

mHMtaani Guide For Supervisors & Trainers



“Using mobile phones to promote healthier communities.”



Acknowledgements

mHMtaani or “*Mobile health for our communities*” is a made possible through a collaboration between APHIAplus, USAID, The Kenya Ministry of Health, Pathfinder International, and Dimagi, Inc.



mHMtaani Project Statement

mHMtaani or “*Mobile health for our communities*” aims to promote healthier communities by using a CommCare mobile phone application to monitor and track the health of pregnant mothers, as well as orphans and vulnerable children (OVCs). The project seeks to empower Community Health Workers (CHWs) with easy to use technology in order to provide higher quality, accountable, and transparent health services. It also provides supervisors and trainers to CHWs to facilitate the flow and integration of information back to the community.

1 June 2013

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Goals:

- Understand basic mobile phone and CommCare operations
- Understand Pregnant Mother and Orphans (OVCs) module and forms
- Successfully be able to train CHWs on using CommCare
- Manage CHWs on CommCare HQ
- Use reports for monitoring CHWs
- Export data into excel spreadsheets

1. Training Checklist
2. Training Schedule
3. CommCare Overview
4. Application Overview
 - a) Pregnant Mothers
 - b) Orphans (OVCs)
5. Deploying an application on a Phone
6. CommCare HQ (website) Overview
 - a) Setting-up users
 - b) Managing Groups
 - c) Managing Web users
 - d) Reports
 - e) Data Exports
7. Common CommCare Terms
8. Basic Troubleshooting

1. Pre-Training Checklists



At least ***ONE WEEK BEFORE*** training, please make sure all of the items have been prepared:

- Planning**
 - “Intent of training” document has been sent to Technical Working Group
 - Ministry of Health, CHEWs, and in-charge of facility have been notified and sent “Intent of training” document
 - List of 25 CHWs to be trained with National ID numbers has been submitted to Technical Working Group in excel spreadsheet
 - Spelling of names and IDs has been double checked
- Training space**
 - Enough tables and chairs
 - Projector and power supply
 - Lunch / Tea planned for
 - Markers and Flip chart
- A phone for each CHW**
 - Phones are charged
 - They have been branded (on the back) and labeled (on the inside of the cover with CU and #, ex. Kangemi 1, Kangemi 2 etc.)
 - Have *registered* SIM cards inserted
 - SIM cards are loaded with data
 - Each phone has an SD card
- Username and passwords have been created for all CHWs on CommCareHQ**
 - Username is firstinitial.lastname (ex. a.fletcher)
 - Password is the last 4 numbers of their national ID (ex. 1234)
 - Phone number assigned and added on CommCareHQ
 - Each user has been assigned a group, groups are named by Community Unit (CU)
- Application has been installed on EVERY phone**
 - Date and time are correct on phone
 - Multimedia folder
 - .jar and .jad files
 - Application settings set for CommCare (under options)
 - Username restored
 - Shortcut set on phone
- Materials have been printed**
 - Sign in sheet
 - Name tags
 - Spreadsheet of all CHWs, their usernames and passwords
 - Contract for each CHW
 - CHW survey for each CHW
 - CHW manual for each CHW
 - Trainer guide for each trainer
 - Certificate of training completion for each CHW

1. Post-Training Checklists



Within at least **ONE WEEK AFTER** training, please make sure all of the items have been prepared:

- Report given back to Technical Working Group**
 - How many CHWs trained
 - Dates and times of training
 - Final spreadsheet of names, national ID, usernames, passwords, phone IMEI code, phone number, and mHMTanni number
- Reports**
 - You have created favorite reports for each CU trained
 - Scheduled weekly email report of submissions by form
 - Scheduled monthly email report of case activity
 - Monthly case activity has been sent via email for CHEW

