TTTracker

Administrator Manual

Administrator Manual

TT Tracker Set-up

To ensure that the applications is ready before any field work begins, Administrators and Supervisors must:

- Create coverage area locations
- Create or update mobile users
- Assign coverage area locations to Mobile Workers
- Create or update surgeon list
- Download the TT Tracker application and their country project on all phones

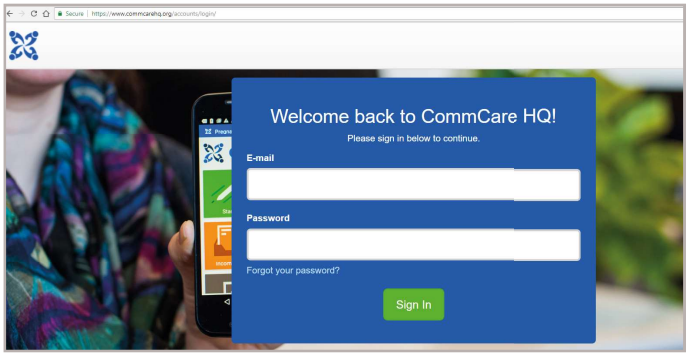
Project Modifications

Access Country Project

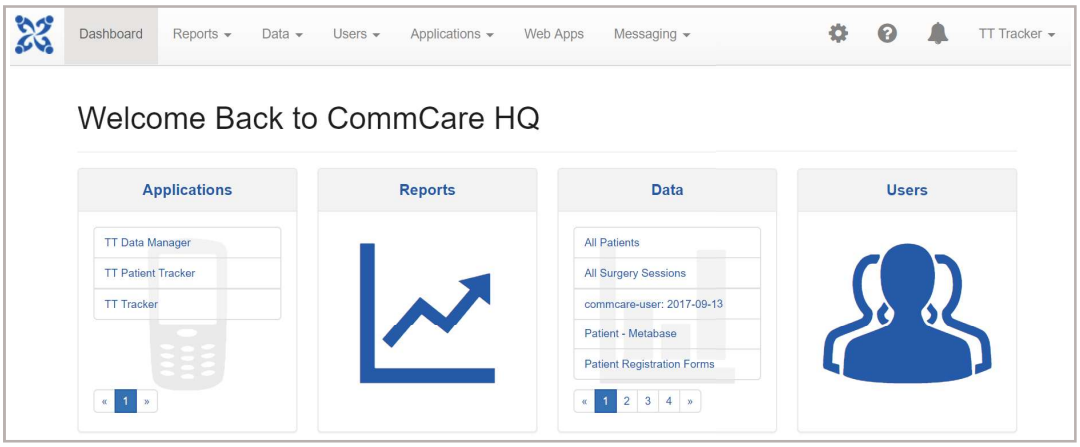
To make any modifications to the country project, you will need to:

1. Log in to **www.commcarehq.org**.
2. Sign in using your e-mail and password.

Note that your account will be created by the TT Tracker Development Team during the creation of the country project; you will subsequently create additional Web User accounts for individuals who need access to the application.



3. Once logged in you will see the Dashboard, where all modifications to the application and data can be completed, using the select menu options.



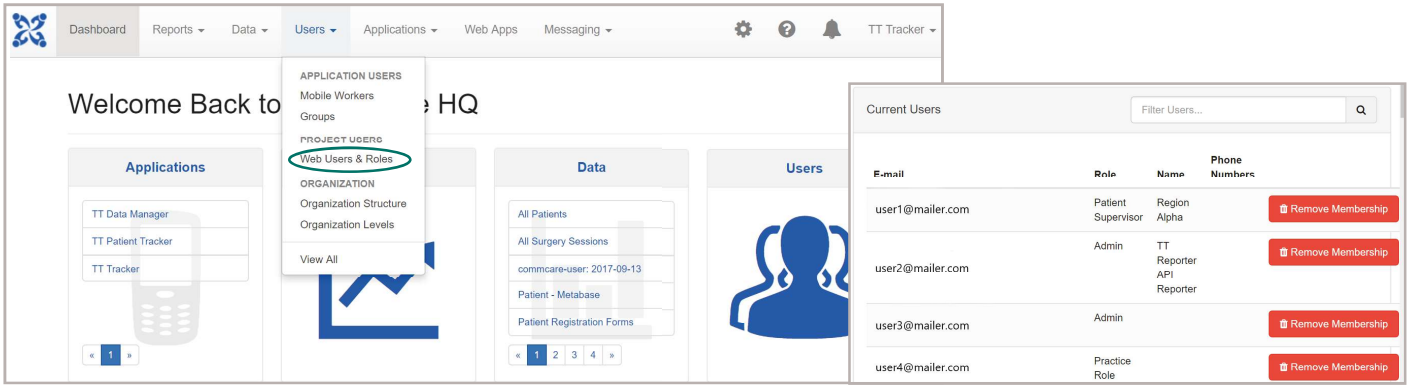
- **Reports:** Used to access CommCare Report Builder and Case Lists for individual patients or sessions.
- **Data:** Used to access CommCare Export Tool, manage surgeon tables, and reassign patients to a different session.
- **Users:** Used to create or update Mobile Workers and Web Users and create or update program locations.
- **Web Apps:** Used to access the online version of the TT Tracker phone application. Can be used to edit existing patient records.

Create Web Users

Web Users are individuals who will need to make modifications to the system itself, including adding/editing locations and data, or who may request additional data exports and reports. The level of their access depends on the role they are assigned by the Administrator.

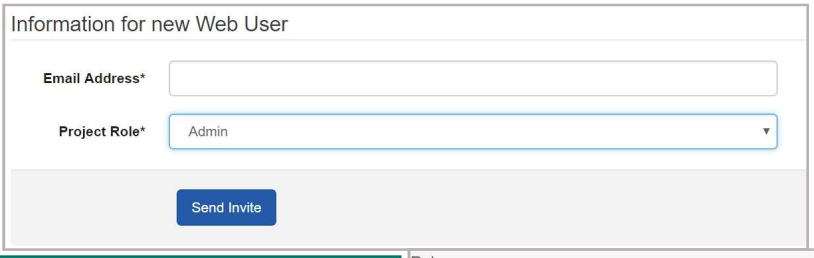
Mobile Workers (surgeons and surgical assistants) entering information on the phones will not require a Web User login, and Web Users cannot enter information onto the TT Tracker unless a Mobile Worker username is used.

1. Select **Web Users & Roles** from the **Users** dropdown list at the top of the menu bar.

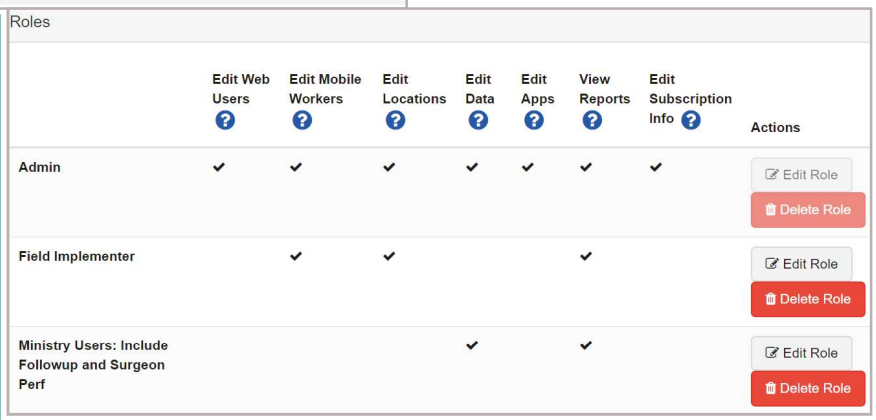


2. Existing users will apear in a list. Select **Invite Web User.**

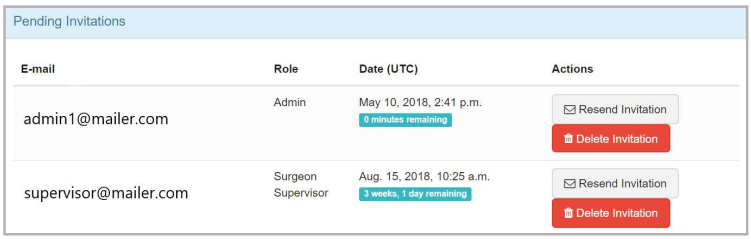
3. Enter the Web User's email and assign the **project role.**



Roles are created based on program needs. Each role is assigned permissions, allowing users an established level of data access. This varies from making changes on all aspects of the system (Admin) to only viewing data without being able to make any changes (Read Only). Programs will create roles and permissions relevant to their program needs.



4. Send invite to user
   - » The email invite will include a link for them to establish their account
   - » The link will expire in 30 days
   - » All pending invitations will appear below the confirmed Web Users.



Need to Know: Automated Report Recipients

For individuals who must receive the surgeon performance report emails reports and/or the patients due-for follow-up emails, this depends on the role that is assigned. If creating a new role, the following must be included in the name of the new role in order for the email report(s) to be sent.

- » If user must receive the Surgeon Performance Report, include Surgeon Perf in the role name.
- » If the user must receive the Due for Follow-up List, include Followup in the role name.
- » If user must receive both reports, include Surgon Perf AND Followup in the role name.
  - ◊ **Example: Program Managers: Include Followup and Surgeon Perf Reports**

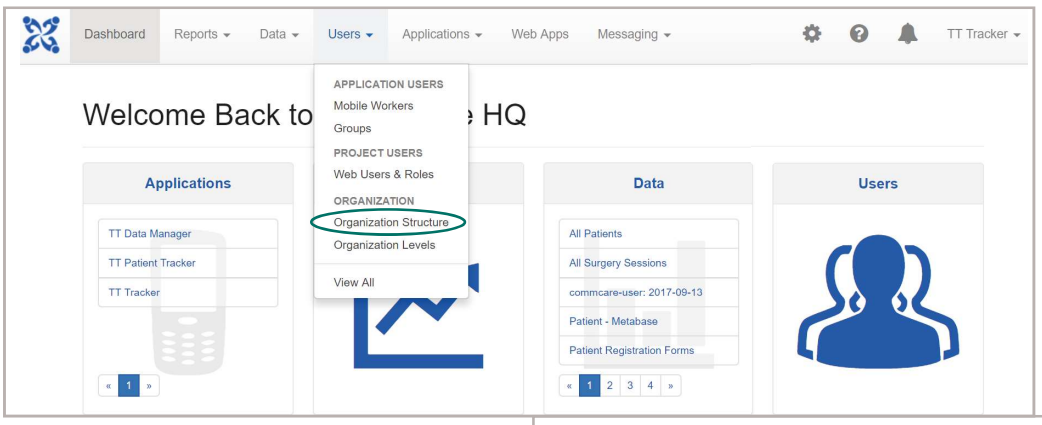
Create Program Locations (Coverage Areas)

The TT Tracker supports a two-level organization structure within a country program. This allows for two administrative units to be established within the larger national structure and used for grouping and analyses. Unless otherwise specified, the two organizational levels will be Region and District; if differing levels are preferred, please inform the TT Tracker Development Team. Locations and coverage areas should be added at the onset of a program's activities, though additional areas can be added at a later date. At the onset of a program, the TT Tracker Development Team will support this, though subsequent additions and changes can easily be completed by Administrators. **See Coverage Area in Definitions**

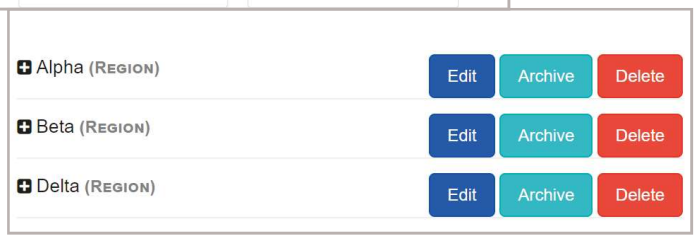
Creating a New Region

The Region is the top level of organization within the country project; it is considered the 'Parent' location. Once a Region is created, the smaller District or 'Child location(s) can be created within that given Region.

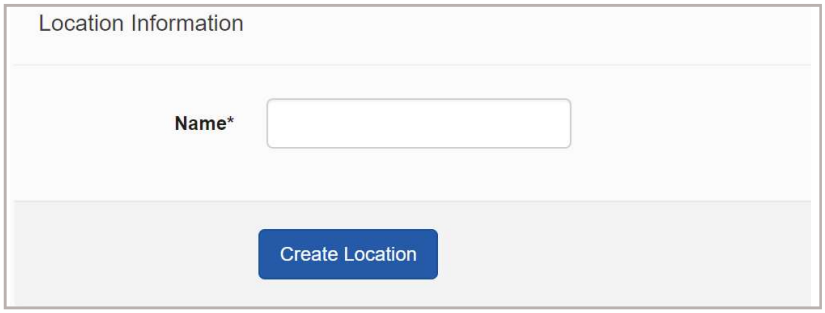
1. Select **Organization Structure** from the Users dropdown list at the top of the menu bar.



2. A list of existing regions will appear. To create a new region, select



3. Provide the name of the Region and select **Create Location.**

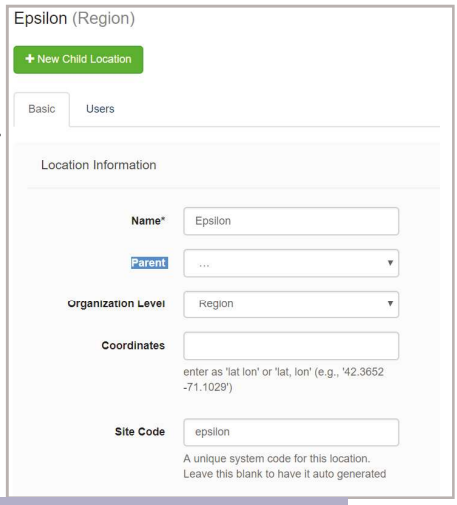


Pay close attention to the spelling; this must be recognized by all Mobile Workers and will be used for all reports.

4. The location will be saved and additional information will populate the Region profile. There will be two tabs, **Basic** and **Users**.
   - **Basic:** Includes **Name**, **Parent**, **Organizational level** and **Site Code**. Do NOT change this information; CommCare will automatically enter this information.

     *Note that because Region is the highest of the two organizational levels, it does not have a larger region (or 'Parent') to which it is associated in the TT Tracker. **Parent** should remain empty.*

   - **Users:** It is possible to see and/or add Mobile Workers to each individual location, though the location can also be added to each Mobile Worker.



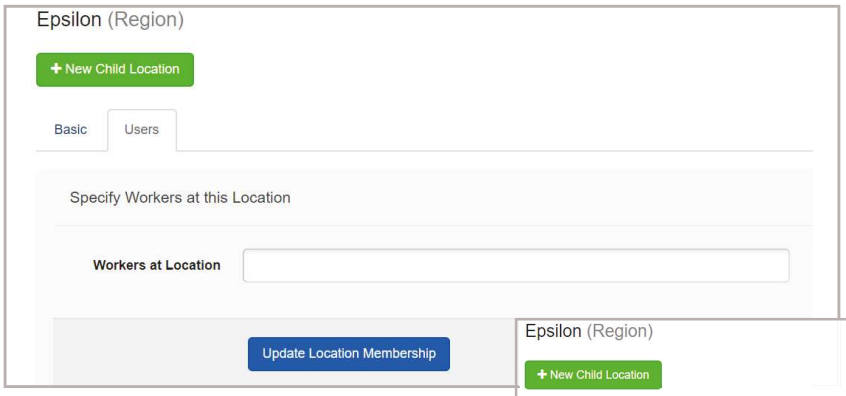
Adding Mobile Workers to Region

If Mobile Workers have not yet been added to a project, the below steps can be skipped. Locations can also be added to Mobile Workers when creating Mobile Workers.

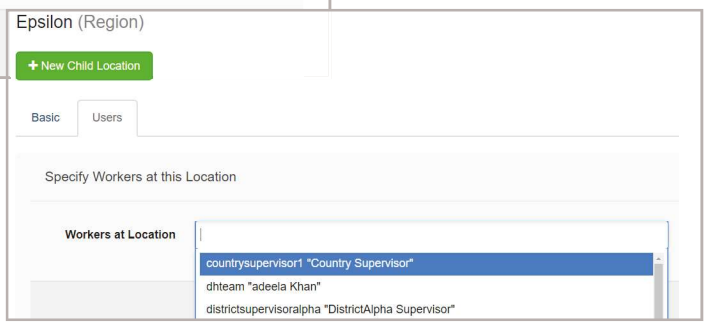
→ Click on the empty space next to 'Workers at Location' and the list of mobile workers will appear to assist with selection

→ Select all Mobile Workers that work in that designated region.

If users should not be given access to all of the districts within a Region, they should NOT be assigned a region but should instead be assigned the individual districts (See Adding Mobile Workers to District)



Click on the empty space next to **Workers at Location** and the list of mobile workers will appear to assist with selection.

