



CataTrack

Administrator Manual

Version 1

CataTrack Administrator Manual

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CataTrack Set-Up

To ensure that the application is ready before any field work begins, administrators must:

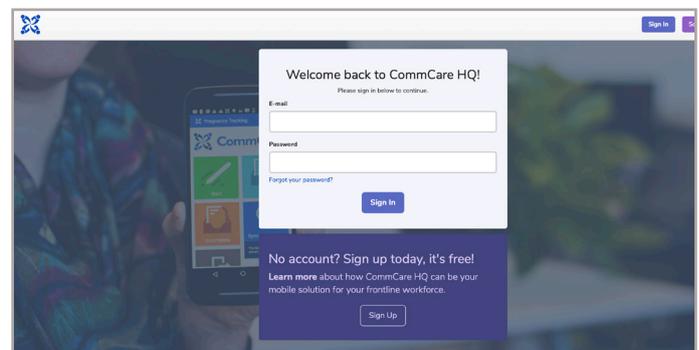
- » Create coverage area locations
- » Create or update Mobile Workers
- » Assign coverage area locations to Mobile Workers
- » Create or update surgeon list
- » Download the CataTrack application on all phones

Project Modifications

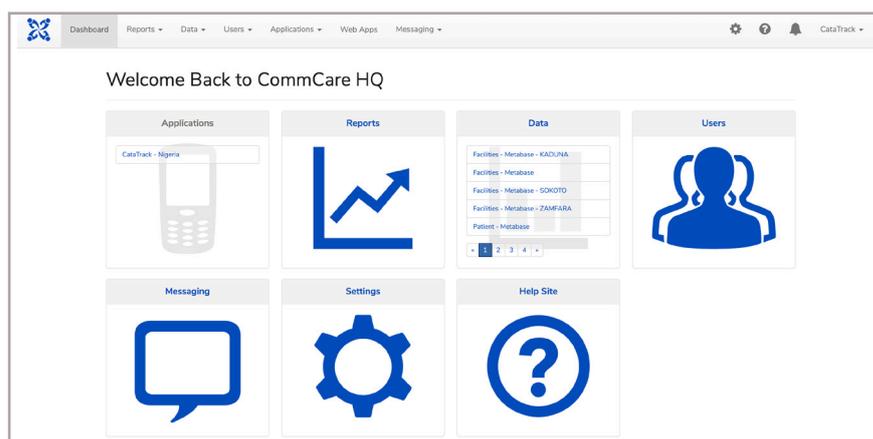
Access Country Project

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.
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.



Note that your account will be created by the 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 portal.



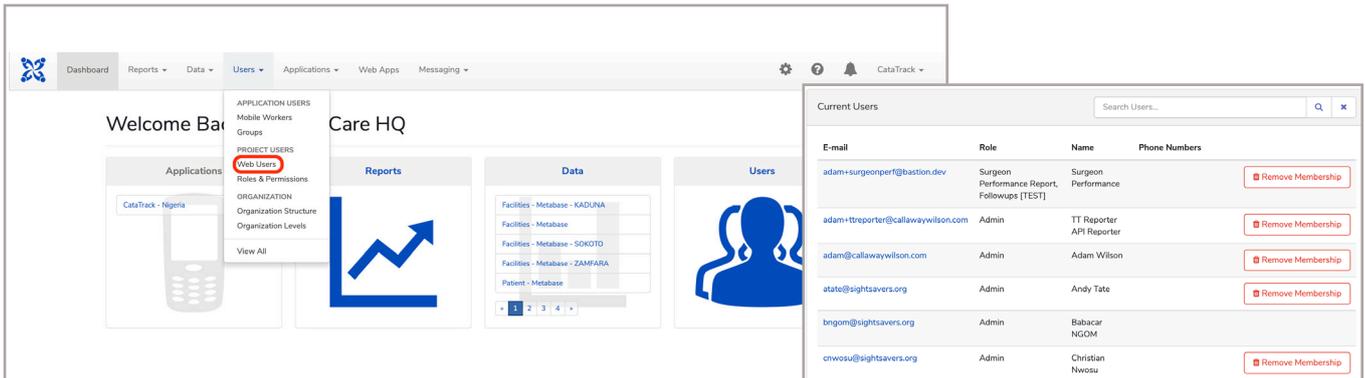
- » **Reports:** Used to access CommCare Report Builder and Case Lists for individual patients or facilities.
- » **Data:** Used to access CommCare Export Tool, manage surgeon tables, and reassign patients to a different facility.
- » **Users:** Used to create or update Mobile Workers and Web Users and create or update program locations.
- » **Web Apps:** Used to access the online version of CataTrack 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 assistants) entering information on the phones will not require a Web User login, and Web Users cannot enter information onto CataTrack mobile app unless a Mobile Worker username is used.

