HMIS MANAGERS’ MANUAL

User Manual for Web Portal & DHIS2
**Foreword**

One of the major contributions of NRHM has been to put in place a nationwide HMIS. Currently, on a monthly basis we are gathering reports from over 643 districts. The quality of data reported has also been increasing over the last two years. The challenge now is to make the information available to Programme Managers, and help them to use it for improving service delivery and health outcomes.

This training programme integrates theory with practice. The first of these manuals is meant for use by every service provider who is gathering and reporting data. Similarly all other Programme Managers and HMIS Managers would also need to be familiar with basic definitions of the data elements. The second manual is for the Health Programme Managers to use this information more effectively in managing the programmes.

Further manuals are available as soft copies for use of web portal and under development for HMIS resource persons. We hope that these manuals are used extensively to train our Service Providers and Programme Managers so that data quality and reliability of data improve significantly.

I thank the entire HMIS team of M&E Division of MOHFW and the team of NHSRC for their efforts in bringing out these manuals. We look forward to suggestions and corrections, if any, so that successive editions on these manuals can be improve.

Mrs. Madhubala
Additional Director General
Ministry of Health & FW
**Acknowledgements**

NHSRC would like to thank HMIS professionals across the country who have provided valuable contributions to the development of this training manual. HMIS experts at MoHFW, HISP, and JICA are especially acknowledged for giving momentum to this endeavour. In particular we acknowledge the contributions of:

Mrs. Madhu Bala, Additional DG (Statistics), MoHFW  
Dr. Ratan Chand, Chief Director, M&E Division, MoHFW  
Shri. Pravin Srivastav, Director, M&E Division, MoHFW  
Dr. Upma Sharma, Social Scientist, Data Triangulation Cell, MoHFW  
Ms. Ritu Arora, Project Co-ordinator, Data Triangulation Cell, MoHFW  
Prof. Sundeep Sahay, Professor-Health Informatics, University of Oslo (Former Advisor-NHSRC)  
Mr. John Lewis, Consultant, HISP-India  

Ms. Richa Som, Consultant, JICA  
Dr. Aboli Gore, Consultant, JICA  

Dr. Sandhya Ahuja, Sr. Consultant-HMIS, NHSRC  
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Dr. Ekta Saroha, Sr. Consultant-HMIS, NHSRC  

NHSRC Consultants & Fellows  

Many other public health professionals have time and again shared their knowledge and expertise to strengthen HMIS in the country and we greatly acknowledge their contribution and regret our inability to name all of them.

Users of this manual are not perceived as mere recipient of information; we encourage them to contribute to the development of knowledge and science of HMIS. We request all readers who notice any discrepancies to provide us suggestions for improvement. Vision of HMIS goes far beyond mere collection and analysis of data…we envision data to guide our programmes and policies for the promotion of health for all.
Dr. T. Sundararaman
Executive Director
National Health Systems Resource Centre
January 2011
Preface

These training manuals are essential to take HMIS in our country to next higher level of quality and effectiveness. The training programme that is being implemented is competency based. For an effective HMIS, the system as a whole requires to have proficiency in eight broad competency areas. These eight areas could be listed as follows:

1. Understanding of data elements.
2. Understanding of indicators and the interpretation of data.
3. Understanding of data quality and its determinants
4. Use of information for health planning and monitoring.
6. Use of other applications deployed at District and State level that could also feed in National Portal.
7. Design issues that underlie choice of indicators, architecture of the system, and methods of HMIS evaluation.
8. Abilities to customize applications to suit local needs, to define programming requirements and programming skills.

This set of 4 manuals covers all the above competencies except the last one.

Volume 1 – Service Provider Manual: This deals with the first competency alone, and is meant for use by everyone in the system. This module is taught to all those gathering and reporting data, the training load is highest for this manual.

Volume 2 – Health Programme Managers’ Manual: This deals with the use of indicators, and with the understanding and troubleshooting of data quality issues. This manual is essential for all Block, District and State level Programme Managers who are associated with RCH and NRHM programme management in anyway.

Volume 3 – HMIS Managers’ Manual: This is essential for only those who enter data and those who seek to access the databases to download data and do their own analysis. It is essential reading for HMIS Managers. This would cover competencies 5 and 6 listed above.

Volume 4 – HMIS Resource Person Manual: This is more conceptual and deals with larger design issues and theoretical frameworks of understanding. It would be an essential reading for those involved in HMIS design, software development or for those writing a tender document, or for those who are constructing a State level training programme or evaluating HMIS systems.

Though these manuals are best understood when transacted in a workshop, it could also be used as a ready reference material for Programme Managers at all levels.

Underlying these four manuals is one fundamental understanding which is crucial to the success of HMIS, viz. HMIS works best when used as a tool of decentralized participatory health planning and management. Currently we have published only the first two volumes. The other two, under development are currently available as soft copies for those who need it.
ABBREVIATIONS

