openIMIS Documentation

openIMIS team

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Welcome to the openIMIS technical documentation repository.

Minimum requirements

v1.2.0 and later

- Windows Server 2012 R2
- 4 CPUs
- 8GB RAM
- 300GB Hard drive
- Administrator privileges

Database installation guide

v1.2.0 and later

2.1 Install SQL Server

Note: This installation guide is based on SQL Server 2017.

Download the desired version of SQL Server (for example, the Express version from https://www.microsoft.com/ en-us/sql-server/sql-server-downloads).

Open the setup file. Select New Installation or add feature to an existing installation.

On the Features selection:

- In Shared Feature section, select SQL Client Connectivity SDK
- For installations with Data Warehouse, select Analysis Services, Reporting Services and Integration Services (not available for the Express edition)

On the Instance configuration, the default name (SQLEXPRESS) can be used, unless it is already used by another instance.

On Database engine configuration, select Mixed Mode (SQL Server authentication and Windows authentication) in Authentication Mode.

Continue the setup process until the installation is complete.

2.2 Configure SQL Server

Open the SQL Server Configuration Manager

- On the left panel, select SQL Server Network Configuration → Protocols for SQLEXPRESS (or the name of your SQL Server instance) → Enable Named Pipes and TCP/IP
- Select SQL Server Services \rightarrow right click on SQL server (instance name) and select Restart

2.3 Initialise openIMIS database

To facilitate the setting up of the openIMIS database, it is suggested to install SQL Server Management Studio (SSMS). The following procedure is based on SSMS, but you can use the standard SQL Server prompt to proceed with the setup.

First, download the openIMIS database backup files and migration scripts from Github repository (the source code ZIP file).

In SQL Server Management Studio:

- Restore the initial database provided in the release sources. Choose the database to restore based on your context. There are 3 types of databases (structurally identical, but they are pre-configured differently):
 - Online: this is the default choice when deploying a central online server
 - Offline: this mode is sometime used for remote insurance offices without connectivity. Note: the synchronisation of data with the central server is manual.
 - Offline HF: this database can be used in remote health facilities without connectivity. Note: the synchronisation of data with the central server is manual.
- In the Object Explorer: openIMIS (the openIMIS db name) \rightarrow Programmability \rightarrow Stored Procedures \rightarrow dbo.SETUP-IMIS
- Right click on the dbo.SETUP-IMIS and execute the procedure. The result returned from the procedure should be 0.

Create a dedicated user with full privilege on the openIMIS database only:

- In the Security \rightarrow Logins \rightarrow right click and select "New Login..."
- In General page:
 - Give a login name (i.e. ImisUser)
 - Select SQL Server authentication and provide a password
 - Unselect Enforce password expiration
 - Change default database to openIMIS
- In User Mapping page:
 - Map IMIS db to ImisUser user
 - Give the role of db_owner

2.4 Upgrade the openIMIS database

If an existing openIMIS database exists already, follow the next steps to upgrade it to the desired version:

- Download the openIMIS database backup files and migration scripts from Github repository (the source code ZIP file).
- In SQL Server Management Studio, run the migration script on the openIMIS database.

Web application installation guide

v1.2.0 and later

3.1 Install IIS

Follow these steps to install IIS:

- In the Server manager \rightarrow Dashboard \rightarrow Add Roles and Features
- · Select Role-based or feature-based installation
- Select your server from the server pool, and select your server from the list
- In Server Roles \rightarrow select Web Server (IIS) \rightarrow Add Features
- In Features
 - Select .NET Framework 3.5
 - Select .NET Framework 4.6 and ASP.NET 4.6
- In Web Server Role (IIS) \rightarrow Role Services
 - In Web Server, ensure that Common HTTP Features \rightarrow Static Content is ticked
 - In Application Development, select .NET Extensibility, ASP, ASP.NET, ISAPI Extensions, ISAPI Filters and Websocket Protocol
 - Management tools -> Tick all boxes
- Click on Install and wait for the features to be installed.
- Restart the server if required

3.2 Copy openIMIS Web Application

Download and unzip the release from Github web_app_vb repository (https://github.com/openimis/web_app_vb/ releases/latest) into a new folder under the IIS wwwroot (For example C:\inetpub\wwwroot\openIMIS).

3.3 Configure IIS

The configuration of IIS done through Internet Information Service (IIS) Manager.

3.3.1 Add a site

In Internet Information Service (IIS) manager:

- Select your server name \rightarrow Sites
- Remove the Default Web Site (if new installation)
- Right click on Sites \rightarrow Add Website
- Enter a site name for your openIMIS instance (i.e. openIMIS.X.Y.Z)
- Enter or select the physical path name: C:\inetpub\wwwroot\openIMIS (unless you have installed IIS somewhere else)
- If you have a SSL certificate, select binding type to HTTPS (port 443) and select your certificate, if not select binding type to HTTP (port 80)

If you have selected the binding type to HTTPS (port 443), then you will have to add also the binding type for HTTP:

- Right click on the new added website
- Select Edit Bindings
- Select binding type http (port 80) and click ok

3.3.2 Globalisation

Depending on the server's initial configuration, the date format may differ from the expected DD/mm/YYYY. To force the date format, go to the openIMIS site, then select .NET Globalisation Under Culture, and select English (United Kingdom) (en-GB) as a culture.

3.4 Configure openIMIS Web Application

3.4.1 Edit the web.config

The web.config provides the configuration for openIMIS Web Application, including database connection string and necessary folders.

To configure the database connection string, go in openIMIS root folder (usually C:\inetpub\wwwroot\openIMIS), locate the web.config file and edit "IMISConnectionString", so that the connection string points to the database created in openIMIS database section with the right credentials. For example:

Other configuration settings can be found within the appSettings tag and should be modified with caution.

3.4.2 Assign permission to source folders

In the source files (usually C:\inetpub\wwwroot\openIMIS), IIS_IUSRS need to be given full control of the following folders:

Archive

1

2

- Extracts
- FromPhone
- Images
- Workspace

Repeat the following steps for each folder listed above:

- Right click on the folder and select properties
- · Select the Security tab
- · Click on Edit
- Select IIS_IUSRS and allow full control (in the below section).
- Then apply and click OK.

3.4.3 Edit permissions to Windows event logs

Click on the Windows Start menu of run "regedit" via the search box:

- In the Registry Editor, select HKEY_LOCAL_MACHINE \rightarrow System \rightarrow CurrentControlSet \rightarrow Services \rightarrow Eventlog
- Right click on the EventLog Node, select Permission. Give full permissions to IIS_IUSRS, as described in the above paragraph (Assign permission to source folders)
- Now repeat the same steps for Eventlog \rightarrow Security node, as it can be required depending on the server's environment

3.5 Open the application

Open your Internet browser and type the following URL in the browser address bar http://localhost/

You can connect with the admin default credentials:

- Login name: Admin
- Password: Admin

Web service installation guide

v1.2.0 and later

4.1 Prerequisites

In order to install openIMIS Web Services, you need first to install openIMIS Database and Web Application. If not yet installed please follow the steps from the database and web application installation guides.

4.2 Copy openIMIS Web Services

Download and unzip the release from Github web_service_vb repository (https://github.com/openimis/web_service_vb/releases/latest) in a new folder (openIMIS.WS.X.Y.Z) under the IIS wwwroot (usually in C:\inetpub\wwwroot).

4.3 Configure openIMIS Web Services in IIS

In Internet Information Service (IIS) Manager, right click on the previous added IMIS site and select Add application. Fill in the form as follows:

- Alias: Services (mandatory for the mobile apps)
- Physical Path: The path of the Services Folder in the sources (usually C:\inetpub\wwwroot\openIMIS.WS.X.Y.Z)

4.4 Configure openIMIS Web services

Edit the web.config:

- Similarly, the Web services needs that the database connection string to be updated
- In the services source files (usually C:\inetpub\wwwroot\openIMIS.WS.X.Y.Z), locate the file "web.config" and edit it accordingly. For example:

```
1
2
3
```

4

• -Important note-: the name attribute must remain "CHF_CENTRALConnectionString"

Windows services installation guide

v1.2.0 and later

5.1 Install and configure openIMIS Policy Renewal service

To install the Policy Renewal service, proceed as follow:

- Download and unzip the installation setup from https://github.com/openimis/policy_renewal_service_vb/ releases/latest
- Double click on the setup file
- Select the installation path (for example C:\Program Files\openIMIS\Windows Services), and click Next
- Then close after the installation completes
- The service should start automatically as indicated in the system tray. If not, browse to Programs menu and search for "IMIS Policy Renewal" (PolicyRenewalController.exe) and execute it.
- **To configure the Policy Renewal service, right click on the service controller** application in the system tray, select Settings, and fill in the settings as follows for example:
 - Server: TPH-L14005\SQLEXPRESS (server instance name)
 - Database: IMIS (IMIS database name)
 - User Name: ImisUser
 - Password:
 - Time : 00:00
 - Interval: 24
 - Click on Apply. This will run a backup daily at midnight.

5.2 Install and configure openIMIS Backup service

- Download and unzip the installation setup from https://github.com/openimis/imis_backup_service_vb/releases/ latest
- Follow the same steps as for the Policy Renewal service to configure the

service.

5.3 Install and configure openIMIS Feedback Prompt service

- Download and unzip the installation setup from https://github.com/openimis/imis_feedback_prompt_service_vb/releases/latest
- Follow the same steps as for the Policy Renewal service to configure the

service.

5.4 Troubleshooting Windows Services

An error message may appear after the services started, saying that the service failed. In this case, restart it as a Local System service:

- Open the Windows Services manager
- Locate the service that failed
- Right click on it and select Properties \rightarrow Log on tab
- Select Local System account

Mobile application configuration guide

v1.2.0 and later

Mobile apps need to be re-compiled with the correct server's IP address for it to be functional.

To do so:

- Open Android Studio
- Open the mobile app project you want to configure (available on openIMIS github)
- For the Claim and Enquiry apps, locate the file called General.java in the project explorer
- For the IMIS app, locate the class AppInformation in the project explorer: App\src\main\java\tz\co\exact\imis\AppInformation.java
- Edit the class by replacing the server's IP address or server name, and save
- Build the app via the tools menu
- The new .apk file is now available in the release folder indicated by Android Studio

Web application user manual

v1.2.1

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.

7.1 Users' roles and rights

Role	Responsibilities	Available functionality
Scheme		
admin-		
istra-		
tor &		
district		
Staff		
Enrol-	He/she enrols insurees and submits enrolment forms to a	Capture a photo of an Insuree
ment	health insurance administration; handles policy modifica-	Send a photo
Officer	tions; collects feedback from scheme patients and submits	Inquiry on an Insuree
	to the health insurance administration.	Collect feedback from an Insuree
Village	He/she collects feedbacks and collects changes on insurees	Collect feedback from an Insuree
Exec-	during insurance periods	Inquiry on an Insuree
utive		
Officer		
(VEO)		
Man-	Over-sees operations of the health insurance scheme; runs	Create managerial statistics
ager	openIMIS operational reports analyses data generated from	Authorize issuance of a substitution
	the IMIS.	membership card
Ac-	Transfers data on collected Contributions to an external ac-	Transfer of data on Contributions to ac-
coun-	counting system. Calculates claim amounts per health facil-	counting system
tant	ity, runs openIMIS operational reports and presents claims	Valuation of a claim
	decision overview to management of a health insurance ad-	Transfer of a batch of claims for pay-
	ministrator. Processes approved claims to health facility sub- accounts.	ment
Clerk	Enters and modifies data on families, insurees, policies and	Creation/Search/Mod ification/Deletion
	contributions.	/Modification of a household/group, an
	Enters data on claims if the claims are submitted in a paper	Insuree, a Policy or a Contribution.
	form	Renewal of a policy
		Entry of a claim
Med-	Provides technical advice on claims verification from a med-	Checking of a claim for plausibility
ical	ical standpoint.	Review of a claim
Officer		Authorize a claim for payment
Scheme	Administers registers (all except the register of users)	Administer registers (Officers, Pay-
Admin-		ers, Medical Services, Medical Items,
istrator		Health Facilities, Medical Item Price
		Lists, Medical Services Price List, Prod-
		ucts), Extract Creation for Off-line Health Facilities
opan	Administers operations of the IMIS. Is responsible for back-	Administer the register of <i>users</i> , <i>Utili</i> -
open- IMIS	ups of data.	ties, Backup, Restore and Updates, Ex-
Admin-	ups of data.	tract Creation for Off-line Health Facil-
istrator		ities <#imis
	acilities staff	
Recep-	Verifies membership and issues to a patient a claim form.	Inquiring on a Household/group, In-
tionist	1	suree and Policy
Claim	Pools claim forms of a health facility, enters and submits	Opening of a batch of claims
admin-	claims.	Entry of a claim
istrator		
HF	Off-line Health Facility administration, Off-line extract up-	<i>Off-line extract upload</i>
Admin-	load	
istrator		
7.9ffl ivse r	sCrotes and hightser in the offline IMIS, Creation of offline	19
Admin-	Extract	
istrator		

7.2 Login Access

To access the software, Users, must have a valid User Name and Password, provided by the "IMIS Administrator". In the browser address bar type URL of the openIMIS and request the start page. Login page will appear (*Image 1 - User Login*).

IMIS Login	
Login Name jiri Password ••••••• Login]
	Forgot password?

Fig. 1: Image 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 (*Image 2 - Home Page*).

The full menu is displayed; Clicking on the menu headers will display a sub-menu providing further navigation options. Menus with a blue fore-colour are accessible, while menus with a grey fore-colour are disabled; either due to access rights of a user or unavailable functionality. Below the main 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 the districts to which the user has access.

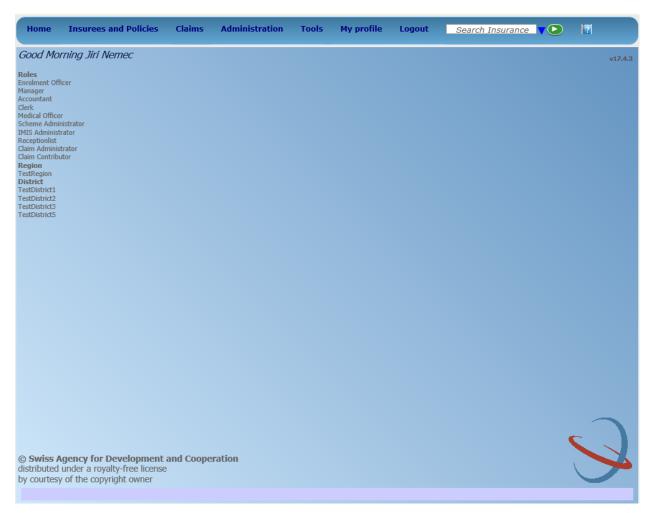
When a password is forgotten, clicking Forgot Password? results in the Forgot Password Page (*Image 3 - Forgot Password Page*).

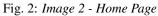
Enter the Email linked to the account and click on the Submit button. In case the Email coincides with the e-mail address provided with the user in the register of users, the forgotten password is sent to the indicated e-mail.

7.3 Administration of registers

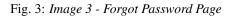
Registers of openIMIS serve as a principal tool by which openIMIS is adjusted to needs of health insurance schemes. With exception of the register of Users that can be managed only by users with the role openIMIS Administrator, all other registers can be managed by users with the role Scheme Administrator.

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





Enter email id to retrieve password	
Email:	
Go to Login	Submit



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.

7.3.1 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 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 role of Scheme Administrator.

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.

Home I	nsurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No 🔻 돈	2	v16.3.0
Current User			Products						
Jiri Nemec (Jiri) Roles Enrolment Officer Manager Accountant Clerk			Health Facilities Price Lists						
Nedical Officer Scheme Administra IMIS Administrator Receptionilist Claim Administrator			Medical Services Medical Items						
Claim Contributor District Dummy Kongwa			Users Enrolment Officers						
Bahi Dodoma Kifosa Basel			Claim Administrat						
Mpapwa Kailali Msalala Bamenda			Payers Locations						

Fig. 4: Image 4 - Navigation Products

Product Control Page

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

	Criteria											
roducts					_							
	Code				Name				Region	Select Re	egion 🗸	
	Date From								District		✓	Historica
	Data Ta											_
	Date To											Search
Droc	lucts Found											
FIUC												
											GRACE	
CODE	NAME	REGION	DISTRICT	DATE FROM	DATE TO	MAXIMUM		CONTRIBUTION O		PERIOD	PERIOD FROM	VAL TO
IF01	National free enrolment	National		01/01/2015	01/01/2020	E	10,000.00	2,000.00	1,000.00	12	ENROLMENT PROF	017
F01 F01	Regional free	TestRegion		01/01/2015	01/01/2020		5,000.00	2,000.00	500.00	12	0 01/01/2	
0F01	District free enrolment	TestRegion	TestDistrict1	01/01/2015	01/01/2025		20,000.00	2,000.00	1,000.00	12	0 01/01/2	
IX01	National fixed enrolment	National	resubisitier	01/01/2015	28/05/2017	100		1,000.00	500.00	12	1 29/05/2	
2X01	Regional fixed enrolment	TestRegion		01/01/2010	01/01/2030		10,000.00	1,000.00	500.00	12	0 01/01/2	
DX01	District fixed enrolment	TestRegion	TestDistrict1	01/01/2017	01/01/2024		5,000.00	1,000.00	2,000.00	12	1 01/01/2	
T001	Test product	TestRegion	Testeriori	01/01/2017	12/05/2017		10,000.00	1,000.00	2,000.00	12	0 13/05/2	
NX01-1	National fixed enrolment	National		01/01/2016	01/01/2024	100		1,000.00	500.00	12	1 29/05/2	
INOI I	Nutronal fixed chromiene	Nacional		01/01/2010	01/01/2021	100	0.00	1,000.00	500.00	12	1 27/05/2	.017

Fig. 5: Image 5 - 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. (*Image 5 - 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 (image6); 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.

4	Se	pte	mbei	r , 20 :	12	►	•	20)12	+	•	20	12	+
Su	Мо	Tu	We	Th	Fr	Sa								
26	27	28	29	30	31	1	Jan	Feb	Mar	Apr	Jan	Feb	Mar	Apr
2	3	4	5	6	7	8								
9	10	11	12	13	14	15	May	Jun	Jul	Aug	May	Jun	Jul	Aug
16	17	18	19	20	21	22				-				-
23	24	25	26	27	28	29		_ .		_		_ .		_
30	1	2	3	4	5	6	Sep	Oct	Nov	Dec	Sep	Oct	Nov	Dec
1	Гoday	: Sep	otemb	er 6,	2012	2	Toda	ay: Septe	ember 6,	2012	Toda	ay: Septe	ember 6,	2012

Image 6 - 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 (*Image 7 - Historical records - Result Panel*).

CODE	NAME	REGION	DISTRICT	DATE FROM	DATE TO	MAXIMUM MEMBERS		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	
NF01	National free	National	-	01/01/2015	01/01/2020	-5	10,000.00	2,000.00	1,000.00	-12	Ð	-09/05/2017	09/05/2017
Dx01	District fixed enrolment	-TestRegion	-TestDistrict1	01/01/201 7	01/01/2024	-5	5,000.00	1,000.00	2,000.00	-12	-1	-09/05/201 7	09/05/2017
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	National fixed enrolment	National	-	01/01/2016	01/01/2024	-100	0.00	1,000.00	500.00	-12	4	-09/05/2017	15/05/2017
NX01	National fixed enrolment	National	-	01/01/2016	01/01/2024	-100	0.00	1,000.00	500.00	+2	-1	01/01/2016	17/05/2017
NF01	National free enrolment	National	-	01/01/2015	01/01/2020	-5	-10,000.00	2,000.00	1,000.00	-12	Ð	01/01/2016	17/05/2017
NX01	National fixed enrolment	National	-	01/01/2016	01/01/2024	-100	0.00	1,000.00	500.00	-12	-1	01/01/2016	20/05/2017
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	
<u>NX01</u>	National fixed enrolment	National	-	01/01/2016	01/01/2024	-100	0.00	1,000.00	500.00	-12	-1	01/01/2016	29/05/2017
1 2													

Fig. 6: Image 7 - 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 (*Image 8 - Selected record (blue)*, *hovered records (yellow) - Result Panel*). 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.

ODE	NAME	REGION	DISTRICT	DATE FROM	DATE TO	MAXIMUM MEMBERS		CONTRIBUTION ADULT	CONTRIBUTION CHILD	INSURANCE PERIOD		VALID FROM	VALID TO
IF01	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	
F01	Regional free	TestRegion		01/01/2016	01/12/2025	3	5,000.00	2,000.00	500.00	12	0	01/01/2016	
F01	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	
0:01	National fixed enrolment	National		01/01/2016	28/05/2017	100	0.00	1,000.00	500.00	12	1	29/05/2017	
X01	Regional fixed enrolment	TestRegion		01/10/2016	01/01/2030	6	10,000.00	1,000.00	500.00	12	0	01/01/2016	
0001	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	
001	Test product	TestRegion		01/01/2017	12/05/2017	5	10,000.00	1,000.00	2,000.00	12	0	13/05/2017	
001-1	National fixed enrolment	National		01/01/2016	01/01/2024	100	0.00	1,000.00	500.00	12	1	29/05/2017	

Fig. 7: Image 8 - 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 (*Image 9 - Page selector - Result Panel*).

Fig.	8:	Image	9 -	Page	selector	-	Result	Panel
------	----	-------	-----	------	----------	---	--------	-------

3. Button Panel

With exception of the Cancel button, which re-directs to the Home Page (*Image 2 - 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

lome Insurees and Po	licies Claims	Administration To	ools My profile	Logout		
surance Product details		Charles H				
Code RF01		Check All Medical Services				
Name Regio	nal free	CODE NAME	TYPE L	EVEL PRI	CE LIMITO LIMITR LI	
Region TestR	egion 🗸	X100 Burst Abdome		Simple Service 100		P
District Sel	ect a District 🔽	✓ X101 Cholecystecto		Simple Service 200		P
Date From 01/01/	2016			Simple Service 500		
Date To 01/12/		X103 Delivery-Norm	nal Curative S	Simple Service 300	.00 C C C	P >
		Check All				
ConversionSele	ct Product 🔽 🔵	Medical Items				
Lump Sum	5,000.00	CODE NAME		TYPE P/	ACKAGE PRICE LIMIT O	
Threshold Members	2		YLIC ACID (ASPIRIN) TABS			
Maximum Members	3	Y201 ADRENALINE Y203 FRUSEMIDE T	1ML INJ 1MG/ML TABS 40 MG	Drug Vi Drug 10	als 500.00 C 00 Tablets 500.00 C	
Contribution Adult	2,000.00	V204 KETOCONAZO		-		
Contribution Child	500.00					
Insurance Period	12		neration) ACRF01R		count Code(Contribution)	
Administration Period	0	Registration L			Assembly Lump Sum	5,000.00
	2			0.00	Assembly Fee	
Max Installments		Sta	rt Cycle 1 Day 🗸 Mo	nth 🗸	Start Cycle 3	Day 🗸 Month 🗸
Grace Period Payment	0	Sta	rt Cyde 2 Day 🗸 Mo	nth 🗸	Start Cyle 4	Day 🗸 Month 🗸
Grace Period Enrolment	0	Ceiling Inter	rpretation Hospital	V		
Grace Period Renewal						
Renewal Disc. %						
Renewal Disc. Period						
Save						Cance
Iome Insurees and Po	licios Claims	Administration To	ools My profile	Logout	Search Insurance	
iome Insurees and Po	licies Claims	Administration To	ools My profile	Logout	Search Insurance	• •
	licies Claims 0	Administration To	ools My profile	Logout	Search Insurance	
		Administration To	ools My profile	Logout	Search Insurance	•
Grace Period Enrolment		Administration To	ools My profile	Logout	Search Insurance	• •
Grace Period Enrolment Grace Period Renewal		Administration To	ools My profile	Logout	Search Insurance	•
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period		Administration To	ools My profile	Logout	Search Insurance	•
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period Enrolment Disc. %		Administration To	ools My profile	Logout	Search Insurance	
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period Enrolment Disc. % Enrolment Disc. Period	0					
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period Enrolment Disc. % Enrolment Disc. Period		Administration To	Deductable (Hospital)		Search Insurance	
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period	0					
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period Enrolment Disc. Period Enrolment Disc. Period Treatment	0					
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period Enrolment Disc. Period Enrolment Disc. Period Treatment Insuree	0					
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Renewal Disc. Period Enrolment Disc. Period Treatment Insuree Policy	0					
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Comparison Enrolment Period Comparison Enrolment Period Comparison Enrolment Period Enrolment Period Enrolment Period Enrolment Disc. Period E	0	Ceiling	Deductable (Hospital) 			
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Enrolment Disc. Period Enrolment Disc. Period Enrolment Disc. Period Entreatment Insuree Policy Extra Member Ceiling Maximum Ceiling Co Number	Deductible	Ceiling	Deductable (Hospital) 	Ceiling	Deductable (Non-	-Hospital) Ceiling
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Cc Number Ceiling	Deductible	Ceiling	Deductable (Hospital) (Ceiling	Deductable (Non	Hospital) Ceiling Visits
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. Period Entreatment Insuree Policy Extra Member Ceiling Maximum Ceiling Co Number	Deductible	Ceiling	Deductable (Hospital) (Ceiling spitalizations	Deductable (Non-	Hospital) Ceiling
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Cc Number Ceiling	Deductible	Ceiling	Deductable (Hospital) (Ceiling Spitalizations	Deductable (Non	Hospital) Ceiling
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Ca Number Ceiling Distribution NONE	Deductible	Ceiling	Deductable (Hospital) (Ceiling spitalizations	Deductable (Non	Hospital) Celling Visits
Srace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Ca Number Ceiling Distribution NONE	Deductible	Ceiling	Deductable (Hospital) 1	Ceiling Spitalizations	Deductable (Non-	Hospital) Ceiling
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Ceiling Ceiling Distribution NONE	Deductible	Ceiling Surgeries Month	Deductable (Hospital) i Deductable (Hospital) i Deliveries Ho I I I I V Level 3 re V Sub Level 3	Ceiling Spitalizations Signalizations Signalization	Deductable (Non- Antenatal Monthly V	Hospital) Ceiling Visits
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Ceiling Distribution NONE spitation Payment Level 1 Health Ce Sub Level 1 - Select 1 Share of 60	0 Deductible insultations Period SubLeve ♥ SubLeve	Ceiling Ceiling Surgeries Month Level 2 Dispensary Level 2 — Select SubLev	Deductable (Hospital) Deductable (Hospital) Deliveries Ho 1 1 1 1 1 1 1 1 1 1 1 1 1	Ceiling Spitalizations Signalizations Signalization	Deductable (Non- Antenatal Monthly Y Level 4 Sub Level 4	Hospital) Ceiling
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Enrolment Disc. Period Treatment Number Policy Extra Member Ceiling Maximum Ceiling Ceiling Distribution NONE Sub Level 1 Health Ce Sub Level 1 - Select 3 Share of 60	0 Deductible insultations v Peric entre ♥ SubLeve ♥ Su	Ceiling Surgeries Ad Percent Ceiling Surgeries Ceiling Ceiling Surgeries Ceiling Cei	Deliveries Ho	Ceiling spitalizations	Deductable (Non- Antenatal Monthly V	Hospital) Ceiling
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Enrolment Disc. Period Treatment Number Policy Extra Member Ceiling Maximum Ceiling Ceiling Distribution NONE Sub Level 1 Health Ce Sub Level 1 - Select 3 Share of 60	o Deductible insultations Period SubLeve ♥ Su	Ceiling Surgeries Ad Percent Ad Dispensary Level 2 Dispensary b Level 2 Select SubLev Weight of Topulation 10 Weight of Top	Deliveries Ho I Deliveries Ho I V Level 3 (e V Sub Level 3 Weight of Number of Families Weight of Number of Families Weight of Adjusted	Ceiling spitalizations	Deductable (Non- Antenatal Monthly Y Level 4 Sub Level 4	Hospital) Ceiling
Grace Period Enrolment Grace Period Renewal Renewal Disc. % Enrolment Disc. % Enrolment Disc. Period Enrolment Disc. Period Treatment Insuree Policy Extra Member Ceiling Maximum Ceiling Maximum Ceiling Ceiling Distribution NONE Sub Level 1 Health Ce Sub Level 1 Health Ce Sub Level 1 Health Ce Sub Level 1 Health Ce Sub Level 1 Health Ce	o Deductible insultations Period SubLeve ♥ Su	Ceiling Surgeries Month Level 2 Dispensary tb Level 2 Select SubLev Weight of 10	Deliveries Ho	Ceiling spitalizations	Deductable (Non- Antenatal Monthly Y Level 4 Sub Level 4	Hospital) Ceiling

Image 10 - Product Page

• 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 (image11). 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.

