jphes Documentation

Release 1.1.0

HealthIT-UoN

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Introduction

1.1 Background

JPHES is a web-based open source solution customized for *PEPFAR Kenya* partner reporting a nd data attribution built on DHIS2. The platform replaces KePMS reporting system which was a standalone *Microsoft Access* based indicator monitoring database for use in the management, monitoring and evaluation of HIV/AIDS treatment and prevention programs supported by PEPFAR. It was developed in 2006 to plug the gap between the Government of Kenya reporting system and the PEPFAR reporting requirements. It was designed to operate at the level of in-country implementing partners who manage program specific data and forward it to national level where it is aggregated automatically by United States of America Government (USG) program managers.

Now, the JPHES platform supports non-HIV indicator reporting, attribution of the indicators by partners, analysis and visualition of attributed. It has Apps for maintaining the JPHES hierarchy, programs, user management and data push/pull.

Data for JPHES indicators already captured in the National DHIS2 is pulled routinely using an API based middleware between the two systems.

1.2 Why JPHES?

JPHES portal comes with the following benefits:

- 1.To avoid double data entry to JPHES and the National DHIS2 by fetching the entered National DHIS2 data via the API.
- 2.To perform attribution on the unattributed national DHIS2 data basing on Partner data element ownership for program level data consumption in decision making.
- 3.To enhance the National DHIS2 data by pulling efforts of all implementing partners in making sure that the data entered into the national DHIS2 is accurate.
- 4.The platform streamlines health data where all partners can access up to date data from the same database instance unlike the previous scenario where each partner was running their own KePMS instances.

- 5.The portal provides aggregated data for programs per sites, mechanisms, agencies and donor levels.
- 6.Providing more analytical features for partners to monitor their own performance and make decisions informed by the data.
- 7. The plaform has data quality, approval and validation features to ensure data in the system is accurate.
- 8. It has an elaborate object sharing and role-based access, thus ensures users access functionalites and data based on their hierarchy level.

List of Abbreviations and Terminologies

2.1 Abbreviations

- API-Application Programming Interface.
- AIDS-Acquired Immune Deficiency Syndrome.
- DATIM4U-Data for Accountability, Transparency and Impact for Operating Units.
- **DHIS2** District Health Information System Version 2.
- HIV Human Immunodeficiency Virus.
- **IPs** Implementing Partners.
- IPSL Implementing Partners Site List.
- KePMS Kenya HIV/AIDS Program Monitoring System.
- MoH Ministry of Health.
- PEPFAR-President's Emergency Plan for AIDS Relief.

2.2 Terminologies

- Implementing partner-An organization working on behalf of an agency to perform services.
- Funding agency-An agency providing support to partners.

Getting Started

3.1 System Access

 $Access \textit{JPHES} \ via \ http://jphesportal.uonbi.ac.ke \ . \ To \ login \ to \ the \ platform, provide \ your \ username \ and \ password \ then \ click \ the \ login \ button.$

Note: If you have challenges signing in, send an email to jphes@healthit.uonbi.ac.ke for assistance or via the jphes servicedesk



Fig.- JPHES Login Page

If successful, it directs you to the JPHES dashboard.



Fig.- Landing page

To change password, click on the user profile app.

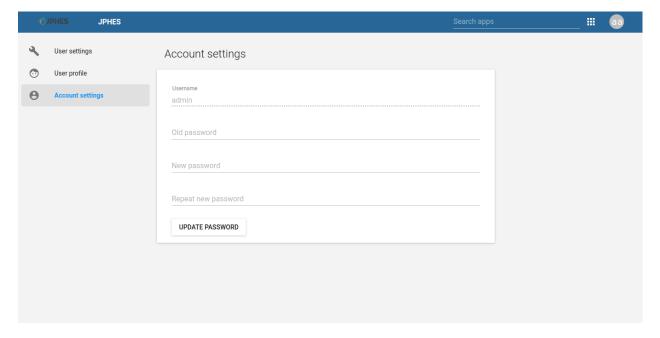


Fig.- Change User password

3.2 JPHES/DHIS2 Applications

Available applications in the platform.

Note: These applications will be visible based on your user role in the platform.

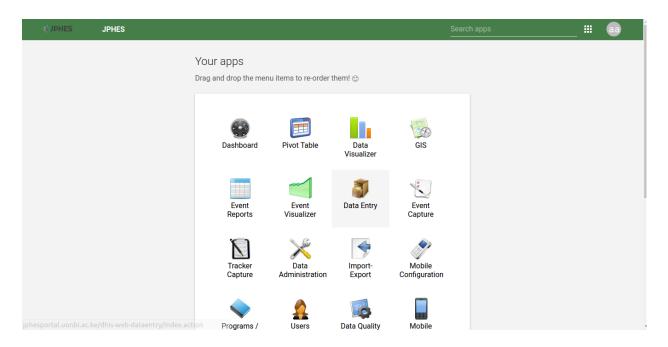


Fig.- Apps page 1

Custom JPHES Apps

- JPHES Hirerachy For creating and maintaining the attribution hierarchy.
- JPHES Programs For grouping data elements and indicators.
- JPHES Support Redirects to the JPHES Servicedesk page.
- JPHES Documentation Redirects to the JPHES documentations.
- JPHES Homepage Redirects to the JPHES Homepage

Fig.- Apps page 2

Navigate to the about page using the account icon.

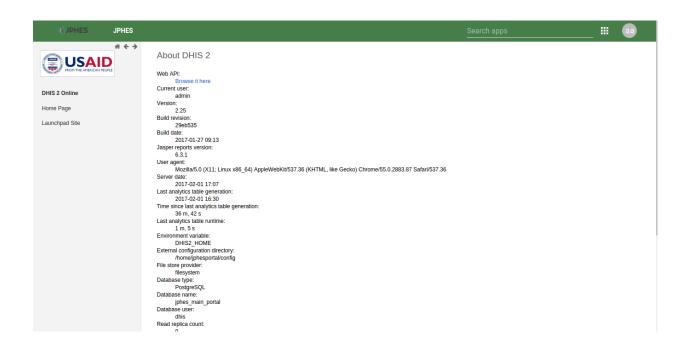
Fig.- About Page

3.3 JPHES Functionalities

What the user can do

- Create/delete/update/view programs.
- Create/update/view Support programs.
- Create/update/view support agencies.
- Create/update/view users within a certain level e.g mechanism, agency or donor levels.
- · IPSL management.
- Pull Data from the National DHIS2.





- Data Push to DATIM4U.
- Perform data attribution,.
- Reports (standard reports), Data Visualization, Data Entry and Pivot tables analysis.

3.4 JPHES Hierarchy

Fig. Hierarchy Units

3.4.1 National Unit Level

- Create, Update and Remove Programs.
- Create, Update and Remove Development Partners e.g PEPFAR.
- Assign Programs to a Development Partner.
- View a list of the development partners.
- View details of each development partner such as the programs assigned and the agencies supported by the development partner. In addition, can drill down to the lowest level(mechansim).
- Analysis and reports for all units(Donor, Agency, and Mechanism).

3.4.2 Donor Unit LeveL

- Create, Update and Remove agencies.
- View a list of the agencies.
- View details of each agency: the programs assigned to the agency and the Implementing mechanisms the agency is supporting.
- Create, view and update users for this specific level.
- Analysis and reports for donor unit->agency units->mechanism units.