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<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
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<tr>
<td>AEFI</td>
<td>Adverse Event following Immunization</td>
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<tr>
<td>ANC</td>
<td>Antenatal Care</td>
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<td>ANM</td>
<td>Auxiliary Nurse Midwife</td>
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<tr>
<td>APL</td>
<td>Above Poverty Line</td>
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<tr>
<td>ASHA</td>
<td>Accredited Social Health Activist</td>
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<tr>
<td>AWW</td>
<td>Anganwadi Worker</td>
</tr>
<tr>
<td>AYUSH</td>
<td>Ayurveda, Unani, Siddha, and Homoeopathy</td>
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<tr>
<td>BCC</td>
<td>Behaviour Change Communication</td>
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<tr>
<td>BCG</td>
<td>Bacillus Calmette Guerine</td>
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<tr>
<td>BP</td>
<td>Blood Pressure</td>
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<tr>
<td>BPL</td>
<td>Below Poverty Line</td>
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<tr>
<td>CHC</td>
<td>Community Health Centre</td>
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<tr>
<td>DH</td>
<td>District Hospital</td>
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<td>DHIS</td>
<td>District Health Information Systems</td>
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<td>DHQ</td>
<td>District Headquarters</td>
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<td>DLHS</td>
<td>District Level Household Survey</td>
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<tr>
<td>DPM</td>
<td>District Programme Manager</td>
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<tr>
<td>DPT</td>
<td>Diphtheria, Pertussis, Tetanus</td>
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<tr>
<td>FP</td>
<td>Family Planning</td>
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<tr>
<td>HISP</td>
<td>Society for Health Systems Project</td>
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<tr>
<td>HIV</td>
<td>Human Immuno Deficiency Virus</td>
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<td>HMIS</td>
<td>Health Management Information Systems</td>
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<td>HPS</td>
<td>High Performing State</td>
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<tr>
<td>ICT</td>
<td>Information, Communication, and Technology</td>
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<tr>
<td>IFA</td>
<td>Iron and Folic Acid</td>
</tr>
<tr>
<td>IMR</td>
<td>Infant Mortality Rate</td>
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<tr>
<td>IOL</td>
<td>Intra Ocular Lenses</td>
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<tr>
<td>IPD</td>
<td>Inpatients Department</td>
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<tr>
<td>IUD</td>
<td>Intrauterine Device</td>
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<tr>
<td>Abbreviation</td>
<td>Full Form</td>
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<tr>
<td>JSY</td>
<td>Janani Suraksha Yojana</td>
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<tr>
<td>LBW</td>
<td>Low Birth Weight</td>
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<tr>
<td>LPS</td>
<td>Low Performing State</td>
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<tr>
<td>M&amp;E Officer</td>
<td>Monitoring and Evaluation Officer</td>
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<tr>
<td>MMR</td>
<td>Maternal Mortality Ratio</td>
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<tr>
<td>MMR</td>
<td>Measles, Mumps, and Rubella</td>
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<tr>
<td>MO</td>
<td>Medical Officer</td>
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<tr>
<td>MOHFW</td>
<td>Ministry of Health and Family Welfare</td>
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<td>MPW</td>
<td>Multi Purpose Worker</td>
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<tr>
<td>MTP</td>
<td>Medical Termination of Pregnancy</td>
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<td>NFHS</td>
<td>National Family Health Survey</td>
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<td>NRHM</td>
<td>National Rural Health Mission</td>
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<tr>
<td>NSV</td>
<td>Non Scalpel Vasectomy</td>
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<tr>
<td>OPD</td>
<td>Out-Patient Department</td>
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<td>OPV</td>
<td>Oral Polio Vaccine</td>
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<tr>
<td>OT</td>
<td>Operation Theatre</td>
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<tr>
<td>PHC</td>
<td>Primary Health Centre</td>
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<tr>
<td>PNC</td>
<td>Post Natal Care</td>
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<tr>
<td>PNMR</td>
<td>Peri-Natal Mortality Rate</td>
</tr>
<tr>
<td>RKS</td>
<td>Rogi Kalyan Samiti</td>
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<tr>
<td>RTI</td>
<td>Reproductive Tract Infection</td>
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<tr>
<td>SBA</td>
<td>Skilled Birth Attendant</td>
</tr>
<tr>
<td>SC</td>
<td>Sub-Centre</td>
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<tr>
<td>SDH</td>
<td>Sub-District Hospital</td>
</tr>
<tr>
<td>SRS</td>
<td>Sample Registration Survey</td>
</tr>
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<td>STI</td>
<td>Sexually Transmitted Infection</td>
</tr>
<tr>
<td>TT</td>
<td>Tetanus Toxoid</td>
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<tr>
<td>VDRL</td>
<td>Venereal Disease Research Laboratory</td>
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<tr>
<td>VHND</td>
<td>Village Health and Nutrition Days</td>
</tr>
<tr>
<td>VHSC</td>
<td>Village Health and Sanitation Committee</td>
</tr>
<tr>
<td>WHO</td>
<td>World Health Organization</td>
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1. Introduction

Recognizing the importance of Health in the process of economic and social development and improving the quality of life of our citizens, the Government of India has resolved to launch the National Rural Health Mission to carry out necessary architectural correction in the basic health care delivery system.

The NRHM covers the entire country, with special focus on 18 states where the challenge of strengthening poor public health systems and thereby improve key health indicators is the greatest. These are Uttar Pradesh, Uttarakhand, Madhya Pradesh, Chhattisgarh, Bihar, Jharkhand, Orissa, Rajasthan, Himachal Pradesh, Jammu and Kashmir, Assam, Arunachal Pradesh, Manipur, Meghalaya, Nagaland, Mizoram, Sikkim and Tripura.

The NRHM is basically a strategy for integrating ongoing vertical programmes of Health & Family Welfare, and addressing issues related to the determinants of Health, like Sanitation, Nutrition and Safe Drinking Water. The National Rural Health Mission seeks to adopt a sector wide approach and aims at systemic reforms to enable efficiency in health service delivery. NRHM subsumes key national programmes, namely, the Reproductive and Child Health II project, (RCH II) the National Disease Control Programmes (NDCP) and the Integrated Disease Surveillance Project (IDSP). NRHM will also enable the mainstreaming of Ayurvedic, Yoga, Unani, Siddha and Homeopathy Systems of Health (AYUSH).

While providing a broad framework for process of activities, NRHM lists a set of core and supplementary strategies to meet its goals.

