HMIS Data Reset & Modification Guideline
For
Monthly Data
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1. INTRODUCTION

There are broadly two types of users i.e. ‘Data Entry Users (DEUs)’ & ‘Read Only Users (ROUs)’. The Data Entry Users report/upload data on HMIS portal in the defined formats and can view this data in available reports on HMIS whereas the “Read only Users” can only view the data reported by DEUs in the form of available reports on HMIS portal. The “Read Only Users” don’t have the right to enter or modify any data reported on HMIS portal.

For reporting / uploading data in HMIS, there are specific set of formats with a specified period of reporting. The data can be reported in HMIS using any of the following mechanism:

- Online data entry (Direct entry into online form)
- Online data upload (single file upload)
- Offline data Upload (or bulk upload) [This option is available only for MIS Monthly facility formats]

When the user uploads/enters data for the first time, it is known as addition of data. Further, the user may modify the data entered only if the data is available in the draft mode and the data can only be modified by the user who has uploaded / entered data. In case the user has forwarded the data to the next level then to make any changes in the data, the data is required to be reset to the draft mode. Once the data is at the draft mode, the user may modify the data.

This document provides the detailed guidelines on the following two important aspects / processes related to data dynamics for “MIS Monthly Data” on HMIS portal:

- Resetting of Data
- Modification of Data

Broadly this document/guideline covers the following details:

- Data Reset Guidelines for MIS Monthly Data
  - Modes of Data
  - Resetting of Data
  - Types of Reset
  - Bulk Reset (BR)
  - Selective Reset (SR)
  - Reset Option Availability

- Data Modification Guidelines for MIS Monthly Data
2. DATA RESET GUIDELINES FOR MIS MONTHLY DATA

As per existing practice, the data is entered / uploaded on HMIS portal and is forwarded to immediate next level. The data entry point can be facility, sub district/block, district or state depending on the type of format which is uploaded / entered. Facility/sub district enters/uploads data and forwards to district. District enters/compiles data and forwards to state. State forwards the data to Centre after ensuring/validating data. Once the data is forwarded to the Centre it can't be modified. In order to modify the forwarded data, the data needs to be reset to the draft mode. At present, block users, district users and state users sends a request to the Centre to reset the data. The data can be reset by the Centre, state and district depending on the rights provided. The different levels or modes of data on HMIS are described below:-

2.1. Modes of Data

- **Facility Level**
  - **Draft Mode**: The facility level user enters/uploads the data in HMIS portal. It remains in draft mode till it is forwarded. The data can be modified at this stage.
  - **Forward Mode**: Facility level user forwards data to sub district after entering /uploading it on the HMIS portal. Forward mode data cannot be modified by the facility unless it is reset.

- **Sub district Level**
  - **Draft Mode**:
    - ✓ In some cases, Sub district level user enters/uploads the data of all the facilities existing in the sub-district. The data of all the facilities can be modified at this stage.
  - **Forward Mode**:
    - ✓ Sub district level user enters/uploads the data of all the facilities present in its block and forward the data to district.
    - ✓ In case of facility level data entry when the facility has forwarded the data to sub-district and the sub-district has forwarded this facility data to District.

- **District Level**
  - **Draft Mode**:
    - ✓ In case of Facility based reporting, the district level user enters/uploads the District HQ data, and then compiles this data along with facility data forwarded by sub-district. The district HQ data can be modified and Monthly Consolidated data can be recompiled at this stage.
    - ✓ In case of District level reporting the district level user enters/uploads the district consolidated data. The data can be modified at this stage.
Forward Mode:
- In case of Facility level reporting, the district level user enters/uploads the District HQ data, and then compiles the data, and forwards the data to State.
- In case of District level reporting the district level user enters/uploads the district consolidated data and forwards the data to state.

State Level
- State Forward: The State forwards the data to the centre.

Note: The data can be modified only by the entity/user that has entered the data.

