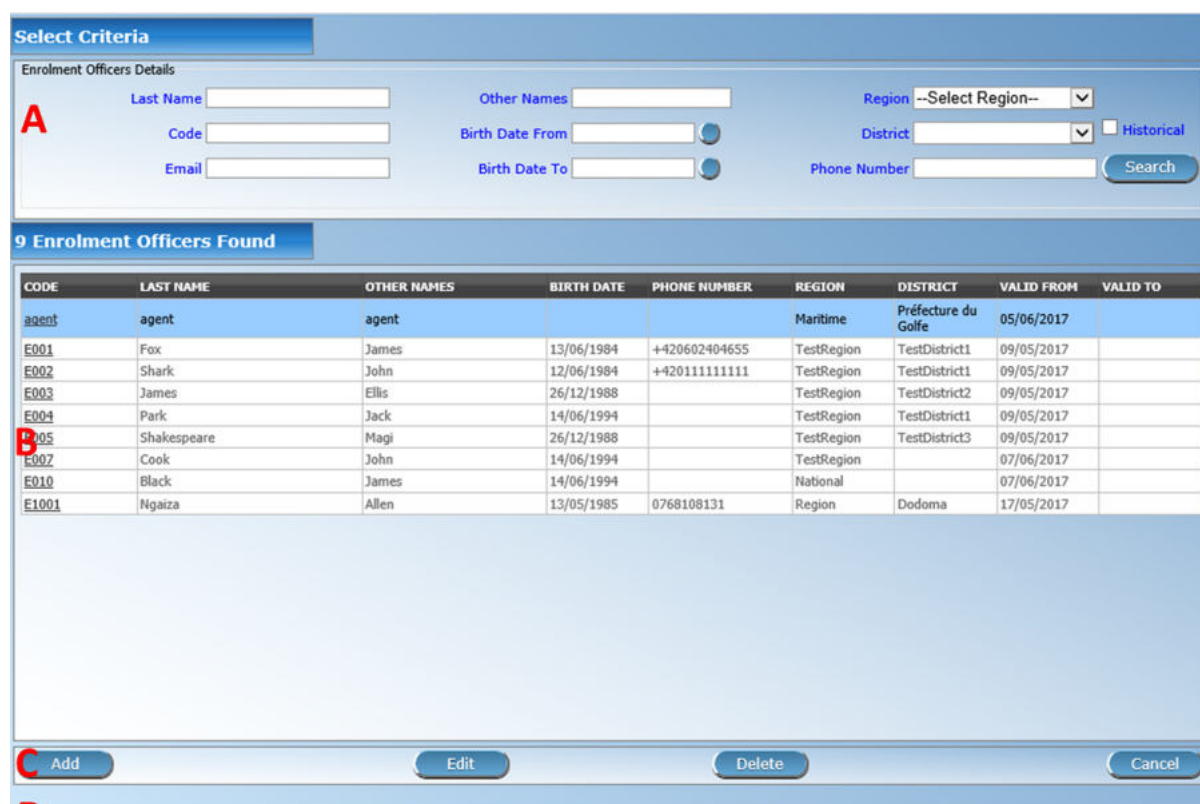
Clicking on the sub menu **Enrolment Officers** re-directs the current user to the *Enrolment Officers Control Page*..

#### Enrolment Officers Control Page

The Enrolment Officers Control Page is the central point for all Enrolment Officer administration. By having access to this page, it is possible to add, edit, delete and search. The page is divided into four panels ([Img. 1.3.55](#)).



Img. 1.3.54: Navigation Enrolment Officers



Img. 1.3.55: Enrolment Officers Control Page



## 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of officers the following search options are available which can be used alone or in combination with each other.

- **Last Name**

Type in the beginning of; or the full **Last name**; to search for officers with a **Last name**, that starts with or matches completely, the typed text.

- **Code**

Type in the beginning of; or the full **Code** to search for officers with a **Code**, that starts with or matches completely, the typed text.

- **Other Names**

Type in the beginning of; or the full **Other Names** to search for officers with **other names**, that starts with or matches completely, the typed text.

- **Birth Date From**

Type in a date; or use the Date Selector Button, to enter the **Birth Date From** to search for officers having the same or later birth date. *Note: To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

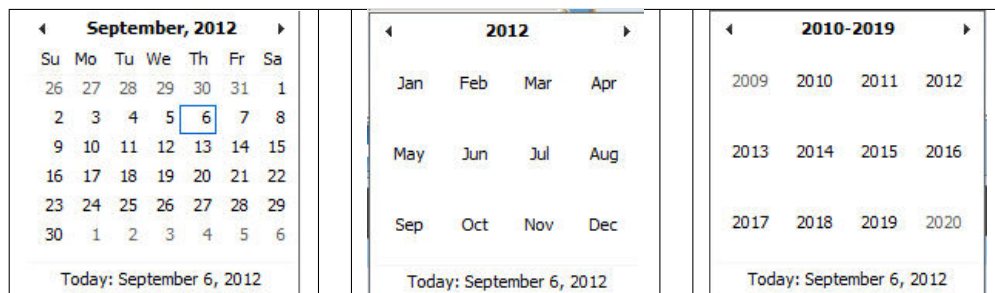
- **Birth Date To**

Type in a date; or use the Date Selector Button, to enter the **Birth Date To** to search for officers having the same or earlier birth date. *Note: To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date Selector button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Tab. 1); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of *today*.
- Clicking on *today* will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



*Calendar Selector - Search Panel*

- Region

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select enrolment officers acting in a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user.*

- District

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select enrolment officers acting in a specific district. *Note: The list will be only filled with the districts belonging to the selected region and assigned to the current logged in user.*

- Phone Number

Type in the beginning of; or the full **Phone Number** to search for enrolment officers with a Phone Number, that starts with or matches completely, the typed number.

- Email

Type in the beginning of; or the full **Email** to search for enrolment officers with the Email, which starts with or matches completely, the typed text.

- Historical

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.56).

CODE	LAST NAME	OTHER NAMES	BIRTH DATE	PHONE NUMBER	REGION	DISTRICT	VALID FROM	VALID TO
<a href="#">agent</a>	agent	agent			Maritime	Préfecture du Golfe	05/06/2017	
E001	Fox	James	13/06/1984	+420602404655	TestRegion	TestDistrict1	09/05/2017	
E002	Shark	John	12/06/1984	+420111111111	TestRegion	TestDistrict1	09/05/2017	
<del>E002</del>	<del>Shark</del>	<del>John</del>	<del>12/06/1984</del>	-	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>09/05/2017</del>	<del>09/05/2017</del>
E003	James	Ellis	26/12/1988		TestRegion	TestDistrict2	09/05/2017	
E004	Park	Jack	14/06/1994		TestRegion	TestDistrict1	09/05/2017	
E005	Shakespeare	Magi	26/12/1988		TestRegion	TestDistrict3	09/05/2017	
<del>E006</del>	<del>Bruno</del>	<del>Kate</del>	<del>25/12/2016</del>	-	<del>Region</del>	<del>Dodoma</del>	<del>09/05/2017</del>	<del>09/05/2017</del>
<del>E006</del>	<del>Bruno</del>	<del>Kate</del>	<del>25/12/2016</del>	-	<del>Region</del>	<del>Dodoma</del>	<del>09/05/2017</del>	<del>09/05/2017</del>
E007	Cook	John	14/06/1994		TestRegion		07/06/2017	
E010	Black	James	14/06/1994		National		07/06/2017	

Img. 1.3.56: Historical records - Result Panel

- Search Button

Once the criteria have been entered, use the **search** button to filter the records, the results will appear in the result panel.

## 2. Result Panel

CODE	LAST NAME	OTHER NAMES	BIRTH DATE	PHONE NUMBER	REGION	DISTRICT	VALID FROM	VALID TO
<a href="#">agent</a>	agent	agent			Maritime	Préfecture du Golfe	05/06/2017	
E001	Fox	James	13/06/1984	+420602404655	TestRegion	TestDistrict1	09/05/2017	
E002	Shark	John	12/06/1984	+420111111111	TestRegion	TestDistrict1	09/05/2017	
E003	James	Ellis	26/12/1988		TestRegion	TestDistrict2	09/05/2017	
E004	Park	Jack	14/06/1994		TestRegion	TestDistrict1	09/05/2017	
E005	Shakespeare	Magi	26/12/1988		TestRegion	TestDistrict3	09/05/2017	
E007	Cook	John	14/06/1994		TestRegion		07/06/2017	
E010	Black	James	14/06/1994		National		07/06/2017	
E1001	Ngaiza	Aïen	13/05/1985	0768108131	Region	Dodoma	17/05/2017	

Img. 1.3.57: Image 63 - Selected record (blue), hovered records (yellow) - Result Panel

The result panel displays a list of all officers found, matching the selected Criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.57). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.58)



Img. 1.3.58: Page selector- Result Panel

### 3. Button Panel

With exception of the **Cancel** button, which re-directs to the *Home Page*, the button panel (the buttons **Edit** and **Delete** is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once an officer has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Enrolment Officer Page

### 1. Data Entry

 The screenshot shows a web form titled 'Enrolment Officers Details' and 'Feedback Collector Details'. The 'Enrolment Officers Details' section includes input fields for Code (E003), Other Names (Ellis), Last Name (James), Birth Date (26/12/1988), Phone, Email (ellis@gmail.com), Permanent Address, Region (dropdown), District (Bahia), Substitution (dropdown), and Works To. There are checkboxes for 'Check All', 'Communicate', and 'Include Login'. The 'Feedback Collector Details' section includes input fields for Code, Last Name, Other Names, Phone, and Date of Birth (08/04/2019). At the bottom, there are 'Save' and 'Cancel' buttons.

Img. 1.3.59: Image - Enrolment Officer Page

#### Enrolment Officers Details

- Code

Enter the code for the enrolment officer. Mandatory, 8 characters maximum.

- **Last Name**

Enter the last name (surname) for the enrolment officer. Mandatory, 100 characters maximum.

- **Other Names**

Enter other names of the enrolment officer. Mandatory, 100 characters maximum.

- **Date of Birth**

Enter the date of birth for the enrolment officer. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Phone Number**

Enter the phone number for the enrolment officer. 50 characters maximum.

- **Email**

Enter the e-mail address for the enrolment officer. 50 characters maximum.

- **Permanent Address Details**

Enter details of the place of living of the enrolment officer.

- **Region**

Select from the list of available regions the region to a district in which the enrolment officer will act. Mandatory

- **District**

Select from the list of available districts the district in which the enrolment officer will act. *Note: The list will be only filled with the districts belonging to the selected region.* Mandatory  
.

- **Substitution**

Select from the list of available enrolment officers the enrolment officer which will substitute the current enrolment officer. Substitution means that all prompts to renewals/feedback will be directed to the substituting enrolment officer. *Note: The list contains enrolment officers who already exist in the system and who have at least on location common with the enrolment officer to be substituted.*

- **Works To**

Enter the date which the substituted enrolment officer will work up to. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Communicate**

Check the box **Communicate** if the enrolment officer should receive SMS messages alerting him/her about a need of renewing policies of families/groups he/she is assigned to.

- **Municipalities**

Select from the list of available municipalities the municipality(s) which the enrolment officer is acting in, by either clicking on the **Check All** box at the top of the list of municipalities, or by selectively clicking on the **Check** box to the left of the municipality. Mandatory (at least one municipality must be selected).

- **Villages**

Select from the list of available villages the village(s) which the enrolment officer is acting in, by either clicking on the **Check All** box at the top of the list of villages, or by selectively clicking on the **Check** box to the left of the village. Villages are pre-selected based on the selected municipality. The pre-selection can be modified. Mandatory (at least one village must be selected).

- **village Officer Details**

- **Code**

Enter the code for the Village Executive officer. 25 characters maximum.

- **Last name**

Enter the last name (surname) for the Village Executive officer. 100 characters maximum.

- **Other Names**

Enter other names of the Village Executive officer. 100 characters maximum.

- **Phone Number**

Enter the phone number for the Village Executive officer. 25 characters maximum.

- **Email**

Enter the e-mail address for the Village Executive officer. 50 characters maximum.

- **Date of Birth**

Enter the date of birth for the Village Executive officer. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Include Login**

Enable the enrolment officer to use openIMIS web by creating web credentials (enrolment officers primary interface is the enrolment application running on android device that doesn't require openIMIS user), the change must be saved to be taken into account.

Img. 1.3.60: Image - Enrolment Officer Login

Once the login is created, it will be visible in the *User Control Page*

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Enrolment Officers Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the officer has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Enrolment Officers Control Page*.

## Adding an Enrolment Officer

Click on the **Add** button to re-direct to the *Enrolment Officer Page*.

When the page opens all entry fields are empty. See the *Enrolment Officer Page* for information on the data entry and mandatory fields

### Editing an Enrolment Officer

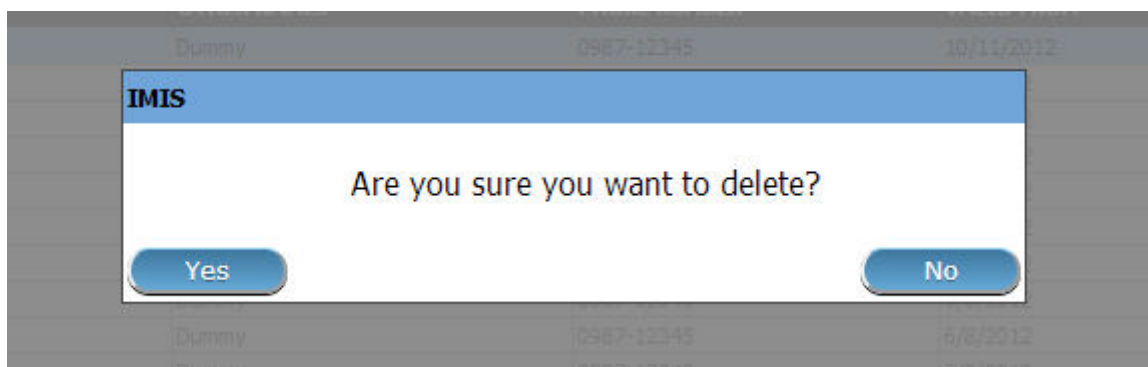
Click on the **Edit** button to re-direct to the *Enrolment Officer Page*.

The page will open with the current information loaded into the data entry fields. See the *Enrolment Officer Page* for information on the data entry and mandatory fields.

### Deleting an Enrolment Officer

Click on the **Delete** button to delete the currently selected record.

Before deleting a confirmation popup (Img. 1.3.61) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.3.61: Delete confirmation- Button Panel

When an officer is deleted, all records retaining to the deleted officer will still be available by selecting historical records.

## 1.3.10 Claim Administrators Administration

The register contains employees of contractual health facilities responsible for preparation and/or submission of claims. Administration of the register of claim administrators is restricted to users with the system role of Scheme Administrator or with a role including an access to Administration/Claim Administrators.

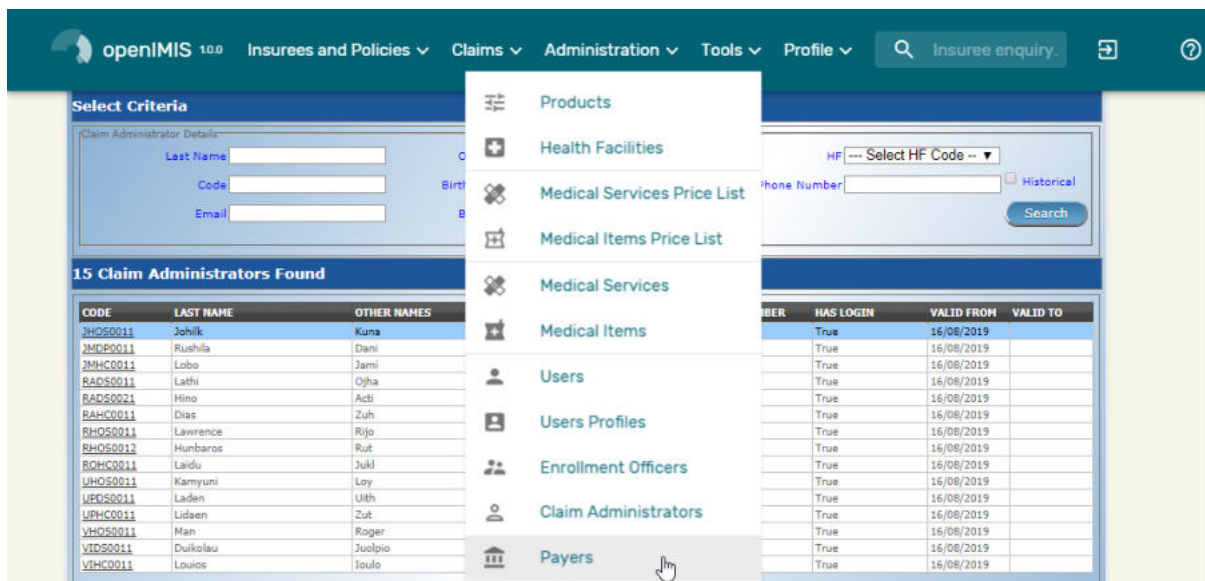
### Pre-conditions

A claim administrator may be added after the agreement of a contractual health facility and the management of the scheme administration. Entry of a claim administrator in the register of claim administrators doesn't mean that the claim administrator can login to IMIS. He/she has to be entered also in the register of users. It is facilitated by the ability to create the entry of a claim administrator into the register of claim administrators and the register of users simultaneously.

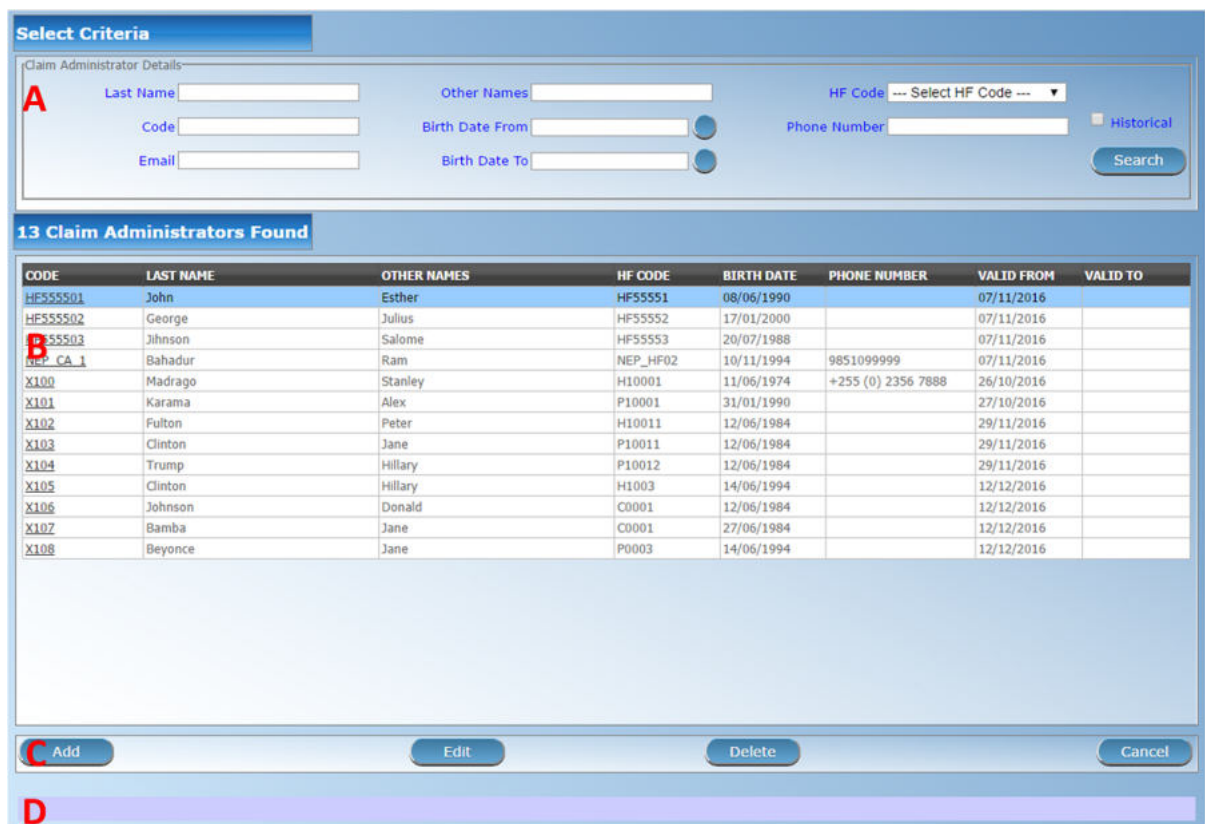
### Navigation

All functionality for use with the administration of claim administrators can be found under the main menu **Administration**, submenu **Claim Administrators**.

Clicking on the sub menu **Claim Administrators** re-directs the current user to the *Claim Administrators Control Page*.




Img. 1.3.62: Navigation Claim Administrators



Img. 1.3.63: Claim Administrators Control Page



## Claim Administrators Control Page

The **Claim Administrators Control Page** is the central point for the administration of all claim administrators. By having access to this panel, it is possible to add, edit, delete and search claim administrators. The panel is divided into four panels ().

### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. In the case of claim administrators the following search options are available which can be used alone or in combination with each other.

- **Last Name**

Type in the beginning of; or the full **Last name**; to search for claim administrator with a **Last name**, which starts with or matches completely, the typed text.

- **Code**

Type in the beginning of; or the full **Code** to search for claim administrator with a **Code**, which starts with or matches completely, the typed text.

- **Other Names**

Type in the beginning of; or the full **Other Names** to search for claim administrator with **Other Names** which starts with or matches completely, the typed text.


- **Birth Date From**

Type in a date; or use the Date Selector Button, to enter the **Birth Date From** to search for claim administrators having the same or later birth date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Birth Date To**

Type in a date; or use the Date Selector Button, to enter the **Birth Date To** to search for claim administrators having the same or earlier birth date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At any time during the use of the pop-up, the user can see the date of *today*.
- Clicking on *today* will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.





Calendar Selector - Search Panel

- **HF Code**

Select **HF Code** (a health facility code); from the list of health facility codes by clicking on the arrow on the right of the selector to select claim administrators from a specific health facility. *Note: The list will only be filled with the health facilities from districts which are assigned to the current logged in user.*

- **Phone Number**

Type in the beginning of; or the full **Phone Number** to search for claim administrators with a **Phone Number**, which starts with or matches completely, the typed number.

- **Email**

Type in the beginning of; or the full **email** to search for claim administrators with an e-mail, which starts with or matches completely, the typed text.

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (*Image Insuree Enquiry Results*).

CODE	LAST NAME	OTHER NAMES	BIRTH DATE	PHONE NUMBER	DISTRICT	VALID FROM	VALID TO
<del>003001</del>	<del>van Hoppe</del>	<del>Hans</del>	<del>16/03/1970</del>	<del>0782028017</del>	<del>Dodoma</del>	<del>10/08/2012</del>	<del>10/08/2012</del>
0203001	TestOfficer	OtherOfficer	17/01/2012		Chemba	21/08/2012	
<del>03001</del>	<del>van Hoppe</del>	<del>Hans</del>	<del>16/03/1970</del>	<del>0782028017</del>	<del>Dodoma</del>	<del>10/08/2012</del>	<del>10/08/2012</del>
2003001	van Hoppe	Hans	16/03/1970	0782028017	Bahi	10/08/2012	
<del>2003001</del>	<del>van Hoppe</del>	<del>Hans</del>	<del>16/03/1970</del>	<del>0782028017</del>	<del>Dodoma</del>	<del>10/08/2012</del>	<del>10/08/2012</del>
<del>2003001</del>	<del>van Hoppe</del>	<del>Hans</del>	<del>16/03/1970</del>	<del>0782028017</del>	<del>Dodoma</del>	<del>10/08/2012</del>	<del>10/08/2012</del>
2003002	Backhurst	Paul	11/06/1963	0784548321	Bahi	12/08/2012	

Img. 1.3.64: Historical records - Result Panel

- **Search Button**

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The Result Panel displays a list of all claim administrators found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.65). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.66)

## 3. Button Panel

CODE	LAST NAME	OTHER NAMES	BIRTH DATE	PHONE NUMBER	DISTRICT	VALID FROM	VALID TO
0203001	TestOfficer	OtherOfficer	17/01/2012		Chemba	21/08/2012	
2003001	van Hoppe	Hans	16/03/1970	0782028017	Bahi	10/08/2012	
2003002	Badhurst	Paul	11/06/1963	0784548321	Bahi	12/08/2012	
20030099	Kasekenya	Naomi Msongwe	02/03/1955	0756200200	Dodoma	16/08/2012	
3014002	nwantungamo	mugisha	01/07/1983	0783 966312	Kondoa	15/08/2012	
3014003	kova	twaha husein	16/01/1970	0786358358	Kondoa	15/08/2012	
3086001	Lupeja	Richard Mathew	03/06/1970	0713888765	Kongwa	15/08/2012	

Img. 1.3.65: Selected record (blue), hovered records (yellow) - Result Panel



Img. 1.3.66: Page selector- Result Panel

With exception of the **Cancel** button, which re-directs to the *Home Page*, the button panel (the buttons **Edit** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

#### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once an officer has been added, updated or deleted or if there was an error at any time during the process of these actions.

### Claim Administrator Page

#### 1. Data Entry

Img. 1.3.67: Claim Administrator Page

#### claim administrator details

- **Code**

Enter the code for the claim administrator. Mandatory, 8 characters maximum.

- **Last name**

Enter the last name (surname) for the claim administrator. Mandatory, 100 characters maximum.

- **Other Names**

Enter other names of the claim administrator. Mandatory, 100 characters maximum.

- **Date of Birth**

Enter the date of birth for the claim administrator. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Phone Number**

Enter the phone number for the claim administrator. 50 characters maximum.

- **Email**

Enter the e-mail for the claim administrator. 50 characters maximum.

- **HF Code**

Select from the list of available health facilities the health facility which the claim administrator will have access to and will act for. Mandatory.

- **Include Login**

Enable the claim administrator to use openIMIS web by creating web credentials (claim administrators primary interface is the claim application running on android device that doesn't require openIMIS user), the change must be saved to be taken into account.

Img. 1.3.68: Image - Claim Administrator Login

Once the login is created, it will be visible in the *User Control Page*

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Claim Administrators Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the claim administrator has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right side of the corresponding field).

## 4. Cancel

By clicking on the Cancel button, the user will be re-directed to the *Claim Administrators Control Page*.

## Adding a Claim Administrator

Click on the **Add** button to re-direct to the *Claim Administrator Page*.

When the page opens all entry fields are empty. See the *Claim Administrator Page* for information on the data entry and mandatory fields

## Editing a Claim Administrator

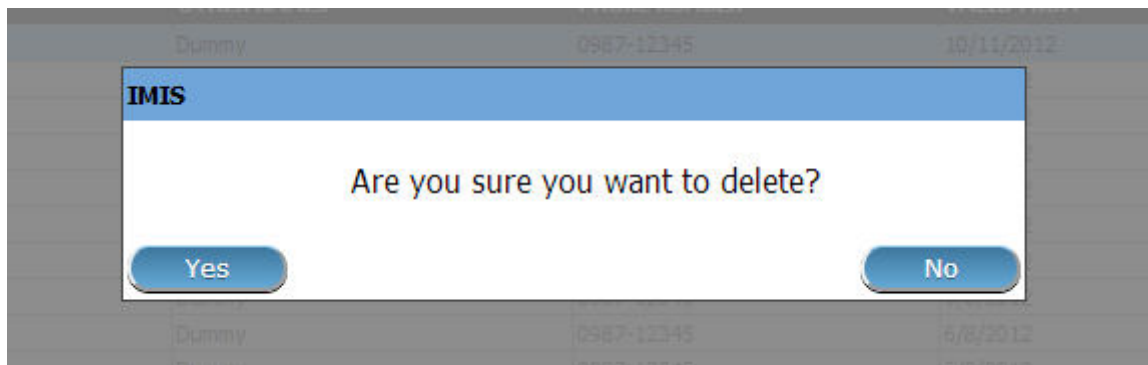
Click on the **Edit** button to re-direct to the *Claim Administrator Page*.

The page will open with the current information loaded into the data entry fields. See the *Claim Administrator Page* for information on the data entry and mandatory fields

## Deleting a Claim Administrator

Click on the **Delete** button to delete the currently selected record

Before deleting a confirmation popup (Img. 1.3.69) is displayed, which requires the user to confirm if the action should really be carried out.



Img. 1.3.69: Delete confirmation- Button Panel

When a claim administrator is deleted, all records retaining to the deleted claim administrator will still be available by selecting historical records.

### 1.3.11 Payers Administration

The register of payers contains all institutional payers that can pay contributions on behalf of policy holders (e.g. private organizations, local authorities, cooperatives etc.). Payer administration is restricted to users with the role of Scheme Administrator.

#### Pre-conditions

A payer may only be added or thereafter edited or deleted, after the approval of the management of the scheme administration.

#### Navigation

All functionality for use with the administration of payers can be found under the main menu **Administration**, sub menu **Payers**.

Clicking on the sub menu **Payers** re-directs the current user to the *Payer Control Page*.

#### Payer Control Page

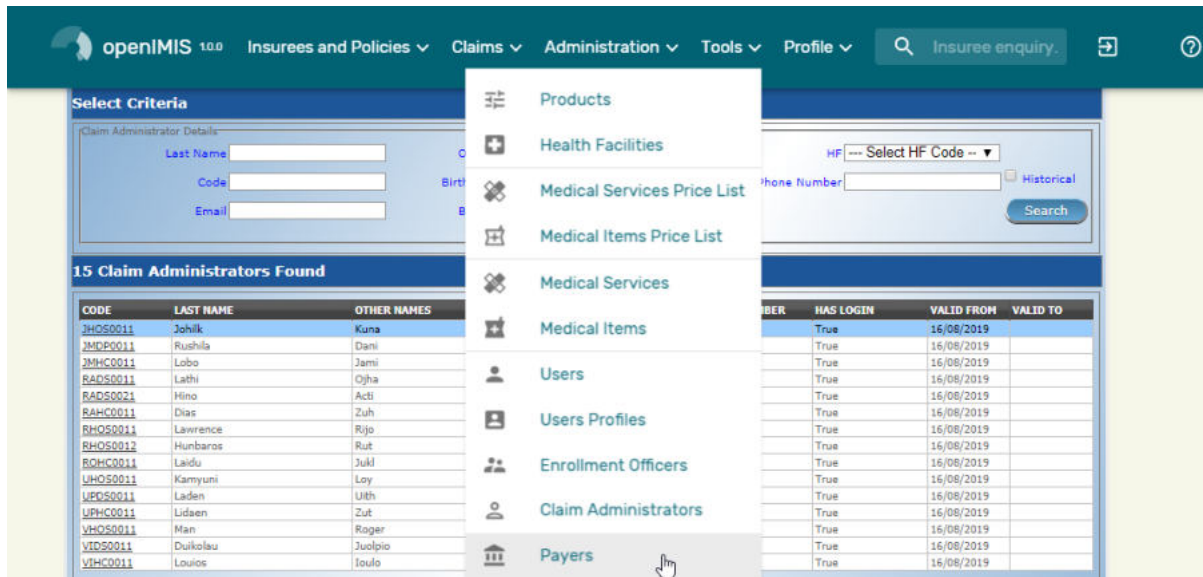
The Payer control Page is the central point for all payer administration. By having access to this page, it is possible to add, edit, delete and search (institutional) payers. The page is divided into four panels (Img. 1.3.71).

##### 1. Search Panel

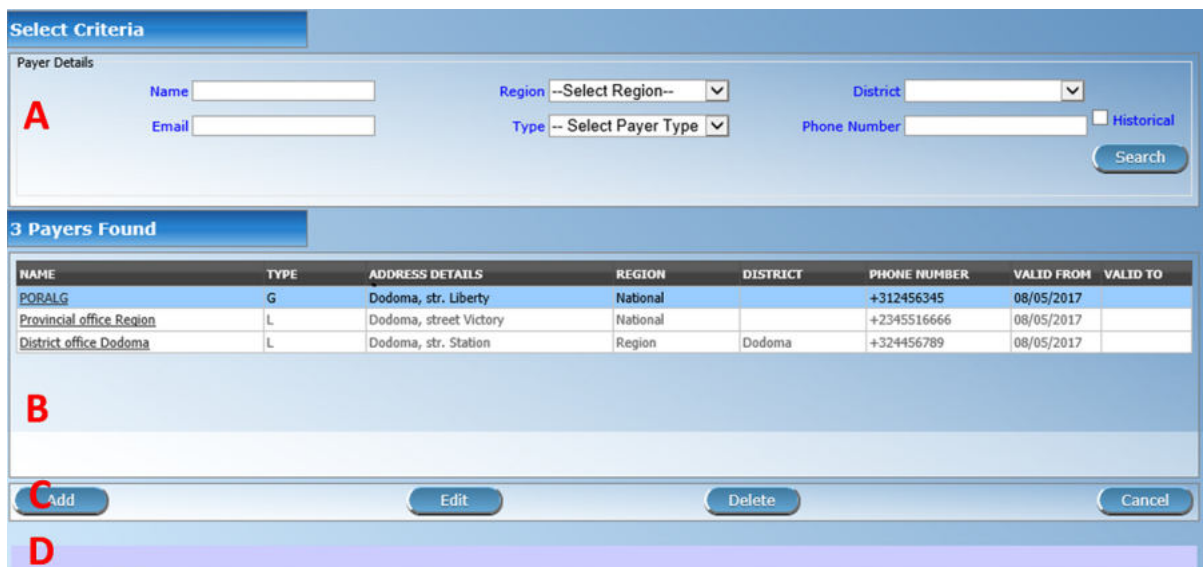
The search panel allows a user to select specific criteria to minimise the search results. In the case of payers the following search options are available which can be used alone or in combination with each other.

- Name

Type in the beginning of; or the full **name**; to search for payers with a **name**, that starts with or matches completely, the typed text.



Img. 1.3.70: Navigation Payers



Img. 1.3.71: Payers Control Page

- Email

Type in the beginning of; or the full Email to search for payers with an Email, that starts with or matches completely, the typed text.

- Region

Select the Region; from the list of regions by clicking on the arrow on the right of the selector to select payers from a specific region. The option **National** means that the payer is common for all regions. *Note: The list will only be filled with the regions assigned to the current logged in user and with the option National. All nationwide payers and all regional payers relating to the selected region will be found. If no district is selected then also all district payers for districts belonging to the selected region will be found.*

- District

Select the district; from the list of districts by clicking on the arrow on the right of the selector to select payers from a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the currently logged in user. If this is only one then the district will be automatically selected*

- Phone Number

Type in the beginning of; or the full Phone Number to search for payers with a Phone Number, that starts with or matches completely, the typed number.

- Type

Select the Type; from the list of types of payers by clicking on the arrow on the right of the selector to select payers of specific type.

- Historical

Click on Historical to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.3.72).

NAME	TYPE	ADDRESS DETAILS	REGION	DISTRICT	PHONE NUMBER	VALID FROM	VALID TO
<a href="#">PORALG</a>	G	Dodoma, str. Liberty	National		+312456345	08/05/2017	
Provincial office Region	L	Dodoma, street Victory	National		+2345516666	08/05/2017	
<del>Provincial office Region</del>	<del>L</del>	<del>Dodoma, str. Victory</del>	<del>Region</del>	<del>-</del>	<del>+2345516666</del>	<del>08/05/2017</del>	<del>08/05/2017</del>
District office Dodoma	L	Dodoma, str. Station	Region	Dodoma	+324456789	08/05/2017	

Img. 1.3.72: Historical records - Result Panel

- Search Button

Once the criteria have been entered, use the search button to filter the records, the results will appear in the result panel.