Core strategies of NRHM include: Decentralized village and district level health planning and management, appointment of Accredited Social Health Activist (ASHA) to facilitate access to health services, strengthening the public health service delivery infrastructure, particularly at village, primary and secondary levels, mainstreaming AYUSH, improved management capacity to organize health systems and services in public health, emphasizing evidence based planning and implementation through improved capacity and infrastructure, promoting the non profit sector to increase social participation and community empowerment, promoting healthy behaviours, and improving intersectoral convergence. Supplementary Strategies include regulation of the private sector to improve equity and reduce out of pocket expenses, foster public–private partnerships to meet national public health goals, re-orienting medical education, introduction of effective risk pooling mechanisms and social insurance to raise the health security of the poor, and taking full advantage of local health traditions.
1.1 Overview of HMIS Portal

The HMIS (Health Management Information System) web portal was launched by the Ministry of Health and Family Welfare (MoHFW) on 21st October, 2008 to enable capturing of public health data from both public and private institutions in rural and urban areas across the country. The portal is envisaged as a “Single Window” for all public health data for the Ministry of Health and Family Welfare. The MoHFW initially rolled out the HMIS up to the District Level and now being expanded to the Sub District/Block level facility wise data entry. Over 630 Districts are reporting their monthly performance on a regular basis.

1.2 Objectives

The System has been developed with the following aims:

- To enable the data entry at Facility, Sub-District, District, State & National Levels.
- To enable user to preview, compare, modify and forward data to the next level.
- The data stored by using the Data Entry Application would be transformed and loaded into data marts which will be used for Statistics, Analytical & Ad-hoc reporting.
- To consolidate the data entered at facility, sub-district level/block, district level, at the state level and further at national level and store it into the central database.

1.3 System Overview
The Web Based Data Entry Application is for the capturing of data regarding public health sector in India. A well-designed database has been used in this application for storage of data.

The application comprises of the following modules:

1. MIS  
2. Finance  
3. Infrastructure  
4. NVBDCP  
5. Reports  
6. Standard Reports  
7. Masters  
8. Compilation

Note: To run the application Internet Explorer 6.0 or above is required.

1.4 Hardware Requirements

1. Desktop (Intel Pentium or higher processor)  
2. 256 MB DDR II RAM 533 MHz 20 GB HDD  
3. Monitor with 1024x768 resolution  
4. FDD  
5. Scroll Mouse  
6. Network Connectivity  
7. Keyboard

1.5 Software Requirements

1. Microsoft Windows OS-98/2K/ME/XP  
2. Internet Explorer 6.0 or above.

2. HMIS Portal

HMIS portal is a reservoir of health related information of Ministry of Health & Family welfare. It is divided into two domains; Public and Secured. The information available in the public domain is accessible to all and anyone can view and download the reports in this section. The information in the secured domain is accessible to a selected set of users of HMIS Portal. This is secured by a user ID and password provided by GoI. The secured domain is for the Block/District/State and National Level users, to enter and view the data.

Steps to log in to the application:

STEP 1: Select the Internet Explorer from the “Start” menu to open the explorer window.  
STEP 2: Specify the URL of the application at the address bar of the explorer window and click Go to open the login page.

2.1 Public Domain
2.2 Secured Domain

STEP 1: Click on the **HMIS Data Entry Login** option on the left panel.

STEP 2: Enter valid **User Name** and **Password** in the respective textboxes.

STEP 3: Click on the **Login** button to open the Home Page of the application.

2.3 Flow of Data
The normal flow of data in most of the states follows the bottom up approach. The Sub-Centre (SC/HSC) reports to PHC, the PHC to CHC and the CHC to SDH/District Hospital. District Hospital reports to District HQ which then collates the data and sends to the State HQ.

But the reporting pattern in varies from state to state. At some of the states data is collected at the CHC level, whereas in some states the Block HQ collates the data and sends to District HQ. In order to make the system flexible enough for all the states without much complexity, the concept of data aggregation unit was devised.

**Data Aggregation Unit** is the place where the data is collected and consolidated. It can be a District HQ, Block HQ, Sub-Divisional Hospital, District Hospital, CHC or even a PHC. For any place to be a data aggregation unit certain basic requirements like, availability of Computers, Internet, and Trained Personnel – Nodal M & E Officers should be fulfilled.
The system can be further customized according to the state/district requirement. Once the Data Aggregation Unit is identified, the Mapping of Health facilities need to be done and accordingly the Facility Master is to be updated.

Note: The DPM, DAM, DDM should have interchangeable roles, so that data reporting does not suffer

2.4 Modes of Data

The modes of data are the Simulation of the existing submission of forms/flow of information, where the information flows from bottom to top. Once data is committed to the next level use cannot modify the data. The various modes of data are Draft Mode, Forward Mode and Committed mode.

**Draft Mode:** While the Sub-District/ District/ State level user is entering the data, it is in the **Draft mode**.
Here the user can make modifications as many times as possible. The other users at the next higher level can view the data, but cannot make any modifications in the data. The draft data at the sub-district level is called Sub-District Draft, for District Level it is called District Draft and at the state level it is called State Draft.

<table>
<thead>
<tr>
<th>Action</th>
<th>Sub District</th>
<th>District</th>
<th>State</th>
<th>Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Modify</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Provisional Reports</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
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</table>

**Forward Mode:** Once the user is confirmed the data entered is complete and correct, the data is forwarded to the next level, which is called as **Forward Mode**.
### Sub District Forward Mode

<table>
<thead>
<tr>
<th>Action</th>
<th>Sub District</th>
<th>District</th>
<th>State</th>
<th>Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Modify</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Provisional Reports</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

### State draft Mode

**Commit Mode:** Once the data is committed by the user, the data cannot be further modified by that level of user until/unless reset back to the draft mode by the upper level.

### Committed Mode

Data can be checked at the various levels i.e. District, State, PRCs, RDs, and National, but cannot be modified by anyone except the Originator, who enters the data as reported in the records at the facility. The modes of data are designed so that the ownership of data resides with the Data Originator.

### 3. Portal Navigation

#### 3.1 Navigation in Public Domain

This section takes through the Information on the Public domain which is accessible to all. The **home page** shows all major links of public domain as discussed below and the login domain (links of HMIS data entry portal and Training web portal)
Public domain provides information on

1. Latest news/updates on portal
2. Contact details. For any queries, feedback, errors, help and information on HMIS one can contact at hmis-nrhm@nic.in all the queries are replied between 48 working hours.
3. Left panel incorporates links to provide information on NRHM, to enter the login domain of the HMIS portal, to generate the reports on HMIS data and publications. The links includes publications, reports, notifications, M&E activities and HMIS secured log-in tabs.