3.4.3 Agency Unit Level

- Create, Update and Remove Implementing Mechanism.
- Assign programs to an Implementing mechanism.
- View the list of the Implementing mechanisms.
- · View details of each IM: the programs supported and the facilities under the Implementing Mechanism.
- Analysis and reports for the agency unit->mechanism units.

3.4.4 Mechanism Unit Level

- View a list of all facilities supported by the Implementing mechanism.
- View a list of the programs supported by the IM.
- · Data Entry and approval

• Analysis and reports for the mechanism unit.

Indicators

4.1 Nutrition

Nutrition indicators

4.2 MCH

Maternal and Child Health indicators

4.3 FPRH

Family Planning and Reproductive Health indicators

4.4 Malaria

Malaria Indicators

4.5 WASH

Water, Sanitation and Hygiene indicators

4.6 Summarized Program Indicators

WASH, Malaria, Nutrition, Family Planning, Maternal and Child Health

4.7 Non-Service Delivery Program

Health Systems Strengthenning

Programs

To naviagate to the JPHES programs app, search for JPHES Program Management on the search bar then click on it.

Note: functionalites available are based on user roles.

5.1 Program List

This page displays the programs already created. On clicking on a program item a **pop up menu** appears that allows the user to perform functions such as:

- Show details of a program.
- Remove a program.
- · Update a program.
- View program data elements.
- View program indicators.

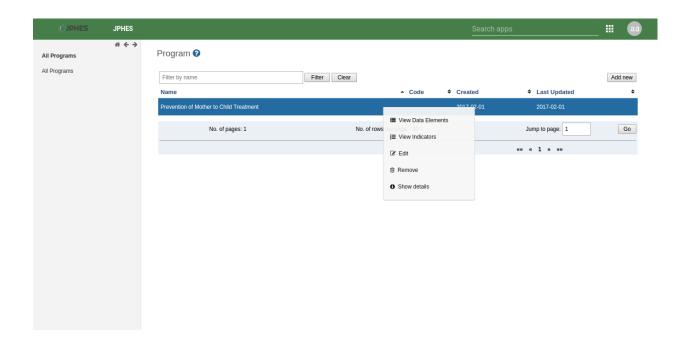
Fig-Pop-up menu on the program list.

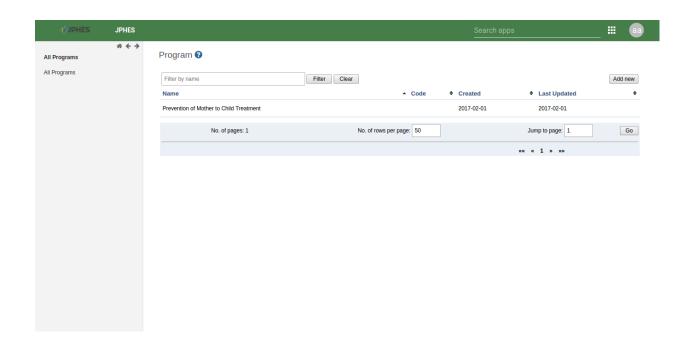
Fig-JPHES program list.

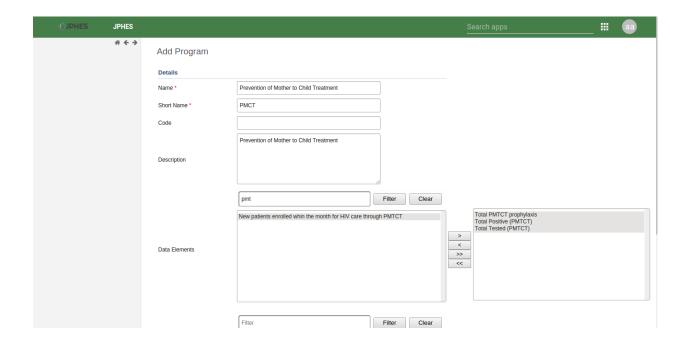
5.2 Creating a Program

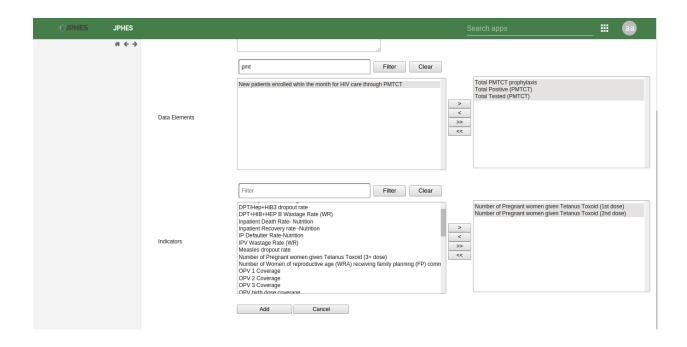
To display the program creation page, click on the *add button* on the program list page. During this process the user has to provide the program name, program short name, program description and select data elements/indicators for the program.

Fig-Add Program Page









5.3 Edit Program

To display the program edit page, on the pop-up menu select *edit* option. It allows the user to update details of the program such as the program name, short name, description, the data elements and indicators.

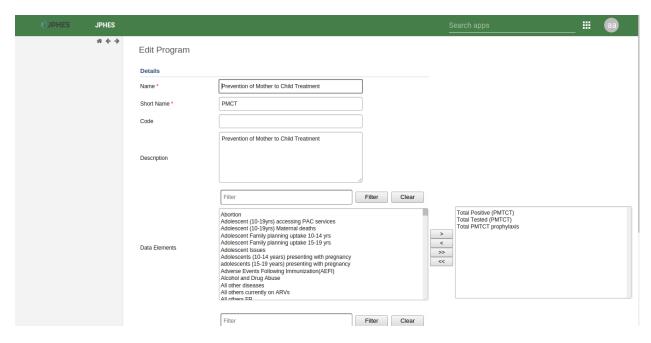


Fig-Program Edit Page

5.4 Show Program Details

On the pop-up menu, select *show details* option to display program details. It shows summary details of the program such as number of data elements, program description and number of indicators.

Fig. Show Program Details.

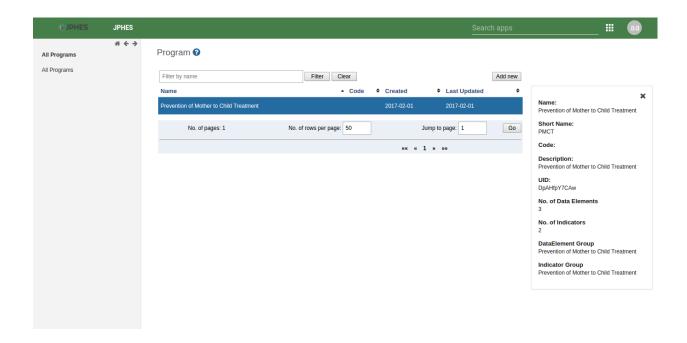
5.5 View Program Data Elements

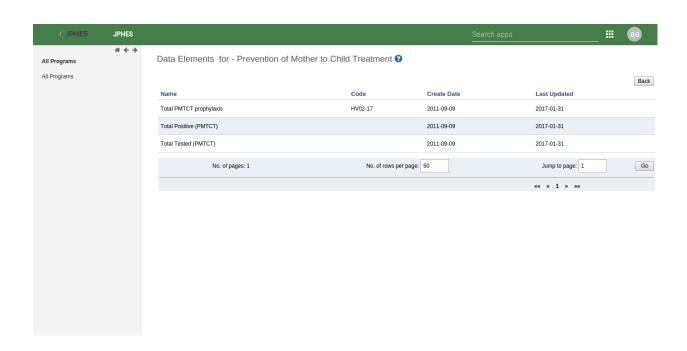
On selecting the *view dataelements* option on the pop-up menu. It displays the data elements assigned to the program. Fig. Program Data elements.