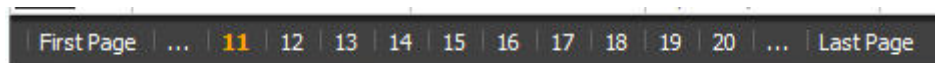
## 2. Result Panel

NAME	TYPE	ADDRESS DETAILS	REGION	DISTRICT	PHONE NUMBER	VALID FROM	VALID TO
<a href="#">PORALG</a>	G	Dodoma, str. Liberty	National		+312456345	08/05/2017	
Provincial office Region	L	Dodoma, street Victory	National		+2345516666	08/05/2017	
District office Dodoma	L	Dodoma, str. Station	Region	Dodoma	+324456789	08/05/2017	

Img. 1.3.73: Selected record (blue), hovered records (yellow) - Result Panel

The result panel displays a list of all payers found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.3.73). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.3.74).



Img. 1.3.74: *Page selector- Result Panel*

### 3. Button Panel

With exception of the **Cancel** button, which re-directs to the *Home Page*, the button panel (the buttons **Edit** and **Delete**) is used in conjunction with the current selected record (highlighted with blue). The user should first select a record by clicking on any position of the record except the leftmost hyperlink, and then click on the button.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a payer has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Payer Page

### 1. Data Entry

 A web form titled 'Payer Details' with a light blue background. It contains the following fields:
 

- Type**: A dropdown menu with 'Government' selected.
- Name**: A text input field containing 'PORALG'.
- Address**: A text area containing 'Dodoma, str. Liberty'.
- Region**: A dropdown menu with 'National' selected.
- District**: A dropdown menu.
- Phone Number**: A text input field containing '+312456345'.
- Fax**: A text input field containing '+3123679999'.
- Email**: An empty text input field.

 At the bottom of the form are two buttons: 'Save' on the left and 'Cancel' on the right.

Img. 1.3.75: *Payer Page*

- **Type**

Select the type of the payer from the list by clicking on the arrow on the right hand side of the lookup. Mandatory.

- **Name**

Enter the name for the payer. Mandatory, 100 characters maximum.

- **Address**

Enter address of the payer. Mandatory, 100 characters maximum.

- **Phone Number**

Enter the phone number for the payer. 50 characters maximum.

- **Fax**

Enter the fax number for the payer. 50 characters maximum.



- **Email**

Enter the email for the payer. 50 characters maximum.

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to enter the region to which the payer belongs. The region **National** means that the payer is common for all regions. *Note: The list will only be filled with the regions assigned to the current logged in user and with the option National.* Mandatory.

- **District**

Select the **district** to which the payer belongs, from the list by clicking on the arrow on the right hand side of the lookup. *Note: The list will only be filled with the districts assigned to the selected region and currently logged in user. If this is only one then the district will be automatically selected.* It is not mandatory to enter a district. Not selecting a district will mean the payer operates in all districts of the region or nationwide if the region National is selected.

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Payer Control Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the payer has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right of the corresponding data field).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Payer Control Page*.

## Adding a Payer

Click on the **Add** button to re-direct to the *Payer Page*.

When the page opens all entry fields are empty. See the *Payer Page* for information on the data entry and mandatory fields.


## Editing a Payer

Click on the **Edit** button to re-direct to the *Payer Page*.

The page will open with the current information loaded into the data entry fields. See the *Payer Page* for information on the data entry and mandatory fields.

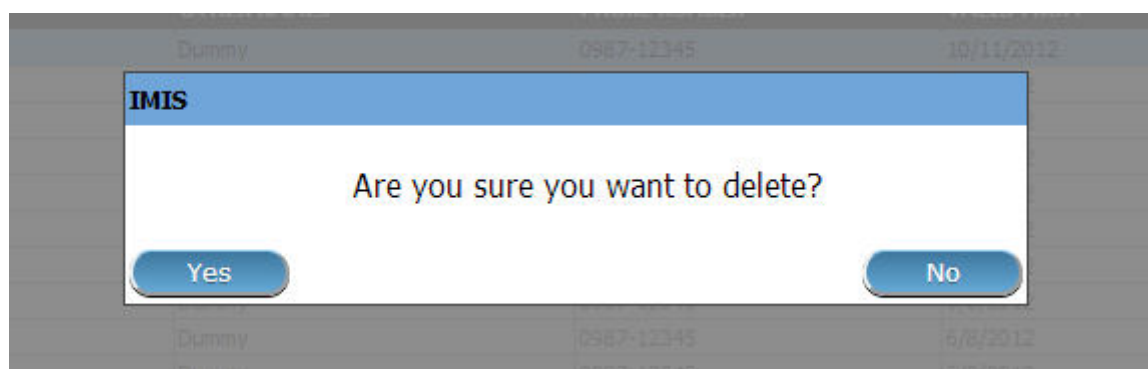
## Deleting a Payer

Click on the **Delete** button to delete the currently selected record.

Before deleting a confirmation popup () is displayed, which requires the user to confirm if the action should really be carried out?

When a payer is deleted, all records retaining to the deleted payer will still be available by selecting historical records.





Img. 1.3.76: Delete confirmation- Button Panel

### 1.3.12 Locations Administration

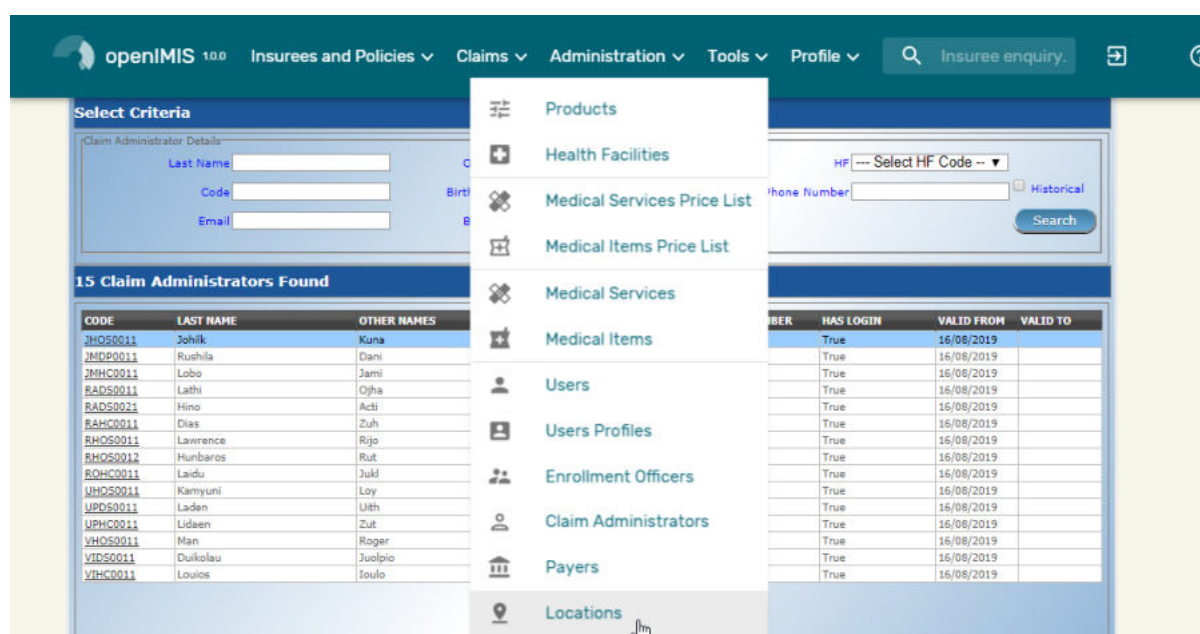
Administration of locations is restricted to users with the the system role of IMIS Administrator or with a role including an access to Administration/Locations. The user can see only locations he/she has access to.

#### Pre-conditions

A region, district, municipality or village may only be added or thereafter edited, after the approval of the management of the scheme administration.

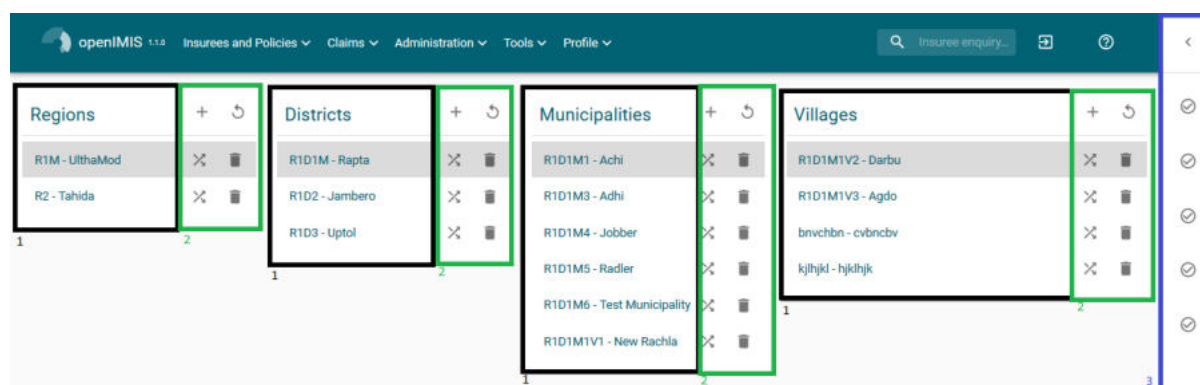
#### Navigation

All functionality for use with the administration of locations can be found under the main menu **Administration**, sub menu **Locations**.



Img. 1.3.77: Navigation Locations

Clicking on the sub menu **Locations** re-directs the current user to the *Locations Page*.



Img. 1.3.78: *Locations Page*

## Locations Page

The Locations page is the central point for all locations administration. By having access to this page, it is possible to add, edit, delete and move regions, districts, municipalities and villages. The page is divided into three panels (Img. 1.3.78). *Note. Only regions and districts with associated municipalities and villages, belonging to the logged in user will be available to edit or delete. On adding a new region or district, the user will automatically become associated with this region or district.*




### 1. Locations Panel

This is the working panel and is divided into four vertical panels of **Regions**, **Districts**, **Municipalities** and **Villages**.

### 2. Button Panel

It has three buttons, **Add** (Img. 1.2.7), **Delete** (Img. 1.3.81) and **Move** (Img. 1.3.79) for actions on the locations, double click on a location will open the edit modal box.

Tab. 1.3.3: Material design button

		
Img. 1.3.79: 'Move'	Img. 1.3.80: <i>Refresh</i>	Img. 1.3.81: <i>Delete</i>

### 3. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a region, district or municipality or village has been added, updated, moved or deleted or if there was an error at any time during the process of these actions.

## Adding a Region, District, Municipality, Village

Focusing on the appropriate level of locations by clicking on the **Add** button will open up a modal entry box. Here one could enter the new code (**Code**) and name (**Name**) of a region, district, municipality or village. For villages, the number of male inhabitants (**M**), female inhabitants (**F**), inhabitants with the unspecified gender (**O**) and the number of families (**Fam.**) can be specified. On clicking the **Save** button the new record will be saved.

## Editing a Region, District, Municipality, Village

Selecting the location to edit and clicking on the **Edit** button will open up in the top of the screen an entry box with the name of the location. Here one could change the name. On clicking the **Save** button, the record will be saved.

## Deleting a Region, District, Municipality, Village

Select first the location to delete and click the **Delete** button. *Note. It is not possible to delete a region, district or municipality with associated districts, municipalities or villages respectively.*

Before deleting a confirmation popup (Img. 1.3.82) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.3.82: Delete confirmation – Location Page

When a region, district, municipality or village is deleted, all records retaining to the deleted region, district, municipality or village will still be available by selecting historical records.

## Moving a District, Municipality, Village

Moving of a location is needed when the administrative division of the territory, on which a health insurance scheme is active, changes. Clicking on the **Move** button will open the move location box (Img. 1.3.83).

### 1. Move Location box

The move location box is composed of three sections, the first display the name of the location to be moved. The second display the name of the current parent when the third enable the selection of the future parents.

For moving a location, select the new parents (village, municipality, district), the fields will appear when needed, for example the municipality drop-down list will be displayed only if the district is selected. The level of the location can be changed by choosing the lower (resp. higher) parent having a different level from the current parent; be aware that the lowest location is the village, therefore if a municipality is moved to village level then the villages under the moved municipality will remain villages but will be moved under the municipality chosen the new parent of the to-be moved municipality.

The Move will be effective once the **Move** button is clicked.

Img. 1.3.83: *Move Location Page*

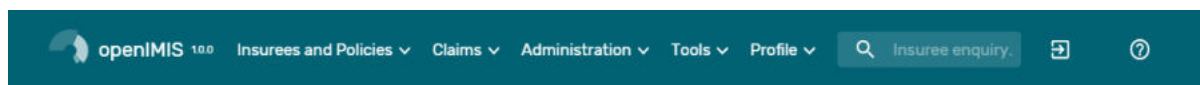
## 1.4 Group/family, Insurees and Policies

In openIMIS the policies are assigned to group only, if a policy need to be assigned to an individual then a group of one must be created.

Because of this approach, the *Family Overview Page* is the starting point to manage, insuree (add, edit), policies(add, edit, renew ...) and contribution

### 1.4.1 Insuree Enquiry

This functionality is available to all system roles or with a role including an access to Insurees and Families/Insuree/Enquiry. The function Insuree Enquiry can be accessed at any time, after login. On the top right hand of the main menu, there is a search feature, allowing the user to enter an Insurance Number for a “quick enquiry”.



Img. 1.4.1: *Insuree Enquiry Field*

By typing in a valid insurance number and pressing the enter key or clicking on the green search button, a pop-up will appear (Img. 1.4.1), providing a photo of the insuree and information about the current policy or policies covering of the insuree.

The Information includes the following:

- The photo of the insuree
- The name, date of birth and gender of the insuree
- The (insurance) product code, product name and expiry date of a policy
- The status (I for Idle, A for Active, S for Suspended and E for Expired) of the policy at the time of inquiring

- The deductible amount remaining for the insuree to pay before the policy is claimable, for hospitals and non-hospitals
- The ceiling amount claimable by a health facility on behalf of the insuree for both hospitals and non-hospitals.
- Age of the insuree
- First Service Point (FSP) of the insuree
  - Region of FSP
  - District of FSP
  - Level of FSP

CODE	NAME	EXPIRE DATE	STATUS	HOSPITAL DEDUCTION	NON-HOSPITAL DEDUCTION	HOSPITAL CEILING	NON-HOSPITAL CEILING
NF01	National free enrolment	10/07/2017	Expired			7500.00	7500.00
NF01	National free enrolment	02/08/2018	Expired			10000.00	10000.00

ADMISSIONS LEFT	VISITS LEFT	CONSULTATIONS LEFT	SURGERIES LEFT	DELIVERIES LEFT	ANTENATAL LEFT	ADMISSION AMOUNT/CLAIM	CONSULTATION AMOUNT/CLAIM	SURGERY AMOUNT/CLAIM	DELIVERY AMOUNT/CLAIM	ANTENATAL AMOUNT/CLAIM
2	2	2	1		1	6,000.00	2,000.00	4,000.00	5,000.00	1,000.00

Img. 1.4.2: Image - Insuree Enquiry Results

## 1.4.2 Family/Group

### Find Family

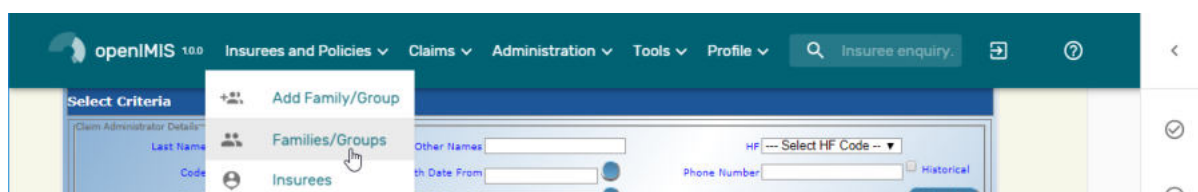
Access to the Find Family Page is restricted to users with the system roles of Accountant, Clerk and Health Facility Receptionist or with a role including an access to Insurees and Families/Family/Enquiry.

#### Pre-conditions

Need to enquire on, or edit a family and/or insurees, policies and contributions associated.

#### Navigation

Find Family can be found under the main menu **Insurees** and **Policies** sub menu **Families/Groups**



Img. 1.4.3: Navigation – Families - Find Family

Clicking on the sub menu **Families/Groups** re-directs the current user to the *Find Family Page*.

**Select Criteria**

Family/Group

**A**

Last Name  Other Names  Region

Insurance Number  Birth Date From  District

Phone Number  Birth Date To  Municipality  ☐ Historical

Gender -- Select Gender -- Poverty Status -- Select Yes/No -- Village

Email  Confirmation No.

**4 Families/Groups Found**

INSURANCE NUMBER	LAST NAME	OTHER NAMES	REGION	DISTRICT	MUNICIPALITY	VILLAGE	POVERTY	VALID FROM	VALID TO
108010801	Joseph	Aila	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	No	30/05/2017	
00013	Paul	Lenon	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	No	24/05/2017	
111111161	Pick	James	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	Yes	23/05/2017	
111111151	Queen	Jane	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	Yes	22/05/2017	

**C**

**D**

Img. 1.4.4: *Find Families*

The Find Family Page is the first step in the process of finding of a family and thereafter accessing the *Family Overview Page* of insurees, policies and contributions. This initial page can be used to search for specific families or groups based on specific criteria. The page is divided into four panels (Img. 1.4.4):

#### 1. Search Panel

The search panel allows a user to select specific criteria to minimise the search results. The following search options are available which can be used alone or in combination with each other.

- **Last Name**

Type in the beginning of; or the full **Last name**; to search for families/groups, who's family head/group head **Last name**, starts with or matches completely, the typed text.

- **Other Names**

Type in the beginning of; or the full **Other Names** to search for families/groups, who's family head/group head **Other Names** starts with or matches completely, the typed text.

- **Insurance Number**

Type in the beginning of; or the full **Insurance Number** to search for families/groups, who's family head/group head **Insurance Number**, starts with or matches completely, the typed text.

- **Phone Number**

Type in the beginning of; or the full **Phone Number** to search for families/groups, who's family head/group head **Phone Number**, starts with or matches completely, the typed number.

- **Birth Date From**

Type in a date; or use the Date Selector Button, to enter the **Birth Date From** to search for families/groups, who's family head/group head, has the same or later

birth date than **Birth Date From**. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Birth Date To**

Type in a date; or use the Date Selector Button, to enter the **Birth Date To** to search for families/groups, who's family head/group head, has the same or earlier birth date than **Birth Date To**. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Tab. 1) by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of **today**.
- Clicking on *today* will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



*Calendar Selector - Search Panel*

- **Gender**

Select the **Gender**; from the list of gender by clicking on the arrow on the right of the selector, to select families/groups, who's family head/group head is of the specific gender.

- **Poverty Status**

Select the **Poverty Status**; from the list of has poverty status by clicking on the arrow on the right of the selector, to select families/groups that have a specific poverty status.

- **Email**

Type in the beginning of; or the full **Email** to search for families/groups, who's family head/group head **Email** starts with or matches completely the typed text.

- **Confirmation Type**

Type in the beginning of; or the full **Confirmation Type** to search for families/groups, who's **Confirmation Type**. starts with or matches completely the typed text.



- Confirmation No.

Type in the beginning of; or the full Confirmation No. to search for families/groups, who's Confirmation No. starts with or matches completely the typed text.

- Region

Select the Region; from the list of regions by clicking on the arrow on the right of the selector to select families/groups from a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- District

Select the District; from the list of districts by clicking on the arrow on the right of the selector to select families/groups from a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- Municipality

Select the Municipality; from the list of municipalities by clicking on the arrow on the right of the selector to select families/groups from a specific municipality. *Note: The list will only be filled with the municipalities in the selected district above.*

Select the Village; from the list of villages by clicking on the arrow on the right of the selector to select families/groups from a specific village. *Note: The list will only be filled with the villages in the selected municipality above.*

- Historical

Click on Historical to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.4.5).

INSURANCE NUMBER	LAST NAME	OTHER NAMES	REGION	DISTRICT	MUNICIPALITY	VILLAGE	POVERTY	VALID FROM	VALID TO
<del>111111199</del>	<del>Bock</del>	<del>John</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>TestMunicipality12</del>	<del>TestVillage122</del>	<del>Yes</del>	<del>18/06/2017</del>	<del>18/06/2017</del>
<del>111111199</del>	<del>Bock</del>	<del>John</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>TestMunicipality12</del>	<del>TestVillage122</del>	<del>Yes</del>	<del>18/06/2017</del>	<del>18/06/2017</del>
8007870	Soni	Hiren	TestRegion	TestDistrict1	TestMunicipality11	TestVillage111	No	09/06/2017	
111111212	Medley	Elis	TestRegion	TestDistrict1	TestMunicipality11	TestVillage111	Yes	31/05/2017	
111111191	Garbeight	James	TestRegion	TestDistrict1	TestMunicipality11	TestVillage111	Yes	30/05/2017	
111111181	Travolta	John	TestRegion	TestDistrict1	TestMunicipality11	TestVillage111	Yes	30/05/2017	
108010801	Joseph	Alia	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	No	30/05/2017	

Img. 1.4.5: Historical records - Result Panel

- Search Button

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

INSURANCE NUMBER	LAST NAME	OTHER NAMES	REGION	DISTRICT	MUNICIPALITY	VILLAGE	POVERTY	VALID FROM	VALID TO
108010801	Joseph	Alia	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	No	30/05/2017	
99013	Paul	Lenon	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	No	24/05/2017	
111111161	Pick	James	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	Yes	23/05/2017	
111111151	Queen	Jane	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	Yes	22/05/2017	

Img. 1.4.6: Selected record (blue), hovered records (yellow) - Result Panel

The Result Panel displays a list of all families/groups found, matching the selected criteria in the Search Panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.4.6). The leftmost record contains a hyperlink which if clicked, re-directs the user to the *Family Overview*



Page for the Family selected or if it is an historical record then the [Change Family Page](#), for detailed viewing.

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.4.7)



Img. 1.4.7: Page selector- Result Panel

### 3. Button Panel

The **Cancel** button re-directs to the [Home Page](#).

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a family/group has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Family/Group Overview

Access to the *Family Overview Page* is restricted to users with the system role of Accountant or Clerk or with a role including an access to Insurees and Families.

### Pre-conditions

Need to enquire on, or edit a family/group or manage the insurees, policies and contributions associated with it.

### Navigation

*Family Overview Page* cannot be navigated directly to; the first step is to find the family/group by means of using *Find Family Page*, *Find Insuree Page*, *Find Policy Page* or *Find Contribution Page*. Once a specific family, insuree, policy or contribution is selected by means of selecting the hyperlink in the Result Panel of the respective Find Page, the user is re-directed to the *Family Overview Page*.

## Family Overview Page

The **Family Overview Page** is the central point for all operations with regards to the families/groups, Insurees, policies and contributions associated with it. The page is divided into 6 panels (*Image Family overview*)




### 1. Family /Group Panel

The Family/Group Panel provides information about the family including the Insurance Number and the Last Name and Other Names of the head of family and the District, Municipality, Village and Poverty status of the family. In the Family/Group panel action buttons allow to add, edit and delete the family/group.



### 2. Insurees Panel

The Insurees Panel displays a list of the insurees within the family/group. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.4.10). The leftmost record contains a hyperlink which if clicked, re-directs the user to the insuree record for editing or detailed viewing.

In the Insurees Panel, action buttons allow to add, edit and delete insurees belonging to the family/group.





**Family/Group**   

Insurance Number 555444221      Region TestRegion      Poverty Status Yes      Address Details  
 1 Last Name Speed      District TestDistrict4      Confirmation Type Local council  
 Other Names Jack      Municipality TestMunicipality41      Confirmation No. 123456  
 Family / Group Type Household      Village TestVillage411

**Insurees**   




INSURANCE NUMBER	LAST NAME	OTHER NAMES	GENDER	BIRTH DATE	BENEFICIARY CARD
555444221	Speed	Jack	Male	21/07/1994	<input checked="" type="checkbox"/>
555444222	Speed	Luisa	Female	10/05/1993	<input checked="" type="checkbox"/>

2

**Policies**    

ENROL DATE	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER	POLICY STATUS	POLICY VALUE	VALID FROM	VALID TO
03/08/2017	03/08/2017	03/08/2017	02/08/2018	NFD1	Cook John	Expired	14,000.00	03/08/2017	
11/07/2016	11/07/2016	11/07/2016	10/07/2017	NFD1	Black James	Expired	19,000.00	09/07/2017	

3

**Contributions**   

PAYMENT DATE	PAYER	AMOUNT	PAYMENT TYPE	RECEIPT NO.	CONTRIBUTION CATEGORY	MATCHED AMOUNT
03/08/2017		14,000.00	Cash	asd	Contribution	

4

5 Cancel

6

Img. 1.4.8: Image - Family Overview Page



Img. 1.4.9: Image 114

The green plus sign is for adding a new family/group via the *Family/Groupe Page*.

The yellow pencil sign is for editing a family/group via the *Family/Groupe Page*.

The red cross sign is for deleting a family/group.

INSURANCE NUMBER	LAST NAME	OTHER NAMES	GENDER	BIRTH DATE	BENEFICIARY CARD
111111151	Queen	Jane	F	15/06/1994	<input checked="" type="checkbox"/>
111111152	Queen	John	M	06/05/1999	<input checked="" type="checkbox"/>
111111153	Queen	Getruda	F	12/06/1974	<input type="checkbox"/>
111111154	Queen	Loren	F	21/05/1999	<input checked="" type="checkbox"/>
111111155	Queen	Sonja	F	21/05/1999	<input checked="" type="checkbox"/>
111111156	Queen	Jack	M	19/05/1999	<input checked="" type="checkbox"/>

Img. 1.4.10: Selected record (blue), hovered records (yellow) – Insurees Panel



Img. 1.4.11: Image 116

The green plus sign is for adding a new insuree via the *Insuree Page*.

The yellow pencil sign is for editing an insuree via the *Insuree Page*.

The red cross sign is for deleting an insuree.

### 3. Policies Panel

The Policies Panel displays a list of the policies held by the family/group. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.4.12). The leftmost record contains a hyperlink which if clicked, re-directs the user to the policy for editing or detailed viewing. By default the first policy is selected and therefore in the Contribution Panel, only the contributions paid on that policy will be displayed in the Contribution Panel. By selecting another policy in the list, the Contribution Panel, will refresh with the contributions paid on the newly selected policy.

ENROL DATE	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER	POLICY STATUS	POLICY VALUE	VALID FROM	VALID TO
12/09/2011	28/09/2011	11/05/2011	29/01/2013	P-2-7	Edward John	Active	178,000.0	08/06/2012	
02/06/2011	21/06/2011	06/04/2012	03/09/2012	P-2-9	Msakio Sunday	Active	118,000.0	08/06/2012	

Img. 1.4.12: Selected record (blue), hovered records (yellow) - Policy Panel

In the fifth **Product** column of Policy data grid, there is a link showing product for the policy on the corresponding row. When the link is clicked; a popup browser window (:ref:image118) will open up showing the details of the product (in read-only mode).

The screenshot shows a 'Product Popup' window. On the left is a sidebar with 'Family/Group' information (Insurance Number 333222111, Last Name Faraji, Other Names Asma) and a 'Policies' list. The main area is titled 'Insurance Product details' and contains fields for Code (DXW001), Name (Waiting fixed enrolment), District (Dodoma), Date From (01/01/2015), Date To (01/01/2031), Conversion (Click button to load), Lump Sum (30,000.00), Threshold Members (3), Maximum Members (7), Contribution Adult (5,000.00), Contribution Child (3,000.00), Insurance Period (12), and Administration Period (0). On the right, there are sections for 'Medical Services' and 'Medical Items', each with a link to load them. At the bottom, there are fields for Account Code (Remuneration), Registration Lump Sum, Registration Fee (10,000.00), and Assembly.

Img. 1.4.13: Product Popup – Policies Panel

In the Policies Panel, action buttons allow to add, edit and delete policies.



Img. 1.4.14: Image 119

The green plus sign is for adding a new policy via the *Policy Page*.

The yellow pencil sign is for editing a policy via the *Policy Page*.

The red cross sign is for deleting a policy.

The blue R sign is for renewing a policy via the *Policy Page*.

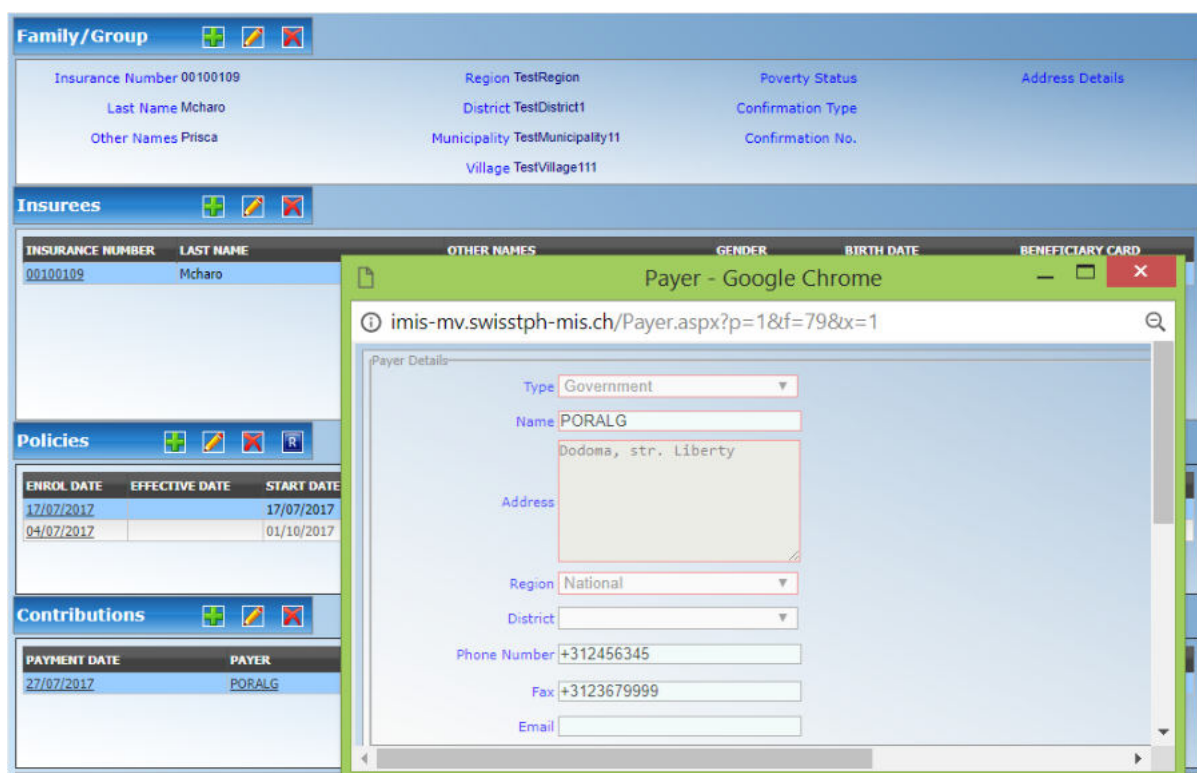
### 4. Contributions Panel

The Contribution Panel displays a list of contributions paid on the policy currently selected in the Policies Panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.4.15). The leftmost record contains a hyperlink which if clicked, re-directs the user to the contribution for editing or detailed viewing.

PAYMENT DATE	PAYER	AMOUNT	PAYMENT TYPE	RECEIPT NO.	CONTRIBUTION CATEGORY
10/05/2017		60,000.00	Bank Transfer	r4	Contribution
10/05/2017		4,000.00	Mobile Phone	r5	Contribution

Img. 1.4.15: Selected record (blue), hovered records (yellow) - Contributions Panel

In the second **Payer** column of Contributions data grid, there is a link showing (institutional) payer of the contribution on the corresponding row. When the link is clicked; a popup browser window (Img. 1.4.16) will open up showing the details of the payer in read-only mode.



Img. 1.4.16: Payer Pop up – Contribution Panel

In the Contributions Panel, action buttons allow to add, edit and delete contributions.



Img. 1.4.17: Image 122

The green plus sign is for adding a new contribution.

The yellow pencil sign is for editing a contribution.

The red cross sign is for deleting a contribution.

## 5. Button Panel

The Cancel button re-directs to the *Home Page*.

## 6. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once an insuree, a policy or a contribution have been added, updated or deleted or if there was an error at any time during the process of these actions.

## Family/Group Page

The screenshot shows the 'Family/Group Page' interface. It features two main panels. The top panel, 'Family/Group Details', includes dropdown menus for 'Region' (with '--Select Region--'), 'District', 'Municipality', 'Village', 'Poverty Status' (with '-- Select Yes/No --'), 'Confirmation Type' (with '-- Select Type --'), and 'Group Type' (with '-- Select Type --'). It also has a 'Permanent Address Details' text field and a 'Confirmation No.' text field. The bottom panel, 'Policy Holder', includes text fields for 'Insurance Number', 'Other Names', 'Last Name', and 'Birth Date', a 'Browse' button, and dropdown menus for 'Gender' (with '-- Select Gender --'), 'Marital Status' (with '-- Select Status --'), 'Beneficiary Card' (with '-- Select Yes/No --'), 'Current Region' (with '--Select Region--'), 'Current District', 'Current Municipality', 'Current Village', and 'Current Address Details'. At the bottom of the page are 'Save' and 'Cancel' buttons.

Img. 1.4.18: Family/Group Page

- **Region**

Select from the list of available regions the region, in which the head of family/group permanently stays. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.* Mandatory.

- **District**

Select from the list of available districts the district, in which the head of family/group permanently stays. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.* Mandatory.

- **Municipality**

Select from the list of available municipalities the municipality, in which the head of family/group permanently stays. *Note: The list will only be filled with the municipalities belonging to the selected district.* Mandatory.

- **Village**

Select from the list of available villages the village, in which the head of family/group permanently stays. *Note: The list will only be filled with the villages belonging to the selected municipality.* Mandatory.

- **Poverty Status**

Select whether the family/group has the poverty status.

- **Confirmation Type**

Select the type of a confirmation of the social status of the family/group.

- **Confirmation No.**

Enter alphanumeric identification of the confirmation of the social status of the family/group.

- **Group Type**

Select the type of the group/family.

- **Address Details.**

Enter details of the permanent address of the family/group.

- **Insurance Number**

Enter the insurance number for the head of family/group. Mandatory.

- **Last name**

Enter the last name (surname) for the head of family/group. Mandatory.

- **Other Names**

Enter other names of the head of family/group. Mandatory.

- **Birth Date**

Enter the date of birth for the head of family/group. *Note: You can also use the button next to the birth date field to select a date to be entered.*

- **Gender**

Select from the list of available genders the gender of the head of family/group. Mandatory.

- **Marital Status**

Select from the list of available marital statuses the marital status of the head of family/group.

- **Beneficiary Card**

Select from the list of card whether or not an insurance identification card was issued to the head of family/group.

- **Current Region**

Select from the list of available regions the region, in which the head of family/group temporarily stays.

- **Current District**

Select from the list of available districts the district, in which the head of family/group temporarily stays. *Note: The list will only be filled with the districts belonging to the selected region*

- **Current Municipality**

Select from the list of available municipalities the municipality, in which the head of family/group temporarily stays. *Note: The list will only be filled with the municipalities belonging to the selected district.*

- **Current Village**

Select from the list of available villages the village, in which the head of family/group temporarily stays. *Note: The list will only be filled with the villages belonging to the selected municipality.*

- **Current Address Details**

Enter details of the temporal address of the head of family/group.

- **Profession**

Select the profession of the head of family/group.

- **Education**

Select the education of the head of family/group.

- **Phone Number**

Enter the phone number for the head of family/group.

- **Email**

Enter the e-mail address of the head of family/group.

- **Identification Type**

Select the type of the identification document of the head of family/group.

- **Identification No.**

Enter alphanumeric identification of the document of head of family/group.

- **Region of FSP**

Select from the list of available regions the region, in which the chosen primary health facility (First Service Point) of the head of family/group is located.

- **District of FSP**

Select from the list of available districts the district, in which the chosen primary health facility (First Service Point) of the head of family/group is located.

*Note: The list will only be filled with the districts belonging to the selected region.*

- **Level of FSP**

Select the level of the chosen primary health facility (First Service Point) of the head of family/group.