Top panel includes the links for downloads, Links to related websites of Ministry of Health, Photo gallery and link to home page. All the reports /formats can download from the portal. The About us page briefs about NRHM, information on it’s mission, main focused states and the HMIS portal. It also gives a lead to important websites of Ministry of health and Family welfare, namely National Rural Health Mission, Health Activities, and Family Welfare Activities Department of AYUSH
HMIS Data Entry Log-in link takes to the secured login domain of HMIS portal. Only authorized users who are provided user ID and password can enter this domain.

This is for the data entry by the state/districts(blocks). Here the user can enter, modify, view, compare the data, Generate various reports and graphs for analytical purposes, View performance of the states w.r.t various important data items, View the status of states/districts/facility on submission of data.

1. HMIS Data Entry Log-in
2. HMIS Training Web Portal

HMIS Data Entry Log-in link takes to the secured login domain of HMIS portal. The passwords should be at least of 8 characters, of which 1 should be number (0-9), & 1 special character (!,@,#,$,%)
Data entry by the user can be done for their own state/district/block/facility only. No user can enter or view data for any other district or state. The permission to modify data is rests with the Data Originator (District/Block/facility). Even the state can’t modify data entered by their districts blocs. State is provided with the facility to reset data, forwarded by districts.

HMIS training web portal link takes the user to training portal, which is used for training purposes and is an exact replica of the main portal.

The background colour of the training web portal is beige instead of blue. The user id and the password are the same as on the live portal. Any data entry made in the training portal will not be seen in the live portal thus not affecting the data on live portal. For analysis and practice the past data is also uploaded on this portal and is updated from time to time.
The username & passwords are same as in the main portal. In case the user has changed the passwords in one of the log-ins (e.g. in training portal) and not changed in the other (main portal) then the passwords may not be same.

**Note:** It is advisory for all users to remember and enter the respective username and password correctly to access the system.

The **Periodic Reports** section provides the user the following

1. **Compiled Reports from HMIS Portal** - This contains the First published report though HMIS data, RCH, FMR and NRHM Reports.
2. **Dynamic Reports from HMIS Portal** – With this option dynamic report can be generated directly from the database for data committed by states.
3. **Demographic and Vital Indicators** – This has information on SRS bulletin, population projection, Time series, district wise population projection from UNFPA, CBR, CDR, IMR & TFR estimates and many more.

**Note:** All the reports are Downloadable.

**Publications** section contains the various publications of statistics division of Ministry. The publication are categorized as Survey Reports – like NFHS and DLHS reports, Statistical Publications, RHS, Family Welfare Statistics in India 2006, Other Important Publications from other sources like World bank, WHO, RGI etc.
M&E Activities section provides information on the monitoring and evaluation of the National Family Welfare Programmers’ which is done by Statistics division of MoHFW. The Activities of Statistics Division – including activities undertaken and envisaged are included here. Also the workshops consultations and any important presentations are also included here for the user to get benefited.

The M&E Division undertakes concurrent evaluation of the NRHM. It contains all information like letters, schedules, ToR, Directory of Agencies, User manuals etc regarding the CE activity.
Notification section contains all the Letters sent to State Governments from the statistics division of ministry regarding HMIS.

The home link available at the top panel takes to the home page of the portal.
The photo gallery has various photos taken under NRHM programme. Feedback section provides the user a means to give feedback and suggestions regarding the HMIS portal.
Links section contains the links to important websites related to Health & Family welfare, Government bodies, International Agencies and Development Partners.

Other than HMIS formats all mentioned links can be directly downloaded and used.

**HMIS formats** include Monthly, Quarterly and Annual formats. Reporting Forms can be categorized into three levels as: Forms to be submitted by States/ UTs to Government of India, Forms for use within States for internal reporting, Facility Level Forms for internal reporting. These forms can be downloaded as required and saved for future use.

These forms serve as a template for offline entry of data and then uploading the data at the required time.

Always download the latest template to upload data on the portal.
3.2 Navigation in Secured Domain

The secured domain is for the State, District, Sub-District and National Level Users and can be accessed with assigned user ID and a password only.

The home page of secured domain has messages for the user. On the top there are various tab for updating/viewing data.

**MIS** option is for *MIS data entry*, which is divided in Monthly, Quarterly and Annual formats. The monthly formats are to be filled by the facilities and district HQ. The Quarterly and Annual has to be filled by the District and State on quarterly and annual basis respectively.

**Step 1:** to enter data in monthly format click MIS-> Monthly.
Finance option is for entering data in FMR. Finance data is to be entered on a Quarterly basis by Districts and State.

Infrastructure option is for entering the data related to infrastructure. This has to be entered on an annual basis.
Reports tab is for generating the various reports from the HMIS portal. The reports can be viewed based on the log-in user privileges. The state user can view reports for all the districts in his state, but can’t view the reports for other states. Similarly, a district user can view reports of the respective district as well as the report of the sub-districts and blocks under him, but can’t view the report of other districts. A National level user can view reports for all the states, districts, sub-districts.

The reports under this section are generated dynamically from the database.

Standard reports are a collection of reports generated through portal, but of static nature. These are updated from time to time. These are those reports which take a lot of time for generation through portal.
Change credential option is to update the details of the user, so that in case of need or any information they could be contacted.

Change password option is for changing the password assigned to the user. The password provided needs to be entered in the Old password box and the new password has to be entered. The password should be minimum of 8 characters with 1 special character (! @#$ %^&*) and 1 number (1234567890).

