SOP: Ushauri Mobile App User guide

(Last updated: 17th Jul 2023)

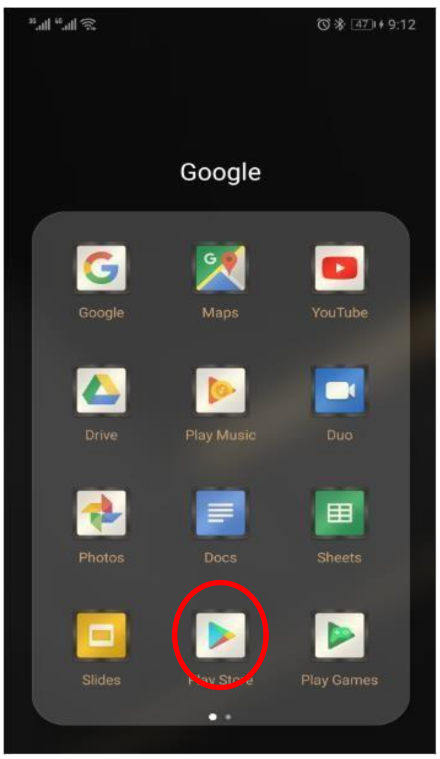
1 Downloading the Application

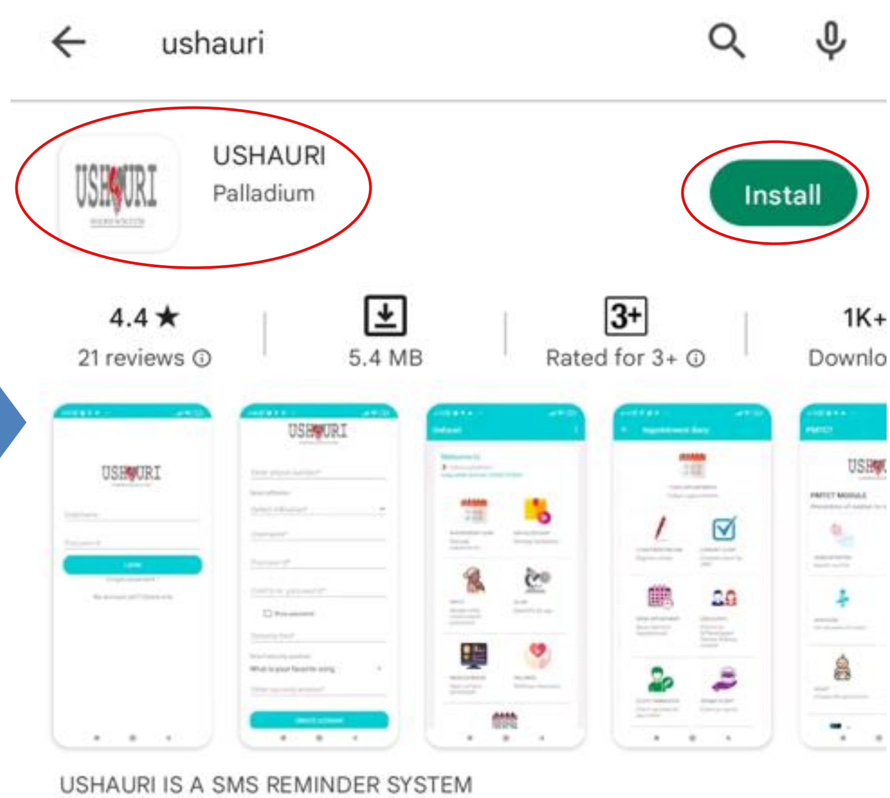
a. How to Download Ushauri

This Ushauri version can be found on the Google Play Store. Ensure that you do not have any previous versions on Ushauri on your phone.

To download this application, follow the following process:

Access the Google play store on your applications.
Search for **Ushauri**
Click on the **USHAURI** app icon found as highlighted below.
Click on install button to install it on your phone.





NB: This process will require you to use internet. *You must have uninstalled any other previous versions of Ushauri on your phone as well.*

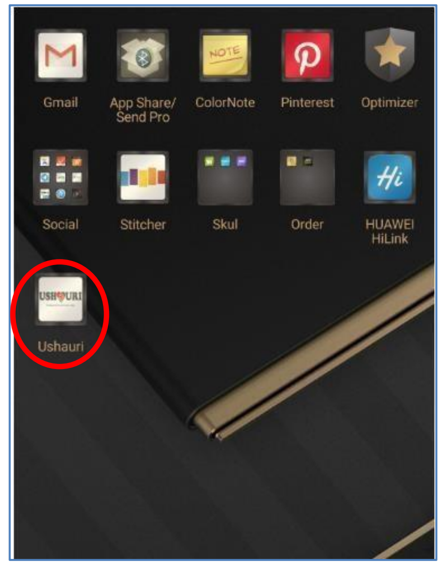
b. For existing installation

To correctly setup new version of Ushauri, you will need to uninstall the existing version and reinstall afresh.

b) How to Access the Ushauri Application

To access the Ushauri application from your phone, follow the following procedure:

Go to either your mobile device Home Page or All applications and locate the Ushauri Icon shown here →
Tap on the icon to launch the Ushauri application.



2 Creating a User Account

Facility enrolment assistant needs to download the application from the Google Play Store and create account and credentials to protect client information. Follow the following process to create your user account on Ushauri app:

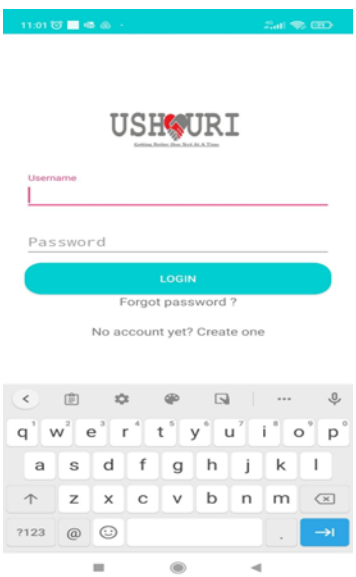
Access the Ushauri app.

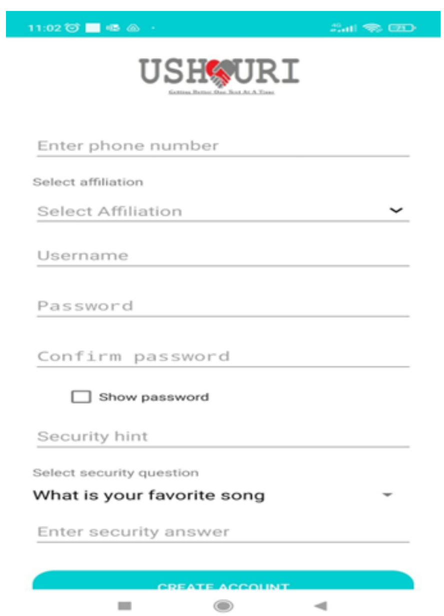
Click on the "**No account yet? Create one**"

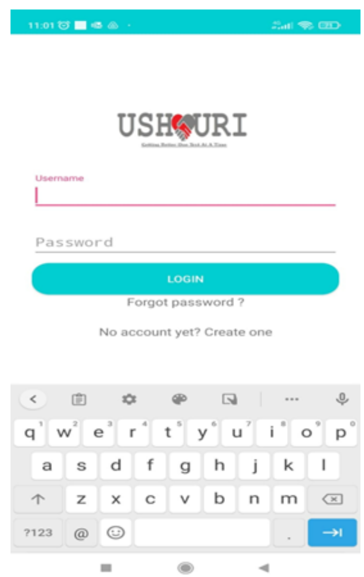
Input user details making sure to select your supporting partner on the Affiliations section

Click on "**Create Account**" once all details have been input as shown in the images below.

NB: Please ensure that you partner/ facility admin has added your phone No. to the system before creating an account





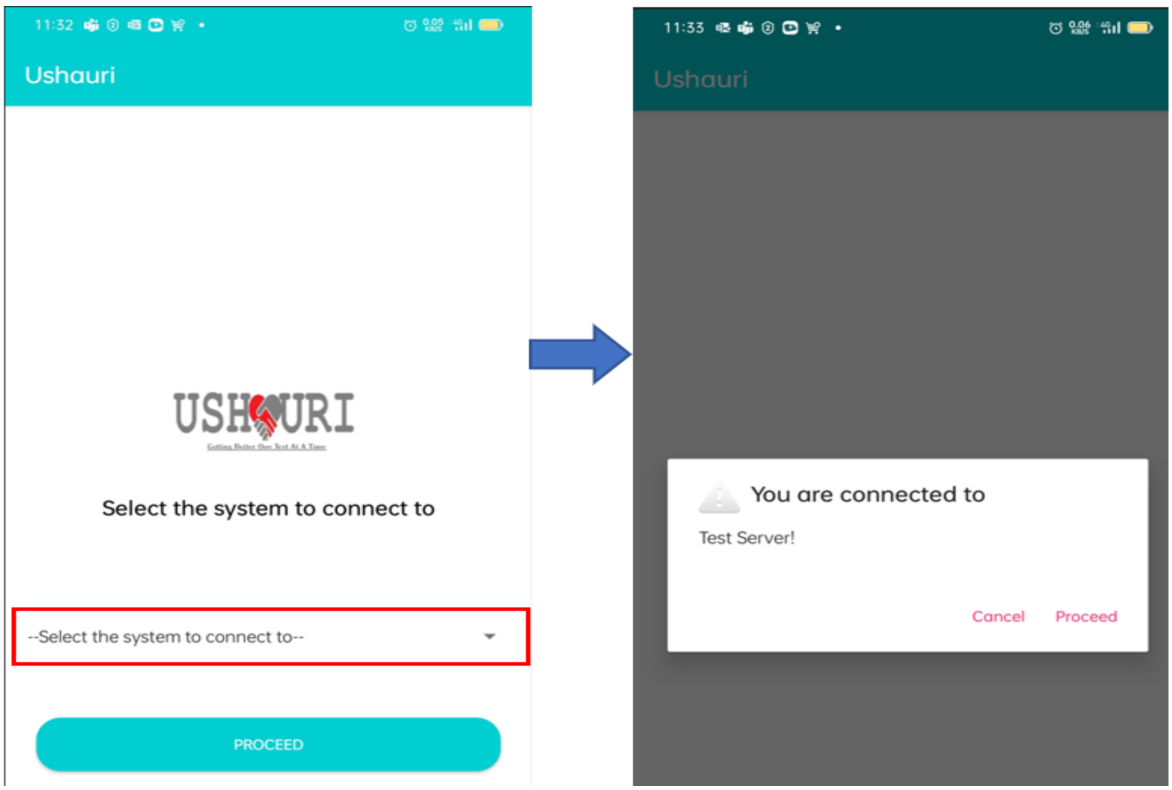


Once you have created the account, login by inputting your username and password then click the login button as shown above.

2.2.1 Switching Servers

There are two servers available during initial logging i.e. Production and Test. During the first-time setup, user MUST specify which server to login to as shown below. Tap on the drop down and choose the correct server.

Note that **Facility Live Server** is used for actual facility use and data captured into this sever are consider real patient, while Training Test Server is used strictly for testing or training purposes and data captured here is considered as dummy data.



