**Concept Note**

**Executive Summary**

OpenMRS, an approved Global Good, is a scalable, modular, open source electronic medical records platform (EMR) used by institutions and nations across the globe to build customized medical record systems for use in resource-constrained settings where structured patient record keeping systems can improve health outcomes. Since 2004, OpenMRS has grown to become the point-of-service system used to support care for more than 14.6 million patients in over 6,500 health facilities in 40+ countries to date. It is increasingly recognized as a de-facto EMR standard, supported by the OpenMRS community.

Being user-driven is one of the OpenMRS Community's core values and reflects our community's commitment to the Digital Principle of Development, Design With the User. As a part of updating OpenMRS' frontend to more modern technologies, the OpenMRS Community has moved to a more robust user, design-driven development process, leading to a product that responds to real, not perceived, needs.

OpenMRS implementers and other Global Goods seeking to become more user-driven may benefit from the OpenMRS Community's experience shifting to a more collaborative design-driven approach. This investment will be used to make it easier for OpenMRS developers and implementers to participate in and leverage designs for shared, community features by enhancing our product and design documentation (including videos). Additionally, we will raise awareness of our design-driven approach & documentation across the Global Good & OpenMRS ecosystems by disseminating it through the OpenMRS website, blogs (both OpenMRS & Digital Square), and a Virtual OpenMRS Design Conference.

***Global Good(s) work relates to:*** OpenMRS

**Background**

Although the OpenMRS Platform and core modules are widely used by OpenMRS implementers, many have created customized frontend features designed to improve service delivery to patients. As with many Global Goods, developers have driven much of the design work with limited input from users.

These siloed efforts often duplicate development efforts, limit standards-based interoperability with other health systems, and are difficult for other implementers to use. Moreover, User Experience played second fiddle to data collection and reporting.

In 2019, the OpenMRS Community supported the establishment of an OpenMRS 3 Frontend Squad to address this problem. This squad spearheaded an initiative to update the OpenMRS Reference Application frontend to 1) migrate towards modern web technologies; 2) leverage design driven processes to create an improved UX; 3) support greater inter-organizational collaboration for feature design and development to decrease feature duplication.

Refining community development processes and tools to allow a greater focus on design became a critical component of this initiative. By adopting a new, third party design system and creating community design conventions, new frontend features are easier to re-use or develop and become easier for other OpenMRS implementations to adopt. Our community's product design documentation has not kept pace with this shift. As a result, new organizations and volunteers have a longer onboarding time to OpenMRS design practices and tools. This project addresses this challenge by strengthening our product design documentation and easing access to our community's design processes and tools.

**Objectives and Activities**

This investment will be used to strengthen and disseminate O3 product design documentation that will give OpenMRS designers, developers and implementing organizations the guidance they need to create their own widgets/pages/features within the confines of the 3.x framework.

This goal will be achieved through the following objectives and activities:

Objective 1: Strengthen O3 product design documentation for easy onboarding and use by OpenMRS developers and implementing organizations.

*Activity 1.1: Deep dive/discovery of current OpenMRS product design documentation, tools, and needs*

*Activity 1.2: Prioritize and plan design documentation work*

*Activity 1.3: Test new components and set up*

*Activity 1.4: Rebuild and document patterns*

*Activity 1.5: Review and finalize documentation*

*Activity 1.6: Kickoff migration of OpenMRS UI Patterns from our current design software Sketch to Figma, a web-based, collaborative tool that will dramatically lower the barrier-to-entry for new designers in our community.*

Objective 2: Raise awareness and promote use of product design documentation among the broader OpenMRS community and implementing organizations.

*Activity 2.1: Share project progress with community via Talk and O3 Product Design Sessions*

*Activity 2.2: Disseminate project artifacts through OpenMRS website, blog posts*

*Activity 2.3: Update OpenMRS Global Good video*

*Activity 2.4:Conduct a Virtual Global Good OpenMRS Design Conference*

**STAFF:**

*<< list key staff here – be brief >>*

| Staff | | |
|---|---|---|
| **Name** | **Title/Team** | **Project Responsibilities** |
| Jennifer Antilla | Director of Community | ● Provide grant management and administration, coordinate community engagement and virtual conference planning |
| Grace Potma | Director of Product | ● Provide overall product management and input on product documentation & videos;<br>● Engage with implementations to contribute to and adopt outputs of the project<br>● Co-facilitate Virtual Design Conference sessions |
| Jonathan Dick | Product Lead | ● Coordinate, organize, and guide partner contributions<br>● Provide input on product documentation & videos<br>● Co-facilitate Virtual Design Conference |

| | | |
|---|---|---|
| | | sessions |
| Aline Cavalcanti | Design Systems Designer | ● Create product documentation outlining the architecture of the OpenMRS, its main functionalities, white-labeling capabilities and interaction patterns.<br>● Migrate custom OpenMRS UI components from Sketch to Figma, providing a functional library to be used by the OpenMRS design community. |
| Ciaran Duffy | Design Lead | ● Oversee and review product documentation work.<br>● Provide design feedback and facilitate communication between stakeholders. |

**Timeline**

| **Activity** | **Team, Location** | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Weeks | | | | | | | | | |
| Deep dive/discovery of current OpenMRS product documentation, tools, and needs | | | | | | | | | | | |
| Prioritize and plan documentation work | | | | | | | | | | | |
| Test new components and set up | | | | | | | | | | | |
| Rebuild and document patterns | | | | | | | | | | | |
| Review and finalize documentation | | | | | | | | | | | |
| Begin migrating OpenMRS UI Patterns | | | | | | | | | | | |
| Share project progress with community via Talk and O3 Product Design Sessions | | | | | | | | | | | |
| Disseminate project artifacts through OpenMRS website and blog posts | | | | | | | | | | | |

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|---|---|---|---|---|---|---|---|---|---|---|---|
| Plan, organize, and facilitate a Virtual OpenMRS Design Conference/Seminar Series | | | | | | | | | | | |

**Assumptions and dependencies**

Updating the OpenMRS Global Good video assumes that we are able to access the original video source files and graphics.

**A.4 Payment and Deliverable Schedule**

| **Deliverable Description** | **Due** | **Payment Amount (USD)** |
|---|---|---|
| Product Design Documentation | September 30, 2022 | $22,000 |
| Virtual OpenMRS Design Conference and Blogs | September 30, 2022 | $13,000 |
| Updated OpenMRS Global Good Video | September 30, 2022 | $15,000 |