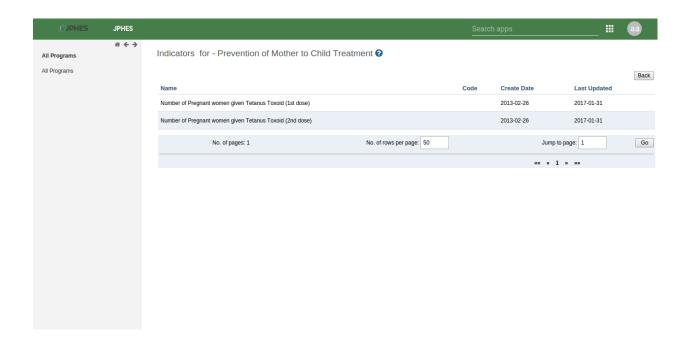
5.6 View Program Indicators

On selecting the view indicators option on the pop-up menu. It displays the indicators assigned to the program.

Fig. Program Indicators







Hierarchy

To naviagate to the hierarchy app, search for JPHES Hierarchy on the search bar then click on it.

Note: functionalites available are based on user roles.

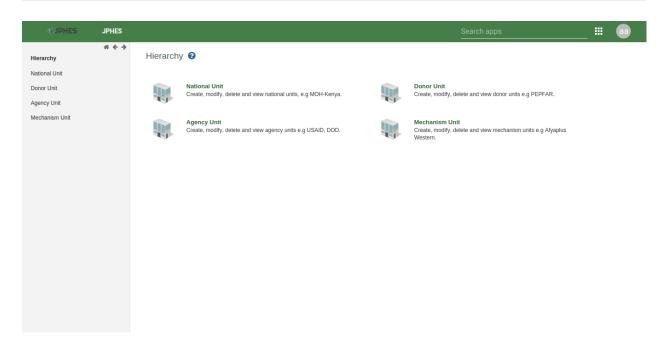


Fig -JPHES Hierarchy units.

6.1 National Unit Level

Create and update national unit, and to create/update donor units.

6.1.1 List of National Unit

Note: To display the pop-out menu(with options e.g update, view assigned progams, show details) click on a specific unit in the list.

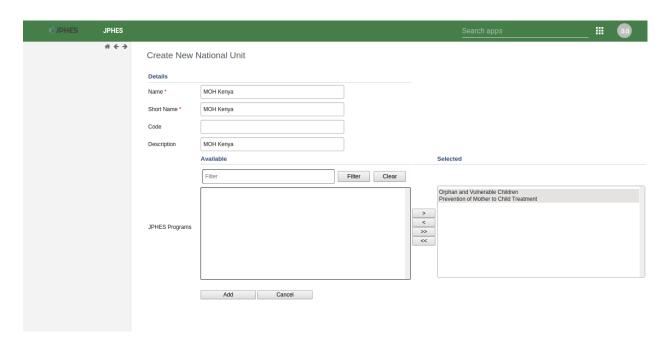


Fig -list of national units.

6.1.2 Add National Unit

Note: Must provide supported programs.

Fig -Add a National Unit.

6.1.3 National Unit Details

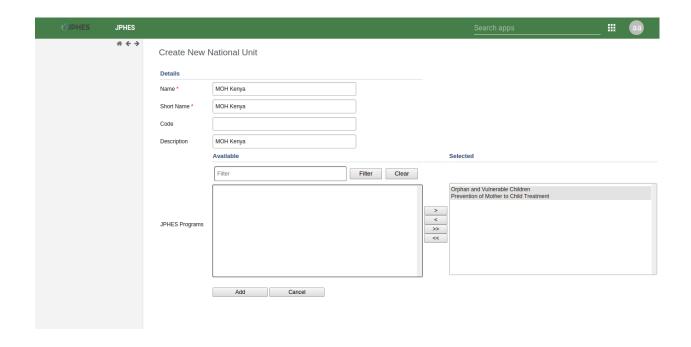
Click on the show details option in the menu popup.

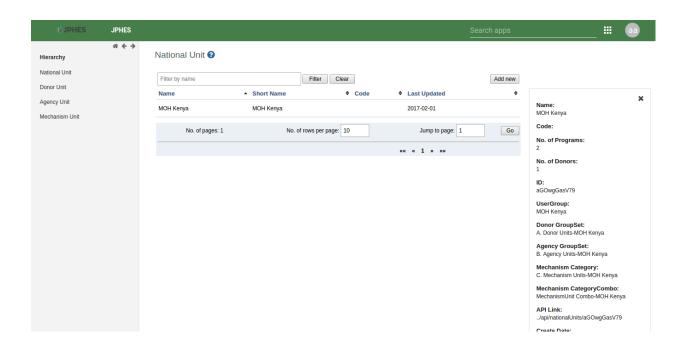
Fig -National Unit details.

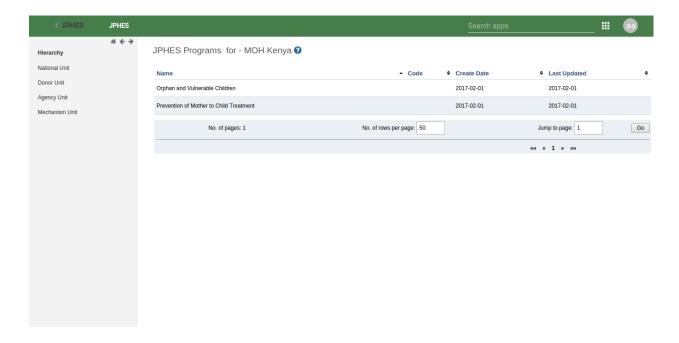
6.1.4 Assigned National Unit Programs

Click on the assigned programs option in the menu popup.

Fig -National Unit Programs.







6.1.5 Add a Donor Unit to a National Unit

Click on the *add donor unit* option in the pop-up menu on the national unit.

Note: Provide the supported programs by the donor unit.

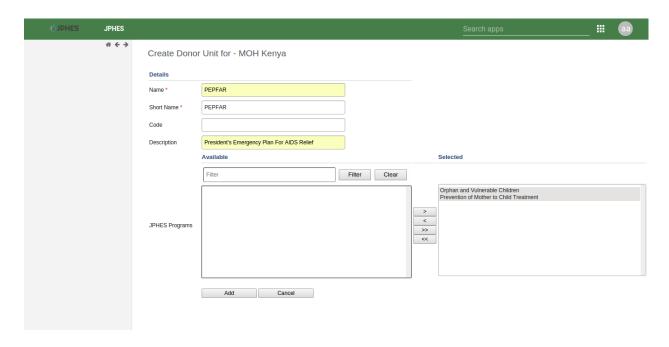


Fig -Adding a donor unit to a national unit.