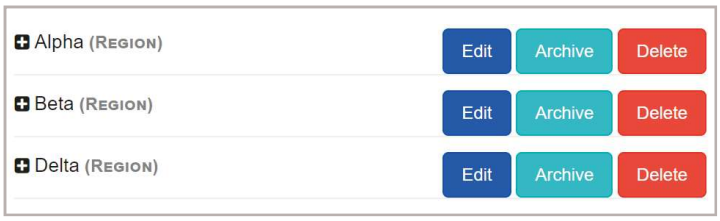


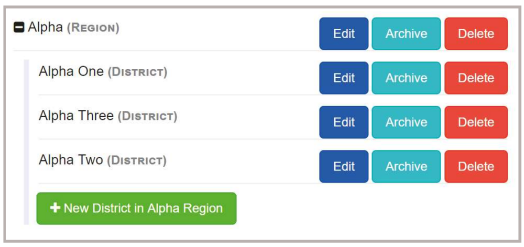
5. Select **Update Location** every time you make a change to the region information.

Adding Districts to Regions

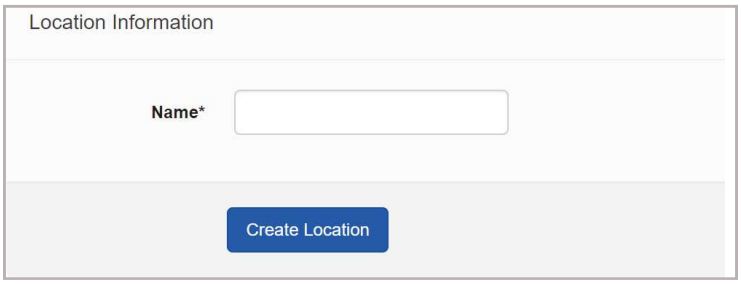
If you need to add Districts (Child) to a Region (Parent), follow these steps:

1. Select **Organization Structure** from the Users dropdown list at the top of the menu bar.
   - » A list of existing regions will appear.
2. Select **+** next to the region to see the districts already saved.





3. Select **+ New District in [Region]**
4. Provide the name of the new District and select **Create Location.**



Pay close attention to the spelling; this must be recognized by all Mobile Workers and will be used for all reports.

5. The location will be saved and additional information will populate the District profile. There will be two tabs, **Basic** and **Users**.
   - » **Basic:** Includes **Name**, **Parent**, **Organizational level** and **Site Code**. CommCare will automatically enter this information.

*The Region to which you are assigning the District should automatically appear in **Parent**. If it does not appear, select the Region where the District should belong.*

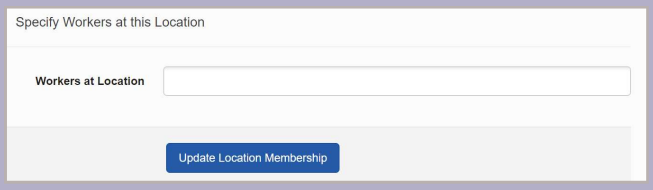
   - » **Users:** It is possible to see and/or add Mobile Workers to each individual location, though the location can also be added to each Mobile Worker.

Adding Mobile Workers to District

If Mobile Workers have not yet been added to a project, the below steps can be skipped. Locations can also be added to Mobile Workers when creating Mobile Workers.

→ Click on the empty space next to 'Workers at Location' and the list of mobile workers will appear to assist with selection

→ Select all Mobile Workers that work in that designated region.



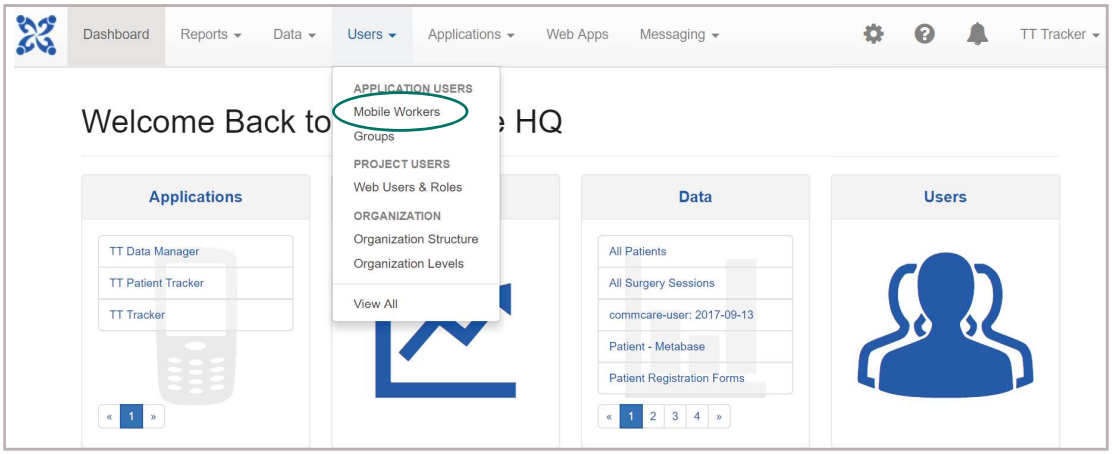
Mobile Workers must already be created in the TT Tracker project BEFORE they can be added to a District or Region.

→ Select **Update Location Membership**

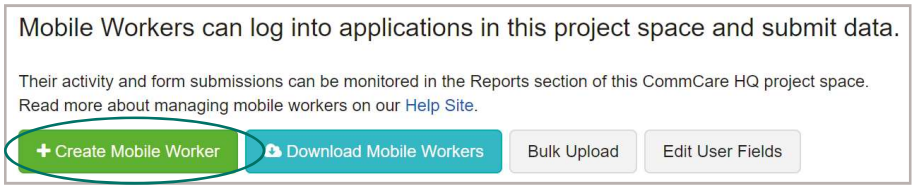
Creating and Editing Mobile Workers

You must create new Mobile Workers at the onset of implementation and as needed throughout the use of the TT Tracker. Once Mobile Workers are created, with locations assigned, and phones have been synced, they will have access to all patient information within the given coverage area.

1. Select **Mobile Workers** from the Users dropdown list at the top of the menu bar.

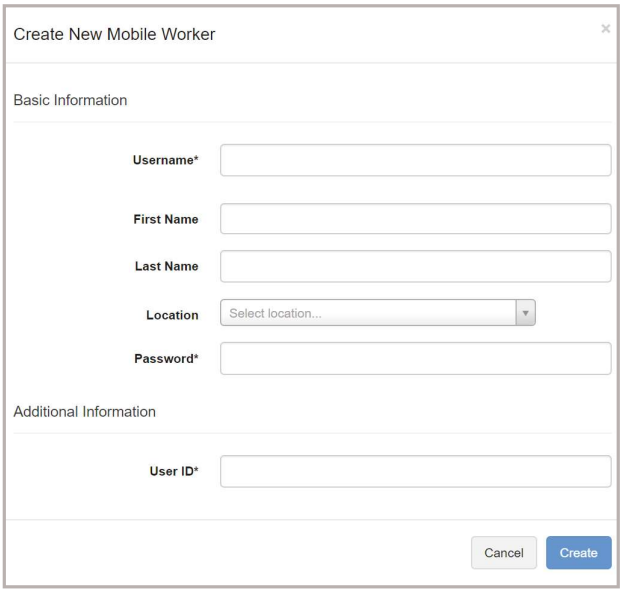


2. When the Mobile Workers page is visible, select green **Create Mobile Worker** button.



   » If there is a large number of individuals to enter, it is possible to enter users in bulk, though the method described here is preferred to avoid errors. See Bulk Upload Mobile Workers.

3. Each Mobile Worker will be provided a username (used to sign in on the phone or web application for data entry), password, and optional first and last name.



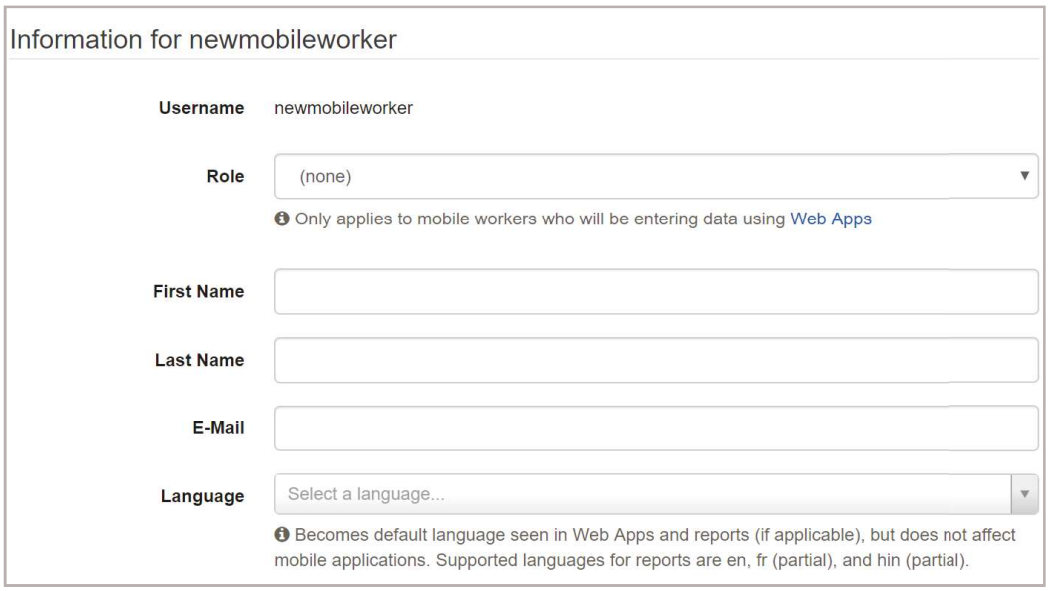
- *Username: If usernames are applied to phones rather than individuals, use the same format for each phone so each phone can be easily distinguished (e.g. [country letters]tracker[#]*
- *First & Last Name: Not required if applying username to phones. Should be included if assigned to an individual.*
- *Location: Can be left blank--the locations can be added once the Mobile Worker is created.*
- *Password: Must be provided. If usernames are for phones, create a password that is easily recognizable for all Mobile Workers across phones.*
- *User ID: Create a two digit alphanumeric ID for each Mobile Worker--all user IDs must be different.*

4. Enter the Unique User ID for the phone/user
   - The unique phone ID is utilized in the creation of Patient IDs as well as Session IDs.
   - Each phone/user must have a unique ID. The IDs should be two letters and/or numbers in length and should be unique to each username.

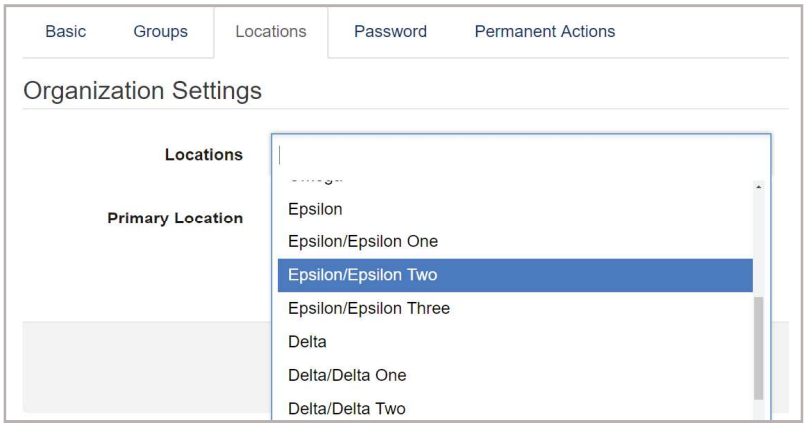
> ***Tips and Tricks:***
> Use the suggested username tracking tool provided at **www.tttracker.org** to keep track of all Mobile Workers and their unique user IDs.

5. New Mobile Worker will appear on the Mobile Workers page. Select the Mobile Worker to continue editing information, particularly the locations in which the worker will be active.

6. The **Basic** Mobile Worker summary includes the relevant information recently added—username, first and last name, and unique user ID with additional information requested.
   - **Role:** This can remain blank--Mobile Workers can use the Web App or the phone version of the TT Tracker to enter patient information; a role is not required to use either interface.
   - **Email:** This can remain blank; no reporting offered by using the TT Tracker will be sent to Mobile Workers. Individuals who must receive designated reports and/or access the CommCare will be considered Web Users and will require an email.
   - **Language:** Select the desired default language.
   - **User ID:** This is required and should be unique; no other Mobile Worker in the country project should have the same ID.



7. The **Locations** tab allows you to assign the coverage area (designated Districts or Regions) to the Mobile Worker.
   - » Click in the white box next to Locations and all program locations created in the project will appear.
   - » Select all locations that apply. Primary location can be any of the selected locations; it does not affect the functionality of the TT Tracker.

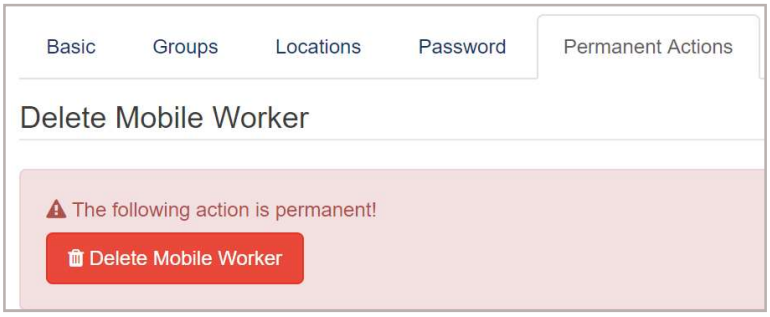


Individual districts or entire regions can be added to a Mobile Worker. It is not necessary to add all of the districts individually if Mobile Worker is working in the entire region--just select the region.

Tips and Tricks

Every Mobile Worker should include OTHER REGION in their locations. This will allow the Mobile Worker to select Other and enter the name of a Region or District if patient's home location is not found.

8. The **Password** tab can be used if a password needs to be changed for any reason. You will not see the existing/old password but will just type and confirm the new password.
9. The **Permanent Actions** tab should not be used, unless a username was mistakenly created and needs to be immediately removed.



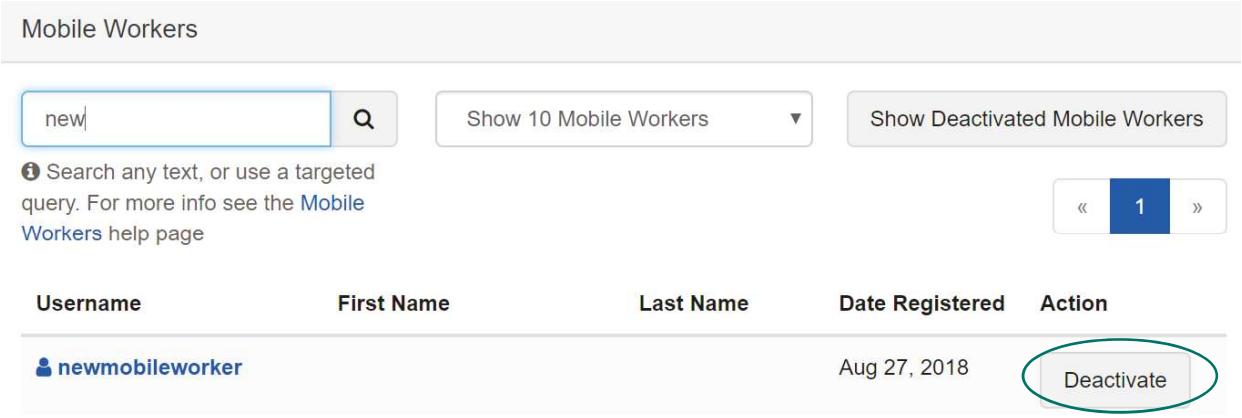
A Mobile Worker should NOT be deleted. Deleting the username will delete all records that were entered by that Mobile Worker. If usernames are no longer needed, the individual can be deactivated or archived but should NOT be deleted.

10. Once new Mobile Workers have been added or edited, phone(s) need to be synced so the information is updated.

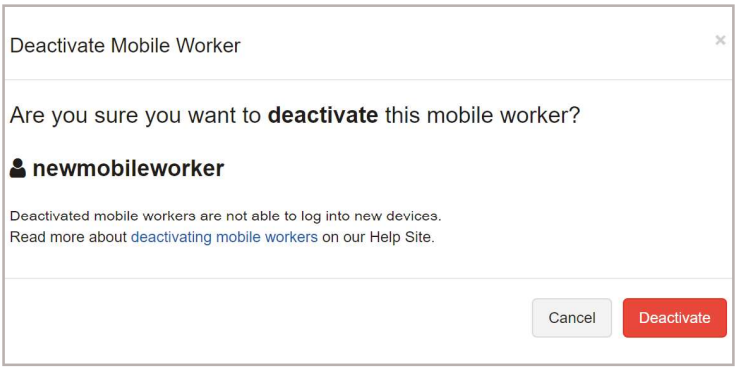
Deactivate Mobile Workers

If a Mobile Worker is no longer participating in the activities of a program, you can easily deactivate them. Many of the Mobile Workers will be phones rather than individuals and thus the need will be minimal. However, individual Mobile Workers who enter data under an individual username will have to be deactivated more often. Deactivating them will ensure they no longer appear on the locations summary of existing users.