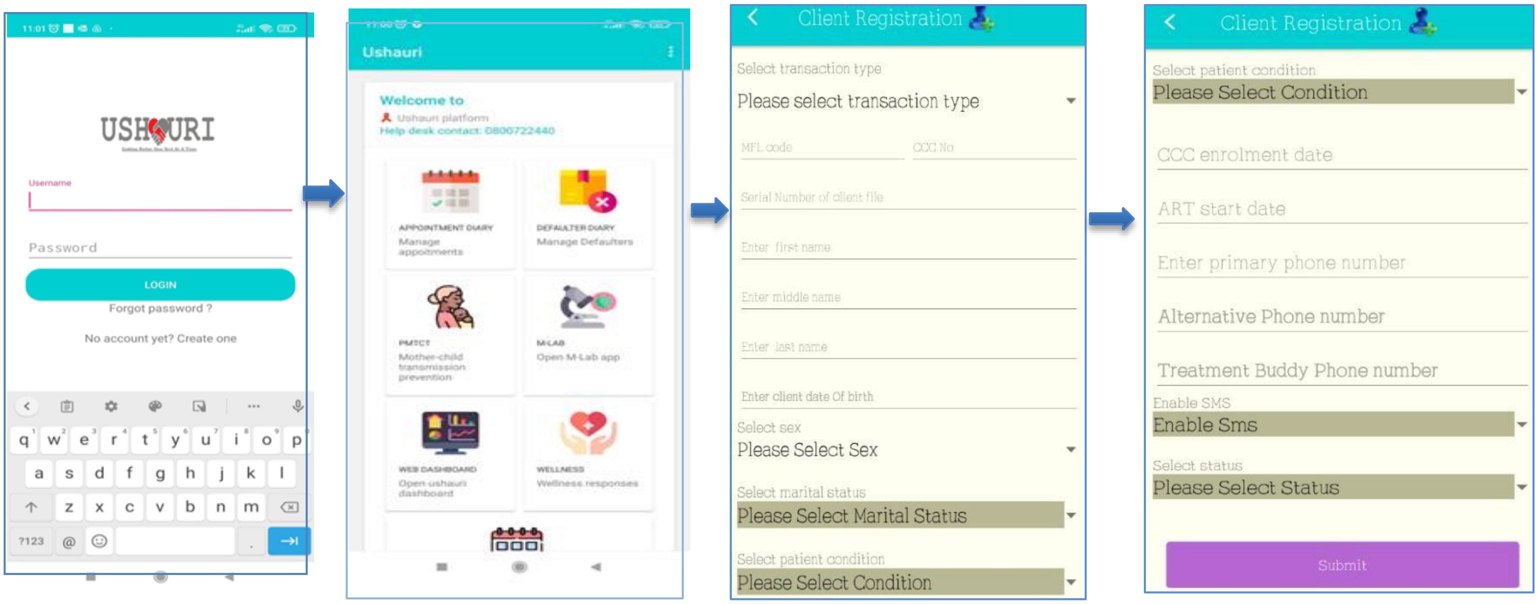
IMPORTANT: To switch between Production and Test server, you must uninstall the application and reinstall it afresh.

2.2 Create Client

To access the *Create new client* page, follow the following process:

Login to the Ushauri app
Click on the Appointment Diary button.
Click on the Create client icon . This should load the page that allows the clinician to input the various client demographics data.

Click Submit to save client data.



NB: For "Transaction Type" when registering a client:

New = *New Client,*
Update = *Updating any of the client details on registration page,*
Transfer client in = *Transfer in of a client from a facility that doesn't have Ushauri*

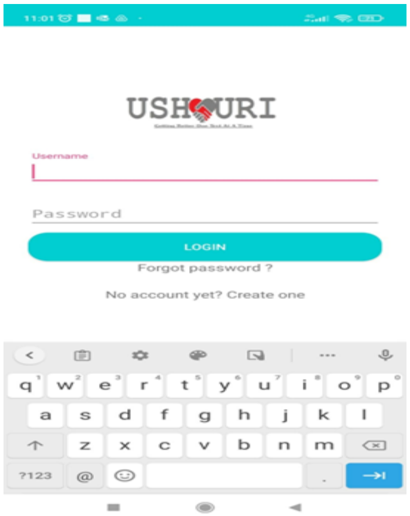
2.3 Appointment Management

a) View Today's Appointments

To view clients who have appointments today, follow the following process:

- Access the Ushauri mobile app and login.
- Click on **Appointment Diary** button.

NB: All today's appointments will be displayed on the appointment diary page.



b) Confirm Client Appointment

To confirm a client appointment, follow the following process:

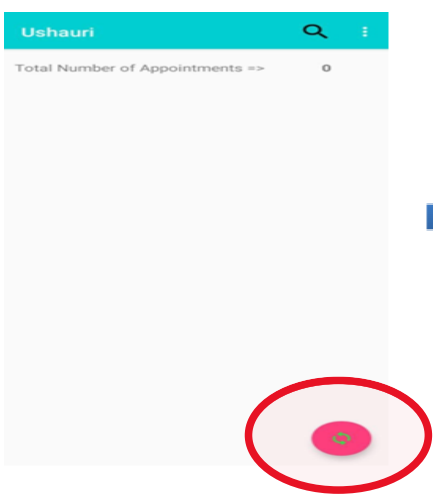
On client listing, search for client via their CCC No. or names

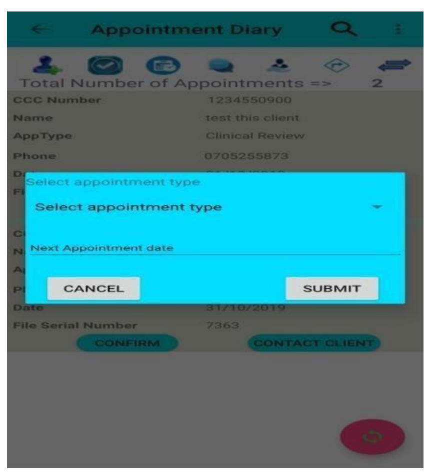
Click the red button to pull the appointment listing.

Click on Confirm next to the client details- once you click *Confirm* the client a new dialog box will open,

Select appointment type and Appointment date for the next appointment (TCA) visit.

Click Submit





NB: You can click *Contact client* if you'd like to call the client.

2.4 Missed and Defaulted Clients

a) Missed Appointments

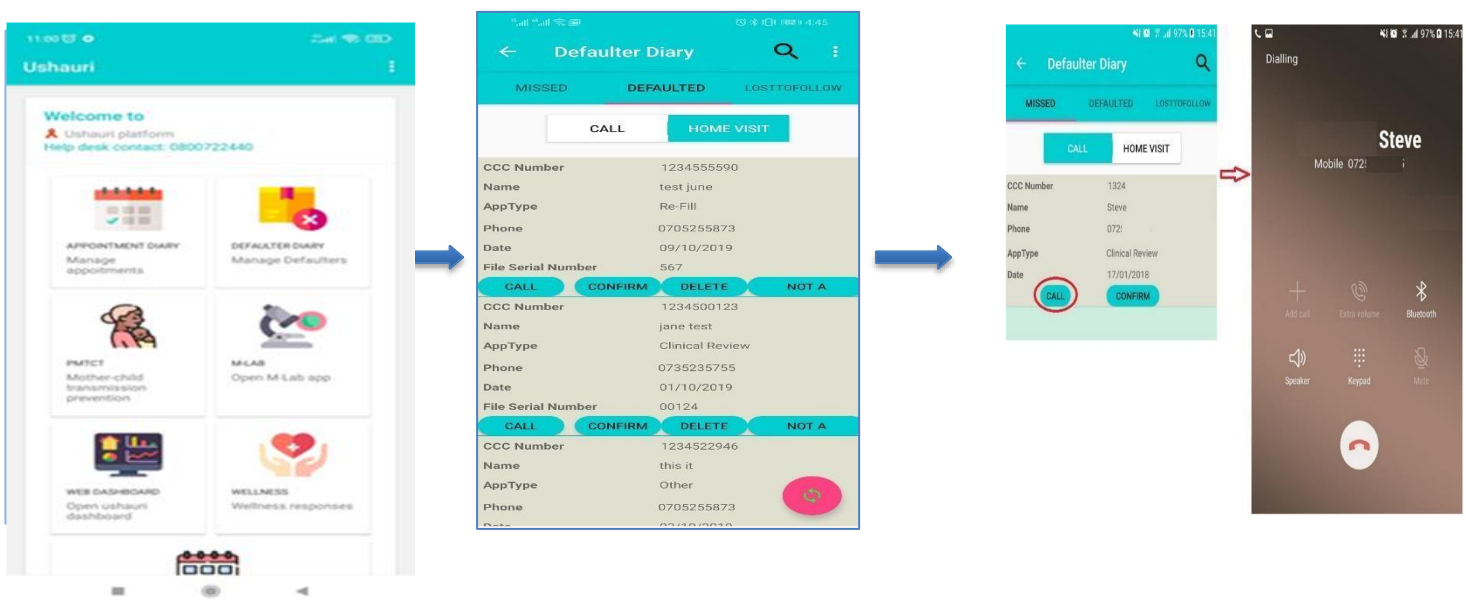
For missed appointments:

Click on ***Defaulter diary***- You can view all missed clients, lost to follow and defaulted clients.
Click on ***Missed*** to view all clients who failed to show up for their appointment.
Click on ***Call*** to call the client and trace them- The system will automatically call the client.

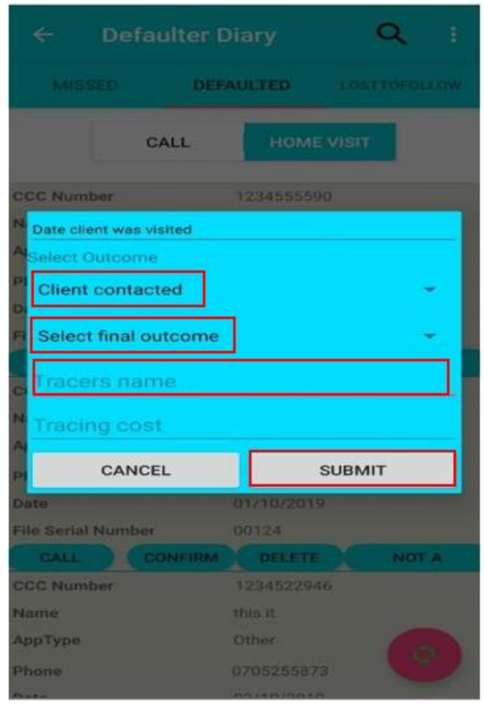
Click on ***Confirm*** to update tracing outcomes and/or update the client's next TCA.

b) Defaulted Clients

Click on ***Defaulter diary.***
On Defaulter diary, click on ***Defaulted*** to view all clients who have defaulted -3days post appointment date.
Click on ***Call*** to call the client and trace them- The system will automatically call the client.
Click on ***Confirm*** to update tracing outcomes and/or update the client's next TCA.



c) Tracing for defaulted client



To update tracing outcomes, **click** on the button next to the client you're updating.

Select whether *client was contacted.*

Select the *final outcome* of this tracing activity.