Training Tips & Tricks

- **Establish a phrase in the beginning to get everyone's attention**
 - *Example:*, when the trainer says “MHMTAANI!!” Everyone raises their hands in response and replies “Yes we are together!” Now that you have their attention and their phones are down you can continue.
- **Use an icebreaker to get everyone moving around and engaged**
 - *Example:* Each person says their name, and acts out what they typical use mobile phones, or why they like being a CHW.
- **Use common examples and analogies**
 - MPESA is a great example for explaining how information is stored and sent in CommCare.
- **Use role-playing to demonstrate interactions with clients**
 - On Day 2 have pairs of CHWs come to the front of the room and demonstrate how their home visits went, what can go wrong in visits, and what an ideal visit looks like. Use this to show them how to use the phone to interact, how to talk to the client about using the phone, and what NOT to do with the phone during visits. Example Role-playing activities:
 - *How did you do your home visit? Come up front and show us!*
 - *What scenarios happen that are difficult?*
 - *What does an ideal home visit look like?*
- **Pair up CHWs**
 - Usually older CHWs struggle with learning how to use phones (but not always!) and younger CHWs pick it up quickly. Go ahead and pair them up to help each other during training.



2. Training Schedule

Overview:

- Each person will be required to attend 2 days of training before they are certified as a CommCare supervisor and trainer
- Day 3 is set aside for setting up phones for trainings and helping everyone prepare

DAY 1

Session	Activity	Goal	Estimated Time
1	CHW training	Run through CHW Training (see CHW manual and training timeline)	All day

DAY 2

Session	Activity	Goal	Estimated Time
1	Review of training & Overview	Gather feedback and go through preparations for training	1 hour
2	Deploying an Application	Learn how to put an application on a phone	1 hour
3	Setting up users	Set up and manage both mobile and web users	30 minutes
4	Reports	Understand monitoring reports, be able to build a custom export, and send a scheduled email	3 hours
5	Planning upcoming roll-out	Discuss and plan who will do what and when in preparation for training	1 hour