✓ September, 2012 →						×	4	20)12	+	4	2010	-2019	Þ
Su	Мо	Tu	We	Th	Fr	Sa								
26	27	28	29	30	31	1	Jan	Feb	Mar	Apr	2009	2010	2011	2012
2	3	4	5	6	7	8								
9	10	11	12	13	14	15	May	Jun	Jul	Aug	2013	2014	2015	2016
16	17	18	19	20	21	22				-				
23	24	25	26	27	28	29				_	2017	2010	2010	2020
30	1	2	3	4	5	6	Sep	Oct	Nov	Dec	2017	2018	2019	2020
1	Today	/: Se	ptemb	ber 6,	2013	2	Toda	ay: Septe	ember 6,	2012	Toda	ay: Septe	mber 6,	2012

Image 11 - 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.*

• 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.

• 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

	Check All	es								
Teran	CODE	NAME	ТҮРЕ	HF LEVEL	PRICE	LIMIT O	LIMIT R	LIMIT E	ORIGIN	-
	AOFB01	Antenatal Examination	Preventive	Simple Service	800.00	С	С	С	Р	
	COBB01	Consultation GP	Curative	Visit	200.00	С	С	С	Р	
	DEL	Delivery	Curative	Hospital case	15000.00	С	С	С	Р	
<	DIFB12	Deliverv-normal	Curative	Simple Service	8000.00	С	C	C	P >	

Fig. 9: Image 12 - 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 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 an 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.
- medical items

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

Check All Medical Items											
	CODE	NAME	түре	PACKAGE	PRICE	LIMIT O	LIMIT R	LIMIT E	ORIGIN	ADULT O	ADU
	GBBB09	Acetylilsalicylic Acid	Drug	Tabs	300.00	С	С	С	Р	100.00	100.0
	GBBC01	Ampicilin PDR	Drug	Tabs	400.00	С	С	С	Р	100.00	100.0
<											>

Fig. 10: Image 13 - 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 coinsurance 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 coinsurance 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 outpatient 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.

• 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.

- 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.

• Ceiling Interpretation

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 clamed 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 insure 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 nonhospital 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.

• 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 (image14) 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.



Image 14 - 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:

Where

is the amount of capitation payment for i-th health facility

is the value of the indicator of the type a for the i-th health facility.

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

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

is the formula parameter Share of contribution

is the weight of the indicator of the type a.

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.

7.3.2 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 role of Scheme Administrator.

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

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.

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No V	17	v16.3.0
Current User	Products					
Jiri Nemec (Jiri) Roles Enrolment Officer	Health Facilities					
Manager Accountant Clerk	Price Lists					
Nedical Officer Scheme Administrator IMIS Administrator	Medical Services					
Receptionilist Claim Administrator	Medical Items					
Claim Contributor District Dummy	Users					
Kongwa Bahi	Enrolment Officers					
Dodoma Kifosa Basel	Claim Administrators					
Mpapwa Katali	Payers					
Msalala Bamenda	Locations					

Fig. 11: Image 15 - Navigation Health Facilities

Home	Insurees and P	olicies Claims	Administra	ation Too	ols My profile	Logout	Search Insu	rance 🔻 ⋗	17
Select	Criteria								
Health Fa	cility Details								
	HF Code		Phone	e Number			RegionSelec	ct Region 🗸 🗸	
	Name			Email			District	~	Historical
Α		elect Level			elect Legal Form				
	Level Se		J	egal Form 3	elect Legal Form	*	Care Type Sele	ct Type 🗸	Search
							Fax]
3 Facil	ities Found								
HF CODE	NAME	LEGAL FORM	LEVEL	CARE TYPE PI	IONE NUMBER R	EGION	DISTRICT	ID VALID FRO	4 VALID TO
<u>HF01</u>	Regional hospital	Government	Hospital	Both	т	estRegion	TestDistrict1	1 10/05/2017	
<u>HF02</u>	District1 health Center	District organization	Health Centre	Out-Patient +	4201111111111 T	estRegion	TestDistrict1	3 10/05/2017	
HF03	Health centre District2	District organization	Health Centre	Out-Patient	т	estRegion	TestDistrict2	6 10/05/2017	
B									
CAdd D	D		Edit			Delete			Cancel

Fig. 12: Image 16 - 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 (*Image 16 - Health Facilities Control Page*)

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.

• 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 (*Image 17 - Historical Records - Result Panel*)

HF CODE	NAME	LEGAL FORM	LEVEL	CARE TYPE	PHONE NUMBER	REGION	DISTRICT	ID	VALID FROM	VALID TO
<u>HF01</u>	Regional hospital	Government	Hospital	Both		TestRegion	TestDistrict1	1	10/05/2017	
HF01	Regional hospital	Government	Hospital	Both	-	-TestRegion	TestDistrict1	2	-10/05/2017	10/05/2017
HF02	District1 health Center	District organization	Health Centre	Out-Patient	+42011111111111	TestRegion	TestDistrict1	3	10/05/2017	
HF02	District1 health Center	District organization	Health Centre	Out Patient	+42011111111111	- TestRegion	TestDistrict1	5	-10/05/2017	10/05/2017
HF02	District1 health Center	District organization	Health Centre	Out Patient	+42011111111111	- TestRegion	-TestDistrict1	4	-10/05/2017	10/05/2017
HF03	Health centre District2	District organization	Health Centre	Out-Patient		TestRegion	TestDistrict2	6	10/05/2017	
HF03	Health centre District2	District organization	Health Centre	Out Patient	-	-TestRegion	-TestDistrict2	7	-10/05/2017	10/05/2017

Fig. 13: Image 17 - 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 blue, while hovering over records changes the highlight to yellow (*Image 18 - Selected record (blue), hovered records (yellow) - Result Panel*). 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.

HF CODE	NAME	LEGAL FORM	LEVEL	CARE TYPE PHONE NUMBER	REGION	DISTRICT	ID	VALID FROM V	ALID TO
HE01	Regional hospital	Government	Hospital	Both	TestRegion	TestDistrict1	1	10/05/2017	
HF02	District1 health Center	District organization	Health Centre	Out-Patient +42011111111111	TestRegion	TestDistrict1	3	10/05/2017	
HE03	Health centre District2	District organization	Health Centre	Out-Patient	TestRegion	TestDistrict2	6	10/05/2017	

Fig. 14: Image 18 - 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 (*Image 19 - Page selector- Result Panel*)



Fig. 15: Image 19 - 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 redirects 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

Home	Insurees and Policies	Claims	Administration	Tools My profile	Logout Search	h Insurance V 🕑 🛛 🕅
Health Faci			Basiss	District	Musiciality	Village
	Legal Form Government	~	Region	District	Municipality	Village
	Level Hospital	~	REGION Region	DISTRICT TestDistrict1	MUNICIPALITY TestMunicipality11	VILLAGE CATCHMENT
	Sub Level Select SubLe	vel 🔽	Region North West	✓ TestDistrict2	✓ TestMunicipality12	
			South West	✓ TestDistrict3	✓ TestMuniciplaity13	TestVillage112 100
	Code HF01		Central	TestDistrict1	✓ TestMunicipality21	TestVillage113 100
	Name Regional hospita	al	Capital	TestDistrict2	✓ TestMunicipality31	TestVillage121 100
	str Colomba		✓ TestRegion	TestDistrict3	✓ TestMunicipality32	TestVillage122 100
	Address Str. Corollabo		Singida	TestDistrict5	✓ TestMunicipality33	✓ TestVillage123 100
	Region TestRegion	\checkmark	Maritime		TestMunicipality11	✓ TestVillage131 100
	Region TestRegion	•	Plateaux		TestMunicipality12	
	District TestDistrict1	\checkmark	Central		TestMuniciplaity13	
			Kara		TestMunicipality31	TestVillage133 100
PI	hone Number		Savanes		TestMunicipality32	✓ TestVillage211 100
	Fax		Togo Délégation Générale		TestMunicipality33	✓ TestVillage311 100
			(Nationale)		TestMunicipality34	TestVillage321 100
	Email		Sud Kivu		TestMunicipality14	
	Care Type Both	\checkmark	TestRegion2		TestMunicipality15	
Price I						TestVillage331 100
	Lists (Medical Services) Hospital service					TestVillage332 100
Price I	Lists (Medical Items) Hospital items p	oriceli: 🗸				TestVillage333
4	Account Code					
Save						Canc

Fig. 16: Image 20 - 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

Click on the Edit button to re-direct 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 (*Image 21 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

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

7.3.3 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 role of Scheme Administrator.

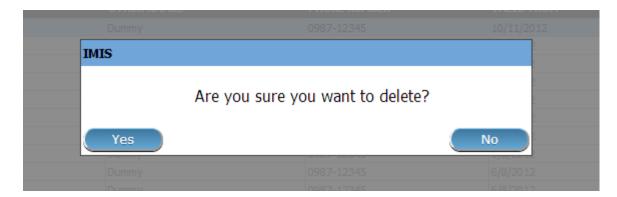


Fig. 17: Image 21 - Delete confirmation- Button Panel

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.

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No 🔻 돈	2	v16.3.0
Current User	Products					
Jiri Nemec (Jiri) Roles Enrolment Officer	Health Facilities					
Manager Accountant Clerk	Price Lists					
Medical Officer Scheme Administrator IMIS Administrator	Medical Services					
Receptionist Claim Administrator Claim Contributor	Medical Items					
District Dummy	Users					
Kongwa Bahi	Enrolment Officers					
Dodoma Kifosa Basel	Claim Administrators					
Mpapwa Katali	Payers					
Msalala Ramenda	Locations					

Fig. 18: Image 22 - 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 (*Image 23 - Medical Services Control Page*)

1. Search Panel

elect Cr			My profile L	ogout Search	Insurance N		2 v16.
	iteria						
ledical Servi	ice Details						
^							
A	Code	Name		Type -	- Select Service	е Туре 🔻	Historical
							Search
3 Servic	ces Found						
CODE	NAME		ТҮРЕ	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	
) <u>EL</u>	Delivery		Curative	Hospital Case	15,000	.00 08/11/2016	
	Delivery-normal		Curative	Simple Service		.00 01/01/2015	
BBB01 B3B02	Urine Analysis		Curative	Simple Service		.00 01/01/2015	
	Gastronomy		Curative	Simple Service	4,000	.00 01/01/2015	
<u>BBX</u>	Tracheostomy		Curative	Simple Service	20,000	.00 29/11/2016	
SOMA01	Burst Abdomen		Curative	Simple Service	1,000	.00 01/01/2015	
	Inpatient Hospitalization		Curative	Hospital Case	25,000	.00 08/11/2016	
OPD	Outpatient Consultation		Curative	Simple Service		.00 08/11/2016	
	Colostomy		Curative	Simple Service		.00 01/01/2015	
	Mastectomy		Curative	Simple Service		.00 01/01/2015	
SURG	Surgery		Curative	Hospital Case	70,000	.00 08/11/2016	

Fig. 19: Image 23 - Medical Services Control Page

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.

• 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 (*Image 24 - Historical records - Result Panel*)

CODE	NAME	ТҮРЕ	LEVEL	PRICE	VALID FROM	VALID TO
ź	4	Preventive	Simple Service	1.00	-14/08/2012	-14/08/2012
1	4	Areventive	Simple Service	1.00	-14/08/2012	-14/08/2012
111112	MS	Areventive	Visit	9,000.00	-14/08/2012	-14/08/2012
111112	MS	Preventive	Visit	9,000.00	-14/08/2012	-14/08/2012
3102	Sara Chadali	Curative	Simple Service	500.00	15/08/2012	
<u>I2</u>	Cervix Repair	Curative	Simple Service	2,000.00	15/08/2012	
<u>13</u>	Colpotomy	Curative	Simple Service	2,500.00	15/08/2012	
<u>#1</u>	Cervical Cerclage Shrodikar	Curative	Hospital Case	3,000.00	-15/08/2012	-15/08/2012

Fig. 20: Image 24 - 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 (*Image 25 - Selected record (blue), hovered records (yellow) - Result Panel*). 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	түре	LEVEL	PRICE	VALID FROM	VALID TO
3102	Sara Chadali	Curative	Simple Service	500.00	15/08/2012	
<u>12</u>	Cervix Repair	Curative	Simple Service	2,000.00	15/08/2012	
<u>I3</u>	Colpotomy	Curative	Simple Service	2,500.00	15/08/2012	
<u>M20</u>	Tonsilectomy	Curative	Simple Service	5,000.00	15/08/2012	
<u>P1</u>	Biopsy-cervical	Curative	Simple Service	500.00	15/08/2012	
<u>P 10</u>	Biopsy-skin	Curative	Simple Service	350.00	15/08/2012	
P26	Flap Excision	Curative	Simple Service	600.00	15/08/2012	

Fig. 21: Image 25 - 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 (*Image 26 - Page Selector - Result Panel*).

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

Fig. 22: Image 26 - 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 redirects to the *Medical Service 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

• 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, Daz of Staz, 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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	?	v16.3.0
[Medical Serv	vice Details								
	Code]						
	Name]						
	Type OPreventive	Curative							
	Category Select Leve	el 🔻							
	HF Level Select HF I	Level V]						
	Price								
	Care Type Out-Patient	In-Patient O	Both						
	Frequency	C							
	Patient 🗹 Man 🗹 Wo Child	man 🗹 Adult 🗹							
Save									Cancel

Fig. 23: Image 27 - Medical Service Page

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 redirected 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 (*Image 28 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

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

7.3.4 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 role of Scheme Administrator

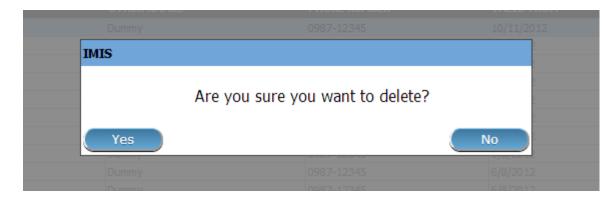


Fig. 24: Image 28 - Delete confirmation- Button Panel

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

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No 🔻 🕒	2	v16.3.0
Current User	Products					
Jiri Nemec (Jiri) Roles Enrolment Officer	Health Facilities					
Manager Accountant Clerk	Price Lists					
Nedical Officer Scheme Administrator	Medical Services					
IMIS Administrator Receptionist Claim Administrator	Medical Items					
Claim Contributor District	Users					
Dummy Kongwa Bahi	Enrolment Officers					
Dodoma Kifosa	Claim Administrators					
Basel Mpapwa Kailal	Payers					
Notal Msalala Bamanda	Locations					

Fig. 25: Image 29 - Navigation Medical Items

Clicking on the sub menu Medical Items re-directs the current user to the 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 (*Image 30 - Medical Items Control Page*)

1. Search Panel

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurand	ce No 🔻 🕨	?	v16.3.0
Select C	riteria									
Medical Ite	m Details									
A	Code		Name				Type Select Ite	т Туре 🔻		
1	Package								🔲 His	torical
									5	arch
4 Items	Found									
									_	
CODE GBBB09	Acetylilsalicylic Acid	_		(PE rug	PACKAGE Tabs	_	PRICE	VALID FRC 300.00 01/01/2015		ID TO
	Ampicilin PDR			rug	Tabs			400.00 01/01/2013		
CRBC01 BC003	Albendazole Tab.			rug	100 tablets			500.00 12/12/2010		
GBC004	Bendrofluazide			rug	100 tablets			400.00 12/12/2010		
C Add			Edit			Delete				ancel
D										

Fig. 26: Image 30 - Medical Items Control Page

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 (*Image 31 - Historical records - Result Panel*).

CODE	NAME	ТҮРЕ	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	4	Drug	£	1.00	-14/08/2012	-14/08/2012
ź	4	Drug	4	1.00	-14/08/2012	-14/08/2012
ź	4	Drug	4	-1.00	-15/08/2012	-15/08/2012
1	4	Drug	4	1.00	-15/08/2012	-15/08/2012

Fig. 27: Image 31 - 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 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 (*Image 32 - Selected record (blue), hovered records (yellow) - Result Panel*). 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 (*Image 33 - 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 redirects to the *Medical Item Page*, the button panel (the buttons Edit and Delete) is used in conjunction

						_
CODE	NAME	ТҮРЕ	PACKAGE	PRICE	VALID FROM	VALID TO
00001	Paracetamol	Drug	0	1,200.00	11/08/2012	
<u>M1</u>	Aceclofenac 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	Albendazole400mg	Drug	Tablets	500.00	15/08/2012	
<u>M2</u>	Acetazolamide250 mg	Drug	Tablets	1,000.00	15/08/2012	
<u>M21</u>	Amethocaine Eye Drops 0.01	Drug	Bottle	5,000.00	15/08/2012	
		-	1.0.1			

Fig. 28: Image 32 - Selected record (blue), hovered records (yellow) - Result Panel

Fig. 29: Image 33 - Page selector- Result Panel

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.

• 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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	7	v16.3.0
Medical Item	n Details								
	Code								
	Name								
	Type ODrug OMed	ical Prostheses							
	Package								
	Price]						
	Care Type Out-Patient	In-Patient O	Both						
	Frequency	0							
	Patient 🖉 Man 🖉 Adult 🖉 Cl		-						
Save									ancel
Save									ancer

Fig. 30: Image 34 - Medical Item Page

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 redirected 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 (*Image 35 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

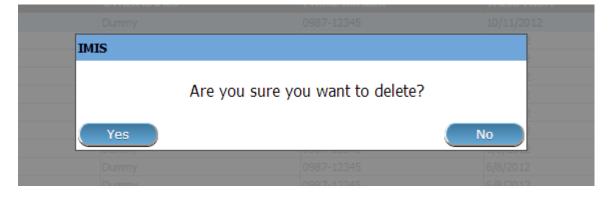


Fig. 31: Image 35 - Delete confirmation- Button Panel

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

7.3.5 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 role of Scheme Administrator

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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logo	ut Search Insurance No 🔨 💽	2	v16.3.0
Current Use Jiri Nemec (jir			Products						
Roles Enrolment Off			Health Facilities						
Manager Accountant Clerk			Price Lists	Med	lical Services				
Medical Office Scheme Admi	nistrator		Medical Services	Med	lical Items				
IMIS Administ Receptionlist Claim Adminis			Medical Items						
Claim Contribu District Dummy			Users						
Kongwa Bahi			Enrolment Officers						
Dodoma Kilosa			Claim Administrate	ors					
Basel Mpapwa Kailali			Payers						
Nalala Nsalala Ramenda			Locations						

Fig. 32: Image 36 - Navigation Medical Services Price Lists

Clicking on the sub menu Medical Services re-directs the current user to the *Price List Medical Services 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 (*Image 36 - Navigation Medical Services Price Lists*)

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.

Home In	surees and Policies	Claims	Administration	Tools My pro	file Logout	Search Insurance	D 17					
Select Crite	ria											
Price Lists (Medical Services)												
A Name		Date		RegionSelect Regio	n 🗸 Distr	ict 🔽	Historical Search					
5 Pricelists	Found											
NAME			DATE	REGION	DISTRICT	VALID FROM	VALID TO					
Health centre service	vice pricelist		10/05/2017	TestRegion	TestDistrict1	10/05/2017						
Hospital service p	ricelist		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						
B												
C Add		Edit		Duplicate	De	ete	Cancel					
D												

Fig. 33: Image 37 - Price List Medical Service Control Panel

• 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 (image38); 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.

	Se	epte	mbe	r , 20 :	12	•
u	Мо	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
	Today	r: Sei	otemh	per 6.	2013	,

Image 38 - 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 (*Image 39 - Historical records - Result Panel*)

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
Health centre	10/05/2017	- TestRegion	-TestDistrict1	-10/05/2017	10/05/2017
Health centre service pricelist	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
Hospital pricelist	01/01/2017	-TestRegion	TestDistrict1	-09/05/2017	10/05/2017
Hospital service pricelist	01/01/2017	-TestRegion	TestDistrict1	10/05/2017	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	

Fig. 34: Image 39 - Historical records - Result Panel

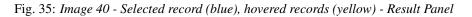
• Search button

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 (*Image 40 - Selected record (blue), hovered records (yellow) - Result Panel*). 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	



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 41 - Page selector- Result Panel*)



Fig. 36: Image 41 - 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 *Price List Medical Service 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

Home	Insurees and Policies	Claims	Administration	n Tools My profile Logo	out Search Ins	urance 🔽 💽				
ice Lists ((Medical Services)		Check All							
	Name Health centre se	ervice pric	Medical Services							
	Date 10/05/2017		CODE	NAME	ТҮРЕ	PRICE OVERRUL	E			
				✓ X106	Urinary lab test	Curative	200.00			
	Region TestRegion	~	✓ X108	Antenatal examination	Preventive	100.00				
	District TestDistrict1	~	✓ X109	GP visit	Curative	100.00				
	District TestDistrict T	•	X100	Burst Abdomen	Curative	1,000.00				
			X101	Cholecystectomy	Curative	2,000.00				
			X102	Caesarean Section Delivery	Curative	500.00				
			X103	Delivery-Normal	Curative	300.00				
			X105	Mastectomy	Curative	2,000.00				
			X107	Tubinectomy	Curative	300.00				
Save	D					C	ance			

Fig. 37: Image 42 - 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, Overrule, which can be used to overrule the pre-set price. By clicking once on the row desired item in the overrule 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 (*Image 43 - Delete Confirmation - Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

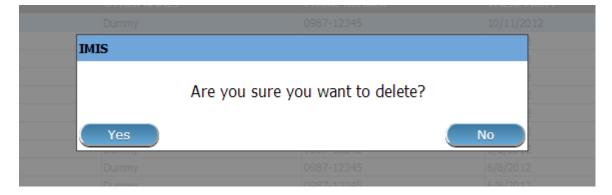


Fig. 38: Image 43 - Delete Confirmation - Button Panel

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.

7.3.6 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 role of Scheme Administrator.

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.

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

Home Insurees and Policies Claims	Administration To	ols My profile	Logout	Search Insurance No 🔻 🖻	7	v16.3.0
Current User	Products					
Jiri Nemec (jiri) Roles	Health Facilities					
Enrolment Officer	nearur raciities					
Manager Accountant	Price Lists	Medical Services				
Clerk		****	_			
Nedical Officer Scheme Administrator	Medical Services	Medical Items				
IMIS Administrator	Ficarcar Der Fices	and the second second				
Receptionlist	Medical Items					
Claim Administrator Claim Contributor		••••				
District	Users					
Dummy Kongwa	Enrolment Officers					
Bahi	enroiment Oncers					
Dodoma Kilosa	Claim Administrators					
Basel						
Mpapwa	Payers					
Kalali Msalala	Locations					
Bamenda						

Fig. 39: Image 44 - Navigation Price Lists Medical Items

Home	Insurees and Policies	Claims Administration	Tools My profile	Logout Search 1	nsurance 🔻 돈	7
Select C	riteria					
Price Lists (I	Medical Items)					
-	Name	Date	RegionSelect I	Region V District		~
Α	Nome		Keylon Ociceri	District		_
						Historical
						Search
						Dearch
						_
Priceli	sts Found					
NAME		DATE	REGION	DISTRICT	VALID FROM	VALID TO
Hospital iter	ms pricelist	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
	re items pricelist	10/05/2017	TestRegion	TestDistrict1	10/05/2017	
Test pricelis		10/05/2017	TestRegion	TestDistrict2	10/05/2017	
Add		Edit	Duplicate	Delete		Cancel

Fig. 40: Image 45 - 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 (*Image 48 - Selected record (blue)*, *hovered records (yellow) - Result Panel*).

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 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 (*Image 45 - Price List Medical Items Control Page*); 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.

✓ September, 2012 →			4	20	12	+	4	2010	-2019					
Su	Мо	Tu	We	Th	Fr	Sa								
26	27	28	29	30	31	1	Jan	Feb	Mar	Apr	2009	2010	2011	2012
2	3	4	5	6	7	8								
9	10	11	12	13	14	15	May	Jun	Jul	Aug	2013	2014	2015	2016
16	17	18	19	20	21	22								
23	24	25	26	27	28	29				_				
30	1	2	3	4	5	6	Sep	Oct	Nov	Dec	2017	2018	2019	2020
Today: September 6, 2012					Toda	iy: Septe	ember 6,	2012	Toda	iy: Septe	mber 6,	2012		

Image 46 - 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 (*Image 47 - Historical records - Result Panel*).

NAME	DATE	REGION	DISTRICT	VALID FROM	VALID TO
Hospital items pricelist	01/01/2017	TestRegion	TestDistrict1	10/05/2017	
Hospital pricelist	01/01/2017	TestRegion	TestDistrict1	09/05/2017	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	

Fig. $A1 \cdot h$	mage 47 -	Historical	records -	Result Panel
1'1g. 41. <i>11</i>	nuge 47 -	msionicai	records -	Result I unet

• 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 (*Image 48 - Selected record (blue)*, *hovered records (yellow) - Result Panel*). 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
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	

Fig. 42: Image 48 - 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 (*Image 49 - Page selector- Result Panel*)



Fig. 43: Image 49 - 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 redirects to the *Price List Medical Item 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

Home	Insurees and Policies	Claims	Adn	ninistratio	n Tools	My profile	Logout	Search In	surance 🔻 돈	?	
rice Lists (Medical Items)		-								
			Che								
	Name Hospital items p	ricelist	Medic	Medical Items							
	01/01/2017			CODE			TARC DOOMC	ТҮРЕ	PRICE	OVERRULE	
			✓	Y200 Y201	ADRENALINE 1	IC ACID (ASPIRIN)	TABS 300MG-	Drug Drug	200.00		
	Region TestRegion	~	 ✓ ✓ 	Y203	FRUSEMIDE TAI			Drug	500.00		
	District TestDistrict1	~		Y204	KETOCONAZOLE			Drug	800.0		
Save										Cancel	

Fig. 44: Image 50 - 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, Overrule, which can be used to overrule the pre-set price. By clicking once on the row desired item in the overrule 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 (*Image 51 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

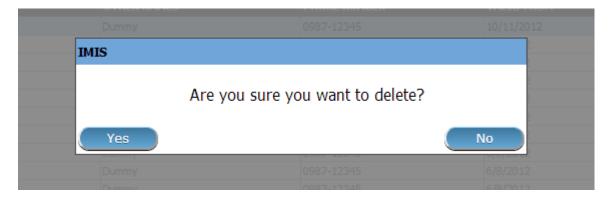


Fig. 45: Image 51 - Delete confirmation- Button Panel

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.

7.3.7 Users administration

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

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.

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.

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No V	17	v16.3.0
Current User	Products					
Jiri Nemec (jiri) Roles Enrolment Officer	Health Facilities					
Manager Accountant Clerk	Price Lists					
Medical Officer Scheme Administrator IMIS Administrator	Medical Services					
Receptionlist Claim Administrator Claim Contributor	Medical Items					
District	Users					
Dummy Kongwa Babi	Enrolment Officers					
Dodoma Kilosa	Claim Administrators					
Basel Mpapwa Matematika	Payers					
Kalal Msalala Bamenda	Locations					

Fig. 46: Image 52 - Navigation Users

elect Criteri	a				
Jser Details					
La	st Name	Other Names		RegionSelect Region	
Δ					
Logi	in Name	Roles Se	lect Role 🗸	District	Mistorical
Phone	Number	HF Name Se	elect HF Code 🗸	Language Select Lang	uage 🗹 🖉 Search
					Search
				Email	
4 Users Fou	nd				
OGIN NAME	LAST NAME	OTHER NAMES	PHONE NUMBER	VALID FROM	VALID TO
<u>Admin</u>	Admin	Admin		21/04/2017	
dex	Alex	Alex		11/06/2017	
amien	Revault	Damien		20/12/2016	
nwezaura	Rwezaura	Elizeus		07/11/2016	
sact	Software	Exact	0768108131	11/05/2017	
corge	George	Atohmbom Yuh		04/11/2016	
eorgebda	Yuh George	Atohmbom		11/11/2016	
<u>ideon</u>	Christopher	Gideon		23/02/2017	
nomias	Simon	Gidion		08/11/2016	
iren	Soni	Hiren		06/06/2017	
<u>tan</u>	Charles	Jean		21/04/2017	
ri	Nemec	Jiri		16/06/2017	
	Nemec	Jiri		05/11/2016	
riAccountant		Jiri		05/11/2016	
riAccountant riClaimadmin riClerk	Nemec	Jiri		05/11/2016	

Fig. 47: Image 53 - 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 (*Image 52 - Navigation Users*).

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 (*Image 54 - Historical records - Result Panel*).

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

Fig. 48: Image 54 - 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
<u>Admin</u>	Admin	Admin	123456789	16/08/2012	
<u>Admin</u>	Admin	Admin	1234567890	10/08/2012	10/08/2012
<u>Admin</u>	Admin	Admin	-	10/08/2012	-10/08/2012
Admin	Admin	Admin	123456789	10/08/2012	-13/08/2012
<u>Admin</u>	Admin	Admin	123456789	13/08/2012	-13/08/2012
Admin	Admin	Admin	123456789	13/08/2012	-15/08/2012

Fig. 49: Image 55 - 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 (*Image 55 - Selected record (blue), hovered records (yellow) - Result Panel*). 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 (*Image 56 - Page selector- Result Panel*)



Fig. 50: Image 56 - 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 *User 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

Home Insurees and Policies Cl	aims Administration Tools My profil	e Logout <u>Search I</u>	nsurance No V ? v16.3.0
User Details Language Select Language Other Names Last Name Phone Number Email Login Name Password Confirm Password HF Name Select HF Code	ROLE Enrolment Officer Manager Accountant Clerk Medical Officer Scheme Administrator IMIS Administrator Receptionlist Claim Administrator Claim Contributor	Check All Region Region Region South West Central	Check All District District Dummy Kongwa Bahi Dodoma Basel Kilosa Mpapwa Kailali Bamenda Bambui Kumbo Buea Mamfe Morogoro
Save			Cancel

Fig. 51: Image 57 - User Page

• Language

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)

• 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.