1. Select **Mobile Workers** from the Users dropdown list at the top of the menu bar.
   - » A list of users will appear.
   - » If a large number of Mobile Workers are listed, you can search the Mobile Worker by name using the 'Filter Workers' search bar.
2. Find the Mobile Worker that should be deactivated and select **Deactivate**.



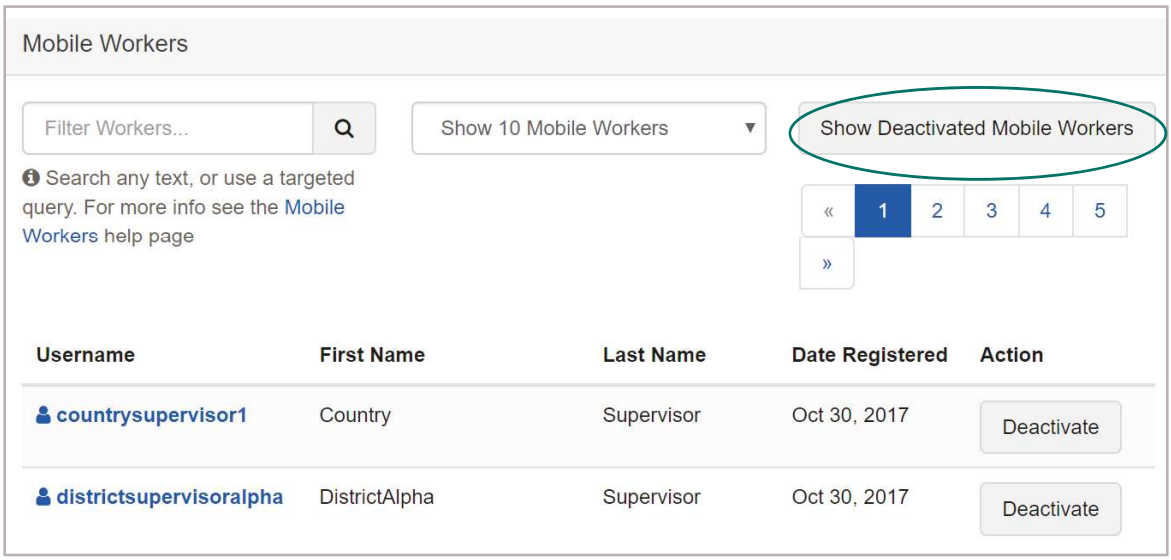
3. Confirm the deactivation.



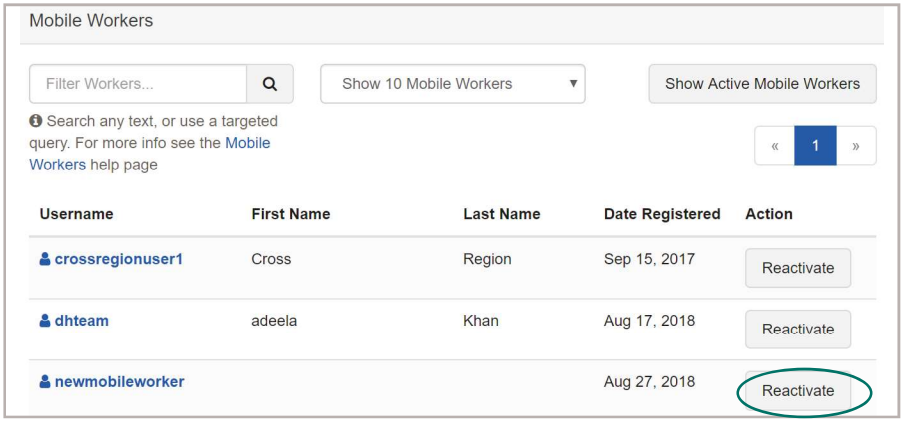
Reactivate Mobile Workers

If a Mobile Worker returns to the program and needs access to view and enter patient information, they will need to be reactivated.

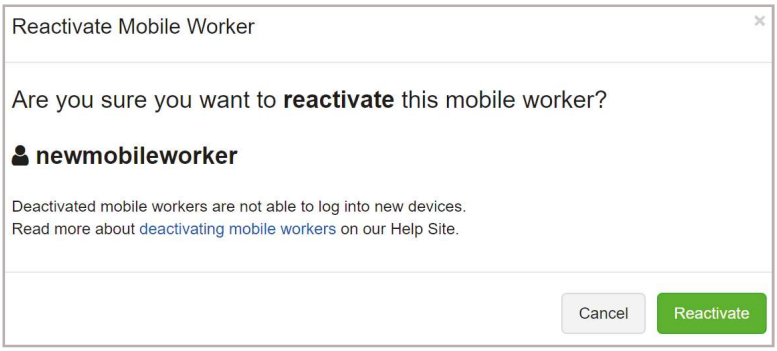
1. Select **Mobile Workers** from the Users dropdown list at the top of the menu bar.
   - » A list of active Mobile Workers will appear in a list.
   - » The inactive Mobile Workers will not appear.
2. Select **Show Deactivated Mobile Workers** to see Mobile Worker that have been deactivated.



3. Select **Reactivate** next to the Mobile Worker that must be reactivated.



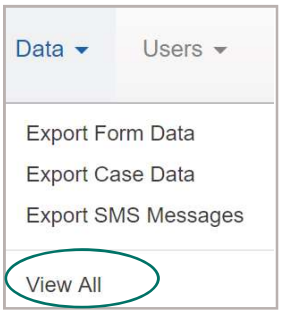
4. Confirm reactivation.

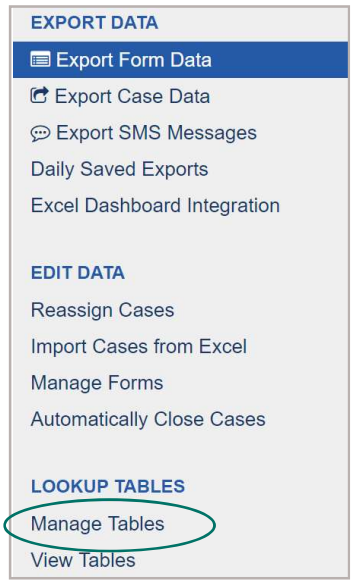


Creating and Editing Surgeon Tables

The TT Tracker utilizes a lookup table to document the surgeon conducting surgery and follow-up activities, enhancing the analysis capabilities of surgical outcomes. The surgeon lookup table must be kept up-to-date; program staff need to report changes and updates regularly.

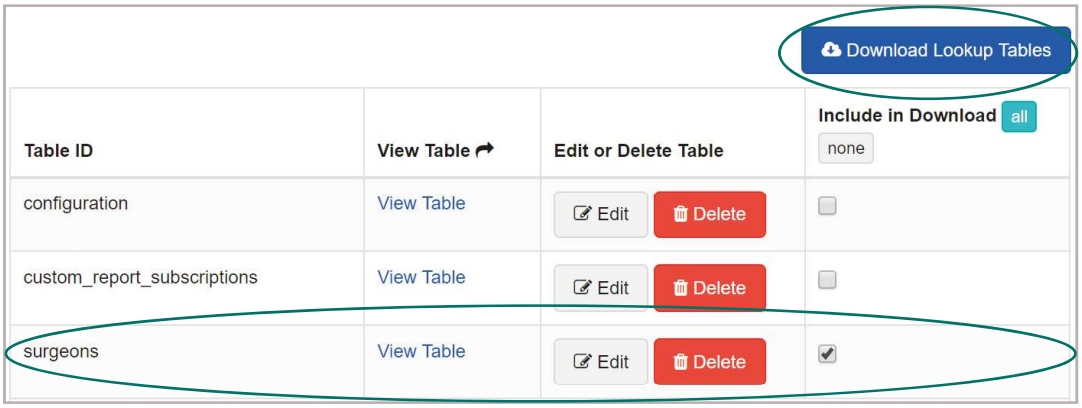
1. Select **View All** from the Data menu at the top of the screen.
2. Select **Manage Tables** under Lookup Tables category.
   - This will reveal all related tables (configuration and surgeons)
   - You will only need to update the Surgeons table; the Configuration table should be left untouched.



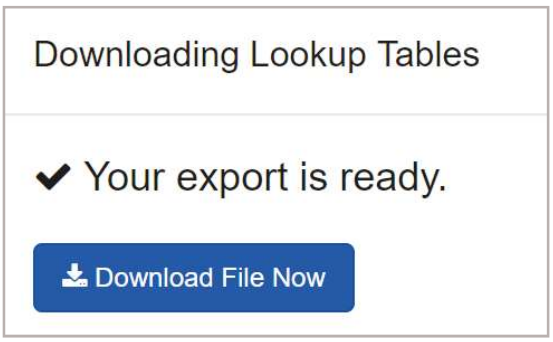


> *You can view the current surgeon table by selecting **View Tables**, however, to make modifications to the Surgeon Lookup table, you must use the download and upload features under **Manage Tables**.*

3. Tick the box for Include [Surgeons] in Download then select **Download Lookup Tables**.



4. Select **Download File Now** which will download Surgeon Table into Excel.



5. Two tabs will be visible in the export: types and surgeons. User should only modify the surgeons tab; **types should remain unchanged**.
   - The export will provide the formatting requirements for new surgeons. If you are uploading a surgeon list for the first time, the list will be blank, except for the Unknown surgeon. This will help you see the format for filling in the surgeon table.
6. Variables in the export

	A	B	C	D	E	F	G	H
1	UID	Delete(Y/N)	field: surgeon_id	field: surgeon_name	field: site_code	field: sort_value	field: email	field: surgeon_inactive
2	e5ab2c98d4cf4ce9a3305261e429e6a6	N	4	Carol Burnett		Burnett, Carol	cburnett@mailer.com	0
3	9e2f033f384e481ab2b825625d6b52be	N	5	Chris Chross	alpha	Chross, Chris	cchross@gmail.com	0
4	29f8809c55b94983861e7585dde2f162	N	6	Dennis Duffy	beta	Duffy, Dennis	dduffy@mailer.com	0
5	63742d92f8dc4b9790e2153dfb80bbc3	N	7	Floyd DeBarbour	beta	DeBarbour, Floyd	fdebarb@mailer.com	0
6	9ee88304a97c4563b8d7211d7ba4b9dc	N	8	Dr Drew Baird	alpha	Baird, Drew	dbaird@gmail.com	0
7	f1252abb00ab40d68a97b522dd9f0f95	N	9	Wesley Snipes	alpha	Snipes, Wesley	wsnipes5@email.net	0
8	71fa4b82d65247a6adcc5b24218ce446	N	0	Unknown / Not listed		zzzzzzzzzz		0

- **UID:** This is the unique ID provided to each surgeon by the TT Tracker. When new surgeons are added, this column should remain blank.
- **Delete (Y/N):** This column can be used to **PERMANENTLY** remove surgeons from the lookup table. To delete surgeons from appearing in the lookup table, enter **Y** in. When adding a new surgeon (or updating information for a surgeon who should remain on the list), this should be **N** or blank.

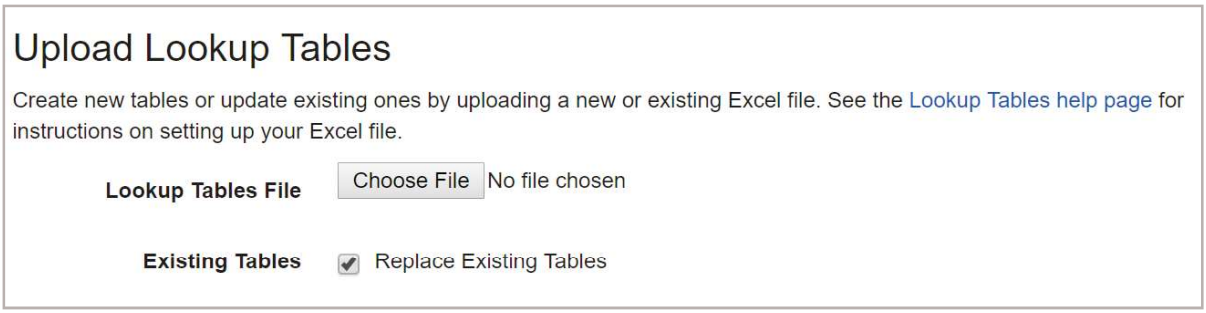
> *This will prevent reports to be conducted on historical surgeries conducted by surgeon. This should NOT be used if surgeon was active; it should only be used if a surgeon was added in error and did not conduct any surgery for the program.*

- **Field: surgeon_id:** This is the surgeon ID provided to each of the surgeons; it will be automatically generated. When adding a new surgeon to the table this should remain blank.
- **Field: surgeon_name:** Enter the surgeon's name how it will appear in the lookup table.
- **Field: site_code:** Leave blank/untouched.
- **Field: sort_value:** Leave blank.
- **Field: email:** If a surgeon has an email, it should be entered in this field. This will allow the surgeons to receive a monthly automated report based on their productivity and outcome assessments.
- **Field: surgeon_inactive:** If a surgeon is no longer active in a program, they should **NOT** be deleted. They should be assigned to **INACTIVE** by entering **Y**. Surgeons will be removed from the pull-up list on the phone, but reports will still show their previous surgical activities.

Tips and Tricks

Surgeon ID will be in numerical order--if a surgeon is DELETED from the system, the next surgeon added will assume the surgeon ID created for the deleted surgeon. It is best practice to always DEACTIVATE surgeons who have left the program to avoid reporting issues for surgeons.

7. Once all changes have been made, save the document and prepare for upload.
8. Select **View All** from the Data menu at the top of the screen.
9. Select **Manage Tables** under Lookup Tables category.
10. Select **Choose File** under Upload Lookup Table.
    » Locate the edited Excel document.
11. Tick **Replace Existing Data Tables** which will replace the existing data table with the new edited version with additions and updates.



12. Select 

13. Once the system has confirmed that the table was uploaded, select Return to Manage Tables to confirm the upload has been completed correctly.
    » Option 1: Select **View Table** to confirm that the information has been saved correctly
    » Option 2: Download the surgeon table to review in Excel.

Accessing Information

There are various ways to access program information in the TT Tracker. Note that identifiable information of both patients and surgeons can only be accessed using the CommCare portal. This is an effort to decrease the risk of unauthorized access. De-identified summary information can be accessed through Metabase, a data visualization tool. This section reviews the ways in which you can access patient data, access reports, and modify data.

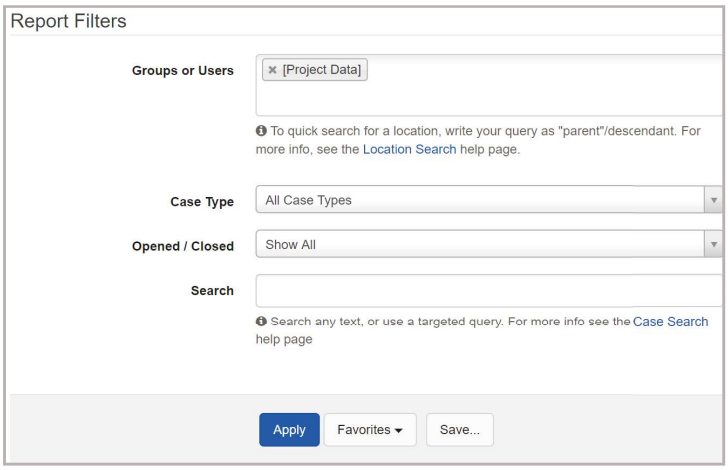
CommCare

All idenfiable patient information can be found in CommCare. It is possible to review a single patient record or export an entire list of patients, depending on the program's needs.

Viewing Single Patient Records

To view a single record with all related forms and changes completed for the given record, use the **Case List** feature.

1. Select **View All** from the Reports menu at the top of the screen.
2. Select **Case List** under Inspect Data.
   » Report filters will be made available, with default search settings.



Groups or Users: *Defaults to all data collected within the TT Tracker (Project Data). Can be modified to include specific locations or Mobile Workers.*
Case Type: *Select to review case lists for Patients. If no specific type is selected, all case types (both Sessions and Patients) will be searched.*
Opened/Closed: *To view only Patient cases that are open or closed, use the drop-down menu to select "Only Open" or "Only Closed". If no selection is made, all cases will appear.*
Search: *Use the search to locate the name of the patient to review.*

3. After searching for the patient, select the file to be reviewed.
4. The summary of the case will appear with up to three tabs: **Case Properties**, **Case History,** and **Related Cases**. If there are no related cases, Related Cases will not appear as one of the tabs.

» **Case Properties:** Information that has been added to that given case will be included in the case properties summary.

Case Properties | Case History | Related Cases

acm oral given	1	age	66	evaluation date	2018-07-30	evaluation notes	
left eye suspected tt	0	left operation performed	0	left visual acuity		patient district id	23eb4f5a69ff4e2c
patient district name	Beta Three	patient id	AA0011	patient id manual entry not found	1	patient phone owner	no_phone
patient region id	da0b274a8d9c491784f71500c73536ad	patient region name	Beta	patient village name	Beta	phone contact	no_phone
phone number		registration notes		right epilation evidence	1	right eye suspected tt	1

Provides a snapshot of the information collected for the case. Some of the key information (i.e. Patient ID, District, Age, etc.) are included to confirm patient identity.