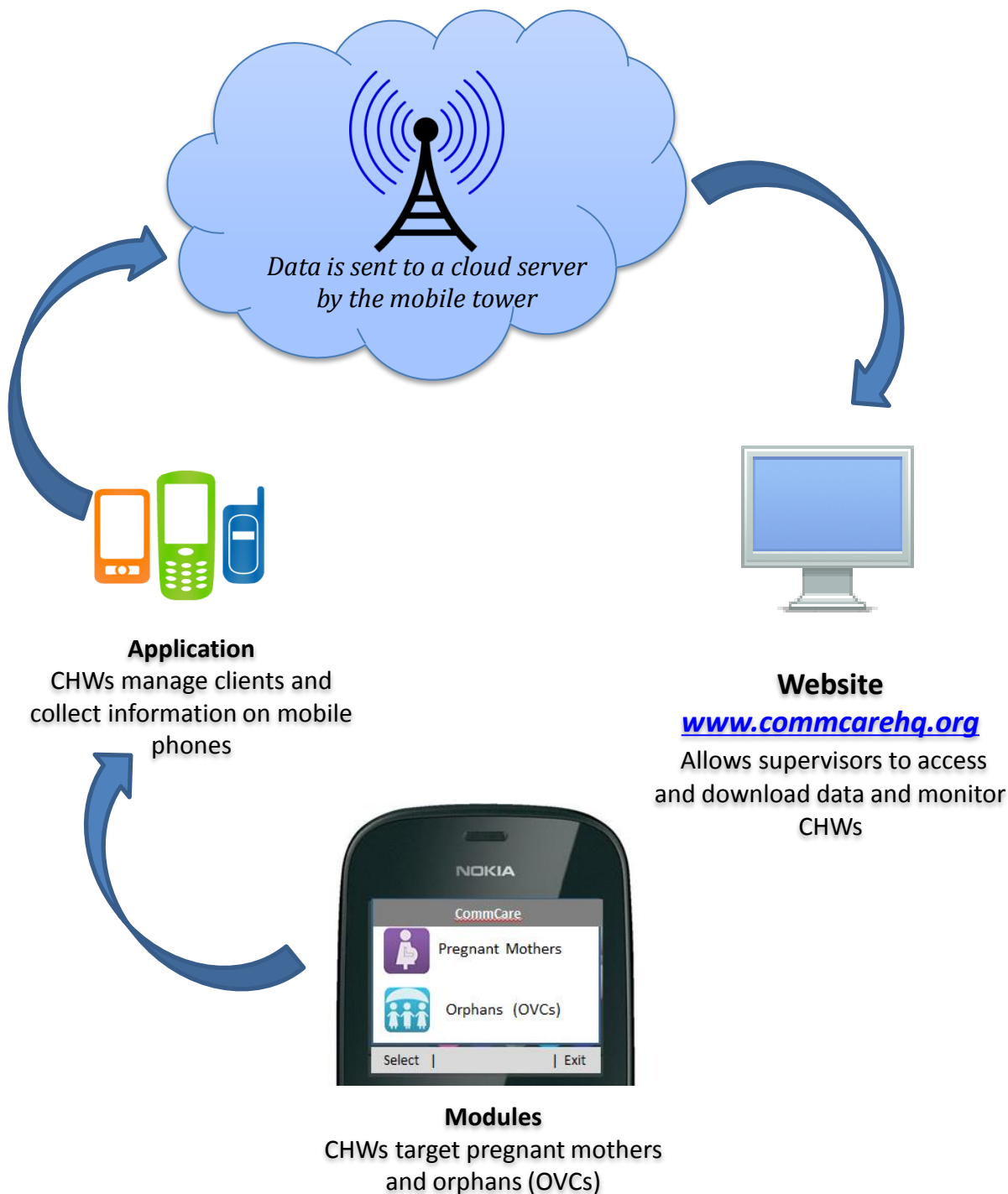
Day 3

Session	Activity	Goal	Estimated Time
1	Setting up phones for training	Each trainer has set-up 25 phones to use in their first round of training	4 hours