2.2. Resetting of Data
• The right to reset any mode of data described above is with the HMIS system administrator at centre / national level. However, for the sake of streamlining the process of resetting of data, HMIS system administrator shall only reset the data which is in State Forward Mode. Rest all other modes can be handled by the State or Districts (if the rights are given).

• Further, if a district is to be given the right to reset the data, then the same shall be done by the HMIS system administration on the request of the concerned State/UT after approval of MoHFW.

2.3. Types of Reset

In HMIS, the data may be reset by adopting either the ‘Bulk Reset’ or ‘Selective Reset’ option. This section covers the detailed process on each of these reset options.

2.3.1. Bulk Reset (BR)

This option is used to reset the data in one go based on the selection of parameters in the query in the system. The following parameters cover the broad spectrum of the query:

- Financial Year
- Period
- Proforma / Format
- State
- District
- Sub-District/Block
- Facilities

However, the above parameters shall be filtered based on access (HMIS System Administrator /State user / District user) and based on the proforma / Format selected (i.e. SC/PHC/CHC/SDH/DH / MC).

Further, as an example the screen shot of the entire process of bulk resetting of the data is given below for the North West District of Delhi State (district forward mode). Herein the following facilities of Delhi Govt block were bulk reset (i.e. in one go) which were in district forward mode:

- DGD Ashok Vihar
- DGD Jaidev Park
- DGD Jaunti

Following are the steps for bulk reset (BR):

- Step BR-1: Run the query with defined parameters
- Step BR-2: Click /Press Bulk Reset Button
Step BR-1: Run the query with defined parameters

In HMIS application select MIS module (Monthly / Quarterly / Annual). Herein, MIS Module - Monthly was selected along with some parameters for Delhi State as given below:

Click MIS Monthly as per the screen shot given above
# HMIS Data Reset & Modification Guidelines for Monthly Data

## MIS - Monthly - Search

<table>
<thead>
<tr>
<th>Financial Year</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-2013</td>
<td>April</td>
</tr>
<tr>
<td>2011-2012</td>
<td>May</td>
</tr>
<tr>
<td>2010-2011</td>
<td>June</td>
</tr>
<tr>
<td>2009-2010</td>
<td>July</td>
</tr>
<tr>
<td>2008-2009</td>
<td>August</td>
</tr>
</tbody>
</table>

**Proforma / Format:** PHC

<table>
<thead>
<tr>
<th>State</th>
<th>District</th>
<th>Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andhra Pradesh</td>
<td>Delhi</td>
<td>Delhi Govt</td>
</tr>
<tr>
<td>Arunchal Pradesh</td>
<td>Delhi -&gt; East</td>
<td>Delhi Govt</td>
</tr>
<tr>
<td>Assam</td>
<td>Delhi -&gt; New Delhi</td>
<td>Delhi Govt</td>
</tr>
<tr>
<td>Bihar</td>
<td>Delhi -&gt; North East</td>
<td>Delhi Govt</td>
</tr>
<tr>
<td>Chhattisgarh</td>
<td>Delhi -&gt; North</td>
<td>Delhi Govt</td>
</tr>
<tr>
<td>Goa</td>
<td>Delhi -&gt; Shahdara</td>
<td>Delhi Govt</td>
</tr>
</tbody>
</table>

*Conceived and Developed by Ministry of Health & Family Welfare, with technical support by Vayana Technologies Ltd.*
Step BR-2: Click /Press Bulk Reset Button

On clicking/pressing the ‘Bulk Reset’ button, the following message for taking the confirmation of the user is generated by the system.
Step BR-3: Data Successfully Reset

On clicking/pressing the confirmation button “OK” in the last step, the action of reset is successfully executed and the appropriate message is displayed in the system.
### Step BR-4: Verification

The status of the data has been reset for the three selected facilities to “FACILTY DRAFT” since the data was entered by the facility. In case the data is entered by Sub-District, the status would have been reset to “SUB-DISTRICT DRAFT”.

