**mHero [insert country name] Standard Operating Procedures**

**[Insert Date]**

1. **Purpose**

mHero is an open-source mobile health worker communication and coordination platform. mHero facilitates strong two-way communication through the use of SMS, enabling health workers and Ministries of Health to be connected as they have not been before. The purpose of this Standard Operating Procedure (SOP) is to provide guidance to the Ministry of Health in the operations of the mHero platform and to ensure consistency in the process of implementation. The SOP should be reviewed quarterly to make updates and revisions.

1. **Scope**

This SOP describes the regularly occurring mHero operating procedures at the Central Level Ministry of Health and is intended for all Health Units, Directorates and/or Divisions who utilize the platform. It is suggested that for District or County Level mHero implementation, this SOP be adapted and modified accordingly.

**3.** **Definitions**

iHRIS: free, open source software for managing health workforce data.

SMS = short message service; a text message sent to a cell phone?

Target Group = A group of health workers that will receive the SMS sent through mHero; can also refer to their contact information. A group of health workers that each unit has targeted to work with in county level and also their contact information.

Workflow = a series of questions developed in RapidPro and converted into SMS

Use Case = the purpose, reason or topic behind a request to use mHero to communicate with health workers. Use cases are turned into workflows in RapidPro and disseminated through iHRIS

RapidPro= program to develop, send and receive messages (via SMS) and analyze responses

Trigger Word = starts a particular workflow to the recipient or targeted group of people

Interoperability: The ability of programs to communicate, exchange data and use that data with one another.

**4**. **Prerequisites**

1. The Ministry of Health has identified individuals to form an mHero team, responsible for championing and leading mHero operations, including the development of workflows and analysis of mHero data.
2. [Sufficient ICT infrastructure](http://www.mhero.org/toolbox-resources#itprocurement) is in place to support mHero including a computer, a dedicated server, and internet connectivity.
3. The database used to house health worker contact information is interoperable with a dedicated instance of RapidPro or other SMS platform.
4. Implementing Partners wishing to use mHero are expected to work with relevant Ministry of Health [Units, Directorates, Divisions], and their requests must be initiated through them.
5. **Roles & Responsibilities** The following suggested roles and teams should be established to facilitate the day-to-day operations of mHero, as well as the strategic utilization of the platform, so that both are in-line with national health and health information system policies and strategies.

***For more detailed information on these roles and teams, see Terms of Reference (TOR) document***

**mHero Data Manager:** The mHero Data Manager operates the day-to-day implementation of mHero to ensure the effective and efficient use of the system. The Data Manager represents mHero throughout the MOH, soliciting use cases from [units/directorates/teams] within the ministry and developing corresponding workflows. The Data Manager is responsible for reporting the results of workflows back to Requestors. The Data Manager may also be asked to perform analysis of the workflow and report back to the Requesters. The Data Manager assists the mHero Management Team by supporting advocacy and awareness raising of mHero with partners both internal and external to the MOH. The Data Manager will identify issues in the implementation of the system and report them to the mHero Supervisor and mHero Management team.

**mHero Supervisor:** The mHero Supervisor oversees the implementation of mHero to ensure the effective and efficient implementation of the system. The mHero Supervisor oversees mHero Data Managers and ensures that mHero is well integrated into the MOH structure and system, in particular the health information system framework. The mHero Supervisor is also responsible for ensuring that implementation follows mHero policy and procedures. The mHero Supervisor will represent mHero throughout the Ministry and with partners to raise awareness of the existence and purpose of the platform. The mHero Supervisor will serve as a point person in the Ministry for mHero operations. The mHero Supervisor will take the lead in troubleshooting any issues that may arise with the system and take the lead in reporting on the activities of mHero to upper level management.

**mHero Management Team**: The mHero Management Team works together to oversee the implementation of mHero, ensuring that that the platform is well integrated into the Ministry of Health structure and system, that the component technologies are functioning appropriately and that implementation is following mHero policy and procedures. The mHero Management Team will represent mHero throughout the Ministry and raise awareness on the existence and purpose of the platform, as well as be the first point of contact for requests for use of mHero. Suggested members of an mHero Management Team could include the mHero Data Manager(s), mHero Supervisor, other HMIS or HR Managers, the ICT Manager and internal mHero MOH champions from individual health units.

* [List team member names here]

**mHero Leadership Team**: The mHero Leadership Team is the overall mHero leadership body that provides strategic direction for the mHero Platform, determining the scope, strategy and operations of mHero within the Ministry of Health. The mHero Leadership team thus works with the mHero Management Team to ensure that mHero is well integrated into the Ministry of Health structure and systems as well as the daily business practices of the [Units/Directorates] the Leadership Team Members represent. The mHero Leadership Team will receive monthly reports from the mHero Management Team for review and comment. The membership of the mHero Leadership Team brings together diverse capabilities from different professional backgrounds required to move the mHero activities forward. The Team should have no more than fifteen (15) members and include members from all of the [Units/Directorates] that will utilize mHero, as well as representatives from the ICT [Unit/Directorate], local partners and funders as appropriate.