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



2. Existing users will appear in a list. Select **Invite Web User**.
3. Enter the Web User's email and assign the project role.

Information for new Web User

Email Address*

Project Role*

[Send Invite](#)

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.

Roles	Web Users	Mobile Workers	Groups	Locations	Data	Apps	Reports	Subscription Info	Actions
Admin	✓	✓	✓	✓	✓	✓	✓	✓	
App Editor						✓	✓		Edit Role Delete Role
Billing Admin								✓	Edit Role Delete Role
Field Implementer		✓	✓	✓			✓		Edit Role Delete Role
Read Only							✓		Edit Role

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.

Pending Invitations				Actions
E-mail	Role	Date (UTC)		
admin@maller.org	Admin	June 5, 2020, 12:19 p.m.	Email remaining	Resend Invitation Delete Invitation
supervisor@maller.org	Admin	June 5, 2020, 12:19 p.m.	Email remaining	Resend Invitation Delete Invitation

Need to Know: Automated reports recipients

For individuals who must receive the surgeon performance emails reports and/or the patients due-for follow-up lists, 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 **Surgeon Perf and Followup** in the role name.
- ◇ **Example: Program Managers: Include Surgeon Perf Reports**

Program Managers: Include Surgeon Perf	 View Only	 View Only			Edit Role		
Program Officer: Include Followup		 View Only	 View Only			Edit Role	
Read Only						Edit Role Delete Role	
Catatrack Platform/Data Manager	 View Only						Edit Role

Create Program Locations (Coverage Areas)

CataTrack 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 (State)* and *District (LGA)*; if differing levels are preferred, please inform the Development Team.

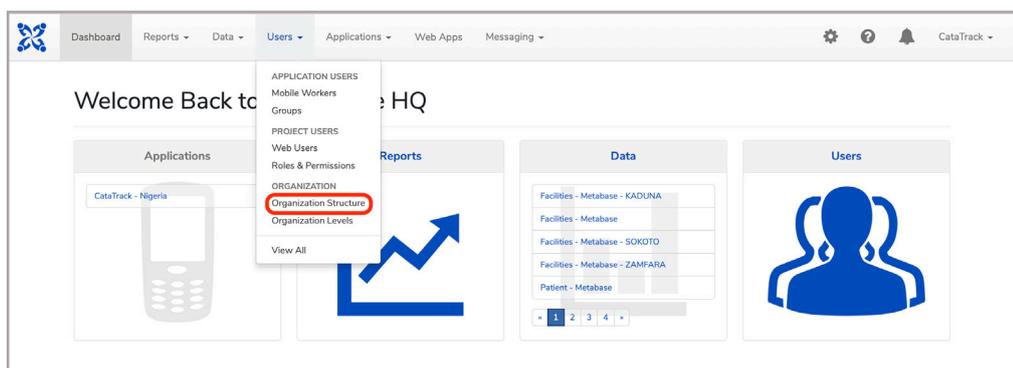
Locations and coverage areas should be added at the onset of a program's activities, though additional areas can be added at a later date. At the onset of a program, the Development Team will support this, though subsequent additions and changes can easily be completed by Administrators.