6.2 Donor Unit Level

6.2.1 List of Donor

Note: To display the pop-out menu(with options e.g add agency and show details) click on the donor unit in the list.

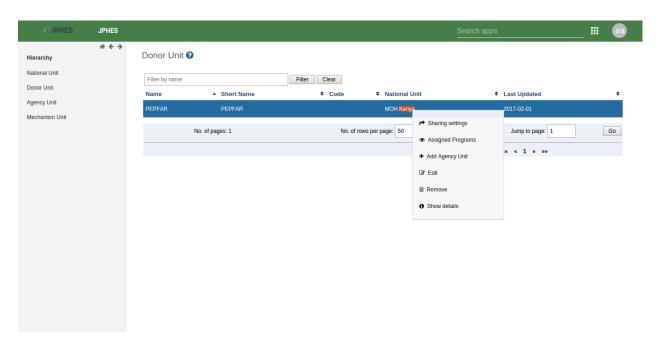


Fig -list of donors.

6.2.2 Add an Agency to a Donor Unit

Click on the add agency option in the menu popup.

Note: Must provide programs supported by the agency.

Fig - Adding an agency to a selected donor unit

6.2.3 Assigned Donor Unit Programs

Click on the assigned programs option in the menu popup.

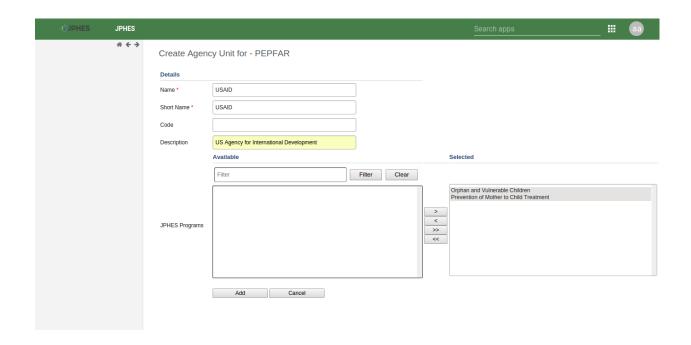
Fig - Donor Unit Programs.

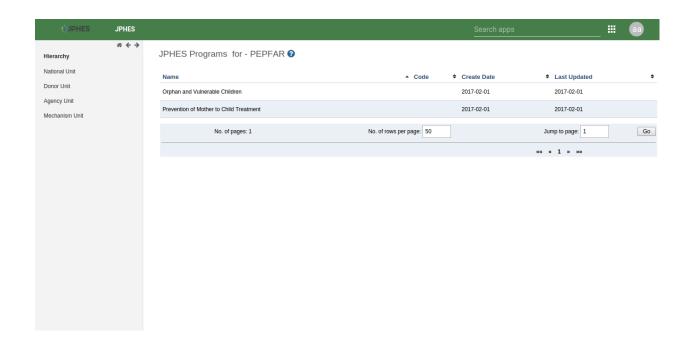
6.2.4 Donor Details

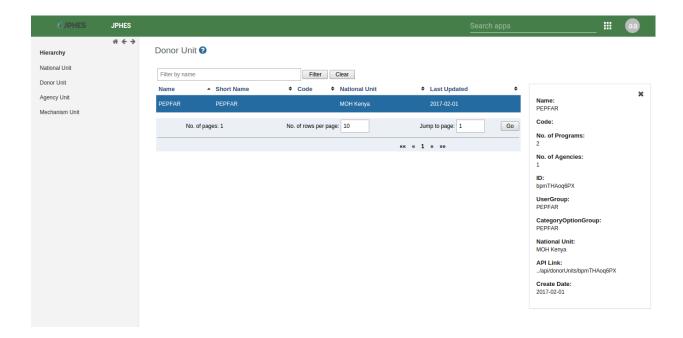
Click on the *show details* option in the menu popup.

Fig -Viewing donor detials.

6.2. Donor Unit Level 23







6.3 Agency Unit Level

Create/update mechanism units.

6.3.1 List of Agency Unit

Note: To display the pop-out menu(with options e.g add mechanism, show details) click on an agency unit in the list.

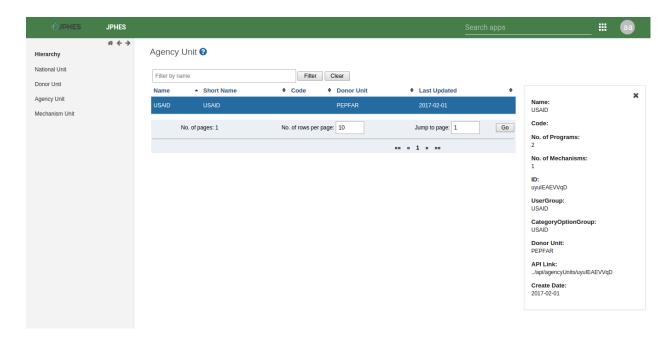


Fig -list of agency units.

6.3.2 Add Mechanism to an Agency

Click on the *add mechanism* option in the menu popup.

Note: Must provide programs supported by the mechansism.

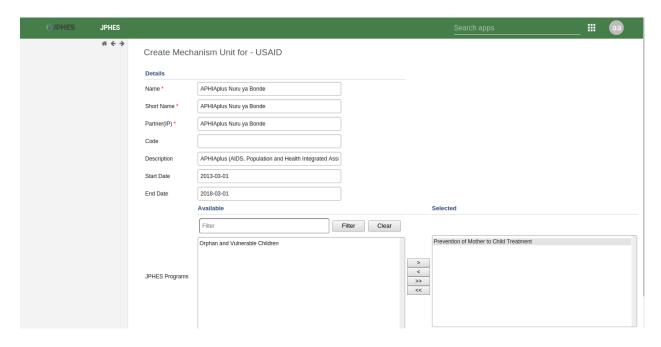


Fig -Adding a Mechanism to an agency unit

6.3.3 Assigned Agency Unit Programs

Click on the assigned programs option in the menu popup.

Fig - Agency Unit Programs.

6.3.4 Agency Details

Click on the show details option in the menu popup.

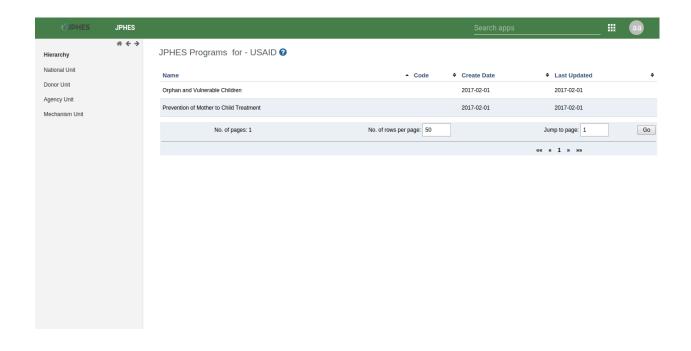
Fig -View agency detials.