• 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.

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 (*Image 58 - Delete confirmation- Button Panel*) is displayed, this requires the user to confirm if the action should really be carried out.

IMIS		
	Are you sure you want to delete?	
Yes		No

Fig. 52: Image 58 - Delete confirmation- Button Panel

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

7.3.8 Enrolment Officers Administration

Enrolment Officers administration is restricted to users with the role of Scheme Administrator.

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.

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No 🔻 돈	2	v16.3.0
Current User	Products					
Jiri Nemec (jiri) Roles Enrolment Officer	Health Facilities					
Anager Accountant Clerk	Price Lists					
Nedical Officer Scheme Administrator	Medical Services					
IMIS Administrator Receptionist Claim Administrator	Medical Items					
Claim Contributor District	Users					
Dummy Kongwa Bahi	Enrolment Officers					
Dedoma Kilosa	Claim Administrators					
Basel Mpapwa	Payers					
Kalali Msalala Ramenda	Locations					

Fig. 53: Image 59 - Navigation Enrolment Officers

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 (*Image 60 - 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.*

	Insurees and Policies	Claims Administrat	tion Tools	My profile Lo	gout <u>Se</u>	earch Insuran	ce V	?
elect Cri	iteria							
nrolment Off	ficers Details							
	Last Name	Ot	her Names		Re	gionSelect R	egion 🗸	
4								
	Code	Birth	Date From		De	strict	~	
	Email	Bir	th Date To		Phone Nur	nber		Search
Enrolm	ent Officers Found							
CODE	LAST NAME	OTHER NAMES	BIRTH DATE	PHONE NUMBER	REGION	DISTRICT	VALID FROM	VALID TO
agent	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	
005	Shakespeare	Magi	26/12/1988		TestRegion	TestDistrict3	09/05/2017	
E005	Cook	John	14/06/1994		TestRegion		07/06/2017	
E010	Black	James	14/06/1994		National		07/06/2017	
E1001	Ngaiza	Allen	13/05/1985	0768108131	Region	Dodoma	17/05/2017	

Fig. 54: Image 60 - Enrolment Officers Control Page

• 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 (image61); 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.

er, 2012 → 4 2012 →
Th Fr Sa
30 31 1 Jan Feb Mar Apr
6 7 8
13 14 15 May Jun Jul Aug
20 21 22
27 28 29
4 5 6 Sep Oct Nov Dec
ber 6, 2012 Today: September 6, 2012

Image 61 - 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 (*Image 62 - Historical records - Result Panel*).

CODE	LAST NAME	OTHER NAMES	BIRTH DATE	PHONE NUMBER	REGION	DISTRICT	VALID FROM	VALID TO
<u>agent</u>	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	
E002	Shark	- John	12/06/1984	-	-TestRegion	-TestDistrict1	09/05/2017	-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	
E006	Bruno	Kate	25/12/2016	-	Region	-Dodoma	09/05/2017	-09/05/2017
E006	Bruno	Kate	-25/12/2016	-	Region	-Dodoma	09/05/2017	-09/05/2017
E007	Cook	John	14/06/1994		TestRegion		07/06/2017	
E010	Black	James	14/06/1994		National		07/06/2017	

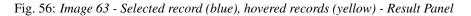
Fig. 55: Image 62 - Historical records - Result Panel

• 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
agent	agent	agent			Maritime	Préfecture du Golfe	05/06/2017	
E001	Fex	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	Allen	13/05/1985	0768108131	Region	Dodoma	17/05/2017	



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 (*Image 63 - Selected record (blue), hovered records (yellow) - Result Panel*). 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 (*Image 64 - Page selector- Result Panel*)



Fig. 57: Image 64 - 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 *Enrolment Officer 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

Home Insurees and	l Policies Claims	Administration Tools M	ly profile Logout	Search Insurance V 🕑 🛛 🛛
Enrolment Officers Details			Check All	Check All
Code	E005		Municipality	Village
Other Names	Magi		MUNICIPALITY	VILLAGE
			TestMunicipality3	
Last Name	Shakespeare		✓ TestMunicipality3	
Birth Date	26/12/1988		✓ TestMunicipality3	
Phone Number		Communicate	TestMunicipality3	
Phone Wullder				TestVillage332
Email				TestVillage333
Permanent Address Details	\sim			
Region	TestRegion 🗸			
District	TestDistrict3			
Substitution	Select Enrolment C 🗸			
Works To				
)		
Feedback Collector Details				
Code				
Last Name				
Other Names				
Phone Number				
Date of Birth	0			
Save				Cancel
				Cunter

Fig. 58: Image 65 - 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.*

2. Saving

Once all mandatory data is entered, clicking on the Save button will save the record. The user will be redirected 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 manditory fields.

Deleting an Enrolment Officer

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

Before deleting a confirmation popup (*Image 66 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

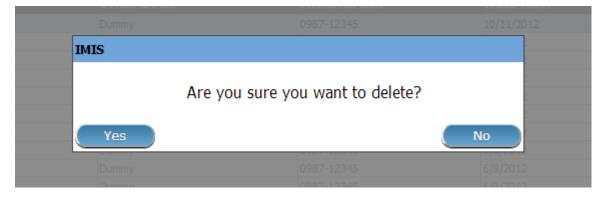


Fig. 59: Image 66 - Delete confirmation- Button Panel

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

7.3.9 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 role of Scheme Administrator.

Pre-conditions

A claim administrator may be added after the agreement of a contractual health facility and the management of the scheme administration.

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*.

Claim Administrators Control Page

The Claim Administrators Control Page is the central point for all claim administrators administration. By having access to this panel, it is possible to add, edit, delete and search claim administrators. The panel is divided into four panels (*Image 68 - Claim Administrators Control Page*).

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

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No 🔻 🕒	17	v16
Current User	Products					
Iri Nemec (jiri) Roles Enrolment Officer	Health Facilities					
lanager .ccountant Jerk	Price Lists					
ledical Officer cheme Administrator MIS Administrator	Medical Services					
eceptioniist Iaim Administrator	Medical Items					
laim Contributor istrict ummy	Users					
ngwa shi	Enrolment Officers					
odoma fosa	Claim Administrators					
asel Ipapwa	Payers					
alali salala	Locations					

Fig. 60: Image 67 - Navigation Claim Administrators

	Insurees and Policies	Claims Administration	Tools My profile	e Logout	Search Insuran	ce No 🔽 🕨	? v16.
elect Cri	iteria						
Claim Adminis	strator Details						
Δ	Last Name	Other Names			HF Code Select H	IF Code 🔻	
H							Historical
	Code	Birth Date From		Pho	ne Number		- Historica
	Email	Birth Date To					Search
3 Claim	Administrators Foun	d					
ODE	LAST NAME	OTHER NAMES	HF CODE	BIRTH DATE	PHONE NUMBER	VALID FROM	VALID TO
F555501	John	Esther	HF55551	08/06/1990		07/11/2016	VALID TO
F555502	George	Julius	HF55552	17/01/2000		07/11/2016	
	Jihnson	Salome	HF55553	20/07/1988		07/11/2016	
EP CA 1	Bahadur	Ram	NEP_HF02	10/11/1994	9851099999	07/11/2016	
100	Madrago	Stanley	H10001	11/06/1974	+255 (0) 2356 7888	26/10/2016	
101	Karama	Alex	P10001	31/01/1990		27/10/2016	
102	Fulton	Peter	H10011	12/06/1984		29/11/2016	
(103	Clinton	Jane	P10011	12/06/1984		29/11/2016	
(104	Trump	Hillary	P10012	12/06/1984		29/11/2016	
105	Clinton	Hillary	H1003	14/06/1994		12/12/2016	
106	Johnson	Donald	C0001	12/06/1984		12/12/2016	
(107	Bamba	Jane	C0001	27/06/1984		12/12/2016	
(108	Beyonce	Jane	P0003	14/06/1994		12/12/2016	

Fig. 61: Image 68 - Claim Administrators Control Page

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 (image69); 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.

	Se	pte	mbei	r , 20 1	12	►
ı	Мо	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
٦	Today	: Sep	otemb	er 6,	2013	2

Image 69 - 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 70 - Historical records - Result Panel*).

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

Fig. 62: Image 70 - 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 (*Image 71 - Selected record (blue), hovered records (yellow) - Result Panel*). 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	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	Backhurst	Paul	11/06/1963	0784548321	Bahi	12/08/2012	
20030099	Kasekenya	Naomi Msongwe	02/03/1955	0756200200	Dodoma	16/08/2012	
3014002	rwantungamo	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	
0000000	10.1	a	10110010	0.0000000000000000000000000000000000000	12	an loo loo an	

Fig. 63: Image 71 - 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 (*Image 72 - 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 *Claim Administrator Page*, the button panel (the buttons Edit and Delete) is used in



Fig. 64: Image 72 - Page selector- Result Panel

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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	7 v16.3.0
Claim Admin	nistrator Details							
	Code							
	Other Names							
	Last Name							
	Date of Birth							
	Phone Number							
	Email							
	HF Code Select HF	Code 🔻						
Save								Cancel

Fig. 65: Image 73 - 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.

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 (*Image 74 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out.

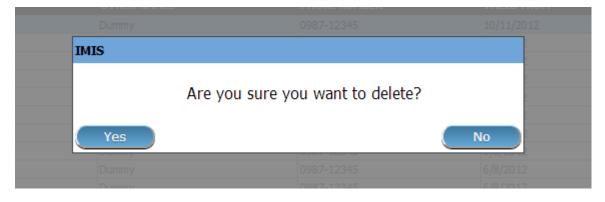


Fig. 66: Image 74 - Delete confirmation- Button Panel

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

7.3.10 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

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No 🔻 돈	17	v10
Current User	Products					
iri Nemec (Jiri) Roles Inrolment Officer	Health Facilities					
anager ccountant erk	Price Lists					
edical Officer heme Administrator IIS Administrator	Medical Services					
ceptionlist iim Administrator	Medical Items					
sim Contributor strict mmy	Users					
ingwa hi	Enrolment Officers					
odoma losa	Claim Administrators					
asel papwa	Payers					
stat salala	Locations					

Fig. 67: Image 75 - Navigation Payers

	Insurees and Pol	licies Clai	ims Administration	Tools My profile	Logout	Search Insurance		2
elect Cr	riteria							
Payer Details	s							
	Name		Region	Select Region 🗸		District	~	
Α	Email		Type	Select Payer Type 🗸	Ph	one Number		Historical
	Linai		Type	- Gelect Tayer Type				Const
								Search
Payers	Found							
NAME		ТҮРЕ	ADDRESS DETAILS	REGION	DISTRICT	PHONE NUMBER	VALID FROM	VALID TO
PORALG		G	Dodoma, str. Liberty	National		+312456345	08/05/2017	
	fice Region	L	Dodoma, street Victory	National		+2345516666	08/05/2017	
istrict offic	e Dodoma	L	Dodoma, str. Station	Region	Dodoma	+324456789	08/05/2017	
B								

All functionality for use with the administration of payers can be found under the main menu Administration, sub menu Payers.

Fig. 68: Image 76 - Payers Control Page

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 (*Image 76 - Payers Control Page*).

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.

• 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 (*Image 77 - Historical records - Result Panel*).

NAME	түре	ADDRESS DETAILS	REGION	DISTRICT	PHONE NUMBER	VALID FROM	VALID TO
PORALG	G	Dodoma, str. Liberty	National		+312456345	08/05/2017	
Provincial office Region	L	Dodoma, street Victory	National		+2345516666	08/05/2017	
Provincial office Region	£	Dodoma, str. Victory	Region	-	+2345516666	08/05/2017	-08/05/2017
District office Dodoma	L	Dodoma, str. Station	Region	Dodoma	+324456789	08/05/2017	

Fig. 69: Image 77 - 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
PORALG	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

Fig. 70: Image 78 - 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 (*Image 78 - Selected record (blue), hovered records (yellow) - Result Panel*). 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 (*Image 79 - Page selector- Result Panel*).



Fig. 71: Image 79 - 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 *Payer 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

• 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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance V	17
Payer Detail	s							
	Type Governmen	t	~					
	Name PORALG							
		tr. Libert	F.V.					
	boundy b		~					
	Address							
			~					
	Region National		~					
	District		~					
	Phone Number +312456345	5						
	Fax +312367999	99						
	Email							
Save								Cancel

Fig. 72: Image 80 - Payer Page

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 (*Image 81 - Delete confirmation- Button Panel*) 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.

7.3.11 Locations Administration

Administration of locations is restricted to users with the role of Scheme Administrator.

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.

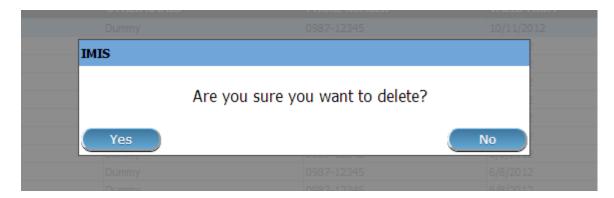


Fig. 73: Image 81 - Delete confirmation- Button Panel

Navigation

All functionality for use with the administration of locations can be found under the main menu Administration, sub menu Locations.

Home Insurees and Policies Claims	Administration Tools	My profile	Logout	Search Insurance No ү ⊵	2	v
Current User	Products					
Jiri Nemec (jiri)						
Roles	Health Facilities					
Enrolment Officer Manager						
Accountant	Price Lists					
Clerk						
Medical Officer						
Scheme Administrator	Medical Services					
IMIS Administrator						
Receptionlist Claim Administrator	Medical Items					
Claim Contributor						
District	Users					
Dummy						
Kongwa	Enrolment Officers					
Bahi						
Dodoma Kifosa	Claim Administrators					
Basel						
Npapwa	Payers					
Kailali						
Msalala	Locations					
Bamenda						

Fig. 74: Image 82 - Navigation Locations

Clicking on the sub menu Locations re-directs the current user to the 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 (*Image 83 - Locations Page*). 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

16 Regi	on(s)	4 Distric	t(s)	5 Munici	ipality(s)	3 Vill	age(s)				
CODE	NAME	CODE	NAME	CODE	NAME	CODE	NAME	м	o	F	FAN
R0001	Region	D0018	TestDistrict1	W0029	TestMunicipality11	V0057	TestVillage111	L			
R0002	North West	D0019	TestDistrict2	W0030	TestMunicipality12	V0058	TestVillage112	2			
R0003	South West	D0020	TestDistrict3	W0044	TestMunicipality14	V0059	TestVillage113	3			
R0004	Central	D0034	TestDistrict5	W0045	TestMunicipality15						
R0005	Capital			W0031	TestMuniciplaity13						
R0006	TestRegion										
R0007	Singida										
R0008	Maritime										
R0009	Plateaux										
A010 R0011	Central										
R0011	Kara										
R0012	Savanes										
R0013	Togo Délégation Générale (Nationale)										
R0014	Sud Kivu										
R0015	TestRegion2										
R0016	East West										

Fig. 75: Image 83 - Locations Page

It has four buttons, Add, Edit, Delete and Move for actions on the locations and the Cancel button for re-directing to the *Home Page*.



Fig. 76: Image 84 - Action Buttons - Locations Page

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.

1. Cancel

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

Adding a Region, District, Municipality, Village

Focusing on the appropriate level of locations by clicking on the black or the empty bar on the top of the appropriate panel and clicking on the Add button will open up in the top of the screen an empty 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 (*Image 85 - Delete confirmation – Location Page*) is displayed, which requires the user to confirm if the action should really be carried out?

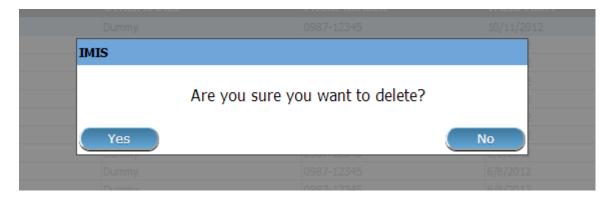


Fig. 77: Image 85 - Delete confirmation – Location Page

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 re-direct to the Move Location Page (*Image 86 - Move Location Page*).

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search 1	nsur	ance No 🔻 돈	?	v16.3.0
	RegionSelect Region- V District V cipality V		RegionSelect Region District		Region	C	gion- V		REGION Region North West South West		
F											Cancel

Fig. 78: Image 86 - Move Location Page

The Move Location Page is divided into six panels.

1. Locations Panels (A,B,C,D)

The pair of A and B panels is used for moving of a village to another municipality. The pair of B and C panels is used for moving of a municipality to another district. The pair C and D is used for moving a district to another region.

For moving a location, select a location (village, municipality, district) in two adjacent panels by selecting of higher level locations in the fields Region, District, Municipality and clicking on the selected location (village, municipality, district) in a panel and on a new parent location in the next panel.

Actual moving of a location into a new parent locations is done by clicking on the green arrow between the two corresponding location panels.

5. Button Panel

It has only the Cancel button for re-directing to the *Location Page*.

6. Information Panel

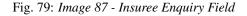
The Information Panel is used to display messages back to the user. Messages will occur once a district, municipality or village has been moved or if there was an error at any time during the process of this action.

7.4 Insurees and Policies

7.4.1 Insuree Enquiry

This functionality is available to users will all roles. 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".

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No V	2	v16.3.0



By typing in a valid insurance number and pressing the enter key or clicking on the green search button, a pop-up will appear (*Image 87 - Insuree Enquiry Field*), 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.

7.4.2 Find Family

Access to the Find Family Page is restricted to users with the role of Accountant, Clerk and Health Facility Receptionist.

Pre-conditions

Need to enquire on, or edit a family and/or insurees, policies and contributions associated.

of NAME	отн	ER NAME	S	GEI	IDER	BIRTH DATE
			000	• • • • • • • • • • • • • • • • • • •	5 5	
ASTER F	Last Name Other Names					
II STARY DATE SERVICE	Birth Date	09-09-8	OLMENT OFFICER			
	Gender	M				6,600.0
PRODUCT PRODUCT NAME	EXPIRE DATE		HOSPITAL DEDUCTION	NON-HOSPITAL DEDUCTION	HOSPITAL CEILING	NON-HOSPITAL CEILING
P-1-1 _{PAID} BY Product 1 in District 1	13/09/2013	A	0.00	OUNT		00.00

Fig. 80: Image 88 - Insuree Enquiry Results

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No 🔻 돈	7	v16.3.0
Current User	Add Family/Group								
Roles Enrolment Offi	Families/Groups								
Manager Accountant Clerk	Insurees								
Nedical Officer Scheme Admin									
IMIS Administr Receptionlist	Contributions								
Claim Administ Claim Contribut District									
Dummy Kongwa									

Fig. 81: Image 89 - Navigation - Families - Find Family

Home	Insurees and Policies	Claims Admini	stration Tools	My profile	Logout	Search In	surance		7
Select C									
	p Last Name urance Number Phone Number Gender Select Gen Email Email	der V P	Other Names	ect Yes/No		Region Te: District Te: Municipality Te: Village Te:	stDistrict2 stMunicip	ality21 🔽	Historical Search
INSURANCE		OTHER NAMES	REGION	DISTRICT	MUNICIPALITY	VILLAGE	POVERTY	VALID FROM	VALID TO
108010801 00013 111111161 B11111151		Alila Lenon James Jane	TestRegion TestRegion TestRegion TestRegion	TestDistrict2		-	No No Yes Yes	30/05/2017 24/05/2017 23/05/2017 22/05/2017	
С									Cancel
D									

Fig. 82: Image 90 - Find Families

Navigation

Find Family can be found under the main menu Insurees and Policies sub menu Families/Groups

Clicking on the sub menu Families/Groups re-directs the current user to the Find Family Page.

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 (*Image 90 - Find Families*):

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 (image91) 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.

	Se	pte	mbei	, 20 :	12	•
Su	Мо	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
٦	Foday	: Sep	otemb	er 6,	2013	2

Image 91 - 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 (*Image 92 - Historical records - Result Panel*).

INSURANCE NUMBER	LAST NAME	OTHER NAMES	REGION	DISTRICT	MUNICIPALITY	VILLAGE	POVERTY	VALID FROM	VALID TO
111111199	-Bock	John	- TestRegion	TestDistrict1	-TestMunicipality12	-TestVillage122	Yes	-18/06/2017	-18/06/201 7
<u>111111199</u>	-Bock	- John	-TestRegion	-TestDistrict1	-TestMunicipality12	- TestVillage122	Yes	-18/06/2017	-18/06/2017
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	Alila	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	No	30/05/2017	

Fig. 83: Image 92 - 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	Alifa	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	
11111151	Queen	Jane	TestRegion	TestDistrict2	TestMunicipality21	TestVillage211	Yes	22/05/2017	

Fig. 84: Image 93 - 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 (*Image 93 - Selected record (blue), hovered records (yellow) - Result Panel*). 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 (*Image 94 - Page selector- Result Panel*)



Fig. 85: Image 94 - 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.

7.4.3 Find Insuree

Access to the Find Insuree Page is restricted to users with the role of Accountant, Clerk and Health Facility Receptionist.

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.



Fig. 86: Image 95 - Navigation 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 insurees based on specific criteria. The panel is divided into four panels (*Image 96 - Find Insuree Page*)

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.

	eria									
nsuree										
	Last Name		Other N	ames			F	Region TestRegion	~	
4										
Insura	nce Number		Birth Date	From			D	District TestDistrict	2 🗸	
									- 12 - 24	Historic
Ph	one Number		Birth Da				Munic	ipality TestMunici	pality21 🗸	_
	Email		G	ender Se	elect Gender	· v	\ \	/illage TestVillage	211 🗸	Search
Pho	oto Assigned All	~	Marital S	tatus Se	elect Status	\sim				
4 Insuree	es Found						-	-	_	
NSURANCE		OTHER NAMES	MARITA	GENDER		DATE OF	REGION	DISTRICT		
NSURANCE IUMBER	LAST NAME	OTHER NAMES	MARITA	GENDER	NUMBER E	BIRTH	REGION	DISTRICT	VALID FROM	VALID TO
INSURANCE NUMBER 00010	LAST NAME Backust	Paul	MARITAI STATUS	M	NUMBER E	BIRTH 24/05/2017	TestRegion	TestDistrict2	24/05/2017	VALID TO
INSURANCE NUMBER 200010 108010801	LAST NAME Backust Joseph	Paul Alila	STATUS	M M	NUMBER E	BIRTH 24/05/2017 03/05/1987	TestRegion TestRegion	TestDistrict2 TestDistrict2	24/05/2017 30/05/2017	VALID TO
INSURANCE NUMBER 20010 108010801 1012	LAST NAME Backust Joseph Paul	Paul Alila Lidya	W	M M F	NUMBER 2 2 0 3	BIRTH 24/05/2017 03/05/1987 30/05/2017	TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017	VALID TO
INSURANCE NUMBER 20010 108010801 012 0013	LAST NAME Backust Joseph Paul Paul	Paul Alila Lidya Lenon	W	M M F M	NUMBER E 2 0 3 2 2	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017	TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 24/05/2017	VALID TO
INSURANCE NUMBER 20010 108010801 0012 20013 111111164	LAST NAME Backust Joseph Paul Paul Pick	Paul Alila Lidya Lenon Patricie	STATUS W S	M M F M F	NUMBER E 2 0 3 2 2 1	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013	TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 24/05/2017 23/05/2017	
INSURANCE NUMBER 00010 08010801 012 0013 111111164 111111163	LAST NAME Backust Joseph Paul Paul Pick Pick	Paul Alila Lidya Lenon Patricie John	STATUS W S S S	M M F M F M M M	NUMBER E 2 0 3 2 2 1 1	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 24/05/2017 23/05/2017 23/05/2017	
4 Insured INSURANCE 20010 108010801 2012 20013 111111164 111111163 111111163	LAST NAME Backust Joseph Paul Paul Pick Pick Pick	Paul Alila Lidya Lenon Patricie John Elise	STATUS W S S M	M M F M F M F	NUMBER E	24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017	VALID TO
INSURANCE NUMBER 20010 108010801 2012 20013 111111164 111111163 111111162 111111161	LAST NAME Backust Joseph Paul Paul Pick Pick Pick Pick Pick	Paul Alila Lidya Lenon Patricie John Elise James	STATUS W S S M M M	M M F M F F M F M	NUMBER E	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993 13/07/1995	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017	VALID TO
INSURANCE NUMBER 20010 0012 0013 111111164 111111163 111111161 111111161 111111154	LAST NAME Backust Joseph Paul Paul Pick Pick Pick Pick Pick Queen	Paul Aila Lidya Lenon Patricie John Elise James Loren	STATUS W S S S M M S S	M M F M F F M F F	NUMBER 8	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993 13/07/1995 21/05/1999	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 22/05/2017	VALID TO
INSURANCE NUMBER 20010 108010801 108010801 1012 1012 101	LAST NAME Backust Joseph Paul Paul Pick Pick Pick Pick Pick Queen Queen	Paul Alila Lidya Lenon Patricie John Elise James Loren Sonja	STATUS W S S M M S S S S S	M M F M F F M F F F F	NUMBER E	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993 13/07/1995 21/05/1999 21/05/1999	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 22/05/2017 22/05/2017	
INSURANCE NUMBER 20010 008010801 0012 0013 11111164 11111163 111111161 11111154 11111155 111111155	LAST NAME Backust Joseph Paul Pick Pick Pick Pick Pick Queen Queen Queen	Paul Alila Lidya Lenon Patricie John Elise James Loren Sonja John	STATUS W S S S M M S S S S M M	M M F F F F M F F F F M	NUMBER E 2 3 3 3 2 2 1 1 1 1 0 0 1 1 2 2 2 2 2 2 2 2 0 0 0	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993 13/07/1995 21/05/1999 21/05/1999 06/05/1999	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 22/05/2017 22/05/2017 22/05/2017	
INSURANCE NUMBER 20010 108010801 012 00013 111111164 111111163 111111161 111111161 111111154 111111155 111111155	LAST NAME Backust Joseph Paul Pick Pick Pick Pick Queen Queen	Paul Alila Lidya Lenon Patricie John Elise James Loren Sonja John Jack	STATUS W S S M M S S S M M S S	M M F M F F M F F M F M M M	NUMBER E 2 0 0 3 2 2 1 1 1 0 0 1 1 2 2 2 2 2 2 2 2 2 0 0 0 1 1	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993 13/07/1995 21/05/1999 21/05/1999 19/05/1999	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 22/05/2017 22/05/2017 22/05/2017 22/05/2017	VALID TO
INSURANCE NUMBER 20010 008010801 0012 0013 11111164 11111163 111111161 11111154 11111155 111111155	LAST NAME Backust Joseph Paul Pick Pick Pick Pick Pick Queen Queen Queen	Paul Alila Lidya Lenon Patricie John Elise James Loren Sonja John	STATUS W S S S M M S S S S M M	M M F F F F M F F F F M	NUMBER E 2 0 3 3 2 2 1 1 1 1 1 2 2 2 2 2 0 0 1 1 1 1 1 1	BIRTH 24/05/2017 03/05/1987 30/05/2017 24/05/2017 11/06/2013 14/06/2016 09/05/1993 13/07/1995 21/05/1999 21/05/1999 06/05/1999	TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion TestRegion	TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2 TestDistrict2	24/05/2017 30/05/2017 24/05/2017 23/05/2017 23/05/2017 23/05/2017 23/05/2017 22/05/2017 22/05/2017 22/05/2017	VALID TO

Fig. 87: Image 96 - Find Insuree Page

• 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 (image97) 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.

4	Se	pte	mbe	r , 20 :	12	►
Su	Мо	Tu	We	Th	Fr	Sa
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2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
т	Today	: Ser	otemb	oer 6,	201	2

Image 97 - 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 (*Image 98 - Historical records - Result Panel*)

INSURANCE NUMBER	LAST NAME	OTHER NAMES	MARITAL STATUS	GENDER	PHONE NUMBER	DATE OF BIRTH	REGION	DISTRICT	VALID FROM	VALID TO
<u>111111199</u>	Bock	- John	H	H	-	30/01/1990	-TestRegion	-TestDistrict1	-18/06/2017	18/06/2017
<u>111111199</u>	Bock	-John	н	H	-	30/01/1990	-TestRegion	-TestDistrict1	-18/06/2017	18/06/2017
10008	Jackson	Ester	S	Μ		26/05/1989	TestRegion	TestDistrict1	26/05/2017	

Fig. 88: Image 98 - 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 (*Image 99 - Selected record (blue), hovered records (yellow) - Result Panel*). 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	HARITAL	GENDER	PHONE	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	м		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	м	м	+420234567567	12/06/1984	TestRegion	TestDistrict1	10/05/2017	
11111125	Bockwurst	Peter	s	м		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	

Fig. 89: Image 99 - 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 (*Image 100 - Page selector- Result Panel*)

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

Fig. 90: Image 100 - 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 insuree has been added, updated or deleted or if there was an error at any time during the process of these actions.