- **First Service Point**

Select from the list of available health facilities the chosen primary health facility (First Service Point) of the head of family/group. *Note: The list will only be filled with the health facilities belonging to the selected district which are of the selected level.*

- **Browse**

Browse to get the photo for the head of family/group related to his/her insurance number.

1. **Saving**

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Family Overview Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the family member has been saved will appear on the Information Panel.

2. **Mandatory data**

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk).

3. **Cancel**

By clicking on the **Cancel** button, the user will be re-directed to the *Find Family Page*.



## Adding a Family

Click on the **Green Plus Sign** to re-direct to the *Family/Group Page*.

When the page opens all entry fields are empty. See the *Family/Group Page* for information on the data entry and mandatory fields.

## Editing a Family/Group

Click on the **Yellow Pencil Sign** to re-direct to the *Change Family/Group Page*

The page will open with the current information loaded into the data entry fields, plus there are options to change the head of the family/group and move an insuree to the family/group.

The screenshot shows the 'Change Family/Group' page. At the top, there is a summary of current information:

Insurance Number 111111151	Region TestRegion	Poverty Status Yes	Permanent Address Details
Last Name Queen	District TestDistrict2	Confirmation Type State	
Other Names Jane	Municipality TestMunicipality21	Confirmation No. d1223	
	Village TestVillage211		

Below this summary, there are three main sections:

- Change Family/Group**: A section with a title bar and a scrollable area containing dropdown menus for Region (TestRegion), District (TestDistrict2), Municipality (TestMunicipality21), Village (TestVillage211), Poverty Status (Yes), and Confirmation Type (State).
- Change Head of Family/Group**: A section with a title bar and a scrollable area. It contains a text input field for 'Enter the new Head of Family/Group Insurance Number', a 'Check' button, and a 'Change' button.
- Move Insurees**: A section with a title bar and a scrollable area. It contains a text input field for 'Enter the Insurance Number of Insuree to move', a 'Check' button, a 'Move' button, and a 'Cancel' button.

Img. 1.4.19: *Change Family/Group Page*

## Changing a Head of Family/Group

The head of the Family/Group is the main contact associated with a policy. For various reasons it may be necessary to change the head of a family/group. The new head must be a head of family in another family.

Enter the insurance number for the new head of family/group, click on check, to confirm that the insurance number is valid and that it really is the person expected. The name will appear to the right of the check button. If all is OK, click on the Change button to complete the change. On a successful change, the user will be re-directed back to the *Family Overview Page*; the new head will be displayed in the Family/Group Information Panel



## Moving an Insuree

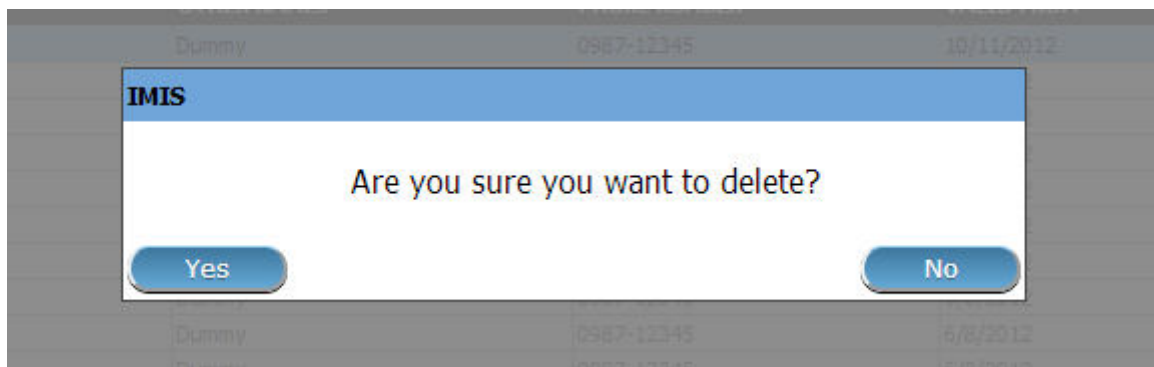
Insurees may be moved from one family/group to another. The new insuree must not be a head of family/group in another family/group.

Enter the insurance number for the insuree to move. Click on check, to confirm that the insurance number is valid and that it really is the person expected. The name will appear to the right of the check button. If all is OK, click on the Change button to complete the change. On a successful change, the user will be re-directed back to the *Family Overview Page* the new insuree will be displayed in the insuree Information Panel.

## Deleting a Family/Group

Click on the Red Cross Sign button to delete the currently selected record.

Before deleting a confirmation popup (Img. 1.4.20) is displayed, which requires the user to confirm if the action should really be carried out? Deleting of a family requires deleting of all its dependants first.



Img. 1.4.20: Delete confirmation- Button Panel

When a family is deleted, all records retaining to the deleted family will still be available by selecting historical records.

## 1.4.3 Insuree

### Find Insuree

Access to the Find Insuree Page is restricted to users with the system roles of Accountant, Clerk and Health Facility Receptionist or with a role including an access to Insurees and Families/Insuree/Search.

#### Pre-conditions

Need to enquire on, or edit an insuree, and the family/group, policies and contributions associated.

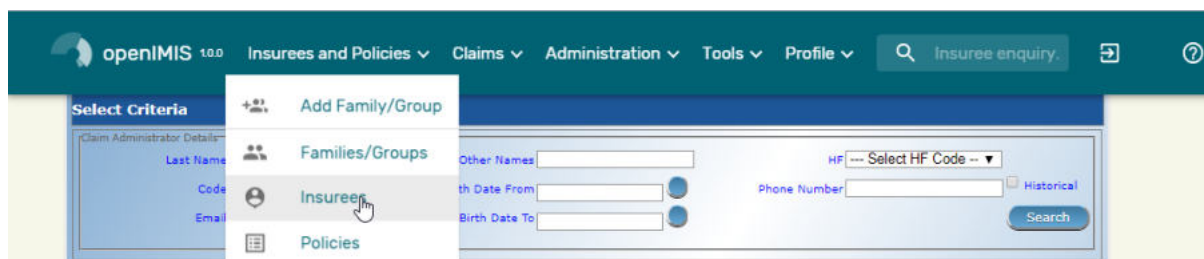
#### Navigation

All functionality for use with the administration of insurees can be found under the main menu **Insurees and Policies**, sub menu **Insurees**.

Clicking on the sub menu **Insurees** re-directs the current user to the Find Insuree Page.

#### Find Insuree Page

The **Find Insuree Page** is the first step in the process of finding an insuree and thereafter accessing the family/group overview of insurees, policies and contributions. This initial page can be used to search for specific Insurees or groups of



Img. 1.4.21: *Navigation Insurees*

**Select Criteria**

**Insuree**

**A**

Last Name  Other Names  Region

Insurance Number  Birth Date From  District

Phone Number  Birth Date To  Municipality  ☐ Historical

Email  Gender

Photo Assigned  Marital Status  Village

**14 Insurees Found**

INSURANCE NUMBER	LAST NAME	OTHER NAMES	MARITAL STATUS	GENDER	PHONE NUMBER	DATE OF BIRTH	REGION	DISTRICT	VALID FROM	VALID TO
00010	Backust	Paul		M		24/05/2017	TestRegion	TestDistrict2	24/05/2017	
108010801	Joseph	Alla		M		03/05/1987	TestRegion	TestDistrict2	30/05/2017	
<b>B</b> 0012	Paul	Lidya	W	F		30/05/2017	TestRegion	TestDistrict2	24/05/2017	
00013	Paul	Lenon		M		24/05/2017	TestRegion	TestDistrict2	24/05/2017	
111111164	Pick	Patricie	S	F		11/06/2013	TestRegion	TestDistrict2	23/05/2017	
111111163	Pick	John	S	M		14/06/2016	TestRegion	TestDistrict2	23/05/2017	
111111162	Pick	Elise	M	F		09/05/1993	TestRegion	TestDistrict2	23/05/2017	
111111161	Pick	James	M	M		13/07/1995	TestRegion	TestDistrict2	23/05/2017	
111111154	Queen	Loren	S	F		21/05/1999	TestRegion	TestDistrict2	22/05/2017	
111111155	Queen	Sonja	S	F		21/05/1999	TestRegion	TestDistrict2	22/05/2017	
111111152	Queen	John	M	M		06/05/1999	TestRegion	TestDistrict2	22/05/2017	
111111156	Queen	Jack	S	M		19/05/1999	TestRegion	TestDistrict2	22/05/2017	
111111153	Queen	Getruda	D	F		12/06/1974	TestRegion	TestDistrict2	22/05/2017	
111111151	Queen	Jane	M	F		15/06/1994	TestRegion	TestDistrict2	22/05/2017	

**C**

**D**

Img. 1.4.22: *Find Insuree Page*

insurees based on specific criteria. The panel is divided into four panels ([Img. 1.4.22](#))

## 1. Search Panel

The Search Panel allows a user to select specific criteria to minimise the search results. In the case of insurees the following search options are available, which can be used alone or in combination with each other.

- **Last Name**

Type in the beginning of; or the full **Last name**; to search for insurees with a **Last name**, which starts with or matches completely, the typed text.

- **Other Names**

Type in the beginning of; or the full **Other Names** to search for insurees with **Other Names** which starts with or matches completely, the typed text.

- **Insurance Number**

Type in the beginning of; or the full **Insurance Number** to search for insurees with the **Insurance Number**, which starts with or matches completely, the typed text.

- **Marital Status**

Select the **Marital Status**; from the list of marital status by clicking on the arrow on the right of the selector, to select insurees of a specific marital status.

- **Phone Number**

Type in the beginning of; or the full **Phone Number** to search for insurees with a **Phone Number**, which starts with or matches completely, the typed number.

- **Birth Date From**

Type in a date; or use the Date Selector Button, to enter the **Birth Date From** to search for insurees who have the same or later birth date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Birth Date To**

Type in a date; or use the Date Selector Button, to enter the **Birth Date To** to search for insurees who have the same or earlier birth date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector ([Tab. 1](#)) by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of **today**.
- Clicking on *today* will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



Calendar Selector - Search Panel

- Gender

Select the **Gender**; from the list of genders by clicking on the arrow on the right of the selector, to select insurees of a specific gender.

- Region

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select insurees from a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- District

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select insurees from a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- Municipality

Select the **Municipality**; from the list of wards by clicking on the arrow on the right of the selector to select insurees from a specific municipality. *Note: The list will only be filled with the wards in the selected district above.*

- Village

Select the **Village**; from the list of villages by clicking on the arrow on the right of the selector to select insurees from a specific village. *Note: The list will only be filled with the villages in the selected municipality above.*

- Photo Assigned

Select whether all insurees are searched [**All**] or only insurees with a photo assigned [**Yes**] or only insurees with no photo assigned [**No**].

- Historical

Click on Historical to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.4.23)

INSURANCE NUMBER	LAST NAME	OTHER NAMES	MARITAL STATUS	GENDER	PHONE NUMBER	DATE OF BIRTH	REGION	DISTRICT	VALID FROM	VALID TO
<del>111111100</del>	<del>Beck</del>	<del>John</del>	<del>M</del>	<del>M</del>	<del>-</del>	<del>30/01/1990</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>18/06/2017</del>	<del>18/06/2017</del>
<del>111111100</del>	<del>Beck</del>	<del>John</del>	<del>M</del>	<del>M</del>	<del>-</del>	<del>30/01/1990</del>	<del>TestRegion</del>	<del>TestDistrict1</del>	<del>18/06/2017</del>	<del>18/06/2017</del>
10008	Jackson	Ester	S	M		26/05/1989	TestRegion	TestDistrict1	26/05/2017	

Img. 1.4.23: Historical records - Result Panel

- Search Button

Once the criteria have been entered, use the search button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The result panel displays a list of all Insurees found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.4.24). The leftmost record contains a hyperlink which if clicked, re-directs the user to the *Family Overview Page* of the insuree's family, or the *Insuree Page* if it is a historical record for viewing purposes.

INSURANCE NUMBER	LAST NAME	OTHER NAMES	MARITAL STATUS	GENDER	PHONE NUMBER	DATE OF BIRTH	REGION	DISTRICT	VALID FROM	VALID TO
111111124	Bock	Julia	S	F		29/12/2008	TestRegion	TestDistrict1	10/05/2017	
111111123	Bock	James	S	M		11/06/2014	TestRegion	TestDistrict1	10/05/2017	
111111122	Bock	Elly	M	F	+4358990000	12/06/1984	TestRegion	TestDistrict1	10/05/2017	
111111121	Bock	John	M	M	+420234567567	12/06/1984	TestRegion	TestDistrict1	10/05/2017	
111111125	Bockwurst	Peter	S	M		01/01/1999	TestRegion	TestDistrict1	10/05/2017	
111111140	Fuchs	Elis	S	F		11/06/2014	TestRegion	TestDistrict1	30/05/2017	
111111144	Fuchs	Luciene	S	M		29/12/2008	TestRegion	TestDistrict1	22/05/2017	

Img. 1.4.24: Selected record (blue), hovered records (yellow) - Result Panel

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.4.25)



Img. 1.4.25: Page selector- Result Panel

## 3. Button Panel

The CLAIMS button directs to the Claims Control Pages for the selected insure. The Claims Control Pages is populated by the insurance number of the selected insuree. The CLAIMS button is available only if the user has a role that includes access to Claims/Claim/Search.

The CLAIMS REVIEWED button directs to the Claims Overview Page for the selected insure. The Claims Overview Page is populated by the insurance number of the selected insuree. The CLAIMS REVIEWED button is available only if the user has a role that includes access to Claims/Claim/Review.

The Cancel button re-directs to the Home Page.

## 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a insuree has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Insuree Page

### 1. Data Entry

- Relationship

Select from the list of available relationships of the insuree to the head of family/group.

- Insurance Number

Enter the insurance number for the insuree. Mandatory.

- Last name

Enter the last name (surname) for the insuree. Mandatory, 100 characters maximum.

- Other Names

Enter other names of the insuree. Mandatory, 100 characters maximum.

Img. 1.4.26: *Insuree Page*

- **Birth Date**

Enter the date of birth for the insuree. *Note: You can also use the button next to the birth date field to select a date to be entered.*

- **Gender**

Select from the list of available genders the gender of the insuree. Mandatory.

- **Marital Status**

Select from the list of available options for the marital status of the insuree.

- **Beneficiary Card**

Select from the list of options whether or not the card was issued to the insuree.

- **Current Region**

Select from the list of available regions the region, in which the insuree temporarily stays.

- **Current District**

Select from the list of available districts the district, in which the insuree temporarily stays. *Note: The list will only be filled with the districts belonging to the selected region*

- **Current Municipality**

Select from the list of available municipalities the municipality, in which the insuree temporarily stays. *Note: The list will only be filled with the municipalities belonging to the selected district.*

- **Current Village**

Select from the list of available villages the village, in which the insuree temporarily stays. *Note: The list will only be filled with the villages belonging to the selected municipality.*

- **Current Address Details.**

Enter details of the temporal address of the insuree.

- **Profession**

Select from the list of available professions the profession of the insuree.

- **Education**

Select from the list of available educations the education of the insuree.

- **Phone Number**

Enter the phone number for the insuree.

- **Email**

Enter the e-mail address of the insuree.

- **Identification Type**

Select the type of the identification document of the insuree.

- **Identification No.**

Enter alphanumeric identification of the document of the insuree.

- **Region of FSP**

Select from the list of available regions the region, in which the chosen primary health facility (First Service Point) of the insuree is located.

- **District of FSP**

Select from the list of available districts the district, in which the chosen primary health facility (First Service Point) of the insuree is located. *Note: The list will only be filled with the districts belonging to the selected region.*

- **Level of FSP**

Select the level of the chosen primary health facility (First Service Point) of the insuree.

- **First Service Point**

Select from the list of available health facilities the chosen primary health facility (First Service Point) of the insuree. *Note: The list will only be filled with the health facilities belonging to the selected district which are of the selected level.*

- **Browse**

Browse to get the photo for the insuree related to his/her insurance number.

*Note: There is an automated service in the openIMIS Server which will run on configured time basis repeatedly and assign related photos to insurees without photos if any exist in the openIMIS database. So after a user has input insuree's insurance number and no photo is displayed, there is no need to browse for the photo as that process will be done automatically by the service if the service is configured.*

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Family Overview Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the insuree has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk)



#### 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Family Overview Page*.

### Adding an Insuree

Click on the Green Plus Sign to re-direct to the *Insuree Page*.

When the page opens all entry fields are empty. See the *Insuree Page* for information on the data entry and mandatory fields.

### Editing an Insuree

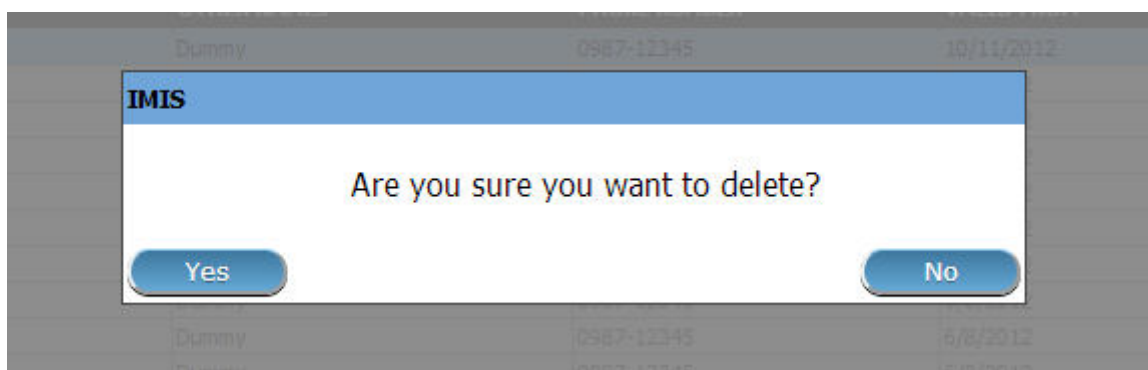
Click on the Yellow Pencil Sign to re-direct to the *Insuree Page*.

The page will open with the current information loaded into the data entry fields. See the *Insuree Page* for information on the data entry and mandatory fields.

### Deleting an Insuree

Click on the Red Cross Sign to delete the currently selected record.

Before deleting a confirmation popup ([Img. 1.4.27](#)) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.4.27: Delete confirmation- Button Panel

When an insuree is deleted, all records retaining to the deleted insuree will still be available by selecting historical records.

## 1.4.4 Policy

### Find Policy

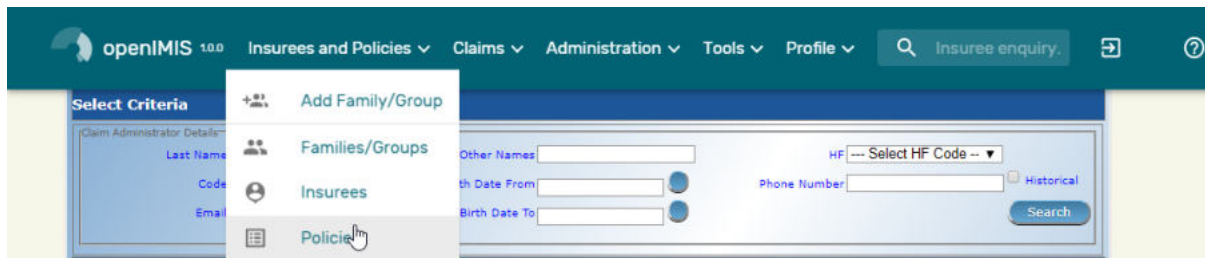
Access to the **Find Policy Page** is restricted to users with the role system roles of Accountant, Clerk or Health Facility Receptionist or with a role including an access to Insurees and Families/Policy/Search.

#### Pre-conditions

Need to enquire on, or edit a policy, and the family/group, insurees and contributions associated.

#### Navigation





Img. 1.4.28: *Navigation Policies*

Find Policy Page can be found under the main menu **Insurees and Policies**, sub menu **Policies**.

Clicking on the sub menu **Policies** re-directs the current user to the find policy page.

Find Policy Page

**Select Criteria**

Policy

Enrolment Date From: [ ] Effective Date From: [ ] Region: TestRegion

Enrolment Date To: [ ] Effective Date To: [ ] District: TestDistrict1

Start Date From: [ ] Expiry Date From: [ ] Type: -- Select Type --

Start Date To: [ ] Expiry Date To: [ ] ☐ Historical

Enrolment Officer: -- Select Enrolment C -- Product: --Select Product-- ☐ Inactive Insurees

Policy Status: -- Select Status -- Balance: [ ]

**31 Policies Found**

ENROL DATE	NAME	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER	POLICY STATUS	POLICY VALUE	BALANCE	TYPE	VALID FROM	VALID TO
14/06/2017	Fuchs Konrad	14/06/2017	14/06/2017	13/06/2018	NF01	Black James	Active	22,000.00	0.00	R	14/06/2017	
17/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01-1	Fox James	Active	8,500.00	0.00	R	29/05/2017	
29/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01	Fox James	Active	8,500.00	0.00	R	29/05/2017	
25/05/2017	Jackson Ester	01/07/2017	01/07/2017	30/06/2018	DX01	Shark John	Idle	5,000.00	-3,000.00	N	26/05/2017	
17/05/2017	Obed Rogers	01/08/2024	01/08/2024	31/07/2025	NX01	Ngaiza Allen	Idle	3,500.00	3,496.00	R	24/05/2017	
17/05/2017	Obed Rogers	01/08/2023	01/08/2023	31/07/2024	NX01	Ngaiza Allen	Idle	3,500.00	3,369.00	R	24/05/2017	
17/05/2017	Obed Rogers	01/08/2022	01/08/2022	31/07/2023	NX01	Ngaiza Allen	Idle	3,500.00	3,478.00	R	24/05/2017	
17/05/2017	Obed Rogers	01/08/2021	01/08/2021	31/07/2022	NX01	Ngaiza Allen	Idle	3,500.00	3,369.00	R	24/05/2017	
17/05/2017	Obed Rogers	01/08/2020	01/08/2020	31/07/2021	NX01	Ngaiza Allen	Idle	3,500.00	3,423.00	R	24/05/2017	
17/05/2017	Obed Rogers	01/08/2019	01/08/2019	31/07/2020	NX01	Ngaiza Allen	Idle	3,500.00	1,500.00	R	24/05/2017	
17/05/2017	Obed Rogers	01/08/2018	01/08/2018	31/07/2019	NX01	Ngaiza Allen	Idle	3,500.00	3,445.00	R	17/05/2017	
17/05/2017	Ngaiza Lamerck	08/05/2017	17/05/2017	16/05/2018	RF01	Shark John	Idle	12,000.00	11,000.00	N	24/05/2017	
15/05/2017	Ngaiza Lamerck	01/05/2017	15/05/2017	14/05/2018	DF01	Fox James	Idle	36,000.00	-54,099.00	N	24/05/2017	
15/05/2017	Van Hans	01/05/2017	15/05/2017	14/05/2018	DF01	Shark John	Active	28,000.00	0.00	N	26/05/2017	
12/05/2017	Obed Rogers	01/08/2017	01/08/2017	31/07/2018	NX01	Ngaiza Allen	Active	2,200.00	0.00	N	17/05/2017	

Img. 1.4.29: *Find Policy Page*

The **Find Policy Page** is the first step in the process of finding a policy and thereafter accessing the *Family Overview Page* of insurees, policies and contributions. This initial page can be used to search for specific policies or groups of policies based on specific criteria. The panel is divided into four panels (Img. 1.4.29)

#### 1. Search Panel

The Search Panel allows a user to select specific criteria to minimise the search results. In the case of policies the following search options are available which can be used alone or in combination with each other.

- Enrolment Date From

Type in a date; or use the Date Selector Button, to enter the **Enrolment Date From** to search for policies with an **Enrolment Date** equal or later than the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Enrolment Date To**

Type in a date; or use the Date Selector Button, to enter the **Enrolment Date to** to search for policies with an **Enrolment Date** equal or earlier than the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Effective Date From**

Type in a date; or use the Date Selector Button, to enter the **Effective Date From** to search for policies with an **Effective Date** equal or later than the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Effective Date To**

Type in a date; or use the Date Selector Button, to enter the **Effective Date To** to search for policies with an **Effective Date To** equal or earlier than the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Start Date From**

Type in a date; or use the Date Selector Button, to enter the **Start Date From** to search for policies with a **Start Date** equal or later than the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Start Date To**

Type in a date; or use the Date Selector Button, to enter the **Start Date to** to search for policies with a **Start Date** equal or earlier than the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

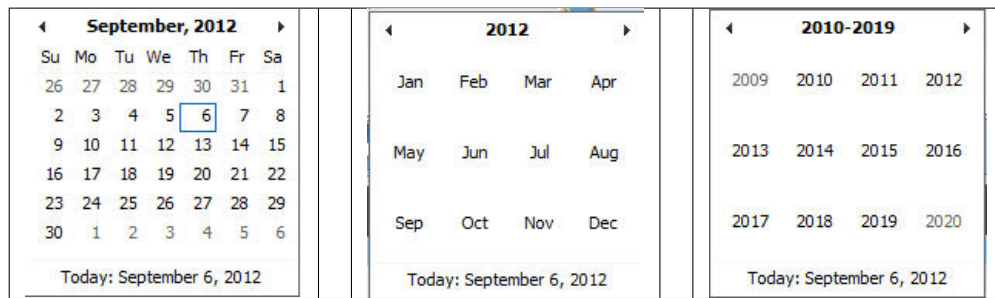
- **Expiry Date From**

Type in a date; or use the Date Selector Button, to enter the **Expiry Date From** to search for policies with an **Expiry Date** equal or later then the specified date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Tab. 1); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of **today**.
- Clicking on **today** will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



*Calendar Selector - Search Panel*

- **Enrolment Officer**

Select the **Enrolment Officer**; from the list of enrolment officers by clicking on the arrow on the right of the selector, to select policies related to a specific enrolment officer.

- **Product**

Select the **Product**; from the list of products by clicking on the arrow on the right of the selector, to select policies for a specific product.

- **Policy Status**

Select the **Policy Status**; from the list of policy statuses by clicking on the arrow on the right of the selector, to select policies for a specific policy status.

A policy can have the following statuses:

- **Idle** (Policy data entered but policy not yet activated)
- **Active** (Policy partially or fully paid and made active)
- **Suspended** (Policy was not fully paid for within the grace period)
- **Expired** (Policy is not active anymore as the insurance period elapsed)

- **Balance**

Types in a positive **Balance** to search for policies with a balance equal or greater than the typed amount. For example if 0 (zero) is entered, all policies with a balance, will be displayed. If 1,000 is entered, then only policies with a balance equal to or greater than 1,000 will be displayed.

The balance is the difference between the policy value and total of contributions paid. For the policy

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select policies from a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select policies for families/groups residing in a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- **Policy Type**

Select whether new policies [New Policy] or renewed policies [Renewal] should be searched for.

- Inactive Insurees

Check the box to select only policies for families/groups with insurees which are non-active (not covered) despite the policy of their family/group is active. The reason may be addition of a new insuree (member) to the family/group with an active policy without adequate payment of additional contributions or because the maximum number of members in the family/group exceeds the maximum number determined by the insurance product of the policy.

- Historical

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.4.30)

ENROL DATE	NAME	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER	POLICY STATUS	POLICY VALUE	BALANCE	TYPE	VALID FROM	VALID TO
<del>14/06/2017</del>	<del>Fuchs Konrad</del>	<del>-</del>	<del>14/06/2017</del>	<del>13/06/2018</del>	<del>NF01</del>	<del>Black James</del>	<del>Idle</del>	<del>22,000.00</del>	<del>22,000.00</del>	<del>R</del>	<del>14/06/2017</del>	<del>14/06/2017</del>
14/06/2017	Fuchs Konrad	14/06/2017	14/06/2017	13/06/2018	NF01	Black James	Active	22,000.00	0.00	R	14/06/2017	
<del>30/05/2017</del>	<del>Fuchs Konrad</del>	<del>30/05/2017</del>	<del>30/05/2017</del>	<del>29/05/2018</del>	<del>NF01</del>	<del>Fox James</del>	<del>Active</del>	<del>24,000.00</del>	<del>24,000.00</del>	<del>N</del>	<del>29/05/2017</del>	<del>29/05/2017</del>
30/05/2017	Fuchs Konrad	30/05/2017	30/05/2017	29/05/2018	NF01	Fox James	Active	24,000.00	24,000.00	N	29/05/2017	29/05/2017
<del>29/05/2017</del>	<del>Fuchs Konrad</del>	<del>-</del>	<del>30/05/2017</del>	<del>29/05/2018</del>	<del>NF01</del>	<del>Fox James</del>	<del>Idle</del>	<del>24,000.00</del>	<del>24,000.00</del>	<del>N</del>	<del>29/05/2017</del>	<del>29/05/2017</del>
29/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01-1	Fox James	Active	4,250.00	4,250.00	R	29/05/2017	29/05/2017
29/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01-1	Fox James	Active	8,500.00	0.00	R	29/05/2017	
<del>29/05/2017</del>	<del>Glenn Gilmour</del>	<del>01/08/2017</del>	<del>01/08/2017</del>	<del>31/07/2018</del>	<del>NX01-1</del>	<del>Fox James</del>	<del>Active</del>	<del>8,500.00</del>	<del>8,500.00</del>	<del>R</del>	<del>29/05/2017</del>	<del>29/05/2017</del>
29/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01-1	Fox James	Active	8,500.00	8,500.00	R	29/05/2017	29/05/2017
<del>29/05/2017</del>	<del>Glenn Gilmour</del>	<del>-</del>	<del>01/08/2017</del>	<del>31/07/2018</del>	<del>NX01-1</del>	<del>Fox James</del>	<del>Idle</del>	<del>8,500.00</del>	<del>8,500.00</del>	<del>R</del>	<del>29/05/2017</del>	<del>29/05/2017</del>

Img. 1.4.30: Historical records - Result Panel

- Search button

Once the criteria have been entered, use the **Search** button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The Result Panel displays a list of all policies found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while hovering over records changes the highlight to yellow (Img. 1.4.31). The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

ENROL DATE	NAME	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER	POLICY STATUS	POLICY VALUE	BALANCE	TYPE	VALID FROM	VALID TO
14/06/2017	Fuchs Konrad	14/06/2017	14/06/2017	13/06/2018	NF01	Black James	Active	22,000.00	0.00	R	14/06/2017	
06/06/2017	Jo Jo	07/06/2017	06/06/2017	05/06/2018	NF01	Black James	Active	17,000.00	-17,000.00	N	12/06/2017	
05/06/2017	Paul Jean	05/06/2017	01/01/2017	31/12/2017	NF01	agent agent	Active	17,000.00	-17,000.00	N	05/06/2017	
29/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01-1	Fox James	Active	8,500.00	0.00	R	29/05/2017	
29/05/2017	Glenn Gilmour	01/08/2017	01/08/2017	31/07/2018	NX01	Fox James	Active	8,500.00	0.00	R	29/05/2017	
25/05/2017	Jackson Ester	25/05/2017	01/07/2017	30/06/2018	DX01	Shark John	Idle	5,000.00	-3,000.00	N	26/05/2017	
22/05/2017	Obed Rogers	22/05/2017	22/05/2017	21/05/2018	DF01	Ngaiza Allen	Idle	28,000.00	24,000.00	N	22/05/2017	

Img. 1.4.31: Selected record (blue), hovered records (yellow) - Result Panel

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.4.32)

First Page	...	11	12	13	14	15	16	17	18	19	20	...	Last Page
------------	-----	----	----	----	----	----	----	----	----	----	----	-----	-----------

Img. 1.4.32: Page selector- Result Panel

## 3. Button Panel

The **Cancel** button re-directs to the [Home Page](#).

## 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a policy has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Policy Page

### 1. Data Entry

The screenshot shows the 'Policy Page' interface. It has a light blue header and a white body. The 'Family/Group Details' section is at the top, with fields for Insurance Number (111111161), Last Name (Pick), Other Names (James), Poverty Status (Yes), Region (TestRegion), District (TestDistrict2), Municipality (TestMunicipality21), Village (TestVillage211), Confirmation Type (Municipality), Confirmation No., and Permanent Address Details. The 'Policy Details' section is below, with fields for Enrolment Date (with a calendar icon), Product (dropdown menu), Effective Date, Start Date, Expiry Date, Enrolment Officer (dropdown menu), Policy Value, Contribution Paid, Balance, Deductible, and Remunerated Health Care. There are also buttons for 'Save' and 'Cancel' at the bottom.

Img. 1.4.33: Policy Page

- **Enrolment Date**

Enter the enrolment date for the policy. Mandatory. *Note: You can also use the button next to the enrolment date field to select a date to be entered.*

- **Product**

Select from the list of available products the product of the policy. Mandatory.

- **Effective Date**

The effective date for the policy is calculated automatically later on. The effective date is the maximum of the start date and the date when the last contribution was paid or when the user enforced activation of the policy.

- **Start Date**

The start date for the policy is calculated automatically. Either it is the enrolment date plus the administration period of the insurance product associated with the policy for free enrolment (without cycles) or it is a cycle start date determined according to enrolment date and the administration period for enrolment in fixed cycles. The start date may be modified by the user.

- **Expiry Date**



The expiry date for the policy is calculated automatically. When entering a new policy, the expiry date is the start date plus the insurance period of the insurance product associated with the policy for free enrolment or the cycle start date plus the insurance period for enrolment in fixed cycles.

- **Enrolment Officer**

Select from the list of available enrolment officers the enrolment officer related to the policy.  
Mandatory

## 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. The user will be re-directed back to the *Family Overview Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the policy has been saved will appear on the Information Panel.

## 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk).

## 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the *Family Overview Page*.

## Adding a Policy

Click on the **Green Plus Sign** to re-direct to the *Policy Page*.

When the page opens all entry fields are empty. See the *Policy Page* for information on the data entry and mandatory fields.

## Editing a Policy

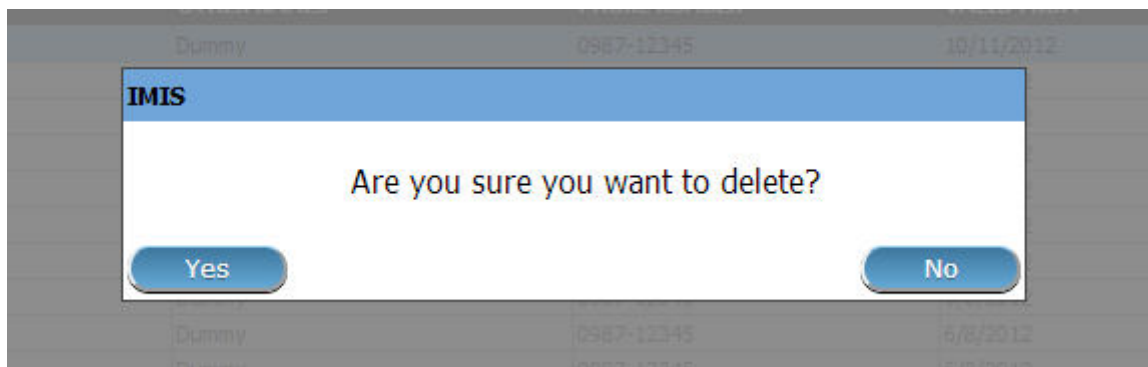
Click on the **Yellow Pencil Sign** to re-direct to the *Policy Page*.

The page will open with the current information loaded into the data entry fields. See the *Policy Page* for information on the data entry and mandatory fields.

## Deleting a Policy

Click on the **Red Cross Sign** to delete the currently selected policy.

Before deleting of a policy, all contributions of the policy should be deleted. Before deleting a confirmation popup ([Img. 1.4.34](#)) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.4.34: Delete confirmation- Button Panel

When a policy is deleted, all records retaining to the deleted policy will still be available by selecting historical records.