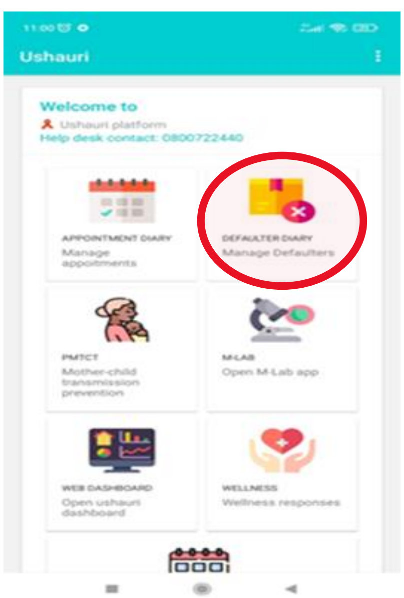
Input *tracer name* (the person tracing the client)

Click *Submit* button to update the tracing outcome.

d) Lost to Follow Up Clients

To update details for a lost to follow up client, follow the following procedure:

Click on ***Defaulter diary***
On Defaulter diary, click on ***Lost to Follow Up*** to view all clients who are lost on follow up – 90 days post appointment date.
Click on ***Contact Client*** to call the client and trace them- The system will automatically call the client.
Click on ***Confirm*** to update tracing outcomes and/or update the client's next TCA



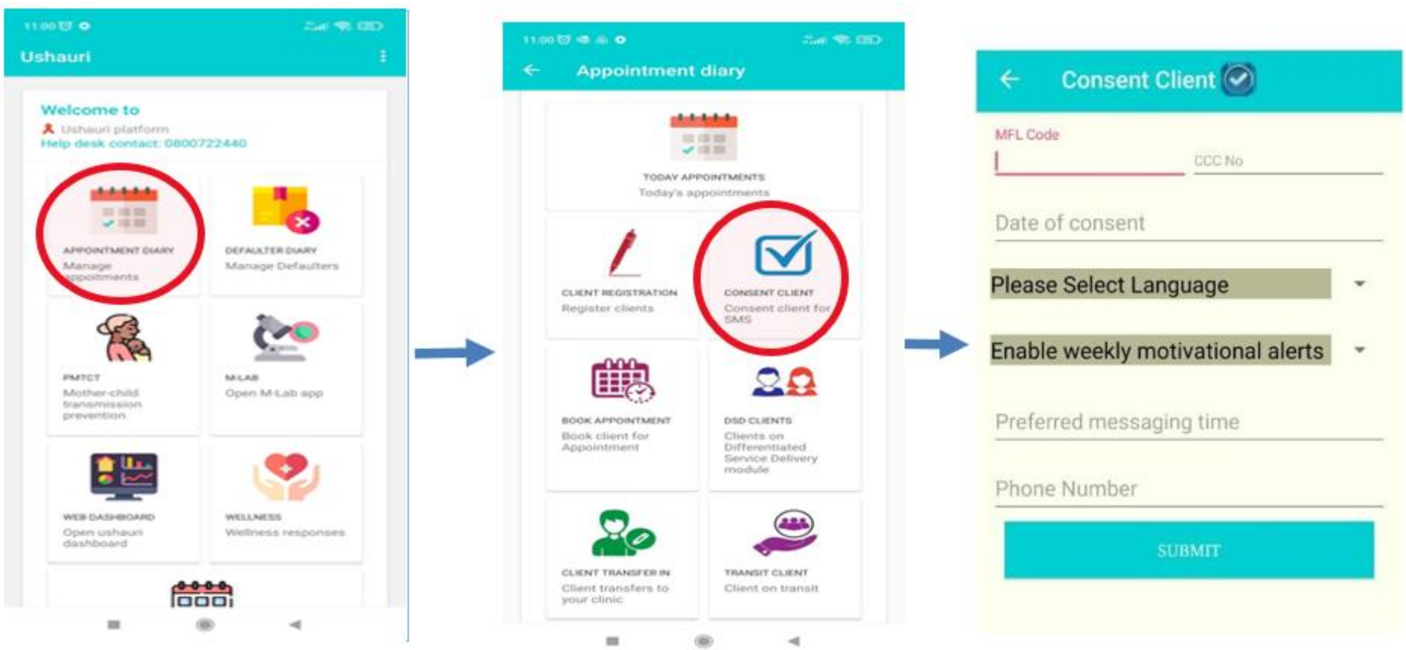
2.5 Consent a client.

Go to Appointment Diary > Click on Consent Client - Select icon highlighted as shown below

Input *10digit client CCC No*., *date of consent*, client *language preference*,

Select whether they want to *receive motivational alerts*, *preferred messaging time*, *phone No*. then click ***submit***.

Client should receive a message welcoming them to the Ushauri platform.



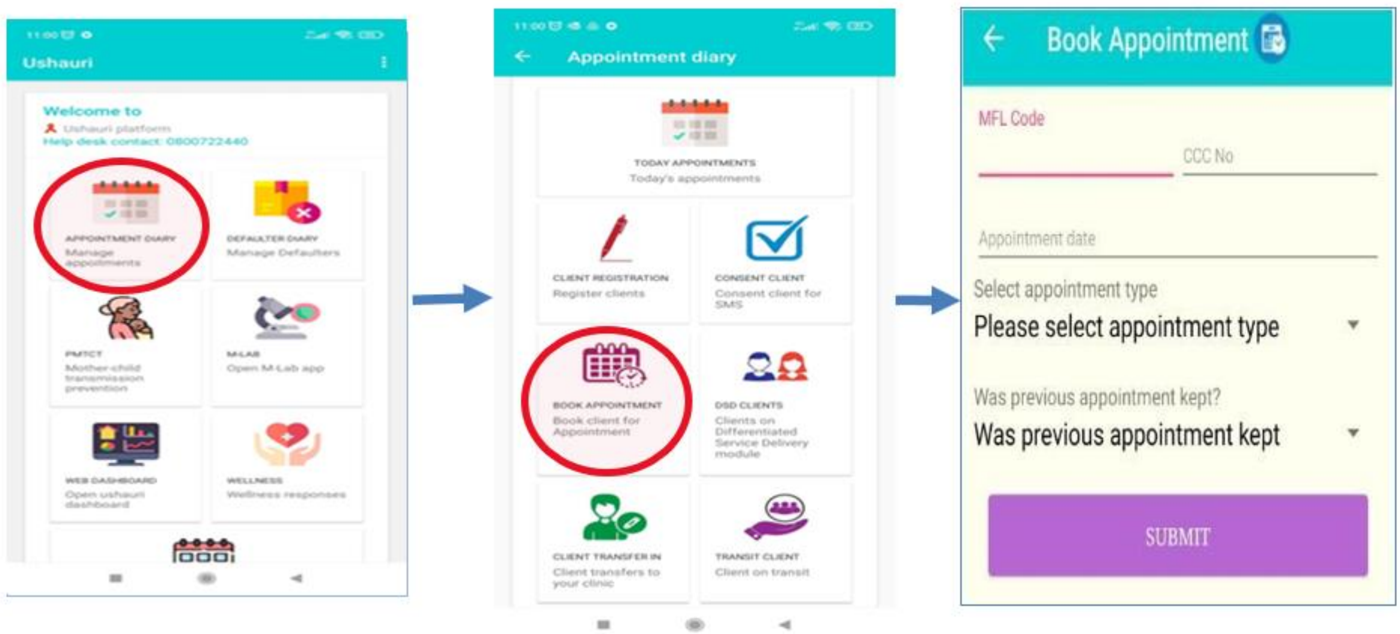
2.6 Book Appointment

For a new client, book their appointment from the appointment diary by:

Clicking on *appointment diary* > Click on *Book appointment* icon.

Input *10digit client CCC No*., *select appointment date* (next TCA), *select appointment type*, select whether *previous appointment was kept*. Click *Submit* to save and submit the appointment details.

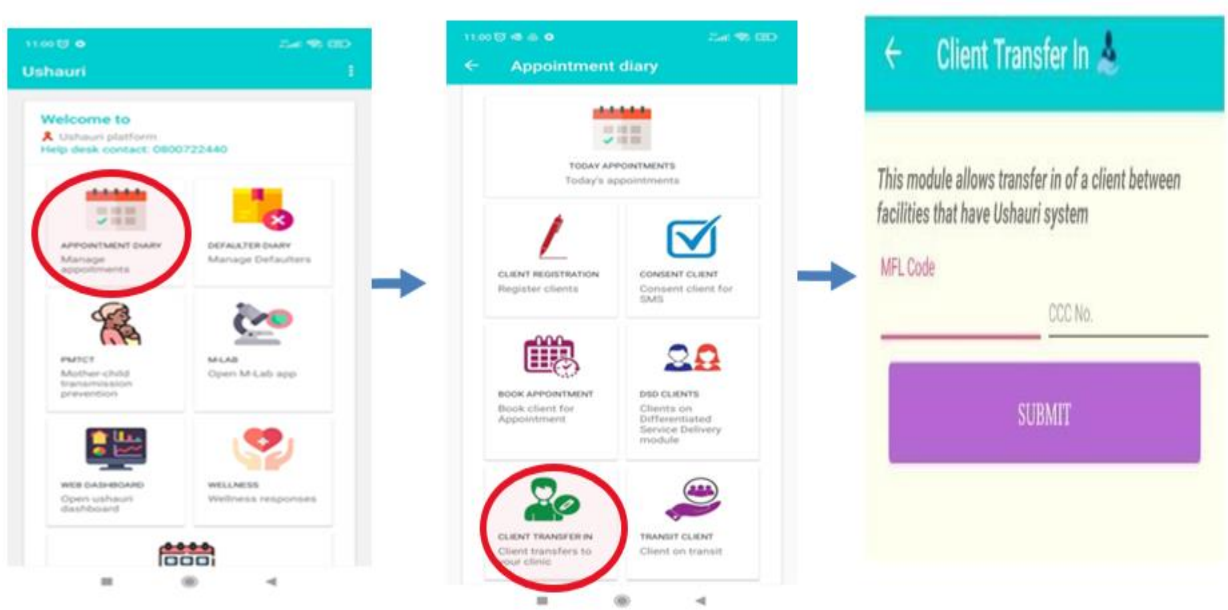
NB: Facility user should receive SMS on successful booking of a client appointment. Client should then receive SMS on appointment reminder 7days and 1 day to appointment.



2.7 Client Transfer in

This is for users in the Ushauri system but a different facility.
Go to *appointment diary* > click on *client transfer in* > input 10digit client CCC No.