7.4.4 Find Policy

Access to the Find Policy Page is restricted to users with the role of Accountant, Clerk or Health Facility Receptionist.

Pre-conditions

Need to enquire on, or edit a policy, and the family/group, insurees and contributions associated.

Navigation

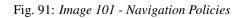
Find Policy Page can be found under the main menu Insurees and Policies, sub menu Policies.

Clicking on the sub menu Policies re-directs the current user to the find policy page.

Find Policy Page

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 (*Image 102 - Find Policy Page*)

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No 🔻 돈	2	v16.3.0
Current User Jiri Nemec (jiri									
Roles Enrolment Offi	Families/Groups								
Manager Accountant Clerk	Insurees								
Nedical Officer Scheme Admin									
IMIS Administr Receptionlist Claim Administ	Contributions								
Claim Contribu District									



elect C	iteria											
Policy												
	ent Date From			Effective Da	te From			Region Te	estRegion		\checkmark	
Α	Iment Date To			Effective	D-4- T-			District T	estDistrict1		\checkmark	
Enro	Siment Date To			Effective	Date To			District	sidistrict		•	
S	tart Date From			Expiry Da	te From			Туре -	- Select Ty	ре	~	Historica
	Start Date To			Evelo	Date To				Inactive In			
	Start Date 10			Expiry					Inactive In	suree	° (Search
En	rolment Officer S	elect Enrolment	C 🗸		Product	Select Product 🗸		Balance				
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4 - 0 - 11 - 1		elect Status	✓				_	_	_		_	_
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	es Found			CYDIRY			BOLTCY	ROL LCV			VALTO	
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ENROL DATE 14/06/2017 29/05/2017 29/05/2017 25/05/2017	es Found NAME Fuchs Konrad Glenn Gilmour Glenn Gilmour	EFFECTIVE DATE 14/06/2017 01/08/2017 01/08/2017 25/05/2017	START DATE 14/06/2017 01/08/2017 01/08/2017 01/07/2017	DATE 13/06/2018 31/07/2018 31/07/2018	NF01 NX01-1 NX01 DX01	Black James Fox James Fox James	Active Active Active	VALUE 22,000.00 8,500.00 8,500.00	0.00 0.00 0.00	R R R N	14/06/2017 29/05/2017 29/05/2017	VALID TO
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Fig. 92: Image 102 - Find Policy Page

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^^ 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 (image103); 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.

```
September, 2012
                                                                               2010-2019
                        Þ
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4
                                              2012
                                                            Þ
Su Mo Tu We Th Fr
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                                                                                           2012
26 27 28 29 30 31
                       1
                                     Jan
                                           Feb
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                                                         Apr
           5 6
                   7
 2
    3
       4
                       8
 9
    10 11 12 13 14 15
                                                                       2013
                                                                              2014
                                                                                    2015
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                                           Jun
                                     May
                                                  Jul
                                                         Aug
16
       18
           19 20 21 22
   17
23
       25 26
               27
                   28 29
   24
                                           Oct
                                                  Nov
                                                        Dec
                                                                        2017
                                                                              2018
                                                                                     2019
                                                                                           2020
                                     Sep
30
                    5
                       6
     1
        2 3 4
  Today: September 6, 2012
                                                                         Today: September 6, 2012
                                      Today: September 6, 2012
```

Image 103 - 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 (*Image 104 - Historical records - Result Panel*)

ENROL DATE	NAME	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER		POLICY VALUE	BALANCE	түре	VALID FROM	VALID TO
14/06/2017	Fuchs Konrad	-	-14/06/2017	-13/06/2018	NF01	Black James	Idle	22,000.00	22,000.00	R	14/06/2017	-14/06/2017
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	
<u>30/05/2017</u>	Fuchs Konrad	30/05/2017	30/05/2017	-29/05/2018	NF01	Fox James	Active	21,000.00	21,000.00	₩	29/05/2017	-29/05/201 7
30/05/2017	Fuchs Konrad	-	30/05/2017	29/05/2018	NF01	Fox James	Idle	24,000.00	21,000.00	₩	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	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	
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
29/05/2017	Glenn Gilmour	-	01/08/2017	31/07/2018	NX01-1	Fox James	Idle	8,500.00	8,500.00	R	29/05/2017	-29/05/2017
20/05/2017	d cil		41/00/2017	24/07/2010	AD204 4	C 7	T_11_	4 250 00	4 250 00	•	20/05/2017	20/05/2017

Fig. 93: Image 104 - 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 (*Image 105 - Selected record (blue)*, *hovered records (yellow) - Result Panel*). 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 (*Image 106 - Page selector- Result Panel*)

ENROL DATE	NAME	EFFECTIVE DATE	START DATE	EXPIRY DATE	PRODUCT	ENROLMENT OFFICER	POLICY	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	Ν	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	

Fig. 94: Image 105 - Selected record (blue), hovered records (yellow) - Result Panel

First Page 11 12 13 14 15 16 17 18 19	9 20 Last Page
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Fig. 95: Image 106 - 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.

7.4.5 Find Contribution

Access to the Find Contribution Page is restricted to users with the role of Accountant or Clerk.

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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No 🔻 💽	2	v16.3.0
Current User									
Roles Inrolment Offi	Families/Groups								
Manager Accountant Clerk	Insurees								
Hedical Officer Scheme Admin									
MIS Administr Receptionlist Claim Administr	Contributions								
Jaim Administr									

Fig. 96: Image 107 - Navigation Contributions

Clicking on the sub menu Contributions re-directs the current user to the Find Contribution Page.

Contribution						
4	Payer	~	Payment Date From		RegionSelect Re	
	Payment Type Payme	ent Type 🗸	Payment Date To		District	✓
	Receipt No.		Contribution Paid			Search
3 Contr	ributions Found					
AYMENT D	DATE	CONTRIBUTION PAID	PAYER	PAYMENT TYPE	RECEIPT NO.	VALID FROM VALID TO
2/06/2017		22,000.00		Cash	nox1	14/06/2017
1/05/2017		27,000.00	Provincial office Region	Mobile Phone	rcd1	31/05/2017
9/05/2017		B,500.00		Cash	rxc1	29/05/2017
9/05/2017	1	8,500.00		Cash	rxc10	29/05/2017
6/05/2017		28,000.00	PORALG	Cash	Tddb	26/05/2017
6/05/2017		5,000.00		Bank Transfer	Fdb	26/05/2017
5/05/2017	1	8,000.00	PORALG	Bank Transfer	ncwu67	26/05/2017
4/05/2017		2,000.00	PORALG	Cash	fff	24/05/2017
4/05/2017		1,000.00	PORALG	Bank Transfer	dd	24/05/2017
4/05/2017		14,000.00		Bank Transfer	rww	24/05/2017
3/05/2017		90,099.00	Provincial office Region	Bank Transfer	ff	24/05/2017
2/05/2017	1	29,000.00		Mobile Phone	rc3	22/05/2017
1/05/2017		12,000.00		Cash	rc1	22/05/2017
7/05/2017		55.00	PORALG	Cash	55	17/05/2017
		2,000.00	PORALG	Cash	6781	24/05/2017

Fig. 97: Image - 108 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 insures, 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 (*Image - 108 Find Contribution Page*).

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 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 (image109); by default the calendar will show the current month, or the month of the currently selected date, with the current day high-lighted.

- 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.

	Se	pte	mbe	r , 20 :	12	×
Su	Мо	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
т	Today	. Ser	ntemb	ner 6	201	,
	-	_	otemb			-

Image 109 - Calendar Selector - Search Panel

• 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 (*Image 110 - Historical records - Result Panel*).

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	
01/05/2017	-21,000.00	-	-Cash	1x05	29/05/2017	29/05/2017
01/05/2017	21,000.00	-	-Cash	1x05	29/05/2017	29/05/2017
23/06/2016	-12,500.00	Provincial office Region	Bank Transfer	1x01	17/05/2017	17/05/2017
23/06/2016	- 12,500.00	Provincial office Region	Bank Transfer	1x01	17/05/2017	17/05/2017
22/06/2016	12,500.00		Cash	rt1	20/05/2017	
15/06/2016	-12,500.00	-	Mobile Phone	11/2	20/05/2017	20/05/2017
15/06/2016	12,500.00	-	Mobile Phone	1%2	20/05/2017	20/05/2017
30/05/2016	24.000.00		Cash	rx09	29/05/2017	

Fig. 98: Image 110 - Historical records - Result Panel

• Search Button

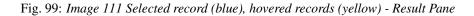
Once the criteria have been entered, use the Search button to filter the records, the results will appear in the Result Panel.

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 (*Image 111 Selected record (blue*), *hovered records (yellow) - Result Pane*) 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	17	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	n:09	29/05/2017
27/05/2016	12,000.00		Bank Transfer	rc2	22/05/2017



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 112 - Page selector- Result Panel*).

First Page 11 12 13 14 15 16 17 18 19 20 Last Pag	je
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Fig. 100: Image 112 - 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.

7.4.6 Family Overview

Access to the Family Overview Page is restricted to users with the role of Accountant or Clerk.

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 113 - Family Overview Page*)

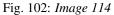
Home I	nsurees and Polic	cies Claim	s Administration	Tools My pro	ofile Logout	Search Insuran	ce V	?
amily/Gro	oup 👫 💋	Y 🗙						
Insurance	Number 111111151		Region Tes	stRegion	Poverty	Status Yes	Address Del	tails
	ast Name Queen		District Tes	stDistrict2	Confirmatio	n Type State		
A Othe	er Names Jane		Municipality Tes	stMunicipality21	Confirmati	on No. d1223		
			Village Tes					
			village res	stvillage211	_		_	_
nsurees								
INSURANCE NU	IMBER LAST NAME	_	OTHER NAMES	5	GENDER	BIRTH DATE	BENEFICIARY	CARD
11111151	Queen		Jane		F	15/06/1994	✓	
111111152	Queen		John		М	06/05/1999	\checkmark	
1111153	Queen		Getruda		F	12/06/1974		
P 111154	Queen		Loren		F	21/05/1999	\checkmark	
111111155	Queen		Sonja		F	21/05/1999	\checkmark	
111111156	Queen		Jack		М	19/05/1999	\checkmark	
Policies	EFFECTIVE DATE	START DATE	EXPIRY DATE PRODUC	T ENROLMENT OFF	TICER POLICY	STATUS POLICY VALUE	VALID FROM	VALID TO
22/05/2017	22/05/2017	22/05/2017	21/05/2018 NF01	James Ellis	Active	29,000.00	22/05/2017	
C	ons 😝 💋							
PAYMENT DATE	Ξ ΡΑΥ	'ER AMO	UNT PAYMENT T	YPE RE	CEIPT NO.	CONTRIBUTION CATEG	ORY	
22/05/2017		29,00	0.00 Mobile Phon	e rc3		Contribution		
D								
E							(Cancel
F								

Fig. 101: Image 113 - Family Overview Page

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/Group panel action buttons allow to add, edit and delete the family/group.





The green plus sign is for adding a new family/group.

The yellow pencil sign is for editing a family/group.

The red cross sign is for deleting a 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 (*Image 115* - *Selected record (blue), hovered records (yellow) – Insurees Panel*). The leftmost record contains a hyperlink which if clicked re-directs the user to the insure record for editing or detailed viewing

hyperlink which if clicked, re-directs the user to the insuree record for editing or detailed viewing.

INSURANCE NUMBER	LAST NAME	OTHER NAMES	GENDER	BIRTH DATE	BENEFICIARY CARD
111111151	Queen	Jane	F	15/06/1994	V
111111152	Queen	John	М	06/05/1999	V
111111153	Queen	Getruda	F	12/06/1974	
11111154	Queen	Loren	P. Contraction of the second se	21/05/1999	2
111111155	Queen	Sonja	F	21/05/1999	\checkmark
111111156	Queen	Jack	м	19/05/1999	8

Fig. 103: Image 115 - Selected record (blue), hovered records (yellow) - Insurees Panel

In the Insurees Panel, action buttons allow to add, edit and delete insurees belonging to the family/group.



Fig. 104: Image 116

The green plus sign is for adding a new insuree.

The yellow pencil sign is for editing an insuree.

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 (*Image 117 - Selected record (blue), hovered records (yellow) - Policy Panel*). 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	<u>P-2-7</u>	Edward John	Active	178,000.0	08/06/2012	
<u>02/06/2011</u>	21/06/2011	06/04/2012	03/09/2012	<u>P-2-9</u>	Msakio Sunday	Active	118,000.0	08/06/2012	

Fig. 105: Image 117 - 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).

Home Insurees and F	Poli 🤅	Ž			Product - In	nternet Explo	rer	
		👙 http://imis-mv. swisstph	-mis.ch/Product.aspx?p=8	381x=1				
Family/Group Image: Comparison of the second seco		Home Insu	rees and Policies	Claims	Administration	Tools	Logout	Search Insu
Last Name Faraji		Insurance Product details	5					
Other Names Asma		c	ode DXW001		Medical Services			
Insurees 😽	2	Na	me Waiting fixed enr	olment D				
INSURANCE NUMBER LAST NAME		Dist	trict Dodoma	\checkmark		Click I	here to load	Medical Services
333222111 Faraji		Date F	rom 01/01/2015					
			о 01/01/2031					
		Convers	sion Click button to lo	a 🔽 🔵	Medical Items			
Policies 📑 📝 🕻	X	Lump S	Sum 30	0,000.00				
ENROL DATE EFFECTIVE DATE	s	Threshold Memb	pers	3		Click	here to load	d Medical Items
03/03/2016 01/05/2016 03/03/2016 03/04/2016	0	Maximum Memb	pers	7				
		Contribution A	dult	5,000.00				
		Contribution C	hild	3,000.00	Account Code(Remuner	ation)		Account Code(Co
Contributions 🚦		Insurance Pe	riod	12	Registration Lump	o Sum		Assembly
	YER	Administration Pe	riod	0	Registratio	on Fee	10,000.00	Ass
03/03/2016		May Installmo	ante	3				

Fig. 106: Image 118 - Product Popup – Policies Panel

In the Policies Panel, action buttons allow to add, edit and delete policies.



Fig. 107: Image 119

The green plus sign is for adding a new policy.

The yellow pencil sign is for editing a policy.

The red cross sign is for deleting a policy.

- The blue R sign is for renewing a policy.
- 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 (*Image 120 - Selected record (blue)*, *hovered records (yellow)* -

Contributions Panel) 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	ก์	Contribution

Fig. 108: Image 120 - 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 (*Image 121 - Payer Pop up – Contribution Panel*) will open up showing the details of the payer in read-only mode.

Home Insurees and Policies Cl	laims Administration Tools My profile Logout <u>Search Insurance No</u>	7
Family/Group 🕂 📝 📉		
Insurance Number 00100109	Region TestRegion Poverty Status Address Det	tails
Last Name Mcharo	District TestDistrict1 Confirmation Type	
Other Names Prisca	Municipality TestMunicipality11 Confirmation No.	
	Village TestVillage111	
Insurees 📑 📝 📉		
INSURANCE NUMBER LAST NAME	OTHER NAMES GENDER BIRTH DATE BENEFICIARY	
00100109 Mcharo	🗅 Payer - Google Chrome 🗕 🗖	×
	imis-mv.swisstph-mis.ch/Payer.aspx?p=1&f=79&x=1	Q
	Home Insurees and Policies Claims Administration Tools My profile L	Logout
	Payer Details	
Policies 📑 📝 📉 🗈	Type Government	
ENROL DATE EFFECTIVE DATE START DAT	Name PORALG	
<u>17/07/2017</u> 17/07/2017	bouona, ser. Libercy	
01/10/2017		
	Address	
Contributions 🚦 🏹 🗙		
	Region National	
PAYMENT DATE PAYER 27/07/2017 PORALG	District	
PORALS	Phone Number +312456345	_ 1
	Fax +3123679999	
	Email	H
		• []
		-

Fig. 109: Image 121 - Payer Pop up - Contribution Panel

In the Contributions Panel, action buttons allow to add, edit and delete contributions.

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.



Fig. 110: Image 122

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

Home	Insurees and	d Policies C	laims	Administration	Tools	My profile	Logout	Search Insurance	?	
Family/Gro	up Details									
	Region	Select Region-	- V	Permanent Addres	s Details		$\hat{\mathbf{Q}}$			
	District		~							
	Municipality		~							
	Village		~							
	Poverty Status	Select Yes/No	- 🗸							
	Confirmation Type	Select Type	· ·	Confirma	tion No.					
		Select Type								
Policy Hold	ier Insurance Number									^
	Other Names									
	Last Name									
	Birth Date									
		Select Gender								
	Marital Status	Select Status	~							
	Beneficiary Card	Select Yes/No	🗸							
	Current Region	Select Region-	- ~					rowse		
	Current District		~							
Cu	urrent Municipality		~							
	Current Village		~							Ų
Curre	nt Address Details		~							Ň
Save									Cano	cel

Fig. 111: Image 123 - 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. Mandatory.

• 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. Mandatory.

• Beneficiary Card

Select from the list of card whether or not an insurance identification card was issued to the head of family/group. Mandatory.

• 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.

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 family member 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 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 insure to the family/group.

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 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

Home Insurees and Pol	icies Claims	Administration	Tools	My profile	Logout	Search Insurance		2
Insurance Number 111111151		Region Test	Region		Poverty Sta	atus Yes	Permanen Details	t Address
Last Name Queen		District Test	District2		Confirmation T	ype State		
Other Names Jane		Municipality Test	Municipality21		Confirmation	No. d1223		
		Village Test	Village211				_	
Change Family/Group								
Change Family/Group Details								
Region Test	Region 🗸							^
District Test	District2 🗸							
Municipality Test	Municipality21 🔽							
Village Test	Village211 🗸							
Poverty Status Yes	~							
Confirmation Type State	e 🗸							×
Change Head of Family/	Group							
Change Head of Family/Group Enter the new Head of								^
Family/Group Insurance			Ch	eck				Change 🗸 🗸
Move Insurees								
Move Insuree to Family/Group Enter the Insurance								~
Number of Insuree to			Check					Move 🗸 🗸
move								Cancel

Fig. 112: Image 124 - Change Family/Group Page

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 insure 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 insure will be displayed in the insure Information Panel.

Deleting a Family/Group

Click on the Red Cross Sign button to delete the currently selected record.

Before deleting a confirmation popup (*Image 125 - Delete confirmation- Button Panel*) 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.

IMIS		
Ar	e you sure you want to delete?	2
Yes		No
examiny.	0307 20010	ololina a

Fig. 113: Image 125 - Delete confirmation- Button Panel

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

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.

• Birth Date

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	7	
[Family/Grou	up Details								
In	surance Number 111111191			Region TestR	legion		Confirmation Type Municipality		
	Last Name Garbeight			District Test)istrict1		Confirmation No. 123456		
	Other Names James		Mun	icipality TestM	Iunicipality11	Pe	rmanent Address Details Str.		
	Poverty Status Yes			Village TestV	/illage111				
[Insuree									
	RelationshipSelect Re	lation 🔻							
Г	insurance Number								
	Other Names								
	Last Name								
	Birth Date								
	Gender Select Ge	ender 🔻							
	Marital Status Select Sta								
	Beneficiary Card Select Ye								
							Browse		
	Current RegionSelect Re								
	Current District	•							
Cu	irrent Municipality	•							
	Current Village	۲							
Currei	nt Address Details								
	ProfessionSelect Pro								
	EducationSelect Ed	ucation 🔻							-
Save								Cancel	D

Fig. 114: Image 126 - Insuree Page

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. Mandatory.

• Beneficiary Card

Select from the list of options whether or not the card was issued to the insure. Mandatory.

• Current Region

Select from the list of available regions the region, in which the insure temporarily stays.

• Current District

Select from the list of available districts the district, in which the insure 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 insure 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 insure 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 insure 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 insure 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 (*Image 127 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really becarried out?

IMIS		
Ar	e you sure you want to delete?	
Yes		No

Fig. 115: Image 127 - Delete confirmation- Button Panel

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

Policy Page

1. Data Entry

• 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

Home Insurees and Policies Claims	Administration	Tools My profile	Logout Search Insurance 🔻 💽 🛛 🔞
Family/Group Details			
Insurance Number 111111161	R	egion TestRegion	Confirmation Type Municipality
Last Name Pick	D	istrict TestDistrict2	Confirmation No.
Other Names James	Munici	pality TestMunicipality21	Permanent Address Details
Poverty Status Yes		illage TestVillage211	
Policy Details			
Enrolment Date			Policy Status
ProductSelect Product			
Effective Date]		
Start Date]		
Expiry Date]		
Enrolment Officer Select Enrolment C			
Policy Value	Contribution Paid	Balance	
General	In-Patient	Out-Patient	
Deductible			
Remunerated Health Care			
Save			Cancel

Fig. 116: Image 128 - Policy Page

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 (*Image 129 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

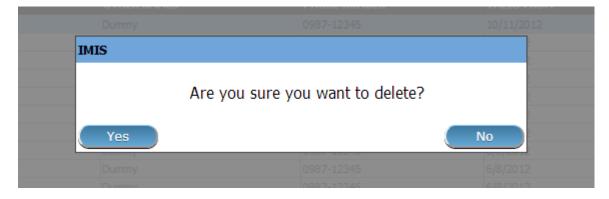


Fig. 117: Image 129 - Delete confirmation- Button Panel

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

Contribution Page

1. Data Entry

Home Insurees and Policies	Claims Adm	ninistration Tools	My profile	Logout	Search Insurance 🔻 돈	7
Family/Group Details Insurance Number 111111161 Last Name Pick Other Names James Poverty Status Yes		Region Tes District Tes Municipality Tes Village Tes	District2 Municipality21	Perma	Confirmation Type Municipality Confirmation No. nent Address Details	
Contribution Payer Select a Payer Contribution Category Select Cate Contribution Paid Receipt No. Payment Date Payment Type Payment T	egory 🔽	Policy Value 10,500 Contribution Paid 10,600	Policy Status	-100.00		
Save						Cancel

Fig. 118: Image 130 - 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.

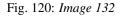
1. If the Contribution paid matches the price of the policy:

IMIS	
	Premium matches the price of the policy
ок	

Fig. 119: Image 131

2. If the contribution paid is lower than the price of the policy:

IMIS	
	Price of the policy not covered yet
ОК	



Followed by:

If you choose **Yes**, the policy will be (enforced) set as **Active**. If you choose No, it will remain **Idle**.

3. If the contribution is higher than the price of the policy:

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 .

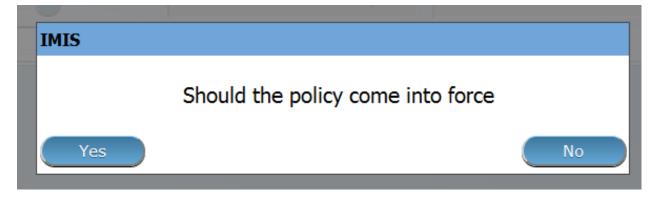


Fig. 121: Image 133

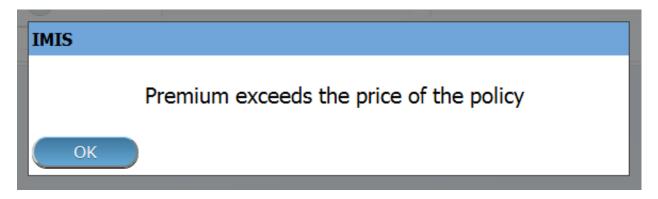


Fig. 122: Image 134

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.

Deleting a Contribution

Click on the Red Cross Sign button to delete the currently selected record.

Before deleting a confirmation popup (*Image 135 - Delete confirmation- Button Panel*) is displayed, which requires the user to confirm if the action should really be carried out?

IMIS		
An	e you sure you want to delete?	
Yes		No
Dummy	0987-12345	6/8/2012

Fig. 123: Image 135 - Delete confirmation- Button Panel

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

7.5 Claims

The functionality under the menu Claims allows 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**. 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. Medical reviewing and feedback acquiring can be by-passed. Ones such (manual) scrutiny of the claim is at the end, the claim may be pushed to the status **Processed**. 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). 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**.

7.5.1 Heath 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.

Home Insurees and Policies	Claims Administration	Tools My	/ profile	Logout	Search Insurance No V	7	v16.3.0
Current User Jiri Nemec (jiri)	Health Facility Claims						
Roles Enrolment Officer	Review						
Manager Accountant Clerk	Batch Run						
Nedical Officer Scheme Administrator	·						

Fig. 124: Image 136 - 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 (*Image 136 - Navigation Health Facility Claims*).

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*

Home	Insurees and Policies	Claims	Administrat	ion Tools	My prof	ile Logout	Search	Insurance 🔻		2
Select Cr	riteria									
Claim Details	RegionSelect Region District	~	HF Name Review Status	Select Status		Visit Date From Claim Date From		То		0
	HF Code Select HF Cod			Select Status			Select Dg			
Claim Ad	Iministrator	~	Claim Status	Checked	~	Batch Run		~		
Insurar	nce Number		Claim No.			Visit Type	Select Type	V		Search
9 Claims	Found							Se	lect To Subr	nit 🗆
CLAIM NO.	HF NAME	DAT	E CLAIMED FE	EDBACK STATUS	REVI	EW STATUS	CLAIMED	APPROVED	CLAIM STAT	us
<u>clm12</u>	Regional hospital	06/0	6/2017 Id		Idle		700.00	200.00	Checked	
<u>clm11</u>	Regional hospital	06/0	6/2017 Idl		Idle		700.00		Checked	
<u>clm9</u>	Regional hospital	29/0	5/2017 Se	lected for Feedback	Selec	ted for Review	1,500.00	1,500.00	Checked	
<u>clm6</u>	Regional hospital			livered		ted for Review	300.00		Checked	
<u>clm5</u>	Regional hospital		1	livered		ted for Review	20,200.00	1,700.00		
<u>clm3</u>	Regional hospital		-1	livered		ted for Review	19,000.00	5,200.00		
<u>clm1</u>	Regional hospital		-1	livered		ted for Review	8,500.00	3,000.00		
<u>cl07</u>	Regional hospital			livered		ted for Review	8,500.00	6,500.00		
<u>c1</u>	Regional hospital	10/0	5/2017 De	livered	Selec	ted for Review	9,300.00	3,000.00	Checked	
Add		Load		Delete		-	Submit			Cancel
Aud		LOAD		Delete			Submit			Cancer

Fig. 125: Image 137 - Claims Control Page

• 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 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 clicking on the arrow on the right of the selector, 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 Button, 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 mouse to highlight the full date and then press the space key.* 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 Button, to search for claims with a Visit Date From 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.* 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 Button, 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 mouse to highlight the full date and then press the space key.*

• Claim Date To

Type in a date; or use the Date Selector Button, 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.*

• Date Selector Button

Clicking on the Date Selector Button will pop-up an easy to use, calendar selector (image138); 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.

	Se	pte	mbe	r , 20 :	12	→
Su	Мо	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
٦	Today	: Sep	otemb	oer 6,	201	2

Image 138 - Calendar Selector - Search 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 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 (*Image 139 - Selected record (blue), hovered records (yellow) - Result Panel*). 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.

CLAIM NO.	HF NAME	DATE CLAIMED	FEEDBACK STATUS	REVIEW STATUS	CLAIMED	APPROVED	CLAIM STATUS	
dm12	Regional hospital	06/06/2017	Idle	Idle	700.00	200.00	Checked	C
dm11	Regional hospital	06/06/2017	Idle	Idle	700.00	700.00	Checked	
dm9	Regional hospital	29/05/2017	Selected for Feedback	Selected for Review	1,500.00	1,500.00	Checked	
dm6	Regional hospital	23/05/2017	Delivered	Selected for Review	300.00	300.00	Checked	C
dm5	Regional hospital	23/05/2017	Delivered	Selected for Review	20,200.00	1,700.00	Checked	C
dm3	Regional hospital	31/05/2016	Delivered	Selected for Review	19,000.00	5,200.00	Checked	
dm1	Regional hospital	22/05/2017	Delivered	Selected for Review	8,500.00	3,000.00	Checked	
<u>d07</u>	Regional hospital	03/01/2017	Delivered	Selected for Review	8,500.00	6,500.00	Checked	
c1	Regional hospital	10/05/2017	Delivered	Selected for Review	9,300.00	3,000.00	Checked	

Fig. 126: Image 139 - Selected record (blue), hovered records (yellow) - Result Panel

A maximum of 2000 records can be displayed at one time, in a scroll panel. Further records can be viewed by processing the current loaded claims and search claims again.

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 *Claim Page*, the button panel (the buttons Load and Submit) 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.

• add

By clicking on the add button, 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.

• load

By clicking on the load button, the user is directed to the *Claim Page*, where the current selected claim can be edited (provided it in the state **Entered**).