» **Case History:** All forms completed/edited for the case will appear in Case History. Forms will appear in the order they were submitted in the TT Tracker. This keeps track of changes that are made to a case and allows you to delete (archive) a form that has been incorrectly submitted.

Case Properties | Case History | Related

Received (UTC)	Form	User
2018-08-23 14:34	TT Tracker > Patient Management > Record Surgery	kjensen
2018-08-17 11:10	System Form	zahid.awan
2018-08-14 23:39	TT Tracker > Patient Management > Record Surgery	kjensen12
2018-08-14 23:39	TT Tracker > Patient Registration > Patient Registration	kjensen12

Received (UTC)	Form	User
2018-11-06 01:18	http://commcarehq.org/hq_case_update_rule	system
2018-11-05 20:06	TT Tracker > Patient Management > Record Surgery	kjensen
2018-09-14 07:05	TT Tracker > Patient Management > Record Surgery	trackerpractice8
2018-08-14 20:13	TT Tracker (old, do not use) > Patient Management > 7 14 Day Follow Up	kjensen12

Form Properties | Case Changes | Form Metadata | Raw XML

View standalone form | Clean Form Submission | Archive this form

Labels | Question IDs

Show questions in form that were not shown to the user

Question	Response
This patient has an existing surgery form completed--to update and REPLACE existing information, continue.	OK
Date of the surgery	2018-04-03
Surgeon performing the operation	10

Through Case History, you can archive forms that were in error so they will not appear in reports.
*See **Archive Records***

» **Related Cases:** All cases (Patients or Sessions) that are related to the selected case under review will appear in Related Cases.

→ If you're reviewing a patient record, the Session under which the patient was registered and the other patients that were registered under the same Session will appear in Related Cases.

Case Properties | Case History | Related Cases

Name		Status	Case Type	Owner	Date Opened
▼ BHU 2	View	Open	Surgery_Session	Beta One	Aug 16, 2018 12:06 UTC
Stephen Bernard	View	Open	Patient	Alpha One	Aug 14, 2018 20:56 UTC
Josefina Esther		Open	Patient	Alpha One	Aug 14, 2018 23:39 UTC

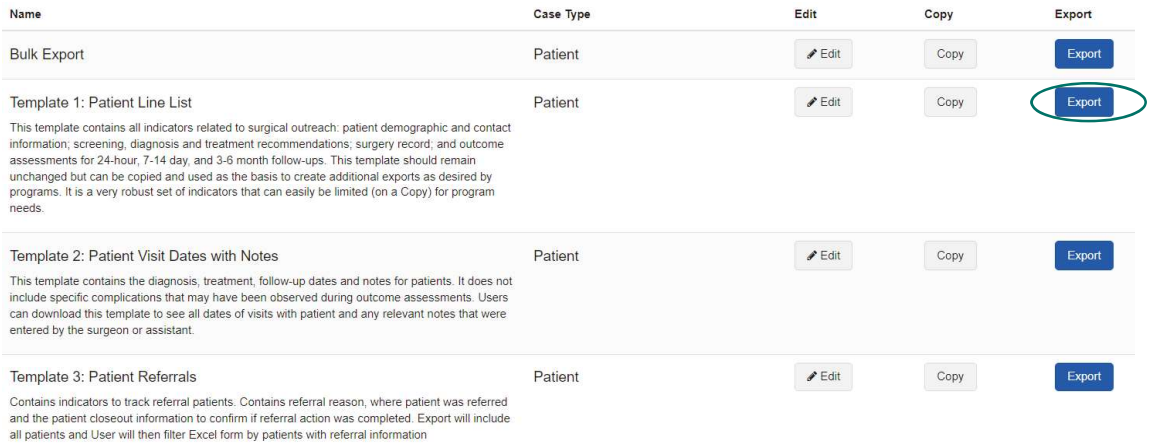
CommCare Line List Exports

Data collected via the TT Tracker can be exported into Excel for further analysis; the Exports feature in CommCare allows you to download all or a selected subset of variables. Exports let you view a line list of patients with the relevant indicators related to TT interventions and follow-ups. You can limit the export to select location(s) and/or time period.

A select number of export templates will be created and formatted for each program in order to simplify the steps required to download data: Patient Registration, Evaluation, Surgical, and Follow-up information. This will allow you to access any patient's full record if needed. These templates can be modified as needed, and additional automated exports can be created and saved.

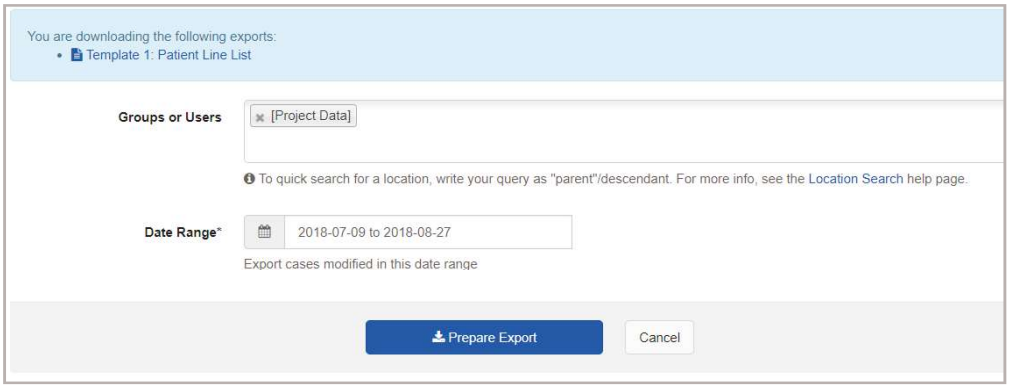
Download Existing Report

1. Select Export Case Data from the Data menu at the top of the screen.
2. Select **Export** for the saved export that you want to download. The following templates will be saved for program use.
   - » Template 1: Patient Line List: This template contains all indicators related to surgical outreach: patient demographic and contact information; screening, diagnosis and treatment recommendations; surgery record; and outcome assessments for 24-hour, 7-14 day, and 3-6 month follow-ups. This template should remain unchanged but can be copied and used as the basis to create additional exports as desired by programs. It is a very robust set of indicators that can easily be limited (on a Copy) for program needs.
   - Template 2: Patient Visit Dates with Notes: This template contains the diagnosis, treatment, follow-up dates and notes for patients. It does not include specific complications that may have been observed during outcome assessments. Users can download this template to see all dates of visits with patient and any relevant notes that were entered by the surgeon or assistant.
   - Template 3: Patient Referrals: Contains indicators to track referral patients. Contains referral reason, where patient was referred and the patient closeout information to confirm if referral action was completed. Export will include all patients and User will then filter Excel form by patients with referral information.
   - » Templates A, B, and C: Used by data managers for data cleaning.



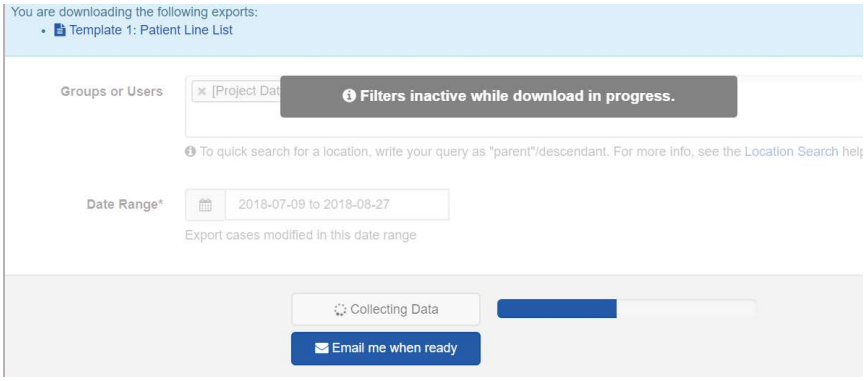
Name	Case Type	Edit	Copy	Export
Bulk Export	Patient	Edit	Copy	Export
Template 1: Patient Line List This template contains all indicators related to surgical outreach: patient demographic and contact information; screening, diagnosis and treatment recommendations; surgery record; and outcome assessments for 24-hour, 7-14 day, and 3-6 month follow-ups. This template should remain unchanged but can be copied and used as the basis to create additional exports as desired by programs. It is a very robust set of indicators that can easily be limited (on a Copy) for program needs.	Patient	Edit	Copy	Export
Template 2: Patient Visit Dates with Notes This template contains the diagnosis, treatment, follow-up dates and notes for patients. It does not include specific complications that may have been observed during outcome assessments. Users can download this template to see all dates of visits with patient and any relevant notes that were entered by the surgeon or assistant.	Patient	Edit	Copy	Export
Template 3: Patient Referrals Contains indicators to track referral patients. Contains referral reason, where patient was referred and the patient closeout information to confirm if referral action was completed. Export will include all patients and User will then filter Excel form by patients with referral information	Patient	Edit	Copy	Export

3. Define the Export
   - **Groups or Users:** It is possible to limit the data export to include only a designated program area (Region or District).
   - **Date Range:** The export will automatically export information from the first day of data collection through present day, but you can select a limited timeframe if needed.



The date used for Date Range will be the date the record was created, which will likely be the date the patient was evaluated (and possibly operated).

4. Once the criteria have been set, select **Prepare Export**.



Tips and Tricks

If the file preparation is delayed due to the size of the file and/or a slow connection, you can request an email notification when the export has been prepared and is ready for download.

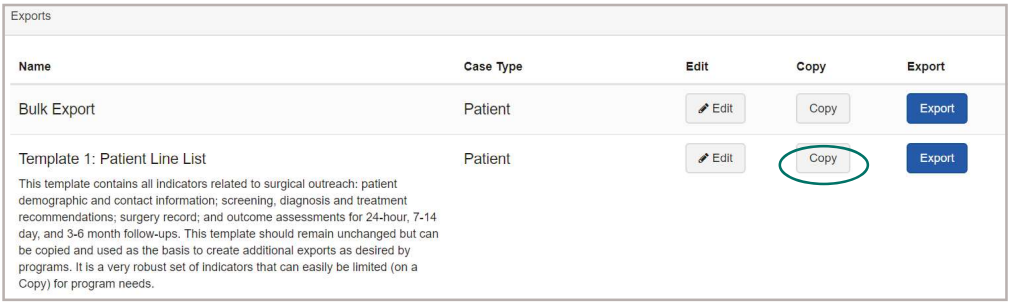
5. Select Download
   - The file will be downloaded in the format that was established during export creation (often is Excel, though CSV is optional).

*Variable names have been edited from their original names so reports are easier to read and interpret. Remember to look to the **Indicator Definitions** list to see both the original and edited names.*

Creating Export from Existing Template

If you want to use a template as the basis for a new export, you will need to make a copy of the existing template.

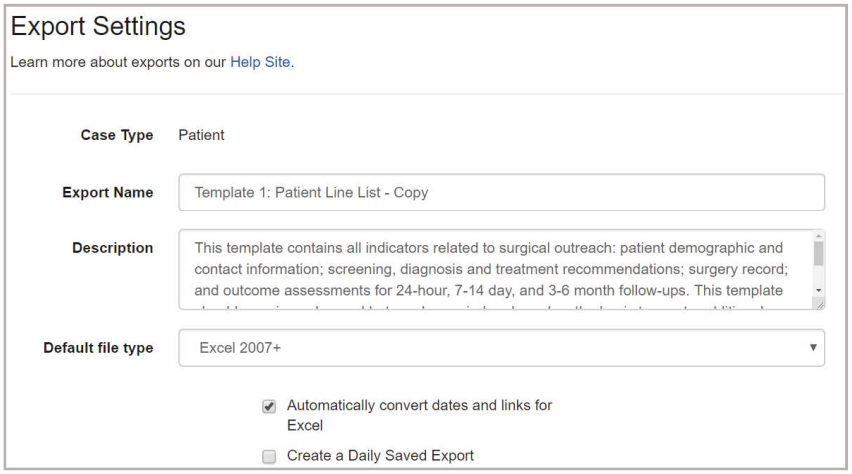
1. Select **Export Case Data** from the Data menu at the top of the screen.
2. Select **Copy** for the saved export that you want to modify.



Do not make changes to the Template; there are users who may need the original Template.

   - The copy will appear below the original version, renamed as **[Original File Name] - Copy.**

3. To modify the copy, select **Edit**.
4. Modify the **Export Settings**.
   - **Case Type:** Within the TT Tracker system there are two case types: Session and Patient.
   - **Session Cases:** All sessions created within a coverage area.
   - **Patient Cases:** All patients within the TT Tracker.
   - **Export Name:** You can modify the name of the export. ***Make sure to change the name of the new file so that it will not be confused with the template copied.***
   - **Default file type:** Files can be exported in CSV, Excel (older versions), or Excel (2007). All pre-existing templates have been established with Excel 2007 as default file type.
   - **Automatically convert dates and links for Excel:** This box is ticked so that all information collected through the TT Tracker will be converted into a usable format for Excel.
   - **Create a Daily Saved Export:** If a created report must be accessed daily and thus information should be updated every 24 hours, you can choose to Create a Daily Saved Export.

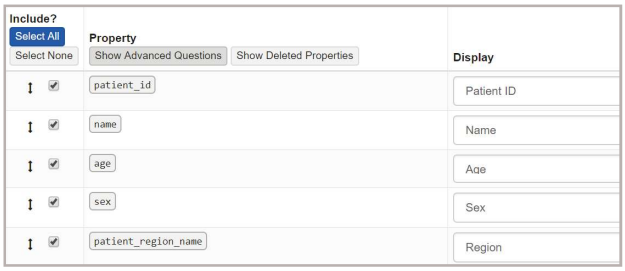


5. Modify Case Information

» **Export Variables**

→ Variables will appear in the order that they appear in the export with a ticked box to the left of each.

→ Variables not included in the export are located at the bottom of the list with an unchecked box.



» **Adding/removing Variables**

→ To add a variable to the export, tick the box. Once saved the selection will be added to the bottom of the included variables.

→ To remove a variable, simply uncheck the box.

» **Moving Variables**

→ Variables can be moved before or after the addition has been saved to the export.

→ To move the variable, click the two-way arrow to the far left of the checkbox and move it into position.

» **Renaming Variables**

→ Variables can be renamed so that the variable heading in Excel is different than what appears in CommCare

→ Select the Display box for the selected variable and edit the name as needed.

Tips and Tricks

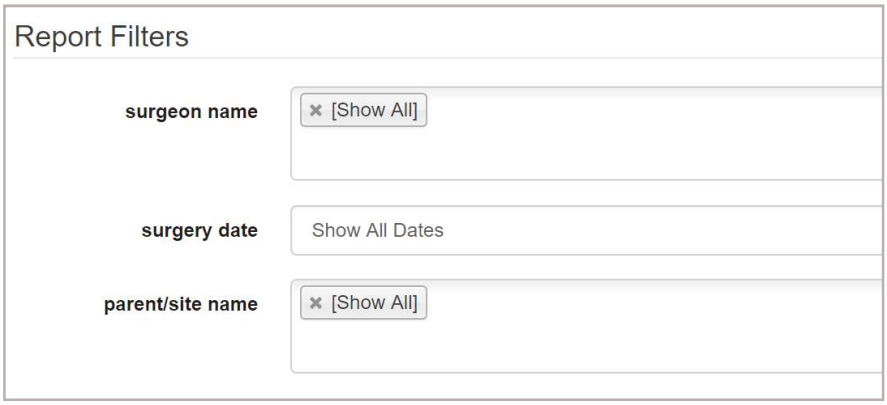
Use the Indicator Definitions document to see variable names as they appear in CommCare and the name as it appears in Templates. Use the renamed variables and/or keep a program-specific document up-to-date to ensure exports are clear to all users.

CommCare Report Builder

The CommCare Report Builder is similar to patient line lists in that the identifiable patient information can be exported into Excel and manipulated as needed. However, these reports offer greater capability in customization due to the ability to limit a report by designated criteria, such as by surgeon, location, or specific patient. The ease and efficiency with which an export can be produced is also greater with the Report Builder.To assist programs in efficient data exports, pre-populated reports have been saved for each program and can be viewed and exported by anyone granted access to CommCare. Users can easily modify existing reports, or create new reports, depending on program needs.

Accessing Existing Reports

1. Select **View All** from the Data menu at the top of the screen.
   - » A list of saved reports will be listed below Reports.
2. Select the report to be viewed.
   - » Any report filters that have been created for the report will appear at the top of the screen.



Multiple filters can be applied to one report.

Example: *The report can include records for patients operated by a specific surgeon, during a given period of time, and/or at a specific outreach site.*

3. Select the filters that should be applied to the report.
   - » If no changes are made to the filters, all information will appear.
4. Select Apply
   - » The report will appear on the screen and can be exported to Excel be selecting **Export to Excel**.