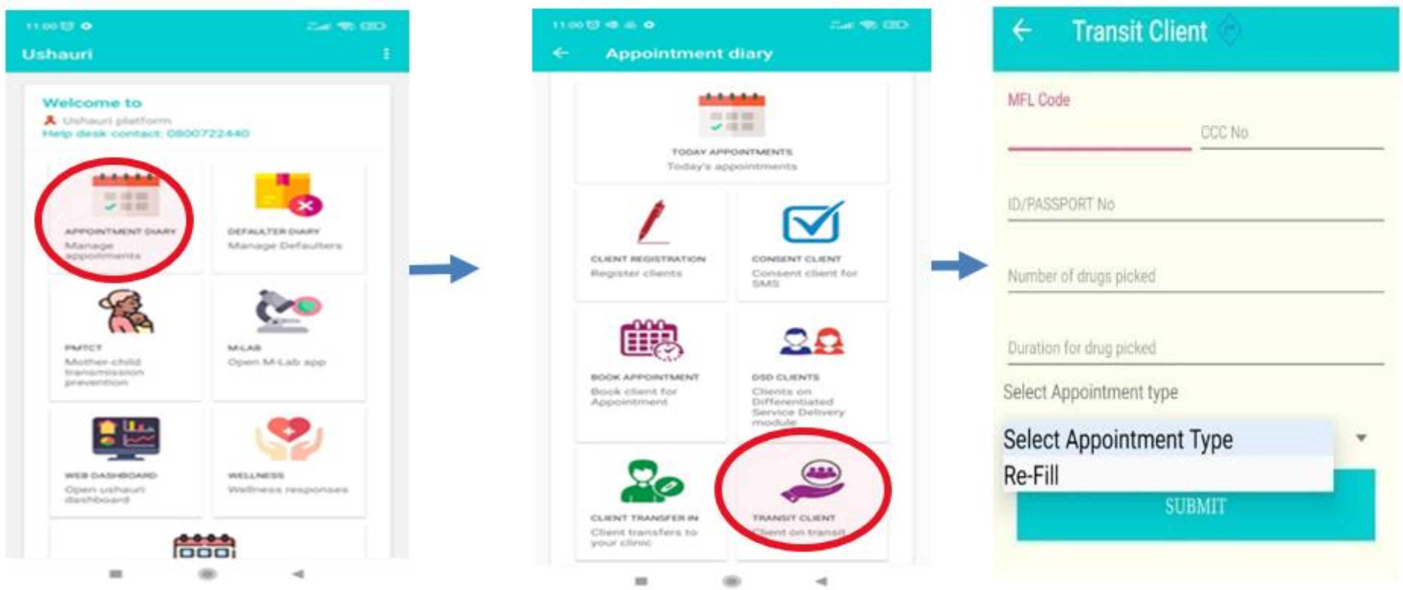
Click submit to pull client data to your facility.



2.8 Transit Client

To update a transit client, follow the following procedure:

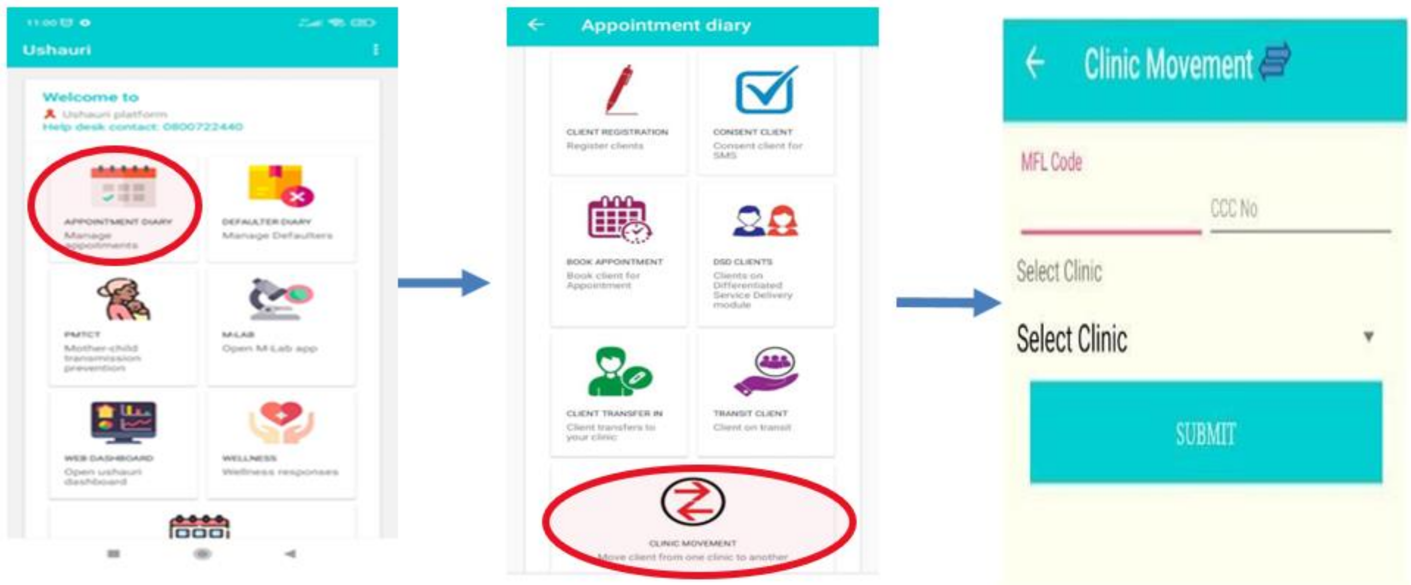
Go to *appointment diary* > click on *transit client* > input details on the transit client page as shown below > click Submit to save the details.



2.9 Clinic Movement

To move client from one clinic to the other within the same facility, follow the following procedure:
Go to *appointment diary* > click on the *clinic movement* as highlighted below > input *10digit client CCC No.*, *select clinic* the client is being moved to > *Submit.*

Client should be moved to the selected clinic for management.



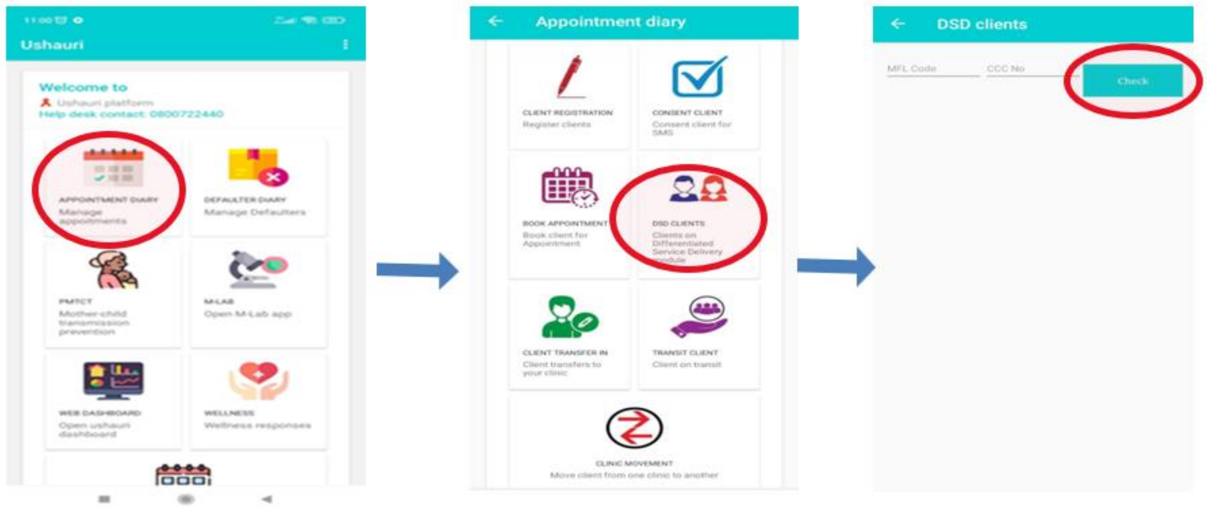
The Differentiated Service Delivery (DSD) module shall allow adding more than one appointment for a client at the same time in the system.

Follow the process below.

1) Login to the *Ushauri* app using correct credentials.
2) Access the *Appointment Diary* icon.
3) Click on *DSD client* icon.
4) Input client UPN on the *MFL* code and *CCC No*. fields and click on the *Check* button.
5) Select client stability (stable/unstable)
6) Select if client is on DSD.
7) Select if new or continuing DSD.
8) Select whether *facility based* or *community-based* DCM mode.
9) Select relevant options for facility model/community model.
10) If Facility-based DCM, select facility model.
11) If Community-based, select community model.
12) Select *Refill date* and *Clinical review date.*

13) Submit

NB: The two appointments will be created in the system for the client.



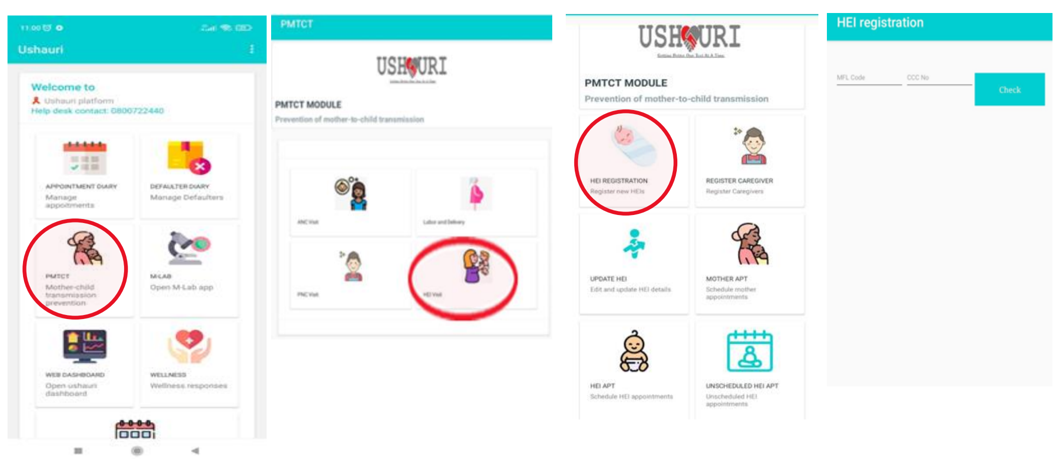
3.0 PMTCT Module

This module shall be used to manage PMTCT mothers, caregivers and the infants and the mother or child appointments.

3.1 HEI Registration

Follow the following process:

1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon.
3) Click on *HEI Visit*
4) Click on the *HEI registration* icon.
5) Input the ten-digit UPN of the mother (on the *MFL code and CCC No*. fields) and click *Check* button.
6) Select type of caregiver
6) Input *HEI number* allocated to the infant.
7) Fill in details of the infant such as *gender*, *date of birth*, *names*.
8) Click the *Submit* button once complete.



NB: A HEI will be created in the system and their details pushed to the server.

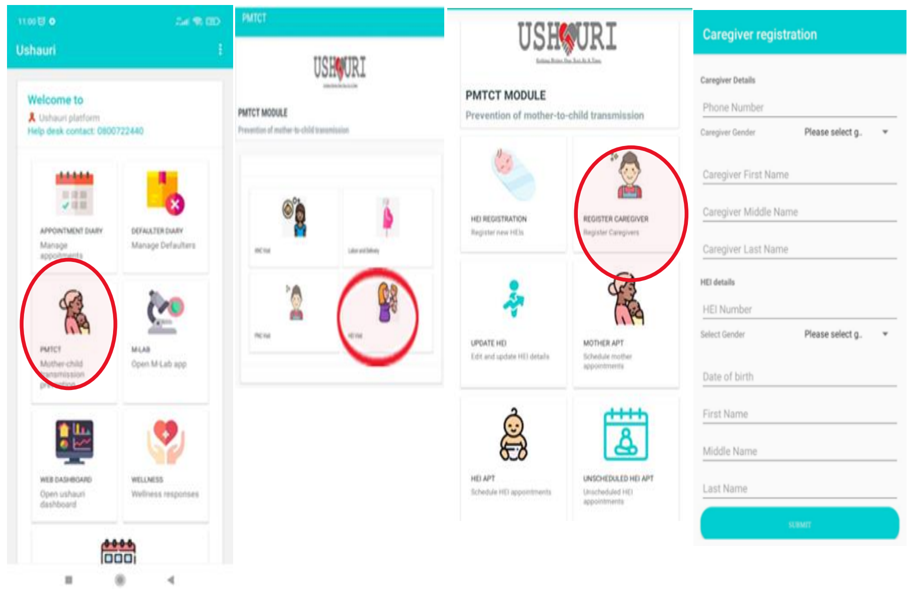
3.2 Caregiver Registration

This section will be used to register any caregiver of a HEI in the system.