Further, the MC of the concerned district also moves into “DISTRICT DRAFT” mode.

These details may be seen in the screen shots given below:
Note: In case of District level data entry, the data would be reset to “District Draft-mode”.

2.3.2. Selective Reset (SR)

This option is used to reset the data after analyzing the status of the data. Herein also the reset shall be based on the selection of parameters in the query. The following parameters cover the broad spectrum of the query:

- Financial Year
- Period
- Proforma / Format
- State
- District
- Sub-District/Block
- Facilities

However, the above parameters shall be filtered based on access (HMIS System Administrator /State user / District user) and based on the proforma / Format selected (i.e. SC/PCH/CHC/SDH/DH / MC).
Further, as an example, the screen shot of the entire process of ‘selective resetting’ of the data is given below for the North West District of Delhi State (district forward mode). Herein three facilities (DGD Ashok Vihar, DGD Jaidev Park & DGD Jaunti) of Delhi Govt block were selectively reset which were in district forward mode.

Broadly the selective reset has been covered under the steps which are detailed below:

- Step SR-1: Run the query with defined parameters
- Step SR-2: Click /Press Search Button
- Step SR-3: Reset the Data
- Step SR-4: Verification

**Step SR-1: Run the query with defined parameters**

In HMIS application, select MIS module (Monthly / Quarterly / Annual). Herein MIS Module- Monthly is to be selected. Then the purpose of search has to be selected as “Data Forwarding” for selective reset. Post selection of ‘purpose of search’ the parameters are to be selected.

Herein, for Delhi State some of the parameters selected are given below:
**Step SR-2: Click /Press Search Button**

On clicking/pressing the ‘Search’ button, the result of search is shown below the query.

The result displayed above is in collapsed mode. On clicking the + sign, before the result set the details are displayed as given below:
The detailed result displays the facilities to be reset and their current status of data, option to ‘Preview’ the data, ‘Compare’ with previous months data entered, ‘Verify’ for checking data entry validations, ‘Delete’ for deleting the data and reset to reset the data.

*The “Delete” option is only available for the HMIS system administrators.*
Step SR-3: Reset the Data

Select the facilities whose data is to be reset from the result set as given in the screen shot below:

On clicking ‘Reset’ button after selecting the facilities whose data is to be reset, the confirmation message is shown by the system to the user.
On clicking the “OK” button in the confirmation message, the action of reset is completed and the appropriate message ("Selected records has been Reset") is displayed in the system.
## HMIS Data Reset & Modification Guidelines for Monthly Data

### MIS - Monthly - Search

<table>
<thead>
<tr>
<th>Financial Year</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-2013</td>
<td>2013-2014</td>
</tr>
<tr>
<td>2011-2012</td>
<td></td>
</tr>
<tr>
<td>2010-2011</td>
<td></td>
</tr>
<tr>
<td>2009-2010</td>
<td></td>
</tr>
<tr>
<td>2008-2009</td>
<td></td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>State</th>
<th>District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andhra Pradesh</td>
<td>Delhi</td>
</tr>
<tr>
<td>Assam</td>
<td>Delhi-&gt;Central</td>
</tr>
<tr>
<td>Bihar</td>
<td>Delhi-&gt;East</td>
</tr>
<tr>
<td>Chhattisgarh</td>
<td>Delhi-&gt;New Delhi</td>
</tr>
<tr>
<td>Goa</td>
<td>Delhi-&gt;North</td>
</tr>
<tr>
<td></td>
<td>Delhi-&gt;North East</td>
</tr>
<tr>
<td></td>
<td>Delhi-&gt;North West</td>
</tr>
<tr>
<td></td>
<td>Delhi-&gt;Shahdara</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sub District/Block</th>
<th>Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>North West-&gt;FPVMC31</td>
<td>Delhi Govt.-&gt;DGGK Purna E</td>
</tr>
<tr>
<td>North West-&gt;MCW Derwals MC</td>
<td>Delhi Govt.-&gt;DGGK Purna C</td>
</tr>
<tr>
<td>North West-&gt;MC30</td>
<td>Delhi Govt.-&gt;DGGK Kirari</td>
</tr>
<tr>
<td>North West-&gt;ESI</td>
<td>Delhi Govt.-&gt;DGD Modanpur Daba</td>
</tr>
<tr>
<td>North West-&gt;CGHS</td>
<td>Delhi Govt.-&gt;DGD Mejra Daba</td>
</tr>
<tr>
<td>North West-&gt;Autonomous</td>
<td>Delhi Govt.-&gt;DGD Ashok Vihar H E</td>
</tr>
<tr>
<td></td>
<td>Delhi Govt.-&gt;DGD Javeri Park</td>
</tr>
<tr>
<td></td>
<td>Delhi Govt.-&gt;DGD Jauri</td>
</tr>
</tbody>
</table>
Step SR-4: Verification