In case of loss of password you can send a new password reset request to hmis-nrhm@nic.in
4. Data capturing on HMIS portal

The data entry is done in two modes; Online and Offline. In the Online mode user logs in to the portal, selects the options and enters the data in the form on the portal and saves it. Here constant internet connectivity is required. Where the internet connectivity is a problem, but computers are available, user can download the respective form, enter the data in the form and upload it from any other location to the portal. This is uploading data in the Offline mode.

For data entry, modification and view the reports, different type of users are created. Each User has distinctive rights and is not shareable by other users. The users are as following:

1. Facility level User
2. Sub-district/Block User
3. District User
4. State User
5. National User
6. Read Only User

**Facility Level User:** The facility level users can Enter/View/Modify the data for their respective facility only. The facility level reporting is monthly, which has to be filled by 5th of every month. They cannot view the data for facilities other than their own. Once the facility level user forwards the data to Sub-District/ Block level user then the modification in the record is not possible unless set back to draft mode.

**Sub-District/Block Level user:** The Sub-District/Block Level Users can Enter/View/Modify data for the facilities which are in their Sub-District/Block/ Taluka only. Once the Sub-District/Block Level User forwards the records to the District Level user then the records no longer remain modifiable from his end. The records remain available for viewing at his end though.

**District Level user:** The District Level Users can add/modify data record(s) from the database about
his district only. Once the District Level User forwards the records to the State Level user then the records no longer remain modifiable from his end. The records remain available for viewing at his end though. District level user can view data for all of the sub-district/ blocks and facilities in the respective district.

**State Level user:** The State Level Users can add/modify data record(s) from the database about his State only. The records that are available to a State Level User are either that he added by himself or that were added by the District Level User. All the records that are entered and saved by the State Level User are available to him for modifying until he forwards them to the National Level User. Once the State Level User forwards the records to the National Level User then the records no longer remain modifiable from his end. The records remain available for viewing at his end though. State level user can view data for all of the District/ Sub-District/ Blocks and Facilities in the respective district.

**National Level User:** The National Level Users can view data record(s) from the database for all the States. National level users cannot modify or enter data, but view various reports only for administration and validation purposes.

### 4.1 Application Interface & Navigation

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<thead>
<tr>
<th>Interfaces</th>
<th>Meaning</th>
<th>Description</th>
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<tbody>
<tr>
<td>Show/Plus Icon</td>
<td></td>
<td>Displays/Unfolds the sub-menu items placed under the current menu item.</td>
</tr>
<tr>
<td>Hide/Minus Menu Icon</td>
<td></td>
<td>Hides/Folds the sub-menu items under the current menu item.</td>
</tr>
<tr>
<td>Hide link</td>
<td>Hide</td>
<td>Hides the Left Menu.</td>
</tr>
<tr>
<td>Search link</td>
<td>Search</td>
<td>Invokes the application to open the Search form.</td>
</tr>
<tr>
<td>Add New link</td>
<td>AddNew</td>
<td>Invokes the application to open the Add Criteria Search Form</td>
</tr>
<tr>
<td>Search Button</td>
<td>Search</td>
<td>Displays search result, if any that matches the specified search criteria.</td>
</tr>
<tr>
<td>Move Next Button</td>
<td></td>
<td>Saves the details entered in the fields on the Add form.</td>
</tr>
<tr>
<td>Compare Button</td>
<td>Compare</td>
<td>Displays the comparison between the data of the current year and the previous year.</td>
</tr>
<tr>
<td>Preview Button</td>
<td></td>
<td>Enables the user to preview the data.</td>
</tr>
<tr>
<td>Modify</td>
<td></td>
<td>Enables the user to open a record for editing.</td>
</tr>
<tr>
<td>Text Box</td>
<td></td>
<td>Enables user to enter text or modify the displayed text.</td>
</tr>
<tr>
<td>Text Area</td>
<td></td>
<td>Enables user to enter alphanumeric text or modify the displayed text that contains more than 25 words.</td>
</tr>
<tr>
<td>Component</td>
<td>Description</td>
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<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Drop down list</td>
<td>Enables user to select a single item from a list of items.</td>
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<tr>
<td>Radio Buttons</td>
<td>To make a single choice out of all available options.</td>
<td></td>
</tr>
<tr>
<td>Checkbox</td>
<td>To choose more than one option out of all available options.</td>
<td></td>
</tr>
<tr>
<td>Multiple Selection icon</td>
<td>To move all the items from the left list box (List box comprising of complete list) to the right list box (List box comprising of selected items).</td>
<td></td>
</tr>
<tr>
<td>Single Selection icon</td>
<td>To move highlighted item from the left list box (List box comprising of complete list) to the right list box (List box comprising of selected items).</td>
<td></td>
</tr>
<tr>
<td>Single De-Selection icon</td>
<td>To move back the highlighted item from the right list box (List box comprising of selected items) to the left list box (List box comprising of complete list)</td>
<td></td>
</tr>
<tr>
<td>Multiple De-Selection icon</td>
<td>To move back all the items from the right list box (List box comprising of selected items) to the left list box (List box comprising of complete list)</td>
<td></td>
</tr>
</tbody>
</table>

4.2 Data Entry
For data entry in the live portal, click on **HMIS Data Entry Login**. HMIS Training portal login, is for data entry for training purposes.

**Training portal** is exactly like the main portal. The data entered on this portal is not treated as final. The username and passwords are same as in the main portal (unless changed by user on both the portals).
For convenience for user the colour scheme is different in order to distinguish from the main portal. The data for past months entered on the main portal, is also exported here periodically, so it helps the users in getting used to the portal & experimentation.

**Home page** of log-in screen. The urgent messages for the State/District/ Facility users are displayed on the main screen. The home page also displays the user credentials through which the user has logged in; the username, State name, District name, Sub-District name.

**MIS Section** consists of data entry. The facilities has only Monthly format to fill. Click on MIS->Monthly.
The options available for different type of users is different. Like for example at the Facility/Sub-District level only monthly reports are required to be filled in, therefore, the options of quarterly and annual are not available to them. Login would also open the respective forms for the type of user.