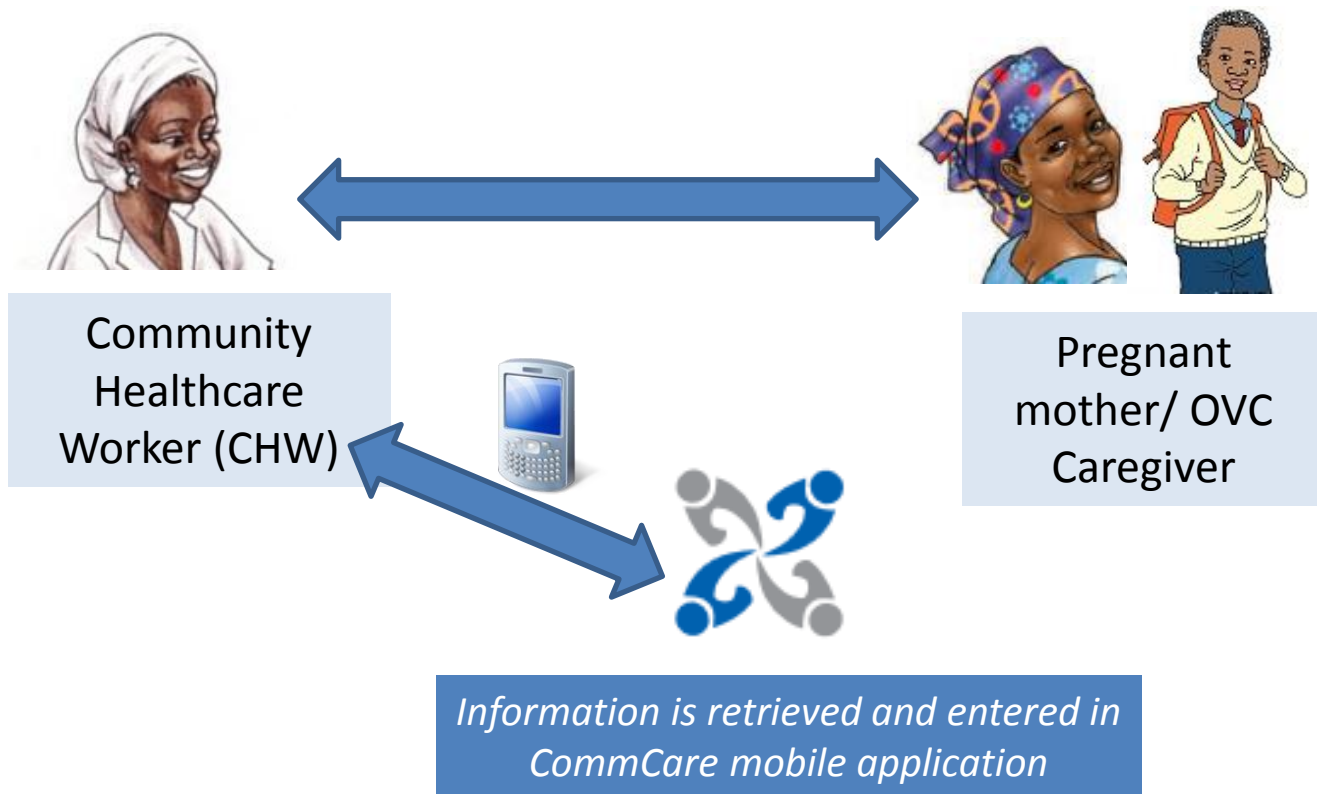
3. CommCare Overview



CommCare Mobile sends data over standard phone networks for inspection on the web in real-time. With complex form logic and data validation, CommCare supports a variety of projects, from simple surveys to complex counseling forms.



4. Application Overview



A **Module** holds all of the **forms** for a type of **case**. In this **application** there are two types of cases – “Pregnant Mothers” and “Orphans (OVCs).” We fill out the **forms** for each **case** in order to track them over time. The questions in each **form** are saved to the **case** in order to use the information later.

Module Screen

Pregnant Mother Forms Screen

Orphans (OVCs) Forms Screen




5. Putting an app on a phone:




STEP 1: Installing Files

OPTION 1: Install from Application Files using SD card

1. Login to your domain (aphiplusnc-2012) on www.cmmcarehq.org
2. Click on the "Applications" tab at the top.
3. Click on the "mHMtaani" application.
4. Navigate to "Deploy" on the upper left hand corner of the sidebar. Locate the most recent version, it will have a star:  Deploy
5. Click on the "Deploy" button next the "Lastet Version"
6. Choose "Download to J2ME"
7. Download the .jar and .jad files. Ensure they both have the same name (e.g. CommCare.jad and CommCare.jar, not CommCare (1).jad and CommCare.jar). Usually these files will be saved to the 'Downloads' folder on your computer
8. Copy the files from your computer to the phone's SD card. If you have correctly connected your phone to the computer, the SD card should show up as a folder under My Computer.
9. If you removed the SD card from your phone, put the MicroSD card back into your phone

OPTION 2: Send to Phones using SMS

1. Delete any existing CommCare apps from your phone's local memory
2. Login to your domain. Click on the "Applications" menu.
3. Locate the version number that will be used for deployment. Click on the "Deploy" button.  Deploy
4. Select "Send to Phones by SMS"
5. Type the phone number of the phone and hit "Send"
6. The phone should receive a text message. Open it, and click the link in the message.
7. Scroll down using the center button and until the selection is on the bit.ly link.
8. Click on the center key or "Use" to open the link.
9. The phone will ask whether you would like to go to this web address. Select "Go to" and hit the center key.
10. The Opera Mini mobile internet browser should open. Please wait a few moments while the phone connects to the internet.
11. Once loaded, the CommCare download should appear which displays the CommCare.jad file. The "Open" button will be already selected in blue. Press the center key to start downloading.
12. The phone will start loading the information it needs to download the application.
13. The phone will display an application notification asking you to "Accept" and confirm the application download. Hit the center key to "Accept."
14. Once the download is complete, you will be asked if you want to close the browser and open the application. Hit the center key to answer "Yes."
15. You will be asked if you want to allow editing and adding data. This is one of the three application permissions that need to be set. You may answer "Yes" for now and then return to complete the final application settings.
16. CommCare should initialize, load resources and start-up correctly.
17. If the application is downloaded using this method, the application automatically downloads into the "Games" folder in the "Applications" folder.
18. Accept all download confirmations.

5. Putting an app on a phone:



STEP 2: Installing Multimedia

STEP 2: Installing Multimedia File

1. From the Applications tab, click on Deploy.
2. In the pop-up window, click on Download Multimedia
3. Click on Download ZIP
4. The file will be downloaded as a .ZIP
5. Unzip the file in order to use it (right click and "Extract all")
6. Move this onto the SD card



commcare.zip

Preview in Emulator

Download to Java Phone

1. Download **both** of the following files:
[Download CommCare.jad](#)
[Download CommCare.jar](#)
2. For help on how to install, see [Set Up Mobile Phone](#).
3. If you have any issues with the installation, please refer to [Troubleshooting Phone Problems](#).