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

[+ New location at top level](#)

Kaduna (REGION)	Edit	Archive	Delete
Other (REGION)	Edit	Archive	Delete
Sokoto (REGION)	Edit	Archive	Delete
Zamfara (REGION)	Edit	Archive	Delete

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

Location Information

Name*

[Create Location](#)

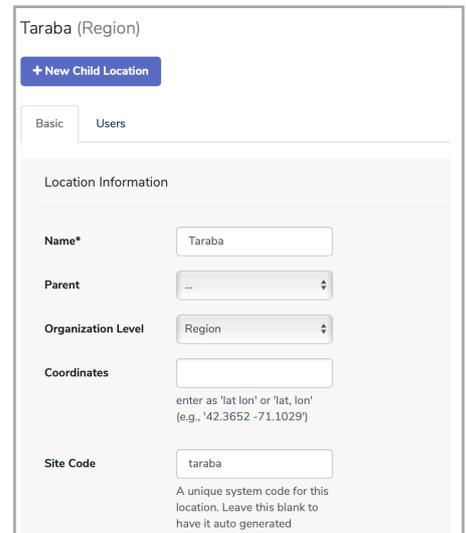
Pay close attention to the spelling; this must be recognized by all Mobile Workers and will be used for all reports.

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**. CommCare will automatically enter this information; Do NOT it.

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 CataTrack. 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.

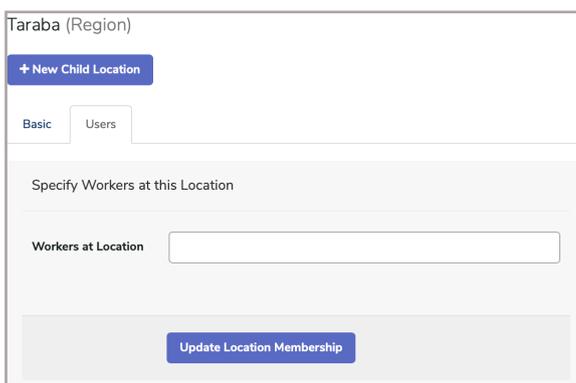
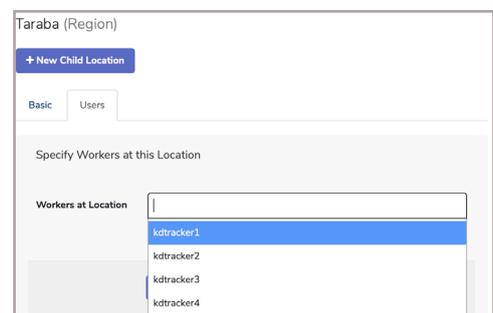


Adding Mobile Workers to Region

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

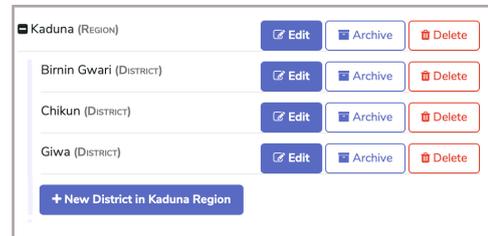
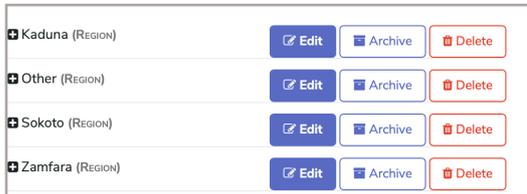
Click on the empty space next to **Workers at Location** and the list of Mobile Workers will appear to assist with selection.

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

Adding Districts to Regions

If you need to add District (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**.

Location Information

Name*

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.