4.3 Online data entry

To enter monthly data select year, month and facility type and facility name from the selection box and click on **Move Next**.

The selection moves to the next box. At one time data can be entered for 1 facility and 1 month only.

The data entry screen is made in the same manner as the forms so user can identify with it more easily. Also in the column in blue colour the data for the previous months is displayed.
User can enter data for any section in the box for data against each item. Press “tab” to move to next item. To save data click on “Update” Button.

On the extreme right is the reference number of the monthly consolidated format, as to where the data would be consolidated in the District consolidated report.

Data can also be checked for validation errors also while verifying the data. List of validation errors can be found in the downloads section of the portal. Format has some validation checks which alerts the user from time to time while entering the data.
The error is highlighted in “Red” which goes off as soon as the user corrects the data.

Data can also be checked for validation errors also while verifying the data. List of validation errors can be found in the downloads section of the portal.

4.4 Data uploading in Offline mode

Data can also be entered in offline mode where internet connectivity is a problem. Data is entered in the Excel file, and then this file can be uploaded on portal, wherever the internet is available. Excel file can be downloaded from the portal in the downloads section -> HMIS formats. The sheets are encrypted and do not allow the user to change, delete or modify any items or cells. From the download section in the portal, download the Performa pertaining to the facility that needs to be
entered and save it on disk.

The excel sheet is encrypted and allows user to type in the cells for data entry only. The rows and columns can’t be modified or added. In case the user tries to upload any other sheet, the system won’t accept and would give an error.

![Excel Sheet for data entry](image)

**Note:** You can give any name to the file while you save it. It’s a convenient and a good practice in case it is saved by facility name and month.
The selection of process of Financial year, Month, Performa, facility name is same for offline data entry, as in the Online mode.

Login with your username and password. Goto MIS-> Monthly. Click Add
Select Financial Year, Month and Facility Type and Facility Name -> click on “Move Next”. Click on “Upload Performa/Format” to upload the excel sheet.

A Popup window appears prompting to select the file from the location where it is stored.
File can be stored anywhere on hard-disk, pen-drive, CD, or any other external drive. Select the file from the location it is stored on the hard disk/pen-drive/CD and click on “Upload Excel”.

Note: It is very similar to attaching a file to email.

A confirmation receipt is generated after the data is uploaded. This can be printed or can be saved on the system and used as a proof for uploading the data.
The data is updated in the form and is displayed in the respective cells.

To make changes in the uploaded data at this time, you can change the value and click on the “Update” button on the bottom of the page.

4.5 Searching data

In order to search a pre-existing data file for comparing, modifying and preview data, click on MIS>Monthly.
Click on search option (Green colour tab shows that search option is activated) - Select the year, month, facility type which you want to search for and click on the search. In case you don’t select the year, data for all the years would be displayed, if month is not selected data for all months would be displayed. It’s mandatory to select the fields with “*”, else it will give an error message.

Click on the “+” option below to expand it. This will display data for selection.
4.6 Modifying data

While the data is in draft mode, the modify button is green signifying the data is open for modification. Once forwarded, the modify button turns green and gets deactivated. To make changes, click on Modify.
It takes the user control to the form. Make changes in the data as required and click on Update button to save the changes.

4.7 Checking data

Data can be checked by comparing the data with the previous month’s data. Viewing the data and by generating the validation report.

Difference is highlighted in Green (signifies an increase in value) Orange (a decrease in value)
Preview option displays the data entered by the user for a month.

The **Verify** report displays “Total no of Items” in the format, “Total no of Items having no values”, “Total no of Items having validation errors”, “Total no of RCH Items having No value” or “Zero value”, “Total no of NRHM Items having No value or Zero value”.

These all are displayed in number. On clicking [View Detail] the details are displayed in the panel below.
User can go back to their data and modify the errors and fill in the blank values. This report can be printed.

It is mandatory for the user to view the “verify” report before forwarding the data to state/center and “accept” the validation errors.

4.8 Forwarding data

For forwarding the data to the next level, click on Search -> select the option “Data Forwarding” select “year”, month and format and click-> Search

Click on the “+” sign to expand the data. Click the check box on the data required to be forwarded and click the forward button to forward the data. Data would be forwarded to the next level i.e. from block -> district.
4.9 Data Compilation and Generating Consolidated reports of Block/District

In order to view filled status of the facility wise at one go, click on the compilation option at the top of the page. The compilation screen appears. On the left hand panel, select the options on data filled status and click generate report. This report displays the filled status of all the facilities in the block/district month wise.

This can help track the facilities who have filled the reports and those who have not reported.
In Order to generate a compiled report of data filled by all the facilities, click on the Compilation option on the top. On the right hand side panel, select the option “Compilation report”, select other options like, module, periodicity, period, report type, financial year, Performa /format (to be compiled to).

This generated a compiled report ONLY.

In order to compile the data and create a compiled file for district/block , uncheck the compilation report option and then check the “data compilation” option and select all the other parameters required for data compilation. This would compile all facility data into Block consolidated/District Consolidated file.
5. Report Generation

The following output reports are detailed under report generation. These reports can be logically grouped under the following heads:

1. Administrative Reports
2. Status Detail
3. Filled Summary
4. Least Common Factor
5. Percentage Fill
6. Status of data uploading
7. Data Reports
8. Data item wise report
9. Data entry report
10. Validation Reports
11. Outlier report
12. Validation error
13. PRC Verify Report
14. Analytical reports
15. Performance of RCH
16. HMIS indicators
17. District wise contribution/RCH
18. Masters
   a) State
   b) Division
   c) State-Type
   d) Area category
   e) Area Sub-category
   f) District
   g) Sub-District
h) Town
i) Village
j) Facility
k) Financial year