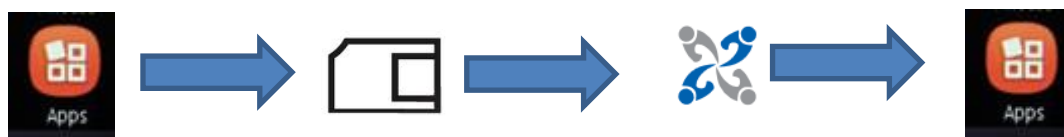
Download to Android

Send to phone via SMS

Download Multimedia

STEP 3: Store CommCare on the Phone Memory

1. Store CommCare from the phone's local memory because it's much easier to manage phone settings and it is safer and more secure opposed to storing the application in the memory card. If you installed via SMS the application will already be on local phone memory.
2. To move CommCare files from the SD card to the phone's memory, access the SD card on the phone's "Applications" menu.
3. Scroll to the application file called "CommCare". This is the file which displays the CommCare logo.
4. Press "Options" which is the left soft key button.
5. Select "Move".
6. Now, you can select the location where you want to put the CommCare application. You may transfer the application file to either the Games or Collections folder. Select the "Apps" folder. Keep the folder you choose consistent for all users.



Use the options button to move the CommCare application from the SD card to the "Applications" folder.



5. Putting an app on a phone:

STEP 4: Restoring User

Logging into CommCare

1. **ADMIN LOGIN:** For administrators and includes advanced options such as testing the network connection, adding new users, restoring users, etc. The password for Admin mode is always "234"
2. **DEMO LOGIN:** Allows users to login without entering *real live* data. This is a "practice mode" or a "demonstration mode"
1. **RESTORING USER:** This sets the phone up for a particular person or "user." Once CommCare is restored, we can then log in with a specific username and password.



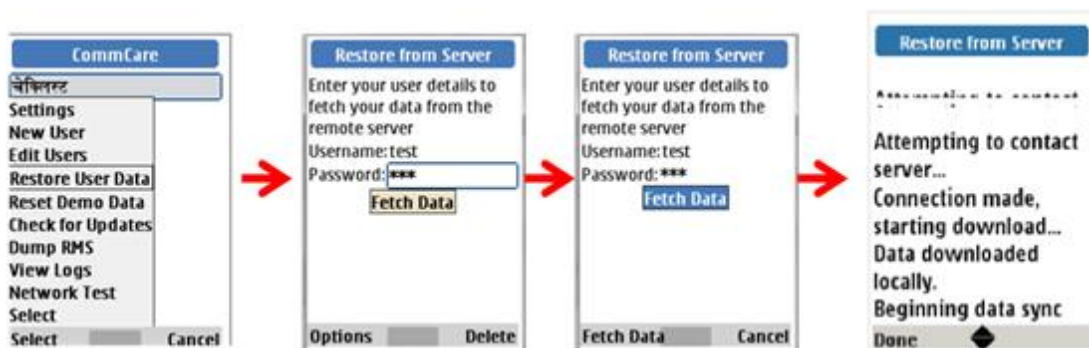
STEP 4: Store CommCare on the Phone Memory

FIRST LOGIN:

1. If it is the first time you are logging in, click "Restore user data"
2. Enter the username (*firstinitial.lastname*) and password (*last 4 digits of their national ID*)
3. Wait for the success message!

FROM ADMIN MODE:

1. Log in with the username "admin," the password is "234"
2. Select the "options" softkey on the left side
3. Choose "Restore User Data"
4. Enter the username (*firstinitial.lastname*) and password (*last 4 digits of their national ID*)
5. Wait for the success message!

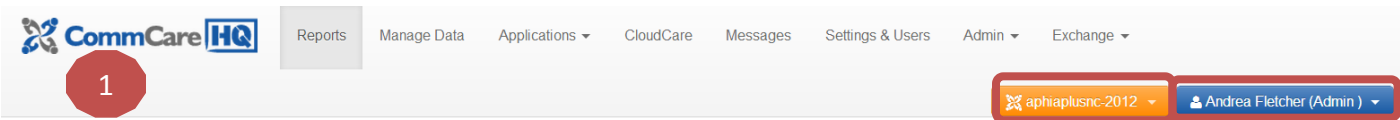


STEP 5: Set CommCare as a Short Cut

For easy access, you can set a shortcut to the CommCare application. Follow these instructions to do so:

1. From the "Menu" choose "Settings"
2. Select "My shortcuts" → "-Right selection key" → "Application list" (with the folder)
3. Choose "CommCare" as the application
4. To open CommCare, now you should select the left soft key on the home screen.