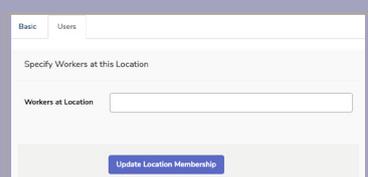
*The Region to which you are assigning the District should automatically appear in **Parent**. If it does not appear, select the Region where the District should belong.*

- » **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 assigned 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 CataTrack project **BEFORE** they can be added to a District or Region.*

- Select **Update Location Membership**

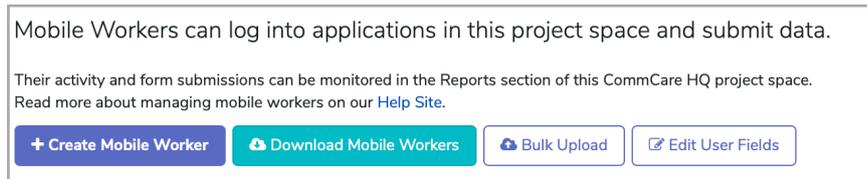
Creating and Editing Mobile Workers

You must create new Mobile Workers at the onset of implementation and as needed throughout the use of CataTrack. 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 the blue **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.

Create New Mobile Worker ✕

Basic Information

Username*

First Name

Last Name

Location

Password*

Additional Information

User ID*

Facility Management*

- **Username:** If usernames are applied to phones rather than individuals, use the same format for each phone so it can be easily distinguished (e.g. [country letters]tracker[#]). **Required**
- **First & Last Name:** Not required if applying username to phones. Should be included if assigned to an individual. **Optional**
- **Location:** Can be left blank--the locations can be added once the Mobile Worker is created. **Optional**
- **Password:** Must be provided. If usernames are for phones, create a password that is easily recognizable for all Mobile Workers across phones. **Required**
- **User ID:** Create a two digit alphanumeric ID for each Mobile Worker--all user IDs must be different. **Required**
- **Facility Management:** Allows user to be able to view and/or modify the facility's information. By default, set it to No. **Required**

4. Enter the Unique User ID for the phone/user
 - » **The Unique User ID is utilized in the creation of Patient IDs as well as Facility IDs.**
 - » Each phone/user must have a unique ID. *The IDs should be two characters in length (A number following by a letter) and should be unique to each username.*

Tips and Tricks

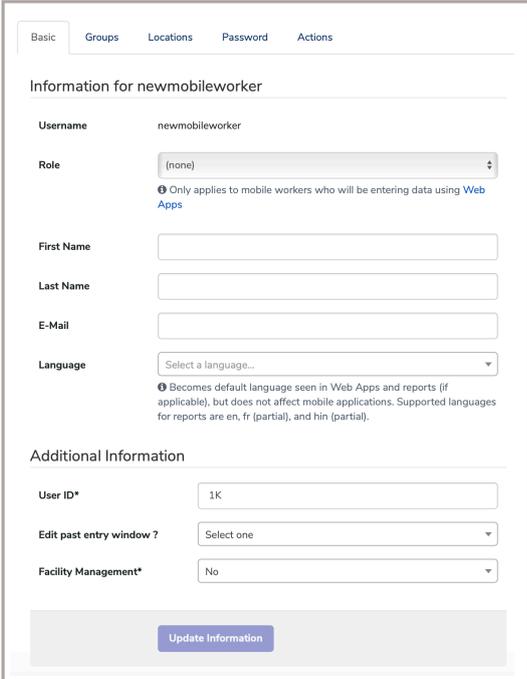
Use the suggested username tracking tool provided by the CataTrack Development Team to keep track of all Mobile Workers and their unique user IDs.

5. Facility Management: Select **Yes** if you want the Mobile Worker to manage (create, update or close) facilities that are located within his/her assigned coverage area(s). **By default, set it to No.** Not all users should have access to this menu.
6. Once created, 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.