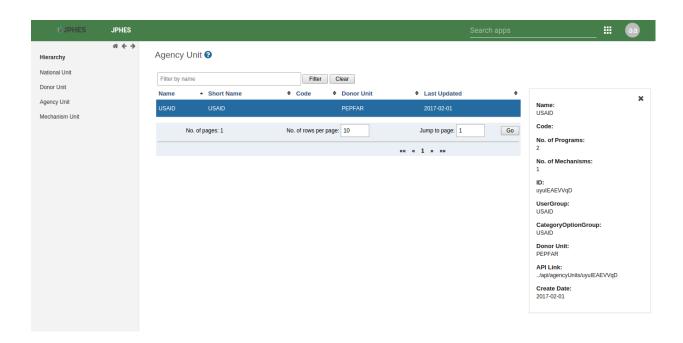
6.4 Mechanism Unit Level

View details, programs and organisation units of the mechanism units

6.4.1 List of Mechanism Unit

Note: To display the pop-out menu(with options e.g show details) click on mechanism unit in the list.





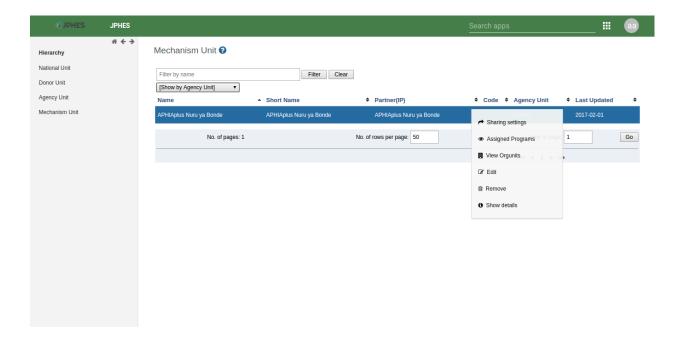


Fig -list of mechanism units.

6.4.2 Mechanism Details

Click on the show details option in the menu popup.

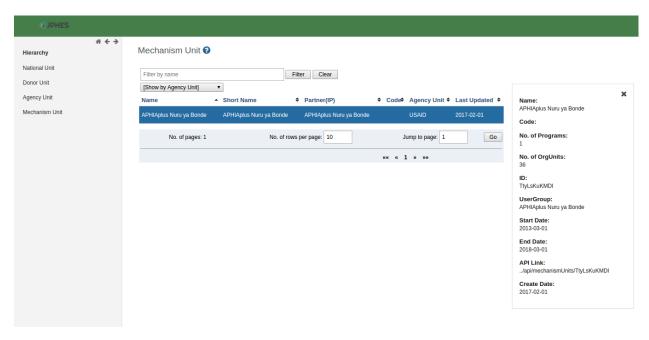


Fig -Mechanism details.

6.4.3 Mechanism Programs

Click on the assigned programs option in the menu popup.

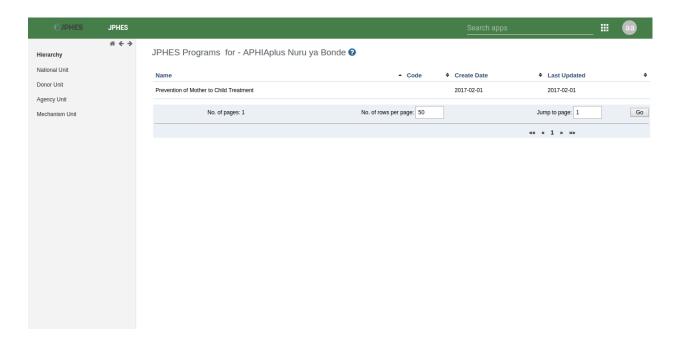


Fig -Mechanism programs.

6.4.4 Mechanism Orgunits

Click on the view mechanism organits option in the menu popup.



Fig -Organisation units supported.

Datasets

JPHES contains the following datasets, categorized here by their level of reporting

7.1 National/Mechanism Level

- National Performance(Malaria, WASH) Rev. 2018
- Family Planning Narrative Rev. 2018
- Maternal and Child Health Narrative Rev. 2018
- Nutrition Narrative Rev. 2018
- WASH Narrative Rev. 2018
- Malaria Narrative
- Non-Service Delivery Narrative
- Summarized Program Narrative

7.2 County Level

• County Performance(Nutrition, MCH, WASH) - Rev. 2018

7.3 Sub-County Level

- Sub-County Performance(FP, Nutrition, MCH, WASH) Rev. 2018
- Family Planning Target Rev. 2018
- Malaria Target

- Maternal and Child Health Target Rev. 2018
- Nutrition Target Rev. 2018
- WASH Target Rev. 2018

7.4 Ward Level

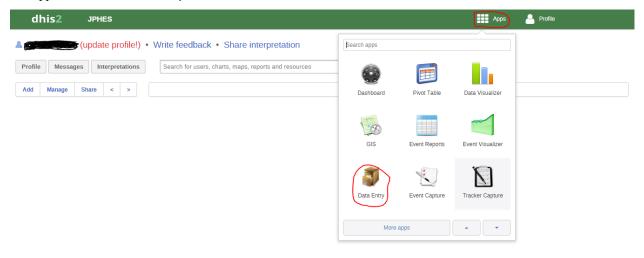
- WASH Performance Rev. 2018
- Malaria Performance

7.5 Facility Level

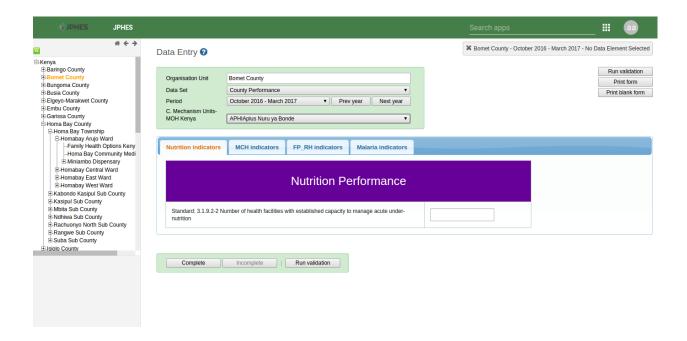
- Maternal and Child Health Performance Rev. 2018
- Nutrition Performance Rev. 2018

Data Entry

The JPHES data entry module is designed in such a way that an Implementing Partner can only enter their data. Data entry in JPHES is done as per the level of the dataset, that is National, County, Ward and Facility. After logging into the system, hover mouse pointer / click on the *Apps* icon on the far left as shown on the figure below. On the dropdown that appears, click on *Data Entry* icon.



This navigates to the data entry page, as shown on the figure below. For data entry forms to appear, you will be required to first select an organization unit/facility you are reporting for on the left panel, the dataset, reporting period and the implementing partner you are reporting for, which comes up after selecting the *organization unit*, *Dataset* and *period* that the user is reporting for.