6. CommCare HQ Overview



CommCare HQ or “Headquarters” is the website where you can:

- View data
- Export submissions to excel
- See custom reports of workers
- Build and deploy applications
- Create, edit, and manage users

In CommCareHQ our **Cases** are



“ovc”



“mother”

CommCareHQ works best on Chrome and Firefox browsers. Please make sure you are using these browsers.

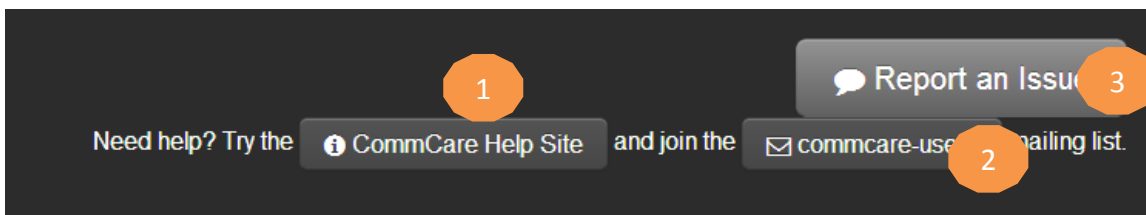


Getting Started:

1. Go to www.commcarehq.org
2. Create a new user or Login, your login is in the upper right hand of the screen.
3. Confirm email
4. Confirm you have been added to the project space “aphiplusnc-2012” from email that should be in your inbox. The project

Other useful parts of CommCare HQ:

1. The Help Site
2. The user mailing list
3. Reporting an issue
4. *CloudCare*- for entering Data on a computer
5. *Exchange* – our very own app store!



6a. Setting up CHWs



Settings & Users > Mobile Workers > New Mobile Worker

MOBILE USERS
Mobile Workers
New Mobile Worker 2
Groups

COMMCCARE HQ USERS
Web Users

MY ACCOUNT
My Account Settings
Change My Password

CLOUDCARE SETTINGS
App Access

Create new Mobile Worker account

Username 3

Password REQUIRED

Password (reenter) REQUIRED

4

Creating a New CHW

1. Select the "Settings & Users" tab from the menu
2. Choose "New Mobile Worker" to create a new profile
3. Enter the information
 - Username = *firstinitial.lastname*
 - Password = *last 4 digits of national ID*
4. Create New Mobile Worker

Basic Custom Registration Data

User Information

Username:

First name

Last name

E-mail

Language

Write in the language code to set the default language this user has (partial).

Role

You can also:

1. Add more information
2. Add a mobile number
3. Reset their password

Add a New Number

Phone Number: 2

Please enter number, including international code, in digits only

Reset Password

3



1

2

3

4

Creating and Editing Groups:

1. Select the “Settings & Users” tab from the menu
2. Choose “Web Users” to create a new profile
3. Create a “New Group” or click on the group to add new CHWs
4. Add CHWs to the group

Can I add everyone to a group at once?

Yes, you can do this by “bulk uploading users” under mobile workers. Simply click on “Bulk upload” in setting up users and follow the instructions.

What groups should I make?

Each Clinic or CU should be in a group with all of the CHWs in that clinic or CU added to that group. This is important for managing users and reports.

Group Naming Conventions

1. Each Group is named after the Clinical Unit (CU)
2. The first letter of the Group name is cpaitalized, the rest are lowercase.
Example: Kangemi. **NOT** kangemi, KANGEMI, or kANGeMi

6c. Managing Web Users



CommCare HQ | Reports | Manage Data | Applications | CloudCare | Messages | **Settings & Users** | Admin | Exchange | aphiaplusno-2012 | Andrea Fletcher (Admin)

Invitation sent to BGithinj@aphiaplus-no.org

Settings & Users > Web Users

MOBILE USERS
Mobile Workers
Groups

COMM-CARE HQ USERS
Web Users

MY ACCOUNT
My Account Settings
Change My Password

CLOUDCARE SETTINGS
App Access

PROJECT ADMINISTRATION
Project Settings
CommCare Exchange
Multimedia Sharing
Internal Settings
Data Forwarding

Web Users
Web Users can manage forms on CommCare HQ. However, these users cannot submit forms from phones using the CommCare Application.