Follow the following steps:

1) Login to the *Ushauri* application with your correct credentials
2) Click on *PMTCT* icon.
3) Click on *HEI Visit* icon.
4) Go to the *Register Caregiver* icon.
5) Input details of the caregiver such as phone No., gender, names,
6) Input HEI details such as HEI No., gender, date of birth, names.
6) Click on the Submit button to save details

NB: A caregiver will be created and attached to a HEI in the system.

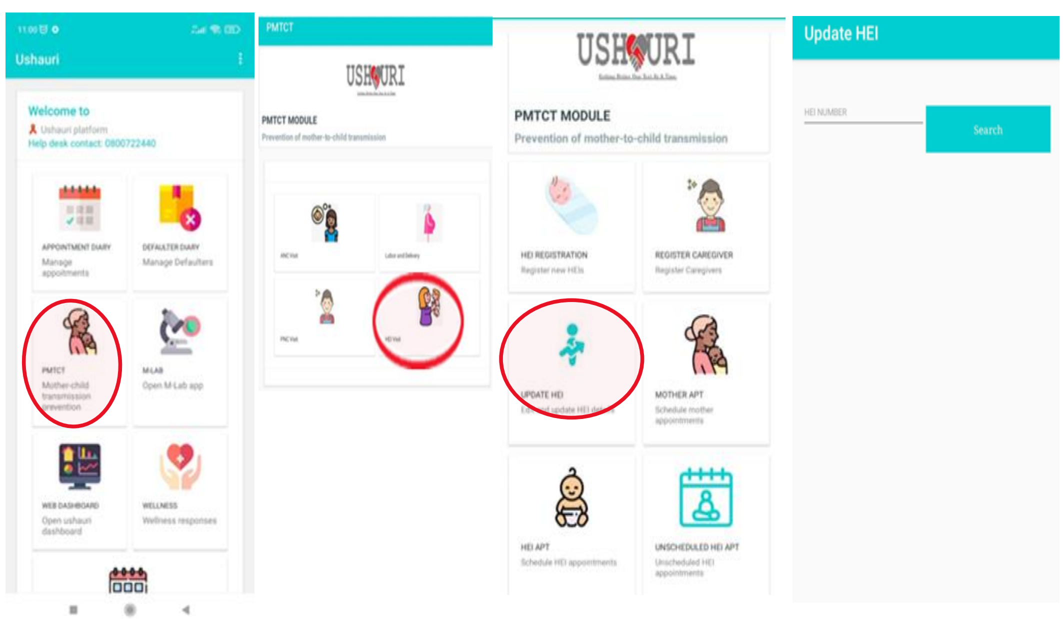


3.3 Update HEI

This page shall be used to update details of a HEI in the system.

Follow the process below:

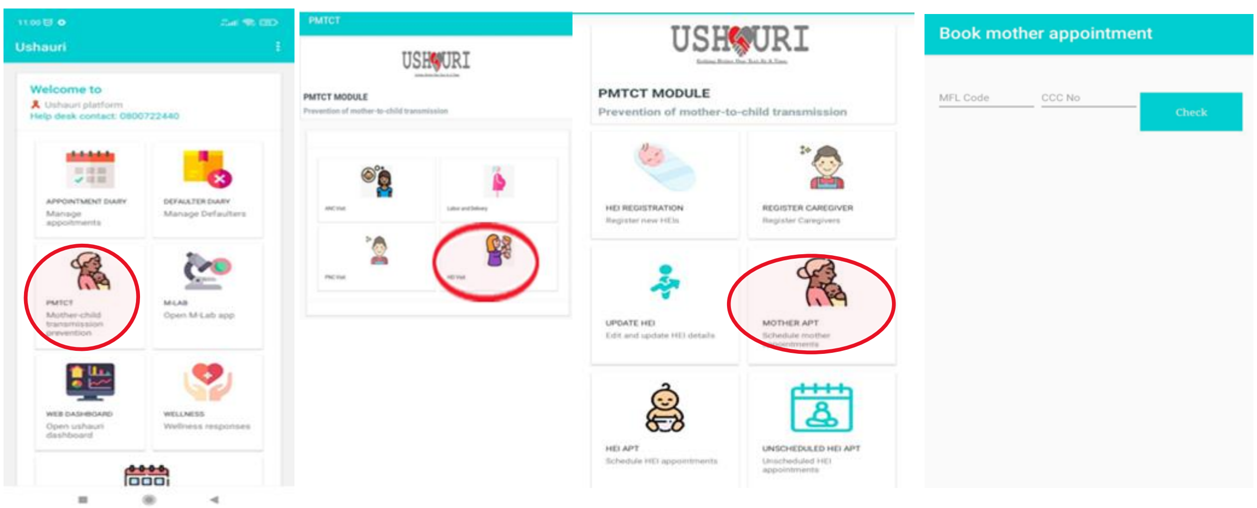
1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon.
3) Click on *HEI Visit* icon.
4) Click on the *Update HEI* icon.
5) Search HEI by their *HEI number*
6) Edit any of the details for the HEI and submit.



3.4 MOTHER Appointment

This page shall be used to create an appointment for a PMTCT mother. To do so, follow the process below:

1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon.
3) Click on *HEI Visit* icon.
4) Click on the *Mother APT* icon.
5) Input the ten-digit UPN of the mother in the *MFL code* and *CCC No.* fields and click Check.
6) Select *appointment date.*
7) Select *appointment type.*
8) Click *Submit* to save details of the mother's and HEI's appointment.

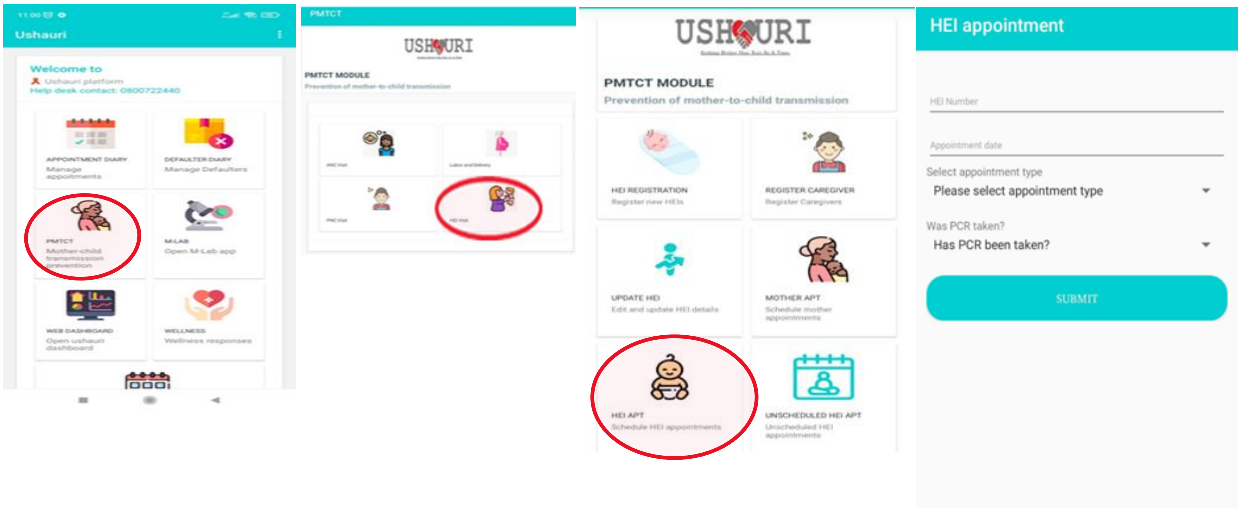


3.5 HEI APPOINTMENT

This page shall be used to create an appointment for a HEI. To do so, follow the process below:

1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon.
3) Click on *HEI Visit* icon.
4) Click on the *HEI APT* icon.
5) Input the *HEI number*.
6) Select *appointment date.*
7) Select *appointment type.*
8) Click *Submit* to save details.

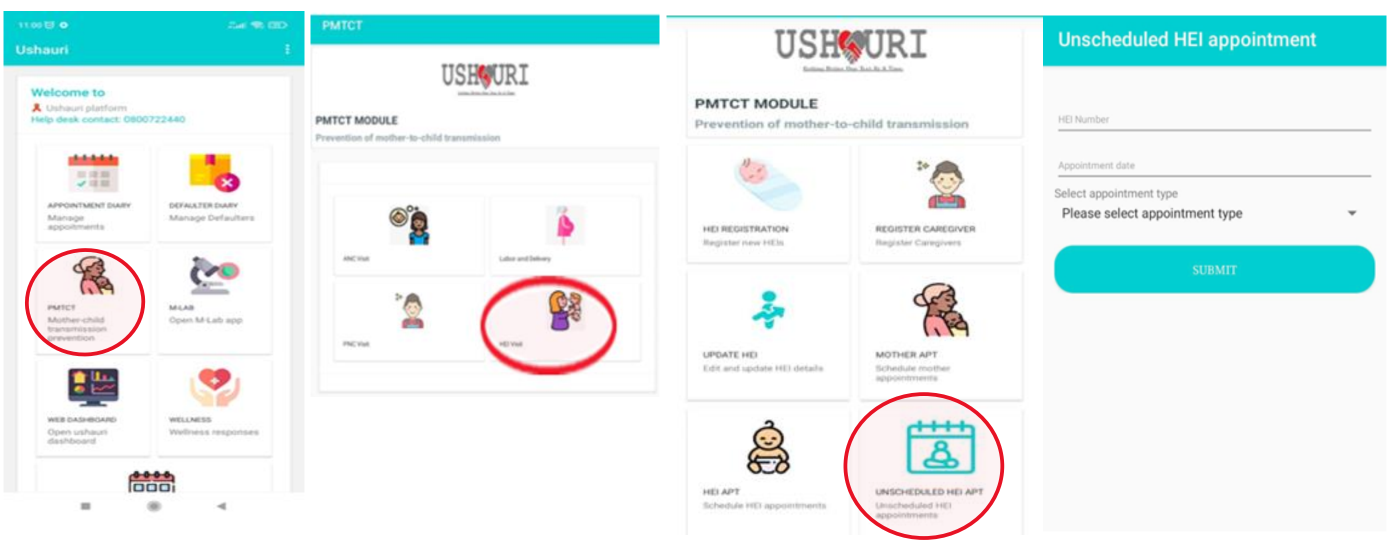
NB: A HEI appointment will be created in the system and an SMS reminder sent to the mother or the caregiver before the appointment date.



