

Uchaguzi SMS Step by Step

This team will handle all incoming SMS messages into the platform, including determination of origin i.e location.

Before you start:

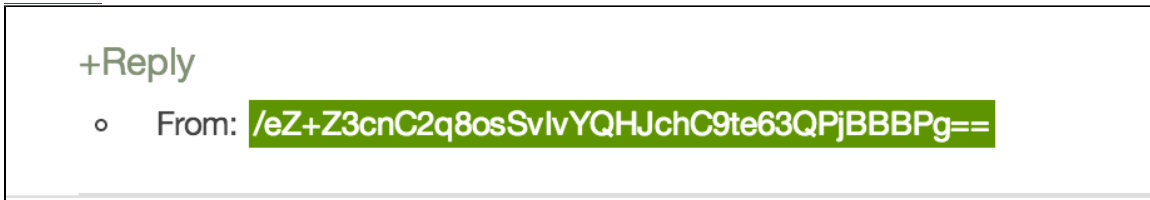
Review the [Uchaguzi Participant Checklist & Guide](#)

Your coleads are: Mark Kamau (Local) and OM (Global)

Instructions

Your team will be in charge of report creation from SMS, their geolocation and categorisation. SMSes will be from:

- Verified Sources - Our trusted reporters on the ground (members of our partner organisations like CRECO). [THESE WILL BE HIGHLIGHTED IN GREEN.](#)



- Unverified sources - Other Civil society organisations, or the crowd. NB: Some unverified sources may be highlighted in blue. These denote UNVERIFIED sources that are considered to be trusted



- For reports that come in with numbers (form response codes), just ignore them for now, tech team is working on a fix on trusted verified reporters. March 4th 14:15 EAT.

Within this team, there will be another small team called the Emergency team. This team, composed of a few people, will handle SMSes that are classified as URGENT EVENTS. They will work with the [Uchaguzi Verification Team](#) and the [Emergency Desk](#) to action these items.

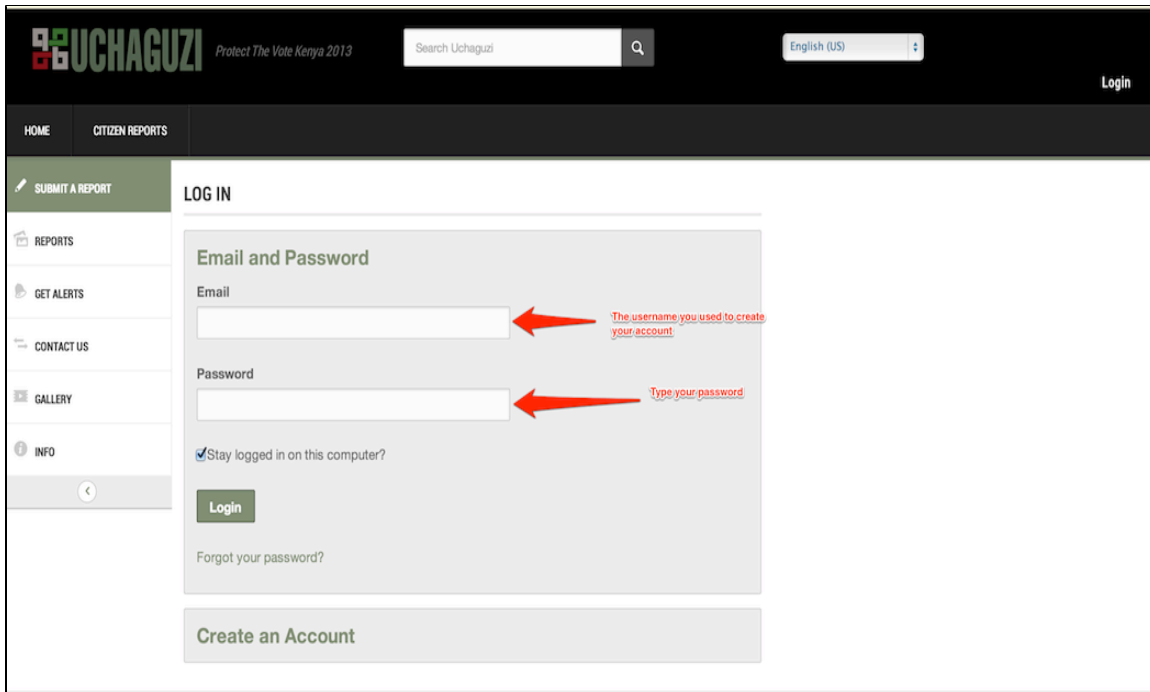
1. Please log into Skype.