The 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.

• submit

By clicking on the submit button, claim status of all claims with claim status **Entered** and which have been selected to be submitted by checking the check box on right end of each record, will be submitted.

On the top of result panel, there is a checkbox to be used to select all claims currently loaded in the result panel and whose claim status is **Entered**, prior to be submitted.

Once the process is done, a popup window (*Image 140 - Submit Claims Prompt – Claims Control Page*) with the result of the process will be shown.

6/15/2012	Idle	Idle		
IMIS				
	Would you lik	e to submit the cla	imc2	
	would you lik		111151	
Yes			No	
6/15/2012	Idle	Idle		

Fig. 127: Image 140 - Submit Claims Prompt - Claims Control Page

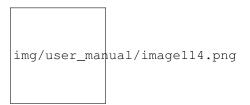


Fig. 128: Image 141 - Submitted Claims details – Claims Control Page

• delete

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

Before deleting a confirmation popup (*Image 142 - Delete confirmation – Claims Control Page*) is displayed, which requires the user to confirm if the action should really be carried out?

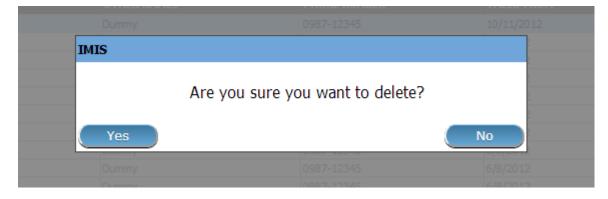


Fig. 129: Image 142 - Delete confirmation - Claims Control Page

• cancel

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

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

Home	Insurees and Po	olicies Clai	ms Administration	Tools	My profile	Logout	Search Insurance No	v16.3.0
Claim Detai	ils							
	HF Code H10001		HF Name Dodoma regio	nal Hospita			Visit Date From 14/12/2016	
Insuranc	e Number 111111111		Name Gideon Saidi 1	hadei			Visit Date To 14/12/2016	
	Main Dg. B52	¥	Claim No. xx1		Date Claimed 15/12	2/2016	Claimed	800.00
	Sec Dg1Select Dg	•	Sec Dg2Select Dg	•	Sec Dg3Se	lect Dg	▼ Sec Dg4Select D	g 🔻
Adn	Claim Ninistrator X100	Gu	Jarantee No		Visit Type Eme	rgency	•	
Services	S	5						
SERVICE C	XODE QL	IANTITY PRICE	EXPLANATION					^
AOFB01	Antenatal Examin	1.00	800.00					×
								X
		l						X _
Items	ļ.		,					
ITEM CODI	E 01	5 IANTITY PRICE	EXPLANATION					
								×
								×
								×
								<u> </u>
								× •
Explanation	n							
Save			Add				Print	Cancel

Fig. 130: Image 143 - Claim Page

• 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.

• Insurance Number

Enter the insurance number of the patient. When done entering this field, the corresponding name of the patient will be filled on the name of the patient (the text box which is read only field and is on the right side of the Insurance Number text field). Mandatory.

• 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 from the drop down list of diagnosis codes. Mandatory.

• Sec Dg 1

Select the code of the first secondary diagnosis from the drop down list of diagnosis codes.

• Sec Dg 2

Select the code of the second secondary diagnosis from the drop down list of diagnosis codes.

• Sec Dg 3

Select the code of the third secondary diagnosis from the drop down list of diagnosis codes.

• Sec Dg 4

Select the code of the fourth secondary diagnosis from the drop down list of diagnosis codes.

• 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, Re-ferral, 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, 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	E CODE	QUANTITY	VALUE
S-52 N	Medical Service 52	3.00	3900.0
S-46 N	Medical Service 46	2.00	500.0
S-193	Medical Service 193	1	6400.0
s-11			
CODE	NAME	PRICE	
S-11	Medical Service 11	8500.0	0
S-110	Medical Service 110	2400.0	0
S-111	Medical Service 111	7300.0	0
S-112	Medical Service 112	7700.0	· ·
S-113	Medical Service 113	9100.0	1400.00
S-114	Medical Service 114	4900.0	2000.00
S-115	Medical Service 115	5000.0	
S-116	Medical Service 116	8300.0	
S-117	Medical Service 117	3900.0	
S-118	Medical Service 118	700.00	
S-119	Medical Service 119	4400.0	0

Fig. 131: Image 144 - Services dropdown suggestion box - Claim Page

2. 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.

3. 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.

4. explanation

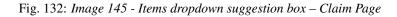
Enter extra information about the service for the scheme administration (a medical officer of the scheme administrator).

- 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, 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.

ITEM C	ODE	QUANTITY	VALUE	EXPLANATION	-
I-87 M	ledical Item 87	3.00	1400.00		X
I-149 I	Medical Item 149	4.00	3900.00		X
I-82 M	ledical Item 82	3.00	4400.00		XE
medica	al item 1				× I
CODE	NAME	PRICE	*		ХL
I-1	Medical Item 1	29.00	=		
I-10	Medical Item 10	7200.00	HF: 001	C1	
I-11	Medical Item 11	7100.00			
I-12	Medical Item 12	6000.00			
I-13	Medical Item 13	7200.00			
I-14	Medical Item 14	9100.00			
I-15	Medical Item 15	9400.00		Add	
I-16	Medical Item 16	6100.00		Add	
I-17	Medical Item 17	9800.00			
T 10	Modical Itom 19	0000.00			



2. 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.

3. 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.

4. 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 (medical officer).

User Controls

On top of services input grid panel and items input grid panel, there is a textbox field (*Image 146 - Services input grid row number change, input field – Claim Page*) and (*Image 147 - Items input grid row number change, input field – Claim Page*) which is filled with a constant representing the current number of rows in the input grid a user is working with. A user can change the current number of rows in the corresponding data input grid by entered a number of rows greater than existing one. This change is only allowed before a user has made changes to the corresponding data input grid.



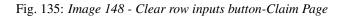
Fig. 133: Image 146 - Services input grid row number change, input field – Claim Page

Items	5
-------	---

Fig. 134: Image 147 - Items input grid row number change, input field - Claim Page

A user can manually clear the inputs in the row by clicking the Red Cross button on the end right of a desired row (*Image 148 - Clear row inputs button-Claim Page*). This action will require a user to confirm for the clearing process to proceed by choosing either yes / no from the popup window (*Image 149 - Clearing of a row confirmation – Claim Page*) asking for user confirmation.

SERVICE CODE	QUANTITY	VALUE	EXPLANATION
S-52 Medical Service 52	3.00	3900.00	
S-46 Medical Service 46	2.00	500.00	



2. Saving

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

4. Printing of a claim

By clicking on the Print button, the user will be shown a printable version of the claim details page. The printable version of the claim is available in the following formats (Word, PDF, Excel)

5. Creating of a new claim

By clicking on the Add button, 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. Cancel

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

7.5.2 Review claims

The functionality allows reviewing and adjustments of claims from medical point of view. Reviewing of claims is restricted to users with the role of Medical Officer

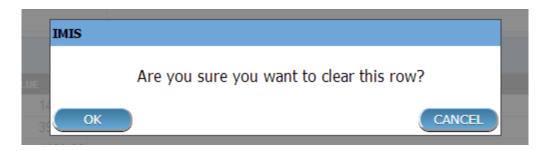


Fig. 136: Image 149 - Clearing of a row confirmation – Claim Page

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 Review.

Home Insurees and Policies	Claims Administration Tools My profile Logout	Search Insurance No 🔽 💽 👔 v16.3.0
Current User	Health Facility Claims	
Jiri Nemec (jiri)		
Roles	Bendens	
Enrolment Officer	Review	
Manager	·····	
Accountant	Batch Run	
Clerk	Daten Kan	
Nedical Officer		
Scheme Administrator		
IMIS Administrator		
Receptionlist		
Claime Administration		

Fig. 137: Image 150 - Navigation Review

Clicking on the sub menu Review re-directs the current user to the 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 (*Image 150 - Navigation Review*).

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 searched for health facility is located or where patients are permanently living 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

Hom	e Insurees and Polic	ies Claims	Administration Too	ols My profile	Logout	Search	h Insurance		?
Selec	t Criteria								
Claim D	etails								
^	RegionSelect R	egion 🗸	HF Name		Visit Date Fi	rom To			\bigcirc
Α	District	~	Review Status Select	Status 🗸	Claim Date Fi	To			
	HF Code Select	HF Code 🗸	Feedback Status Select	Status 🗸	Main	DgSelect	Dg 🗸		
Cla	im Administrator	~	Claim Status Checked	~	Batch	Run	~		
Ir	surance Number		Claim No.		Visit T	ypeSelect	Туре 🗸		Search
Claim	Selection Update								
Citeria									
Sel		ndom 🔲 🗌	% Value			Variance 🗌	%		Update
9 Cla	ims Found						Se	lect To Pro	ocess 🗌
_	IMS FOUND	DATE CLAIMED	FEEDBACK	REVIEW	a	AIMED		elect To Pro	
_		DATE CLAIMED	FEEDBACK Idle	REVIEW	a	AIMED 700.00		CLAIM STAT	TUS ,
CLAIM	NO. HF NAME						APPROVED	CLAIM STAT Checked	
CLAIM clm12	NO. HF NAME Regional hospital	06/06/2017	Idle	✓ Idle	× ×	700.00	APPROVED	CLAIM STAT Checked Checked	rus
CLAIM clm12 clm11 clm9	NO. HF NAME Regional hospital Regional hospital	06/06/2017 06/06/2017	Idle Idle	✓ Idle✓ Idle	✓ ✓ eview ✓	700.00 700.00	APPROVED 200.00 0 700.00	CLAIM STAT Checked Checked Checked	
CLAIM clm12 clm11	NO. HF NAME Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017	Idle Idle Selected for Feedback	 ✓ Idle ✓ Idle ✓ Selected for Re 	v eview v eview v	700.00 700.00 1,500.00	APPROVED 0 200.00 700.00 1,500.00	CLAIM STAT Checked Checked Checked Checked	
CLAIM clm12 clm11 clm9	NO. HF NAME Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017 23/05/2017	Idle Idle Selected for Feedback Delivered	 ✓ Idle ✓ Idle ✓ Selected for Re ✓ Selected for Re 	v eview v eview v eview v	700.00 700.00 1,500.00 300.00	APPROVED 0 200.00 700.00 1,500.00 300.00	CLAIM STAT Checked Checked Checked Checked Checked	
CLAIM clm12 clm11 clm9 clm9 clm5	NO. HF NAME Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017 23/05/2017 23/05/2017	Idle Idle Selected for Feedback Delivered Delivered	 Idle Idle Selected for Re Selected for Re Selected for Re 	v eview eview eview eview eview	700.00 700.00 1,500.00 300.00 20,200.00	APPROVED 200.00 (700.00 (1,500.00 (300.00 (1,700.00 (CLAIN STAT Checked Checked Checked Checked Checked Checked	
CLAIM clm12 clm11 clm9 clm5 clm5 clm3	NO. HF NAME Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017 23/05/2017 23/05/2017 31/05/2016	Idle Idle Selected for Feedback Delivered Delivered Delivered	v Idle v Idle v Selected for Re	v eview eview eview eview eview eview eview	700.00 700.00 1,500.00 300.00 20,200.00 19,000.00	APPROVED 200.00 (700.00 (1,500.00 (300.00 (1,700.00 (5,200.00 (CLAIM STAT Checked Checked Checked Checked Checked Checked Checked	
CLAIM clm12 clm11 clm9 clm5 clm3 clm1	NO. HF NAME Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017 23/05/2017 23/05/2017 31/05/2016 22/05/2017	Idle Idle Selected for Feedback Delivered Delivered Delivered Delivered	v Idle v Idle v Selected for Re	view aview aview aview aview aview	700.00 700.00 1,500.00 300.00 20,200.00 19,000.00 8,500.00	APPROVED 0 200.00 700.00 1,500.00 1,700.00 5,200.00 3,000.00	CLAIM STAT Checked Checked Checked Checked Checked Checked Checked Checked	
CLAIM dm12 dm11 dm9 dm6 dm3 dm3 dm1 d07	NO. HF NAME Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017 23/05/2017 31/05/2016 22/05/2017 03/01/2017	Idle Idle Selected for Feedback Delivered Delivered Delivered Delivered Delivered	v Idle v Idle v Selected for Re v Selected for Re	view aview aview aview aview aview aview	700.00 700.00 1,500.00 300.00 20,200.00 19,000.00 8,500.00 8,500.00	APPROVED 0 200.00 700.00 1,500.00 1,700.00 5,200.00 3,000.00 6,500.00	CLAIM STAT Checked Checked Checked Checked Checked Checked Checked Checked	
CLAIM dm12 dm11 dm9 dm6 dm3 dm3 dm1 d07	NO. HF HAME Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 06/06/2017 29/05/2017 23/05/2017 31/05/2016 22/05/2017 03/01/2017	Idle Idle Selected for Feedback Delivered Delivered Delivered Delivered Delivered Delivered	v Idle v Idle v Selected for Re v Selected for Re		700.00 700.00 1,500.00 300.00 20,200.00 19,000.00 8,500.00 8,500.00	APPROVED 0 200.00 700.00 1,500.00 1,700.00 5,200.00 3,000.00 6,500.00	CLAIM STAT Checked Checked Checked Checked Checked Checked Checked Checked	
CLAIM clm12 clm1 clm9 clm5 clm3 clm1 cl07 c1	NO. HF HAME Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital Regional hospital	06/06/2017 05/06/2017 23/05/2017 23/05/2017 31/05/2017 31/05/2017 03/01/2017 10/05/2017	Idle Idle Selected for Feedback Delivered Delivered Delivered Delivered Delivered Delivered	v Idle v Idle v Selected for Re		700.00 700.00 1,500.00 20,200.00 19,000.00 8,500.00 8,500.00 9,300.00	APPROVED 0 200.00 700.00 1,500.00 1,700.00 5,200.00 3,000.00 6,500.00	CLAIM STAT Checked Checked Checked Checked Checked Checked Checked Checked	

Fig. 138: Image 151 - Claims Overview Page

Select the District; where searched for health facility is located or where patients are permanently living from the list of districts by clicking on the arrow on the right of the selector to select 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; from the list of health facilities codes 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, 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 administrator codes 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.*

• Insurence Number

Type in the beginning of; or the full Insurence Number, to search for claims for patients with the insurance number which start with or match completely the typed text.

• 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 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 status by clicking on the arrow on the right of the selector, 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 Button, 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 mouse to highlight the full date and then press the space key.*

• Visit Date To

Type in a date; or use the Date Selector Button, 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 mouse to highlight the full date and then press the space key.*

• Claim Date From

Type in a date; or use the Date Selector Button, 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 mouse to highlight the full date and then press the space key.*

• Claim Date To

Type in a date; or use the Date Selector Button, 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 mouse to highlight the full date and then press the space key.*

• 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.

• Date Selector Button

Clicking on the Date Selector Button will pop-up an easy to use, calendar selector (iamge152); 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.

4	Se	pte	mbe	r, 20	12	×
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
٦	Today	: Se	ptem	ber 6,	201	2

Image 152 - Calendar Selector - Search 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. 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 (**Not**) **Selected for Feedback** or (**Not**) **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 alone or Select and either Random or Value or Variance or combination of Value and Variance.

• select

Is 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. The default is 40000.

• variance

Accept a number which is considered to be a percentage of the current claim value variance. Calculated by dividing the current claim value (**value**) and the average sum (**Average**) of the all claims in the previous year from the current claim date and with the same main diagnosis as that of the current claim, minus one (1) and finally multiply by hundred (100) to get the percentage variance. I.e **Percentage Variance** = [(**Value / Average**) - 1] * 100 Enter a number by checking the variance checkbox and enter a number on the text field next to checkbox. The default is 50%.

• Update button

Once desired criteria have been set and after clicking this button, then the claims currently displayed in the result panel which satisfy the criteria, will be updated of their Idle Review Status or Feedback Status to either (Not) Selected for Review or (Not) Selected for Feedback respectively.

A popup prompt window will be displayed to confirm the process, as shown on (image153) and (*Image 154 - Claim Review Selection Update Prompt – Claims Overview Page*).

Once the update process is over, a popup window (*Image 155 - Claim Selection Up- date Results – Claims Overview Page*). Showing the result of the process will be displayed.

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 (*Image 156 - Selected record (blue)*, *hovered records (yellow) - Result Panel*).

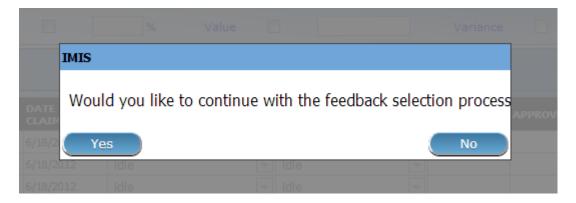


Fig. 139: Image 153 - Claim Feedback Selection Update Prompt – Claims Overview Page

		%	Value				Variance	
	IMIS							
	Would	you like	to continu	ie with	the revie	ew selection	n process	APPROVED
	Yes						No	

Fig. 140: Image 154 - Claim Review Selection Update Prompt - Claims Overview Page



Fig. 141: Image 155 - Claim Selection Update Results – Claims Overview Page

CLAIM CODE	HEALTH FACILITY	DATE CLAIMED	FEEDBACK	REVIEW	CLAIMED	APPROVED	CLAIM STATUS	
0000006	Health Centre 1 in District 1	6/18/2012	Not Selected	Not Selected 🔹]		Checked	
0000005	Health Centre 1 in District 1	6/18/2012	Not Selected	Not Selected 🔹]		Checked	
00000004	Health Centre 1 in District 1	6/18/2012	Selected for Feedback	Not Selected			Checked	
0000003	Health Centre 1 in District 1	6/18/2012	ldle 🔹	🛛 Idle 🔍 💌			Checked	
0000002	Health Centre 1 in District 1	6/18/2012	Not Selected	Selected for Review 💌]		Checked	
0000001	Health Centre 1 in District 1	6/18/2012	Idle	Idle 💌			Checked	

Fig. 142: Image 156 - Selected record (blue), hovered records (yellow) - Result Panel

A maximum of 2000 records can be displayed at one time, in a scroll panel. Further records can be viewed by processing the current loaded claims and search claims again.

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 from low status to high status only. Either from Idle to Not Selected or Selected for Feedback in case of the feedback status or Not Selected or Selected for Review in case of the review status. Or from Not Selected to Selected for Feedback in case of the feedback status or Selected for Review in case of the review status. For changes to take effect, a user will have to update the changes by clicking the Update button.

4. Button Panel

With exception of the Cancel button, which re-directs to the *Claims Overview Page*, the button panel 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.

• review

Clicking on this button 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.

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

• feedback

Clicking on this button 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**.

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

• update

Clicking on this button, update the feedback status and review status of claims in the result panel from either Idle to Not Selected or Selected for Feedback or Selected for Review respectively or from Not Selected to Selected for Feedback or Selected for Review respectively.

• process

Clicking on this button changes the claim status **Checked** of all current selected claims in the Result Panel, selected by checking the checkbox on the right end of each record, to claim status **Processed**.

Claims which can be selected for being processed are ones whose claim status is **Checked** and **Feedback Status** and **Review Status** are not **Idle**. The checkbox on the top of the Result Panel can be used to select multiple claims. The process happens while a user stays on the same page. Once the process is done, a popup window (*Image 157 - Process Claim Prompt – Claims Overview Page*) showing results of the process will be shown.

• Cancel

By clicking on the cancel button, the user will be re-directed to the *Claims Overview Page*.

5. Information Panel

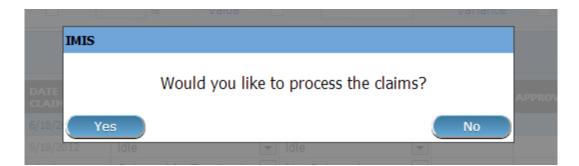


Fig. 143: Image 157 - Process Claim Prompt – Claims Overview Page

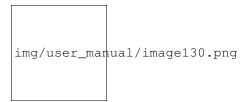


Fig. 144: Image 158 - Processed Claims details - Claims Overview Page

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

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 role Medical Officer can enter new relevant values for review of the current claim.

Read-only information of the current claim includes the following:

• HF

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

• Main Dg.

The code of the main diagnosis.

• Sec Dgl

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

Home Insuree	es and Po	olicies	Claims	Administrati	on Tools	My profile	Logout	Search Insurance No V	?
	HFX HF Regi X	01 - ional hospi	tal Ir	surance Number 5	555444112	Partient Name Luisa Gonzalez		Claimed	14000.
Mai	n Dg, B82			Claim No.>	x3	Date Claimed 04/07/2017		Approved	8400.
Sec	: Dg1			Sec Dg2		Sec Dg3		Sec Dg4	
Date Proce	essed			Visit Date From 03/07/2017		Visit Da	te To 03/07/2017	Adjusted	0
Claim Administ	Claim Administrator CLX01			Visit Type I	Emergency	Guarante	e No		
ervices									
SERVICE CODE	QTY PR	ICE EX	PLANATION		APP. QTY	APP. PRICE JUS	TIFICATION	STATUS	VALUATED R
(100 Burst Abdomen	1 2	2000.00						Passed V	0
(101 Cholecystectomy	1 4	1000.00			0.00			Rejected V	10
(103 Delivery-Normal	1	600.00			0.00			Rejected V	10
(105 Mastectomy	1 4	1000.00						Passed V	0
X106 Urinary lab test	1	400.00						Passed V	0
tems									
	QTY PR	ICE EX	PLANATION		APP. QTY	APP. JUS PRICE JUS	TIFICATION	STATUS	VALUATED R
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TTEM CODE Y200 ACETYLSALICYLIC ACID (ASPIRIN) TABS	1		CPLANATION		APP. QTY	APP. PRICE JUS	TIFICATION		
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Fig. 145: Image 159 - Claim Review Page

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.

• rejection reason

The last column of each of the two grids, headed with character ' \mathbf{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:

Reason	Reason Description
Code	
-1	Rejected by a medical officer
0	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	Item/Service duplicated
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

- 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.

• Adjustment

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

2. Saving

Once appropriate data is entered, clicking on the Save button will save the claim. The user will be re-directed back to the *Claims Overview Page*; a message confirming that the claim has been saved will

appear on the Information Panel. The Save button appears only if the claim was reviewed in the status Selected for Review.

3. reviewing

Once appropriate data is entered, clicking on the Reviewed button will save the claim and change the claim Review Status from **Selected for Review** to **Review**. The user will be re-directed back to the *Claims Overview Page*; a message confirming that the claim has been saved will appear on the Information Panel. The Reviewed button appears only if the claim was reviewed in the status **Selected for Review**.

4. data entry validation

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

5. Cancel

By clicking on the Cancel button, the user will be re-directed to the Claims Overview Page.

Claim Feedback Page

1. Data Entry

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	2	v16.3.0
Claim									
	ils Claim No. to66 HF Code H10001 aim Date 14/11/2016	Insurance 111 Number HF Name Ho Visit Date To 14/	doma regional V spital	st Name Thadei isit Date From Review Review Status	2016 C	ther Names Gid Ilaim Status Rej Feedback Sel	ected		
	Claim X100	VISIC Date 10 14	11/2010	Status		Status Fee	dback		
Feedbac	ck								
	Enrolment Officer Select Er Care Rendered Select Ye Payment Asked Select Ye Drugs Prescribed Select Ye Drugs Received Select Ye Overall Asessment 0 0 1 C Feedback Date	es/No	-	¥					
Save								Са	ncel

Fig. 146: Image 160 - Claim Feedback Page

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 role Medical

Officer can enter feedback on the current claim or where the user can read a feedback delivered by enrolment officers.

Read-only data of the feedback includes in the section Claim the following:

• HF Code

The health facility code which the claim belongs to.

• HF Name

The health facility name which the claim belongs to

• 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.

• Last Name

The last name of the patient on whom the claim is made.

• Other Names

The other names 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.

• Review Status

The status of the claim with respect to reviewing.

• Feedback Status

The status of the claim with respect to feed backing.

Modifiable data of the feedback include sin the section Feedback the following

• 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 list, by clicking the arrow on the right side of selection field.

• Payment Asked

Select 'Yes' or 'No' from the list, by clicking the arrow on the right side of selection field.

• Drugs Prescribed

Select 'Yes' or 'No' from the list, by clicking the arrow on the right side of selection field.

• Drugs Received

Select 'Yes' or 'No' from the list, by clicking the arrow on the right side of selection field

• Overall Assessment

Choose one level among the six levels available by checking/clicking on the desired checkbox.

• Feedback Date

Type in a date of collection of the feedback; or use the date selector button, to enter date. *Note. To clear the date entry box; use the mouse to highlight the full date and then press the back space key.*

• Date Selector Button

Clicking on the Date Selector Button will pop-up an easy to use, calendar selector (image161); 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.

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30	1	2	3	4	5	6
т	Today	· Ser	ntemb	er 6	2013	,
	ouay	. set	/ cent	, ci 0,	2014	-

Image 161 - Calendar Selector - Search Panel

2. Saving

Once all mandatory data is entered, clicking on the Save button 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.

3. Cancel

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

7.5.3 Batch Run

Administration of batches of claims is restricted to users with the role of Accountant.

Pre-conditions

Navigation

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

Home Insurees and Policies	Claims Administration	Tools My profile	Logout	Search Insurance No 🔻 돈	2	v16.3.0
Current User Jri Nemec (Jri)	Health Facility Claims					
Roles Enrolment Officer Nanager	Review					
Accountant Clerk	Batch Run					
Medical Officer Scheme Administrator IMIS Administrator						
Receptionlist Claim Administrator						
Claim Contributor District Dummy						

Fig. 147: Image 162 - 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

Image163 (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 role of Accountant. By having access to this page, it is possible to process batches, filter, and filter for accounts. The panel is divided into six sections (image163)

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.*

• 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*

Home	Insurees and Pe	olicies	Claims Adm	inistration Tools	My profile L	ogout	Search Insurance 🔽 🕻	2 7
Batch P	rocessing							
Aegion	Select Region	~	District	V	MonthMo	onth 🔽	YearYear 🗸	Process
Filter								
В	ype Monthly gionSelect Region-	~	YearYear District	V	PeriodPeriod ProductSelect Prod	duct V	CategorySelect category	Filter
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Ε								Cancel
F								

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.

• Month

Select the month; from the list of months 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. Only periods for which a batch hasn't been run yet are offered in both lists.

• process

Once criteria are chosen, clicking on this process button, will process based on the selected criteria. If the option **National** was used in the field Region the batch is run only for nationwide insurance products. If a region is selected in the field Region and no district is selected the batch is 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.

2. Filter Panel.

The filter panel allows a user to filter results of running of batches (calculation of indexes for relative pricing) 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 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.*

• 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 only one then the district will be automatically selected*

• Product

Select Product from the list of products by clicking on the arrow on the right of the selector.

• Category

Select category of health care (**Hospital**, **Non-hospital**, **General**) 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 will filter based on the selection criteria.

3. Display Panel.

The Display Panel is used to display results of running of batches after the filter or processing. While hovering over records, records get highlighted with a yellow colour (*Image 164 - Selected record (blue)*, *hovered records (yellow) - Result Panel*).

YEAR	MONTH	PRODUCT	CARE TYPE	CALCULATED DATE	INDEX
2012	1	Product 1 in District 1	0	2/28/2012	0.7500000000000000000
2012	2	Product 1 in District 1	0	3/31/2012	0.8000000000000000000000000000000000000
2012	3	Product 1 in District 1	0	4/30/2012	0.830000000000000000
2012	1	Product 1 in District 1	I	2/28/2012	0.770000000000000000
2012	2	Product 1 in District 1	I	3/31/2012	0.630000000000000000
2012	3	Product 1 in District 1	I	4/30/2012	0.720000000000000000

Fig 148. Image	164 - Selected record	(blue) hovered r	records (vellow) - Result Panel
115. 170. Image	107 Denetica record	(Dinc), novercu i	ccorus (ycnow	<i>j</i> nesui ranci

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:

• Start Date

Type in a date; or use the Date Selector Button to enter date which is equal or less than claim date. *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 date which is equal or greater than claim 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 (*Image 16 - Health Facilities Control Page*); 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.

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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
Today: September 6, 2012						

Image 165 - 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 a region. *Note: The list will only be filled with the regions assigned to the current logged in user and the option National.*

• 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 only one then the District will be automatically selected*

• HF

Select a health facility from the list of health facilities codes and names clicking on the arrow on the right of the selector. *Note: The list will only be filled with the Health Facilities belonging to the Districts assigned to the current logged in user.*

• Product

Select a product from the list of products by clicking on the arrow on the right of the selector. The list of products contains only nationwide insurance products if the option **National** is used in the field Region. It contains only regional insurance products for the selected region if no district is selected. It contains only district insurance products for the selected district.

• Level

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

• Group By

Select either grouping of the report by health facility (HF) or by product (Product) by checking either the health facility checkbox or product checkbox respectively.

• Show All

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

• Show Claims

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

• Preview

Once criteria are chosen, clicking on this preview button will create a protocol of the selected batch.