### 1.4.5 Contribution

#### Find Contribution

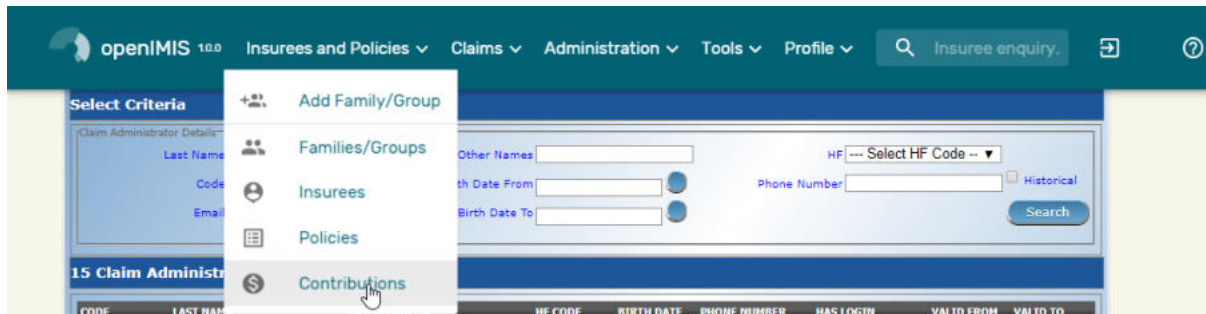
Access to the Find Contribution Page is restricted to users with the system roles of Accountant or Clerk or with a role including an access to Insurees and Families/Contribution/Search.

#### Pre-conditions

Need to enquire on, or edit a contribution, or the family/group, insurees and policies associated.

#### Navigation

Find Contribution can be found under the main menu **Insurees and Policies**, sub menu **Contributions**



Img. 1.4.35: *Navigation Contributions*

Clicking on the sub menu **Contributions** re-directs the current user to the *Find Contribution Page*.

#### Find Contribution Page

The **Find Contribution Page** is the first step in the process of finding a contribution and thereafter accessing the *Family Overview Page* of insurees, policies and contributions. This initial page can be used to search for specific contributions or groups of contributions based on specific criteria. The page is divided into four panels (Img. 1.4.36).

##### 1. Search Panel

The Search Panel allows a user to select specific criteria to minimise the search results. In the case of contributions the following search options are available which can be used alone or in combination with each other.

- **Payer**

Select the **Payer**; from the list of payers by clicking on the arrow on the right of the selector, to select contributions related to a specific payer.

- **Payment Type**

Select the **Payment Type**; from the list of types by clicking on the arrow on the right of the selector, to select contributions related to a specific payment type.

- **Payment Date From**

Type in a date; or use the Date Selector Button, to enter the **Payment Date From** to search for contributions with a **Payment Date** equal or later than the specified

**Select Criteria**

Contribution

**A** Payer  Payment Date From  Region  --Select Region--

Payment Type  -- Payment Type -- Payment Date To  District  ☐ Historical

Receipt No.  Contribution Paid

**43 Contributions Found**

PAYMENT DATE	CONTRIBUTION PAID	PAYER	PAYMENT TYPE	RECEIPT NO.	VALID FROM	VALID TO
12/06/2017	22,000.00		Cash	rcx1	14/06/2017	
31/05/2017	27,000.00	Provincial office Region	Mobile Phone	rcd1	31/05/2017	
29/05/2017	8,500.00		Cash	rcx1	29/05/2017	
29/05/2017	8,500.00		Cash	rcx10	29/05/2017	
26/05/2017	28,000.00	PORALG	Cash	Tddb	26/05/2017	
26/05/2017	5,000.00		Bank Transfer	Fdb	26/05/2017	
25/05/2017	8,000.00	PORALG	Bank Transfer	ncwu67	26/05/2017	
<b>B</b> 24/05/2017	2,000.00	PORALG	Cash	fff	24/05/2017	
24/05/2017	1,000.00	PORALG	Bank Transfer	dd	24/05/2017	
24/05/2017	14,000.00		Bank Transfer	rww	24/05/2017	
23/05/2017	90,099.00	Provincial office Region	Bank Transfer	ff	24/05/2017	
22/05/2017	29,000.00		Mobile Phone	rc3	22/05/2017	
21/05/2017	12,000.00		Cash	rc1	22/05/2017	
17/05/2017	55.00	PORALG	Cash	55	17/05/2017	
17/05/2017	2,000.00	PORALG	Cash	6781	24/05/2017	

**C**

**D**

Img. 1.4.36: Image - 108 Find Contribution Page

date. *Note.* To clear the date entry box; use the mouse to highlight the full date and then press the space key.

- **Payment Date To**

Type in a date; or use the Date Selector Button, to enter the **Payment Date To** to search for contributions with a **Payment Date** equal or earlier than the specified date. *Note.* To clear the date entry box; use the mouse to highlight the full date and then press the space key.

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Tab. 1); by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of **today**.
- Clicking on *today* will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



Calendar Selector - Search Panel

- **Contribution Category**

Select the **Contribution Category** that match with the type of contribution paid, by default there is *Contribution and Others* and *photo fee*. this enable to add fees that won't be counted as contribution payment

- **Contribution Paid**

Type in the **Contribution Paid** to search for contributions with the paid amount, greater or equal to the typed amount.

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select contributions for policies from a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select contributions paid for policies from a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- **Historical**

Click on **Historical** to see historical records matching the selected criteria. Historical records are displayed in the result with a line through the middle of the text (strikethrough) to clearly define them from current records (Img. 1.4.37).

PAYMENT DATE	CONTRIBUTION PAID	PAYER	PAYMENT TYPE	RECEIPT NO.	VALID FROM	VALID TO
10/05/2017	5,000.00		Bank Transfer	r7	10/05/2017	
09/05/2017	12,000.00		Cash	r1	09/05/2017	
09/05/2017	10,000.00		Bank Transfer	r2	09/05/2017	
<del>01/05/2017</del>	<del>24,000.00</del>	-	<del>Cash</del>	<del>rx05</del>	<del>29/05/2017</del>	<del>29/05/2017</del>
<del>01/05/2017</del>	<del>24,000.00</del>	-	<del>Cash</del>	<del>rx05</del>	<del>29/05/2017</del>	<del>29/05/2017</del>
<del>23/06/2016</del>	<del>12,500.00</del>	<del>Provincial office Region</del>	<del>Bank Transfer</del>	<del>rx01</del>	<del>17/05/2017</del>	<del>17/05/2017</del>
<del>23/06/2016</del>	<del>12,500.00</del>	<del>Provincial office Region</del>	<del>Bank Transfer</del>	<del>rx01</del>	<del>17/05/2017</del>	<del>17/05/2017</del>
22/06/2016	12,500.00		Cash	rt1	20/05/2017	
<del>15/06/2016</del>	<del>12,500.00</del>	-	<del>Mobile Phone</del>	<del>rx2</del>	<del>20/05/2017</del>	<del>20/05/2017</del>
<del>15/06/2016</del>	<del>12,500.00</del>	-	<del>Mobile Phone</del>	<del>rx2</del>	<del>20/05/2017</del>	<del>20/05/2017</del>
30/05/2016	24,000.00		Cash	rx09	29/05/2017	

Img. 1.4.37: Historical records - Result Panel

- **Search Button**

Once the criteria have been entered, use the **Search** button to filter the records, the results will appear in the Result Panel.

## 2. Result Panel

The result panel displays a list of all contributions found, matching the selected criteria in the search panel. The currently selected record is highlighted with light blue, while

hovering over records changes the highlight to yellow (Img. 1.4.38) The leftmost record contains a hyperlink which if clicked, re-directs the user to the actual record for detailed viewing if it is a historical record or editing if it is the current record.

PAYMENT DATE	CONTRIBUTION PAID	PAYER	PAYMENT TYPE	RECEIPT NO.	VALID FROM	VALID TO
10/05/2017	5,000.00		Bank Transfer	r7	10/05/2017	
09/05/2017	12,000.00		Cash	r1	09/05/2017	
09/05/2017	10,000.00		Bank Transfer	r2	09/05/2017	
22/06/2016	12,500.00		Cash	rt1	20/05/2017	
30/05/2016	24,000.00		Cash	rx09	29/05/2017	
27/05/2016	12,000.00		Bank Transfer	rc2	22/05/2017	

Img. 1.4.38: Image 111 Selected record (blue), hovered records (yellow) - Result Pane

A maximum of 15 records are displayed at one time, further records can be viewed by navigating through the pages using the page selector at the bottom of the result Panel (Img. 1.4.39).



Img. 1.4.39: Page selector- Result Panel

### 3. Button Panel

The **Cancel** button re-directs to the *Home Page*.

### 4. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a contribution has been added, updated or deleted or if there was an error at any time during the process of these actions.

## Contribution Page

### 1. Data Entry

Family/Group Details		
Insurance Number 111111161	Region TestRegion	Confirmation Type Municipality
Last Name Pick	District TestDistrict2	Confirmation No.
Other Names James	Municipality TestMunicipality21	Permanent Address Details
Poverty Status Yes	Village TestVillage211	

Contribution		Policy Details	
Payer -- Select a Payer --		Policy Value	Balance
Contribution Category -- Select Category --		10,500.00	-100.00
Contribution Paid		Contribution Paid	Policy Status
Receipt No.		10,600.00	Active
Payment Date			
Payment Type -- Payment Type --			

Save
Cancel

Img. 1.4.40: Contribution Page

- Payer

Select from the list of available (institutional) payers the payer of the contribution (if the contribution is not paid by the family/group itself).

- **Contribution Paid**

Enter the paid amount for the contribution. Mandatory.

- **Receipt No.**

Enter the receipt identification for the contribution. Receipt identification has to be unique within all policies of the insurance product. Mandatory.

- **Payment Date**

Enter the date of payment for the contribution. Mandatory. *Note: You can also use the button next to the date of payment field to select a date to be entered.*

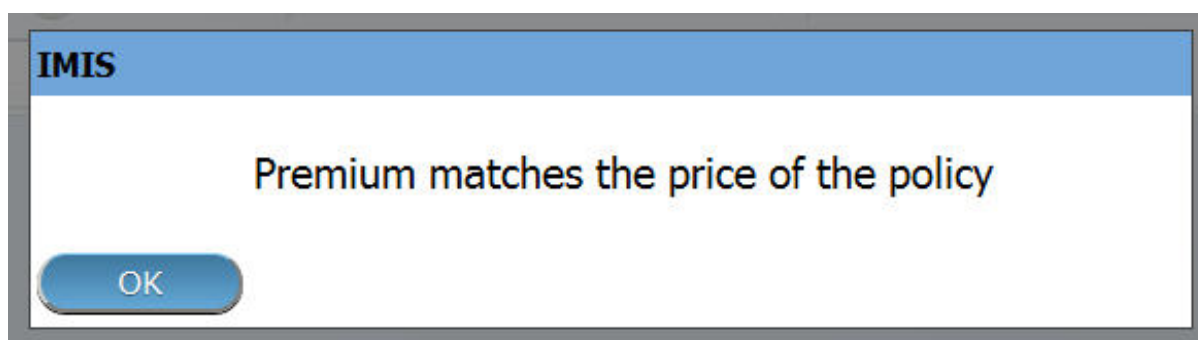
- **Payment Type**

Select from the list of available types of payment the payment type of the contribution. Mandatory.

## 2. Saving

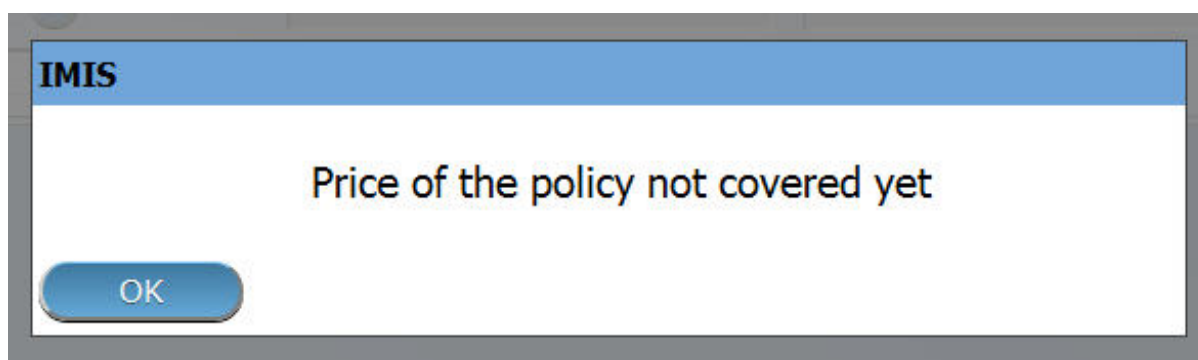
Once all mandatory data is entered, clicking on the **Save** button will save the record. Depending on the contribution paid, the following messages will appear.

- a) If the Contribution paid matches the price of the policy:



Img. 1.4.41: Image 131

- b) If the contribution paid is lower than the price of the policy:

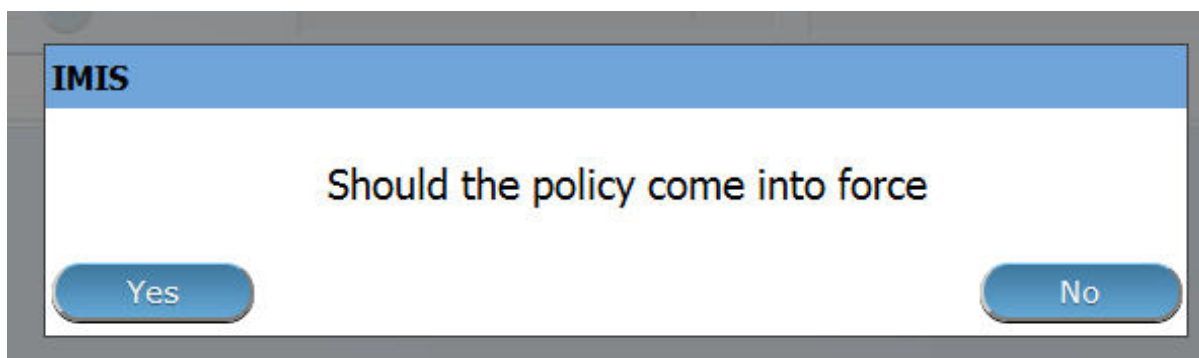


Img. 1.4.42: Image 132

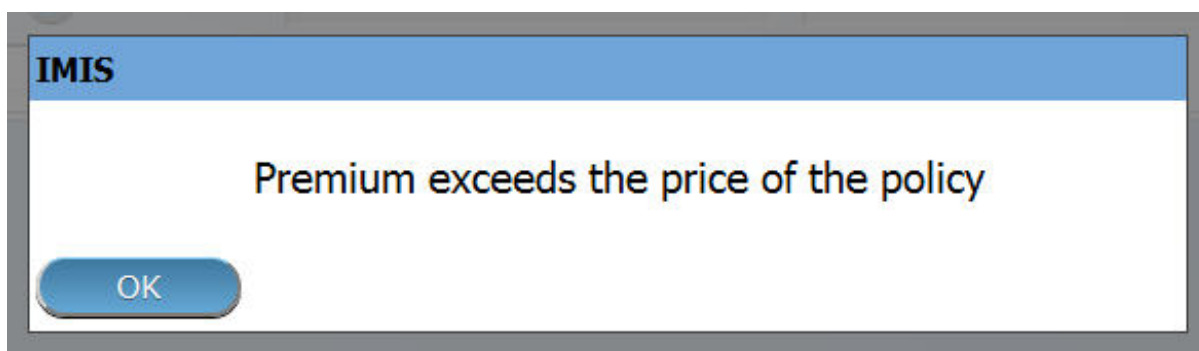
Followed by:

If you choose **Yes**, the policy will be (enforced) set as **Active**. If you choose No, it will remain **Idle**.

- c) If the contribution is higher than the price of the policy:



Img. 1.4.43: Image 133



Img. 1.4.44: Image 134

The user will then be re-directed back to the *Family Overview Page*, with the newly saved record displayed and selected in the result panel. A message confirming that the contribution has been saved will appear on the Information Panel.

### 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk).

### 4. Cancel

By clicking on the **Cancel** button, the user will be re-directed to the [Family Overview Page](#).

## Adding a Contribution

Click on the **Green Plus Sign** to re-direct to the *Contribution Page*.

When the page opens all entry fields are empty. See the *Contribution Page* for information on the data entry and mandatory fields.

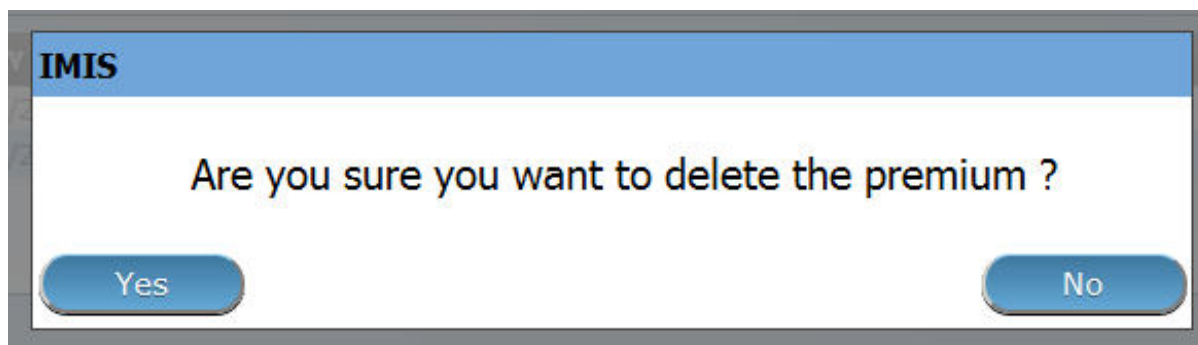
## Editing a Contribution

Click on the **Yellow Pencil Sign** to re-direct to the *Contribution Page*. The *Contribution Page* will open with the current information loaded into the data entry fields. See the *Contribution Page* for information on the data entry and mandatory fields.

## 1.4.6 Deleting a Contribution

Click on the **Red Cross Sign** button to delete the currently selected record.

Before deleting a confirmation popup (Img. 1.4.45) is displayed, which requires the user to confirm if the action should really be carried out?



Img. 1.4.45: Delete confirmation- Button Panel

When a contribution is deleted, all records retaining to the deleted contribution will still be available by selecting historical records.

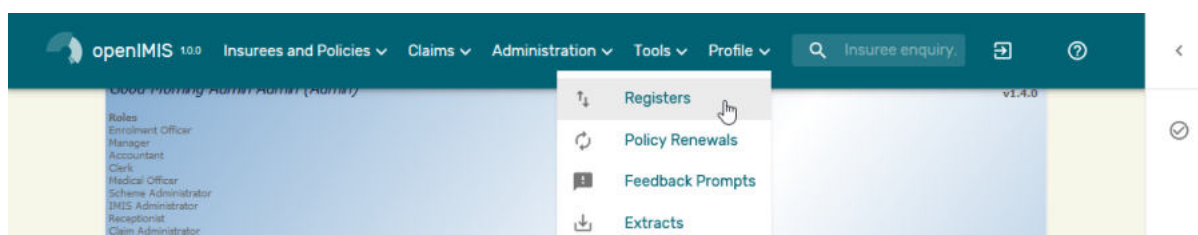
## 1.5 Tools

### 1.5.1 Upload / Download selected registers

Access to uploading/downloading of selected registers is restricted to the users with the the system role of IMIS Administrator ( the register of locations) or with a role including an access to Tools/Registers.

#### Navigation

All functionality for use with the administration of uploading/downloading of selected registers can be found under the main menu **Tools**, sub menu **Registers**.



Img. 1.5.1: Navigation to Registers

Clicking on the sub menu **Registers** re-directs the current user to the *Registers Page*: (Img. 1.5.1)

#### Registers page

The Registers Page is divided into eight sections: (Img. 1.5.2)

##### A. Upload of the list of diagnoses

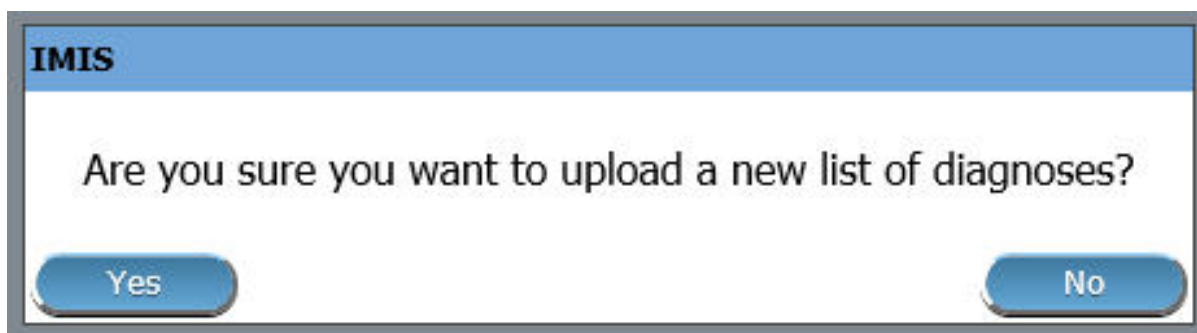
###### • Browse

Select from a file in the XML format serving as a source for uploading of the list of diagnoses. Mandatory.

Img. 1.5.2: *Upload Registers*

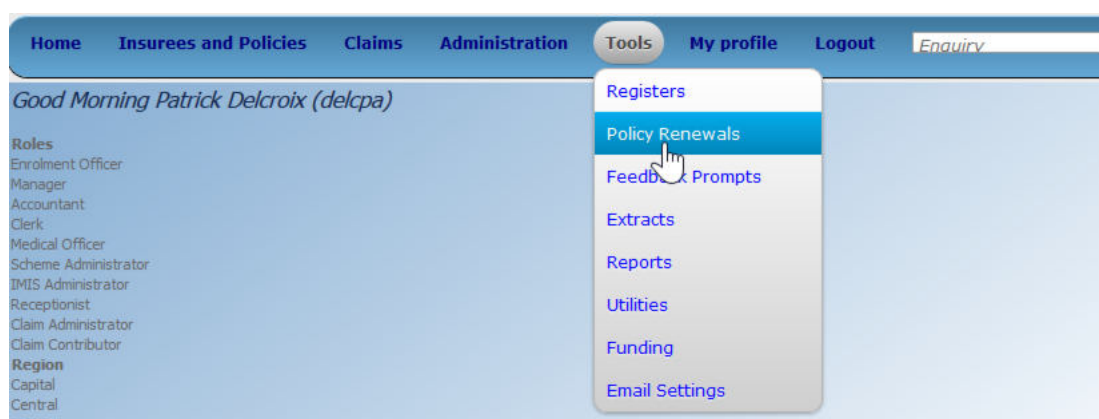
- **Strategy**  
Select a desired strategy for uploading of the list of diagnoses. The following options are available:
- **Insert Only**  
Uploads only diagnoses that are not yet included in the list of diagnoses
- **Update Only**  
Updates only diagnoses that are already included in the list of diagnoses
- **Insert and Update**  
Uploads diagnoses that are not yet included in the list of diagnoses and updates diagnoses that are already included in the list of diagnoses
- **Insert, Update and Delete**  
Uploads diagnoses that are not yet included in the list of diagnoses, updates diagnoses that are already included in the list of diagnoses and deletes diagnose that are not included in the source file
- **Dry Run**  
If checked, only diagnostics is provided without real uploading.
- **Upload**

By clicking on the Upload button, a prompt popup message will appear, require a user to agree. If user agrees the selected file containing diagnoses will be uploaded.



Img. 1.5.3: Upload Diagnoses

A statistics on the number of inserted/updated diagnoses appears:  
(*Statistics on uploaded diagnoses*).



Img. 1.5.4: Statistics on uploaded diagnoses

If there are errors an error protocol appears: (*Error protocol on uploaded diagnoses*)

*DTD definition of the XML file for uploading/downloading of diagnoses:*

```
<!DOCTYPE Diagnoses> [
  <!ELEMENT Diagnoses (Diagnosis)*>
  <!ELEMENT Diagnosis (DiagnosisCode, DiagnosisName)>
  < !ELEMENT DiagnosisCode (#CDATA)>
  < !ELEMENT DiagnosisName (#CDATA)>
]>
```

#### B. Upload of the register of locations

- **Browse**

Select from a file in the XML format serving as a source for uploading of the register of locations. Mandatory.

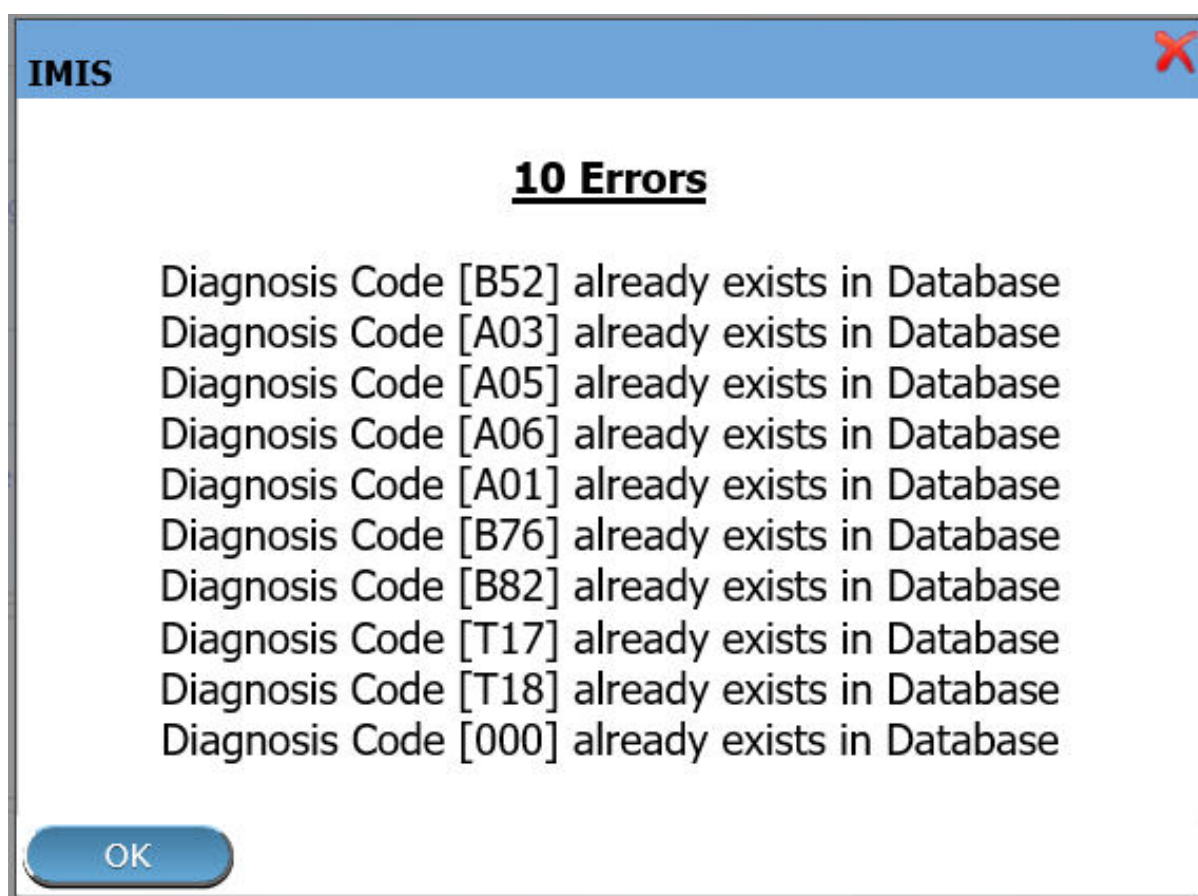
- **Strategy**

Select a desired strategy for uploading of the register of locations. The following options are available:

- **Insert Only**

Uploads only locations that are not yet included in the register of locations





Img. 1.5.5: *Error protocol on uploaded diagnoses*

- Update Only

Updates only locations that are already included in the register of locations

- Insert and Update

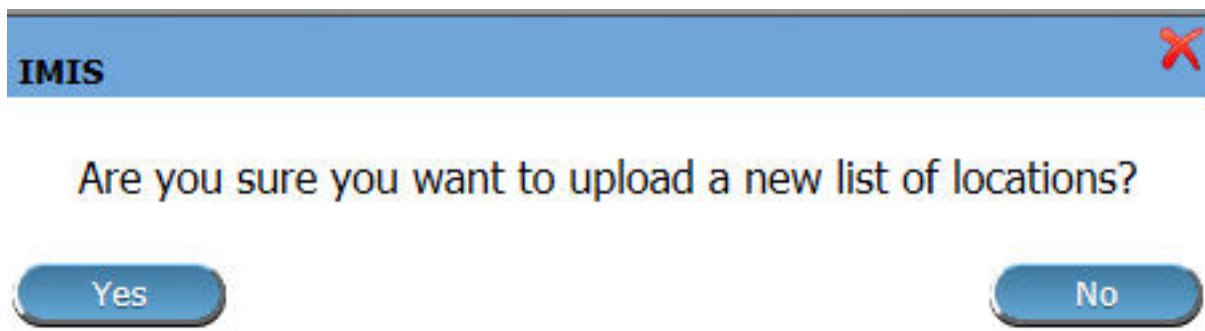
Uploads locations that are not yet included in the register of locations and updates locations that are already included in the register of locations

- Dry Run

If checked only diagnostics is provided without real uploading.

- Upload

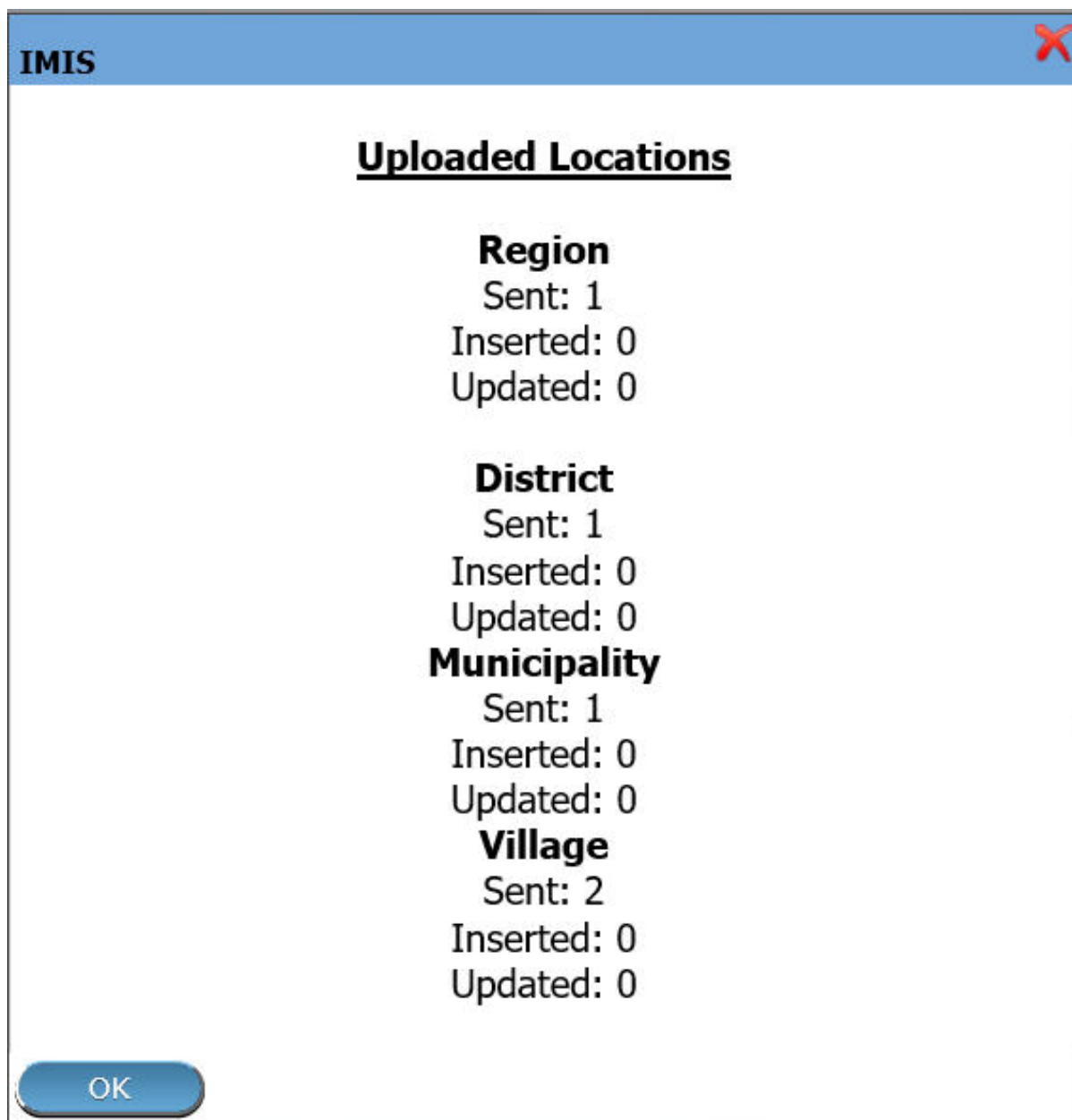
By clicking on the Upload button, a prompt popup message will appear, require a user to agree or disagree (*Upload Locations*). If user agrees the selected file containing locations will be uploaded.



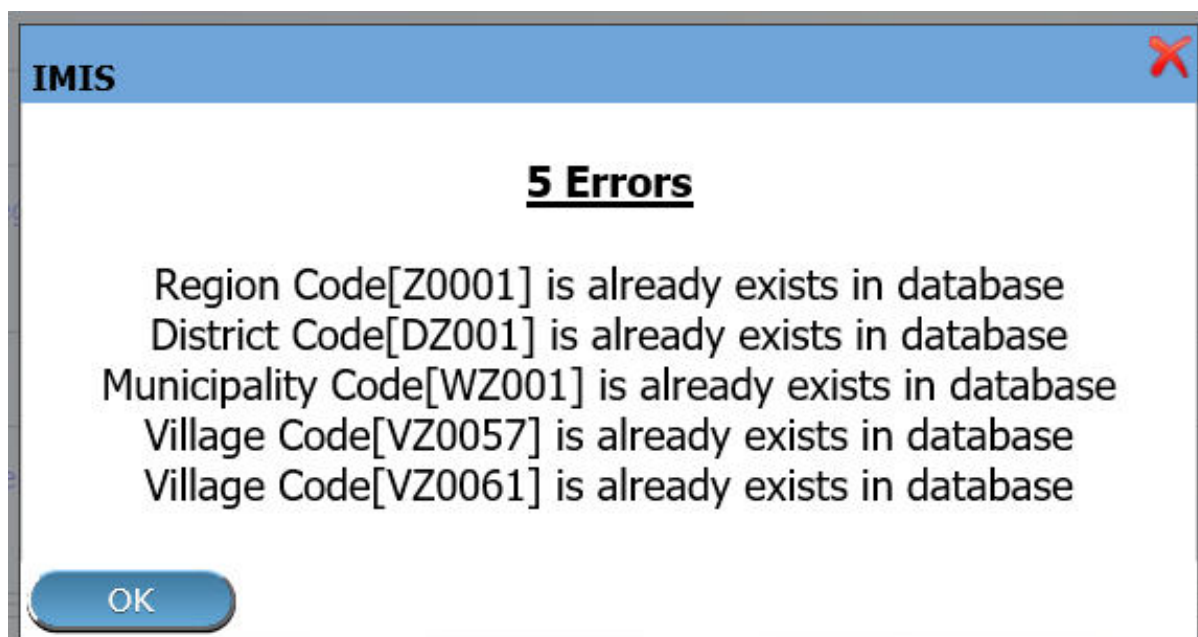
Img. 1.5.6: *Upload Locations*

A statistics on the number of inserted/updated locations appears (*Upload Locations statistics*)

If there are errors an error protocol appears (*Upload Locations error*)



Img. 1.5.7: *Upload Locations statistics*



Img. 1.5.8: Upload Locations error

*DTD definition of the XML file for uploading/downloading of locations:*

```
<!DOCTYPE Locations> [
  <!ELEMENT Locations (Regions, Districts, Municipalities, Villages)>
  <!ELEMENT Regions (Region*)>
  <!ELEMENT Region (RegionCode, RegionName)>
  < !ELEMENT RegionCode (#CDATA)>
  < !ELEMENT RegionName (#CDATA)>
  <!ELEMENT Districts (District*)>
  <!ELEMENT District (RegionCode,DistrictCode, DistrictName)>
  < !ELEMENT RegionCode (#CDATA)>
  < !ELEMENT DistrictCode (#CDATA)>
  < !ELEMENT DistrictName (#CDATA)>
  <!ELEMENT Municipalities (Municipality*)>
  <!ELEMENT Municipality (DistrictCode,MunicipalityCode, Municipality-
  Name)>
  < !ELEMENT DistrictCode (#CDATA)>
  < !ELEMENT MunicipalityCode (#CDATA)>
  < !ELEMENT MunicipalityName (#CDATA)>
  <!ELEMENT Villages (Village*)>
  <!ELEMENT Village (MunicipalityCode,VillageCode, Village-
  Name,MalePopulation ?, FemalePopulation ?, OtherPopulation,Families ?)>
  < !ELEMENT MunicipalityCode (#CDATA)>
  < !ELEMENT VillageCode (#CDATA)>
  < !ELEMENT VillageName (#CDATA)>
  < !ELEMENT MalePopulation (#CDATA)>
  < !ELEMENT FemalePopulation (#CDATA)>
  < !ELEMENT OtherPopulation (#CDATA)>
  < !ELEMENT Families (#CDATA)>
]>
```

C. Upload of the register of health facilities

- Browse

Select from a file in the XML format serving as a source for uploading of the register of health facilities. Mandatory.