Login into the Skype Window of the SMS Team and announce you are starting your shift. If you are not already added to skype chat, please contact your Team Coleads for assistance.

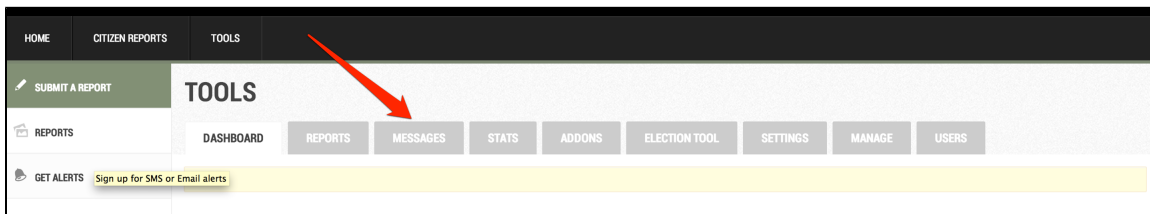
You will be added to skype groups only after you have completed training. For more about using Skype: See the [Uchaguzi Skype workflow](#).

2. Log into the Uchaguzi platform

When you confirmed your participation, we encouraged you to set up your account on uchaguzi.co.ke. We then upgraded your account to your respective member role. If you did not create your account in advance, please go ahead and create your account, then advise your colead so that you may be granted access as per the [Uchaguzi Access Chart](#).



3. Go to the "messages" tab in the admin panel.



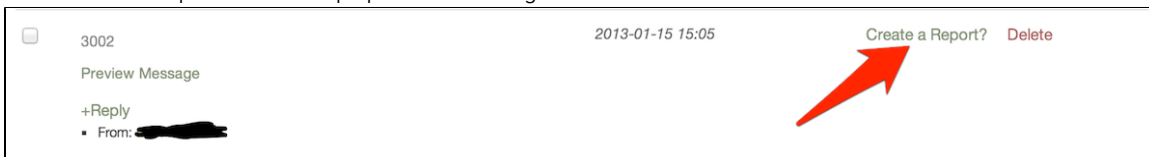
4. Click on the "SMS tab". All incoming messages from 3002 will appear

There are two types of SMS messages: Partner SMS (in green) and Crowd or Civil Society SMS. Partner reports are "verified". All other reports are "unverified".

- SMSes from VERIFIED Sources will be flagged in green. Most (if not all) trusted reporters shall already be geolocated, and have their reports tagged as verified. Trusted reporters have been trained on SMS processes. In the event that trusted reporters are not geolocated, alert your SMS lead.
- SMSes from UNVERIFIED sources are not geolocated and not verified.

Look for messages that are relevant to the [Uchaguzi Categories](#). Ignore those that are off topic (Team lead to discard).

- Select a message to work on
- Click on "Create report" - This is for purposes of checking for thread conversations between a member of the SMS team and the sender



- Click on "Show messages" on the top right hand corner.

** If you find a

thread of messages between 3002 and sender of the SMS, close that report - it will be handled by the person already in conversation with the SMS Sender. Go to back to the messages tab and look for another SMS to work on

** If you don't

find a thread of messages between 3002 and sender of the SMS, move on to the next step

5. Check in with your team.

- Note the ID of the message(SMS) you are working on.
- Search on your team's Skype chat group message logs for the id you have selected
 - If someone has already indicated that they are working on this message, close and move on to another SMS message.
 - If no one has indicated that they are working on this message, cite this report ID on the team skype chat.

6. Review the SMS Messages for quality

Any duplicate SMSes should be forwarded to the SMS lead via skype to handle. NO SMS deletion should be done.