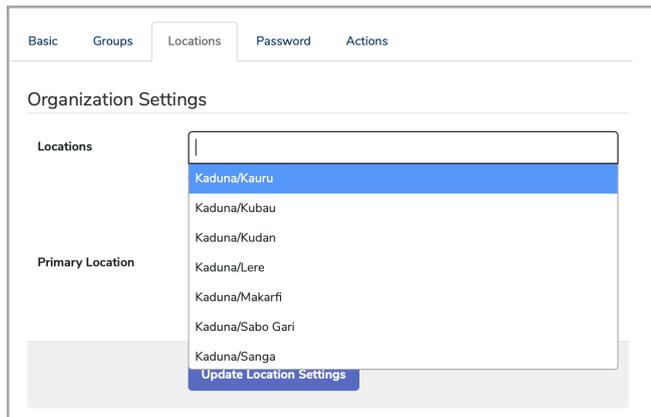
New Mobile Workers			
Username	First Name	Last Name	Status
 newmobileworker			✓ NEW

7. 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 CataTrack to enter patient information; a role is not required to use either interface.
- » **Email:** This can remain blank; no reporting offered by using CataTrack will be sent to Mobile Workers. Individuals who must receive designated reports and/or access 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.
- » **Edit past entry window:** Allows the user to be able to view and modify the forms after the initial scheduled date. Used for **historical data entry.**
- » **Facility Management:** Create, update and close a health facility. If it's set to Yes, the Mobile Worker will be able to see the menu on CataTrack mobile app.



7. The **Locations** tab allows you to assign the coverage area (designated Region or District where the health facility is located) 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 CataTrack.

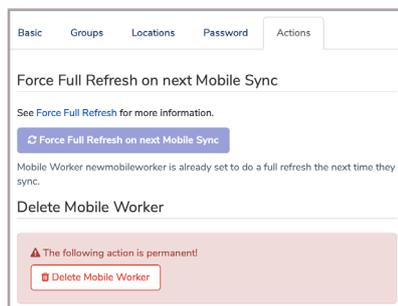


Individual districts or entire regions can be added to a Mobile Worker. It is not necessary to add all of the districts individually if Mobile Worker is working in all health facilities located within the entire region--just select the region.

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.



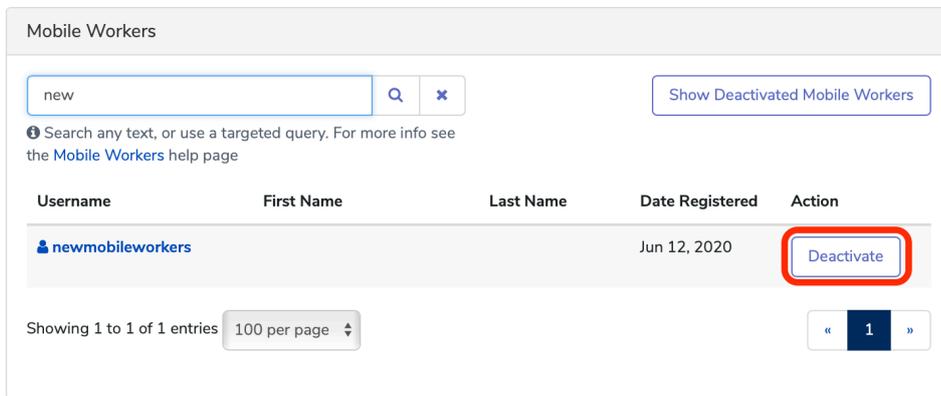
A Mobile Worker should NOT be deleted. Deleting the username will delete all records that were entered by that Mobile Worker. If usernames are no longer needed, the individual can be deactivated or archived but should NOT be deleted.

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**.



Mobile Workers

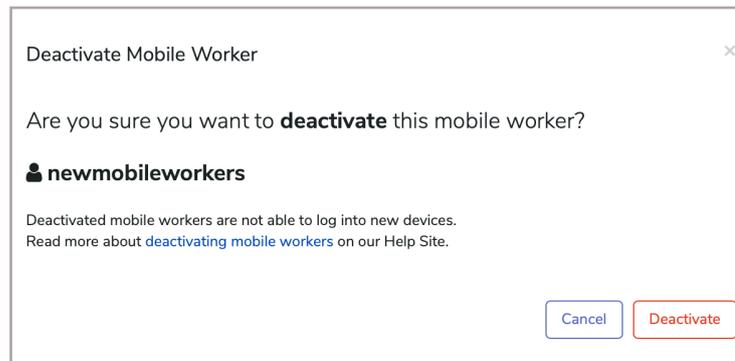
new

Search any text, or use a targeted query. For more info see the [Mobile Workers help page](#)