- **Strategy**

Select a desired strategy for uploading of the register of health facilities. The following options are available:

- **Insert Only**

Uploads only health facilities that are not yet included in the register of health facilities

- **Update Only**

Updates only health facilities that are already included in the register of health facilities

- **Insert and Update**

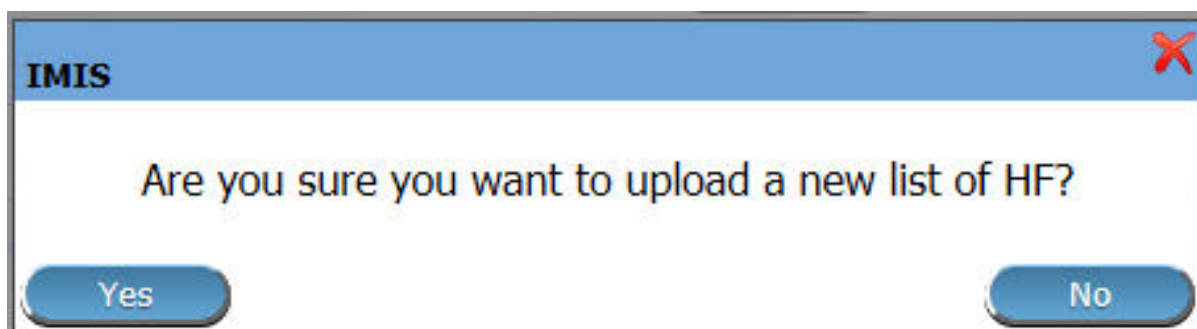
Uploads health facilities that are not yet included in the register of health facilities and updates health facilities that are already included in the register of health facilities

- **Dry Run**

If checked only diagnostics is provided without real uploading.

- **Upload**

By clicking on the Upload button, a prompt popup message will appear, require a user to agree or disagree: (*Upload Health Facilities*) If user agrees the selected file containing locations will be uploaded.



Img. 1.5.9: *Upload Health Facilities*

A statistics on the number of inserted/updated health facilities appears.

If there are errors an error protocol appears.

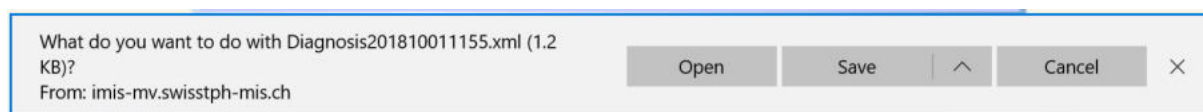
*DTD definition of the XML file for uploading/downloading of health facilities:*

```
<!DOCTYPE HealthFacilities> [
<!ELEMENT HealthFacilities (HealthFacilityDetails,CatchmentsDetails)>
<!ELEMENT HealthFacilityDetails (HealthFacility)*>
<!ELEMENT HealthFacility (LegalForm, Level, Sublevel, Code, Name, Address, DistrictCode, DistrictName, Phone, Fax, Email, CareType, AccountCode, ItemPriceListName, ServicePricelistName)>
<!ELEMENT LegalForm (D| C|G|P)>
<!ELEMENT Level (D|C|H)>
<!ELEMENT SubLevel (I|N|R)>
<!ELEMENT Code (#CDATA)>
<!ELEMENT Name (#CDATA)>
<!ELEMENT Address (#CDATA)>
<!ELEMENT DistrictCode (#CDATA)>
<!ELEMENT DistrictName (#CDATA)>
<!ELEMENT Phone (#CDATA)>
<!ELEMENT Fax (#CDATA)>
<!ELEMENT Email (#CDATA)>
<!ELEMENT CareType (I|N|B)>
<!ELEMENT AccountCode (#CDATA)>
<!ELEMENT ItemPriceListName (#CDATA)>
<!ELEMENT ServicePriceListName (#CDATA)>
<!ELEMENT CatchmentsDetails(Catchment*)>
<!ELEMENT Catchment (HFCode,VillageCode, VillageName, Percentage)>
<!ELEMENT HFCode (#CDATA)>
<!ELEMENT VillageCode (#CDATA)>
<!ELEMENT VillageName (#CDATA)>
<!ELEMENT Percentage (#CDATA)>
]>
```

#### D. Download of the list diagnoses

- **Download**

By clicking on the Download button, a prompt popup message will appear, require a user to specify whether the XML file with downloaded list of diagnoses should be opened or saved or canceled: (*Download Diagnoses*)



Img. 1.5.10: *Download Diagnoses*

#### E. Download of the register of locations

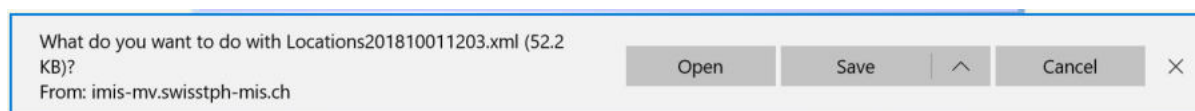
- **Download**

By clicking on the Download button, a prompt popup message will appear, require a user to specify whether the XML file with downloaded register of locations should be opened or saved or canceled (*Download locations*)

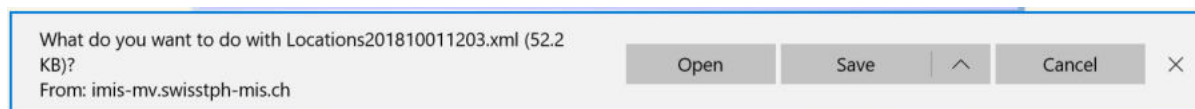
#### F. Download of the register of health facilities

- **Download**

By clicking on the Download button, a prompt popup message will appear, require a user to specify whether the XML file with downloaded canceled (*Download facilities*)



Img. 1.5.11: *Download locations*



Img. 1.5.12: *Download facilities*

#### G. Buttons

- **Cancel**

By clicking on **Cancel** button, user will be re-directed to the Home page.

#### H. Information Panel

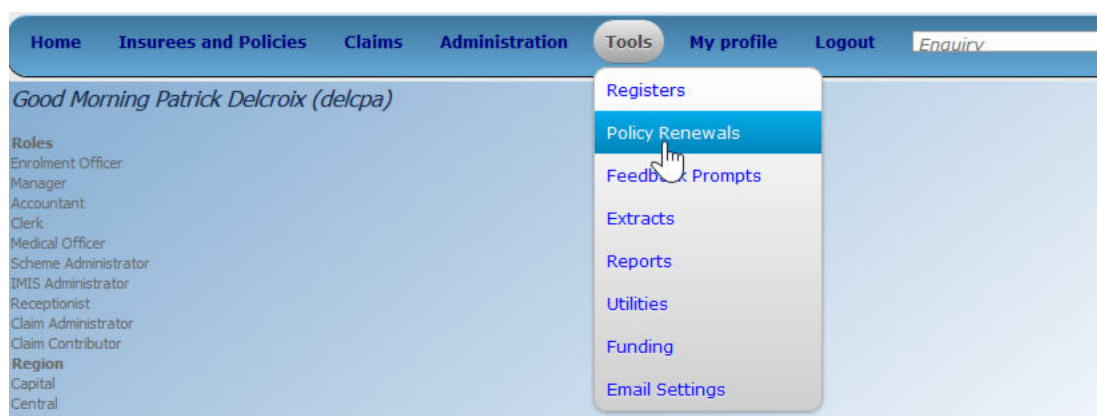
The Information Panel is used to display messages back to the user.

## 1.5.2 Policy Renewals

Access to management of policy renewals is restricted to the users with the role of Clerk.

### Navigation

All functionality for use with the administration of policy renewals can be found under the main menu **Tools**, sub menu **Policy Renewals**



Img. 1.5.13: *Navigation Policy Renewals*

Clicking on the sub menu **Policy Renewals** re=directs the current user to the *Policy Renewal Page*.

### Policy Renewal Page

By having access to this page, it is possible preview the report on policy renewals, preview the journal on policy renewals and update the status of a policy. The journal will contain information on actual prompts being generated by the system. These prompt could already have been sent to the mobile phones of enrolment



Img. 1.5.14: Policy Renewal Page

officers. The report on policy renewals will contain information on the expiration of policies for any given period. The page is divided into two panels (Img. 1.5.14).

#### 1. Select Criteria Panel

The Select Criteria Panel or the filter panel allows a user to select specific criteria to minimise the report on policy renewals.

Two tasks are carried out by this form. 1) Preview the report on policy renewal and 2) Preview the journal on policy renewal. Depending on the selected option, filter will be changed accordingly.

If Preview option is selected then a user has the following filters.

- **Policy Status**

Select the policy status from the drop down list by clicking on the right arrow. By selecting any of the options a user can filter the report on particular status of the policy. This filter is not mandatory. User can leave it blank to preview the report on any status.

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select policies from a specific region. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- **District**

Select the **district**; from the list of districts by clicking on the arrow on the right of the selector to select policies from a specific district. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- **Municipality**

Select the **Municipality**; from the list of municipalities by clicking on the arrow on the right of the selector to preview report from a specific district. *Note: The list will only be filled with the municipalities that belong to the selected district. If this is only one then the municipality will be automatically selected.*

- **Village**

Select the **village**; from the list of villages by clicking on the arrow on the right of the selector to preview report from a specific village. *Note: The list will only be filled with the villages that belong to the selected municipality.*

- **Enrolment Officer**

Select the **Enrolment Officer**; from the list of enrolment officers by clicking on the arrow on the right of the selector to preview the report for the specific officer. *Note: The list will only be filled with the enrolment officers belonging to the districts assigned to the current logged in user. If this is only one then the enrolment officer will be automatically selected.*

- **Date From**

By clicking on the button next to the **Date From** data field a calendar will pop up. Click on his desired date and the textbox will be filled with the selected date. This is a mandatory field. Only the policies for renewal date greater than or equal to the **Date From** will be previewed.

- **Date To**

By clicking on the button next to the **Date To** data field a calendar will pop up. Click on his desired date and the textbox will be filled with the selected date. This is a mandatory field. Only the policies for renewal date less than or equal to the **Date To** will be previewed.

When previewing the journal; the **Policy Status** filter will be replaced with **SMS Status** and there will be one more additional filter, **Journal On**.

- **SMS Status**

Select the **SMS status** from the drop down list by clicking on the right arrow. By selecting any of the options the user can filter the journal on a particular **SMS status**. This filter is not mandatory. By leaving it blank all journals will be displayed.

- **Journal On**

Select the **journal On** from the drop down *list* by clicking on the right arrow, to filter the journal either on prompt or on expiry of the prompt.

## 2. Button Panel

**Cancel:** Re-directs to the [Home Page](#)

**Preview:** Click on the preview button to display the report based on the filters.

**Update:** Click on this button to manually update the status of the policy on the current day. Although this task is carried out by the **IMIS Policy Renewal Service** running on the server at specific intervals of time, this button enables the task to be run manually.

## 3. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur once a user has updated the policy status or if there was an error at any time during the process of these actions.

## Preview Report on Renewals

After selecting specific criteria; preview the report ([Img. 1.5.15](#)) by clicking on the preview button.

Go back to selector.

of 1 Find | Next

### Policy Status Overview

Date From 01/01/2016 To 18/12/2016, District: Dodoma, Policy Status: Expired

Dodoma						
Agent: -						
Chihanga						
Nzasa						
Insurance Number	Last Name	Other Names	Code	Name	Renewal Date	Product Value
005647526	Tura	Sofia	SXB001	Basic fixed enrolment nationwide	01/11/2016	29,000
Ward (Nzasa)						29,000
VDC/Municipality (Chihanga)						29,000
Chahwa						
Chahwa mtaa						
Insurance Number	Last Name	Other Names	Code	Name	Renewal Date	Product Value
777777775	Myer	John	DFC002	Ceilings free enrolment Dodoma	15/12/2016	19,000
Ward (Chahwa mtaa)						19,000
VDC/Municipality (Chahwa)						19,000
Enrolment Assistant (I)						48,000
District (Dodoma)						48,000
Total Value:						48,000

Policy Status Overview - Printed on: 12/18/2016 11:03:14 AM

Img. 1.5.15: *Preview Report on Renewals*

## Preview Journal on Renewals

Just like preview of the policy renewals the journal report can also be previewed. The difference between the Policy Renewal report and the Journal is; one forecasts the renewal while the other gives a report on the status of the renewal. Below is an example of a Journal Report.

## 1.5.3 Feedback Prompts

Access to administration of feedback prompts is restricted to the users with the role system role of Medical Officer or with a role including an access to Claims/Claim/Feedback.

### Navigation

All functionality for use with the administration of feedback prompt can be found under the main menu **Tools**, sub menu **Feedback Prompts**

Clicking on the sub menu **Feedback Prompts** re-directs the current user to the Feedback Prompt Page (Img. 1.5.17).

The Feedback Prompt Page is divided into three panels (Img. 1.5.18).

#### 1. Select Criteria Panel

The Select Criteria Panel or the filter panel allows a user to select specific criteria for feedback.

- **SMS Status**

Select **SMS Status** from the list

Go back to selector.

Policy Status Overview

Date From 01/01/2017 To 31/07/2017, Region: TestRegion, District: TestDistrict1, Municipality: TestMunicipality11, Enrolment Officers: E001 - Fox James, Policy Status: Active

TestDistrict1

Enrolment Officers : E001 - Fox James

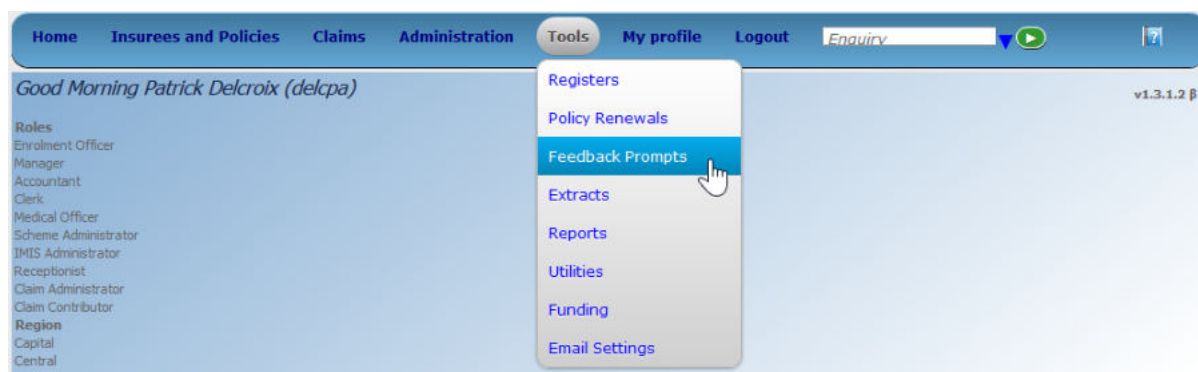
TestMunicipality11

TestVillage111

Insurance Number	Last Name	Other Names	Code	Name	Renewal Date	Product Value
111111191	Garbeight	James	RF01	Regional free	31/07/2017	10,00
					Village (TestVillage111)	10,00
					Municipality (TestMunicipality11)	10,00
					Enrolment Officers (E001)	10,00
					(TestDistrict1)	10,00
					Total Value:	10,00

Policy Status Overview - Printed on: 7/30/2017 7:42:10 PM

Img. 1.5.16: Preview Journal on Renewals



Img. 1.5.17: Navigation Feedback Prompts

Select Criteria

**A**

SMS Status -- Select Status --

Region TestRegion

District -- Select a District --

Municipality

Village

Enrolment Officer

Date From

Date To

Send SMS

**B** Review

**C**

Cancel

Img. 1.5.18: Feedback Prompts Page

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select a specific region for feedbacks. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- **District**

Select the **district** from the list of districts by clicking on the arrow on the right of the selector to select district for feedbacks. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the District will be automatically selected.*

- **Municipality**

Select the **Municipality** from the list of municipalities you wish to prompt for feedbacks. *Note: The list will only be filled with the municipalities that belong to the selected district. If this is only one then the municipality will be automatically selected.*

- **Village**

Select the **village**; from the list of villages you wish to prompt for feedbacks. *Note: The list will only be filled with the villages that belong to the selected municipality.*

- **Enrolment Officer**

Select the **Enrolment Officer**; from the list of enrolment officers by clicking on the arrow on the right of the selector to preview the report for the specific officer. *Note: The list will only be filled with the enrolment officers belonging to the districts assigned to the current logged in user. If this is only one then the enrolment officer will be automatically selected.*

- **Start Date**

Type in a date; or use the Date Selector Button, to enter the **Start Date** for feedbacks. *Mandatory. \*Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **End Date**

Type in a date; or use the Date Selector Button, to enter the **End Date** for feedbacks. *Mandatory. Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Send SMS**

By Clicking **Send SMS** button, user actually sends an SMS. When an SMS is sent successfully as message will be given. If failed to be sent, a failure message will appear.

## 2. Buttons Panel

- **Preview**

By clicking on the **Preview** button, a report (journal) of feedbacks prompted will get generated and displayed ([Img. 1.5.19](#)).

- **Cancel**

By clicking on **Cancel** button, user will be re-directed to [Home Page](#).

## 3. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur if there was an error at any time during the processing of the reports.

Date	Claim ID	Claim No.	HF Name	Insurance Number	Last Name	Other Names	From	To	SMS
30/07/2017	69	xx2	HFX01-Regional hospital X	555444111	Gonzalez	Quido	03/07/2017	03/07/2017	Idle
31/07/2017	70	xx3	HFX01-Regional hospital X	555444112	Gonzalez	Luisa	03/07/2017	03/07/2017	Idle

Img. 1.5.19: *Feedback Prompt Journal*

## 1.5.4 IMIS Extracts

Access to the openIMIS Extracts page is restricted to users with the system role of Scheme Administrator (IMIS Central online) or HF Administrator (IMIS offline installations) or with a role including an access to Tools/Extracts. This page will contain all functionality for data synchronization between IMIS Central and IMIS offline installations as well as the generation of extract files for the mobile phones (Android). Depending on the type of installation, the interface will enable and disable certain functions.

### Pre-conditions

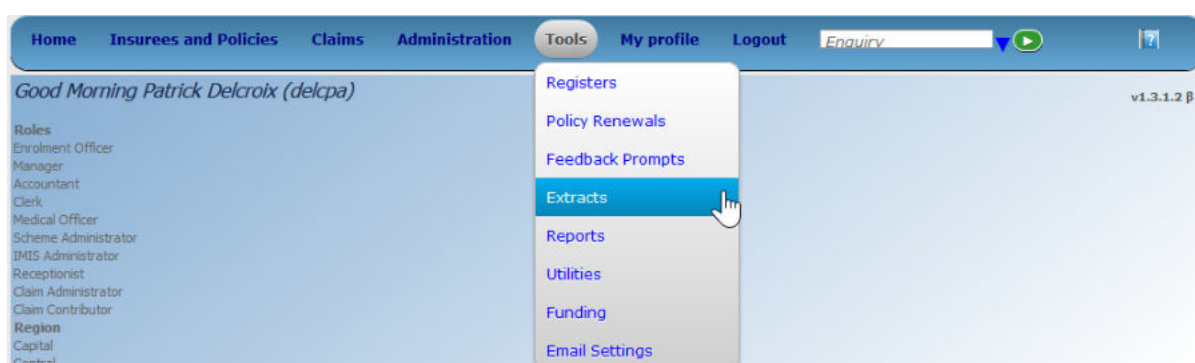
The extract functionality is covering extracts for the mobile phone applications and the openIMIS 'offline' installations. Offline extracts are only to be generated in case a district has so called 'off-line' installations in areas where no Internet connectivity is available.

Extracts are to be downloaded to the local PC that is initiating the creation of the extract.

Standard procedures should be formulated to stipulate the time interval between Extract creations and the management of transporting and installing/transferring these extracts into the target environment: mobile phones or offline openIMIS clients.

### Navigation

All functionality related to openIMIS extracts can be found under the main menu **Tools**, sub menu **IMIS Extracts**



Img. 1.5.20: *Navigation openIMIS Extracts*

Clicking on the sub menu **IMIS Extracts** re-directs the current user to the **IMIS Extracts** Page.

This page opens in two different modes depending on the type of openIMIS installation: openIMIS Central (live server) or openIMIS offline (installed on local network in a health facility or an office of the scheme administration).

### IMIS Extracts (online mode)

Img. 1.5.21: openIMIS Extracts

The Extracts Page is divided into eight sections (*Image 6.23*).

#### A - Download Master Data section

The Master Data section is used for generation of the data needed for off-line operation of IMIS (Policies) application run on Android platforms. The following data files can be downloaded:

- Master data for running IMIS (Policies) application (**Download Master Data**)
- Prompts for renewal of policies (**Download Renewals**)
- Prompts for acquiring of feedbacks (**Download Feedbacks**)
- **Enrolment Officers Code:** Enter the code of an enrolment officer for whom the master data and prompts should be generated.

#### B - Create Phone Extract section

The Phone extract panel is used for the generation of so called SQLite database files for the mobile phone applications. Each district will have its own phone extract file that needs to be distributed to the mobile phones within the district. To generate a phone extract file, the operator has to select a region and a district from the list of available districts. In case the user is having access to its own district only, the district will be automatically selected and shown on the display.



By clicking the **Create** button in panel the section, a phone extract will be created. This process might take a while. As long as the hour glass (as a cursor) is shown, openIMIS is still processing the file. The file size depends on the amount of photographs included in the extract. The file size could range into hundreds of MBs. To alleviate this problem two options are available:

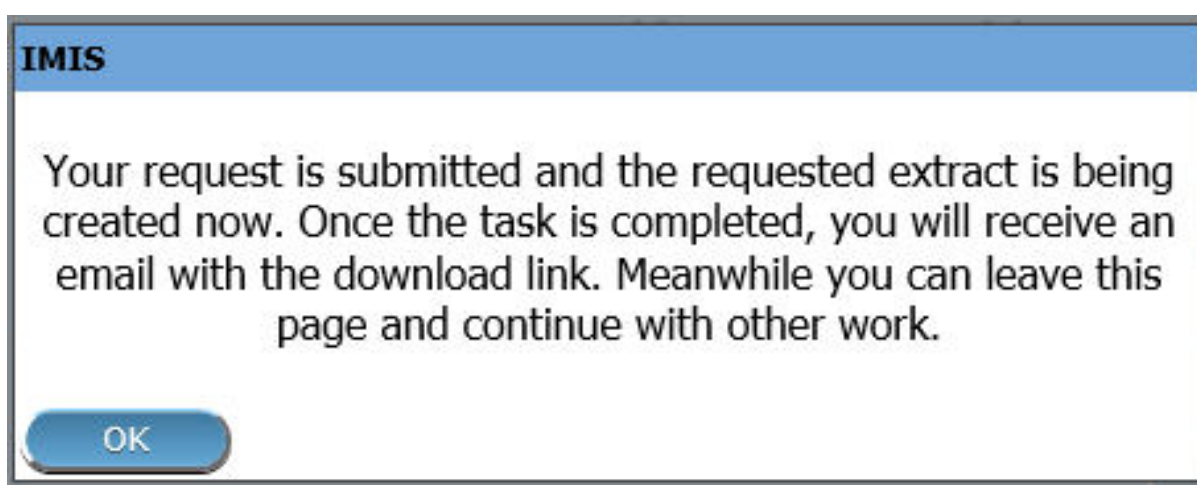
- **With Insurees**

Checking this box means that a complete phone extract (including photos) will be generated. Leaving it unchecked a shortened phone extract without photos will be generated.

- **In background**

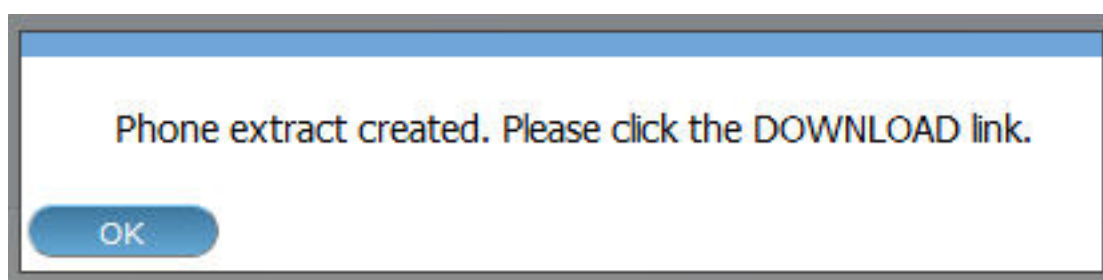
Checking this box means that the phone extract will be created in background and the user will be notified by e-mail (provided his/her e-mail is entered in the register of users).

In case the extract is created in the background, the following dialog box appears:



Img. 1.5.22: Image 179

If the extract is not created in background the user is notified about successful creation by the following message as shown below.



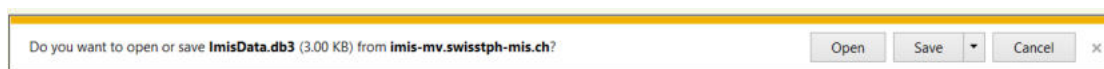
Img. 1.5.23: Image 180

The extract will be downloaded to your local computer by clicking the Download link that will appear after the creation of the extract, as shown below.



Img. 1.5.24: Image 181

The extract file is called **IMISDATA.DB3** and needs first to be copied (downloaded) to the local machine. After clicking the **Download** button, the operator is able to select the destination folder (locally) for the file to download as shown below.



Img. 1.5.25: Image 182

The extract is now ready to be transferred/copied to the mobile phones. This process is performed manually by connecting the mobile phone to the computer with the provided USB cable. The user needs to copy, manually, the file from the local machine into the 'IMIS' Folder on the mobile phone.

### C - Offline Extract section

The offline extract section is used to generate the openIMIS 'offline' extract files for the health facilities or offices of the scheme administration that run openIMIS offline. To generate an offline extract file, the operator has to select a region and a district from the list of available districts. In case the user is having access to its own district only, the district will be automatically selected and shown on the display. When an operator belongs to one specific district, the district box is already selected with the district of the user. To create a new extract, the operator needs to click the **Create** button.

Three types of extracts could be generated:

- Differential Extract (Download D)

Differential extracts will only contain the differences in data compared with the previous extract. The first differential extract (sequence 000001) will contain all data as it will be the first extract. Thereafter, this type of the extract, will only contain any differences after the previous extract. This will result in smaller files sent to the health facilities in off-line mode. When we click the create button, the differential extract is always generated and will be assigned the next sequence number. A separate Photo extract will be created containing only photographs linked to changes compared with the previous extract. Differential extracts with insuree and policy data are only generated in case the **With Insuree** checkbox is checked as shown below.



Img. 1.5.26: Image 183

- Full extract (Download F)

The Full extract will always contain all information in the database. These extracts are only generated in case the **Full extract** and the **With Insuree** checkbox are checked as shown below.



Img. 1.5.27: Image 184

By clicking the **Create** button, in case of **Full extract** is checked, two extracts will be generated, one differential extract and one full extract. Both extracts will have the same sequence number. This implies that full extracts are not always needed/generated. A separate photo extract will be created containing all photographs.

- Empty Extract (Download E)

Empty extracts will only contain the data from registers and no data on insureds and their policies/photos. If a full set of register data should be included in the extract, the checkbox **Full extract** has to be checked as shown below.



Img. 1.5.28: Image 185

After clicking the **Create** button, the system will create the extract file and will on completion display the following message:

The message is only shown to provide some details on how much information is exported to the extract file.

Depending on the **Full extract** option, we will be re-directed to the extract page and will see the newly generated extract sequence in the list or will get a new message as shown below:

After clicking OK the statistics of the full extract will be shown:

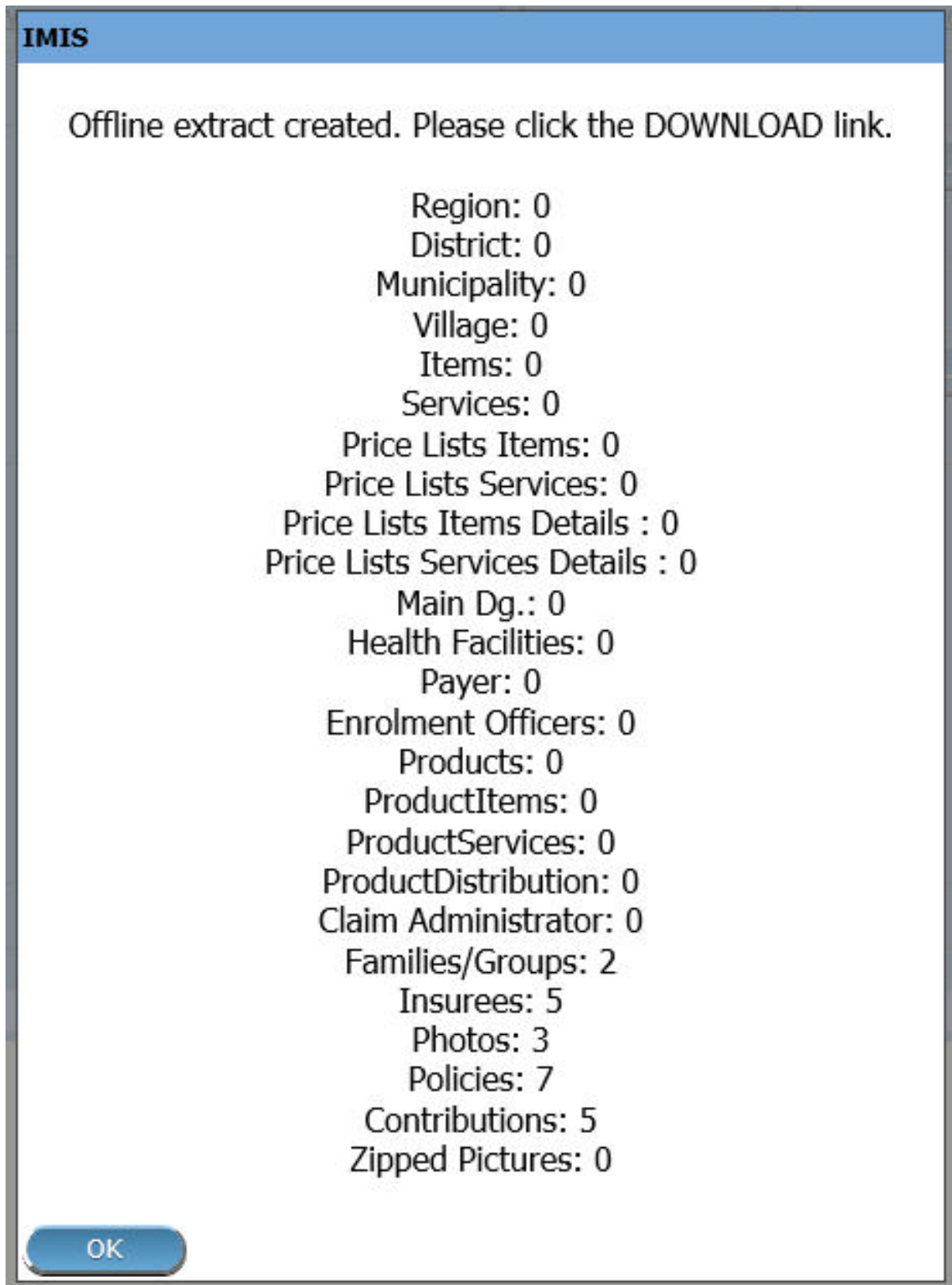
We are now ready to download the extract to our computer.

The combo box next to the district selector contains information on all generated extracts with the sequence number and date. (e.g. Sequence 000007 – Date 06-09-2012). If the extract selector does not show any entries (blank) it means that no previous extracts were created. At least one full extract needs to be generated. This is needed to initialise a new offline openIMIS installation.

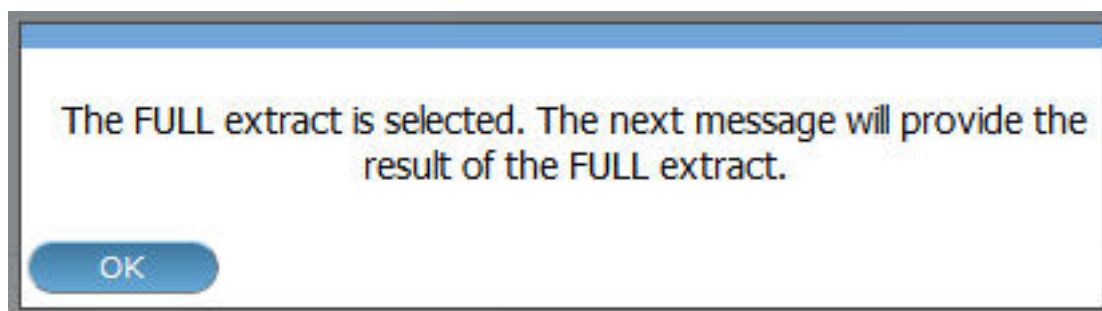
To download the actual extracts, the operator needs to select the desired extract sequence from the list of available extracts.

Four different types of extracts could be downloaded by clicking one of the following buttons:

- **Download D** (Differential extract)
  - Will download the selected differential extract with the following filename  
*Filename: OE\_D\_ <DistrictID>\_ <Sequence>.RAR (e.g. OE\_D\_1\_8.RAR)*
- **Download F** (Full extract)
  - Will download the latest full extract with the following filename  
*Filename: OE\_F\_ <DistrictID>\_ <Sequence>.RAR (e.g. OE\_F\_1\_8.RAR)*
- **Download E** (Empty extract)
  - Will download the latest full extract with the following filename  
*Filename: OE\_E\_ <DistrictID>\_ <Sequence>.RAR (e.g. OE\_F\_1\_8.RAR)*
- **Download Photos D** (Differential Photo extract)
  - Will download the selected differential photo extract with filename:  
*Filename: OE\_D\_ <DistrictID>\_ <Sequence>.RAR (e.g. OE\_D\_1\_8\_Photos.RAR)*
- **Download Photos F** (Full Photo extract)
  - Will download the latest FULL photo extract with the following filename  
*Filename: OE\_D\_ <DistrictID>\_ <Sequence>.RAR (e.g. OE\_F\_1\_8\_Photos.RAR)*



Img. 1.5.29: Image 186



Img. 1.5.30: *Image 187*

After clicking the desired extract download button, the file download dialog box appears to select the destination folder for the extract file as shown below:

In case the extract file is not available (anymore) on the server, the following dialog box might appear:

The reason for this box to appear could be that the file to be downloaded has been removed from the server or that you have attempted the download a full extract but no full extract was generated (only the differential extracts exist). It is also possible that you have attempted to download a photo extract but no photos were added since the last extract.

Checking the checkbox **In background** means that the off-line extract will be created in background and the user will be notified by e-mail (provided his/her e-mail is entered in the register of users) as shown below:

In case the extract is created in the background, the following dialog box appears:

#### **D - Upload Claims section**

- **Browse**

Browse for the file from the IMIS-Offline or IMIS (Claims ) application containing claims to be uploaded.