5. Button Panel

This panel contains control button.

• Cancel

By clicking on the cancel button, 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.

7.6 Tools

7.6.1 Upload / Download selected registers

Access to uploading/downloading of selected registers is restricted to the users with the role of openIMIS Administrator.

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.

Home Insurees and Policies Claims Administratio	Tools My profile Logout Search Insurance
Good Morning Jiri Nemec	Registers v18.1.2 ß
Roles	Policy Renewals
Enrolment Officer Manager Accountant	Feedback Prompts
Accountant Clerk Medical Officer	Extracts
Scheme Administrator IMIS Administrator	Reports
Receptionist Claim Administrator	Utilities
Claim Contributor Region Capital	Funding

Fig. 149: Image 166 - Navigation to Registers

Clicking on the sub menu Registers re-directs the current user to the *Registers Page*: (*Image 166 - Navigation to Registers*)

Registers page

The Registers Page is divided into eight sections: (Image 167 - Upload Registers)

- 1. 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.

• 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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance 🔻 돈	
Upload	Diagnoses							
A	Browse.	Strategy	Select Strategy		Dry Run Uploa	ad		
Upload	Locations							
B	Browse.	. Strategy	Select Strategy		Dry Run Uploa	ad		
Upload	Health Facilities							
C	Browse	Strateg	ySelect Strategy		Dry Run Uplo	ad		
Downlo	oad Diagnoses							
Pwnlo	ad							
	oad Locations							
Pownlo								
Downlo	ad Health Facilities							
G								Cancel
н								

Fig. 150: Image 167 - Upload Registers

• 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

Mandatory.

• 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 Diagnoses*). If user agrees the selected file containing diagnoses will be uploaded.

IMIS	
Are you sure you want to upload a new li	ist of diagnoses?
Yes	No

Fig. 151: Upload Diagnoses

A statistics on the number of inserted/updated diagnoses appears: (Statistics on uploaded diagnoses).

Home	Insurees and Policies	Claims	Administration	Tools My profile	Logout	Search Insurance No 🔻 🖻	7 v10	6.3.0
Current User Jiri Nemec (jiri) Roles Enrolment Officer Manager Accountant Clerk Nedical Officer				Upload Diagnoses				
				Policy Renewals				
				Feedback Prompts				
				Extracts				
Scheme Admin IMIS Administ	trator			Reports				
Receptionlist Claim Adminis Claim Contribu	trator			Utilities				
District Dummy	10			Funding				

Fig. 152: Statistics on uploaded diagnoses

If there are errors an error protocol appears: (Error protocol on uploaded diagnoses)

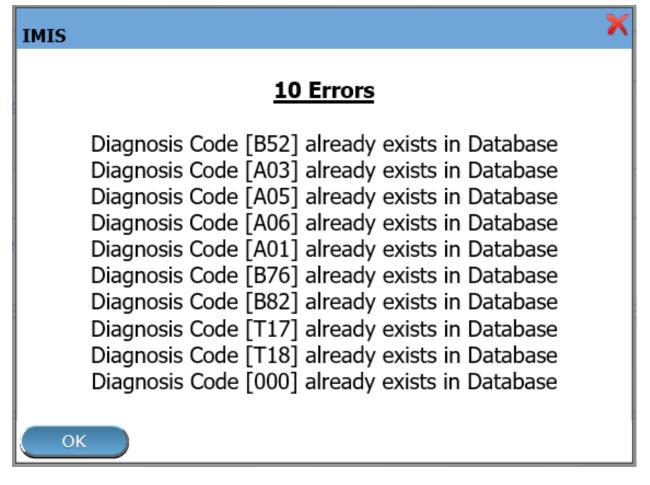


Fig. 153: Error protocol on uploaded diagnoses

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)>]>

2. 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

• 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

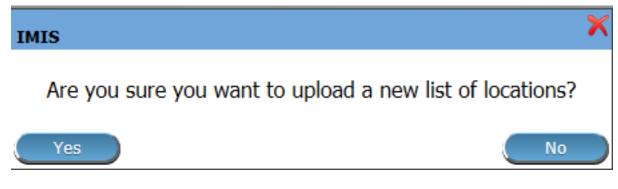
Mandatory.

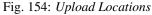
• Dry Run

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.





A statistics on the number of inserted/updated locations appears (Upload Locations statistics)

If there are errors an error protocol appears (Upload Locations error)

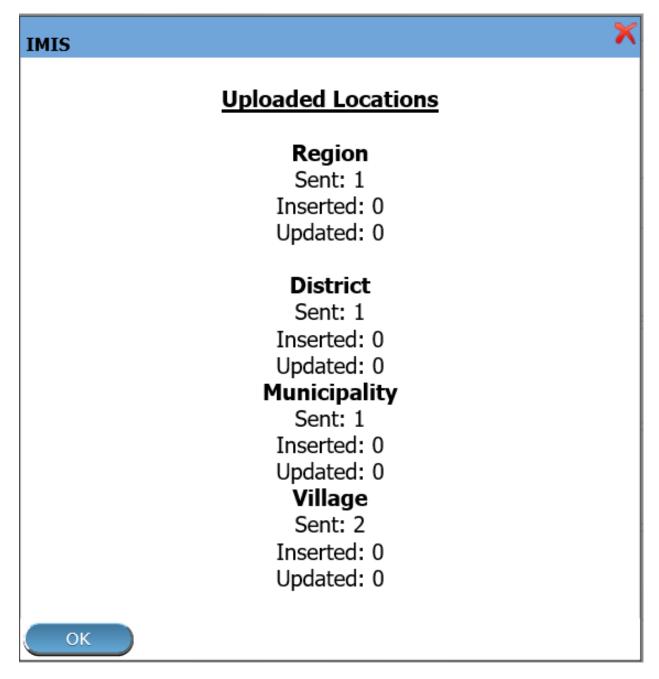


Fig. 155: Upload Locations statistics

IMIS

<u>5 Errors</u>

Region Code[Z0001] is already exists in database District Code[DZ001] is already exists in database Municipality Code[WZ001] is already exists in database Village Code[VZ0057] is already exists in database Village Code[VZ0061] is already exists in database

OK

Fig. 156: 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, MunicipalityName)> < !ELEMENT DistrictCode (#CDATA)> < !ELEMENT MunicipalityCode (#CDATA)> < !ELEMENT MunicipalityName (#CDATA)> <!ELEMENT Villages (Village*)> <!ELEMENT Village (MunicipalityCode,VillageCode, VillageName,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)> 1>

3. 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

Mandatory.

• 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.

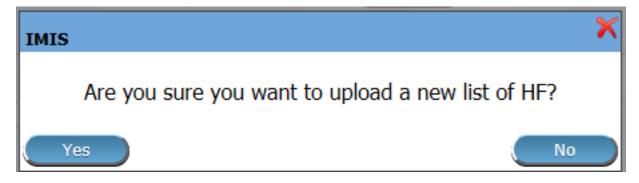


Fig. 157: Upload Health Facilities

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 (IINIR)> <!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 (IINIB)> <!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)> 1>

- 4. 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*)

What do you want to do with Diagnosis201810011155.xml (1.2				
KB)?	Open	Save	Cancel	×
From: imis-mv.swisstph-mis.ch				

Fig. 158: Download Diagnoses

- 5. 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*)

- 6. Download of the register of health facilities
 - Download

What do you want to do with Locations201810011203.xml (52.2				
KB)?	Open	Save	Cancel	\times
From: imis-mv.swisstph-mis.ch				

Fig. 159: Download locations

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 health facilities should be opened or saved or canceled (*Download facilities*)

What do you want to do with Locations201810011203.xml (52.2				
KB)?	Open	Save	Cancel	×
From: imis-mv.swisstph-mis.ch				

Fig. 160: Download facilities

- 7. Buttons
- Cancel

By clicking on Cancel button, user will be re-directed to the Home page.

8. Information Panel

The Information Panel is used to display messages back to the user.

7.6.2 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

Home Insurees and Policies Claims Administration	Tools My profile Lo	gout Search Insurance No 🔻 💽 👔 v16.3.0
Current User	Upload Diagnoses	
Jiri Nemec (jiri) Roles Enrolment Officer	Policy Renewals	
Nanager Accountant	Feedback Prompts	
Clerk Nedral Officer	Extracts	
Scheme Administrator DMIS Administrator	Reports	
Receptionist Claim Administrator	Utilities	
Claim Contributor District		
Dummy	Funding	

Fig. 161: Image 169 - Navigation Policy Renewals

Clicking on the sub menu Policy Renewals re=directs the current user to the Policy Renewal Page.

Home	Insurees and	d Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance	7
Select Cr	iteria								
		Preview	lournal						
	Policy Status	الطالع							
A			✓						
		Select Reg							
	District		~						
	Municipality		~						
	Village		~						
	Enrolment Officer		~						
	Date From								
	Date To						Send SM	15	
Bupd	late				Previ	ew			Cancel
C									
Bupd	late				Previ	ew			Cancel

Fig. 162: Image 170 - 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 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 (*Image 170 - Policy Renewal Page*).

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 (*Image 172 - Preview Report on Renewals*) by clicking on the preview button.

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.

7.6.3 Feedback Prompts

Access to administration of feedback prompts is restricted to the users with the role of Medical Officer.

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	v16.3.0			
			Go	back to	selector.						
14 4 1	of	1 🕨 🕅	4		Find Next 🗜	५- 📀 👘					
			Poli	cy Stat	us Overviev	v					
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	SXB0	001	Basic fixed enrolmer	nt nationwide	01/11/2016	29,000			
							Ward (Nzasa)	29,00			
							VDC/Municipality (Chihanga)	29,00			
Chahwa											
Chahwa mta											
Insurance Number	Last Name	Other Names	Code	•	Name		Renewal Date	Product Value			
77777775	Myer	John	DFC	002	Ceilings free enrolm	ent Dodoma	15/12/2016				
							Ward (Chahwa mtaa)	19,00			
							VDC/Municipality (Chahwa)	19,00			
							Enrolment Assistant ()	-			
							District (Dodoma)	-			
							Total Value:	48,00			
Policy Status	Overview - Printed on: 12/18/2010	6 11:03:14 AM						1 (
								۱.			

Fig. 163: Image 172 - Preview Report on Renewals

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No 🔻 돈	7
			Go	back to	selector.			
14 4 1	1 of :	1 🕨 🕅 🛛	¢		Find Next	🛃 - 🛞 👘		
			Poli	cy Stat	us Overvie	W		
Date From Status: Ac	n 01/01/2017 To 31/07/2017, ctive	Region: TestR	Region, District: Tes	stDistrict1	, Municipality:	TestMunicipa	ality11, Enrolment Officers: E001	- Fox James, Poli
TestDistrict1	I							
	Officers : E001 - Fox James							
TestMunicip								
TestVillage1								
Insurance Number	Last Name	Other Names	Code		Name		Renewal Date	Product Value
111111191	Garbeight	James	RF01		Regional free		31/07/2017	
<u> </u>							Village (TestVillage111) Municipality (TestMunicipality11)	
<u> </u>							Enrolment Officers (E001)	
							(TestDistrict1)	
							Total Value:	10,00
Policy Status	Overview - Printed on: 7/30/2017 7	:42:10 PM						1.
4								•

Fig. 164: Image 173 - Preview Journal on Renewals

Navigation

All functionality for use with the administration of feedback prompt can be found under the main menu Tools, sub menu Feedback Prompts

Home Ins	urees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insura	nce 🔽 🖸	2	
Good Morning	Jiri Nemec			Register	s					v18.1.2 β
Roles				Policy R	enewals					
Enrolment Officer Manager				Feedbac	k Prompts					
Accountant Clerk Medical Officer				Extracts						
Scheme Administrator IMIS Administrator				Reports						
Receptionist Claim Administrator				Utilities						
Claim Contributor Region Capital				Funding						

Fig. 165: Image 174 - Navigation Feedback Prompts

Clicking on the sub menu Feedback Prompts re-directs the current user to the *Feedback Prompt Page* (:ref:'image174).

The Feedback Prompt Page is divided into three panels (Image 175 - Feedback Prompts Page).

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

• 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

Home	Insurees and	d Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance	7
Select Crit	eria								
Α		Select Sta							
		TestRegion	~						
		Select a D							
	Municipality		~						
	Village		~						
	Enrolment Officer		~						
	Date From						_		
	Date To						Send SN	15	
Brevi	ew								Cancel
С									

Fig. 166: Image 175 - Feedback Prompts Page

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 (*Image 176 - Feedback Prompt Journal*).

• 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.

7.6.4 IMIS Extracts

Access to the openIMIS Extracts page is restricted to users with the role of Scheme Administrator (IMIS Central online) or HF Administrator (offline installations). This page will contain all functionality for data synchronization between openIMIS Central and openIMIS 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.

Home	Insurees	and Policies	Claims Administratio	n Tools	My profile	Logout	Search Insu	rance No 🔻 ⋗	?			
			(Go back to s	elector.							
4 4 1		of 1 👂				ه - 🚯						
			F	eedback Pr	ompt Jou	rnal						
Date From 01/01/2017 To 31/07/2017, Region: TestRegion												
District:		TestDistrict4										
Enrolment Office	ber:	Black James		Phone Numb	er:							
Municipality:		TestMunicipality41										
Village:		TestVillage411										
Date	Claim ID	Claim No.	HF Name	insurance Number	Last Name		ther Names	From	То	SMS		
30/07/2017 31/07/2017	69 70	xx2 xx3	HFX01-Regional hospital X HFX01-Regional hospital X	555444111 555444112	Gonzalez Gonzalez		uido uisa	03/07/2017 03/07/2017	03/07/2017 03/07/2017	idle idle		
			• • •									
Feedback Pro	mpt Journal - Pri	inted on: 7/31/2017 12:4	43:25 PM									
										_		
4										•		

Fig. 167: Image 176 - Feedback Prompt Journal

Navigation

All functionality related to openIMIS extracts can be found under the main menu ${\tt Tools},$ sub menu ${\tt IMIS}$ ${\tt Extracts}$

Home Insurees and Policies Claims Admi	nistration Tools My	profile Logout	Search Insurance No 🔻 돈	V16.3.0
Current User	Upload Diagn	oses		
Jiri Nemec (Jiri) Roles Entolment Officer	Policy Renewa	als		
Anager Accountant	Feedback Pro	mpts		
Clerk Nedral Officer	Extracts			
Scheme Administrator IMIS Administrator	Reports			
Receptionist Claim Administrator	Utilities			
Claim Contributor District Dummy	Funding			

Fig. 168: Image 177 - 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)

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

Home	Insurees and Policies	Claims A	dministration	Tools	My profile	Logout	Search Inst	irance 🔽 🕑	17
Downle	oad Master Data								^
A @	ownload Master Data								
Enrolm	ent Officers Code		Download	Feedback	Download	Renewals)		
-	Phone Extract								
B Regio	nSelect Region V	District	~		With Ins	uree	In background	Create	
Create	Offline Extract					_			
C	powerson and the second second	strict	~				In background	0	Create
Kegion	Select Region V	Constant and the second	л	WNLOAD PHOT	1000	With Insuree		DOWNLOAD [F]	Create
Upload	l Claims								
D	Browse						Uple	oad	
	Enrolments						_		
-	Browse						Upl	oad	
Upload	Feedback								
R	Browse						Upl	oad	
G									Cancel
									Conte
H									

Fig. 169: Image 178 - openIMIS Extracts

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:

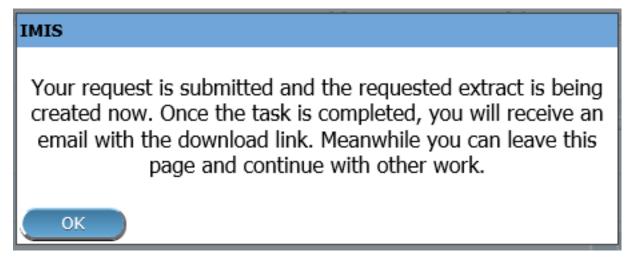
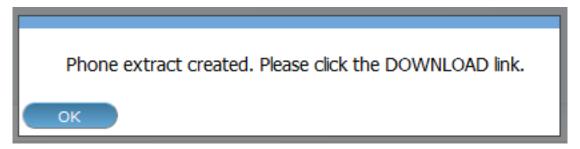
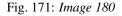


Fig. 170: Image 179

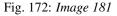
If the extract is not created in background the user is notified about successful creation by the following message as shown below.





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.

Region TestRegionY	District TestDistrictY1	► DOWNLOAD	With Insuree	In background Create



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.

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

					_
Do you want to open or save ImisData.db3 (3.00 KB) from imis-mv.swisstph-mis.ch?	Open	Save	•	Cancel	×

Fig. 173: Image 182

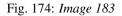
The offline extract section is used to generate the openIMIS 'offline' extract files for the health facilities or offices of the scheme administration that run openIMIS offline. To generate an offline extract file, the operator has to select a region and a district from the list of available districts. 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 insure and policy data are only generated in case the With Insuree checkbox is checked as shown below.

Region TestRegionY	V Distri	rict Select a District 🗸	000006 - 13-10-2017 🗸	Vith Insuree	In background	Full extract Create	
		DOWNLOAD PHOTOS [D]	DOWNLOAD PHOTOS [F]	DOWNLOAD [D]	DOWNLOAD [E]	DOWNLOAD [F]	



• 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.

Region TestRegionY V Dist	rict Select a District 🔽 000006 - 13-10-2017	With Insuree	In background	Full extract Create
	DOWNLOAD PHOTOS [D] DOWNLOAD PHOTOS [F]	DOWNLOAD [D]	DOWNLOAD [E]	DOWNLOAD [F]

Fig. 175: 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.

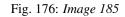
• Empty Extract (Download E)

Empty extracts will only contain the data from registers and no data on insurees 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.

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)

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:

IMIS

Offline extract created. Please click the DOWNLOAD link.

Region: 0 District: 0 Municipality: 0 Village: 0 Items: 0 Services: 0 Price Lists Items: 0 Price Lists Services: 0 Price Lists Items Details : 0 Price Lists Services Details : 0 Main Dg.: 0 Health Facilities: 0 Payer: 0 Enrolment Officers: 0 Products: 0 ProductItems: 0 ProductServices: 0 ProductDistribution: 0 Claim Administrator: 0 Families/Groups: 2 Insurees: 5 Photos: 3 Policies: 7 Contributions: 5 Zipped Pictures: 0

ок

Fig. 177: Image 186

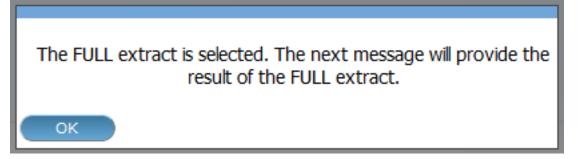


Fig. 178: Image 187

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 feedbacks 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

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

A - Import Extract

Used to extract photos obtained from online IMIS

IMIS

Offline extract created. Please click the DOWNLOAD link.

Region: 21 District: 43 Municipality: 56 Village: 115 Items: 9 Services: 16 Price Lists Items: 9 Price Lists Services: 13 Price Lists Items Details : 32 Price Lists Services Details : 73 Main Dg.: 10 Health Facilities: 12 Payer: 5 Enrolment Officers: 15 Products: 12 ProductItems: 18 ProductServices: 37 ProductDistribution: 204 Claim Administrator: 13 Families/Groups: 165 Insurees: 287 Photos: 182 Policies: 430 Contributions: 254 Zipped Pictures: 21

ок

Fig. 179: Image 188

Do you want to open or save OE_E_228_0.RAR (345 KB) from imis-mv.swisstph-mis.ch ?	Open	Save Cancel ×
Fig. 180: Image 189		
No download file selected OR download file h deleted from the server.	as alrea	dy been
Fig. 181: Image 190		
Region TestRegionY District Select a District 000008 - 13-10-2017 With Insuree DOWNLOAD PHOTOS [D] DOWNLOAD PHOTOS [F] DOWNLOAD [D]	In background	Full extract Create
Fig. 182: Image 191		

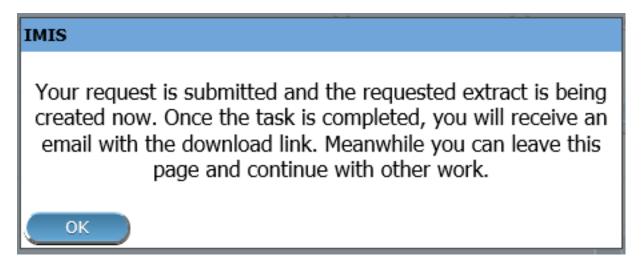


Fig. 183: Image 192

Home	Insurees and Policies	Claims	Administration	Tools	Logout	Search NSHIP No	V	17
Import Ex	tract							
Choose Fil	e No file chosen							Upload
Import Ph	otos							
Choose Fil	e No file chosen							Upload
Download	Claim XMLs							
								Download
								Cancel
Last extr	act sequence : 9					0	FF-LINE HF 045	06:Hombolo Makulu

Fig. 184: Image 193

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

	Home	Insurees and Policies	Claims	Administration	Tools	Logout	Search NSHIP No	V	7
	Import Ex	stract							
A	Choose Fi	le No file chosen							Upload
	Import Pl	iotos							
в	Choose Fi	le No file chosen							Upload
		Enrolment XMLs							
c	٢								(Download)
Ī									
C									Cancel
E	No previ	ous extracts found!							OFF-LINE CHF: 10

Fig. 185: Image 194

A - Import Extract

Used to upload extract obtained from online IMIS

B - Import Photos

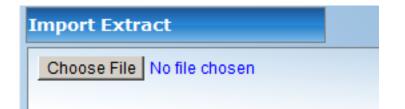
Used to upload photos obtained from online IMIS

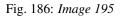
C - Import Extract

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):

On clicking the Choose File button, the file selector dialog appears as shown below:

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.

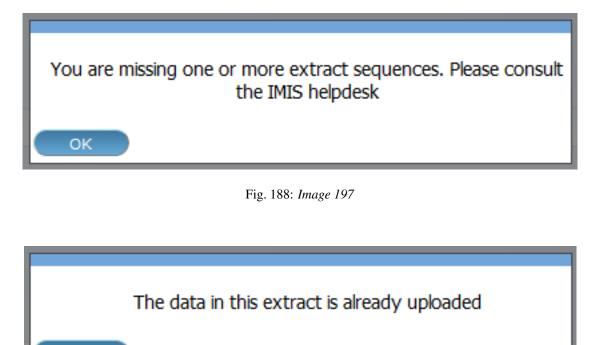


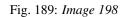


🕥 🗸 🖌 🗸 Computer 👻 Windows (C:) 👻 El	XTRACTS			 Search EXTR. 	ACTS	2	Logout	Search CHF Number
nize 🔻 New folder						(?)		
Hans2	_	Name *	Date modified	Туре	Size			
android		e_D_1_1.RAR	31/08/2012 16:02	WinRAR archive	17,580 KB			
🕌 android-sdks		E_D_1_1_Photos.RAR	31/08/2012 16:02	WinRAR archive	22 KB			
Contacts		DE_D_1_2.RAR	31/08/2012 16:02	WinRAR archive	42 KB			
eshtacts Desktop	_	OE_D_1_5.RAR	06/09/2012 10:58	WinRAR archive	42 KB			
Downloads		CE_D_1_S.KAR	06/09/2012 11:11	WinRAR archive	46 KB			
Favorites		OE_D_1_7.RAR	06/09/2012 11:14	WinRAR archive	44 KB			
📝 Links		CE_D_1_7.RAR	06/09/2012 11:14	WinRAR archive	16 KB			
My Documents		CE_F_1_2.RAR		WinRAR archive				
My Music			31/08/2012 16:02		17,580 KB			
My Pictures		CE_F_1_2_Photos.RAR	31/08/2012 16:02	WinRAR archive	22 KB			
My Videos		E_F_1_4.RAR	06/09/2012 10:57	WinRAR archive	16,970 KB			
Bearches								
Tracing								
workspace								
Computer								Upl
Network								
	-							
File name:				 All Files (*.*) 		-		
				Open	- Cancel	1		
				open				
							1	

Fig. 187: Image 196

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 (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

or

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)

ОK

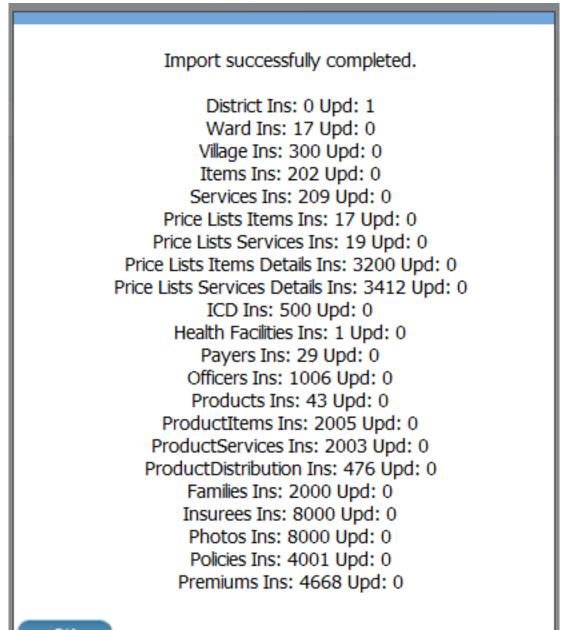
OR (for FULL extract)

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.



OK

Fig. 190: Image 199

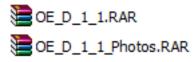


Fig. 191: Image 200

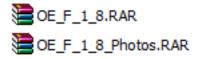


Fig. 192: Image 201

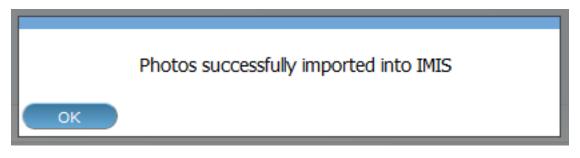


Fig. 193: Image 202

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.

7.6.5 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 role (Manager, Accountant, Scheme Administrator and openIMIS Administrator) only.

Pre-Conditions

Navigation

All functionality for use with the administration of Reports can be found under the main menu Tools, sub menu Reports.

Home Insurees and Policies Claims Administr	ation 🛛 Tools My profile Logout Search Insurance No 🔻 💽 📅 v16.3.0
Current User	Upload Diagnoses
Jiri Nemec (jiri) Roles Enrolment Officer	Policy Renewals
Manager Accountant	Feedback Prompts
Clerk Nedcal Officer	Extracts
Scheme Administrator IMIS Administrator	Reports
Receptionist Claim Administrator	Utilities
Claim Contributor District Dummy	Funding
Kongwa	

Fig. 194: Image 203 - Navigation Reports

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance	7
Reports								
Anth Month-	Quarter Year - VPeriod V 2017	Regi	on elect Region 🔽	District	~	Product Select Pr	oduct 🗸	
Primary C	Operational Indicators-policies Operational Indicators-claims		<u>^</u>					
Prived C	Operational Indicators ion Collection							
	ion Distribution							
Enrolmen	vity Report It Performance Indicators							
nsurees \	Registers without Photos Category Overview							
Matching Claim Ove	Funds							
	ge of Referrals and Insurees Overview		~					
Preview								Cancel

Clicking on the sub menu Reports re-directs the current user to the Reports Page (Image 204 - Reports Page).

Fig. 195: Image 204 - Reports Page

The Reports Page is divided into four panels (Image 204 - Reports Page).

1. Select Criteria

D

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 (*Image 205 - Primary Operational Indicators - Policies Report Criteria – Image 222 Capitation Payment Report Criteria*) will change depending on the selected type of the report.

• Primary Operational Indicators - Policies Report.

Reports		
Month Quarter Year Regi Month ✓ Period 2017 ✓ Si	gion District Select Region V	Product Select Product

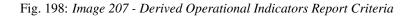
Fig. 196: Image 205 - Primary Operational Indicators - Policies Report Criteria

- Primary Operational Indicators Claims Report.
- Derived Operational Indicators Report.
- Contribution Collection Report.