Username	First Name	Last Name	Date Registered	Action
newmobileworkers			Jun 12, 2020	<input type="button" value="Deactivate"/>

Showing 1 to 1 of 1 entries

3. Confirm the deactivation.



Deactivate Mobile Worker

Are you sure you want to **deactivate** this mobile worker?

newmobileworkers

Deactivated mobile workers are not able to log into new devices.
Read more about [deactivating mobile workers](#) on our Help Site.

Creating and Editing Surgeon Tables

CataTrack utilizes a lookup table to document the surgeon conducting surgery 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**.*

EXPORT DATA

- Export Form Data**
- Export Case Data
- Export SMS Messages
- Find Data by ID
- Daily Saved Exports
- Excel Dashboard Integration
- PowerBi/Tableau Integration

EDIT DATA

- Reassign Cases
- Import Cases from Excel
- Manage Forms
- Automatically Close Cases

LOOKUP TABLES

- Manage Tables**
- View Tables

Data ▾ Users ▾ App ▾

- Export Form Data
- Export Case Data
- Export SMS Messages
- PowerBi/Tableau Integration
- View All**

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

Download Lookup Tables

Table ID	View Table ↗	Edit or Delete Table	Include in Download all none
configuration	View Table	Edit Delete	<input type="checkbox"/>
surgeons	View Table	Edit Delete	<input checked="" type="checkbox"/>

+ Add Table

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

Downloading Lookup Tables

✓ Your export is ready.

Download File Now

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

UID	Delete(Y/N)	field: surgeon_id	field: surgeon_name	field: site_code	field: sort_value	field: email	field: surgeon_inactive
8d0bd38f720d46d185b5e0f8b2d18b44	N	1	Unknown		zzz2		0
16456c337df44b9cbd70e49ae2f13e83	N	0	Not Listed		zzz1		0
2c99c6da4042409d8335925f2ef5bd65	N	4	Carol Burnett	Alpha	Burnett, Carol	cburnett@myemail.org	1
0e91a785f718a4443a76cae2dc6c7eab	N	5	Chris Chross	alpha	Chross, Chris	chross@gmail.com	1
46ba79c5fe734edd9ad7322618b23bd	N	6	Dennis Duffy	Alpha	Duffy, Dennis	dduffy@outlook.com	1
6c0e81c228904a598bf5a3660009ab2	N	7	Floyd DeBarbour	Alpha	DeBarbour, Floyd	psdfs@email.fr	1
9a745e06cecf4edcadd3fc2a3d4e7e6	N	8	Dr Drew Baird	Beta	Baird, Drew	bairdtheking@yahoo.fr	1
9e70f0137d346948663ac0756c38d3	N	9	Wesley Snipes	Beta	Snipes, Wesley		1
0c8839427de6438aae8a62acc014a2c4	N	10	Dr Yeugh	Beta	Yeugh		1
6ba208b95d1f4a3db704c10ad2482370	N	11	Ariet Omod		Omod, Ariet		0
6f568c7918184865aa14733d45039d5d	N	12	Gabriel Mata		Mata, Gabriel		0

- » **UID:** This is the unique ID provided to each surgeon by CataTrack. 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**. 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. When adding a new surgeon to the table, provide a sequential number based on the last identifier given.
- » **Field: surgeon_name:** Enter the surgeon's name how it will appear in the list.
- » **Field: site_code:** Leave blank/untouched.
- » **Field: sort_value:** Use it to sort the list by name. Should be separated by a comma (,).
- » **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 **1**. 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 set **Field:surgeon_inactive** to **1** 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.

Upload Lookup Tables

Create new tables or update existing ones by uploading a new or existing Excel file. See the [Lookup Tables help page](#) for instructions on setting up your Excel file.