- **Upload**

Upload claims contained in the selected file.

#### **E - Upload Enrolment section**

- **Browse**

Browse for the file from the IMIS-Offline or IMIS (Policies )application containing newly enrolled or renewed policies to be uploaded.

- **Upload**

Upload policies contained in the selected file.

#### **F - Upload Feedback section**

- **Browse**

Browse for the file from the IMIS-Offline or IMIS (Policies )application containing feed-backs to be uploaded.

- **Upload**

Upload feedbacks contained in the selected file.

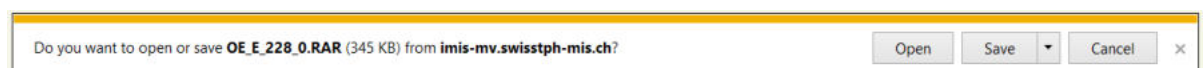
#### **G - Button section**

The **Cancel** button brings the operator back to the [Home Page](#).

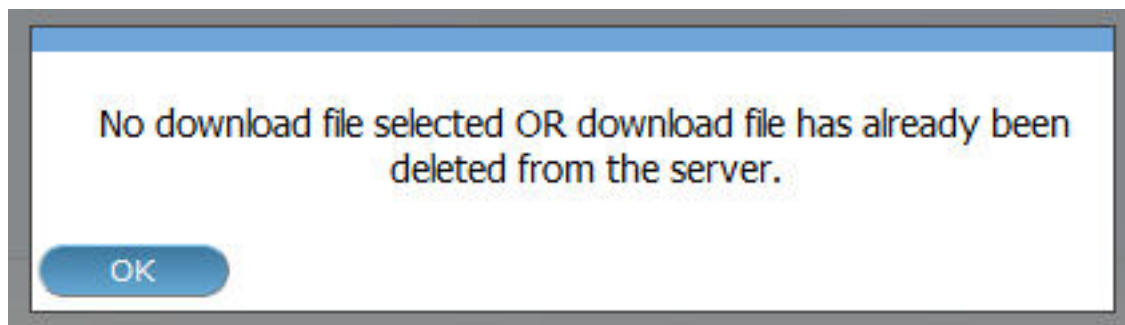
#### **H - Information panel**



Img. 1.5.31: Image 188



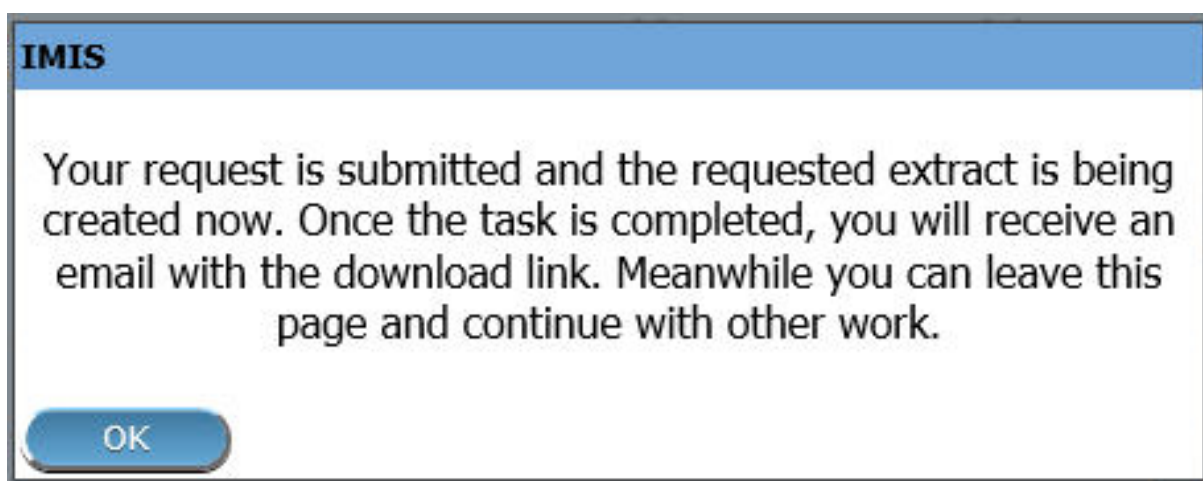
Img. 1.5.32: Image 189



Img. 1.5.33: Image 190



Img. 1.5.34: Image 191



Img. 1.5.35: Image 192



The Information Panel is used to display messages back to the user. Messages will occur once an action has completed or if there was an error at any time during the process of these actions.

## IMIS Extracts (OFFLINE MODE)

### Offline HF

Import Extract

Choose File No file chosen Upload

Import Photos

Choose File No file chosen Upload

Download Claim XMLs

Download

Cancel

Last extract sequence : 9 OFF-LINE HF 04506:Hombolo Makulu

Img. 1.5.36: Image 193

### A - Import Extract

Used to extract photos obtained from online IMIS

### B - Import Photos

Used to upload photos obtained from online IMIS

### C - Download Claim XMLs

Used to download claims made in the offline health facility prior to be sent to online IMIS

### Offline Insurer

Import Extract

A Choose File No file chosen Upload

Import Photos

B Choose File No file chosen Upload

Download Enrolment XMLs

C Download

D Cancel

E No previous extracts found! OFF-LINE | CHF: 10

Img. 1.5.37: Image 194

### A - Import Extract

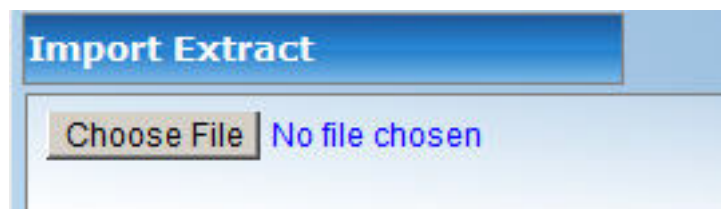
Used to upload extract obtained from online IMIS

## B - Import Photos

Used to upload photos obtained from online IMIS

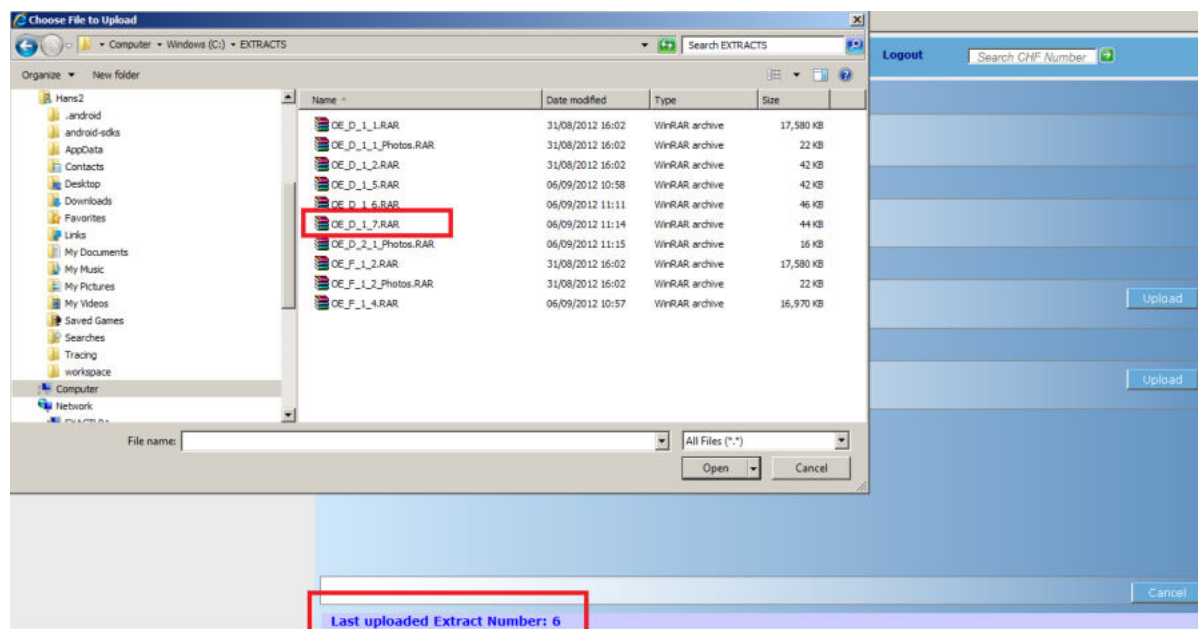
## C - Import Extract

The Choose file section should be clicked to select an extract file to upload/import. The following file selector appears for Internet explorer (the appearance might differ for different internet browsers):



Img. 1.5.38: Image 195

On clicking the Choose File button, the file selector dialog appears as shown below:



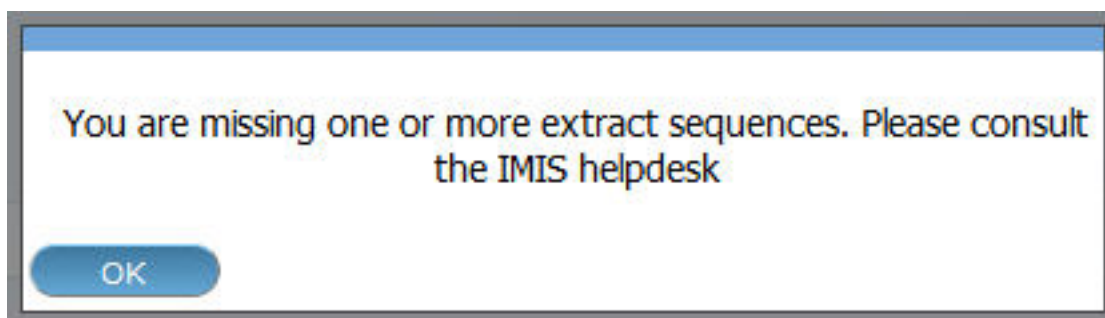
Img. 1.5.39: Image 196

With the import/upload of an extract it is important to understand that each extract has its sequence number. This sequence number is found in the filename of the extract. We would in case of differential imports/uploads have to follow the sequence. In the example screen above, it shows in the status bar, that the last import was number 6. Therefore we should select in this case the differential extract number 7 as highlighted in the file selection dialog.

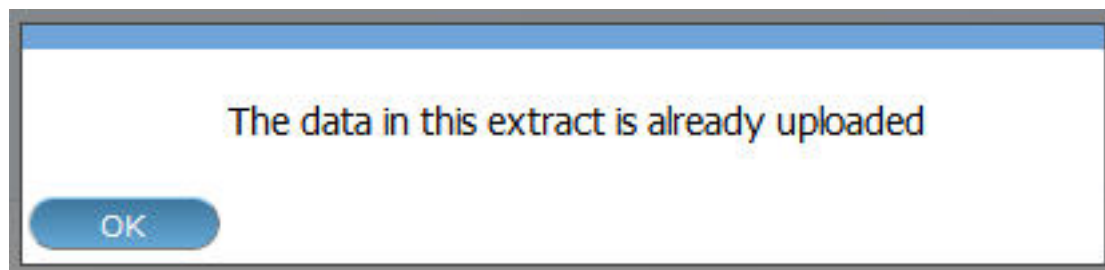
Alternatively the operator could select any full extract with a sequence number higher than 6. In case a wrong extract is selected, warning messages will appear as shown below:

In case you are missing extract sequences, additional extracts are needed to be uploaded before the extract selected. The extract selected, in this case, does not directly follow the last sequence as indicated in the status bar of the screen. The additional extracts are to be provided by NSHIP district office.

In case the extract file selected is valid, the system will import the data. New data will be added and existing data might be modified. After a successful import of an extract



Img. 1.5.40: *Image 197*



Img. 1.5.41: *Image 198*

(Differential and FULL), a form is displayed with the statistics of the import as shown below:

The above statistics are provided to give some quick overview of how many records were inserted or updated during the import process. In case we would for example update the phone number of an enrolment officer, it would result in one update and one insert as we always keep historical records. The photos inserts and updates are related to information on the photos, but are not the actual photographs. The actual photographs (\*.jpg) are uploaded separately.

#### **D - Import Photos**

The import of photos is optional and will have no further checking on sequence numbers. NSHIP should provide (if available) with each extract the photo extract as well.

E.g. (for Differential extract)

OR (for FULL extract)

The photo extract will contain all photographs associated with the actual extract in a zipped format. The Upload procedure will simply unzip the extract and copy the image files to the photo folder of IMIS.

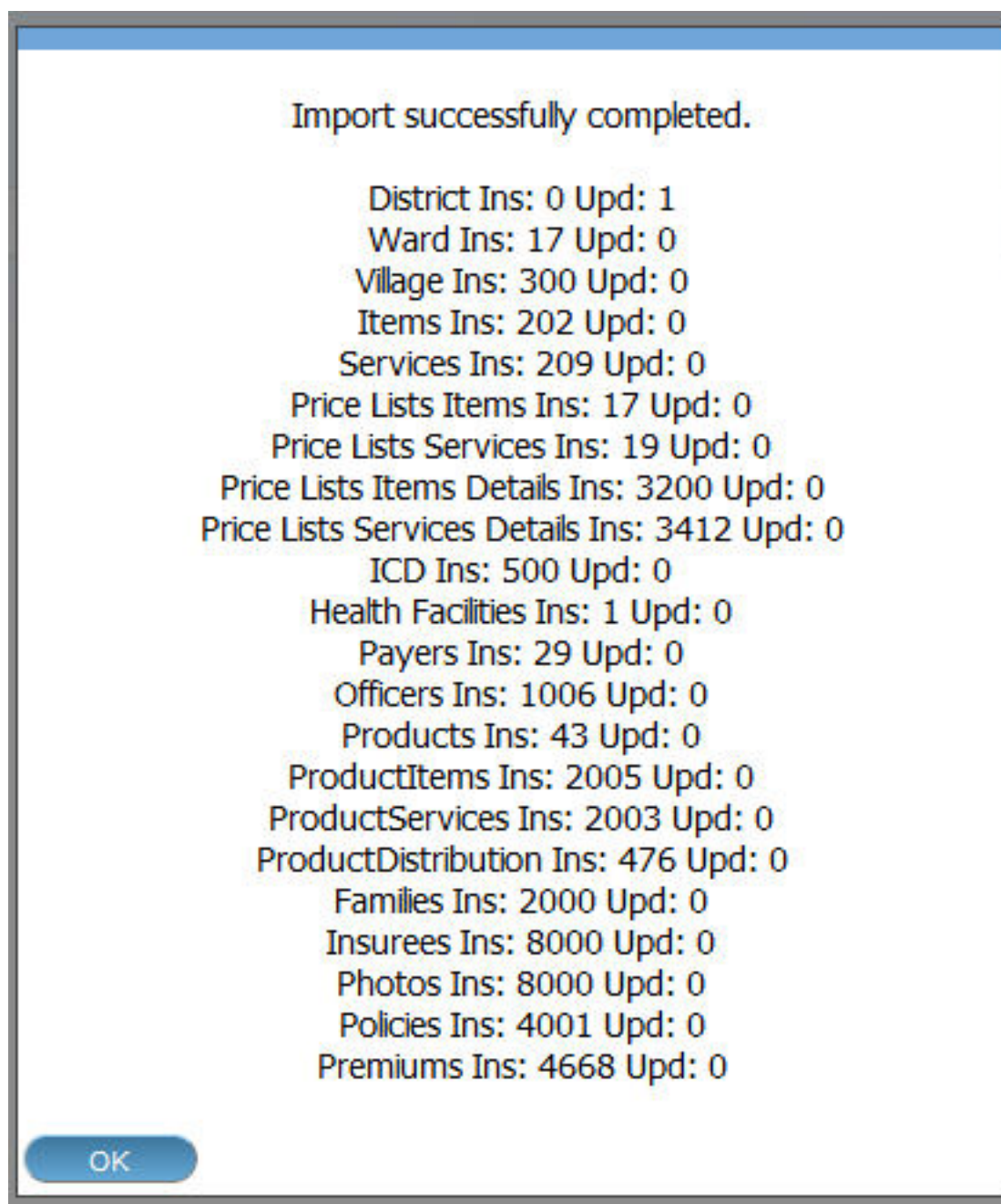
After successful upload of the photographs the following message appears:

#### **E - Button panel**

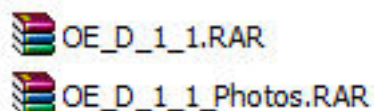
The 'Cancel' button brings the operator back to the main page of IMIS.

#### **F - Information panel**

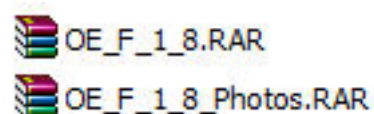
The Information Panel is used to display messages back to the user. Messages will occur once an action has completed or if there was an error at any time during the process of these actions. If the user opens the openIMIS extracts page (in offline mode only), the status bar will show the last sequence number uploaded.



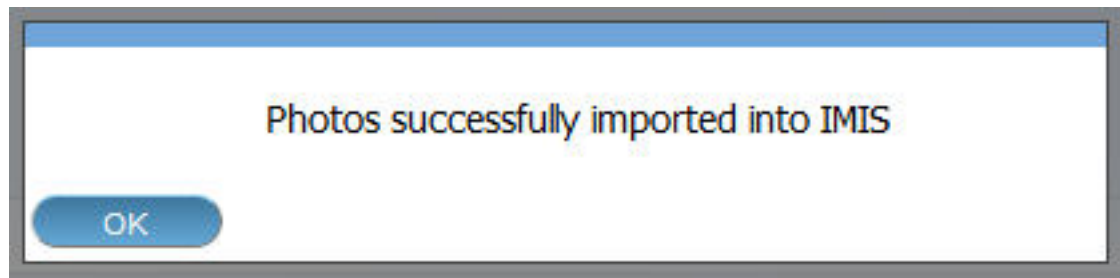
Img. 1.5.42: Image 199



Img. 1.5.43: Image 200



Img. 1.5.44: Image 201



Img. 1.5.45: *Image 202*

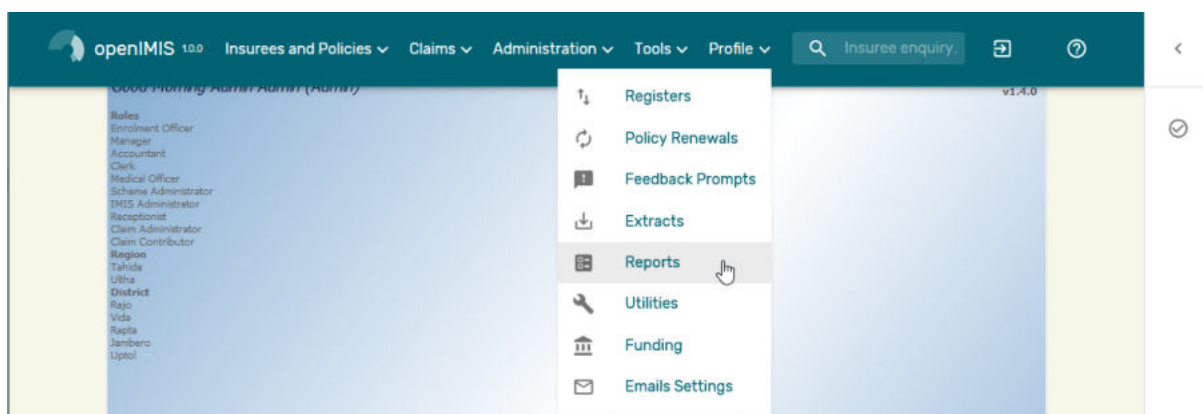
## 1.5.5 Reports

Access to the reports is generally restricted to the users with the role of Manager, Accountant, Scheme Administrator and openIMIS Administrator. By having access to the **Reports Page**, it is possible to generate several operational reports. Each report can be generated by users with a specific system role (Manager, Accountant, Scheme Administrator and IMIS Administrator) only or with a role including an access to Tools/Reports.

### Pre-Conditions

#### Navigation

All functionality for use with the administration of Reports can be found under the main menu **Tools**, sub menu **Reports**.



Img. 1.5.46: *Navigation Reports*

Clicking on the sub menu **Reports** re-directs the current user to the Reports Page (Img. 1.5.47).

The Reports Page is divided into four panels (Img. 1.5.47).

#### 1. Select Criteria

The Select Criteria panel or the filter panel allows a user to select specific criteria determining the scope of data included in the report. The criteria (Img. 1.5.48 – Img. 1.5.65) will change depending on the selected type of the report.

- Primary Operational Indicators - Policies Report.
- Primary Operational Indicators - Claims Report.
- Derived Operational Indicators Report.
- Contribution Collection Report.

**Reports**

Month: --Month-- Quarter: --Period-- Year: 2017 Region: --Select Region-- District: District Product: --Select Product--

- Primary Operational Indicators-policies
- Primary Operational Indicators-claims
- Derived Operational Indicators
- Contribution Collection
- Product Sales
- Contribution Distribution
- User Activity Report
- Enrolment Performance Indicators
- Status of Registers
- Insurees without Photos
- Payment Category Overview
- Matching Funds
- Claim Overview
- Percentage of Referrals
- Families and Insurees Overview
- Pending Insurees

Preview Cancel

Img. 1.5.47: Reports Page

**Reports**

Month: --Month-- Quarter: --Period-- Year: 2017 Region: --Select Region-- District: District Product: --Select Product--

Img. 1.5.48: Primary Operational Indicators - Policies Report Criteria

**Reports**

Month: --Month-- Year: 2017 Region: --Select Region-- District: District Product: --Select Product-- HF Code: -- Select HF Code --

Img. 1.5.49: Primary Operational Indicators - Claims Report Criteria

**Reports**

Month: --Month-- Year: 2017 Region: --Select Region-- District: District Product: --Select Product-- HF Code: -- Select HF Code --

Img. 1.5.50: Derived Operational Indicators Report Criteria

**Reports**

Date From: Date To: 2017 Region: --Select Region-- District: District Product: --Select Product-- Payment Type: -- Payment Type --

Img. 1.5.51: Contribution Collection Report Criteria



- Product Sales Report.

Img. 1.5.52: *Product Sales Report Criteria*

- Contribution Distribution Report.

Img. 1.5.53: *Contribution Distribution Report Criteria*

- User Activity Report.

Img. 1.5.54: *User Activity Report Criteria*

- Enrolment Performance Indicator Report.
- Status of Registers Report.
- Insurees without Photos Report.
- Payment Category Overview Report.
- Matching Funds Report.
- Claim Overview Report.
- Percentage of Referrals Report.
- Families and Insurees Overview Report.
- Pending Insurees Report.
- Renewals Report.
- Capitation Payment Report

The general meaning of selection criteria for creating of a report is as follows:

- **Date From**

Type in a date; or use the Date Selector Button, to enter the beginning of a period, in which policies have their enrolment, effective, expire or renewal days, contributions were paid or in claimed health care was provided. If used with a report, it is mandatory. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*

- **Date To**

Type in a date; or use the Date Selector Button, to enter the end of a period, in which policies have their enrolment, effective, expire or renewal days or in which claimed health care was provided. If used with a report, it is mandatory. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the space key.*



Reports

Month: --Month-- Quarter: --Period-- Year: 2017 Region: --Select Region-- District: District Product: --Select Product--

Img. 1.5.55: *Enrolment Performance Indicators Report Criteria*

Reports

Region: TestRegion District: -- Select a District --

Img. 1.5.56: *Status of Registers Report Criteria*

Reports

Region: TestRegion District: -- Select a District -- Enrolment Officer: -- Select Enrolment C

Img. 1.5.57: *Insurees without photos Report Criteria*

Reports

Date From: Date To: Region: TestRegion District: -- Select a District -- Product: -- Select Product--

Img. 1.5.58: *Payment Category Overview Report Criteria*

Reports

Date From: Date To: Region: TestRegion District: -- Select a District -- Product: -- Select Product-- Payer: -- Select a Payer --

Img. 1.5.59: *Matching funds Report Criteria*

Reports

Date From: Date To: Region: TestRegion District: -- Select a District -- Product: -- Select Product-- HF Code: -- Select HF Code --

Claim Status: -- Select Status -- Status: -- Select Status --

Img. 1.5.60: *Claim Overview Report Criteria*

Reports

Date From: Date To: Region: TestRegion District: -- Select a District --

Img. 1.5.61: *Percentage of Referrals Report Criteria*

Reports

Date From: Date To: Region: TestRegion District: -- Select a District -- Municipality: Village: Status: -- Select Status --

Img. 1.5.62: *Families and Insurees Overview Report Criteria*

Reports

Date From: Date To: Region: TestRegion District: -- Select a District -- Enrolment Officer: -- Select Enrolment C

Img. 1.5.63: *Pending Insurees Report Criteria*

The screenshot shows a web interface titled "Reports". Below the title is a form with several fields: "Date From" and "Date To" (both empty), "Region" (a dropdown menu with "TestRegion" selected), "District" (a dropdown menu with "-- Select a District --" selected), "Product" (a dropdown menu with "-- Select Product--" selected), and "Enrolment Officer" (a dropdown menu with "-- Select Enrolment C" selected). Below these fields is a "Sorting" section with a dropdown menu set to "Renewal Date".

Img. 1.5.64: Image 221 Renewals Report Criteria

The screenshot shows a web interface with a form containing five dropdown menus: "Month" (set to "--Month--"), "Year" (set to "2017"), "Region" (set to "--Select Region--"), "District" (empty), and "Product" (set to "--Select Product--").

Img. 1.5.65: Image 222 Capitation Payment Report Criteria

- **Payment Type**

Select the **Payment Type** from the drop down list by clicking on the right arrow. By selecting any of the options a user can filter the report on a particular type of the payment. This filter is not mandatory, leave it blank to preview the report on all the payment modes.

- **Region**

Select the **Region**; from the list of regions by clicking on the arrow on the right of the selector to select a region, data of which should be included for the report. *Note: The list will only be filled with the regions assigned to the current logged in user. If this is only one then the region will be automatically selected.*

- **District**

Select the **District**; from the list of districts by clicking on the arrow on the right of the selector to select a district, data of which should be included for the report. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user. If this is only one then the district will be automatically selected.*

- **Product**

Select the **Product**; from the list of products by clicking on the arrow on the right of the selector to include in the report data for the specific product. *Note: The list will only be filled with the products belong to the districts assigned to the current logged in user. If this is only one then the product will be automatically selected.*

- **Month**

Select the **Month** from the list of months by clicking on the arrow on the right of the selector to include in the report data relating to that month selected.

- **Year**

Select the **year** from the list of years by clicking on the arrow on the right of the selector to include in the report data relating to that year selected.

- **Quarter**

Select the **quarter** from the list of quarters by clicking on the arrow on the right of the selector to include in the report data relating to that quarter selected.

- **HF Code**

Select the **HF Code**; from the list of health facility codes by clicking on the arrow on the right of the selector to create the report for the specific health facility. *Note: The list will only be filled with health facility codes of health facilities*

*belonging to the districts assigned to the current logged in user. If this is only one then the health facility code will be automatically selected.*

- **Enrolment Officer**

Select the enrolment officer; from the list of enrolment officers by clicking on the arrow on the right of the selector to select enrolment officer data of whom should be included in the report. *Note: The list will only be filled with the enrolment officers assigned to the current selected district. If this is no district selected the enrolment officers list will be filled by all districts' enrolment officers*

- **Payer**

Select the payer from the drop down list by clicking on the right arrow. By selecting any of the options a user can filter the report on a particular payer. This filter is not mandatory; leave it blank to preview the report on all the payers.

- **Claim Status**

Select the claim status from the drop down list by clicking on the right arrow. By selecting any of the options a user can filter the report on a particular claim status. This filter is not mandatory, leave it blank to preview the report on all the claim statuses.

- **Sorting**

Select the way of sorting of records in the report from the list of available ways of sorting (**Renewal Date, Receipt Number, Enrolment Officer**).

- **Previous**

Select the previous reports from the drop down list by clicking on the right arrow. By selecting any of the options a user can fetch a report which was produced before. *Note: This filter is available only for Matching Funds Report.*

- **CONTROL NO.**

Enter a control number to get a payment corresponding to the entered control number. This filter is not mandatory. *Note: This filter is available only for Contribution Payment Report.*

- **PAYMENT STATUS**

Select either Matched or Unmatched as the payment status. *Note: This filter is available only for Contribution Payment Report.*

- **POSTING STATUS**

Select the status of posting of requests for control numbers. This filter is not mandatory. *Note: This filter is available only for Control Number Assignment.*

- **ASSIGNMENT STATUS**

Select the status of results of requests for control number. This filter is not mandatory. *Note: This filter is available only Control Number Assignment Report.*

- **INSURANCE NUMBER**

Enter the insurance number of an insuree. This filter is not mandatory. *Note: This filter is available only Claim History Report.*

- **MODE**

Select the mode (Prescribed Contributions, Actually Paid Contributions) of calculation of commissions. This filter is mandatory. *Note: This filter is available only Overview of Commissions.*

- **COMMISSION RATE**

Enter a commission rate as % of an assessment base. This filter is mandatory. Note: This filter is available only Overview of Commissions

- **Date Selector Button**

Clicking on the **Date Selector Button** will pop-up an easy to use, calendar selector (Tab. 1.5.5) by default the calendar will show the current month, or the month of the currently selected date, with the current day highlighted.

- At anytime during the use of the pop-up, the user can see the date of **today**.
- Clicking on *today* will close the pop-up and display the today's date in the corresponding date entry box.
- Clicking on any day of the month will close the pop-up and display the date selected in the corresponding date entry box.
- Clicking on the arrow to the left displays the previous month.
- Clicking on the arrow on the right will displays the following month.
- Clicking on the month will display all the months for the year.
- Clicking on the year will display a year selector.



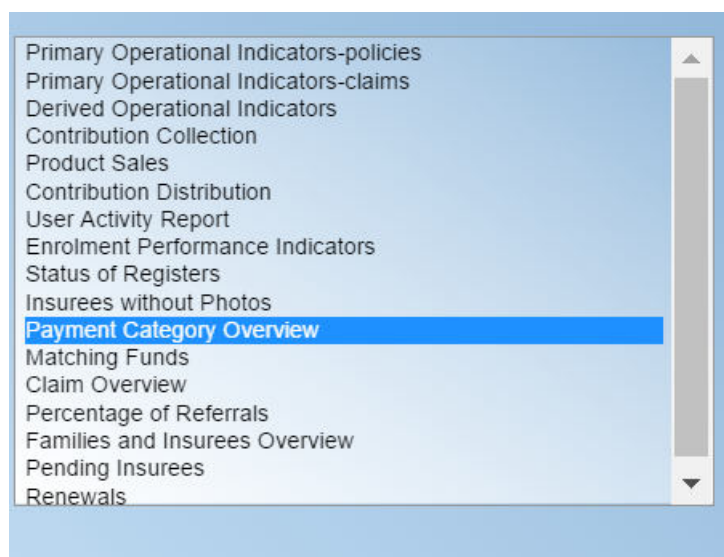
*Calendar Selector - Search Panel*

## 1. Report Type Selector

This panel contains a list of available report types. A user can select to create a desired report by clicking on the report type list item (Img. 1.5.66) and narrow the report using the criteria being shown on the panel above, and then click the **preview** button to create the report. Available report types are:

- Primary Operational Indicators Report.
- Derived Operational Indicators Report.
- Contribution Collection Report.
- Product Sales Report.
- Contribution Distribution.
- User Activity Report.
- Enrolment Performance Indicators
- Status of Registers
- Insures without Photos.
- Matching Funds.
- Claim Overview.
- Payment Category Overview.
- Families and Insurees Overview.

- Pending Insurees.
- Percentage of Referrals.
- Capitation Payment
- Rejected Photos
- Contribution Payment
- Control Number Assignment
- Overview of Commissions
- Claim History



Img. 1.5.66: *Report Type Selector*

## 2. Button Panel

- Preview button

By clicking on this button, the system will process the selected report type basic on the corresponding criteria submitted and re-direct current user to [Report Page](#), for previewing the processed report. At any time the user clicks on the preview button, the current criteria will be saved in the session and can be reused later in the same session and for other report types where the same criteria are found.

- Cancel button

By clicking on this button, the current user will be re-directed to the [Home Page](#).

## 3. Information Panel

The Information Panel is used to display messages back to the user. Messages will occur if there was an error at any time during the processing of the reports.

## Report Preview

The report viewer offers the facility to navigate through the report either by using the arrows or by typing in a page number at the top of the report. Another feature of the report viewer is to export the report in different formats. Currently system supports three formats; Word, Excel and PDF. Select the desired format from the list by clicking on the Export link. Use the **Go Back to Selector** link to go back to the previous selection page.

Below are the types of reports as they can be seen in the report page.

## 1. primary operational indicators - policies report

The report provides aggregate data relating to policies and insurees according to insurance products. The report can be run by users with the system role Manager or with a role including an access to Tools/Reports/Primary Operational Indicators-policies. The table below will provide an overview on primary indicators of the report.

Tab. 1.5.1: Table Overview of Policies indicators

Code	Primary indicators	Dimension	Description
P1	Number of policies	Time, Insurance product	The number of policies of given insurance product on the last day of a respective period (Status of the policy is Active, the last day of period is within <Effective date, Expiry day>)
P2	Number of new policies	Time, Insurance product	The number of new policies of given insurance product during a respective period (Enrolment date is within the respective period, there is <b>no</b> preceding policy with the same (or before converted) insurance product for-given policy)
P3	Number of suspended policies	Time, Insurance product	The number of policies for given insurance product that were suspended during a respective period (Status of the policy is Suspended, suspension took place within the respective period)
P4	Number of expired policies	Time, Insurance product	The number of policies for given insurance product that expired during a respective period (Status of the policy is Expired, expiration took place within the respective period)
P5	Number of renewals	Time, Insurance product	The number of policies that were renewed forgiven insurance product (or a converted) during a respective period (Enrolment date is within the respective period, there is a preceding policy with the same (or before converted) product forgiven)
P6	Number of insurees	Time, Insurance product	The number of insurees covered by policies of given insurance product on the last day of a respective period (An insuree belongs to a family with an active coverage on the last day of the respective period-see P1 )
P7	Number of newly insured insurees	Time, Insurance product	The number of insurees covered by new policies of given insurance product during a respective period (An insuree belongs to a family with newly acquired policy during the respective period-see P2 )
P8	Newly collected Contributions	Time, Insurance product	Amount of acquired Contributions (for policies of given insurance product) during a respective period (Date of payment of a Contribution is within the respective period)

Continued on next page

Tab. 1.5.1 – continued from previous page

Code	Primary indicators	Dimension	Description
P9	Available Contributions	Time, Insurance product	Amount of Contributions that should be allocated for policies of given insurance product for a respective period provided a uniform distribution throughout the insurance period takes place. (If the respective period overlaps with <Effective date, Expiry day> of a policy then a proportional part of corresponding Contributions relating to the respective period is included in available Contributions)

Below is an example of the report:

Go back to selector.

Primary Operational Indicators-policies

Period : Year 2017 | Region: TestRegion | District: TestDistrict1 | Product: NF01

Quarter: 1

2017 January

Code	Name	Policy	New Policy	Suspended Policy	Expired Policy	Policy Renewal	Insuree	New Insuree	Cor
		M F O	M F O				M F O	M F O	
NF01	National free enrolment							0 0	
Total for 2017 January :								0 0	

2017 February

Code	Name	Policy	New Policy	Suspended Policy	Expired Policy	Policy Renewal	Insuree	New Insuree	Cor
		M F O	M F O				M F O	M F O	
NF01	National free enrolment							0 0	
Total for 2017 February :								0 0	

2017 March

Code	Name	Policy	New Policy	Suspended Policy	Expired Policy	Policy Renewal	Insuree	New Insuree	Cor
		M F O	M F O				M F O	M F O	

Img. 1.5.67: Preview – Primary Operational Indicators - Policies Report

## 2. primary operational indicators - claims report

The report provides aggregate data relating to policies and insurees according to insurance products. The report can be run by users with the system role Manager or with a role including an access to Tools/Reports/Primary Operational Indicators-claims. The table below will provide an overview on primary indicators of the report.