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load Default Parameters</td>
<td>This option loads the most commonly used parameters for all of the following fields. This by default takes the Status Type as “All”, Module as “MIS”, Periodicity as “Monthly”, Performa / Format as “Monthly Consolidated” Financial Year as “current year”. These can be changed as the user requirements also.</td>
<td></td>
</tr>
<tr>
<td>Status Type</td>
<td>Select the Status Type from the drop-down combo (All, Sub District Draft, Sub District Forward, District Draft, District forward, State Draft, State Forward)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Module</td>
<td>Select the Module from the drop-down combo. (Infrastructure, MIS, Finance, NHP)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Periodicity</td>
<td>Select the Periodicity from the drop-down combo (Monthly, Quarterly, Annual)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Performa Format</td>
<td>Select the Performa from the drop-down combo (CHC, PHC, SC, Sub Divisional / Taluka Hospital, District Hospital, MIS-District HQ, Monthly Consolidated, Monthly FMG)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Form Section</td>
<td>Select the Respective Section of the format selected above from the drop-down combo (Part A: Reproductive &amp; Child Health, Part B: Other Programmes, Part C: Health Facility Services, Part D: Monthly Inventory Status, Part E: Mortality Details)</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Financial Year</td>
<td>Select the Financial Year from the drop-down combo.</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Entry Level</td>
<td>Click on an option from the Sub District, District, State, National, All</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Compilation</td>
<td>Check this box if you want Block Consolidation (Monthly Consolidated format) at Sub-District Level</td>
<td>Mandatory field</td>
</tr>
</tbody>
</table>

5.1 Administrative Reports

Administrative reports helps in viewing the uploading status of the data by block/ district user and to monitor the data entry in HMIS. It provides details on how much data is uploaded, which mode currently it is in, how much data items are filled in the format. There are various reports to check this, e.g., Status Detail, Filled Summery, Least Common Factor, Percentage Fill and Status of data uploading Report.

5.1.1 Status Detail Report
Status details report displays the status of the data uploaded and the mode it is in at the present. Once the data is entered, it is draft mode and is open for the user to make modifications. Once it is forwarded it is deemed to be final from the data originator. The status details report displays whether the data is in Draft mode or Forwarded mode.
To generated the status detail report click on **Reports-> Data Entry Status -> Status Detail.**

![Status Detail Report](image)

Select the parameters as Module, Periodicity, Performa, Financial Year and Status Type.

![Select Parameters](image)

Click the generate report button to view the output. This report can also be exported to Excel and saved on the computer.
To export the file, from the top click on the option -> Select a format -> Excel -> Export.

Note: Along with generating the output, it also enables the user to view the parameters selected by the user for generating the output view i.e the date and time of generation of report, type of Module, Periodicity, Performa/Format, entry level: district or sub-district, year, Status type, and specified States etc. Click on save and specify a location, where the file is to saved.
Note: The Export to excel process is same throughout the HMIS System.

5.1.2 Filled Summary Report
The filled summary report enables the user to view the number of districts of States (out of total districts of the State) Entered the data in each month. However, at district level, the output displays the data by coding 1 as data filled/uploaded and 0 as data not filled/uploaded by the user. The number displayed signifies the number of districts in a state who have filled the data for the particular month.
5.1.3 Least common factor (LCF)

Least common factor report denotes the least number of months for which data is filled for the districts/states. Ensure that one of the options of Select data equality option (=, >, <, <=, >=) is selected. Set minimum number of district/state has entered the data. e.g. if data equality is equal to= and Minimum number of times option selected =9, then the output report shows all the States/districts filled in data in multiples of 9 i.e. 9, 27, 36 etc.
5.1.4 Percentage fill Report

Percentage fill report enables the user to view the complete picture of data filled by districts/states by displaying month-wise percentage of number of zeroes entered by particular district/State, percentage of blanks left out by the specified districts/States and percentage data filled by the district/States for the total data items. In order to make a comparison of the data filled to the empty Spaces behind filled with zeroes or blanks, percentage fill report has been incorporated.
5.1.5 Status of Data uploading
This report facilitates the user to preview the summary of data uploaded by the various levels viz. Sub district/district/State in terms of percentage of data uploaded, percentage of uploading pendency, data committed by district/state and committed pendency.

Fig 4.2 : Status of Data Uploading Report
5.2 Data Reports

Data item wise report
Data entry report

5.2.1 Data Item Wise report
This report provides the data on selected indicators for the selected parameters viz. Status Type, Periodicity, State, Districts, Data Items and Report Type. There are 227 indicators (data items) kept under various sections e.g.
Select Status Type, Module, Periodicity, Performa/ Format, Form selection/ Entry Level, Data Item, Report Type, Financial Year, State, District, Period.

Once the module is selected it loads the data items in the Box. In case few data items are required from 1 section only, from the form selection menu the section can be selected (e.g., PART A – Reproductive and Child Health)
click on the items required and click on “>” to move it into selection box. Multiple items can be selected together with “Shift” or “Ctrl” key.

Note: In case you have selected all items, it takes more than normal time to generate the report. Select the report type as how you want the report to be viewed. Report can be viewed “Across periods” (month, quarter, year wise), “Across Districts”, “Across states”, “Across Financial Years”, “Across districts and Across Periods”, “Across States and Across periods”
Select State -> District -> Period -> click on Generate Report
5.2.2 Data Entry Report

The output is a consolidated report of the Specified States and districts, for all the data items for specified months of the financial year. Click the Data Entry Report under the Reports menu. Select Report Type, Module, Periodicity, Performa/Format, Forwarding Status, Financial Year, Period from, Period to, State, District, Sub District.

Click on the Generate Report button.
5.3 Validation reports

In order to check data integrity by application of specified rules and to identify and review data of each indicator for accuracy and the appropriateness of its inclusion, certain validation checks have been integrated. There are Outlier report and Validation error to check the data.