3.6 UNSCHEDULED HEI APT

This page shall be used to create an unscheduled appointment who has come to a facility without an appointment on the said date. To do so, follow the process below:

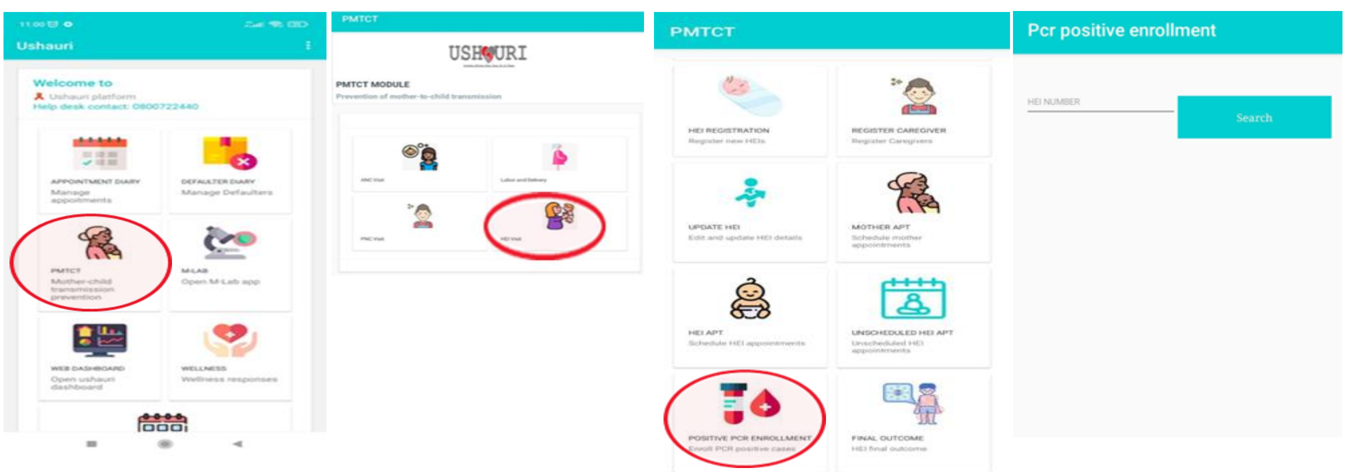
1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon.
3) Click on *HEI Visit* icon.
4) Click on the *Unscheduled HEI APT* icon
5) Input the *HEI number*.
6) Select *appointment date.*
7) Select *appointment type.*
8) Click *Submit* to save details.



3.7 POSITIVE PCR ENROLLMENT

This page shall be used to enrol positive PCR infants into the system. To do this, follow the process below:

1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon.
3) Click on *HEI Visit* icon.
4) Click on the *Positive PCR Enrolment* icon.
5) Input HEI number and search
6) Input HEI file number,
7) Select client status i.e. ART, On Care or Pre-ART
8) Input clinic number assigned.
9) Select enrolment date, ART date and D.O.B
10) Select message status for motivational messages and submit once done.



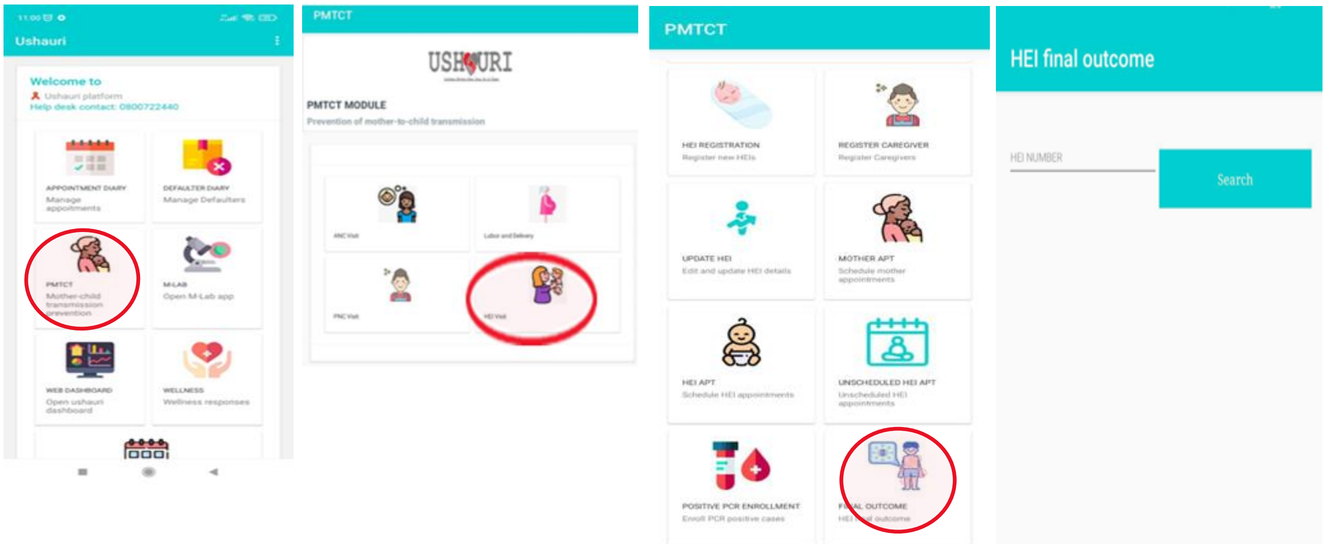
3.8 Final Outcome

This page is used to record the final outcomes of HEI registered in the system. To do this process, follow the process below:

1) Login to the *Ushauri* application with your correct credentials
2) Click on the *PMTCT* icon
3) Click on *HEI Vist* icon
4) Click on the *Final Outcome* icon
5) Input HEI number and search

5) Select final outcome of the HEI i.e. Dead, LTFU or TO(transfer out)

6) Submit the details of the final outcome

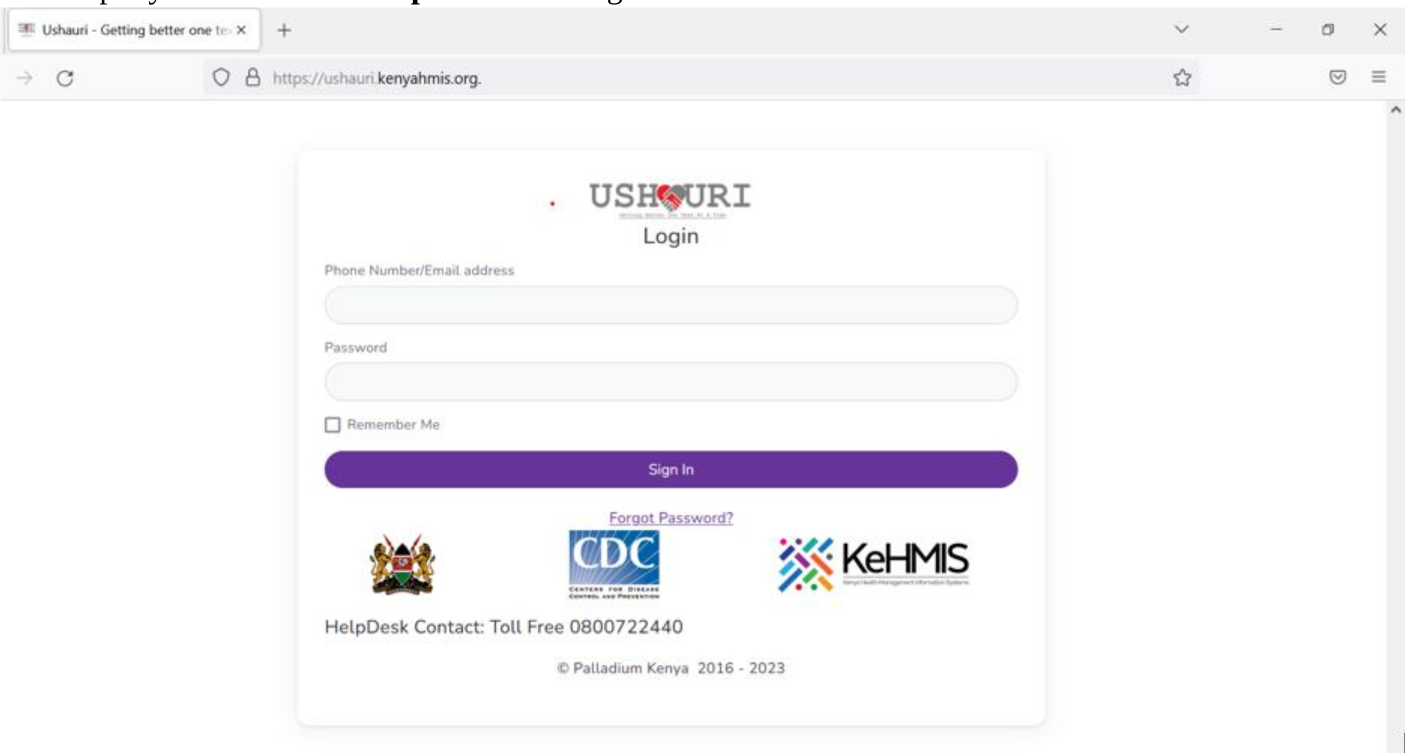


4.0 WEB DASHBOARD

4.1 How to Login in the System

To access the web dashboard, type in the following link on your browser: https://ushauri.kenyahmis.org.

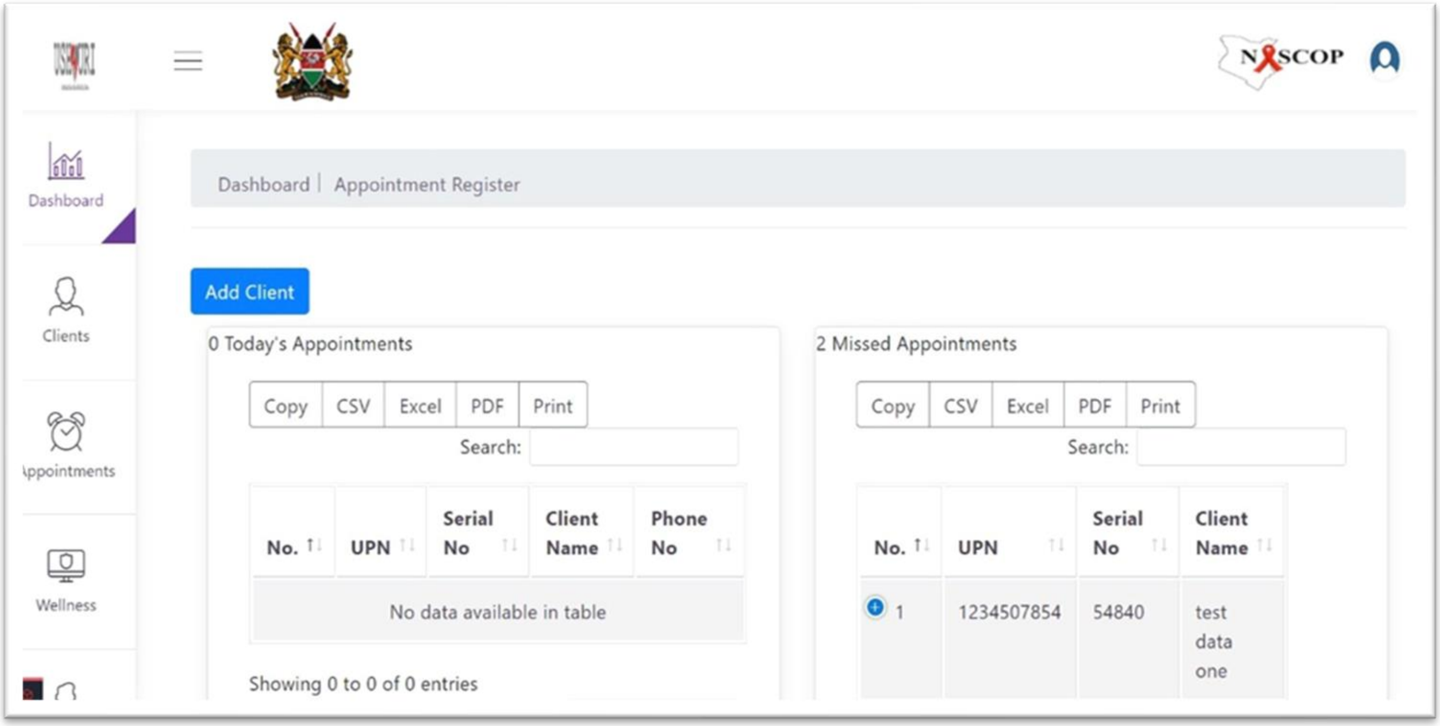
Input your **username** and **password** to log in