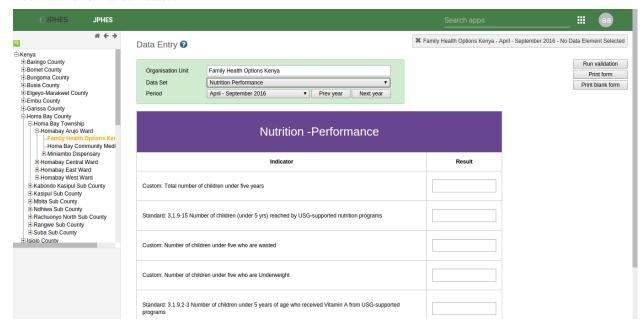


8.1 Data Entry Forms

Below are sample screenshots for different data entry forms;

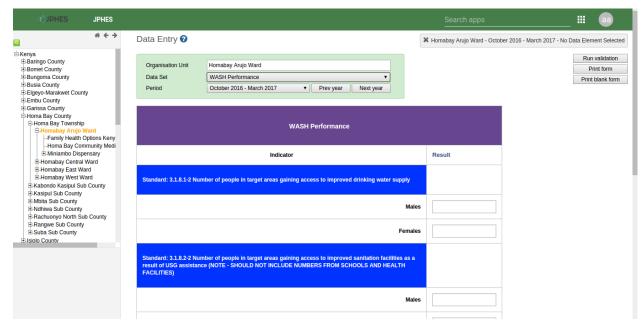
8.2 1. Facility Level

Nutrition Performance Dataset



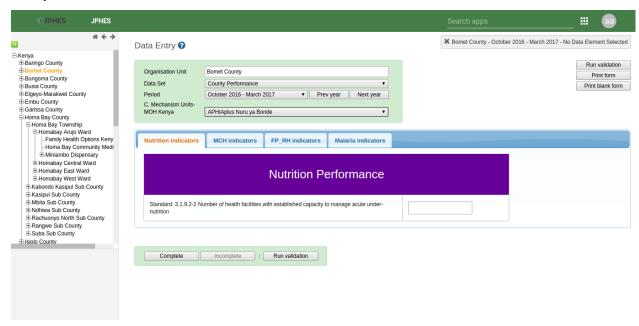
8.3 2. Ward Level

Wash Performance Dataset



8.4 3. County Level

County Performance Datasets



8.3. 2. Ward Level 35

8.5 4. National Level

National Peformance Datasets



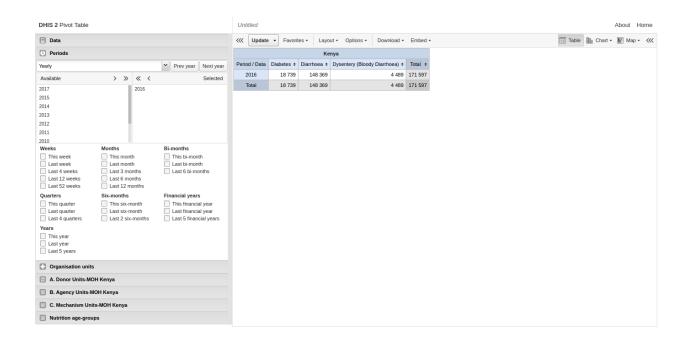
Analysis and Reports

9.1 Pivot Table Analysis

The pivot table app enables users to create pivot tables, using all available data dimensions in JPHES. A pivot table is a dynamic tool for data analysis which lets you quickly summarize and arrange data according to its dimensions. Examples of data dimensions in JPHES are data dimension itself (e.g data elements, indicators and events), periods (representing the time period for which the data represents) and the organisational hierarchy (representing the geographical location of the data). From these dimensions you can freely select dimension items to include in the pivot table. Additional dimensions can be created in JPHES, using the group set functionality, to allow for different aggregation pathways, such as aggregation by "Partner" or facility type. A pivot table can arrange data dimensions on columns, rows, and as filters. When you place a data dimension on columns, the pivot table will display one column per dimension item. If you place multiple data dimensions on columns, the pivot table will display one column for all combinations of the items in the selected dimensions. When you place a data dimension on rows, the pivot table will display one row per dimension item in a similar fashion. The dimensions you select as filters will not be included in the pivot table, but will aggregate and filter the table data based on the selected filter items. The work-flow for creating a simple pivot table is:

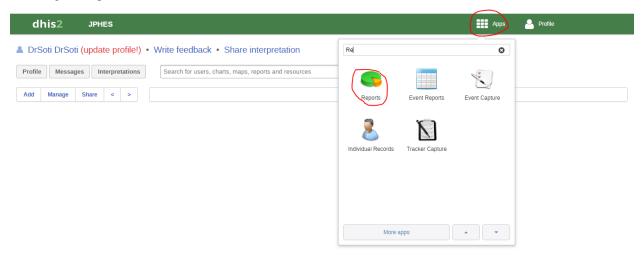
- Select dimension items in the left menu, for instance a few data elements or indicators.
- Click "Layout" on the top menu and arrange the data dimensions as columns, rows, and filters. You can leave the selection as it is if desired.
- · Click "Update".

A pivot table similar as below will be displayed. Notice how indicators are listed on columns and periods as rows.



9.2 Reports

Reports functionality can be accessed by clicking on Apps -> More apps -> Reports or by clicking on Apps then searching for Reports on the search bar.



There are two main types of reports than can be generated from JPHES; Dataset Reports and Standard reports:

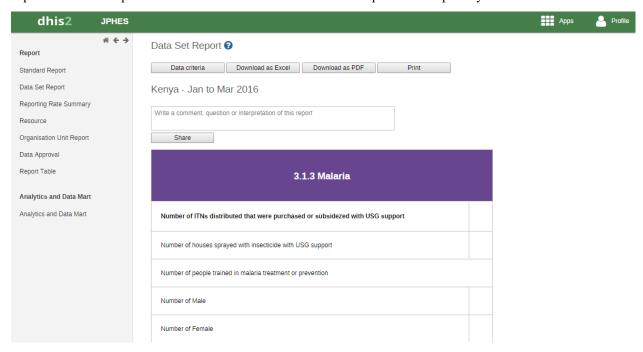
9.2.1 Dataset Reports

Dataset reports are printer friendly views of the data entry screen filled with either raw or aggregated data. These are only available for data sets that have custom data entry forms and not for default or section forms. You can access data set reports from *Apps->Reports*. A Criteria window will appear where you fill in the details for your report:

• Dataset: The data set you want to display.

- **Reporting period**: The actual period you want data for. This can be aggregated as well as raw periods. This means that you can ask for a quarterly or annual report even though the data set is collected monthly. A data set's period type (collection frequency) is defined in data set maintenance. First select the period type (Monthly, Quarterly, Yearly etc.) in the drop down next to Prev and Next buttons, and then select one of the available periods from the dropdown list below. Use Prev and Next to jump one year back or forward.
- Use data for selected unit only: Use this option if you want a report for an orgunit that has children, but only want the data collected directly for this unit and not the data collected by its children. If you want a typical aggregated report for an orgunit you do not want to tick this option.
- **Reporting Organisation unit**: Here you select the organit you want the report for. This can be at any level in the hierarchy as the data will be aggregated up to this level automatically (if you do not tick the option above).

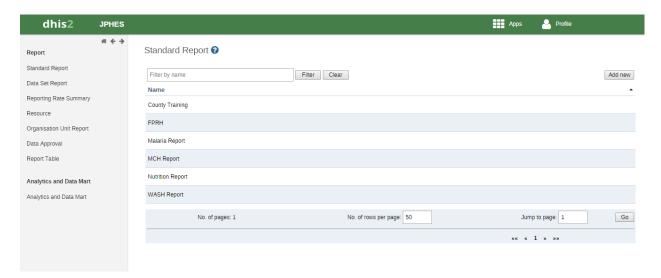
When you are done filling in the report criteria you click on **Generate**. The report will appear as HTML in a printer-friendly format. Use the print and save as functions in the browser to print or save (as HTML) the report. You can also export the data set report in Excel and PDF formats. Below is a sample dataset report layout:



9.2.2 Standard Reports

You access the available reports by navigating to Apps->Reports. In the report menu in the left bar, click Standard Report. A list of all pre-defined reports will appear in the main window.