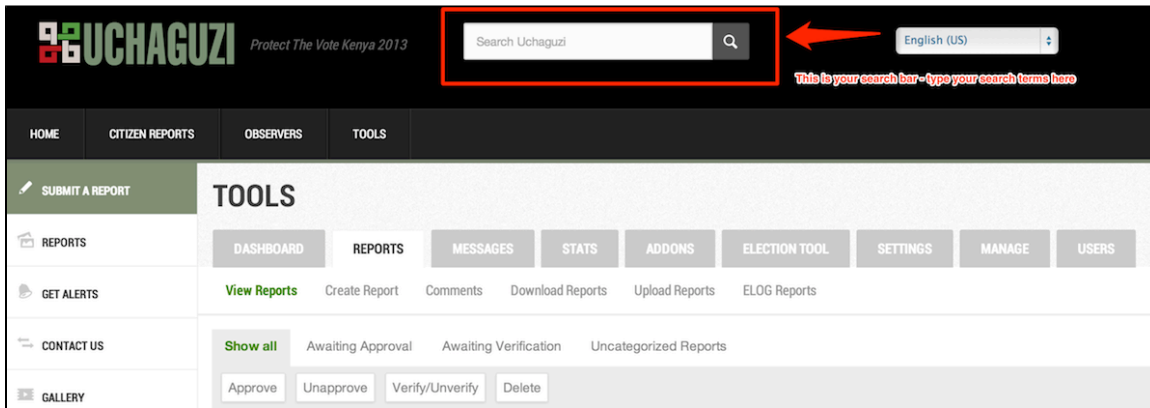
All SMS messages MUST have their locations specified.

- In the event that a location is not specified, click on REPLY and request for location information from the sender.
- In the event that more information is required, beyond the content of the SMS, go back to the SMS message page, click on REPLY and request further information from the sender.

NB: If you have requested additional (location or detailed) information, note down the ID of this message, keep this message open on another tab, and refresh every five minutes to check for responses (which you will find by clicking on the Show Messages button.)

7. Search for potential duplicate messages.

Check the uchaguzi platform for similar reports. You can do this by using the search bar on the top navigation bar.



e.g. If you receive an SMS that says "Polling station number 20 in Uasin Gishu is closed", you will search for key terms such as "Number 20", "Uasin Gishu", or "closed".

If you find a similar report, check if the content of the report is exactly the same or not

- If it is exactly the same, simply append content from the new SMS into the similar report.
- If the report is similar and looks like it could be the same event, reported from a different angle, add a link to the similar report in the report description field with the words "Similar report" preceding.

8. Fill out any other fields in the report form. See Uchaguzi - Anatomy of a Report

The screenshot shows the "Create Report" form in the Uchaguzi system. The form is titled "Form (Select A Form Type)" and has a "Default Form" dropdown. The "Title" field is annotated with a red arrow and the text "Report title goes here". The "Description" field is annotated with a red arrow and the text "Report description goes here". The "Actionable" section has radio buttons for "Not actionable", "Actionable", and "Urgent", with a red arrow pointing to the "Actionable" option and the text "For reports that are classified as critical incidences". The "Action taken" field is annotated with a red arrow and the text "Put location information here". The "Incident Location" section includes "Latitude" and "Longitude" input fields, a map, and buttons for "DELETE LAST", "DELETE SELECTED", and "CLEAR MAP". Below the map is a "City, State and/or Country" input field, annotated with a red arrow and the text "Helps with geolocation". Below that is a "FIND LOCATION" button. At the bottom, there is a "Location Name" field with a red arrow pointing to it and the text "Put location information here". A note at the bottom states: "* Search for your location using a location name OR latitude,longitude coordinates (format: 38.19, 85.61), OR click on the map to pinpoint the correct location.."

Modify Date: Today at 01:34 pm You can change the report date based on the date the report/incident occurred Modify Date New Category

Categories Select as many as needed.

- BALLOT + RESULTS
- DANGEROUS SPEECH
- GEOLOCATION
- LEADERSHIP
- POLLING STATION ISSUES
- POSITIVE EVENTS
- PRE-ELECTION
- SECURITY
- SMS-V
- SOURCE
- TRANSLATION
- Trusted Reports
- URGENT

This is the categories section

News Source Link
 You can add news source links here

External Video Link
 You can add external video links here

Upload Photos
 No file chosen You can also upload photos

Personal Information Optional

First Name

Last Name

Email Address

This is the personal information box.

Information Evaluation

Approve this Report? Yes No

Verify this Report? Yes No

For purposes of report approval and verification. DO NOT TOUCH THIS SECTION!

Save the report/Cancel.