5.3.1 Outlier report

An outlier is an observation that lies an abnormal distance from other values in a random sample. Outliers are usually infrequent observations. In order to highlight these infrequent observations, which includes one or more values that appear unusually large or small and out of place values when compared with the other data values, the outlier’s reports are generated. The outlier report enables the user to depict the district wise and further month wise anomalies by highlighting the outlier value.
Select Financial Year, Month, Name, Outlier, State Name and District Name. Outliers are generated for a period of 12 months. In case no district is selected the outlier are calculated for the entire state, which shows abnormalities in the state data. But as most of the abnormalities are averaged out, in consolidated state data, it is advisable to generate outliers of the district before forwarding the data.

The output displays the system generated outliers to review month wise value of each data item district wise/ State wise carefully for accuracy.

5.3.2 Validation Error Report

The validation error report facilitates the user to view District wise/ State wise data item wise error summary of indicators that do not correlate with one another.
Select Module Periodicity Performa / Form at Financial Year Period State District Sub District Facility and click on -> Generate Report.

5.4 Analytical reports

Analytical report is for Monitoring and Evaluation of performance indicators of RCH and the program. There are few build in report which can be generated from the portal.

1. Performance of RCH
2. HMIS indicators
3. District wise contribution/RCH

5.4.1 Performance of RCH

This report is for all RCH Indicators across states and districts. Performance of RCH indicators can be measured with the projected figures /need assessed data. In case district is not selected, the state report is generated, else district report is generated.

This report also displays how much data has been entered against each data item.
5.4.2 HMIS indicators

This report gives the data on selected sub group of indicators in group of indicators for the selected month in a Financial Year, State and District. There are several important HMIS indicators (grouped together) which are frequently required to view the performance of district/State for a Specified time period.

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<td>Deliveries Caesarean</td>
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<td>Pregnancy outcome</td>
<td>MTP RTI/STI</td>
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<tr>
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<td>Age 12 months above</td>
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<tr>
<td>Ambulance service</td>
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<tr>
<td>Maternal Health</td>
<td>Child Health Others/ Service</td>
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<tr>
<td>delivery National Disease</td>
<td>Control Programs</td>
</tr>
<tr>
<td>Control Programs</td>
<td></td>
</tr>
</tbody>
</table>

First Trimester Proportion of pregnant women received 3 ANC check-ups among registered for ANC
Proportion of pregnant women received 1st dose of Tetanus Toxoid (TT1) vaccine
Proportion of pregnant women received 2nd dose of Tetanus Toxoid (TT2)/booster vaccine
Proportion of pregnant women given 100 IFA tablets to total registered for ANC
Proportion of pregnant women found anaemic HB < 11 g/dl to women registered for ANC
Proportion of pregnant women found anaemic HB < 7 g/dl and treated at an institution to total pregnant women found anaemic HB < 11 g/dl
Proportion of pregnant women found anaemic HB < 7 g

Select Financial Year, Month, State, District, Indicator Group, Indicator Sub Group.
Click on Generate Report to view the report.
5.4.3 District Wise Contribution/RCH

In order to view only the individual district wise performance and its contribution to the state performance on Reproductive and Child Health indicators. The output of this report is district wise contribution to the selected state’s performance on the selected RCH Indicator. There are two outputs of this report one is a chart and other is a table.

Select Financial Year, Up To Month, State, Report Name, Status Type, State/District Wise State and District Wise, State Wise, Report Type, Show Achievement Bar, Show Contribution Line.

Report Name: BCG, Children more than 10 years given TT10, Children more than 16 years given TT16, CONDOM USERS, DPT IMMUNISATION, DT IMMUNISATION etc.

Report Type: Table, Chart
Click on the Generate Report Button.

To Generate a Chart; select the Chart option in report type. Select the option for Achievement Bar and Contribution Line.
And click on Generate Report to generate graph. The graph options colour and type can be changes according to user preferences. This can be done through graph options on the top.

5.5 Masters

The Masters is a comprehensive directory of information about State, Division, State Type, Area Category, Area Sub Category, District, Sub-District, Town, Village, Facility, Financial Year.
Fig 5.5.1: Masters

Select Reports-> Masters -> State -> Generate Report
Report -> Masters -> District -> Generate Report

In case the state name is selected, the report for the districts of selected state is selected. This file can be exported in excel as well.

Masters → Facility (Facility Name, Notional/Physical, Health Facility, Bed Count, Facility Type, Location, Area Category, Area Sub-Category, Area Covered (In Sq. Km), Population Covered, State, District, Sub District/Block, Village, Town, Description, Is IPHS Survey carried out?, Date
6. Masters

Masters options help users to view, add, modify, delete facilities, village/town, sub-districts, and districts in the main database. Facilities master modification can be done by District/ State User ONLY.

6.1 Adding a facility

In case a new facility is created, the name can be added to the database. To add a facility click on the masters tab on the top. Select health facility. Click on add button to add a facility. Write the facility name in the box. Select health facility, facility type, area category, district/sub-district, village/town details. And click on ADD button on the bottom of the page. PS: it is always advisable to write the facility name with the type for identification in case another facility exists with the same name. For e.g., “Kadamtaka Sub-centre”, and “Kadamtala PHC”

The details marked with “*” are mandatory to enter.

6.2 Modifying Masters

In case a facility name is incorrect or some corrections are required in already existing facility, then the facility details needs to be modified. Click on search button on the top, select “health facility” and click on the “Search” button. The list of all the facilities would be listed at the bottom. Click on the edit button to modify the facility details.
6.3 Deleting a facility

To delete a facility, click the search option, type the facility name and facility type and click on search. In case the facility name is not known, click on facility type option and click on search. This would display all the facility in the district. Click on the delete checkbox on the facility to be deleted and click on delete button on the bottom of the page.
7. Feedback and Queries

In order to send feedback, queries, suggestions, error reporting or any help/support required, the user can send an email to hmis-nrhm@nic.in

The emails are answers within 48 working hours. In case it is a modification or error in the portal which needs to sorted at the software end, it takes few more days.
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Validations done in DHIS Version 2