9.2. Reports 39



You run/view a report by clicking on the name of the report and then selecting "Create" from the contextual menu. If there are any pre-defined paramaters, you will see a report parameter window where you must fill in the values needed for organit and/or reporting month, depending on what has been defined in the underlying report table(s). Click on "Get Report" when you are ready. The report will either appear directly in your browser or be available as a PDF file for download, depending on your browser settings for handling PDF files. You can save the file and keep it locally on your computer for later use.

Data Approval

10.1 How to Approve data

1. On the search menu select the reports App, then click on the Data Approval link on the side menu.

Note: Only CoPs have approval permissions in the platform.

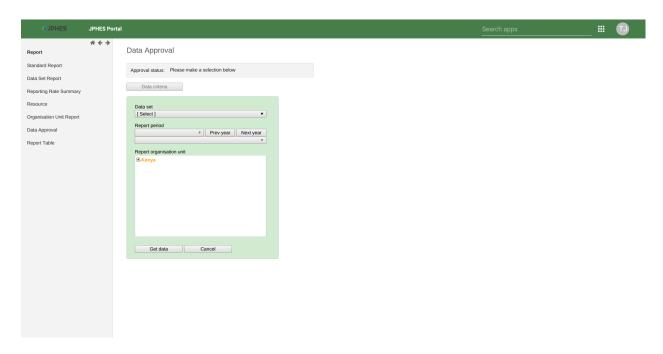


Fig -Data Approval Page.

2. Select a data set to approve, the period(based on the reporting period of the data set) and then Kenya(Represents Mechanism level).

Note: If the **reporting organisationunit hierarchy** does not appear on the data approval page. Navigate to **data entry app** and search for any facility on the search menu. Once the hierarchy appears on the data entry screen go back to data approval page, and the hierarchy should appear. *It's an issue of browser caching, to be fixed soon.*

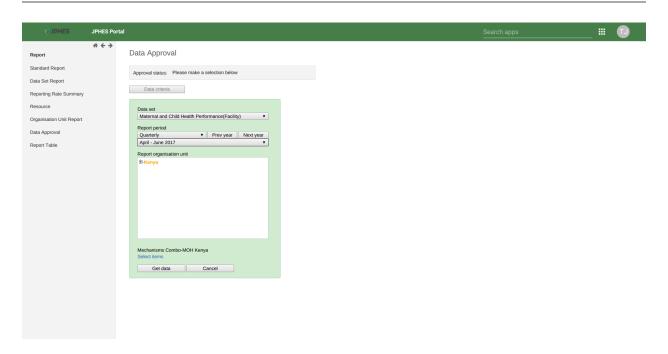


Fig -Selecting Options(Data Set, Period and Kenya-Mechanism level)

3. Then click on the mechanism combo (select items) to select your mechanism on the pop-up menu.

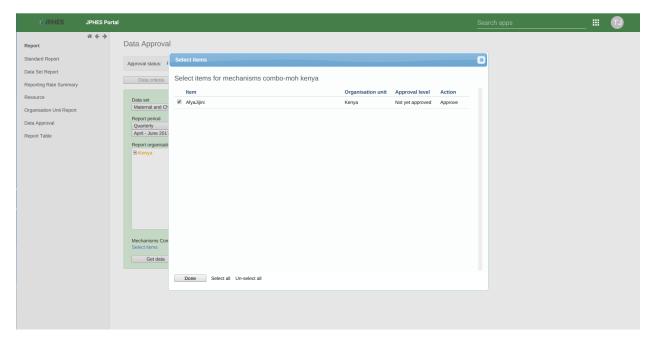


Fig -Selecting mechanism on the pop-up menu.

3. Lastly, click on **Get data button** to generate and display the data set report based on your selected options. Confirm the values on report and click **Approve** if they're okay.

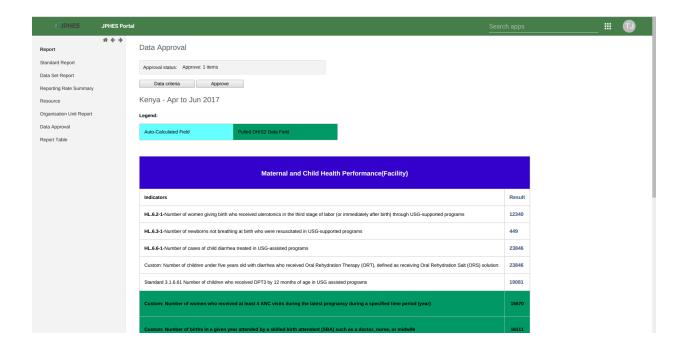


Fig -Data Set report to approve.

Note: Once a data set report for a specified period is approved no updates can be done on the data. To make updates the data set report should be unapproved first.

ServiceDesk Support

Have any queries or require any support? Let us know via the service desk.

11.1 To Access JPHES Support

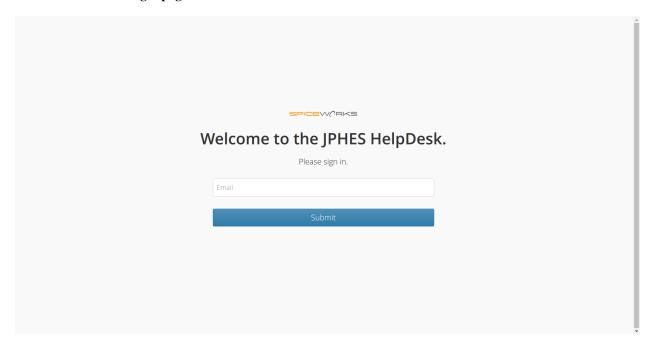
There are two ways of accessing the JPHES Servicedesk portal:

- 1. On the JPHES landing page, click on the JPHES support icon.
- 2. When logged in JPHES Portal, search for JPHES Support App and click on it.



F.g - JPHES Apps - (Support, Landing page, Documentation)

JPHES Servicedesk login page



F.g - Login Page.

11.2 To Login

To create a ticket on the portal, you'll have to login.

- To login simply enter your email address (preferably work emailaddress), and click on the submit button.
- A login link will be sent to your email address.
- Login to your email, and open the email from JPHES Support (inside the mail sent).
- Click on the link to login to the portal.
- It will redirect you to the JPHES Support page.

F.g - JPHES Support Login link sent to your email after submitting your email.

F.g - Sent Email with the login link.

F.g - JPHES Support page (when logged in).