Tab. 1.5.2: Table Overview of operational indicators

Code	Primary indicators	Dimension	Description
P10	Number of claims	Time, Health facility, Insurance product	The number of claims for given insurance product that emerged during a respective period (Start date of a claim is within the respective period)

Continued on next page



Tab. 1.5.2 – continued from previous page

Code	Primary indicators	Dimension	Description
P11	Amount remunerated	Time, Health facility, Insurance product	Amount remunerated for claims for given insurance product that emerged during a respective period (Start date of a claim is within the respective period)
P12	Number of rejected claims	Time, Health facility, Insurance product	The number of claims for given insurance product that emerged during a respective period and were rejected (Start date of a claim is within the respective period and the Status approval of the claim is Rejected)

Below is an example of the report:

### 3. derived operational indicators report

The report provides operational indicators derived from primary operational indicators. The report can be run by users with the system role Manager or with a role including an access to Tools/Reports/Derived Operational Indicators. The table below will provide an overview on the actual derived indicators provided by the report.

Tab. 1.5.3: Table Overview of derived operational indicators

Code	Derived	Dimension	Description
D1	Incurred claims ratio	Time, Insurance product	It is the ratio P11/P9
D2	Renewal ratio	Time, Insurance product	It is the ratio P5/P4
D3	Growth ratio	Time, Insurance product	It is the ratio P2/P1-for immediately preceding period
D4	Promptness of claims settlement	Time, Insurance product	It is the average (date of sending to payment-Date of submission of the claim) for all claims relating to given insurance product and emerging in a respective period Date of sending of payment is not in the structure of Claim, it has to be retrieved from a journal-can be?)
D5	Claims settlement ratio	Time, Health facility, Insurance product	It is the ratio (P10-P12)/P10
D6	Number of claims per insuree	Time, Insurance product	It is the ratio P10/P6
D7	Average cost per claim	Time, Health facility, Insurance product	It is the ratio P11/P10
D8	Satisfaction level	Time District, Health facility	The average mark from feedbacks received in a respective period
D9	Feedback response ratio	Time, District, Health facility	The ratio of number of feedbacks received (up to time of creation of the report) and number of feedbacks asked for in a respective period

Below is an example of the report:

### 4. Contribution collection report

The report lists all actual payments of contributions according to insurance products in

Go back to selector.

Primary Operational Indicators-claims

Region : TestRegionX | District : TestDistrictX1 | Product: All

Code	Name	Total Claims	Remunerated	Rejected Claims
TestDistrict4				
2017 January				
HFX01-Regional hospital X				
RF01	Regional free	0	0	0
Total for HFX01 :		0	0	0
Total for 2017 January :		0	0	0
2017 February				
HFX01-Regional hospital X				
RF01	Regional free	0	0	0
Total for HFX01 :		0	0	0
Total for 2017 February :		0	0	0
2017 March				
HFX01-Regional hospital X				
RF01	Regional free	0	0	0
Total for HFX01 :		0	0	0

Img. 1.5.68: Preview – Primary Operational Indicators - Claims Report

Go back to selector.

Derived Operational Indicators

Region: TestRegion | District: TestDistrict1 | Product: DF01

Code	Name	Claim Settlement Ratio	Average Cost per Claim	Satisfaction Level	Feedback Response Ratio
TestDistrict1					
2017 July					
HF01-Regional hospital					
DF01	District free enrolment	1	0.00	5.0	1
Total for HF01 :		1	0.00	5.0	1
HF02-District1 health Center					
DF01	District free enrolment	1	0.00	3.3	1
Total for HF02 :		1	0.00	3.3	1
Total for 2017 July :		2	0.00	4.1	2
Total for TestDistrict1 :		2	0.00	4.1	2
Overall Total :		2	0.00	4.1	2

Derived Operational Indicators - Printed on: 7/31/2017 1:46:27 PM

1 of 1

Img. 1.5.69: Preview – Derived Operational Indicators Report

the defined period. The report can be used as input to an accounting system. The report can be run by users with the the system role Accountant or with a role including an access to Tools/Reports/Contribution Collection. Payments are assigned to the specified period according to the actual date of payment. (Img. 1.5.70)

**Contribution Collection Report**

Date From 01/01/2017 To 02/07/2017, Region: TestRegion, District: TestDistrict1, Product: DF01 - District free enrolment, Account Code: ...

Payment Date	Pay Type	Amount
01/05/2017	Cash	2000.00
10/05/2017	Bank	60000.00
10/05/2017	Mobile	4000.00
23/05/2017	Bank	90099.00
26/05/2017	Cash	28000.00
<b>DF01 Collection :</b>		<b>184,099.00</b>
<b>Total Collection in : TestDistrict1 :</b>		<b>184,099.00</b>
		<b>184,099.00</b>

Contribution Collection Report - Printed on: 7/2/2017 2:10:42 PM 1 of 1

Img. 1.5.70: Preview – Contribution Collection Report

## 5. product sales report

The report provides overview of selling of policies according to insurance products in terms of calculated contributions (not necessarily actually paid). The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Product Sales. Policies are assigned to the specified period according to their effective days. (Img. 1.5.71)

**Product Sales**

Date From 01/07/2017 To 31/07/2017, Region: TestRegion, Product: RX01 - Regional fixed enrolment, Account Code: Rx01C

Effective Date	Amount
01/07/2017	31,000.00
04/07/2017	10,000.00
<b>RX01's Collection :</b>	
<b>41,000.00</b>	
<b>Total Collection in : TestDistrict1 :</b>	
<b>41,000.00</b>	
<b>TestDistrict2</b>	
<b>RX01</b>	
<b>Effective Date</b>	
<b>Amount</b>	
04/07/2017	10,000.00
<b>RX01's Collection :</b>	
<b>10,000.00</b>	
<b>Total Collection in : TestDistrict2 :</b>	
<b>10,000.00</b>	
<b>Total Sales :</b>	
<b>51,000.00</b>	

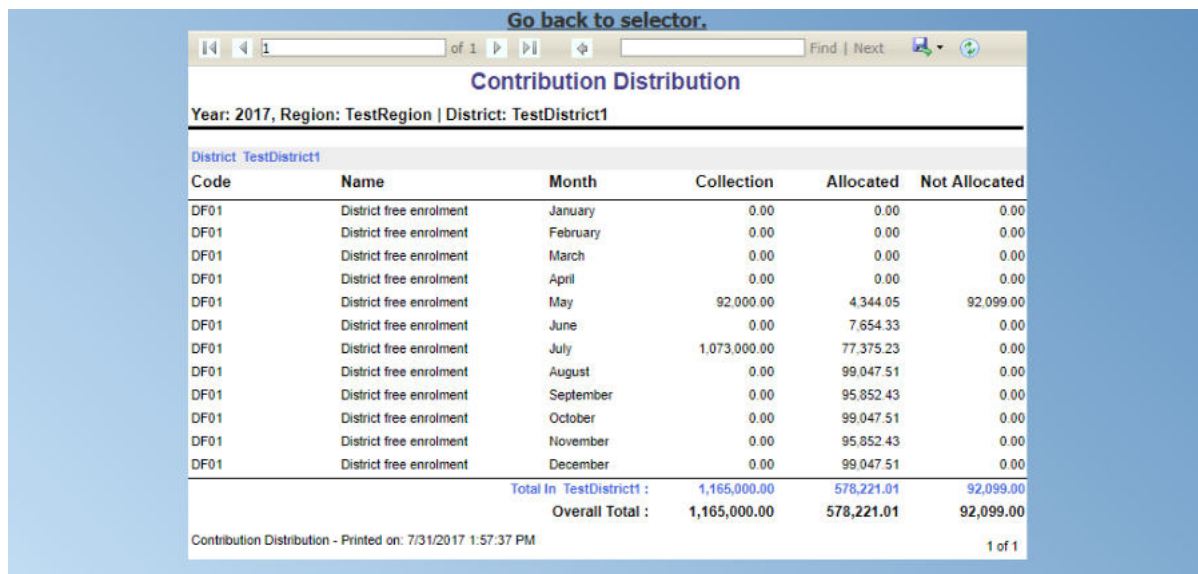
Product Sales - Printed on: 7/31/2017 1:53:00 PM 1 of 1

Img. 1.5.71: Preview – Product Sales Report

## 6. Contribution distribution report

The report provides proportional amount of actually paid contributions allocated by openMIS to specific months according to insurance products. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Contribution Distribution. This report shows the information about the **Total collection**, **Allocated amount** and **Not allocated** amount for contributions in the specified period.

**Allocated** amount is the proportionally calculated amounts of contributions paid covering the month. **Not Allocated** amount is the amount collected for contributions that have a start date in the future (after the month in question). (Img. 1.5.72)



Code	Name	Month	Collection	Allocated	Not Allocated
DF01	District free enrolment	January	0.00	0.00	0.00
DF01	District free enrolment	February	0.00	0.00	0.00
DF01	District free enrolment	March	0.00	0.00	0.00
DF01	District free enrolment	April	0.00	0.00	0.00
DF01	District free enrolment	May	92,000.00	4,344.05	92,099.00
DF01	District free enrolment	June	0.00	7,654.33	0.00
DF01	District free enrolment	July	1,073,000.00	77,375.23	0.00
DF01	District free enrolment	August	0.00	99,047.51	0.00
DF01	District free enrolment	September	0.00	95,852.43	0.00
DF01	District free enrolment	October	0.00	99,047.51	0.00
DF01	District free enrolment	November	0.00	95,852.43	0.00
DF01	District free enrolment	December	0.00	99,047.51	0.00
Total In TestDistrict1 :			1,165,000.00	578,221.01	92,099.00
Overall Total :			1,165,000.00	578,221.01	92,099.00

Contribution Distribution - Printed on: 7/31/2017 1:57:37 PM

Img. 1.5.72: Preview – Contribution Distribution Report

## 7. user activity report

The report shows activities of users according to types of activities and types of entities to which the activities relate. The report can be run by users with system role IMIS Administrator or with a role including an access to Tools/Reports/User Activity. (Img. 1.5.73)

## 8. enrolment performance indicator report

The report provides overview of activity of enrolment officers. The report can be run by users with the system role Manager or with a role including an access to Tools/Reports/Enrolment Performance Indicator. (Img. 1.5.74)

## 9. status of registers report

The report provides an overview of the number of items in registers according to districts. The report can be run by users with the system role Scheme Administrator or with a role including an access to Tools/Reports/Status of Registers. (Img. 1.5.75)

## 10. insurees without photos

The report lists all insurees according to enrolment officers that have not assigned a photo. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Insurees without Photos. (Img. 1.5.76)

## 11. matching funds

The report lists all families/groups according to insurance products and (institutional) payers that paid contributions in the specified period. This report is useful for claiming of subsidies for running of health insurance schemes. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Matching Funds. (Img. 1.5.77)

## 12. claim overview

The report provides detailed data about results of processing of claims in openIMIS according to insurance products and health facilities. The report can be used as a tool for communication between a health insurance scheme and its contractual health facilities. The report can be run by users with the system role Accountant or with a

Go back to selector.

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### User Activity Report

Period From 01/07/2017 To 31/07/2017

User Name	jiri		
Record Type	Action Type	Record Identity	Action Time
Login	Logged In		02/07/2017 13:06:44
Login	Logged In		02/07/2017 13:06:47
Login	Logged Out		02/07/2017 13:27:53
Login	Logged In		02/07/2017 13:44:59
Login	Logged In		02/07/2017 13:53:33
Login	Logged Out		02/07/2017 14:06:01
Login	Logged In		02/07/2017 14:09:29
Login	Logged Out		02/07/2017 14:52:34
Login	Logged In		02/07/2017 22:51:21
Login	Logged Out		02/07/2017 23:17:40
Login	Logged In		03/07/2017 19:10:58
Login	Logged Out		03/07/2017 19:32:40
Login	Logged In		03/07/2017 21:42:15
Login	Logged In		03/07/2017 22:11:35
Login	Logged Out		03/07/2017 22:16:56
Login	Logged In		03/07/2017 22:17:00
Login	Logged Out		03/07/2017 22:33:21
Enrolment Officer	Modified	Code E001 Name:James	03/07/2017 23:37:12
Insuree	Modified	Insurance No.:111111191	03/07/2017 23:43:20
Photo	Inserted	Assign to Insurance No.:111111191	03/07/2017 23:43:20
Login	Logged In		04/07/2017 00:02:19
Login	Logged Out		04/07/2017 00:03:54
Login	Logged Out		04/07/2017 00:04:11

Img. 1.5.73: Preview – User Activity Report

Go back to selector.

1 of 2 Find | Next

Enrolment Performance Indicators

Period : Year 2017 | Region: TestRegionX | District: TestDistrictX1 | Product: RX001

Enrolment Officers Code

E011 - John Enrolment1

Active

Quarter: 1

2017 January

Code	Name	Policy	New Policy			Suspended Policy	Expired Policy	Policy Renewal	Insuree			New Insuree			C	
			M	F	O	M	F	O		M	F	O	M	F	O	
RX001	Regional X product															
2017 January :																

2017 February

Code	Name	Policy	New Policy			Suspended Policy	Expired Policy	Policy Renewal	Insuree			New Insuree			C	
			M	F	O	M	F	O		M	F	O	M	F	O	
RX001	Regional X product															
2017 February :																

2017 March

Code	Name	Policy	New Policy			Suspended Policy	Expired Policy	Policy Renewal	Insuree			New Insuree			C	
			M	F	O	M	F	O		M	F	O	M	F	O	
RX001	Regional X product															
2017 March :																

Img. 1.5.74: Preview – Enrolment Performance Indicator Report

Go back to selector.

1 of 1 Find | Next

### Status of Registers

Region: TestRegion | District: TestDistrict1

District Name	No of Enrolment Officers	No of Users	No of Insurance Products	No of Health Facilities	No of Service Pricelists	No of Item Pricelists	No of Services	No of Medical Items	No of
	Active	Non-Active							
TestDistrict1	4		13	3	2	2	2	10	5
Total	4		13	3	2	2	2		

Status of Registers - Printed on: 7/31/2017 2:10:45 PM

Img. 1.5.75: Preview – Status of Registers Report

Go back to selector.

1 of 1 Find | Next

### Insurees without Photos

Region: TestRegion | District: TestDistrict1 | Enrolment Officer: E001 - Fox James

District: TestDistrict1

Enrolment Officers: E001 - Fox James (Active)

Municipality: TestMunicipality11

Village: TestVillage111

Insurance Number	Last Name	Other Names	Gender	IsHead
00001	Soni	Hiren	M	Yes
000011	Soni	Nisha	F	No
000012	Soni	Pooja	F	No
000013	Hindocha	Dhyey	F	No
111111111	Gatsby	John	M	Yes
111111112	Gatsby	Elis	F	No
111111121	Bock	John	M	No
111111122	Bock	Elly	F	No
111111123	Bock	James	M	No
111111124	Bock	Julia	F	No
111111125	Bockwurst	Peter	M	No
111111131	Glenn	Gilmour	M	Yes
111111132	Glenn	Julia	F	No
111111133	Glenn	John	M	No
111111140	Fuchs	Elis	F	No
111111141	Fuchs	Konrad	M	Yes
111111142	Fuchs	Elis	F	No
111111143	Fuchs	Jane	F	No
111111144	Fuchs	Luciene	M	No

Img. 1.5.76: Preview – Insurees without photos

Go back to selector.

1 of 1 Find | Next

### Matching Funds

Product : RF01 - Regional free | Region : TestRegion | District : TestDistrict1 | Period From 01/01/2017 To 31/07/2017

Insurance Number	Birth Date	Municipality	Village	Enrol Date	Payment Date	Receipt No.	Payers
555444331	15/06/2004	TestMunicipality11	TestVillage111	23/07/2017	23/07/2017	6dc1	10.0
555444332	14/05/1994						
555777995	27/07/1998	TestMunicipality12	TestVillage122	05/07/2017	17/07/2017	asq12	13.0
555777992	27/07/1973						
Total							23.0

Matching Funds - Printed on: 7/31/2017 3:26:42 PM

Img. 1.5.77: Preview – Matching Funds



role including an access to Tools/Reports/Claim Overview. Claims are assigned to the specified period according to date of provision of health care (in case of in-patient care according to the date of discharge). (Img. 1.5.78)

Go back to selector.

1 of 2 Find | Next

Claim Overview

Health Facility : HF01 - Regional hospital | Region : TestRegion | District : TestDistrict1 | Period : From 01/01/2017 To 31/07/2017

Code	Date	Claim Admin	Visit From	Visit To	Insurance Number	Insuree	Status	Ref. Reason	Claimed	Approved	Adjusted	Paid																																								
cl07	03/01/2017	Book John	01/01/2017	02/01/2017	111111131	Glenn Gilmour	Valuated	0	8,500.00	6,500.00	6,500.00	6,500.00																																								
<table> <tr> <th>Service Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Service</th><th>Ref. Reason</th></tr> <tr> <td>X105</td><td>1.00</td><td>0.00</td><td>X105</td><td>4</td></tr> </table>													Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason	X105	1.00	0.00	X105	4																														
Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason																																																
X105	1.00	0.00	X105	4																																																
cl1	10/05/2017	Book John	10/05/2017	10/05/2017	111111121	Book John	Valuated	0	9,200.00	3,000.00	2,500.00	2,500.00																																								
<table> <tr> <th>Service Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Service</th><th>Ref. Reason</th></tr> <tr> <td>X101</td><td>1.00</td><td>0.00</td><td>X101</td><td>10</td></tr> <tr> <td>X102</td><td>1.00</td><td>0.00</td><td>X102</td><td>10</td></tr> <tr> <td>X103</td><td>1.00</td><td>0.00</td><td>X103</td><td>10</td></tr> <tr> <td>X105</td><td>1.00</td><td>0.00</td><td>X105</td><td>4</td></tr> </table> <table> <tr> <th>Item Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Item</th><th>Ref. Reason</th></tr> <tr> <td>Y201</td><td>1.00</td><td>0.00</td><td>Y201</td><td>10</td></tr> <tr> <td>Y203</td><td></td><td></td><td>Y203</td><td>4</td></tr> </table>													Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason	X101	1.00	0.00	X101	10	X102	1.00	0.00	X102	10	X103	1.00	0.00	X103	10	X105	1.00	0.00	X105	4	Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason	Y201	1.00	0.00	Y201	10	Y203			Y203	4
Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason																																																
X101	1.00	0.00	X101	10																																																
X102	1.00	0.00	X102	10																																																
X103	1.00	0.00	X103	10																																																
X105	1.00	0.00	X105	4																																																
Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason																																																
Y201	1.00	0.00	Y201	10																																																
Y203			Y203	4																																																
clm1	22/05/2017	Book John	22/05/2017	22/05/2017	111111141	Fuchs Konrad	Valuated	0	8,500.00	3,000.00	2,850.00	2,850.00																																								
<table> <tr> <th>Service Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Service</th><th>Ref. Reason</th></tr> <tr> <td>X101</td><td>1.00</td><td>0.00</td><td>X101</td><td>10</td></tr> <tr> <td>X105</td><td>1.00</td><td>0.00</td><td>X105</td><td>4</td></tr> </table> <table> <tr> <th>Item Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Item</th><th>Ref. Reason</th></tr> <tr> <td>Y201</td><td>1.00</td><td>0.00</td><td>Y201</td><td>10</td></tr> <tr> <td>Y203</td><td>1.00</td><td>0.00</td><td>Y203</td><td>4</td></tr> </table>													Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason	X101	1.00	0.00	X101	10	X105	1.00	0.00	X105	4	Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason	Y201	1.00	0.00	Y201	10	Y203	1.00	0.00	Y203	4										
Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason																																																
X101	1.00	0.00	X101	10																																																
X105	1.00	0.00	X105	4																																																
Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason																																																
Y201	1.00	0.00	Y201	10																																																
Y203	1.00	0.00	Y203	4																																																
clm2	22/05/2017	Book John	22/05/2017	22/05/2017	111111142	Fuchs Elle	Valuated	0	9,200.00	4,700.00	4,000.00	4,000.00																																								
<table> <tr> <th>Service Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Service</th><th>Ref. Reason</th></tr> <tr> <td>X101</td><td>1.00</td><td>0.00</td><td>X101</td><td>10</td></tr> <tr> <td>X102</td><td>1.00</td><td>0.00</td><td>X102</td><td>10</td></tr> </table> <table> <tr> <th>Item Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Item</th><th>Ref. Reason</th></tr> <tr> <td>Y201</td><td>1.00</td><td>0.00</td><td>Y201</td><td>10</td></tr> <tr> <td>Y203</td><td>1.00</td><td>0.00</td><td>Y203</td><td>4</td></tr> </table>													Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason	X101	1.00	0.00	X101	10	X102	1.00	0.00	X102	10	Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason	Y201	1.00	0.00	Y201	10	Y203	1.00	0.00	Y203	4										
Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason																																																
X101	1.00	0.00	X101	10																																																
X102	1.00	0.00	X102	10																																																
Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason																																																
Y201	1.00	0.00	Y201	10																																																
Y203	1.00	0.00	Y203	4																																																
clm5	23/05/2017	Book John	21/05/2017	22/05/2017	111111142	Fuchs Elle	Valuated	0	20,200.00	1,700.00	1,620.00	1,620.00																																								
<table> <tr> <th>Service Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Service</th><th>Ref. Reason</th></tr> <tr> <td>X105</td><td>80.00</td><td>0.00</td><td>X105</td><td>16</td></tr> </table> <table> <tr> <th>Item Code</th><th>Org. Qty</th><th>Adj. Qty</th><th>Ref. Item</th><th>Ref. Reason</th></tr> <tr> <td>Y204</td><td>10.00</td><td>0.00</td><td>Y204</td><td>5</td></tr> <tr> <td>Y203</td><td>1.00</td><td>0.00</td><td>Y203</td><td>4</td></tr> </table>													Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason	X105	80.00	0.00	X105	16	Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason	Y204	10.00	0.00	Y204	5	Y203	1.00	0.00	Y203	4															
Service Code	Org. Qty	Adj. Qty	Ref. Service	Ref. Reason																																																
X105	80.00	0.00	X105	16																																																
Item Code	Org. Qty	Adj. Qty	Ref. Item	Ref. Reason																																																
Y204	10.00	0.00	Y204	5																																																
Y203	1.00	0.00	Y203	4																																																
clm6	23/05/2017	Book John	23/05/2017	23/05/2017	111111143	Fuchs Jane	Valuated	0	300.00	300.00	300.00	300.00																																								

Img. 1.5.78: Image 236 Preview – Claim Overview

### 13. payment category overview

The report provides split of total contributions according to their categories. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Payment Category Overview. Contributions are assigned to the specified period according to actual payment date. (Img. 1.5.79)

**Go back to selector.**

1 of 1 Find | Next

**Payment Category Overview**

Region : TestRegion | District : TestDistrict1 | Date From 01/01/2017 Date To 31/07/2017

District Name : TestDistrict1

Code	Name	Registration Fee	Assembly Fee	Contribution	Photo Fee
RF01	Regional free	12,000.00	27,000.00	24,500.00	12,000.00
Total for TestDistrict1 :		12,000.00	27,000.00	24,500.00	12,000.00
Total :		12,000.00	27,000.00	24,500.00	12,000.00

Payment Category Overview - Printed on: 7/31/2017 3:33:00 PM

1 of 1

Img. 1.5.79: Preview – Payment Category Overview

### 14. Families and Insurees Overview report

The report provides an overview of enrolled families/groups and their members in specified location within the specified period. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Families and Insurees Overview. (Img. 1.5.80)

### 15. Percentage of Referrals report



Go back to selector.

1 of 2 Find | Next

### Families and Insurees Overview

Region : TestRegion | District : TestDistrict1 | Period From 01/01/2017 To 31/07/2017

Insurance Number	Name	Enrol Date	Status
Region : TestRegion			
District : TestDistrict1			
Municipality : TestMunicipality11			
Village : TestVillage111			
111111111	Gatsby John	09/05/2017	Idle
111111112	Gatsby Elis	09/05/2017	
111111121	Bock John	30/07/2017	Idle
111111122	Bock Elly	10/05/2017	
111111123	Bock James	10/05/2017	
111111124	Bock Julia	10/05/2017	
111111125	Bockwurst Peter	10/05/2017	
777888983	Pappen Luisa	30/07/2017	
00001	Soni Hiren	15/05/2017	Idle
000011	Soni Nisha	15/05/2017	
000012	Soni Pooja	15/05/2017	
000013	Hindocha Dhyey	15/05/2017	
00002	Obed Rogers	17/05/2017	Idle
111111131	Glenn Gilmour	17/05/2017	Active
111111132	Glenn Julia	17/05/2017	
111111133	Glenn John	17/05/2017	
111111141	Fuchs Konrad	22/05/2017	Active
111111142	Fuchs Elis	22/05/2017	
111111143	Fuchs Jane	22/05/2017	

Img. 1.5.80: Preview – Families and Insurees Overview Report

The report lists all primary health care facilities (the category is Dispensary and Health Centre) in the selected district and for each such health facilities provides the following indicators:

- The number of visits (claims) of the primary health care facility in the selected period.
- The number of out-patient visits that have Visit Type equal to Referral in all other health facilities (irrespective of the district) for insurees with the First Service Point in the respective primary health care facility.
- The number of in-patient stays that have Visit Type equal to Referral in all health facilities-hospitals (irrespective of the district) for insurees with the First Service Point in the respective primary health care facility.

The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Percentage of Referrals. (Img. 1.5.81)

Go back to selector.

1 of 1 Find | Next

### Percentage of Referrals

Region : TestRegion | District : TestDistrict1 | Period From 01/06/2017 To 31/07/2017

Health Facility	Total Claims	Referral(OP)	Referral(IP)
HF02 - District1 health Center	2		

Percentage of Referrals - Printed on: 7/31/2017 4:29:00 PM 1 of 1

Img. 1.5.81: Preview – Percentage of Referrals Overview Report

## 16. Pending Insurees report

The report lists all insurees whose photos have been sent to openIMIS but who has no record in openIMIS yet. The report can be run by users with the system role Accountant

or with a role including an access to Tools/Reports/Pending Insurees. (Img. 1.5.82)

Go back to selector.

1 of 1 Find | Next

**Pending Insurees**

Region : TestRegion | District : TestDistrict1 | Period From 01/06/2017 To 31/07/2017

Insurance Number	Photo Date
Enrollment Officer - E001 : Fox James (Active)	
33333333	03/07/2017
44444444	03/07/2017
44455566	06/07/2017

Total Insurees : 3

Total Insurees : 3

Pending Insurees - Printed on: 7/31/2017 4:32:40 PM

1 of 1

Img. 1.5.82: Preview – Pending Insurees Report

## 17. Renewals report

The report lists all renewed policies in given period for given insurance product and optionally for given enrolment officer. The families that have at least one payment of contributions in given period of time are included in the report. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Renewals. Below is an example of the report (Img. 1.5.83)

Go back to selector.

1 of 1 Find | Next

**Renewals**

Product: RF01 - Regional free | Region : TestRegion | District : TestDistrict1 | Period From 01/06/2017 To 31/07/2017

Enrolment Officers Code	Enrolment Officer	Municipality	Village	Insurance Number	Insuree	Renewal Date	Receipt No.	Payers
E001	James Fox	TestMunicipality11	TestVillage111	555444331	Jack Fox	23/07/2017	sdcl	

Renewals - Printed on: 7/31/2017 4:36:04 PM

Img. 1.5.83: Preview – Renewals Report

## 18. Capitation Payment Report

The report lists capitation payments for all health facilities specified in the *capitation formula* for specified month and for given insurance product. The report can be run by users with the system role Accountant or with a role including an access to Tools/Reports/Capitation Payment. (Img. 1.5.84)

## 1.5.6 Utilities

Access to the **Utilities** is restricted to the users with the role of openIMIS Administrator.

The **Utilities** is the place for database administration. By having access to this page, it is possible to backup and restore the openIMIS operational database and also to execute SQL Scripts (patches provided for maintenance or update of the database). At the top of the page, the current “Backend” version is displayed for reference.

### Navigation

All functionality for use with the administration of utilities can be found under the main menu **Tools**, sub menu **Utilities**

**Go back to selector.**

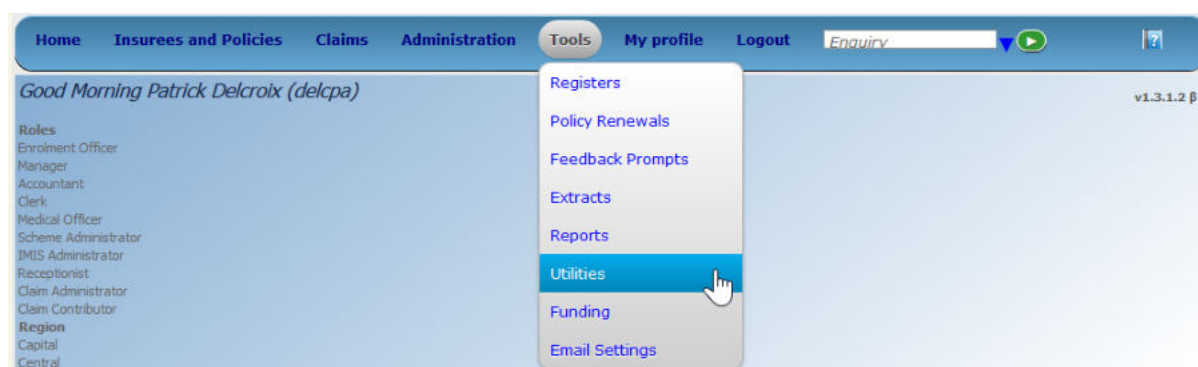
**Capitation Payment**

Region: TestRegionY, Product: RY001 - Regional free Y , Month: October, Year: 2017

Level 1 Health Centre	Level 2 Dispensary	Level 3	Level 4						
Sub Level 1	Sub Level 2	Sub Level 3	Sub Level 4						
Weight of Number of Families 10		Weight of Number of Insured Families 20		Weight of Number of Visits 20		Share of Contribution 60			
Weight of Population 10		Weight of Insured Population 20		Weight of Adjusted Amount 20					
HF Code	HF Name	Account Code	Population	Number of Families	Number of Insured Population	Number of Insured Families	Number of Claims	Adjusted Amount	Capitation Payment
<b>TestRegionY</b>									
<b>TestDistrictY1</b>									
HFY2	District health centre Y 1		3,020.00	50.00	5.00	2.00	2.00	5,100.00	292,405.64
HFY3	District health centre Y 2		1,400.00	30.00	2.00	1.00	2.00	5,000.00	185,687.64
<b>District Total</b>			<b>4,420.00</b>	<b>80.00</b>	<b>7.00</b>	<b>3.00</b>	<b>4.00</b>	<b>10,100.00</b>	<b>478,093.28</b>
<b>TestDistrictY2</b>									
HFY4D	Dispensary Y 1	AHFY4D	5,000.00	50.00	5.00	2.00	4.00	10,200.00	402,125.70
HFY5D	Dispensary Y 5	AHFY5D	1,400.00	30.00	2.00	1.00	1.00	2,500.00	140,615.70
<b>District Total</b>			<b>6,400.00</b>	<b>80.00</b>	<b>7.00</b>	<b>3.00</b>	<b>5.00</b>	<b>12,700.00</b>	<b>542,741.40</b>
<b>Region Total</b>			<b>10,820.00</b>	<b>160.00</b>	<b>14.00</b>	<b>6.00</b>	<b>9.00</b>	<b>22,800.00</b>	<b>1,020,834.68</b>
<b>Allocated Contribution</b>			<b>102,083.47</b>	<b>102,083.47</b>	<b>204,166.94</b>	<b>204,166.94</b>	<b>204,166.94</b>	<b>204,166.94</b>	
<b>Unit Price</b>			<b>9.43</b>	<b>638.02</b>	<b>14,583.35</b>	<b>34,027.82</b>	<b>22,685.22</b>	<b>8.95</b>	
IMIS - Report Printed on: 10/18/2017 11:26:37 AM									

1 of 1

Img. 1.5.84: Preview –Capitation Payment Report



Img. 1.5.85: Navigation Utilities

Clicking on the sub menu **Utilities** re-directs the current user to the *Utilities Page*.

Img. 1.5.86: *Utilities Page*

### Backup

Backup utility can be found in the top panel of the *Utilities Page*. By default the path of the backup folder will be populated from the default table. User can change the path according to the requirement. Next to the textbox user can see one check box called **Save Path**. If user wants to update the backup folder in default table then this check box should be in checked state. Otherwise system will take the backup on the folder assigned by the user but it will not be updated in database. So next time when user comes on the *Utilities Page*, the textbox will be populated with the original path. After the path has been entered user can just click on the **Backup** button to start the process and a progress bar will be appeared on the screen. Users are requested to be patient while the system performs the task.



Img. 1.5.87: *Backup is in progress*

### Restore

Restore utility can be found in the second panel of the *Utilities Page*. User will have to put the path of the backup file to be restored. After the path has been entered user can just click on the **Restore** button to start the process and a progress bar will be appeared on the screen. Users are requested to be patient while the system performs the task.

### Execute scrip

Execute script can be found in the third panel of the *Utilities Page*. User will have to choose the script by clicking on the browse button. User will have to select the file only with the *.isf*



Img. 1.5.88: *Backup is in progress*

extension. After the file has been chosen, user can just click on the **Execute** button to run the script. Users are requested to be patient while the system is executing the script. After the script is executed successfully, backed version will be updated to the latest version. If user will try to run the lower or the equal version's script then system will prompt the user with the appropriate message

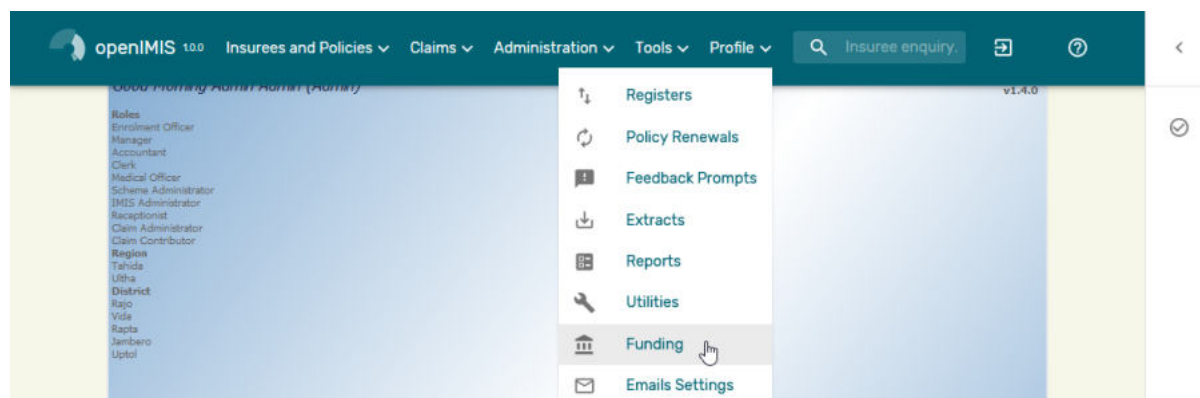
### 1.5.7 Funding

Access to the **Funding** is restricted to the users with the system role of Accountant or with a role including an access to Tools/Funding.

The **Funding** is the place where funding from external authorities (payers) can be entered. openIMIS creates internally one fictive family/group (the insurance number of the head of the fictive family/group is 999999999, the name is *Funding* and the other name is *Funding* as well) for the district for which a funding is done. Each entering of a fund results in creation of a fictive policy for the corresponding fictive family/group with paid contribution in the amount of the funding. The fictive policy is active since the date of payment of the corresponding fund. These fictive policies are overpaid as these funds are usually much higher than the contribution rate for a single family/member of the group but it doesn't matter. External funding corresponds to payment of contributions for many families/members of the group in some period. openIMIS can regard funds as standard contributions and its standard functionality can be used for handling of funds. One distinctive feature of payment of funds by means of the fictive policies is that the payments of funds don't appear in the reports on matching funds generated for funding authorities. So, there is no danger that offices of the scheme administration would acquire new funds based on funding already acquired.