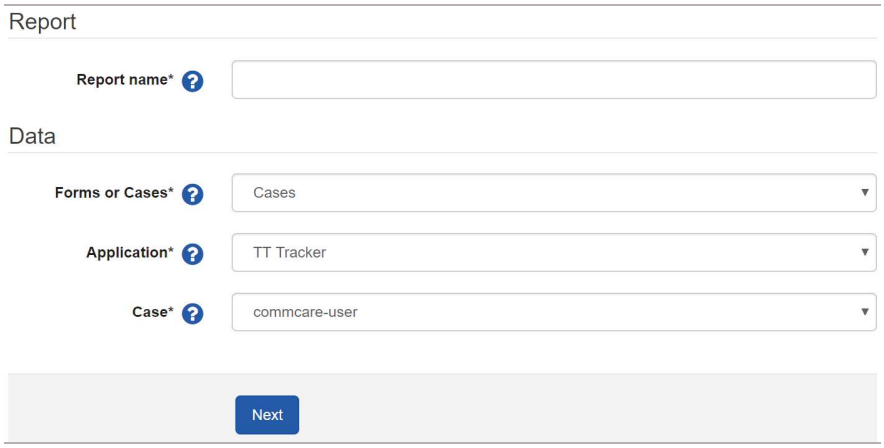
Name	Patient ID	Patient District	Patient Village	Eval Date	Outreach Site	RE Action	LE Action
Beta Patient	AACR1	Beta One	Betavillage		Beta One Static Site	offered_surgery_patient_accepted	offered_surgery_patient_accepted
dilshad bano	AAFG3	Beta One	Gambella	2018-04-15	Beta One Static Site	offered_surgery_accepted	recommend_epilation
Gabriel Mata	AA002	Beta One	Terkudi	2018-04-09	Beta One Static Site		offered_surgery_accepted
Zahid Sana	AACE3	Beta One	gambrella village	2018-04-15	Beta One Static Site	offered_surgery_accepted	recommend_epilation

Create New CommCare Report

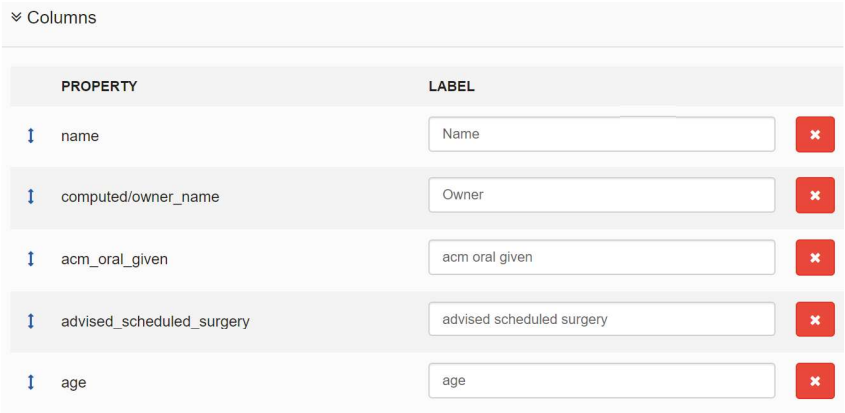
1. Select **View All** from the Data menu at the top of the screen.
2. Select **Create New Report**.
3. Complete the Basic Report Information.
   - » **Report Name:** Provide a name for the report which will appear in the reports list if saved for a later date
   - » **Forms or Cases:** Select Cases—this will select the full patient record (a collation of all of the forms related to each patient)
   - » **Application:** Select TT Tracker.
   - » **Case:** Select Patient—this will ensure that the collation of indicators to be added to a report will be those relevant to the patient records and not CommCare users or created Sessions.

Tips & Tricks

Patient Cases will be the type of report most often created. However, it is possible to create a list of Sessions by selecting Session for Case and following the same steps.



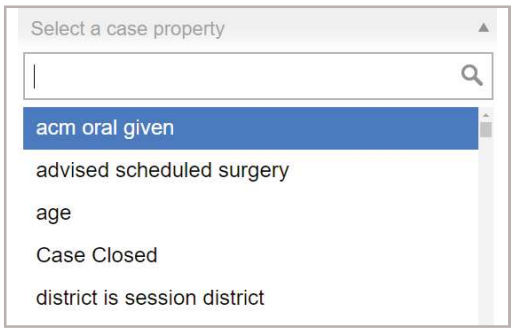
4. Select **Next**
5. Add indicators to the report under Case → List Columns.

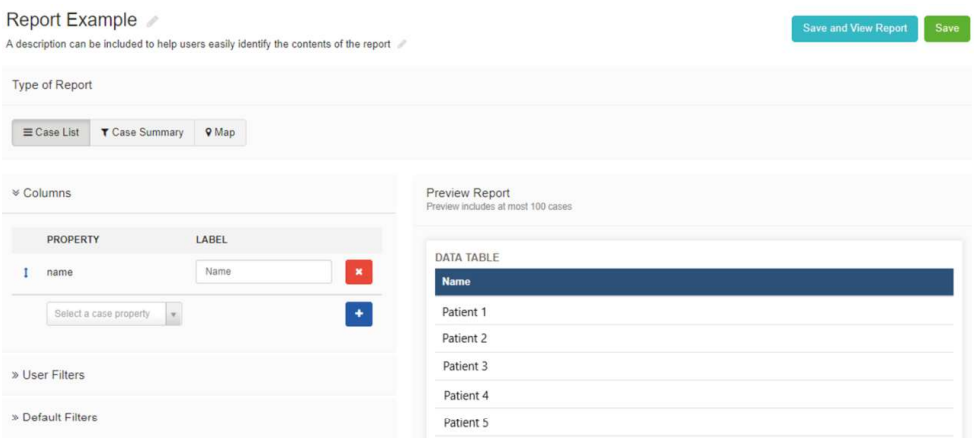


CommCare will automatically include select variables that you may not want in the report. Before adding new variables, remove the unwanted variables.

To remove unwanted variables select ✖

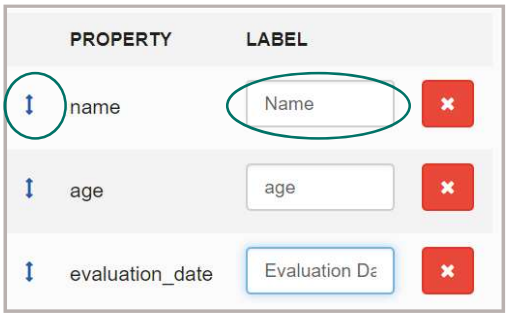
- » To add variables to the report, click in the box **Select a case property** and select from the list. Start typing the variable to limit the list to a smaller number.
- » Once the indicator is selected, select to add it to the list of variables to appear in the report.

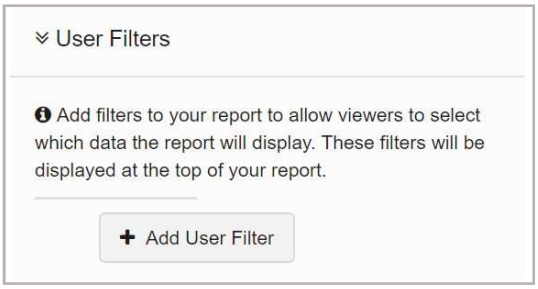


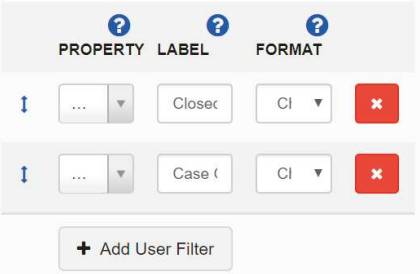


As indicators are added, the sample report will populate with the new indicators so you can see what the report will look like. Up to 100 records will appear in the list.

6. To rearrange the order of indicators, use the bidirectional arrow to the left of the indicator to move it up or down.
7. To rename the label of the indicators that will appear in the report, type the new name in Label.
8. Add **User Filters** that can be applied to limit the report to a select group of records.







When selecting User Filters, there may be filters automatically applied that can be removed with the red X.

9. Select **Add User Filter**
   - **Property**: The indicator that appears in CommCare.
   - **Label**: The label that will appear with the filter selection of the report
   - **Format**: Allows you to select either a **Date** or date range (for indicators that are date-related) or **Choice** which allows you to select the specific filter (i.e. the name of a surgeon or a district).
10. Add the filters of your choice.

> ***Tips and Tricks***
> It is NOT required to use all filters at once, even if they are included as filter options for a report. You can choose to filter by no filters, one filter, or multiple filters that have been included for the report.

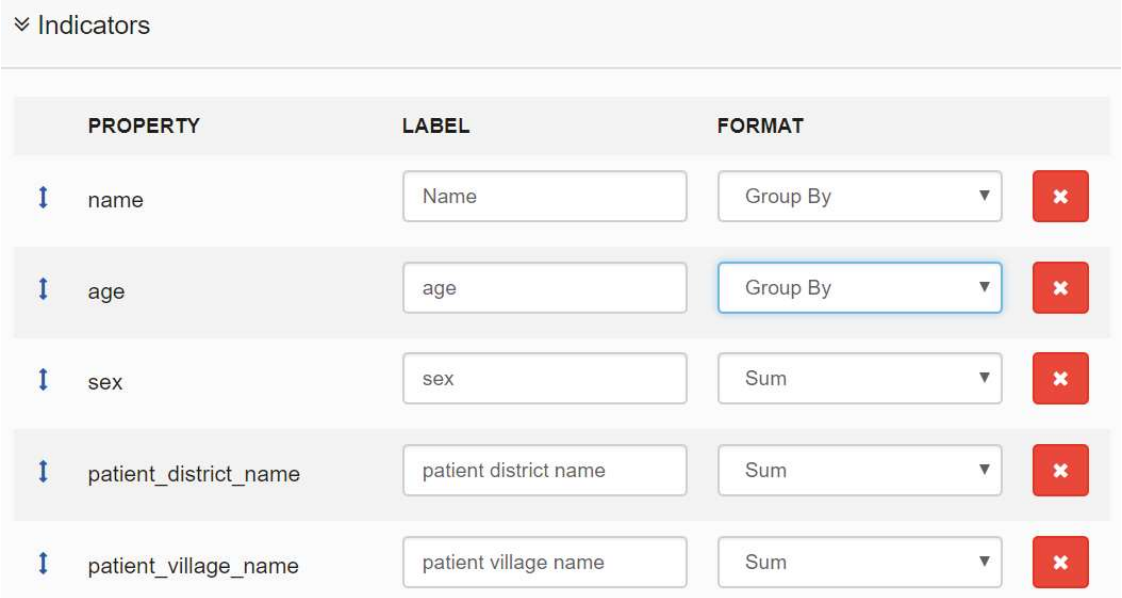
11. To save the report and/or export to Excel, select **Save and View Report**.

> ***Note:*** *Each country project is permitted to have FIVE saved reports within the CommCare Report Builder tool. If five reports are already saved to the country project, if a new report is to be created, one of the existing five must be deleted. Programs should discuss report saving and deleting guidelines.*

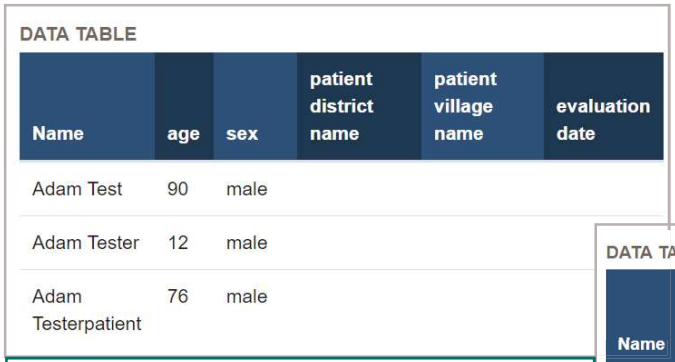
Troubleshooting: Reports not Populating Correctly

If data is not showing up correctly (i.e. the columns are blank or columns are filled with 1 or 0), it may be that there is an issue with the Case Summary determination.

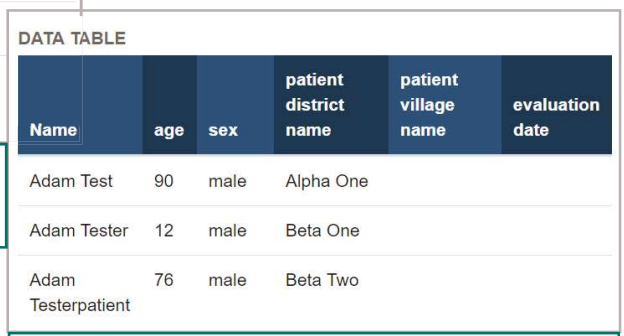
1. Select **Edit Report**.
2. Select **Case Summary**.
3. Select the arrow next to **Indicators** to expand the selection.
4. Change the Format for all indicators to **Group By**.



» Changes should be visible immediately in the Preview Report to the right of the Case Summary selection.



*Information visible after selecting **Group By** for Sex*



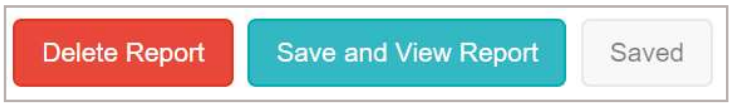
*Information visible after selecting **Group By** for Patient District*

Editing Existing CommCare Report

1. Select **View All** from the Data menu at the top of the screen.
2. Select the report to be viewed.

3. Select 

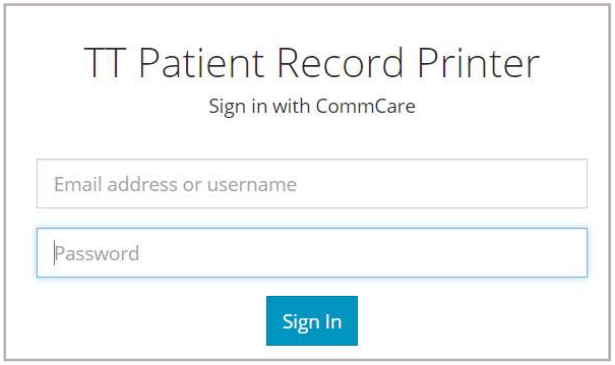
4. Follow the same steps described in **Create New CommCare Report.**
5. To DELETE report, select **Delete Report**.



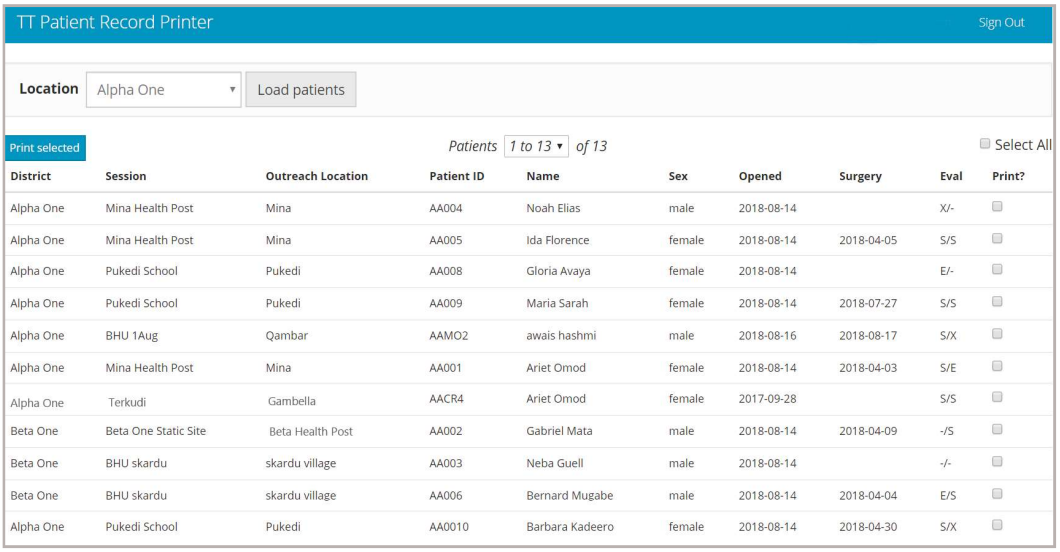
PDF Exporter

The PDF Exporter allows you to print a single patient record or a collection of patient records in a one-page PDF summary.

1. Access your program specific PDF Exporter portal.
   - **https://tt-tracker-reporter-preview.herokuapp.com/tt-tracker-[country]**
2. Log in using your CommCare Web User password and username.
   - Once logged in, all records to which you have access will be visible.
3. To limit the number of records to only show those within a designated district, select the District from the Location menu and select Load Patients.