Lookup Tables File aucun fichier sél.

Existing Tables Replace existing tables

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 CataTrack. 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.

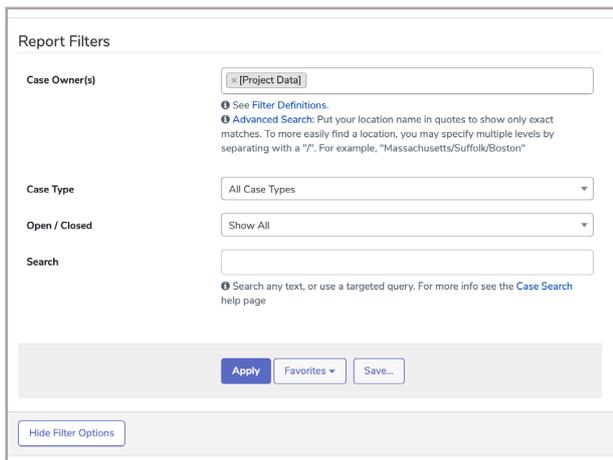
CommCare

All identifiable 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.



Case owner(s): Defaults to all data collected within CataTrack (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 (Facilities) 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.

Case type: **Surgery_sessions = Facilities

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.

Name	DAUDA MUSA	Opened On	Feb 19, 2020 12:36 UTC	Modified On	May 15, 2020 00:32 UTC	Closed On	---
Case Type	Patient	Last Submitter	Mobile Worker babacar	Owner	d9d0fe5e10ae49679dfa13d49537095d	Case ID	84f469a6-7eaf-4367-abe6-5c3ba50abff5

Case Properties Case History Related Cases

- » **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	
age	10	cns abnormalities	0	contact phone number	2348033979364
enumerator name intraop	do	evaluation date	2020-02-19	evaluation notes	
language code	en	left axial length		left axial length intraop	
left corneal opacity scar		left eye diagnosis		left eye diagnosis other	
left eye suspected cataract	0	left iol power		left iol power intraop	
				cvs abnormalities	0
				informant	1
				left biometry intraop	
				left eye iop	21
				left k1	

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 CataTrack. This keeps track of changes that are made to a case and allows you to delete (archive) a form that has been incorrectly submitted.

Received (UTC)	Form	User
2020-05-15 00:32	Cata Track - Template > Patient Management > Intraoperative Information	babacar
2020-02-20 09:43	Cata Track - Template > Patient Management > Preoperative Information	practice1
2020-02-19 12:36	Cata Track - Template > Patient Registration > Patient Registration	practice1

Submitted by 65d5f0153feb4573bbcb993b3d7b2a85
View app

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
...	
Date of the evaluation	2020-02-19
Visual acuity	
Right eye visual acuity	6/60
Left eye visual acuity	6/6

Received (UTC)	Form	User
2020-05-15 00:32	Cata Track - Template > Patient Management > Intraoperative Information	babacar
2020-02-20 09:43	Cata Track - Template > Patient Management > Preoperative Information	practice1
2020-02-19 12:36	Cata Track - Template > Patient Registration > Patient Registration	practice1

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

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

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

Name	Status	Case Type	Owner	Date Opened
▼ Template Facility	Open	Surgery_Session	Alpha 1	Feb 17, 2020 16:13 UTC
Ansoumana Faty	Open	Patient	Alpha 1	Feb 17, 2020 16:15 UTC
Muhammad Abubakar	Open	Patient	Alpha 1	Feb 19, 2020 12:28 UTC
Christian Nwosu	Open	Patient	Alpha 1	Feb 19, 2020 12:30 UTC
Selben Penzin	Open	Patient	Alpha 1	Feb 19, 2020 12:30 UTC
barbara marok	Open	Patient	Alpha 1	Feb 19, 2020 12:30 UTC

**Case type: Surgery_sessions = Facilities

CommCare Line List Exports

Data collected via CataTrack 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 paediatric cataract interventions and follow-up. 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, Preoperative, Intraoperative, 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.