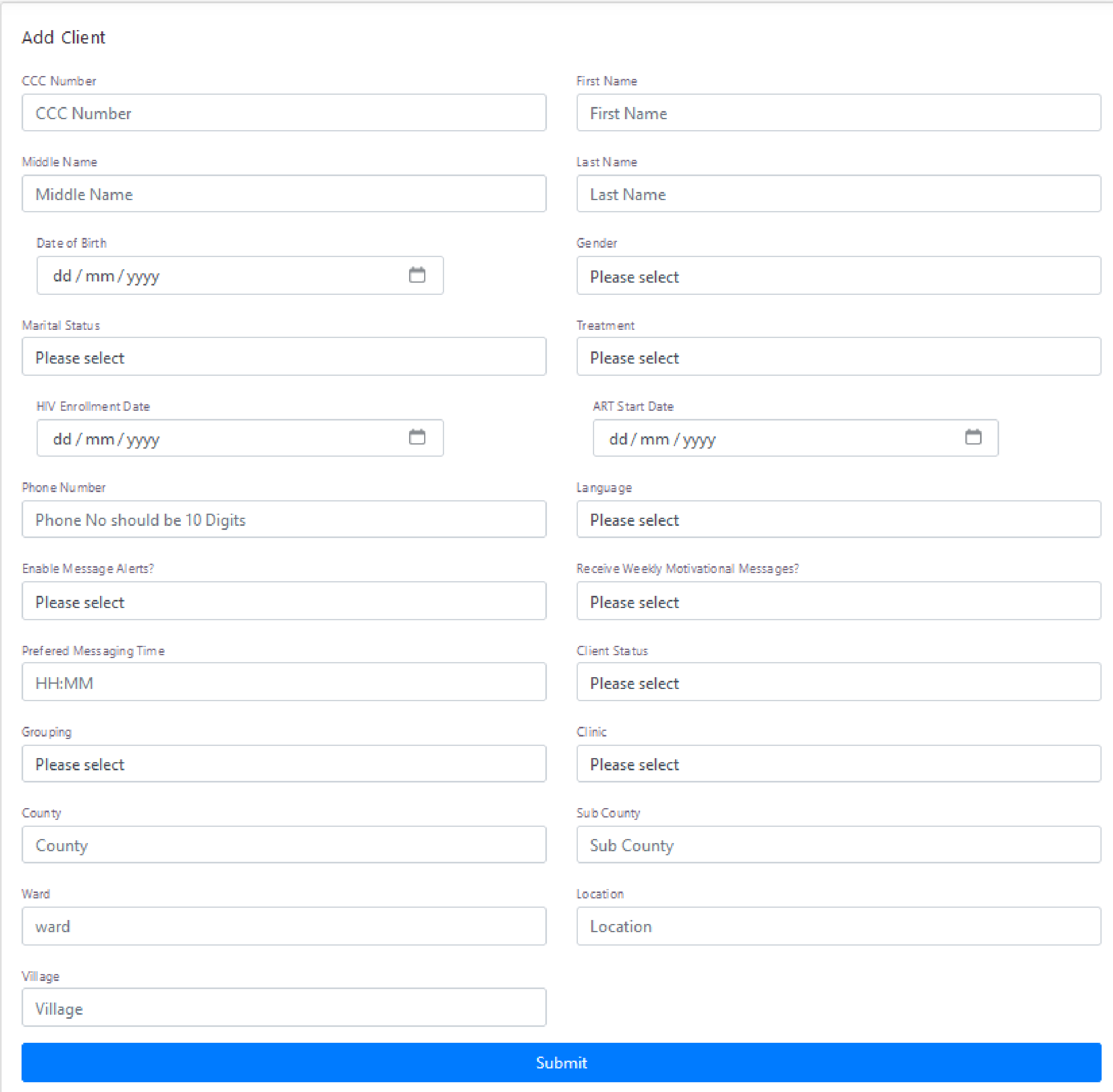
4.2 How to register or add a client into the system

Click on the Appointment Register button on the dashboard.

Click on *Add Client*



Fill in the client details on the form and click submit as shown below:



Add Client

CCC Number: CCC Number

First Name: First Name

Middle Name: Middle Name

Last Name: Last Name

Date of Birth: dd / mm / yyyy

Gender: Please select

Marital Status: Please select

Treatment: Please select

HIV Enrollment Date: dd / mm / yyyy

ART Start Date: dd / mm / yyyy

Phone Number: Phone No should be 10 Digits

Language: Please select

Enable Message Alerts?: Please select

Receive Weekly Motivational Messages?: Please select

Prefered Messaging Time: HH:MM

Client Status: Please select

Grouping: Please select

Clinic: Please select

County: County

Sub County: Sub County

Ward: ward

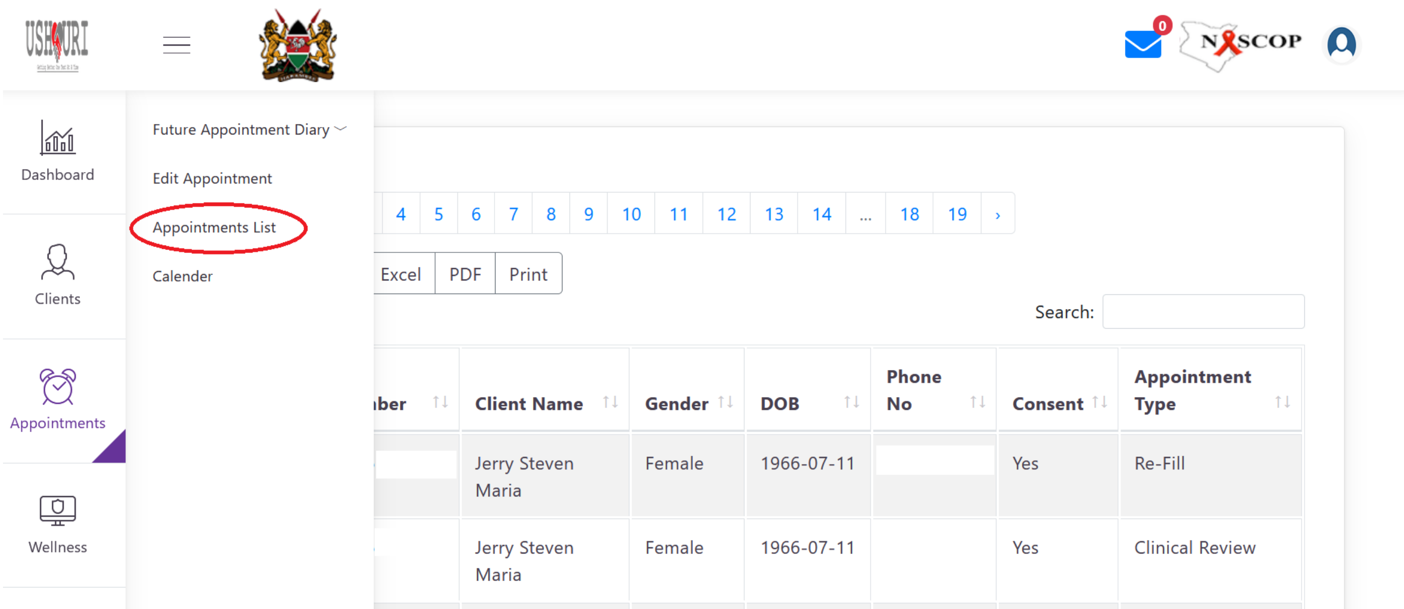
Location: Location

Village: Village

Submit

4.3 How to view all appointments

On the dashboard click appointments > Appointment List

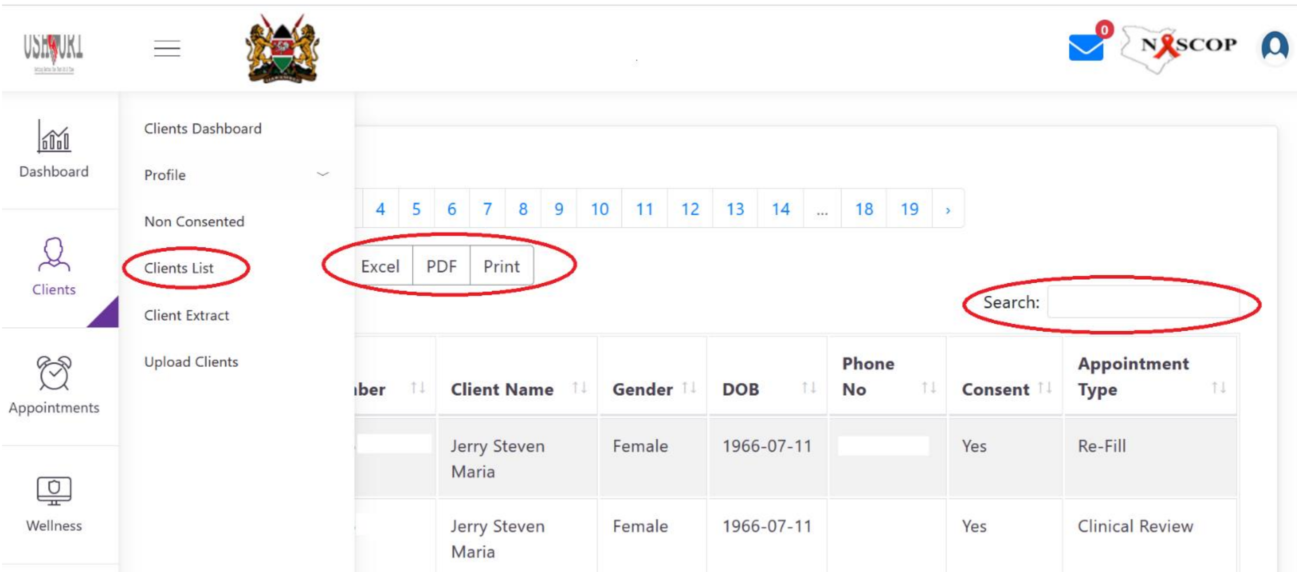


You can search a client who has honored his/her appointment in today appointment and edit information i.e. next appointment date.

Note: You can also search missed client, defaulted clients and lost to follow client and edit the feedback information you have got from them.

4.4 How to View all clients in the system

On the left side of the



dashboard click on **Clients**

On the menu that appears, click on clients list. A list of all clients in the system will be displayed on the right. You can also search clients using the UPN number, Name or Phone number. Click on a client that you want to edit or change any information.