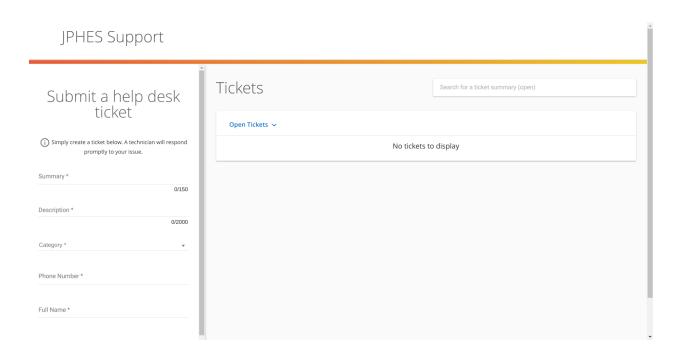
11.3 What you can do?

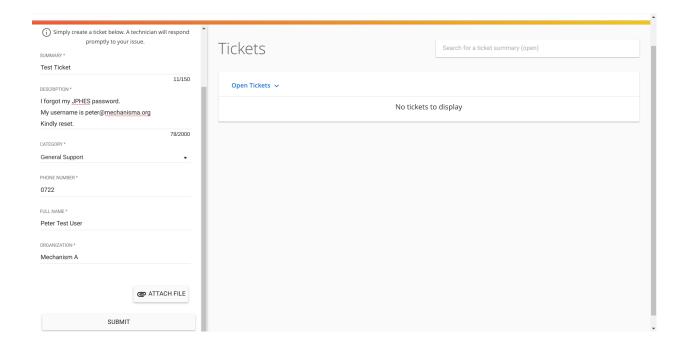
Once you have logged in, there are serveral things you can do:

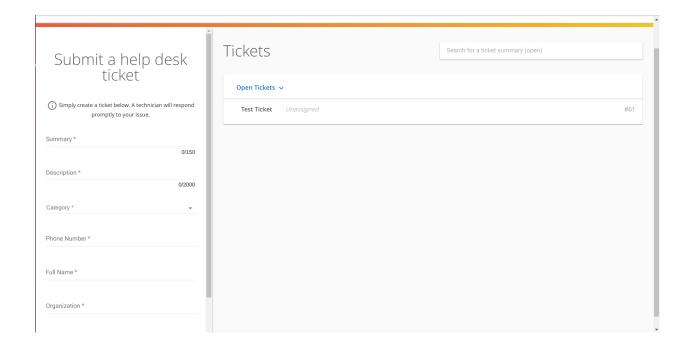
- · Create an new ticket.
- Relply to a response of an an earlier ticket.
- Close a ticket, if you're satisified with the response.
- · Access all tickets you have raised and their status.





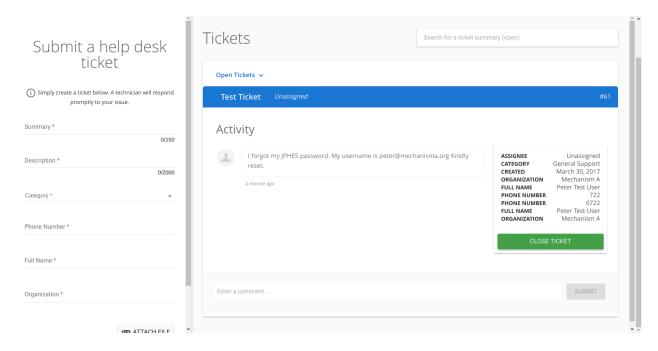




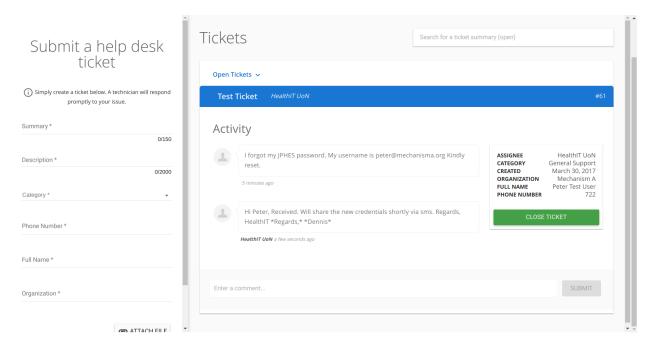


F.g Creating a ticket.

F.g List of tickets. (NB. Filter by status-Open or Closed).

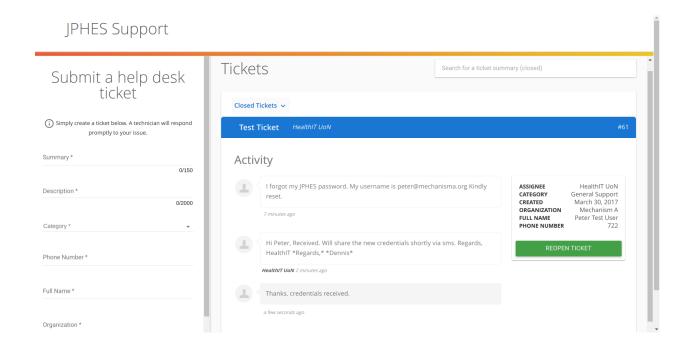


F.g Ticket Detials.



F.g Ticket Response.

F.g Closed Ticket.



Appendix

12.1 System References

- 1. The DHIS2 user manual
- 2. The DHIS2 Implementer Guide
- 3. The Consistency and Concurrency Between the KePMS and DHIS2
- 4. JPHES Core Source Code

12.2 Reporting Guidelines

- 1. Indicator Narrative Revision (23rd March2017 (Archived)
- 2. Indicators Narrative (Summarized Rev. May2017) (Archived)
- 3. Indicators Narrative (Detailed Rev. May2017) (Archived)
- 4. FH Indicator and Data Source List (Rev. March2018 Latest) (Updated 28/01/2020)
- 5. Average FP Stockout Rate_PPR Indicator Brief (22/11/2019) (New)
- 6. FH Indicator, Data Source and Description (17/08/2021 Latest) (New)
- 7. FH Indicator and Data Source Presentation (Rev. August2021 Latest) (New)

12.3 Reporting Timelines

Activity	Period
Performance Data Entry	5th - 18th of Every End of Quarter
KHIS-PHES Data Pull and Attribution	18th of Every End of Quarter
Narrative Reporting	19th-22nd of Every End of Quarter
USAID Data Review and Clarifications	22nd-30th of Every End of Quarter
Data Submission-(Approval)	30th of Every End of Quarter
Reporting Closure	30th of Every End of Quarter

12.4 Presentations and Other Resources

- 1. PHES-Data Management (Panafric Presentation) 10/02/2017
- 2. PHES Resources (23-24) March 2017 Training
- 3. PHES Review Presentation 23rd June 2017
- 4. PHES-Training Program (18th and 19th Jan 2018)
- 5. PHES-Training Presentation (18th and 19th Jan 2018)
- 6. Online Learning
- 7. IPSL Template (19th Jan 2019)
- 8. Family Health APR Meeting-JPHES Presentation(27th and 28th Nov 2018)-
- 9. FH Indicator, Indicator Descriptions and Data Source Presentation (August2021 Latest)
- 10. PHES Important Documents shared in 2021

12.5 Data Import API

- JPHES Data Import API Tutorial (PDF)
- Data Import Template and Sample(XLSX)

12.6 Reporting Status Monitor & Data Approval

- · Reporting Status
- Data Approval Status

12.7 IPSL

- IPSL 2021Q3- HTML View (Latest 01st July 2021)
- IPSL 2021Q3 CSV (Latest **01st July 2021**)