The status of the data has been reset for the three selected facilities to “FACILITY-DRAFT” since the data was entered by the facility. In case the Sub-District would have entered the data the status would have reset to “SUB-DISTRICT DRAFT”.

Further, the MC of the concerned district automatically moves into “DISTRICT DRAFT” mode.

These details may be seen in the screen shots given below:
Note: In case of District level data entry, the data needs to be reset to “District Draft-mode”.

2.4. Reset Option Availability

The ‘Bulk Reset’ or ‘Selective Reset’ options are available to users as per the matrix given below:

<table>
<thead>
<tr>
<th>User</th>
<th>Bulk Reset</th>
<th>Selective Reset</th>
</tr>
</thead>
<tbody>
<tr>
<td>HMIS System Administrator</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>State User</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>District User</td>
<td>✗</td>
<td>✔️</td>
</tr>
</tbody>
</table>
3. DATA MODIFICATION GUIDELINE FOR MIS MONTHLY DATA

The data modification guidelines provide the process / guidelines for the modification of data entered in the HMIS Portal.

If the data is available in the draft mode, the user can modify the data using ‘Modify’ option. Else if the data is forwarded, then the data first needs to be reset to the draft mode and can then only be modified.

The overall process for modification of data is covered under the following broad steps which are explained subsequently in detail:

- Step M-1: Run the query with defined parameters
- Step M-2: Click Search Button
- Step M-3: Click Modify Button
- Step M-4: Confirmation on Modification

**Step M-1: Run the query with defined parameters**

After logging in the HMIS Portal, under MIS Monthly, the user is provided with two major options i.e. ‘Add’ and ‘Search’. By default ‘Add’ is in active mode (green color highlighted). For modifying data click/press ‘Search’. Once this is selected, the ‘Search’ option is active (colour of ‘Search’ tab changes to green). Now select the ‘Purpose of Search’ as ‘Data Viewing / Modifying’.
Step M-2: Click /Press ‘Search’ Button

Now enter the various parameters (Financial Year, Period, Proforma / Format & Facilities) for which the data is to be modified and execute the query by clicking /pressing the ‘Search Button’.
On clicking/pressing the ‘Search’ button, the result is displayed as given below:

The above result set is displayed as a collapsed/grid view. In order to see the details click the ‘+’ icon to get the details/expanded view.
Step M-3: Click Modify Button

Click on ‘Modify’ button to open the reported data in which modification is required.

**Note:** if the modify button is in red color, it depicts that the data is in ‘Forward’ mode and cannot be modified. In order to modify this data, it has to be reset to ‘Draft’ mode.
On clicking/pressing the ‘Modify’ button, the actual data as reported is displayed in the form to the user. The user then makes the required changes in the data.

On making the required changes, the user needs to click/press the ‘Update’ button to move to the next part of the form and save the current part for which data is modified, till the end of the form.
Step M-4: Confirmation on Modification

At the end of the form, once the user clicks/presses the ‘Update’ button, the user is displayed with a message stating that “Data has been successfully updated”.

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