#### Navigation

The functionality for entering of funds can be found under the main menu **Tools**, sub menu **Funding**

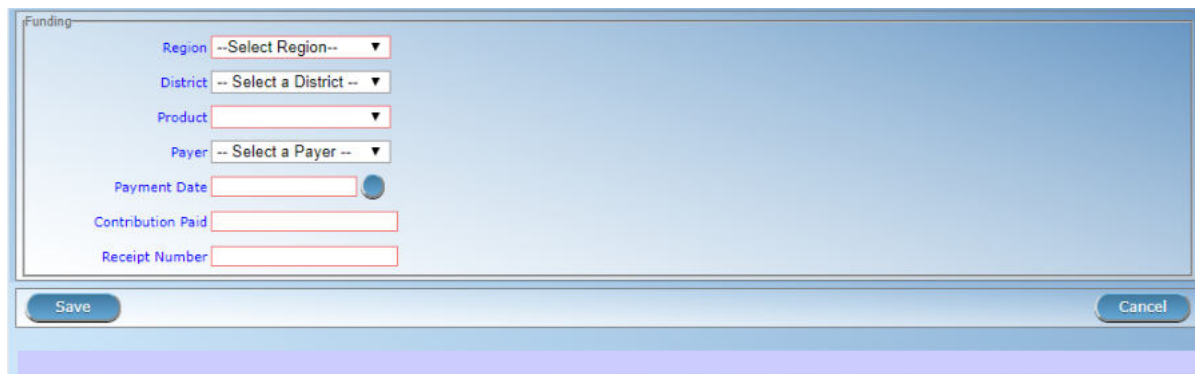


Img. 1.5.89: *Navigation Funding*

Clicking on the sub menu **Funding** re-directs the current user to the *Funding Page*.

## Funding Page

### 1. Data Entry



Img. 1.5.90: *Funding Page*

- **Region**

Select the region from the list of regions for which the funding is designated by clicking on the arrow on the right of the selector. *Note: The list will only be filled with the regions assigned to the current logged in user.*

- **District**

Select the district from the list of districts for which the funding is designated. by clicking on the arrow on the right of the selector. *Note: The list will only be filled with the districts belonging to the selected region and assigned to the current logged in user.*

- **Product**

Select an insurance product from the list of insurance products purchased in the selected district (including national insurance products) for which the funding is designated.

- **Payer**

Select from the list of institutional payers the funding authority/agency.

- **Payment Date**

Enter the date of receiving of the funding.

- **Contribution Paid**

Enter the amount of the funding.

- **Receipt Number**

Enter an identification of the document accompanying the funding.

### 2. Saving

Once all mandatory data is entered, clicking on the **Save** button will save the record. A message confirming that the new password has been saved will appear. The user will be re-directed back to the *Home Page*.

### 3. Mandatory data

If mandatory data is not entered at the time the user clicks the **Save** button, a message will appear in the Information Panel, and the data field will take the focus (by an asterisk on the right side of the corresponding field). The user will be re-directed to the *Home Page*.

#### 4. Cancel

By clicking on the Cancel button, the user will be re-directed to the *Home Page*.

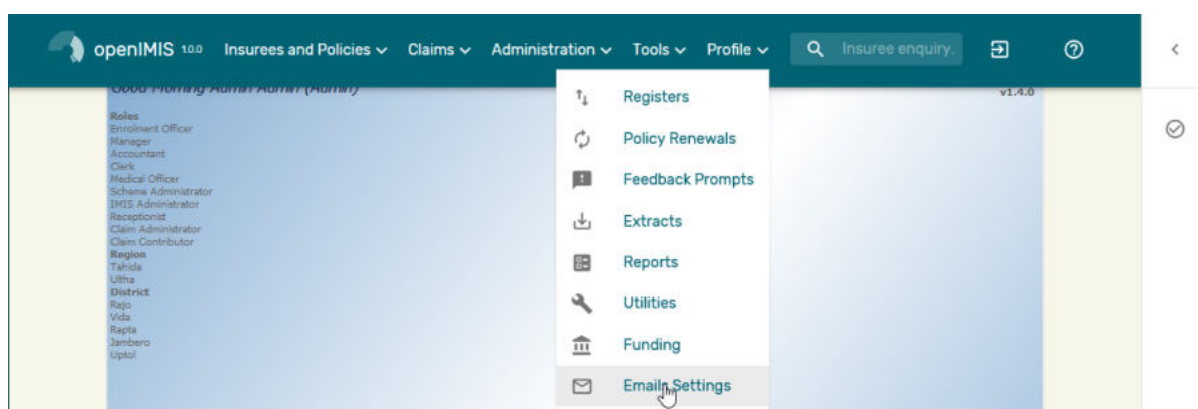
### 1.5.8 Email Settings

Access to the **Email Settings** is restricted to the users with the role of Accountant.

The **Email Settings** is the page where the setting of the outbound email server are entered.

#### Navigation

The functionality for entering of funds can be found under the main menu **Tools**, sub menu **Email Settings**



Img. 1.5.91: *Navigation Email Settings*

Clicking on the sub menu **Email Settings** re-directs the current user to the *Email settings Page*.

#### Email settings page

##### 1. Data Entry

Img. 1.5.92: *Email settings Page*

- **Email**

SMTP Login to be used on the email server in order to send email

- **Password**

SMTP password to be used on the email server in order to send email.

- **SMTP Host**

SMTP email server address or IP



- Port

SMTP email server IP port, standard port are

- 25 when no encryption is used
- 465 when implicit encryption is used(depreciated)
- 587 when explicit encryption is used, see **Enable SSL**

- Enable SSL

Check to box if the SMTP mail server require encryption

## 1.6 Offline mode

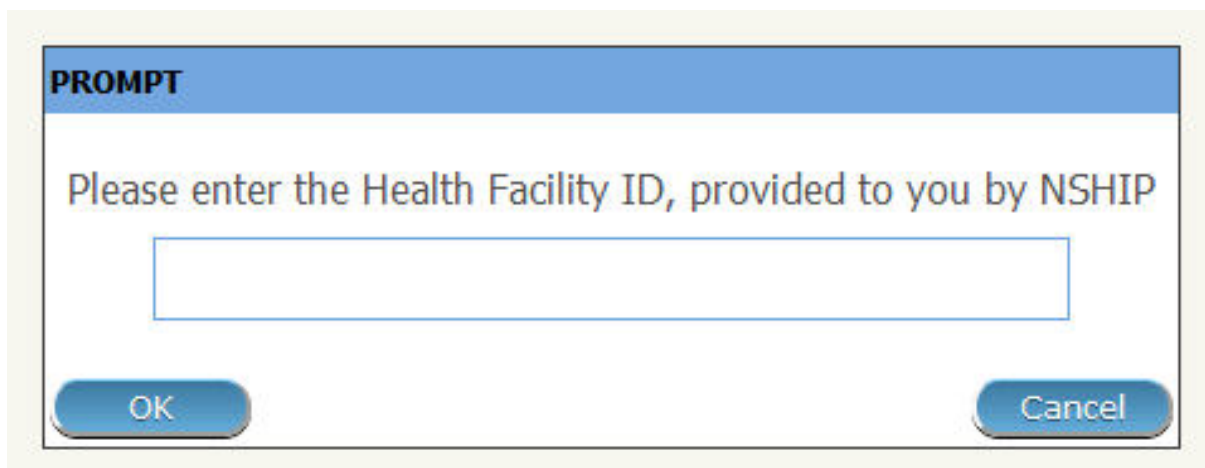
IMIS system can be used in offline mode, which makes it possible for usage by health facilities (HF) and scheme administration offices with low/no internet connectivity.

### 1.6.1 Offline Facilities

Facilities available while offline and online in IMIS, are similar with some few differences. The following are the feature wise differences found while using openIMIS in offline mode.

#### 1. Login

If a user who is logging in is having user role HF Administrator or offline Scheme Administrator and if Heath Facility ID/Scheme Office ID is not set yet, just after clicking login button on the login screen/page, the user will be prompted to enter Health Facility/Scheme Office ID ([Img. 1.6.1](#)), ([Img. 1.6.2](#)), only once for that very first time of logging in.

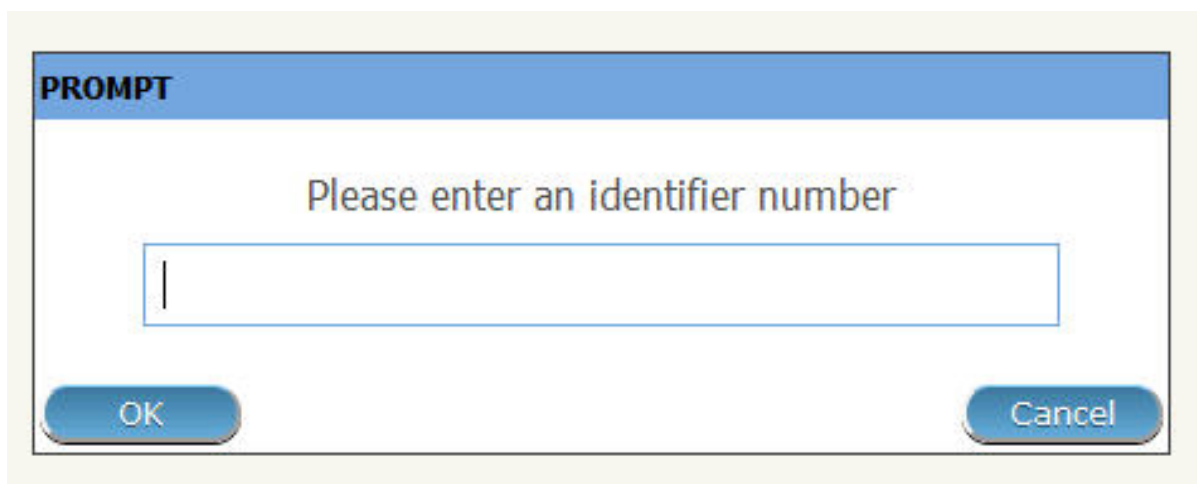


Img. 1.6.1: Enter HF ID - HF Administrator Login, openIMIS offline

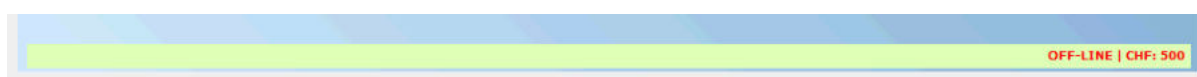
#### 2. Information bar

Throughout the application, an information bar at the bottom of each page will have a different background colour to that of online openIMIS and on the its right end, there will be shown heath facility code and health facility name / Scheme Office ID submitted ([Img. 1.6.3](#)), ([Img. 1.6.4](#)).

#### 3. Menu Access



Img. 1.6.2: Enter Scheme Office ID - offline Scheme Administrator Login, openIMIS offline



Img. 1.6.3: Information Bar – Scheme Office, openIMIS offline

For all users with roles other than HF Administrator and Offline Scheme Administrator, will have the menus available to them as per normal roles' rights in online openIMIS version. Menu access in the offline version is different in following scenarios:

User with roles HF Administrator and Offline Scheme Administrator can access only **Users**, **IMIS Extracts** and **Utilities** menus, while all other users with different roles can access menus just as they would do in the online openIMIS version.

- **Extracts**

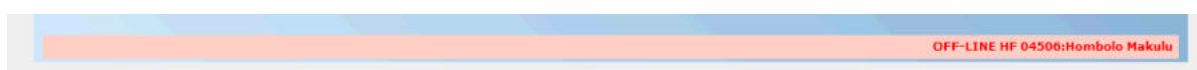
Extracts Menu leads an offline user to Extracts control panel. Using this panel, an offline user with rights to this panel can import data from online openIMIS to the local offline IMIS, and can also download claims and enrolments prior to upload them to the online IMIS. This panel is divided into five sections (Img. 1.6.5), (Img. 1.6.6) If an offline user is HF Administrator, section C will contain facility to **Download Claims**. If an offline user is Offline Scheme Administrator, section C will contain facility to **Download Enrolments**

- **section a - import extract**

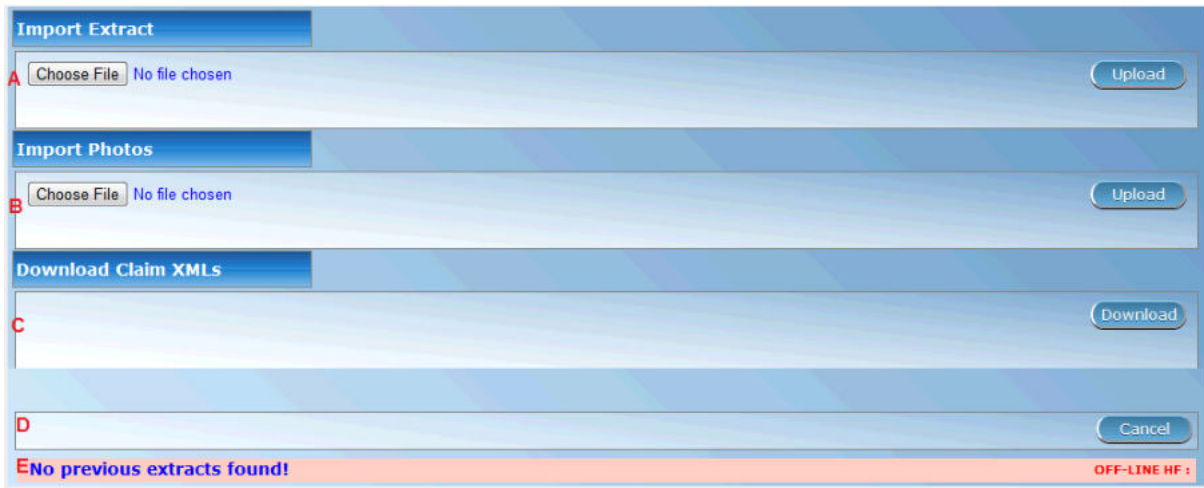
This section has a facility to enable synchronization of online openIMIS data with that offline openIMIS data. When online data in a zipped file is obtained (downloaded extraction) from online openIMIS to user local computer, user will use this section to put that data into offline IMIS.

User has to select a file from a local computer by clicking the 'select file' button on the left side of the section, and in the popup window which appears (Img. 1.6.6) user can navigate to the required file and select the file.

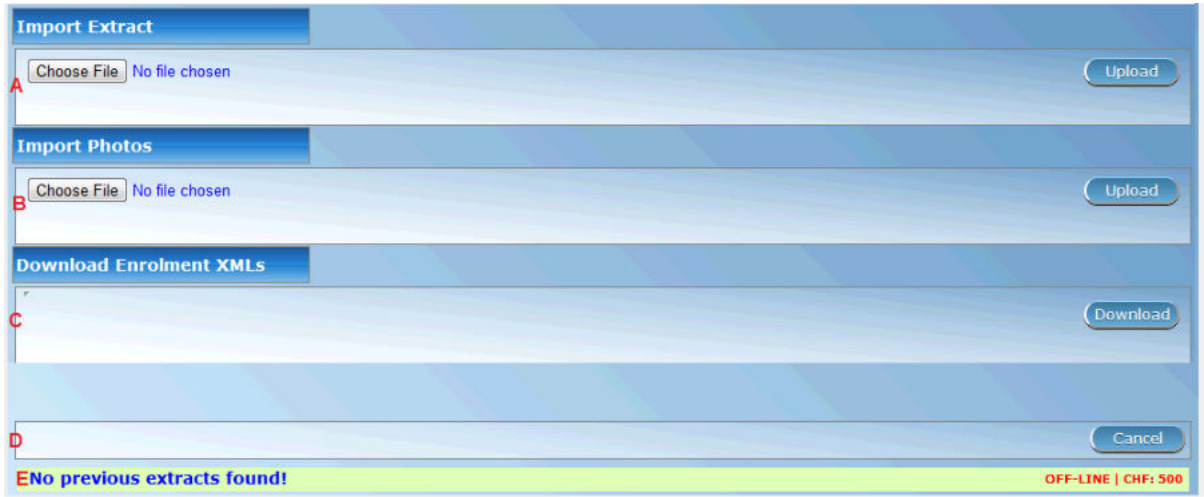
After clicking the upload button on the very end of right hand side in this section, data in the file will be imported to the offline openIMIS and confirmation will be given as popup messages (Img. 1.6.7), (Img. 1.6.8).



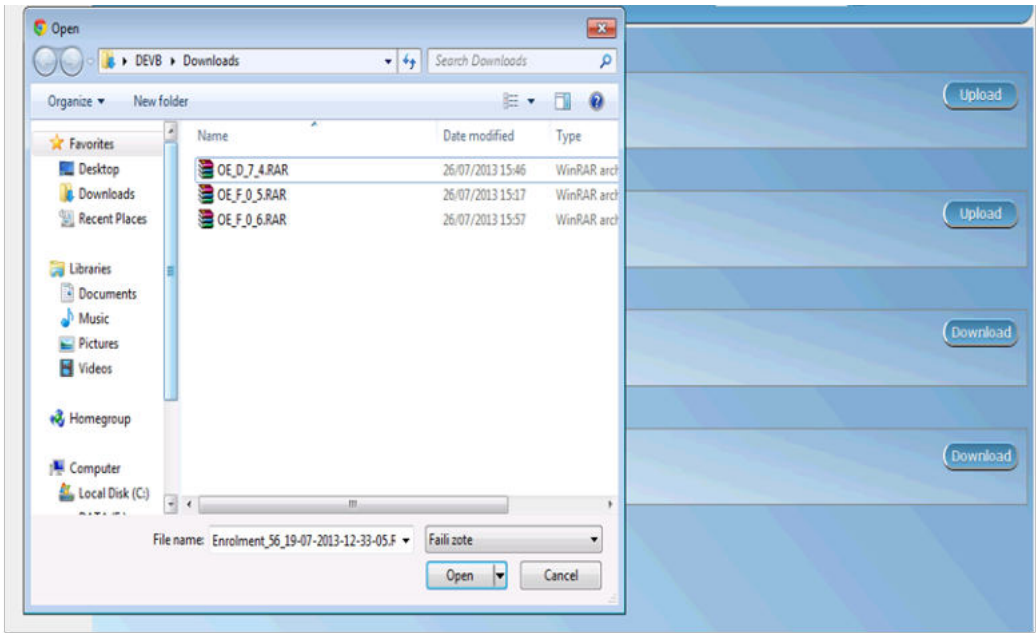
Img. 1.6.4: Information Bar - Health Facility, openIMIS offline



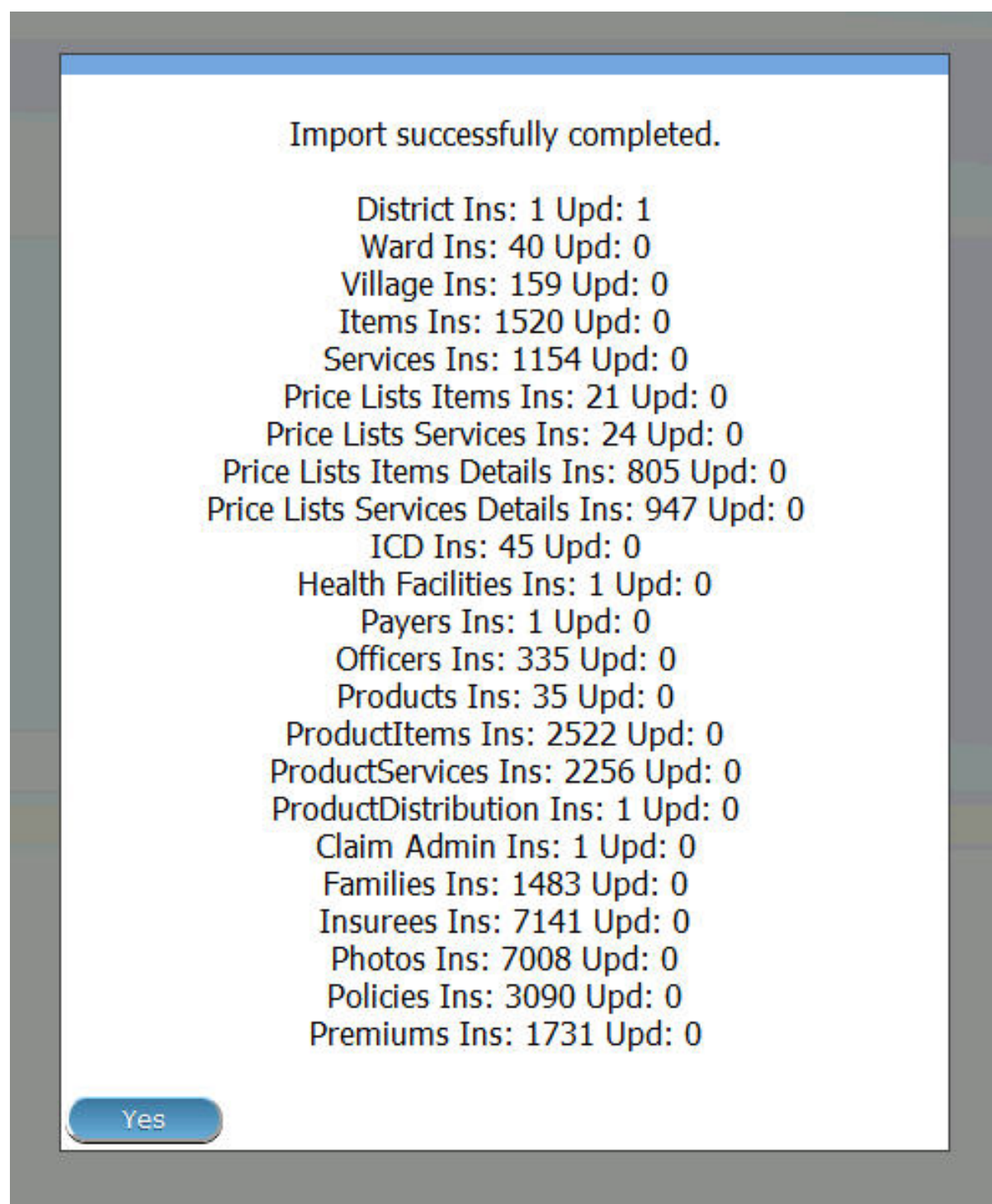
Img. 1.6.5: *Extracts Control Page, HF Administrator, openIMIS offline*



Img. 1.6.6: *Extracts Control Page, Offline Scheme Administrator, openIMIS offline*



Img. 1.6.7: *Select File Popup Window, Import Extracts, openIMIS offline*



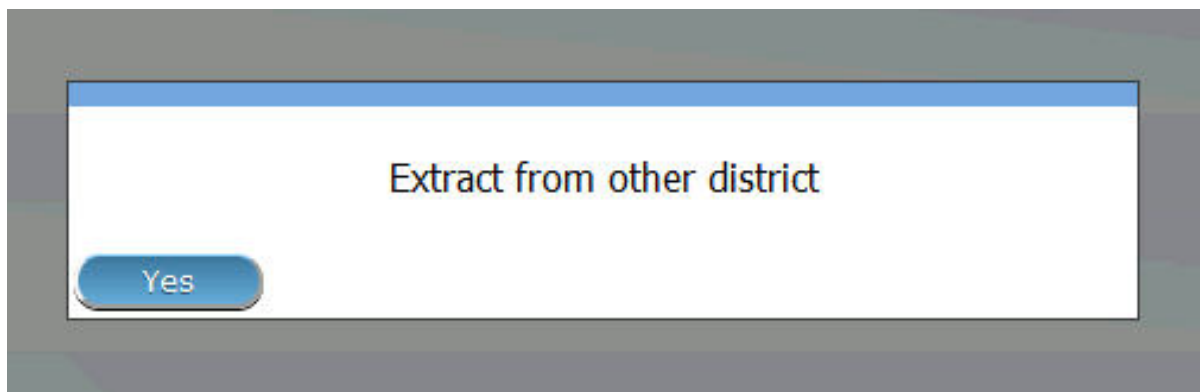
Img. 1.6.8: *Popup Window, Import Extracts, HF Administrator, openIMIS offline*



Img. 1.6.9: *Popup Window, Import Extracts, Offline Scheme Administrator, openIMIS offline*



User cannot import an extract whose sequence number is same as last one imported; if done so, a popup message (Img. 1.6.10) will be shown.

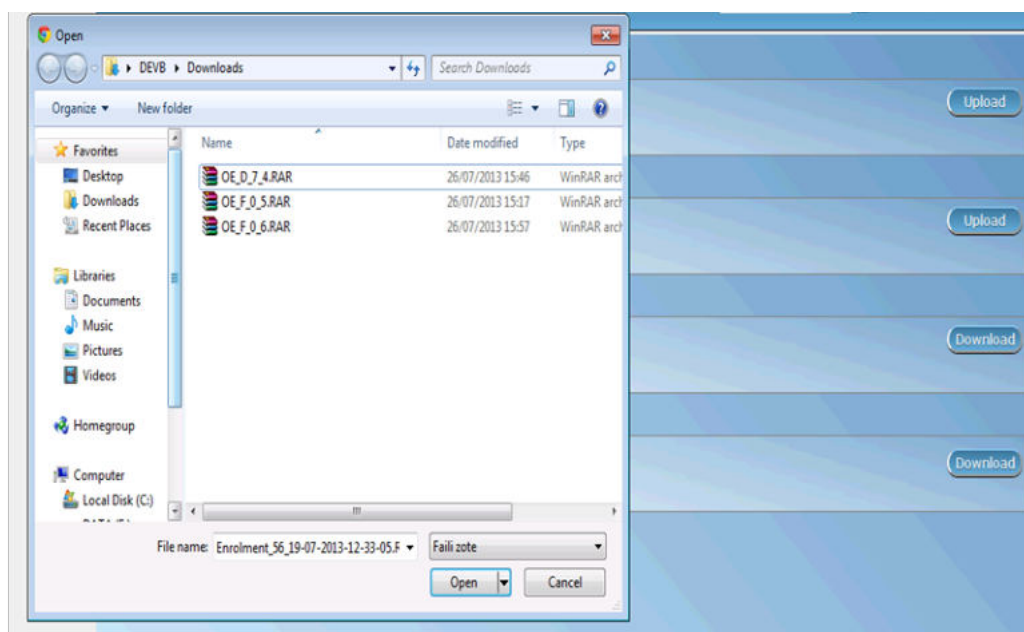


Img. 1.6.10: *Popup Window, Wrong sequence of an extract file, openIMIS offline*

- section b - import photos

Just as the section name implies, this is a section with facility to enable a user synchronize insurees' photos in online IMIS, with insurees' photos in offline IMIS. When online insurees' photos in a zipped file is obtained from online openIMIS to user local computer, user will use this section to put those photos into offline IMIS.

User has to select a file from a local computer by clicking the 'select file' button on the left side of the section, and in the popup window which appears (Img. 1.6.11), user can navigate to the required file and select the file.

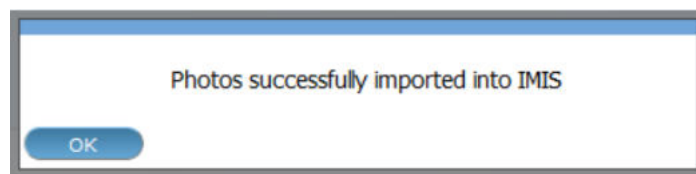


Img. 1.6.11: *Select File Popup Window, Import Photos, openIMIS offline*

After clicking the upload button on the very end of right hand side in this section, data in the file will be imported to the offline openIMIS and confirmation will be given as popup messages (Img. 1.6.11).

If importation of photo is not done due to some reason, the above popup message will not be shown, instead system will issue proper popup message to notify a user what went wrong and what is to be done.

- section c - download claim xmls

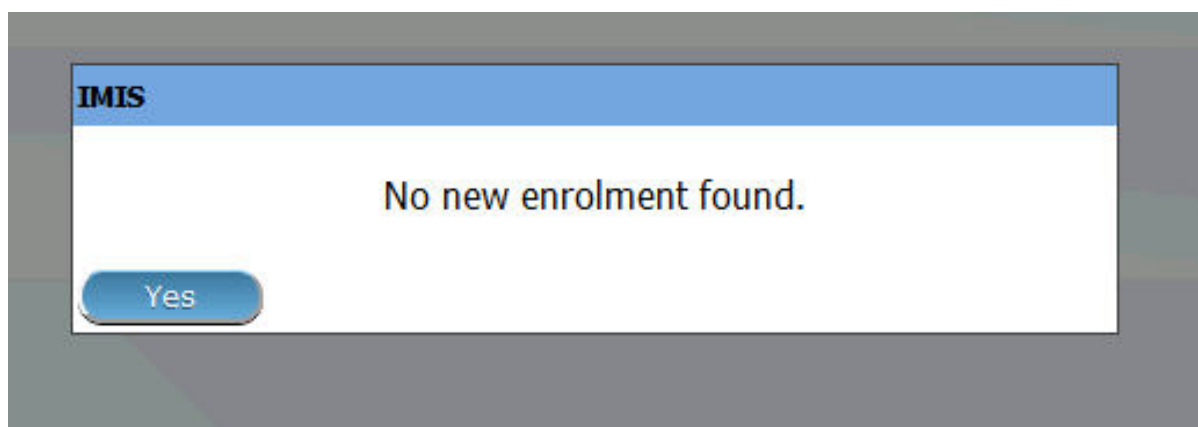


Img. 1.6.12: *Popup Window, Import Photos, openIMIS offline*

This section has facility to enable offline HF Administrator download to a zipped file all offline claims. By clicking the download button on the right hand side, the user initiate download process and all offline claims will be downloaded to a default downloads folder in user's local computer or a prompt of 'where to save file' will be displayed by browser'. User can navigate through folder in his/her local computer to find the file downloaded. If no new claims found, a message will be displayed.

- **download enrolment xmls**

This section has facility to enable Offline Scheme Administrator download to a zipped file all offline enrollments of families, insurees, policies and contributions. By clicking the download button on the right hand side, the user initiate download process. If no enrolment found, a popup message box (Img. 1.6.12) will appear, notifying the user. Otherwise enrollments will be downloaded in a zipped file and a confirmation popup message (Img. 1.6.14) will appear



Img. 1.6.13: *Popup Window, Download Enrolments, openIMIS offline*

- **section d - buttons**

This section has a cancel button, which when clicked will take the current user to the Home page.

- **section e - information bar**

Information bar at the bottom will show different notification messages in blue color depending on the actions of the user. Such actions and messages may be:

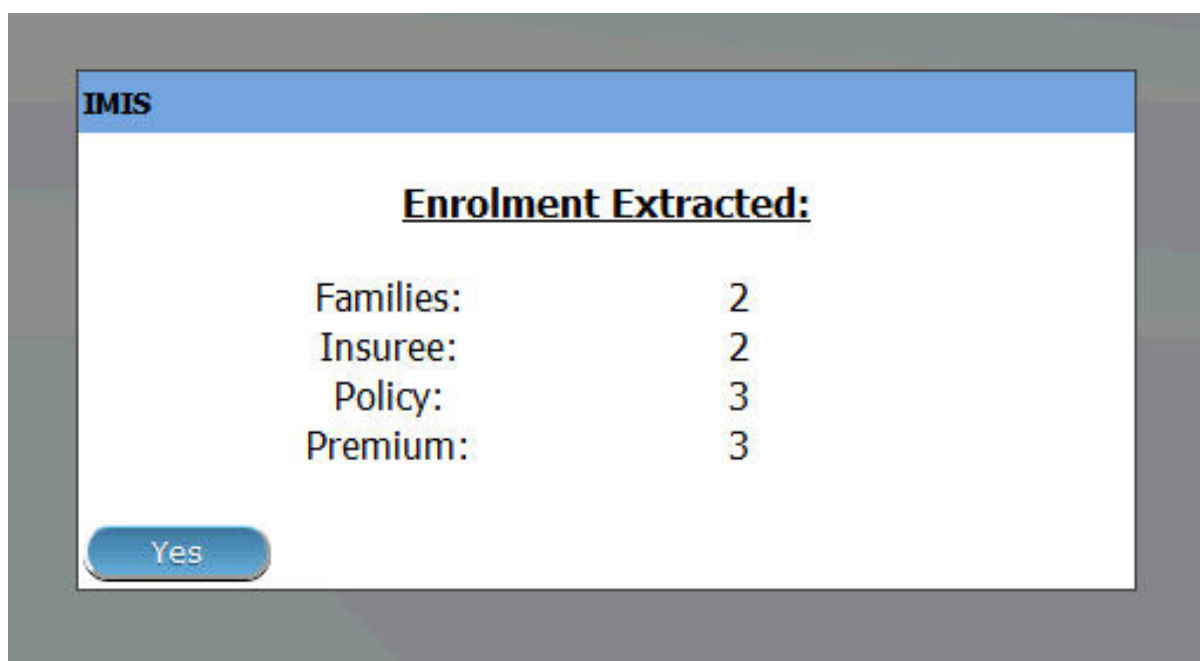
- a) No Previous Extract Found

This message is seen at the first time when using the system and no any extract has been imported into the offline IMIS

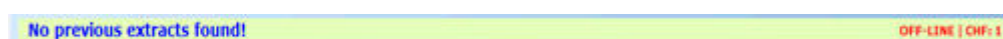
- b) Last Extract Sequence: <Sequence Number>

This message is seen, after a single / series of extract importation have been made to the offline openIMIS and that much times will be shown as a sequence number at the end of the message. This enables proper tracking of right extracts to import and use.





Img. 1.6.14: *Popup Window, Download Enrolments, openIMIS offline*



Img. 1.6.15: *openIMIS Extracts, Information Bar, openIMIS offline*



Img. 1.6.16: *openIMIS Extracts, Information Bar, openIMIS offline*

## c) No claims Found

When HF offline openIMIS user is downloading offline claims and no new offline claims is found, this message is displayed.

No claims found.

OFF-LINE HF 00947:Miremba Referral

Img. 1.6.17: *openIMIS Extracts, Information Bar, openIMIS offline*

#### 4. User

Users with role HF Administrator, can create only users with roles: **Receptionist**, **Claim Administrator** and **HF Administrator** (Img. 1.6.18). User with role 'offline NSHIP Administrator', can create only user with role: **Clerk** (Img. 1.6.19).

User Details

Language: English

Last Name: Admin

Other Names: Admin

Phone Number:

Login Name: Admin

Password: .....

Confirm Password: .....

Health Facility:

Check All

Role

ROLE
<input type="checkbox"/> Receptionist
<input type="checkbox"/> Claim Administrator
<input checked="" type="checkbox"/> HF Administrator

Check All

District

DISTRICT
<input checked="" type="checkbox"/> Dummy

Img. 1.6.18: *Users Page - HF Administrator, openIMIS offline*

User Details

Language: English

Last Name: Admin

Other Names: Admin

Phone Number:

Login Name: Admin

Password: .....

Confirm Password: .....

Health Facility:

Check All

Role

ROLE
<input type="checkbox"/> CHF Clerk

Check All

District

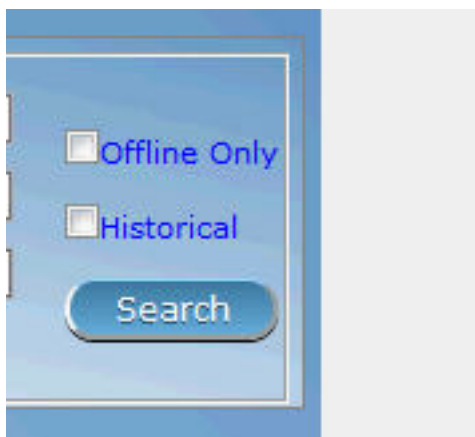
DISTRICT
<input checked="" type="checkbox"/> Dummy

Img. 1.6.19: *Users Page - Offline Scheme Administrator, openIMIS offline*

#### 5. data access

- Search / Find

In all pages in **Insurees** and **Policies** menus with search / find acility, there will be an extra search criteria (Img. 1.6.20) to enable search for offline data only. This feature is available if a user is in Offline IMIS.



Img. 1.6.20: *Search Criteria - offline only data, openIMIS offline*

- Create / Edit

Only families, insurees, policies and contributions created/edited while offline, will be available for further manipulation. An online data is available for viewing purposes.

For an offline user with a right to open **Insurees** and **Policies** menus, he/she can access all data but can manipulate only that data which was created offline. The rest of the data will be available in read-only mode