Reports			
Month Year Region	District	Product	HF Code
Month V 2017 VSelect Region		✓Select Product ✓	Select HF Code V

Fig. 197: Image 206 - Primary Operational Indicators - Claims Report Criteria

Reports			
Month Year Region	District	Product	HF Code
Month V 2017 VSelect Region		Select Product ✓	Select HF Code V



- Product Sales Report.
- Contribution Distribution Report.
- User Activity Report.
- 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

Reports			
	gion District Select Region V	Product Payment Type Select Product V Payment Type V	

Fig. 199: Image 208 - Contribution Collection Report Criteria

Reports			
Date From Date To Region Date To Select Region	District	Product ✓Select Product ✓	

Fig. 200: Image 209 - Product Sales Report Criteria

Reports				
Month Year Month V 2017 V	Region Select Region	District	Product Select Product	

Fig. 201: Image 210 - Contribution Distribution Report Criteria

Reports		
Date From Dat	te To User NameSelect UserName 🔽 ActionAll Actions 🔽 EntityAll entities	~

Fig. 202: Image 211 - User Activity Report Criteria

Reports						
Month Month V	Quarter Period 🗸	Year 2017 ✔	Region Select Region	District	Product ✓Select Product	V

Fig. 203: Image 212 - Enrolment Performance Indicators Report Criteria

Reports	
Region	District
TestRegion	Select a District

Fig. 204: Image 213 - Status of Registers Report Criteria

Reports		
Region	District	Enrolment Officer
TestRegion	Select a District	Select Enrolment C

Fig. 205: Image 214 - Insurees without photos Report Criteria

Reports			
Date From Date To	Region TestRegion	District Product Image: Construct of the second seco	duct 🔽

Fig. 206: Image 215 - Payment Category Overview Report Criteria

Reports				
Date From Date To	Region	District	Product	Payer
	TestRegion	Select a District 🔽	Select Product V	Select a Payer V

Fig. 207: Image 216 - Matching funds Report Criteria

Reports					
Date From	Date To	Region TestRegion	District Select a District -	- VSelect Product	HF Code
Claim Status Select Status	Status Select S	tatus 🗸			

Fig. 208: Image 217 - Claim Overview Report Criteria

Reports		
Date From Date To	District TestRegion ✓	

Fig. 209: Image 218 - Percentage of Referrals Report Criteria

Reports			
Date From Date To	Region District TestRegion Select a District	ict 🗸 Village	>
Status Select Status V			

Fig. 210: Image 219 - Families and Insurees Overview Report Criteria

Reports	
Date From Date To	District Enrolment Officer TestRegion

Fig. 211: Image 220 - Pending Insurees Report Criteria

Reports		
	Region District TestRegion Select a District N	Select Enrolment C
Sorting Renewal Date		

Fig. 212: Image 221 Renewals Report Criteria

ſ	Month	Year	Region	District	Product
l	Month 🗸	2017	 Select Region 	v	 Select Product

Fig. 213: Image 222 Capitation Payment Report Criteria

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.*

• 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 heath 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.*

• Date Selector Button

Clicking on the Date Selector Button will pop-up an easy to use, calendar selector (image223) 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.

September, 2012		12	•			
Su	Мо	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
Т	Foday	: Sep	temb	er 6,	2013	2

Image 223 - Calendar Selector - Search Panel

2. 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 (*Image 224 - Report Type Selector*) 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

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	•
- Teneward	

Fig. 214: Image 224 - Report Type Selector

3. 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.

4. 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 role Manager. The table below will provide an overview on primary indicators of the report.

	Code	Primary indicators	Dimension	Description
	P1	Number of policies	Time, Insurance prod- uct	The number of poli- cies 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<br="">day>)</effective>
	P2	Number of new poli- cies	Time, Insurance prod- uct	The number of new policies of given insur- ance product during a respective period (Enrolment date is within the respective period, there is no preceding policy with the same (or before converted) insurance product for given policy)
	Р3	Number of suspended policies	Time, Insurance prod- uct	The number of poli- cies for given insur- ance product that were suspended during a re- spective period (Status of the policy is Suspended, suspension took place within the respective period)
	P4	Number of expired policies	Time, Insurance prod- uct	The number of poli- cies for given insur- ance product that ex- pired during a respec- tive period (Status of the policy is Expired, expiration took place within the respective period)
	Р5	Number of renewals	Time, Insurance prod- uct	The number of policies that were renewed for given insurance prod- uct (or a converted one) during a respec- tive period (Enrolment date is within the respective period, there is a preceding policy with the same (or before converted) product for given family))
12	Р6	Number of insurees	Time, Insurance prod uct	(eb application User manual surees covered by poli- cies of given insurance product on the last day of a respective period

Below is an example of the report:

								back to s		<u>L.</u>				-			
14 4	1	4	of 2 🕨	ÞI	\Rightarrow	100)%		~			Find	Next	H -	۹		
						Pr	ima	y Operat	ional I	ndicato	rs-po	olicies					
eriod	: Year 2017 Region	: Tes	tRegion	Di	strict	: TestDi	strict	Product	: NF01								
Quarter:	1																
2017 Jan	uary																
Code	Name		Policy			New Po	icy	Suspended Policy	Expired Policy	Policy Renewal		Insuree			New Insuree		Co
		м	F	0	М	F	0				м	F	0	м	F	0	
NF01	National free enrolment													0	0		
	Total for 2017 January :													0	0		
2017 Feb	ruary																
Code	Name		Policy			New Po	icy	Suspended Policy	Expired Policy	Policy Renewal		Insuree			New Insuree		Co
		М	F	0	М	F	0				м	F	0	м	F	0	
NF01	National free enrolment													0	0		
	Total for 2017 February :													0	0		
2017 Mai	ch																
Code	Name		Policy			New Po	icy	Suspended Policy	Expired Policy	Policy Renewal		Insuree			New Insuree		Co
Lode																	

Fig. 215: Image 225 - 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 role Manager. The table below will provide an overview on primary indicators of the report.

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)
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 role Manager. The table below will provide an overview on the actual derived indicators provided by the report.

			<u>Go ba</u>	ck to selector	<u>.</u>
4 4 1		of 4 🕨 🔰 🖕		Find Ne:	xt 🖳 🛛 🍪
		Primary Operation	al Indicator	s-claims	
Region : Tes		trict : TestDistrictX1 Pr			
Region: res	Integionia Dis	Incl : TestDistrictAT PI	oduct: All		
TestDistrict4					
2017 January					
HFX01-Regiona	I hospital X				
Code	Name		Total Claims	Remunerated	Rejected Claims
			0	0	0
RF01	Regional free		0	0	0
		Total for HFX01 :	0	0	0
		Total for 2017 January :	0	0	0
2017 February					
HFX01-Regiona	I hospital X				
Code	Name		Total Claims	Remunerated	Rejected Claims
			0	0	0
RF01	Regional free		0	0	0
		Total for HFX01 :	0	0	0
		Total for 2017 February :	0	0	0
2017 March					
HFX01-Regiona	I hospital X				
Code	Name		Total Claims	Remunerated	Rejected Claims
			0	0	0
DE01	Decional free		n	n	0

Fig. 216: Image 226 - Preview - Primary Operational Indicators - Claims Report

	Code	rived indica- tors	Dimen- sion	Description	
	D1	In- curred claims ratio	Time, Insurance product	It is the ratio P11/P9	
	D2	Re- newal 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	Prompt- ness of claims settle- ment	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 settle- ment ratio	Time, Health facility, Insurance product	It is the ratio (P10- P12)/P10	•
	D6	Num- ber of claims per	Time, Insurance product	It is the ratio P10/P6	
7.6.	Tools	insuree			215
	D7	Average cost per claim	Time, Health facility,	It is the ratio P11/P10	

Below is an example of the report:

14 4		and the second se		Find Next 😾	• 🐵
	Derived	Operationa	I Indicators		
Region: 1	TestRegion District: TestDistrict1	Product: DF01			
TestDistric	+4				
2017 July					
HF01-Regio	onal hospital				
Code	Name	Claim Settlement Ratio	Average Cost per Claim	Satisfaction Level Fee	lback Response Ratio
DF01	District free enrolment	1	0.00	5.0	1
	Total for HF01:	1	0.00	5.0	1
HF02-Distri	ict1 health Center				
Code	Name	Claim Settlement Ratio	Average Cost per Claim	Satisfaction Level Fee	dback Response Ratio
DF01	District free enrolment	1	0.00	3.3	1
	Total for HF02:	1	0.00	3.3	1
Total for 2	017 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 One	erational Indicators - Printed on: 7/31/2017 1:46	27 PM			1 of 1

Fig. 217: Image 227 - Preview - Derived Operational Indicators Report

4. Contribution collection report

The report lists all actual payments of contributions according to insurance products in the defined period. The report can be used as input to an accounting system. The report can be run by users with the role Accountant. Payments are assigned to the specified period according to the actual date of payment.

Below is an example of the 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 role Accountant. Policies are assigned to the specified period according to their effective days.

Below is an example of the report:

6. Contribution distribution report

The report provides proportional amount of actually paid contributions allocated by openIMIS to specific months according to insurance products. The report can be run by users with the role Accountant. 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).

Below is an example of the 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 the role openIMIS Administrator. Below is an

1	of 1 🕨 🕅 💠 100%		Find Next	H , -	۵ 🔹	
	Contribution Collection Report					
District free enrolment, A	02/07/2017, Region: TestRegion, District: TestDistrict1, P ccount Code:	roduct: DF01 -				
TestDistrict1						
DF01	District free enrolment Acc Code :					
Payment Date	Рау Туре	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				
	DF01 Collection :	184,099.00				
	Total Collection in : TestDistrict1 :	184,099.00				
		184,099.00				
Contribution Collection Decode D	rinted on: 7/2/2017 2:10:42 PM	1 of 1				

Fig. 218: Image 228 - Preview – Contribution Collection Report

<u>Go back to selector.</u>		
I4 4 1 of 1 ▷ ▷I ↓	Find Next	🔍 - 📀
Product Sales		
Date From 01/07/2017 To 31/07/2017, Region: TestRegion, Product: RX0 fixed enrolment, Account Code: Rx01C	1 - Regional	
TestDistrict1		
RX01		
Effective Date	Amount	
01/07/2017	31,000.00	
04/07/2017	10,000.00	
RX01's Collection :	41,000.00	
Total Collection in : TestDistrict1:	41,000.00	
TestDistrict2		
RX01		
Effective Date	Amount	
04/07/2017	10,000.00	
RX01's Collection:	10,000.00	
Total Collection in : TestDistrict2:	10,000.00	
Total Sales :	51,000.00	
Product Sales - Printed on: 7/31/2017 1:53:00 PM	1 of 1	

Fig. 219: Image 229 - Preview – Product Sales Report

				Find Next	₽ • 🚯
	C	ontribution Distri	ibution		
Year: 2017, I	Region: TestRegion Distrie	ct: TestDistrict1			
	• • •				
District TestDis	strict1				
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 Dis	tribution - Printed on: 7/31/2017 1:57	7:37 PM			1 of 1

Fig. 220: Image 230 - Preview - Contribution Distribution Report

example of the report:

8. enrolment performance indicator report

The report provides overview of activity of enrolment officers. The report can be run by users with the role Manager. Below is an example of the report:

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 role Scheme Administrator. Below is an example of the report:

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 role Accountant. Below is an example of the report:

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 role Accountant. Below is an example of the report:

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 role Accountant. 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). Below is an example of the report:

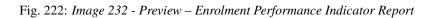
13. payment category overview

The report provides split of total contributions according to their categories. The report can be run by users with the role Accountant. Contributions are assigned to the specified period according to actual payment date. Below is an example of the report:

14 4 •	of 41 🕨 🚺	Go back to selector.	0
	of 41 🕨 🕅		<i>٣</i>
		User Activity Report	
Period From 01/07/201	7 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.:11111191	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

Fig	221.	Image 231	- Preview -	User Activity	Report
1 15.		image 251	1 / C / / C //	Ober menning	nepon

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	-				N.	_					~						
						E	nrol	ment Pe	rforma	ince Inc	licato	ors					
eriod :	Year 2017 Region	: Test	RegionX	Di	strict	t: TestDist	rictX	1 Produc	t: RX001								
,																	
Enrolmer	It Officers Code	E011 - J	John Enroli	ment1			Active										
Quarter:	1																
2017 Jan	uary																
Code	Name		Policy			New Policy	/	Suspended	Expired	Policy		Insuree			New Insuree		С
								Policy	Policy	Renewal							
		М	F	0	м	F	0				М	F	0	м	F	0	
RX001	Regional X product																
	2017 January :																
2017 Feb	ruary																
Code	Name		Policy			New Policy	,	Suspended	Expired	Policy		Insuree			New Insuree		C
couc	Hame		roncy			Hew rones		Policy	Policy	Renewal		mauree			New mource		
		м	F	0	м	F	0				м	F	0	м	F	0	
RX001	Regional X product			-		-	-					-	-		-	-	
0001	2017 February :																
	-																
2017 Mar	ch																
Code	Name		Policy			New Policy	/	Suspended	Expired	Policy		Insuree			New Insuree		С
								Policy	Policy	Renewal							
		м	F	0	м	F	0				М	F	0	м	F	0	
2X001	Regional X product																



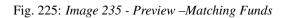
Status of Registers Region: TestRegion District: TestDistrict1 District Name No of Enrolment Officers No of Users No of Insurance Products No of Health Facilities No of Service Pricelists No of Services No of Medical Items Active Non-Active Non-Active						Find					
District Name No of Enrolment Officers No of Users No of Insurance No of Health No of Service No of Item No of Services No of Medical Products Facilities Pricelists Pricelists Items					egisters	Status of R					
Products Facilities Pricelists Items								istrict1	istrict: TestD	egion D	Region: TestR
Active Non-Active	No o		No of Services					No of Users	ment Officers	No of Enrol	District Name
									Non-Active	Active	
TestDistrict1 4 13 3 2 2 2 10 5		5	10	2	2	2	3	13		4	TestDistrict1
Total 4 13 3 2 2 2				2	2	2	3	13		4	Total

Fig. 223: Image 233 - Preview – Status of Registers Report

14 4 1	of 1 🕨	Go back to selector. >	Find Next 🛛 🔍	• 🐵
	le le	surees without Photos		-
Region: TestReg	ion District: TestDistri	ict1 Enrolment Officer: E001 - Fox	James	
District: TestDistrict1				
Enrolment Officers: E	E001 - Fox James	(Active)		
Municipality: TestMu	nicipality11			
Village: TestVillage11	1			
Insurance Number	Last Name	Other Names	Gender	IsHead
00001	Soni	Hiren	М	Yes
000011	Soni	Nisha	F	No
000012	Soni	Pooja	F	No
000013	Hindocha	Dhyey	F	No
11111111	Gatsby	John	м	Yes
11111112	Gatsby	Elis	F	No
11111121	Bock	John	м	No
11111122	Bock	Elly	F	No
11111123	Bock	James	м	No
11111124	Bock	Julia	F	No
11111125	Bockwurst	Peter	м	No
111111131	Glenn	Gilmour	м	Yes
11111132	Glenn	Julia	F	No
11111133	Glenn	John	м	No
111111140	Fuchs	Elis	F	No
111111141	Fuchs	Konrad	м	Yes
111111142	Fuchs	Elis	F	No
111111143	Fuchs	Jane	F	No
1111111/	Fuche	Luciana	M	No

Fig. 224: Image 234 - Preview – Insurees without photos

14 4	1	of 1 🕨 🕅 💠 📃		Find Next	🛃 🔹 😨			
			Matchin	g Funds				
Product : R	F01 - Regional free Region : T	estRegion District : TestDistrict1	Period From 01/01/201	17 To 31/07/2017	,			
insurance Num	ber	Birth Date Municipality	VIIIage	Enrol Date	Payment Date Receipt No.	Payers		
555444331	Ripper Jack	15/06/2004 TestMunicipal	y11 TestVillage111	23/07/2017	23/07/2017 sdc1			1
555444332	Ripper Jane	14/06/1994						
555777999	Wein Jack	27/07/1996 TestMunicipali	y12 TestVillage122	05/07/2017	17/07/2017 asq12			1
555777992	Wein Ells	27/07/1973						
							Total	2
	- Printed on: 7/31/2017 3:26:42 PM							



	1	012		Y		Find Next 😾						
					Claim Ove							
leath Facil ode	Date Claim Admin	pital Regio	visit From	Visit To Insurance	-	m 01/01/2017 To 31/0 Status		j. Resson	Claimed	Approved	Adjusted	Pal
107	03/01/2017 Book John		01/01/2017	02/01/2017 1111113	I Glenn Glimour	Valuated		0	8.500.00	6,500.00	6,500.00	6,500.0
ervice Code	Org.Qty	Adj.Qty	Rej. Service	Rej. Reason								
(105	1.00		X105	4								
1	10/05/2017 Book John		10/05/2017	10/05/2017 11111112	1 Bock John	Valuated		0	9,300.00	3,000.00	2,500.00	2,500.0
ervice Code	Org.Qty	Adj.Qty	Rej. Service	Rej. Reason	Item Code	Org.Qty	Adj.Qty	Rej. Item	Rej. Reason	٦		
101	1.00	0.00	X101	10	Y201	1.00	0.00	Y201	10	1		
102	1.00	0.00	X102	10				Y203	4			
(103	1.00		X103 X105	10								
m1	22/05/2017 Book John		22/05/2017	22/05/2017 11111114	Fuche Konrad	Valuated		0	8,500.00	3,000.00	2,850.00	2,850.0
ervice Code	Org.Qty	Adj.Qty	Rej. Service	Rej. Reason	Item Code	Org.Qty	Adj.Qty	Rej. Item	Rej. Reason			
101	1.00		X101	10	Y201	1.00	0.00	Y201	10			
105	1.00	0.00	X105	4	Y203	1.00	0.00	Y203	4			
lm2	22/05/2017 Book John		22/05/2017	22/05/2017 11111114	2 Fuche Elle	Valuated		0	9,200.00	4,700.00	4,000.00	4,000.0
ervice Code	Org.Qty	Adj.Qty	Rej. Service	Rej. Reason	Item Code	Org.Qty	Adj.Qty	Rej. Item	Rej. Reason			
101	1.00		X101	10	Y201	1.00	0.00	Y201	10			
(102	1.00	0.00	X102	10	Y203	1.00	0.00	Y203	4			
m5	23/05/2017 Book John		21/05/2017	22/05/2017 11111114	2 Fuchs Ells	Valuated		0	20,200.00	1,700.00	1,620.00	1,620.0
ervice Code	Org.Qty	Adj.Qty	Rej. Service	Rej. Reason	Item Code	Org.Qty	Adj.Qty	Rej. Item	Rej. Reason	7		
106	50.00	0.00	X106	16	Y204	10.00	0.00	Y204	5	1		
					Y203	1.00	0.00	Y203	4			
me	23/05/2017 Book John		23/05/2017	23/05/2017 1111114	3 Fuchs Jane	Valuated		0	300.00	300.00	300.00	300.0

Fig. 226: Image 236 Preview – Claim Overview

Go back to selector. I4 1 of 1 ▶ ▶ ↓ Find Next ↓ •							
	Payment Category Overview						
Region : Tes	tRegion District : TestDistrict1	Date From01/01	/2017Date To31	/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							

Fig. 227: Image 237 - 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 role Accountant. Below is an example of the report:

	of 2 🕨 🚺	4	Find Next 🔍	• 🛞
	Families and	l Insurees Overvie	W	
Region : Te	stRegion District : TestDistrict1	Period From 01/01/2017	' To 31/07/2017	
Insurance Number	Name	Enrol Date	Status	
Region :Test	Region			_
District :Test	District1			
Municipality	:TestMunicipality11			
Village : Test	Willage111			
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		

Fig. 228: Image 238 - Preview - Families and Insurees Overview Report

15. Percentage of Referrals 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:

- 1. The number of visits (claims) of the primary health care facility in the selected period.
- 2. 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.
- 3. 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 role Accountant. Below is an example of the report:

16. Pending Insurees report

The report lists all insurces whose photos have been sent to openIMIS but who has no record in openIMIS yet. The report can be run by users with the role Accountant. Below is an example of the report:

17. Renewals report

The report lists all renewed policies in given period for given insurance product and optionally for given

Go back to selector. I I of 1 ▶ ↓ ↓ Find Next ↓ ◆							
Percentage of Referrals							
Region : TestRegion District : TestDistrict1 Period From 01/06/2017 To 31/07/2017							
Heath Facility	Total Claims	Referral(OP)	Referral(IP)				
HF02 - District1 health Center	2						
ni vz - District neatti Gentel							

Fig. 229: Image 239 - Preview - Percentage of Referrals Overview Report

Image: Second state of the
-
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
444555666 06/07/2017
Total Insurees : 3
Total Insurees : 3
Pending Insurees - Printed on: 7/31/2017 4:32:40 PM 1 of 1

Fig. 230: Image 240 - Preview - Pending Insurees Report

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 role Accountant. Below is an example of the report:

				Go back to sel	lector.			
4 4 1	14 4 1 of 1 🕨 🕅 🐠 🔄 Find Next 💐 🔹							
	Renewals							
Product: RF	01 - Regional free R	Region : TestRegio	on District :	TestDistrict1 Peri	iod From 01/06/2	017 To 31/07/2017		
Enrolment Officers Code	Enrolment Officer	Municipality	Village	Insurance Number	Insuree	Renewal Date	Receipt No.	Payers
	Enrolment Officer James Fox	Municipality TestMunicipality11	-	Insurance Number 555444331	Insuree Jack Fox	Renewal Date 23/07/2017	Receipt No. sdc1	Payers

Fig. 231: Image 241 - 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 role Accountant. Below is an example of the report:

14 4 1	of	1 🕨 🕅	4	100%	ack to sele	<u>CTOF.</u>		Find Next	🔍 - 📀 🛔	
			,						~ ~ ~	
				Capit	ation Pay	ment				
Region: Tes	tRegionY, Product: RY0	01 - Regi	onal free	Y , Month: Octo	ber, Year: 20	17				
Level 1 H	ealth Centre Level 2	Dispensary		Level 3	Level 4					
Sub Level 1	Sub Level 2		s	ub Level 3	Sub Lev	vel 4				
	Weght of Number of Families	10	Weight of	Number of Insured Fa	milies 20	We	ight of Number of V	isits 20	Share of Contribution 60)
			-				-			
	Weight of Population	10	v	Veight of Insured Popu	lation 20	Wei	ght of Adjusted Ame	ount 20		
HF Code	HF Name		Account Code	Population	Number of Families	Number of Insured Population	Number of Insured Families	Number of Claims	Adjusted Amount	Capitatio Paymei
TestRegionY										
TestDistrictY1										
HFY2	District health centre Y 1			3,020.00	50.00	5.0	0 2.00	2.00	5,100.00	292,405.6
HFY3	District health centre Y 2			1,400.00	30.00	2.0	0 1.00	2.00	5,000.00	185,687.6
District Total				4,420.00	80.00	7.0	0 3.00	4.00	10,100.00	478,093.2
TestDistrictY2										
HFY4D	Dispensary Y 1		AHFY4D	5,000.00	50.00	5.0	0 2.00	4.00	10,200.00	402,125.7
HFY5D	Dispensary Y 5		AHFY5D	1,400.00	30.00	2.0	0 1.00	1.00	2,500.00	140,615.7
District Total				6,400.00	80.00	7.0	0 3.00	5.00	12,700.00	542,741.4
Region Total				10,820.00	160.00	14.0	0 6.00	9.00	22,800.00	1,020,834.6
Allocated Conti	ibution			102,083.47	102,083.47	204,166.9	4 204,166.94	204,166.94	204,166.94	
Unit Price				9.43	638.02	14,583.3	5 34,027.82	22,685.22	8.95	
IMIS - Report Pr	inted on: 10/18/2017 11:26:37 A	٩M								1 of 1

Fig. 232: Image 242 - Preview – Capitation Payment Report

7.6.6 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

Home Insurees and Policies Claims Administration	Tools My profile Logout Search Insurance 🔽 🖸
Good Morning Jiri Nemec	Registers v18.1.2 ß
Roles	Policy Renewals
Enrolment Officer Manager	Feedback Prompts
Accountant Clerk	Extracts
Medical Officer Scheme Administrator INIS Administrator	Reports
Receptionist Claim Administrator	Utilities
Claim Contributor Region Capital	Funding

Fig. 233: Image 243 - Navigation Utilities

Clicking on the sub menu Utilities re-directs the current user to the Utilities Page.

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	2	v16.3.0
			Bac	ckend Ve	ersion: 1.2				
BACKUP	•								
C:\AutoIMI	S-DB-Backups	Save path						B/	аскир
RESTOR	E								
								RE	STORE
EXECUT	E SCRIPT								
Choose F	ile No file chosen							EX	ECUTE
									ancel

Fig. 234: Image 244 - 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 heck 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.



Fig. 235: Image 245 - 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.



Fig. 236: Image 246 - Backup is in progress

Execute script

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" 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.

7.6.7 Funding

Access to the Funding is restricted to the users with the role of Accountant.

The Funding is the place where funding from external authorities (payers) can be for 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

Home Insurees and Policies Claims Administration	Tools My profile Logout Search Insurance V 🖸 👔
Good Morning Jiri Nemec	Registers v18.1
Roles	Policy Renewals
Enrolment Officer Manager	Feedback Prompts
Accountant Clerk Medical Officer	Extracts
Koleme Administrator MIS Administrator	Reports
Receptionist Claim Administrator	Utilities
Claim Contributor Region Copital	Funding

Fig. 237: Image 247 - Navigation Funding

Clicking on the sub menu Funding re-directs the current user to the Funding Page.

Funding Page

1. Data Entry

• 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

Home	Insurees and	1 Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No V	7
[Funding—									
	Region	Select Re	gion 🔻]					
			District 🔻]					
	Product		•	1					
]					
			Payer 🔻]					
	Payment Date								
	Contribution Paid								
	Receipt Number								
	_								
Save	•								Cancel

Fig. 238: Image 248 - Funding Page

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.

7.7 Password change

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

7.7.1 Navigation

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

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No VD	7	v16.3.0
Current User Jiri Nemec (jiri) Roles Enrolment Offi Manager Accountant Clerk) cer				Change Passv	vord			

Fig. 239: Image 249 - Navigation Change Password

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

7.7.2 Change Password Page

5. Data Entry

• Current Password

Enter the password of the current user.

• New Password

Home	Insurees and Policies	Claims	Administration	Tools	My profile	Logout	Search Insurance No	?	v16.3.0
Change Pas	sword	Current Pas	sword						
		New Pas							
		Confirm Pas	sword						
Save									Cancel

Fig. 240: Image 250 - Change Password Page

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

• Confirm Password

Repeat the new password of the current user.

6. 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 *Home Page*. A message confirming that the new password has been saved will appear at the bottom.

7. 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).

8. Cancel

By clicking on the Cancel button, the user will be re-directed to the Home Page

7.8 Offline mode

7.8.1 Introduction

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.

7.8.2 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 (*Image 251 - Enter HF ID - HF Administrator Login, openIMIS offline*), (*Image 252 - Enter Scheme Office ID - offline Scheme Administrator Login, openIMIS offline*), only once for that very first time of logging in.

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 (*Image 253 - Information Bar – Scheme Office, openIMIS offline*), (*Image 254 - Information Bar - Health Facility, openIMIS offline*).

3. MENUS ACCESS

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.

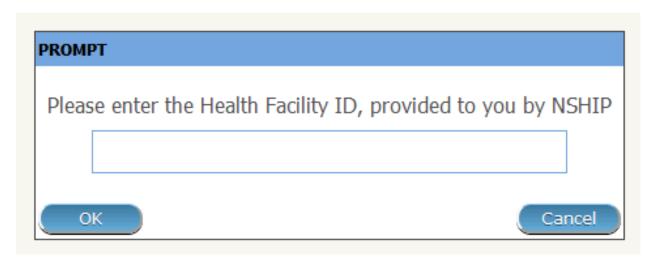


Fig. 241: Image 251 - Enter HF ID - HF Administrator Login, openIMIS offline

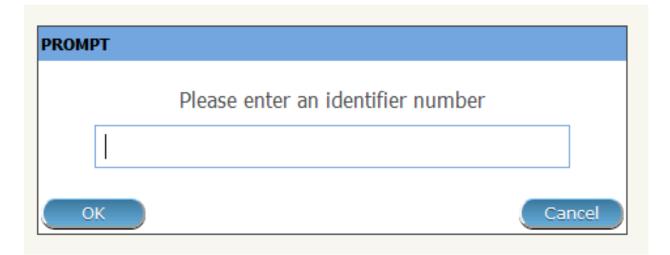


Fig. 242: Image 252 - Enter Scheme Office ID - offline Scheme Administrator Login, openIMIS offline



Fig. 244: Image 254 - Information Bar - Health Facility, openIMIS offline

• 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 (*Image 255 - Extracts Control Page, HF Administrator, openIMIS offline*), (*Image 256 - Extracts Control Page, Offline Scheme Administrator, openIMIS offline*) 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

	Home	Insurees and Policies	Claims	Administration	Tools	Logout	Search NSHIP No	V	17
1	mport Exti	act							
A	Choose File	No file chosen							Upload
	mport Pho	tos							
В	Choose File	No file chosen							Upload
	ownload (laim XMLs							
c									Download
									Cancel
E	No previo	is extracts found!							OFF-LINE HF :

Fig. 245: Image 255 - Extracts Control Page, HF Administrator, openIMIS offline

• 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 (*Image 256 - Extracts Control Page, Offline Scheme Administrator, openIMIS offline*) 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 (*Image 257 - Select File Popup*)

Home	Insurees and Policies	Claims	Administration	Tools	Logout	Search NSHIP No	V	17
Import E	xtract							
A Choose F	ïle No file chosen							Upload
Import P	hotos							
B Choose F	ile No file chosen							Upload
Download	d Enrolment XMLs							
c								Download
Þ								Cancel
ENo prev	ious extracts found!							OFF-LINE CHF: 500

Fig. 246: Image 256 - Extracts Control Page, Offline Scheme Administrator, openIMIS offline

Open		×
🕖 🗸 🖡 🕨 DEVB 🔸 Downloads	✓ ⁴ → Search Downloads	٩
Organize 🔻 New folder	} ≡ ▼	10
🖈 Favorites	Date modified	Туре
Desktop	26/07/2013 15:46	WinRAR arch
Downloads 🛛 🖉 OE_F_0_5.RAR	26/07/2013 15:17	WinRAR arch
🖫 Recent Places 🛛 🗎 OE_F_0_6.RAR	26/07/2013 15:57	WinRAR arch
Libraries Documents Music Pictures Videos Local Disk (Ci) ✓ ✓		, P Cancel

Fig. 247: Image 257 - Select File Popup Window, Import Extracts, openIMIS offline

Window, Import Extracts, openIMIS offline), (Image 258 - Popup Window, Import Extracts, HF Administrator, openIMIS offline).