* [List team member names here]

**Other roles and responsibilities:**

* **Requestor**: This is the person who requests a use case be developed and disseminated. He/she is usually the mHero Focal Person or the Director or Manager of a [Unit, Directorate, Division]. This person will be responsible for coordinating with the mHero Data Managers in the development of the workflow and must obtain approval from the [Director/Head] of their [Unit, Directorate, Division] before the workflow can be sent. In some cases, the requestors will be responsible for their own analysis of mHero data. The Requestor is responsible for sharing mHero results with their own team/unit and supporting the decision making processes around using the data.
* **ICT Support:** mHero implementation often requires the assistance and support of an individual with a background in ICT to troubleshoot issues that may arise with the servers or component technologies. Though the ICT Manager is listed as part of the mHero Management Team, it may be good to have a dedicated ICT Technician assigned to support implementation.
* [**iHRIS TORs**](http://www.ihris.org/toolkit/): Given the similarities and complements between iHRIS implementation and mHero, iHRIS TOR have been included here as a reference. The TOR include roles and key responsibilities for an iHRIS Project Manager, IT Team Lead, HRH Data Analyst and a Planning and Utilization Team Leader.

1. **Central Level mHero Operating Procedures**
2. Once a use case is identified, the Requestor should complete a Use Case Request Form, attaching the questions to be asked and, if appropriate, follow-up responses. The form should be filled out in as much detail as possible and submitted to the mHero Data Manager at least 1 week in advance to allow time for review and scheduling. All [Units, Directorates, Divisions] will be given Use Case Request Forms in hard copy and the [Unit, Directorate, Division] implementing mHero will also have copies.
3. Upon receipt of the Use Case Request Form, the mHero Data Manager will schedule a meeting with the Requestor to discuss the content and clarify any questions, referring to the [mHero Workflow Development Tips](http://www.mhero.org/toolbox-resources#workflowdev) [for assistance if needed](https://drive.google.com/drive/u/0/folders/0BwAuvwdgx3zFci1CRFI3dWRBZVU). The mHero Data Manager will fill out the [mHero Use Case Planning, Implementation and Monitoring Too](http://www.mhero.org/toolbox-resources#usecaseplanning)l with information about the new Use Case and develop the workflow in RapidPro or another SMS Platform.
4. After the workflow has been developed, it should be tested in this sequence:
   1. Test using the simulator on the RapidPro site (or other SMS Simulator)
   2. mHero Data Manager sends SMS to his/her phone to live test
   3. mHero Data Manager notifies Requestor that SMS it will be sent to his/her phone
   4. mHero Data Manager sends SMS to Requestor of Use Case through iHRIS for feedback
5. mHero Data Manager will follow up with the requestor for feedback and edits to the workflow
6. mHero Data Manager will make edits to the workflow.
7. Testing (Step 3) is repeated until Requestor is satisfied.
8. Director/Program Manager of [Unit, Directorate, Division] requesting the workflow initials the Use Case Request Form to acknowledge that the flow is ready is to be activated. This is typically the supervisor of the Requestor, unless the Requestor is the Director of the Unit/Directorate/Division. This person must approve on all workflows before they sent to recipients.
9. The mHero Data Manager activates the flow, sending it to the designated health workers. For troubleshooting in iHRIS, the mHero Data Manager should contact the iHRIS Manager or individual overseeing iHRIS data for technical support.
10. The flow is monitored regularly to collect data, track response rates and determine who is not responding and, if possible, why, using the [mHero Use Case Plan](http://www.mhero.org/toolbox-resources)[ning, Implementation and Monitoring Tool](http://www.mhero.org/toolbox-resources#usecaseplanning). Tracking and monitoring mHero data is important as the responses received from health workers can indicate trends over time and have implications for current and future health programming. Likewise, keeping records of response rates allows the mHero Data Manager to flag questions that are misunderstood and modify them moving forward while alerting the mHero Leadership team to those health workers that are either out of network coverage area or need more training on how to use the system.
11. Results are compiled by the mHero Data Manager and given to the Requestor using the mHero Use Case Overview Report. The mHero Data Manager may also use the mHero Analysis Report Tool to highlight the analytics of the responses.

**References**

* [insert name], mHero Data Manager, [insert phone number and email address]
* [insert name], mHero Supervisor, [insert phone number and email address]
* [insert name], Management Team Members, [insert names, phone numbers and email addresses]

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