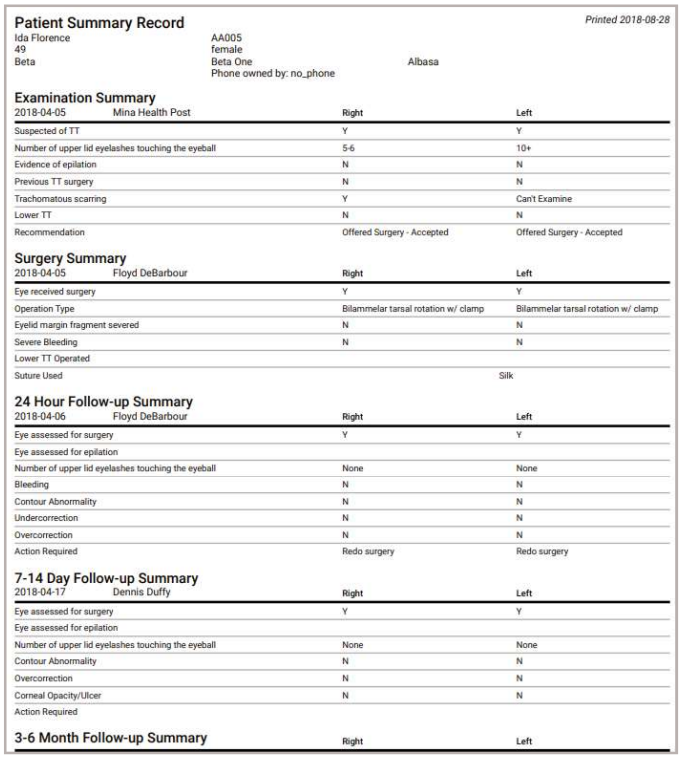


All patients within the district selected will appear in the list, along with the Session where they were evaluated, the recommended action for each eye, and the date of surgery, if applicable.



District	Session	Outreach Location	Patient ID	Name	Sex	Opened	Surgery	Eval	Print?
Alpha One	Mina Health Post	Mina	AA004	Noah Elias	male	2018-08-14		X/-	
Alpha One	Mina Health Post	Mina	AA005	Ida Florence	female	2018-08-14	2018-04-05	S/S	
Alpha One	Pukedi School	Pukedi	AA008	Gloria Avaya	female	2018-08-14		E/-	
Alpha One	Pukedi School	Pukedi	AA009	Maria Sarah	female	2018-08-14	2018-07-27	S/S	
Alpha One	BHU 1Aug	Qambar	AAMO2	awais hashmi	male	2018-08-16	2018-08-17	S/X	
Alpha One	Mina Health Post	Mina	AA001	Ariet Omod	female	2018-08-14	2018-04-03	S/E	
Alpha One	Terkudi	Gambella	AACR4	Ariet Omod	female	2017-09-28		S/S	
Beta One	Beta One Static Site	Beta Health Post	AA002	Gabriel Mata	male	2018-08-14	2018-04-09	-/S	
Beta One	BHU skardu	skardu village	AA003	Neba Guell	male	2018-08-14		-/-	
Beta One	BHU skardu	skardu village	AA006	Bernard Mugabe	male	2018-08-14	2018-04-04	E/S	
Alpha One	Pukedi School	Pukedi	AA0010	Barbara Kadeero	female	2018-08-14	2018-04-30	S/X	

4. Tick the box for the records that you want to download, or tick the Select All box that will select all records in the selected District or the entire collection of records.
5. Once the desired records are selected, select Print Selected.
   - All selected records will be downloaded into a single PDF file that can be printed as needed.
   - The date of export is recorded on the document.



Patient Summary Record *Printed 2018-08-28*

Ida Florence
49
Beta
AA005
female
Beta One
Phone owned by: no_phone
Albasa

Examination Summary

2018-04-05 Mina Health Post	Right	Left
Suspected of TT	Y	Y
Number of upper lid eyelashes touching the eyeball	5-6	10+
Evidence of epilation	N	N
Previous TT surgery	N	N
Trachomatous scarring	Y	Can't Examine
Lower TT	N	N
Recommendation	Offered Surgery - Accepted	Offered Surgery - Accepted

Surgery Summary

2018-04-05 Floyd DeBarbour	Right	Left
Eye received surgery	Y	Y
Operation Type	Bilammelar tarsal rotation w/ clamp	Bilammelar tarsal rotation w/ clamp
Eyelid margin fragment severed	N	N
Severe Bleeding	N	N
Lower TT Operated		
Suture Used		Silk

24 Hour Follow-up Summary

2018-04-06 Floyd DeBarbour	Right	Left
Eye assessed for surgery	Y	Y
Eye assessed for epilation		
Number of upper lid eyelashes touching the eyeball	None	None
Bleeding	N	N
Contour Abnormality	N	N
Undercorrection	N	N
Overcorrection	N	N
Action Required	Redo surgery	Redo surgery

7-14 Day Follow-up Summary

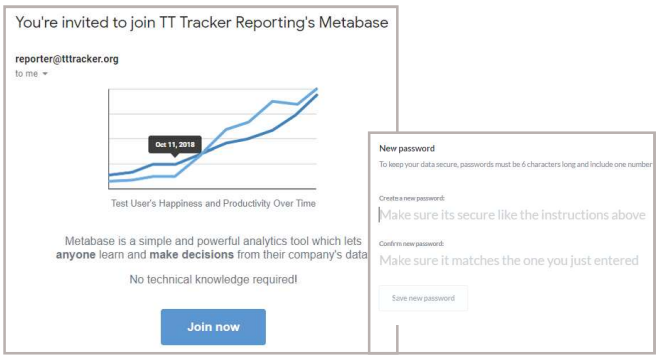
2018-04-17 Dennis Duffy	Right	Left
Eye assessed for surgery	Y	Y
Eye assessed for epilation		
Number of upper lid eyelashes touching the eyeball	None	None
Contour Abnormality	N	N
Overcorrection	N	N
Corneal Opacity/Ulcer	N	N
Action Required		

3-6 Month Follow-up Summary

	Right	Left

Metabase

Metabase is the data visualization tool for TT Tracker; remember that all data housed within Metabase is de-identified. Metabase can be accessed via **https://dashboard.tttracker.org.** Designated users will receive an email invitation to the country-specific project on Metabase.

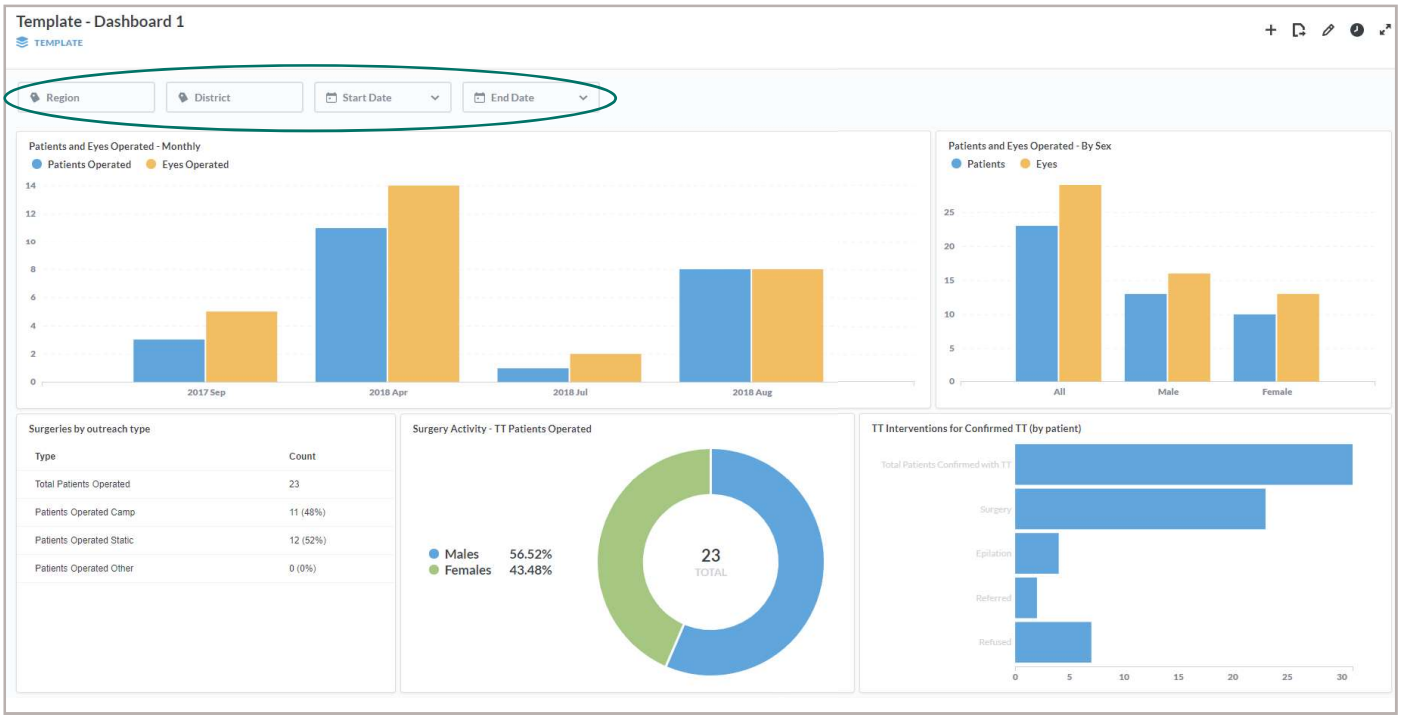


Metabase Dashboard

The tool uses a Dashboard which is a collection of 'queries' saved for the program to give a snapshot of the activities. This allows programs to easily view and access up-to-date reports.
If there are multiple implementing partners in a country program, partners will only see data relevant to their program area, unless otherwise determined by the Ministry; this will be assigned by the Administrator. National Ministries will have access to all country data.

View Dashboard

1. Select the Dashboard you would like to review from the main menu.
   - » All existing dashboards for a project will appear in the list.
     - → Outcome Assessments and Session Activities: Includes summary information related to surgical output and complications at follow-up by district and surgeon.
     - → Surgery and Followup Completion: Includes summary information related to the number of surgeries and follow-ups completed in each district.
     - → DQA: Data Quality Assessment used to support the data cleaning by conducting queries and highlighting where issues need to be addressed.
2. Use the filters to request summary information for a designated location (Region or District) and/or a given time period.



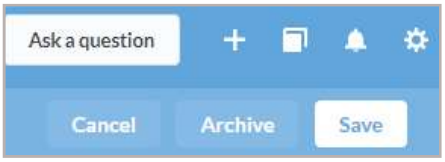
Edit Dashboard

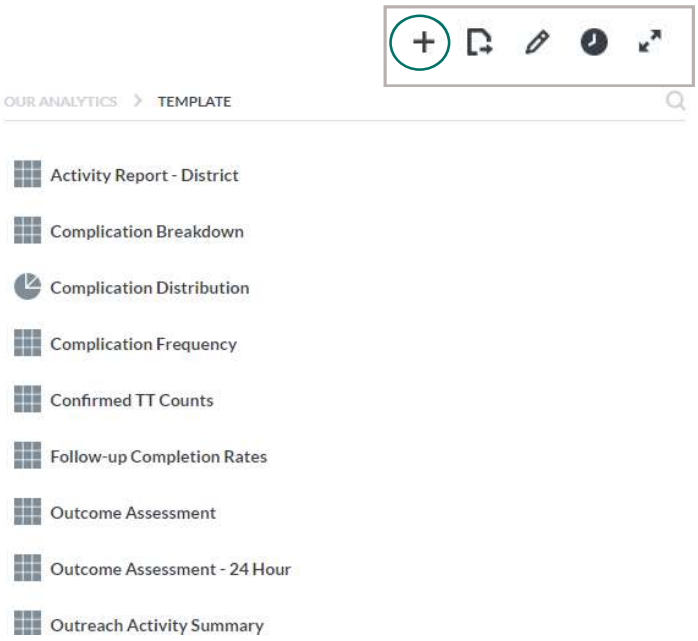
1. After selecting the Dashboard, select the Edit icon. 
2. To remove a query from the dashboard, select the X in the upper right corner of the query to be removed.

Outreach Activity Summary

Type	Count
# Sessions Completed	18
# Surgeons Involved	25
# Surgical Days	70
# Eyes Operated	768
Average Eyes / Surgeon / Day	4.86

3. To move a query, click and drag to a new position.
4. To add a question to the dashboard:
   - » Select + in the upper right corner.
   - » Select the query that should be added to the Dashboard from the list of all queries related to the project.
5. Once selected, resize and move to desired location.
6. Save

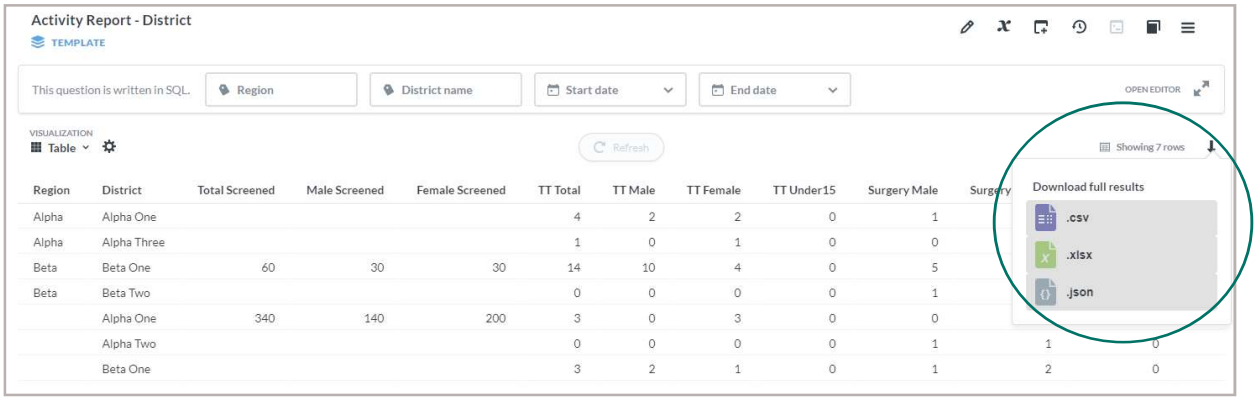




Download Saved Queries to Excel

Saved queries can be downloaded from Metabase into Excel so that users can conduct additional analyses. Though not all queries may be suitable for export, some saved queries have been formatted to provide an easily downloadable summary report into Excel.

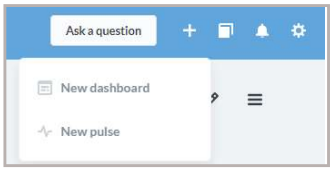
1. Select the Dashboard where the question for download is stored.
2. Click on the title of the query to download.
3. Select the arrow to show the dropdown menu.
4. Select .xlsx (or .csv or .json if desired).



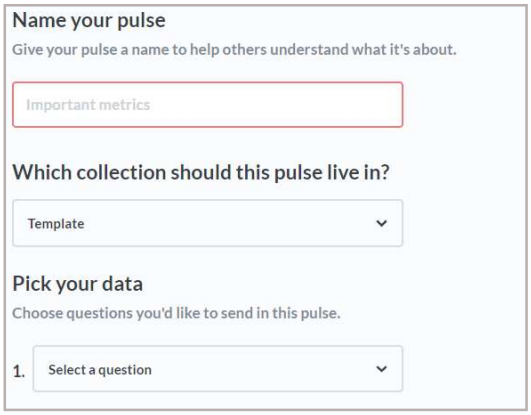
Region	District	Total Screened	Male Screened	Female Screened	TT Total	TT Male	TT Female	TT Under15	Surgery Male	Surgery	
Alpha	Alpha One				4	2	2	0	1		
Alpha	Alpha Three				1	0	1	0	0		
Beta	Beta One	60	30	30	14	10	4	0	5		
Beta	Beta Two				0	0	0	0	1		
	Alpha One	340	140	200	3	0	3	0	0		
	Alpha Two				0	0	0	0	1	1	0
	Beta One				3	2	1	0	1	2	0

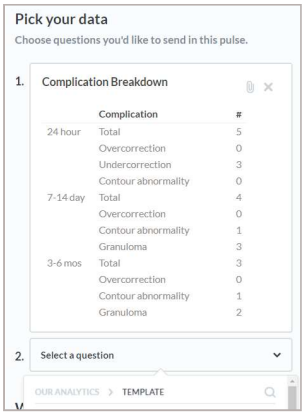
Create Automated Emails or Pulses on Metabase

All saved queries in Metabase can be sent on regular basis to designated individuals. The emails can be sent to individuals who have Metabase accounts and can also be sent to additional emails as designated by the Administrator.

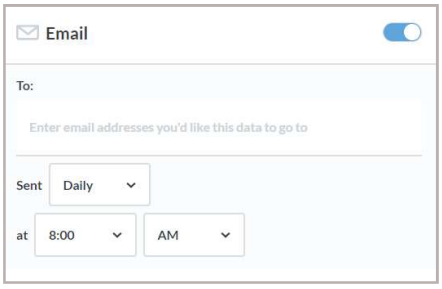


1. Log in to Metabase.
2. From the main project page, select the + for Create in the top right corner.
3. Select New Pulse.
4. Name the emailed report that will be sent.
5. Select the Collection where it should be kept.
   - » If you want to create an email that is just for you, it can be stored on your Personal Collection.
   - » If you select the [Country] project, it will appear on the main page for all [Country] project users can access it.
6. Select the queries that you would like to include in your automated email.
   - » Any query saved to the [country] project can be included in the pulse.
   - » As many questions can be added as desired.
   - » Once selected, a sample of what the report looks like will appear in the lineup.
7. Once queries have been added, select the recipients who should receive the pulse.
   - » This can include Metabase users or emails of individuals without access to Metabase.