9. Set the appropriate categories for Geolocation and Translation:

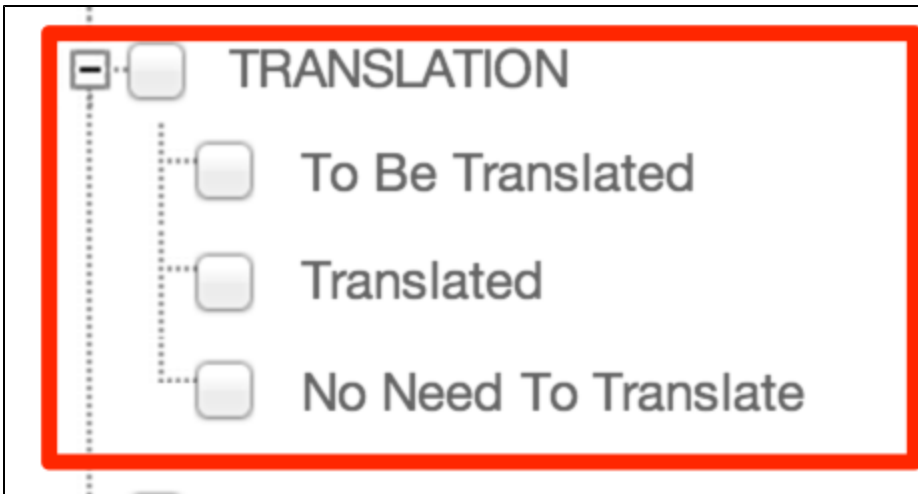
Please do not geolocate or translate the report yourself.

As long as the geolocation team will handle this part of the process. Once the report has a location, go to the categories section, under Geolocation, select "To be Geolocated". If the report still does not have a location after the request has been made to the source to supply one, select "Impossible to Geolocate" and move on to another report.

GEOLOCATION

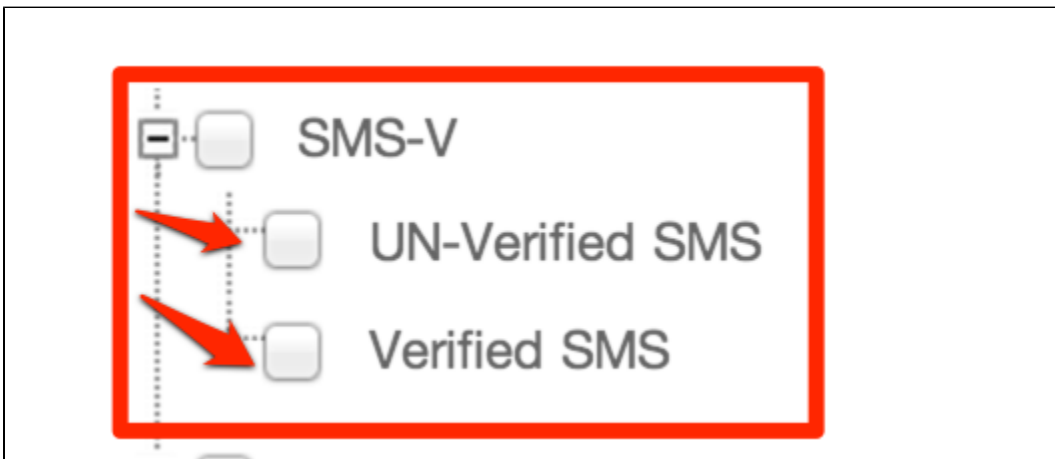
- To Be Geolocated
- Impossible to Geolocate
- Geolocated

Is translation required? If the message requires translation, select the "To be translated" sub-category under Translation.



10. Is this SMS from a Verified/ Unverified Source?

- If it is from a verified source, click on the SMS-V category, and select VERIFIED
- If it from an unverified source, click on the SMS-V category, and select UNVERIFIED



11. Save and Close

Your report will now be handed over to the other teams (Geolocation, translation, reports and verification teams) for further processing.

*NOTE:*If the SMS you are processing falls under the URGENT category:

Flag it to the emergency team in the SMS Skype chat, who will fast track, process, and send it to the [Uchaguzi Verification Team](#) who will confirm the report with our responders on the ground. Share the ID number of the report, and copy paste the link to the report in the SMS Skype chat for the emergency team to find it easily. Let your colead know of the Urgent item.