+ Invite Web User

E-mail	Role	Name	Phone Numbers	Remove
afletcher@dimagi.com	Admin	Andrea Fletcher		
eastro@pathfinder.org	Admin	Ernest Ostro		Remove Membership
gathoni@pathfinder.org	Admin	Jackson Gathoni		Remove Membership
isharpey@dimagi.com	Admin	Kieran at Dimagi		Remove Membership
mmonabb@pathfinder.org	Admin	Marion McNabb	+1404 985 8149	Remove Membership
skonah@pathfinder.org	Admin	Stephen Konah		Remove Membership

Creating a New Web User

1. Select the "Settings & Users" tab from the menu
2. Choose "Web Users" to create a new profile
3. "Invite a Web User"
4. Enter their email address
5. Select their "Project Role"
6. Send Invitation --An email will be sent, and they must accept and create an account

Information for the person you would like to invite to your project

Email Address

Project Role **REQUIRED**

Send Invite

Project Role	Capabilities
Technical Working Group	Can manage users, add users, view all reports, export data
Field Coordinator	Manages users, add users, view all reports and export data
M&E team	Views reports and exports data
Mobile Worker	Can only enter information on phone or on "Cloud Care"

6d. Reports



1

Project Reports > Select a Report to View

TOOLS

My Saved Reports

MONITOR WORKERS

- Daily Form Activity
- Submissions By Form
- Form Completion Time
- Case Activity
- Form Completion vs. Submission Trends
- Worker Activity Times

My Saved Reports

My Scheduled Reports

2

Report	Saved Report Name	Description	Date Range	
Case Activity	Case Activity			Delete
Submissions By Form	Form Submissions		Last 7 days	Delete

2

> Daily Form Activity

Report Filters

User Type: Mobile Worker, demo_user, admin, Unknown Users

Group: Everybody

Filter Dates By: Completion Time

Completion time is when the form is completed on the phone.
Submission time is when CommCare HQ receives the form.

Date Range: From 2013-04-16 To 2013-04-23

Apply Favorites Save... Email Supported

Creating a New Favorite Report

1. Select the "Reports" tab from the menu
2. Choose a report from "Monitor Workers" to create a new "Favorite"
3. Set Filters
4. Set Date Range
5. Save as a Favorite
6. Return to "My saved reports" to automatically see your report

3

4

5

Creating a New Scheduled Report

1. Select "My Saved Reports"
2. Choose "My Scheduled Reports" tab
3. Add
4. Select how often and the time you would like them sent
5. Add more recipients

New Scheduled Report

Saved report(s)*

0 Items selected	Remove all	Add all
		Case Activity (Case Activity) +
		Form Submissions (Submissions By Form) +

Note: not all built-in reports support email delivery, so some of your saved reports may not appear in this list

Day*: Every Day

Time*: 8:00

Sorry, at the moment all times are in GMT.

Send to me

Other recipients

3

4

5

6e. Data Exports



CommCare HQ | Reports (1) | Manage Data | Applications | CloudCare | Messages | Settings & Users | Admin | Exchange | aphiplusnc-2012 | Andrea Fletcher (Admin)

TOOLS
My Saved Reports

MONITOR WORKERS
Daily Form Activity
Submissions By Form
Form Completion Time
Case Activity
Form Completion vs. Submission Trends
Worker Activity Times

INSPECT DATA
Submit History
Case List

RAW DATA
Export Submissions to Excel (2)
Export Cases, Referrals, &

Report Filters

User Type: Mobile Worker (3) | demo_user | admin | Unknown Users

Group: Everybody (3)

Date Range: From 2012-06-22 To 2013-04-30 (4) This report's time

Apply | Favorites | Save... (5)

Hide Filter Options

Saved Custom Exports (11)

Creating Data Exports for Forms:

1. Select the "Reports" tab from the menu
2. Choose "Export Submissions to Excel"
3. Select group
4. Select Date Range
5. "Apply" and "Save" to favorites
6. Choose a form and click "Create Custom Export"
7. Choose Export Name
8. Select questions
9. Enter display name (Excel column heading)
10. "Create" at the bottom of the screen
11. Go to "Saved Custom Exports" click Download.
12. Your excel file with all of the information will be downloaded

Export Settings

Export Name: Andrea's Custom Export (6)

Default file type: Excel 2007 (7)

Include duplicates and other unprocessed forms
 Save this report daily?