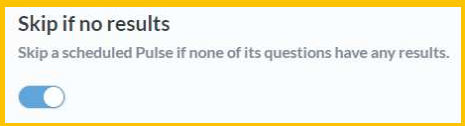


8. Select the frequency and time for the report to be sent.
   - » If desired, the email can be sent immediately, or can simply be saved in the pulse and sent according to the established schedule.
9. Select Create pulse.



Tips and Tricks

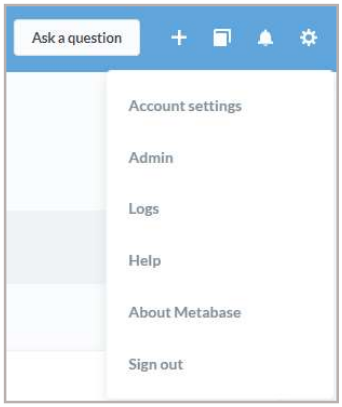
If you do not want reports to be sent if the queries are empty due to no activity, you can choose to Skip if no results.



Add Users in Metabase

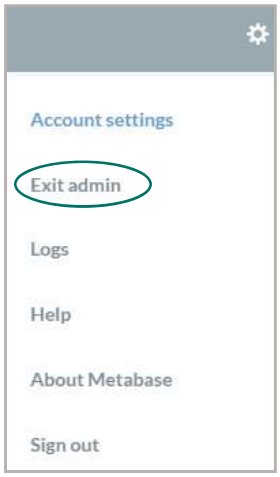
Though all data used in Metabase will be de-identified, access to program data will still be secured with usernames and passwords given to designated individuals requiring access to summary data. You can invite designated users to create an account; the user will then click on the email invite to create a unique username and password.

1. Log in to Metabase.
2. Select the Settings button in the upper right corner.
3. Select Admin Panel



4. Select People

   » A list of existing users will appear in the list with the groups (projects) that they are given permission to view.
5. Select Add Someone
6. Complete the information for the person you would like to add
   » **First and last name**
   » **Email address**: This will be used to send them an invitation and instructions to access their account.
   » **Permission Groups**: Assign the designated group so that the user can only see the collection of data that he/she has permission to view/download. Groups will be available for National and at Regional levels as required.
7. Select Add
8. To leave the Admin Panel and return to the dashboard, select Exit Admin.



Data Modifications

Editing Single Patient Records

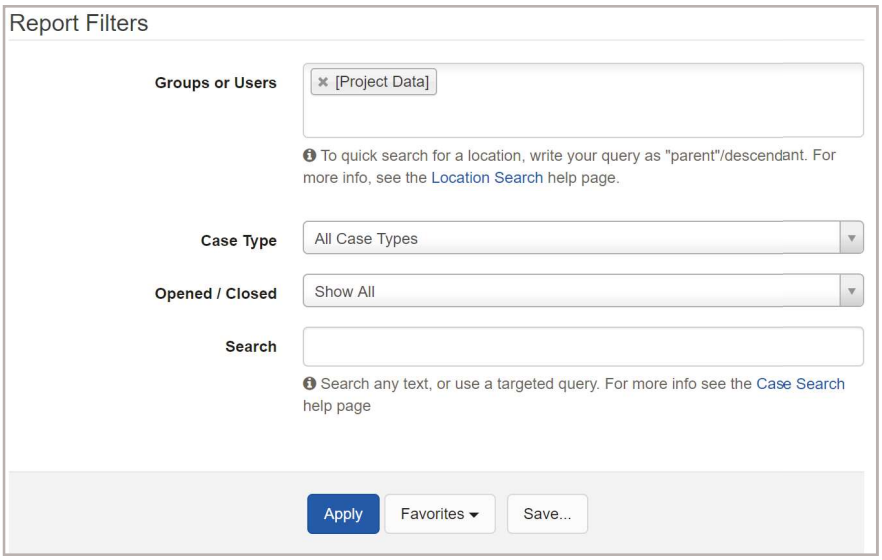
Update Information via Phone or Web App

If a single patient record needs to be edited, you can make modifications to a patient record using the TT Tracker Web or Phone App. Mobile workers or Administrators can correct errors to data entry by re-submitting the patient treatment form that contains the errors; resubmitting the form will overwrite any changes made to the information in the surgical record. To do this, the user must have a Mobile Worker username and password. Access the patient record to be modified using the Patient Management tab and update the form(s) that contain errors. For step-by-step instructions on updating patient records using the phone app, refer to Mobile Worker Manual.

Update Information via Case List

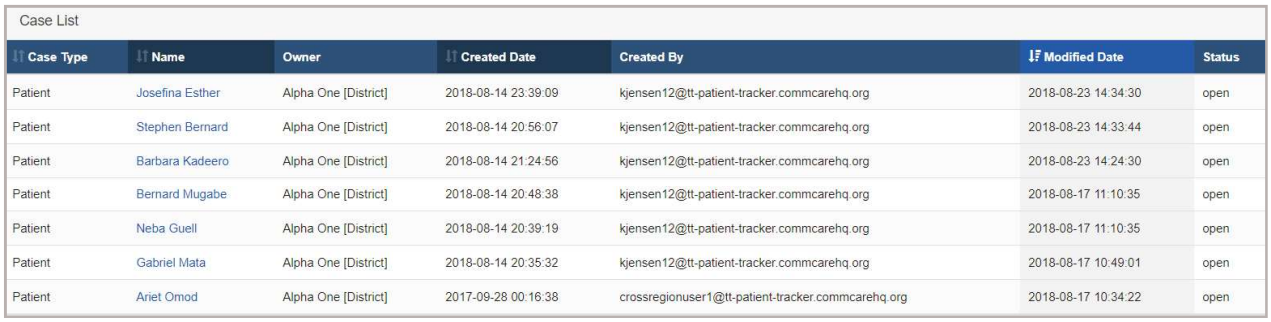
Editing errors in patient information via the TT Tracker Phone or Web App is the safest way to ensure that data modifications are completed according to variable guidelines and logic. However, it is possible to update patient records using Case List.

1. Select Case List from the Reports menu at the top of the page.



- **Group or Users**: Can leave as all Project Data or select a specific Mobile Worker or Location where patient was entered.
- **Case Type**: Select Patient.
- **Open/Closed**: Can leave as all types, or can select Open/ Closed, depending on patient status.
- **Search**: Type patient name to be edited.

2. Once the filters have been added, select Apply.
   - All patients that fit the filter criteria will appear in a list.
3. Select the patient to be edited.

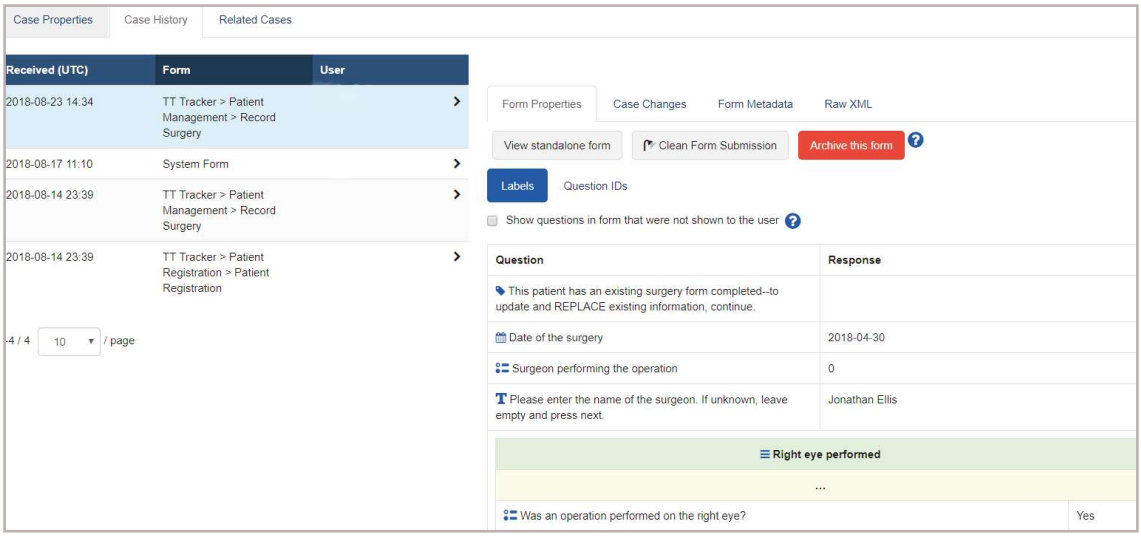


Case List

Case Type	Name	Owner	Created Date	Created By	Modified Date	Status
Patient	Josefina Esther	Alpha One [District]	2018-08-14 23:39:09	kjensen12@tt-patient-tracker.commcarehq.org	2018-08-23 14:34:30	open
Patient	Stephen Bernard	Alpha One [District]	2018-08-14 20:56:07	kjensen12@tt-patient-tracker.commcarehq.org	2018-08-23 14:33:44	open
Patient	Barbara Kadeero	Alpha One [District]	2018-08-14 21:24:56	kjensen12@tt-patient-tracker.commcarehq.org	2018-08-23 14:24:30	open
Patient	Bernard Mugabe	Alpha One [District]	2018-08-14 20:48:38	kjensen12@tt-patient-tracker.commcarehq.org	2018-08-17 11:10:35	open
Patient	Neba Guell	Alpha One [District]	2018-08-14 20:39:19	kjensen12@tt-patient-tracker.commcarehq.org	2018-08-17 11:10:35	open
Patient	Gabriel Mata	Alpha One [District]	2018-08-14 20:35:32	kjensen12@tt-patient-tracker.commcarehq.org	2018-08-17 10:49:01	open
Patient	Ariet Omod	Alpha One [District]	2017-09-28 00:16:38	crossregionuser1@tt-patient-tracker.commcarehq.org	2018-08-17 10:34:22	open

To review the information entered on each form

4. Select Case History
5. Select the activity to review
   - » The form submitted will appear for review.
   - » Forms can be archived and eliminated from reports, if required. **See Archive forms**

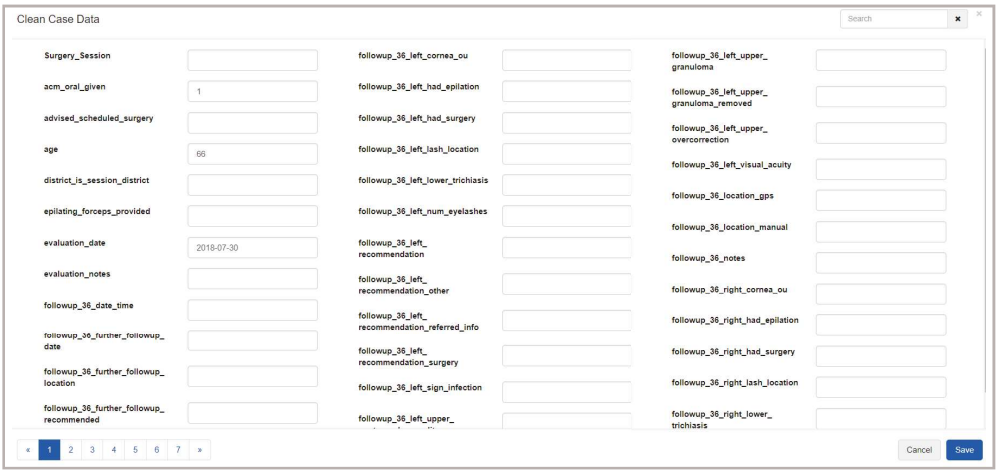


Related cases

It is possible to see the Session where patient was registered and all other patient records in the same Session using Related Cases.

To edit patient information

4. Scroll to the bottom of patient record and select Clean Case Data
   - » All variables that appear in the TT Tracker will appear on various screens. Many variables will be empty, depending on the responses provided for the patient.
5. Locate the variable requiring editing and make the change.



If changes made are related to skip logic (i.e. if a question has multiple follow-up questions, ALL questions must be updated. Unlike when using phone or web app, it will not happen automatically).

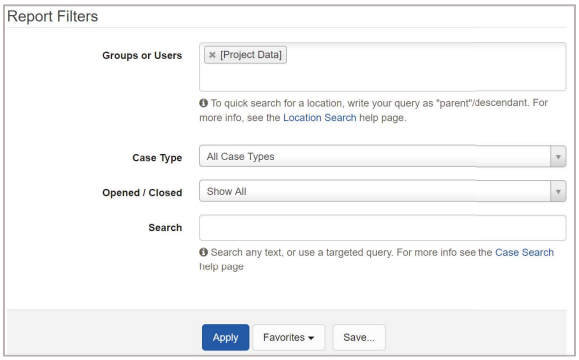
Tips and Tricks

It is REQUIRED to use the exact wording/format of each variable used in the TT Tracker. Use the variables list (or locate the wording from another patient record) to ensure the change will be correctly changed.

Removing Patient Form or Record from TT Tracker

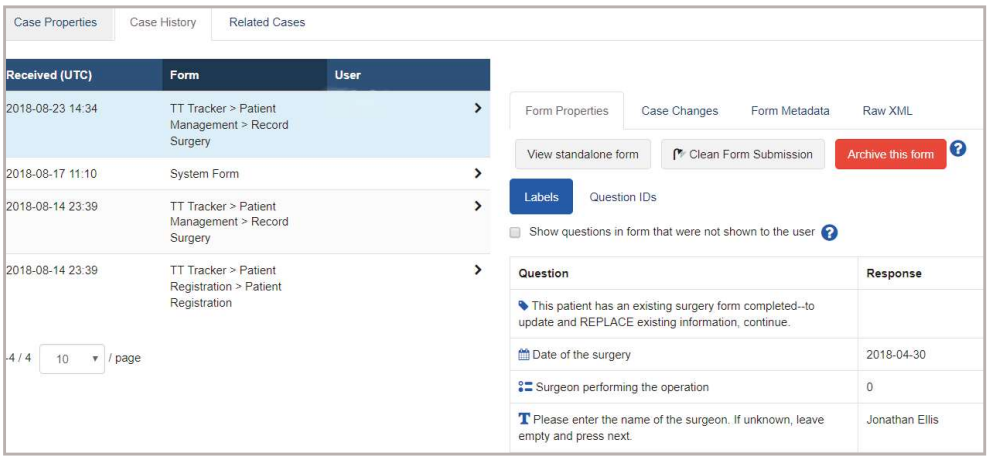
If a surgery record has been created for a patient who did not require or accept surgery, or a patient has been registered in error, the form must be removed from the TT Tracker so that it will not appear in the TT Tracker reports. The Administrator must archive the related forms that were entered in error, which will remove it from the patient's record and any reports related to surgery.

1. Select Case List from the Reports menu at the top of the page.
   - » **Group or Users**: Can leave as all Project Data or select a specific Mobile Worker or Location where patient was entered.
   - » **Case Type**: Select Patient.
   - » **Open/Closed**: Can leave as all types, or can select Open/Closed, depending on patient status.
   - » **Search**: Type patient name to be edited.



2. Once the filters have been added, select **Apply**.
   - » All patients that fit the filter criteria will appear in a list.
3. Select the **patient** to be edited.
4. Select **Case History**
5. Select the **form** for the activity to review
   - » The form submitted will appear for review.
6. Select **Archive this form**

> ***Remember:***
> *If a form or record contains errors and must be corrected, the form does not have to be deleted—use the phone/web app or Case List to make edits.*



Tips and Tricks

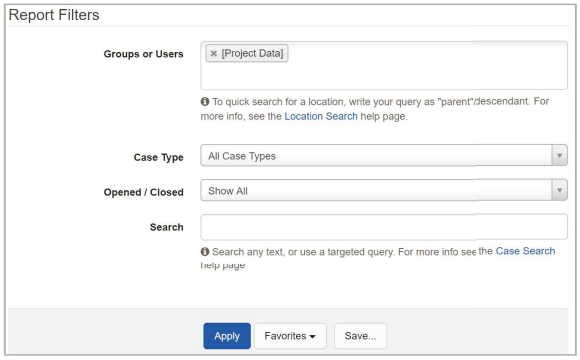
Forms must be archived in reverse order they were entered

* If multiple forms must be archived for a patient, the most recently submitted form must be archived first.
* If an entire patient record must be archived, all forms must be archived for the patient. Once the registration has been archived, the entire patient record will have been removed from the TT Tracker platform.

