Deep Dive Onboarding Schedule

Organization: Care for All

Participants: Kabir Shah, Director of M&E, Natasha Patel, Program Manager

Date	Topic	Session Content
Jan 3	Discovery Call	Discuss the project, timelines, staffing, and overall goals
Jan 10	Application Design	Create an outline of all the forms, modules, and case types to be used and confirm all reporting indicators are included in existing forms
Jan 16	Application Building-- Calculations	Review various syntax for calculations
Jan 22	Application Building-- Hidden values	Review ways to use hidden values in the app to store and move data
Jan 29	Application Building Q&A	Troubleshooting/ Q&A from the first 4 forms built
Feb 4	Case Management	Overview of case management, what case properties can do, and which indicators should be saved as case properties
Feb 11	Case Management 2	Overview of advanced case management topics in calculations and data management
Feb 18	Data Pipeline Check-in	Review app as-is and confirm that all reporting indicators are in the correct format, and are easily exportable. Start building data exports.
Feb 25	Custom User Fields	Overview of how to create and use custom user properties for mobile workers
Mar 2	Form Display Conditions	Review how to add form display conditions to control how patients move through the app AND how nurses and doctors have separate app views
Mar 5	App Building Q&A 2	Troubleshooting/ Q&A now that the entire app is built
Mar 12	Application Testing	Overview of creating QA plan and app testing
Mar 19	Application Testing Results	Q&A for any issues found while app testing
Mar 26	Data Exports & Reports	Review data export (case and form data) and build out the rest of the data exports and CCHQ reports
Mar 31	User Management	Review how to create mobile and web users and what roles they should have
Apr 4	Training Preparation	Review best practices for mobile user training and all prep work needed before training begins
Apr 10	On-site Debrief	Review feedback from training, any app changes needed, and clean out training data from the system while team is still on-site
Apr 12	Worker Monitoring	Review worker monitoring reports on HQ and establish process for regular supervision
Apr 16	Data Visualizations	Review how to create an Odata feed and pull it into PowerBI