User cannot import an extract whose sequence number is same as last one imported; if done so, a popup message (*Image 260 - Popup Window, Wrong sequence of an extract file, openIMIS offline*) will be shown.

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 (*Image 261 - Select File Popup Window, Import Photos, openIMIS offline*), 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 (*Image 261 - Select File Popup Window, Import Photos, openIMIS offline*).

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

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 (*Image 262 - Popup Window, Import Photos, openIMIS offline*) will appear, notifying the user. Otherwise enrollments will be downloaded in a zipped file and a confirmation popup message (*Image 264 - Popup Window, Download Enrolments, openIMIS offline*) will appear

• 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:

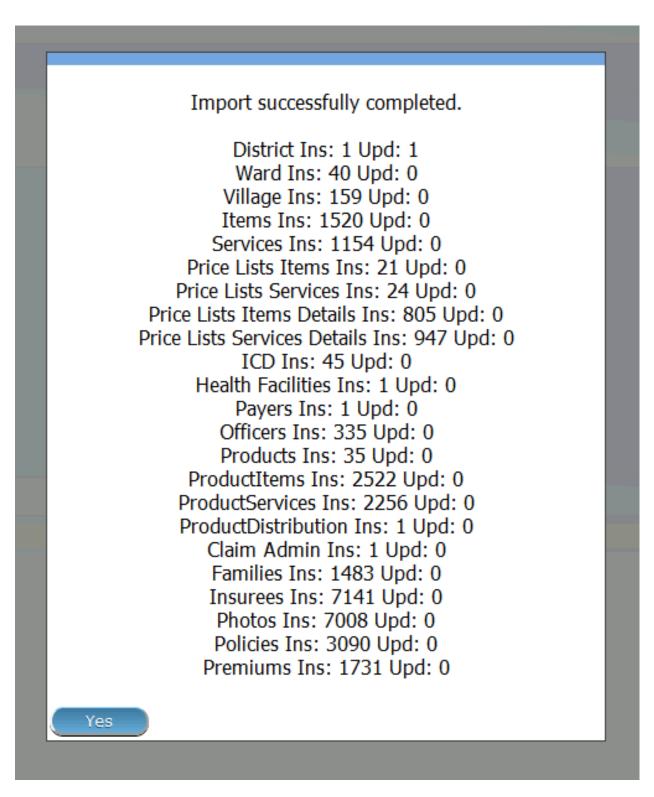
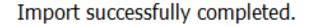


Fig. 248: Image 258 - Popup Window, Import Extracts, HF Administrator, openIMIS offline



District Ins: 12 Upd: 1 Ward Ins: 242 Upd: 0 Village Ins: 854 Upd: 0 Items Ins: 1520 Upd: 0 Services Ins: 1154 Upd: 0 Price Lists Items Ins: 61 Upd: 0 Price Lists Services Ins: 42 Upd: 0 Price Lists Items Details Ins: 7222 Upd: 0 Price Lists Services Details Ins: 2843 Upd: 0 ICD Ins: 45 Upd: 0 Health Facilities Ins: 586 Upd: 0 Pavers Ins: 1 Upd: 0 Officers Ins: 1162 Upd: 0 Products Ins: 94 Upd: 0 ProductItems Ins: 8336 Upd: 0 ProductServices Ins: 7003 Upd: 0 ProductDistribution Ins: 803 Upd: 0 Claim Admin Ins: 1 Upd: 0 Families Ins: 9473 Upd: 0 Insurees Ins: 46932 Upd: 0 Photos Ins: 45935 Upd: 0 Policies Ins: 19104 Upd: 0 Premiums Ins: 9790 Upd: 0

Yes

Fig. 249: Image 259 - Popup Window, Import Extracts, Offline Scheme Administrator, openIMIS offline

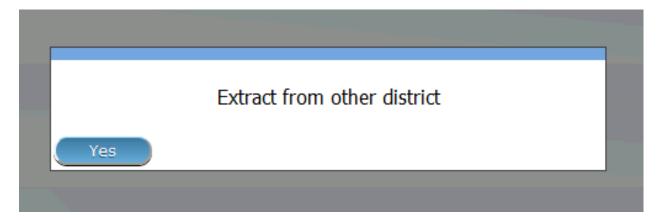


Fig. 250: Image 260 - Popup Window, Wrong sequence of an extract file, openIMIS offline

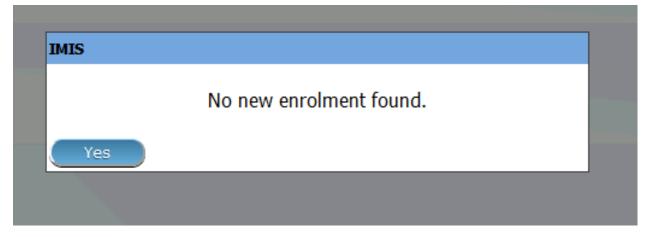


Fig. 251: Image 261 - Select File Popup Window, Import Photos, openIMIS offline

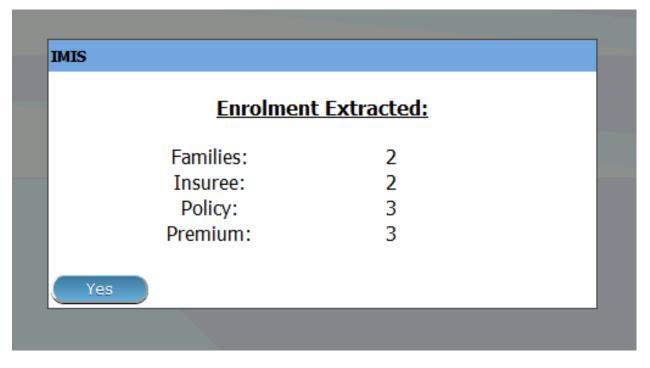


Fig. 252: Image 262 - Popup Window, Import Photos, openIMIS offline

No previous extracts found!

OFF-LINE | CHF: 1

Fig. 253: Image 263 - Popup Window, Download Enrolments, openIMIS offline

1. 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

No claims found.

OFF-LINE HF 00947:Mirembe Referal

Fig. 255: Image 265 - openIMIS Extracts, Information Bar, openIMIS offline

2. 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.

User Details		
	Check All	Check All
	(Role	District
	ROLE	DISTRICT
Language English	Receptionist	
	Claim Administrator	V Dunniy
Last Name Admin	HF Administrator	
Other Names Admin		
Phone Number		
Login Name Admin		
Password ••••		
Confirm Password		
Health Facility		

Fig. 256: Image 266 - openIMIS Extracts, Information Bar, openIMIS offline

3. No claims Found

When HF offline openIMIS user is downloading offline claims and no new offline claims is found, this message is displayed.

User Details		Check All	Check All
		Role	
		ROLE	DISTRICT
Language		CHF Clerk	Dummy
Last Name	Admin		
Other Names	Admin		
Phone Number			
Login Name	Admin		
Password	••••		
Confirm Password	••••		
Health Facility	\checkmark		

Fig. 257: Image 267 - openIMIS Extracts, Information Bar, openIMIS offline

• USERS

Users with role HF Administrator, can create only users with roles: **Receptionist**, **Claim Administrator** and **HF Administrator** (*Image 268 - Users Page - HF Administrator*, *openIMIS offline*). User with role 'offline NSHIP Administrator', can create only user with role: **Clerk** (*Image 269 - Users Page - Offline Scheme Administrator*, *openIMIS offline*).



Fig. 258: Image 268 - Users Page - HF Administrator, openIMIS offline

- 4. data access
 - Search / Find

In all pages in Insurees and Policies menus with search / find acility, there will be an extra search criteria (image 270) to enable search for offline data only. This feature is available if a user is in Offline IMIS.

• 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

7.9 Analytic and reporting component

The Analytic and Reporting component of the Insurance Management Information System (AR-IMIS) provides managerial data for management of health insurance schemes supported by IMIS, allows easy and speedy analysis of these data with the objective to reveal causes of different phenomena encountered in supported health insurance schemes. Provided data allow also monitoring of developments within supported health insurance schemes and identification of potential errors in operational data.

7.9.1 Concept of AR-IMIS

The concept of AR-IMIS is based on populating of the Data Warehouse with aggregate data from the operational database of IMIS. This populating is done automatically and regularly (usually once a week) from the operational database by Extract, Transformation and Loading process (ETL). Within this process data from the operational

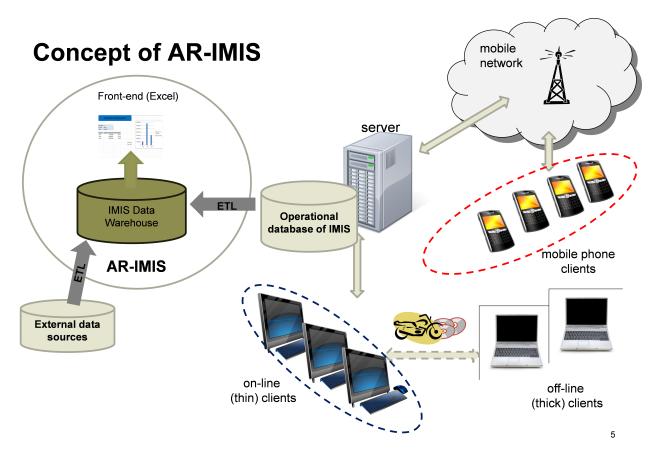


Fig. 259: Image 269 - Users Page - Offline Scheme Administrator, openIMIS offline

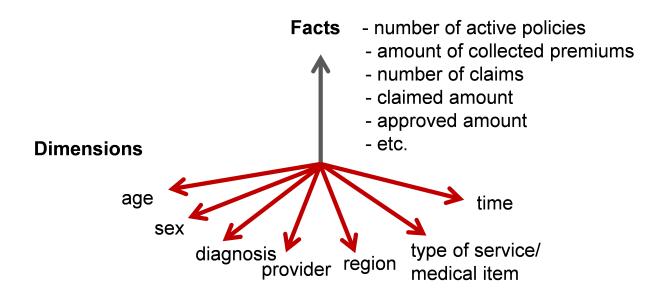


Fig. 260: Image 270 - Search Criteria - offline only data, openIMIS offline

Enrolment & Policies	Claims
Revenue	Utilization of health care
Feedbacks	Expenditures for health care

database are aggregated and stored in the Data Warehouse in conformance with multidimensional data model (*Image 271 - Concept of AR-IMIS*).

Fig. 261: Image 271 - Concept of AR-IMIS

This model is suitable for analysis of data. Questions like "What is the number of newly covered insurees by an insurance product at during a calendar period and who were of an age, a gender, lived in a location and were cared for by a enrolment officer? Data in the multidimensional Data Warehouse are presented by a suitable front-end tool. Currently AR-IMIS uses MS Excel as the front-end presentation tool. An Excel file is remotely connected to the Data Warehouse and data are stored in the Excel file in the form of so called pivot tables. The multidimensional model is based on the notion of facts and dimensions. The facts (indicators) are what we are interested in. For example, a fact may number of insured persons, number of active policies, number of submitted claims etc. Facts can be looked at from different angles-for example from the point of view of age and gender of insured persons, from the point of view of time period etc. These angles (points of view) are captured by the notion of dimensions that are used for qualification of facts (*Image 272 - Facts and dimensions*).

A dimension is composed from points that represent specific values in the dimension for which we want to look at facts-for example *November* 2015 may be one point in the Time dimension. Points of a dimension may be organized in hierarchies. Higher levels of hierarchies represent more aggregate views. Going to the lower levels by so called *drill down* operation we can analyze facts in more detail-for example we may drill down from calendar years to quarters of corresponding calendar years and further to months. We can go in an opposite direction and look at facts from more aggregate points of view (*drill up*).For example from looking at the amount of collected contributions in calendar months we can look at the same indicator according to quarters of a year or according to calendar years.

Facts with related meaning and the identical set of qualifying dimension are represented in the multidimensional model of the Data Warehouse as so called cubes. We can do other operations on cubes as for example *slicing* when we select one or several points in one dimension and look at the rest of cube or dicing when we select on or several points in two or more dimensions. All such operations allow analysis of data in the Data Warehouse in an easy and comprehensive way.

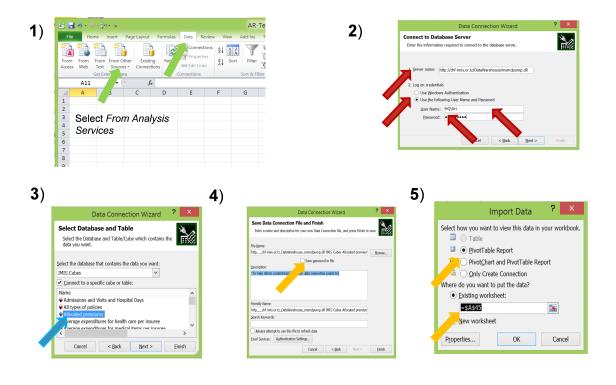


Fig. 262: Image 272 - Facts and dimensions

7.9.2 Dimensions

Dimensions represent our point of view on facts. Each dimension has several values (points). The points are used for qualification of our view on the facts. AR-IMIS provides values of facts corresponding to specified points across one or more dimensions. The points may be organized in hierarchies. Lower levels of a hierarchy allow looking at a fact according to more specific points. For example, the most important *Time* dimension has at the lowest level calendar months. The calendar months are grouped into quarters and quarters into calendar years. So, we can get a value of a fact corresponding to a specific quarter and going even up we can get a value of the fact corresponding to a specific quarter and going even up we can get a value of the fact corresponding to a specific quarter and going even up we can get a value of the fact corresponding to a specific quarter and going even up we can get a value of the fact for all points together in the given dimension.

AR-IMIS defines several dimensions. Their meaning is dependent on the context of a fact for which they are used. For example, for the fact *Number of submitted claims* the *Time* dimension means in AR-IMIS a period in which claimed health care was provided. It could have also other interpretations, for example, it may be a period in which claims were submitted. Exact interpretation of each dimension is indicated with description of each fact provided below.

The points of a dimension are either fixed, e.g. the points *Sex* are *Male/Female/Undefined* for the dimension, or are obtained from registers in the operational part of IMIS. For example, the points for the dimension *Services* are obtained from the current status of the register of services in IMIS.

The following table shows dimensions used across AR-IMIS. For each dimension its name, names of attributes used for referencing of their points, source for their points, and their meaning.

Table 9.1 Overview of dimensions

9

7.9.3 Facts

Facts provided by AR-IMIS can be structured into the areas according to (*Image 273 - Areas of facts*). Within each area several facts packed into one or several cubes are provided. Facts are packed into the same cube if they have an associated meaning and are provided with the same set of dimension. The following articles lists available cubes according to the areas, for each cube indicates available facts with description of their meaning and

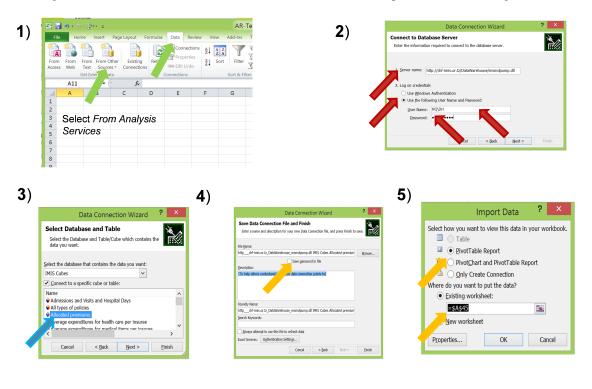


Fig. 263: Image 273 - Areas of facts

underlying set of qualifying dimensions. If meaning of a dimension is not straightforward, its description is provided. It relates especially to the *Time* dimension where it is important which datum related with a fact is taken as the governing date for association with given point (period) in the *Time* dimension.

Facts on enrolment and policies

This group of facts relates to acquisition of insures and development of coverage by health insurance schemes. Facts available are listed in *Table 9.2*

9

Cube	Fact	Meaning	Di-	Comment
			men-	
			sion	
Popula-	Popula-	Number of inhabitants	Gen-	
tion	tion		der	
			Re-	
			gion	
NT 1	NT 1		Time	
Number	Number	Number of households	Re-	
of fam- ilies/gr oups	of fam- ilies/gr oups	according to a census	gion	
oupo			Time	
Current	Current	Insurees covered by at	Age	Age at the end of a time period
and new insurees	insurees	least one policy active at the end of a time period		
			Gen-	
			der En-	An annalment officer reconcible for componenting
			rol- ment	An enrolment officer responsible for corresponding policy
			Offi-	
			cers	
	New acquired insurees	Insurees newly insured during a time period	Re- gion	Place of living of a household
	msurces		Prod-	An insurance product covering an insuree
			ucts	
			Time	Period of enrolment of insurees for new insurees
				Period of effective day and later of their policies for current insurees
All	Current	Number of active poli-	Age	Age of the head of a household at the end of a time
types of policies	policies	cies at the end of a time period		period
	Expired policies	Number of policies that expired during a time pe- riod	Gen- der	Gender of the head of a household
	Renewed	Number of policies that	En-	An enrolment officer responsible for correspondi ng
	policies	were renewed during a	rol-	policy
		time period	ment	
			Offi-	
			cers	
	Sold	Number of policies that	Re-	Place of living of a household
	policies	were sold during a time period	gion	
		-	Prod-	An insurance product of a policy
			ucts Time	Period of enrolment date for sold policies
			Inne	Period of expiry date for expired policies
				Period of renewal date(when renewing was done) for
				renewed policies
				Period of effective day and later for current policies
Share of insured	Share of insured	=Current insures / Popu- lation	Gen- der	
popula- 246 tion	popula-	at the end of a time pe-		Chapter 7 Web application was many
tion	tion	riod	Re-	Chapter 7. Web application user manua Place of living of a household
			gion	I mee of itying of a nousehold
			Prod-	An insurance product covering an insuree

Table 9.2 Facts on enrolment and policies

Facts on collected revenue

This group of facts relates to revenue of health insurance schemes. Facts available are listed in Table 9.3.

Cube	Fact	Meaning	Dimen-	Comment
		_	sion	
Contri-	Contri-	Contributio ns collected in given time	Enrol-	Collection of contributio ns from
butio n	butio n	period	ment	policies of an enrolment officer
collection	collected		Officers	
			Payers	Collection of contributio ns from
				an institution al payer or from fam-
				ilies itself
			Prod-	Collection of contributio ns within
			ucts	an insurance product
			Time	Period of payment date of contri-
				butio ns
Contri-	Contri-	Amount of collected contributio ns al-	Prod-	Allocation of contributio ns within
butio n	butio n	located proportiona lly for using in a	ucts	an insurance product
allocation	allocated	time period		
			Time	Period of allocation of contributio
				ns

Table 9.3 Facts on contributions

Facts on claims

This group of facts relates to claims forwarded by health care providers to administrators of health insurance schemes. Facts available are listed in *Table 9.4*.

Cube	Fact	Meaning	Di- men- sion	Comment
Claim details	Amount claimed	Total amount in nominal prices that was submit- ted by health care providers for health care pro- vided in given period		erBroviders that entered and or submitted claims
	Amount rejected	Total amount that was on totally rejected claims	Time	Time period of provision of health care that was in- voiced in claims
	Entered claims	Number of claims entered		
	Submitted claims	Number of claims submitted		
	Rejected claims	Number of claims totally rejected		
	Average amount claimed	=Amount claimed/ Submitted claims		
	Average amount rejected	=Amount rejected/ Rejected claims		
Claim details products	Amount adjusted	Amount adjusted after processing in nominal prices	Provid	erBroviders that submitted claims
	Amount paid	Amount actually to be paid to health facilities taking into account indexes of relative pricing	Prod- ucts	Products by which health care claimed was covered
	Processed claims	Number of claims sent for valuation	Time	Time period of provision of health care that was in- voiced in claims
	Paid claims	Number of claims actually valuated		
	Average amount adjusted	=Amount adjusted/Pr ocessed claims		
	Average amount paid	=Amount paid/ Valuated claims		

Table 9.4 Facts on claims

Facts on utilization of health care

This group of facts relates to utilization of health care by insures according to submitted and not rejected claims. Facts available are listed in *Table 9.5*

Cube	Fact	Meaning	Dimension	Comment
Admissions and vis- its and hospital days	Number of hospital admissions	Number of hospital admissions	Age	Age at the time of provision health care
			Gender	

Continued on next page

Cube	Fact	Meaning	Dimension	Comment
			Disease	
	Number of hospital		Care category	
	days			
	Average length of	= Number of hospi-	Products	In case two or more
	stay	tal days/ Number of		insurance products
		hospital admissions		covered a hospital
				admission/v isit, it is
				accounted to each of
				them
	Number of out-		Providers	Providers which
	patient visits			claimed health care
			Time	Hospital admissions
				are associated with
				time periods accord-
				ing to dates of dis-
				charge. Time pe-
				riod of provision of
XX.'1' C	0 1 11 1			health care
Utilization of ser-	Services utilized	Number of utilized	Age	Age at the time of
vices		services according		provision health
		to submitted claims. If a service was		care
		provided during		
		one visit/hospi tal		
		stay, the service is		
		counted according		
		to the number of its		
		provision		
		provision	Gender	
			Disease	
			Care category	
			Care type	
			Products	
			Providers	Providers which
				claimed health care
			Services	
			Time	Hospital admissions
				are associated with
				time periods accord-
				ing to dates of dis-
				charge. Time pe-
				riod of provision of
				health care

Table 1 – continued from previous pa	ige
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Cube	Fact	Meaning	Dimension	Comment
Utilization of medi-	Items utilized	Number of utilized	Age	Age at the time of
cal items		medical items ac-		provision health
		cording to submit-		care
		ted claims		
		If a medical item		
		was provided dur-		
		ing one visit/hospi		
		tal stay, the medical		
		item is counted ac-		
		cording to the num-		
		ber of its provision		
			Gender	
			Disease	•
			Care category	
			Care type	
			Products	
			Providers	Providers which claimed health care
			Items	
			Time	Hospital admissions
				are associated with
				time periods accord-
				ing to dates of dis-
				charge. Time pe-
				riod of provision of
				health care
Average utilization	Average utilization	= Services utilized /	Age	Age at the time of
of services per in-	of services per in-	Current insurees		provision health
suree	suree			care
			Gender	
			Disease	
			Products	
			Services	
			Time	Hospital admissions
				are associated with
				time periods accord-
				ing to dates of dis-
				charge. Time pe-
				riod of provision of
				health care
Average utilization	Average utilization	= Items utilized /	Age	
of medical items per	of medical items per	Current insurees		
insuree	insuree			
			Gender	
			Disease	
			Products	
			Items	
			Time	

Table 1 – continued from previous page

Table 9.5 Facts on of utilization health care

Facts on expenditures for health care

This group of facts relates to expenditures for health care actually paid to health care providers. Facts available are listed in *Table 9.6*

Cube	Fact	Meaning
Expenditure s for services	Service expenditure s	Expenditure s for service
		<u> </u>
Expenditure s for medical items	Item expenditure s	Expenditure s for medic
	'	
<u> </u>	'	
<u> </u>	′	<u> </u>
<u> </u>	'	<u> </u>
·	'	
·	· · · · · · · · · · · · · · · · · · ·	+
ſ		
Average expenditure s for services per insuree	Average expenditure s for services per insuree	= Service expenditure s
Average experimente s for services per insure	Average experimente s for services per mource	= Service expenditure 3
		+
		+
	· · · · · · · · · · · · · · · · · · ·	+
	·'	
Average expenditure s for medical items per insuree	Average expenditure s for medical items per insuree	= Item expenditure s/ N
	·	
- <u></u>	· · · · · · · · · · · · · · · · · · ·	
- <u></u>	+	
 I	+	
Average expenditure s for health care per insuree	Average expenditure s per insuree	= Average expenditure
		<u> </u>
		<u> </u>
	A	

Table 9.6 Facts on expenditures for health care

Facts on feedbacks

This group of facts relates to evaluation of request for feedbacks on provided health care that are issued by medical officers during processing of claims. Facts available are listed in Table 9.7

Cube	Fact	Meaning	Di-	Comment
			men-	
			sion	
Feed-	Feedbacks	Number of requests for feedbacks	Prod-	Insurance products that covered
back	sent	sent in a time period	ucts	claims initiating requests for feed-
details				backs
	Feedbacks re-	Number of feedbacks received in a	Providers Providers that submitted claims ini	
	sponded	time period		tiating requests for feedbacks
	Overall	Sum of all assessment overall assess-	Time	Period of sending/rec eiving feed-
	assessment	ment marks in responded feedbacks		backs
	Feedback re-	= Feedbacks responded/ Feedbacks		
	turn share	sent		
	Average	= Overall assessment/ Feedbacks re-		
	overall as-	sponded		
	sessment			
Feed-	Answers Yes	Count of all Yes answers	Prod-	Insurance products that covered
back			ucts	claims initiating requests for feed-
answers				backs
	Share of An-	= Answers Yes/ Feedbacks re-	Providers Providers that submitted claims ini	
	swers Yes	sponded		tiating requests for feedbacks
			Ques-	
			tions	
			Time	Period of sending/rec eiving feed-
				backs

Table 9.7 Facts on feedbacks

7.9.4 How access data from the Data Warehouse

Data from the Data Warehouse can be accessed by means of an Excel file. As access to the Data Warehouse is protected, a user has to get from an administrator of AR-MIS URL of the Data Warehouse for remote access, a userid and a password. A userid may allow access to all data in the Data Warehouse or only to a subset of data corresponding to a specific region, to selected regions, to a specific district or to selected districts.

The procedure of accessing of data is as follows (Image 274 - Accessing the Data Warehouse)

- 1. Open an Excel file
- 2. Click on the menu item Data
- 3. Click on the sub-menu From Other Sources
- 4. Click on the sub-menu From Analysis Services
- 5. A dialog box appears for specification of logon data:
 - (a) Enter URL of the Data Warehouse into the field Server Name
 - (b) Select the option Use the following user name and password
 - (c) Enter your userid into the field User Name
 - (d) Enter your password into the field Password
 - (e) Click on Finish
- 6. A box appears (Select Database and Tables) with the list of available cubes. Select one and click on Finish

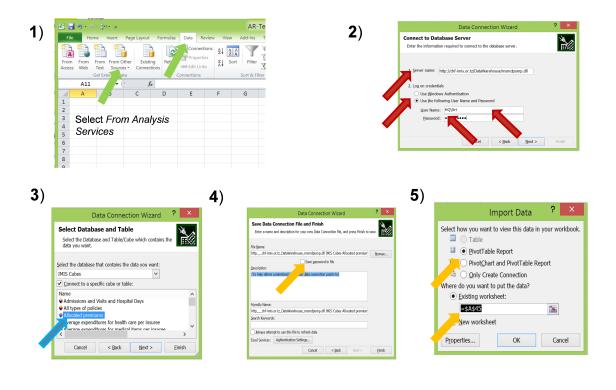


Fig. 264: Image 274 - Accessing the Data Warehouse

- 7. A box appears (Save Data Connection File and Finish). Check the box Save passport in file and click on Finish.
- 8. A box appears (**Import Data**). Select whether cube should be accessed by a pivot table and/or chart and specify a placement of the pivot table. Click on **OK**.
- 9. An area for the pivot table appears in the sheet with the **Pivot Table Field** area on the right (*Image 274 Accessing the Data Warehouse*). Click on facts to be displayed and click or drag dimensions to appropriate sectors of the pivot table in the **Pivot Table Field** area.

9

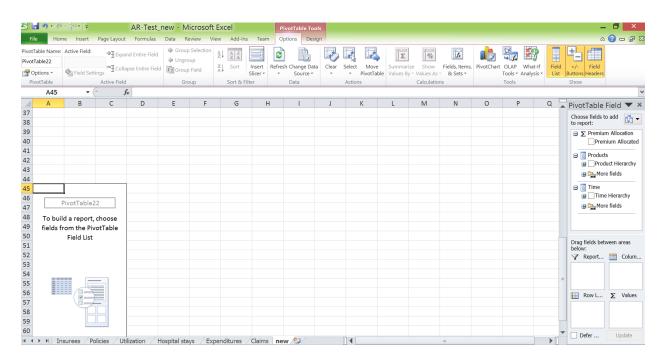


Fig. 265: Image 275 - Pivot Table in Excel