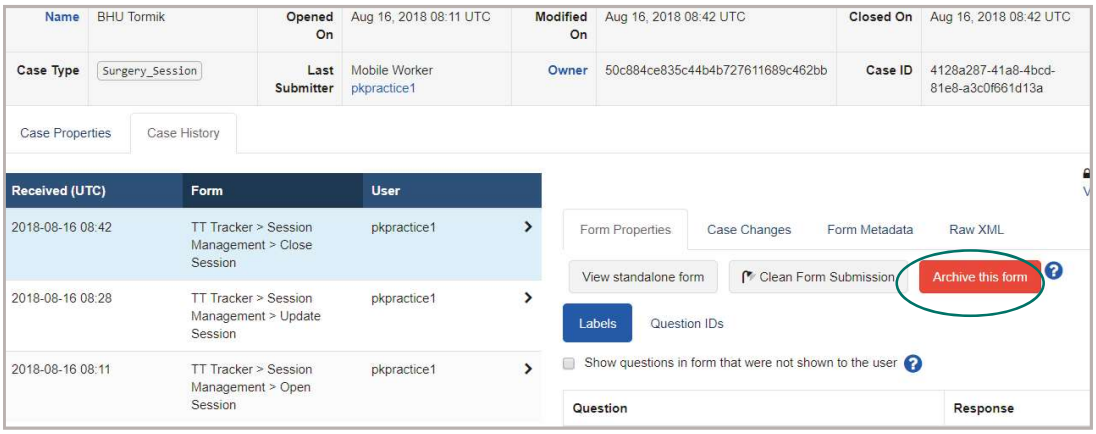
Re-opening Session on TT Tracker

When a form is archived, it will longer appear on the phone; the act of archiving the form essentially reverses the action completed by that form. If a Session is closed in error and must be re-opened to allow additional patients to be registered at a camp, Administrators will archive the Close Session. Archiving the Close Session form will remove it from the TT Tracker, reopening it for further use.

1. Select Case List from the Reports menu at the top of the page.
   - » **Group or Users**: Can leave as all Project Data or select a specific Mobile Worker or Location where patient was entered.
   - » **Case Type**: Select Session.
   - » **Open/Closed**: Depends on program needs.
     - → If a Session was closed in error and must be re-opened, select Only Closed.
   - » **Search**: Search for the Session that must be updated; Session IDs cannot be used as a valid search option.



2. Select **Apply**
   - » All Sessions that fit that criteria will appear in the list.
3. Select the **Session** record to be modified
4. Select **Case History**
5. Select **Archive this form**
   - » This will undo the Session Closure and re-open the Session.
   - » A message will appear to confirm form has been archived, re-opening Session.



Tips and Tricks

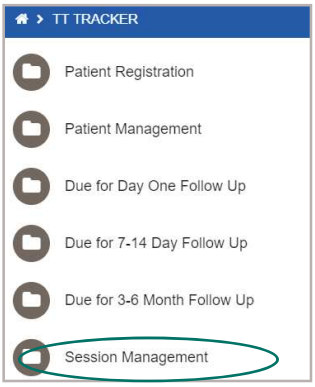
If a form Session was opened in error, it should NOT be archived; it may be linked to other forms. If a session has patients registered to that Session, it cannot be archived, it must be CLOSED due to duplication. See **Removing Duplicate Session on TT Tracker.**

Removing Duplicate Session on TT Tracker

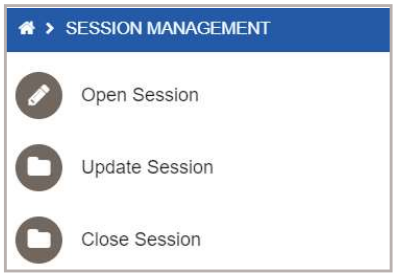
If a Session has been opened in error, it can be closed by Mobile Workers on the phone using the Close Session form within Session Management and select that the form was closed due to "erroneous/duplicate data".

Tips and Tricks

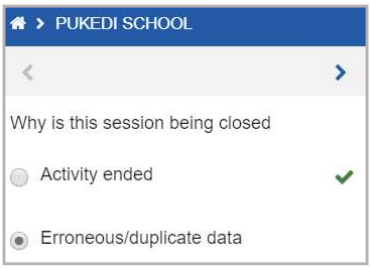
The Session should not have any patients registered to the Session—if patients have been registered to a Session that should be removed due to duplication, patients must first be reassigned to the correct Session before the duplicate Session is closed. See **Reassign Patients to Different Sessions**.

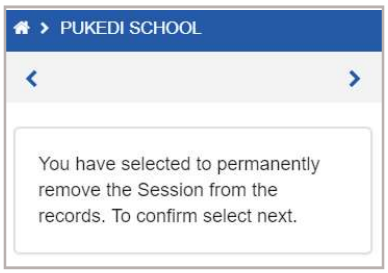


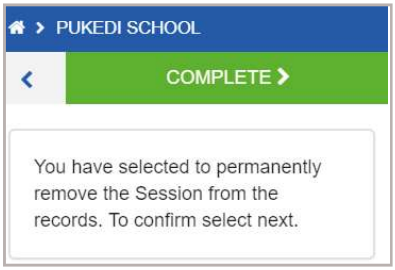
1. Access the TT Tracker on the phone or web app.
2. Select **Session Management**.
3. Select **Close Session**.
4. Select the **Session** that must be closed.
5. Review the information to ensure the correct Session will be closed.



6. Select **Erroneous/Duplicate Data** as reason for closing Session.
7. Select next (**blue arrow**)
8. Select **Complete**.







Reassign Patient to Different Session

If a patient has been assigned to the wrong session the proper sessions can be assigned on CommCareHQ. This may be due to registering patient to wrong session, or due to patient being registered to Temporary Session because the actual session was not listed.

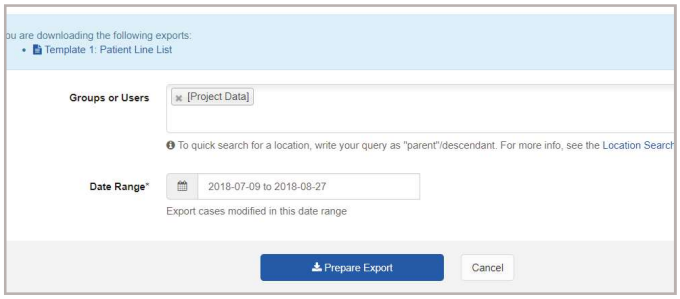
1. Open the Case Reassignment Excel template that will be used to upload changes to the records.
   - » The Excel file is can be found on **www.tttracker.org** under data and reports.

   > *The file should only have four column headings: case_id; parent_id; owner_id, and parent_type – those heading should NEVER be changed.*

2. Download Excel Templates from CommCare Exports
3. Select **Data** → **Export Case Data** from the menu at the top of the CommCare page.
4. Select the Templates needed for export.

   - » **Template A Patient Information to Reassign Patients:** This will help you find the unique CommCareID for each Patient that must be modified/reassigned to a different Session.
   - » **Template B Session Information to Reassign Patients:** This will help you find the correct unique CommCareID for the Session to where patient case should be reassigned.

5. Select Export
   - » If you are looking for information for a specific district, select the District(s) in Groups or Users.
   - » If you are looking for Sessions and Patients from a specific time period, you may include a date range.
   - » Leave blank if unsure.



6. Find Patients to Reassign
   - » Use **Template A** to locate the patients that need to be reassigned.
   - » Only caseid will be used from Template A. The remaining columns should be used to confirm correct patient record is selected.

	A	B	C	D	E	F	G	H	I	J	K
1	patient_id	caseid	name	age	sex	patient_district_name	patient_village_name	manual_session_entry	indices.Surgery_Session		
2	AACR4	4c15e65c-42d6-4b8e-a038-d59e91c725e2	Ariet Omod	67	female	Alpha One	Terkudi		ac8b1639-7832-4d94-b3e2-5		
3	AA008	19679a8c-4dd5-44fb-a35d-b11b252256 7e	Neba Guell	76	male	Alpha One	Mina	---	85d0651a-04c5-41bf-a172-3		
4	AACR8	fe6868d9-5f93-4679-8fd4-0d4c97b130 ba	Joy Bana	50	female	Alpha Two	Lurakilu	---	a666dae7-7ed0-4e1f-8316-d		
5	AA002	4e59b6b8-2a81-4fc7-a3f9-e88a68 813fbe	Gabriel Mata	77	male	Beta One	Terkudi	---	b8d76135-bf42-480e-8723-b		

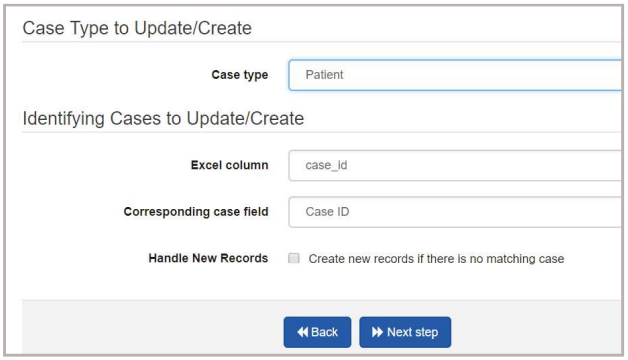
7. Add caseid(s) for patient(s) to be reassigned to Case Reassignment Template under **case_id** column.
8. Find Session to where patient will be REASSIGNED.
   - » Use **Template B** to locate the sessions where patients will be reassigned.
   - » Do **NOT** locate the information for the Session where the patient is currently registered; it is only necessary to locate the TARGET session for reassignment.
   - » Only caseid and ownerid will be used from Template B. The remaining columns should be used to confirm the correct target session is selected.

	A	B	C	D	E	F	G
1	session_id	site_name	caseid	owner_id	district_name	start_date	end_date
2	AA-CR-2	Pukedi School	a666dae7-7ed0-4e1f-8316-d507a37781bc	50c884ce835c44b4b727611689c462bb	Alpha One	2018-07-27	2017-10-24
3	AA-00-2	Mina Health Post	b2292c98-6acf-47b3-aff4-ada6a5340c82	50c884ce835c44b4b727611689c462bb	Alpha One	2018-04-01	---
4	AA-CE-5	Temporary Session	f099eafc-29f3-4125-a7c9-6736b9ce775d	0b9f794de06f4fc29db542dea55cea58	Temporary District	2018-07-01	---

9. Add **caseid**(s) for session(s) where patient(s) need to be reassigned to **Case Reassignment Template** under **parent_id**.
   - » This will reassign the patient FROM the session where they were registered TO the new session.
10. Add owner_id for session(s) where patient(s) need to be reassigned to Case Reassignment Template under **owner_id**.
    - » This will reassign the patient FROM the district where they were registered TO the new district.
    - » It is possible that the old **owner_id** and the new **owner_id** are the same (if the old Session was in the same district as the new session).

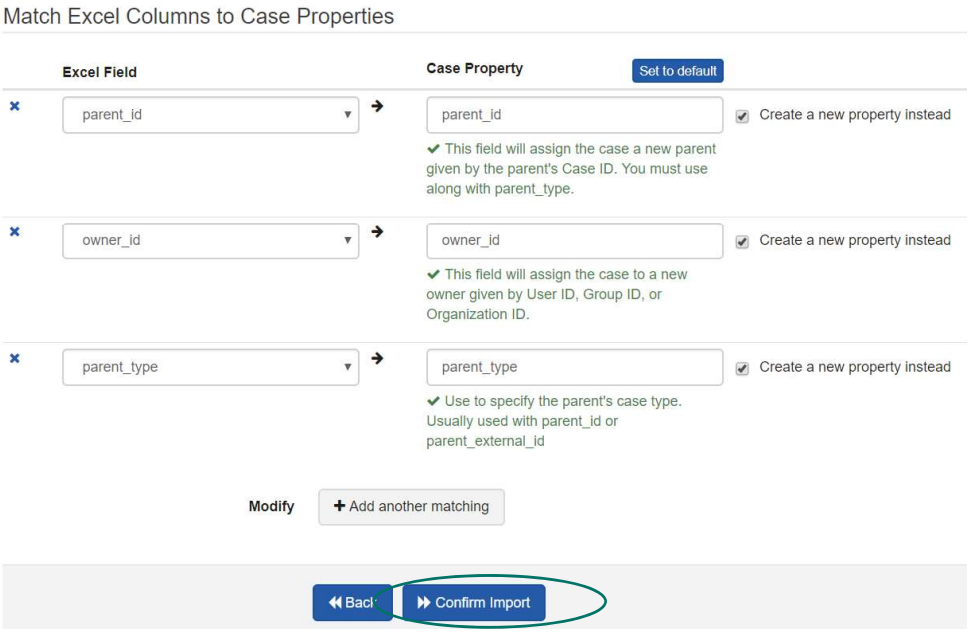
	A	B	C	D
1	case_id	parent_id	owner_id	parent_type
2	7878a898-b9ee-4608-87cc-eb943f473792	7a15b65d-f011-4f47-a22c-a6f28cc9991f	505fds78-3der-asg4-a34c-a8f43hg9842h	Surgery_Session
3				

11. Save updated Case Reassignment Template
12. Upload updated Case Reassignment Template
    - » Select **Data** → **View All**
    - » Select **Import Cases from Excel** under **Edit Data**
    - » Select **Choose File** and locate the updated Case Reassignment Template to import.
    - » Select **Next**.
      - → **Case Type: Patient**
      - → **Excel Columns: case_id**. This will use the patient caseid to locate the record to change.
      - → **Corresponding case field: Case ID**.
      - → **Handle New Records**: Do **NOT** tick box. You do not want to create new records if there is no matching case; there must be a matching case already in the system.



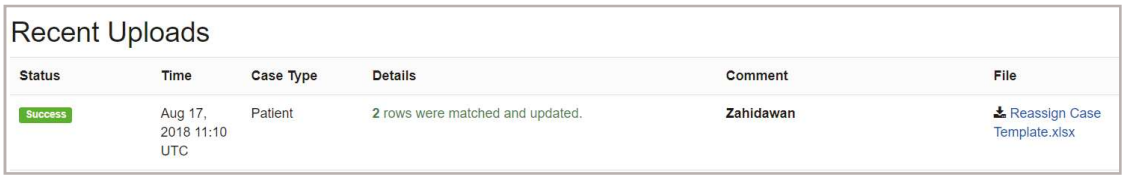
→ Select **Next Step**.

* CommCare will match the Excel columns with the information in the TT Tracker.
* If all information is correct, messages will be in green. Make sure all columns match as seen in the picture below.



→ Select **Confirm Import**.

→ Once uploaded, CommCare will confirm that the upload has been completed successfully.



Definitions

caseid (Template A (Patient Information))*: This is the unique identification number CommCare uses to identify an individual Patient in the application. It will be used to know which patient must be reassigned.*

caseid (Template B (Session Information))*: This is the unique identification number CommCare used to identify an individual Session in the application. It will be used to know which session is the target Session where patient will be reassigned.*

owner_id (Session Information)*: Is the unique identification number CommCare uses to identify an individual District in the application. This will be used to calculate District totals. This must be changed so that the new Session matches the new Session District.*

Reassign Temporary Session

When a patient is registered, he/she must be registered to an existing Session, or outreach activity site. It is not possible to registere a patient without first selecting where the activity is taking place. If the Session where the patient should be registered is not found on the phone, the Mobile Worker can register the patient to the Temporary Session and the Data Manager will reassign the patient to the correct session. The additional information required to reassign patients from Temporary Session can be found in two ways: Using the DQA (Data Quality Assurance) Dashboard on Metabase or using the information in Template A (Patient Information).

Metabase DQA Dashboard

1. Log in to Metabase
2. Select the DQA dashboard.
3. Locate the List of Patients in Temporary Session and click on the title.
4. Download the query
5. Use the **reassign patient to** column to locate the target session where patient should be reassigned.
6. Use the Session ID entered to locate the actual session on Template B (Session Information).
7. Follow the steps for Reassign Patient to Different Session.

CommCare Export: Template A

1. Log in to CommCare
2. Select **Data** → **Export Case Data**
3. Download **Template A: Patient Information to Reassign Patients**
4. Use the manual_session_entry on Template A (Patient Information) to locate the target session where the patient should be reassigned.

	A	B	C	D	E	F	G	H	I	J	K
1	patient_id	caseid	name	age	sex	patient_district_name	patient_village_name	manual_session_entry	indices.Surgery_Session		
2	AACR4	4c15e65c-42d6-4b8e-a038-d59e91c725e2	Ariet Omod	67	female	Alpha One	Terkudi	AA-EW-66	ac8b1639-7832-4d94-b3e2-59d9		
3	AA003	19679a8c-4dd5-44fb-a35d-b11b2522567e	Neba Guell	76	male	Alpha One	Mina	AA-TT-43	85d0651a-04c5-41bf-a172-376c5		
4	AACR8	fe6868d9-5f93-4679-8fd4-0d4c97b130ba	Joy Bana	50	female	Alpha Two	Lurakilu	AA-TT-43	a666dae7-7ed0-4e1f-8316-d507		
5	AA002	4e59b6b8-2a81-4fc7-a3f9-e88a68813fbe	Gabriel Mata	77	male	Beta One	Terkudi	AA-RE-7	b8d76135-bf42-480e-8723-b22a		

5. Use the Session ID entered to locate the actual session on **Template B (Session Information)**.
6. Follow the steps for Reassign Patient to Different Session.