Forms

Choose the fields you want to export. You can drag and drop fields to reorder them. You can also rename fields, which will update the headers in the export file.

	Include this Field? <input type="checkbox"/> Select All <input type="checkbox"/> Select None	Field	Display
1	<input checked="" type="checkbox"/> (8)	mother_first_name	First name (9)
1	<input checked="" type="checkbox"/>	mother_surname	Surname
1	<input checked="" type="checkbox"/>	mother_dob	mother_dob

7. CommCare Terms



Here are some concepts and terms you'll become familiar with as you use CommCare. Most of the terms correspond to functionality you'll use either on the website side (CommCareHQ) or the mobile phone side.

Application: The complete CommCare executable that gets downloaded and installed on a phone. This is the client-side mobile application that will submit data to CommCareHQ.

- **Module:** A set of forms related to one topic area. For example, we have a “Pregnant Mothers” module, and Orphans (OVCs) module. A single CommCare app can contain multiple modules.
- **Case:** includes all the information which needs to persist on the CommCare phone between different forms. Our cases are “Pregnant mother” and “OVC”
- **Forms:** A series of questions and prompts that the user views sequentially on the phone. This is pretty much the core content of CommCare applications. When users submit data, they submit completed forms. They are fully customizable and support all kinds of handy things, like multiple languages, skip logic, and multimedia content. Forms are based on the XForms standard.

CommCare Mobile: The CommCare mobile phone tracks client data and provides decision support during client visits and complements CommCareHQ.

- **Demo Login:** log in as a fake "demo" user and makes sure that data is not used in any automated reports.
- **Admin Login:** a log in for administrators and includes advanced functionality. The password for Admin mode is always 234
- **User Login:** User prompts you for the username and password of a registered user. All data submitted is tagged as from that user. Each CHW has their own username and password which is either created on the website, or by logging in as admin on the phone and creating a new user.
- **New User:** Registers a new CommCare user when logged in as admin.. Creates a username and password for them on the phone and online.
- **Restore User Data:** Send to the phone all the data for a user that has been previously submitted to CommCareHQ. Enter the user name and password of the CommCare user, and select "Fetch Data" to start the automatic sync.
- **Network Test:** Test your phone's internet connection. You need a working connection in order to submit forms properly.



CommCareHQ: (www.commcarehq.org) This is the website that makes easy to create and deploy applications, view and analyze data, and manage and communicate with users.

- **Project Space:** A secure web portal into your CommCare project. It contains all form submissions from your CommCare applications, as well as tools that help you create, manage, and deploy your applications and workers.
- **Users:** Anyone involved with the CommCare project. This can include CHWs, field coordinators, project managers, and administrators.
- **Submissions:** Forms submitted from CommCare mobile applications to the server. When you fill out a form on the CommCare mobile application and it sends automatically, it becomes a “submission.”
- **User Management:** You can use CommCareHQ to organize your users in the following ways:
 - **Mobile User:** A CHW or CHEW who uses a mobile application to submit information.
 - **Web User:** A supervisor or field coordinator who uses CommCareHQ to manage the project or view reports. If you're reading this, you fall into this category.
 - **Groups:** We organize CHWs into groups by clinic unit (CU). You can view reports and deploy applications strategically to a particular group, or CU.
- **Reports:** When you log into your project space, the first page you will see is the Reports page. Here you can view a number of reports automatically generated from the data coming into your project space. These reports can help you monitor CHW performance and inspect the data they submit.

Deploying an Application: You can easily deploy your applications to phones out in the field using several different methods, the following terms are commonly used for deploying:

- **Build:** A "build" is an actual version of an application that will run on a phone. More specifically, it is the .jar file and .jad file. You will always deploy the *starred build, or latest build.*
- **Version:** Each time you save a change to your application, the version number increases. This helps you keep track of different builds of the application you may create over time.
- **.jad and .jar files:** These files, when placed a phone, make up a CommCare application.
- **Multimedia Folder:** This contains all of the images for the application. This is downloaded in a separate folder and stored on the SD card of the phone. It is a .zip file, and therefore you must “unzip” or “extract” the file before placing it on the SD card.

8. Basic Trouble Shooting Guide