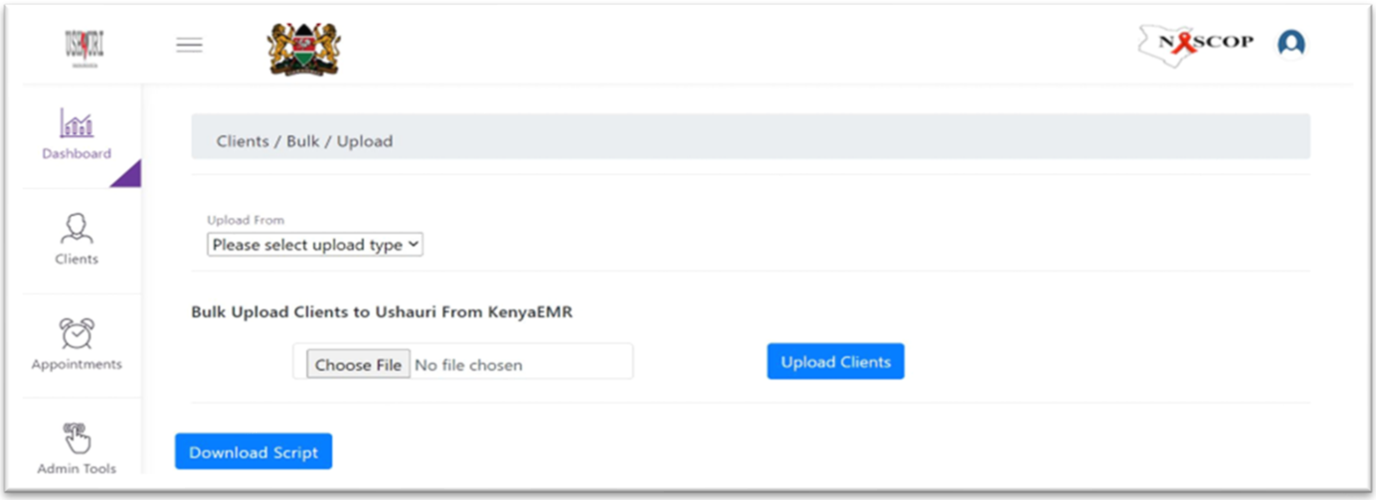
Note: You can export details on this page for further analysis in the excel, PDF or CSV format from this level.

Client Upload Module

Comprises of two categories:

From KenyaEMR data extracted through a downloadable script

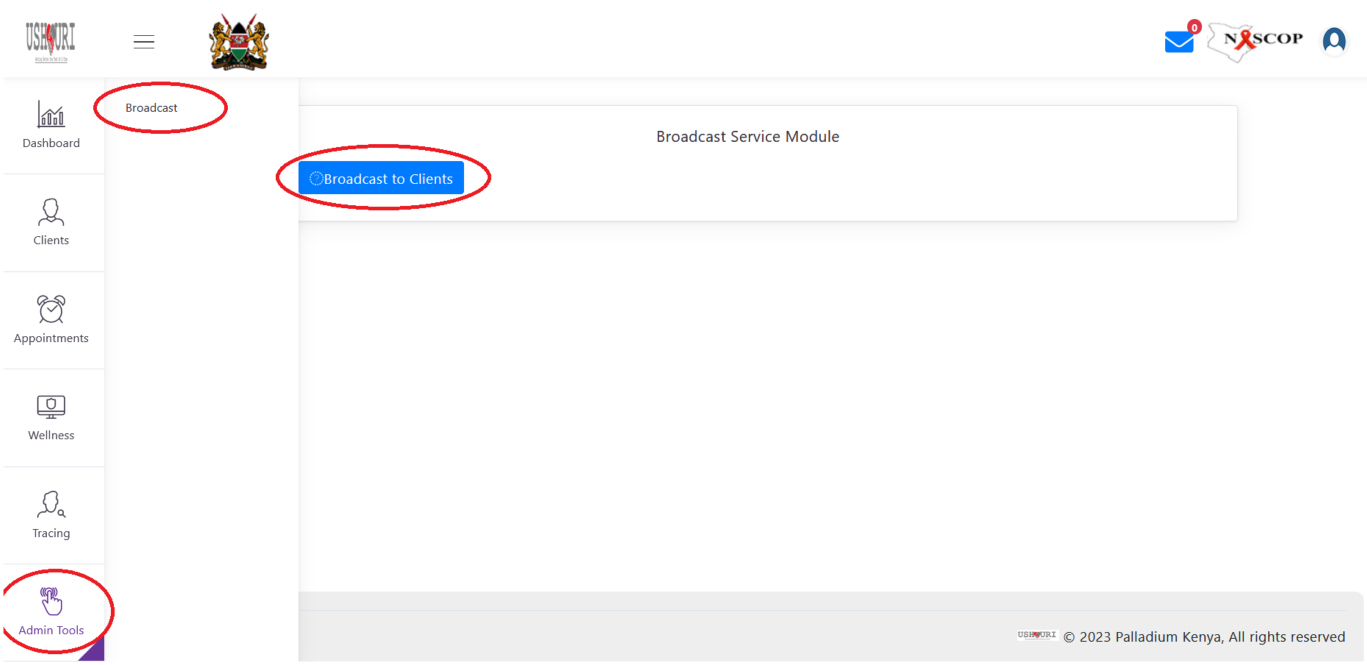
Through Template format provided with attached downloadable template



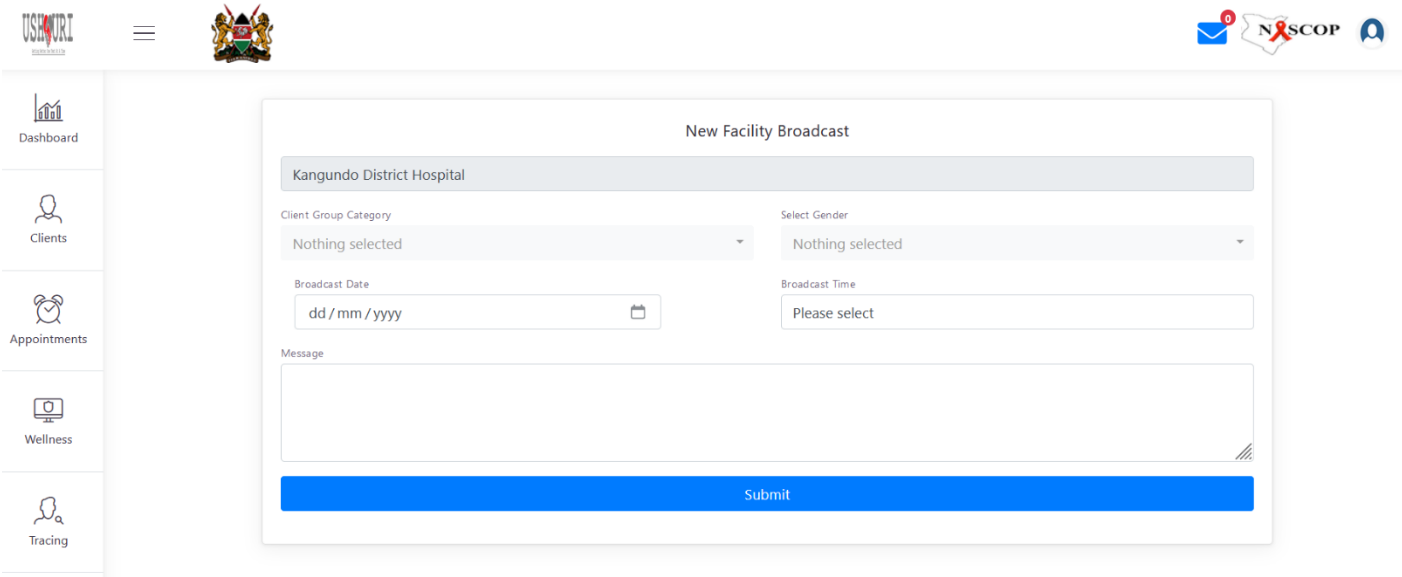
4.5 How to set broadcast messages

On the left side of the dashboard click on *Admin Tools* > a menu will appear, click on *broadcast*

Select ***Broadcast to Clients***



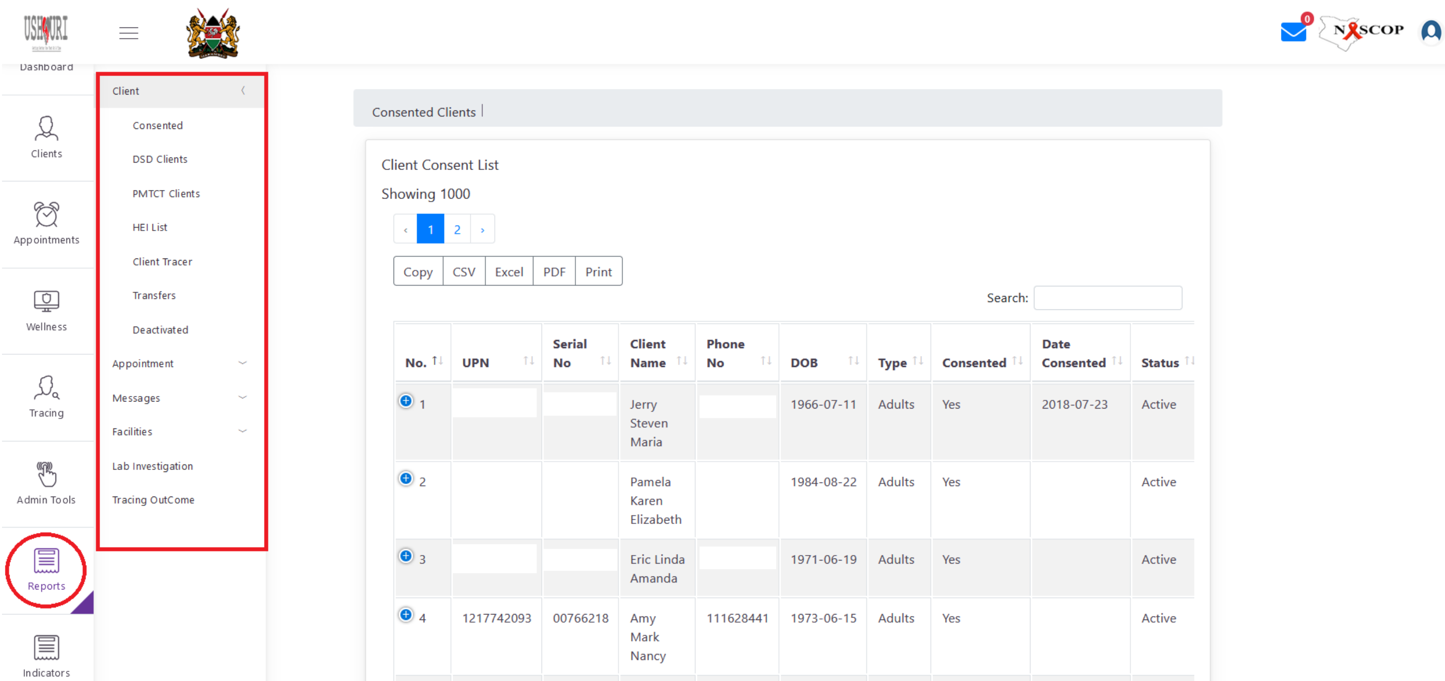
For clients broadcast, add all the details of the broadcast that you want to send and click *Submit* as shown on the image below.



Note: Use drop down menu to select Client Group Category, Gender, and Broadcast Time. Use date picker for the broadcast date.

4.6 How to view reports

To access the reports section, on the left-hand side of the dashboard, click on Report. A menu will pop up containing all the report types accessible.   Select any of the reports to view.



THE END