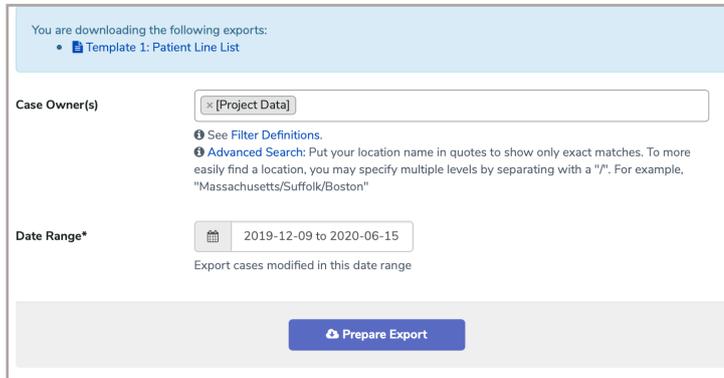
Download Existing Report

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 cataract surgeries: patient demographic and contact information; evaluation, diagnosis and treatment recommendations; surgery record; and outcome assessments for 24-hour, 1 week, 6 week, 3 month and 6 month follow-up. 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 for program needs.
See Creating Export from Existing Template.
 - » **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.
 - » **Templates A, B, and C:** Used by data managers for data cleaning.

Name	Case Type	Export	Edit	Delete
Template 1: Patient Line List  <small>This template contains all indicators related to paediatric cataract surgeries: patient demographic and contact information; evaluation, diagnosis and treatment recommendations; surgery record; and outcome assessments for 24-hour, 1 week, 6 week, 3 month and 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.***</small>	Patient	Export	Edit	X Delete
Template 2: Patient Visit Dates with Notes  <small>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 doctor or assistant***</small>	Patient	Export	Edit	X Delete
Template A: CaseIDs for Data Cleaning  <small>Export includes internal patient casids that appear on the DQA dashboard and the CataTrack Patient IDs so data manager may locate the correct record to correct.</small>	Patient	Export	Edit	X Delete
Template B: Edit Unknown Surgeon Name  <small>Data managers can use this export to view patient records that have entered "other surgeon" as the surgeon who operated patients. This information can be used to then add missing surgeons to the surgeon list and update patient records.</small>	Patient	Export	Edit	X Delete

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.



You are downloading the following exports:

- Template 1: Patient Line List

Case Owner(s) [Project Data]

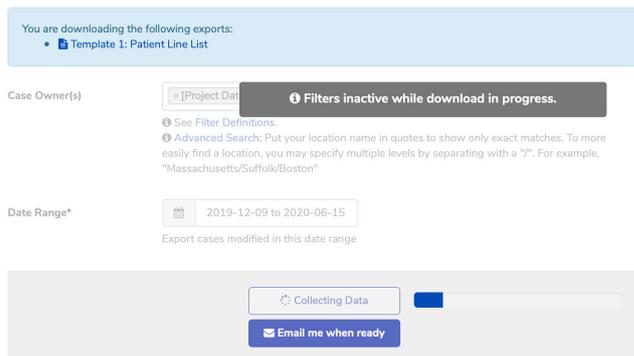
See Filter Definitions.
 Advanced Search: Put your location name in quotes to show only exact matches. To more easily find a location, you may specify multiple levels by separating with a "/". For example, "Massachusetts/Suffolk/Boston"

Date Range* 2019-12-09 to 2020-06-15
 Export cases modified in this date range

Prepare Export

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**.



You are downloading the following exports:

- Template 1: Patient Line List

Case Owner(s) [Project Data] Filters inactive while download in progress.

See Filter Definitions.
 Advanced Search: Put your location name in quotes to show only exact matches. To more easily find a location, you may specify multiple levels by separating with a "/". For example, "Massachusetts/Suffolk/Boston"

Date Range* 2019-12-09 to 2020-06-15
 Export cases modified in this date range

Collecting Data

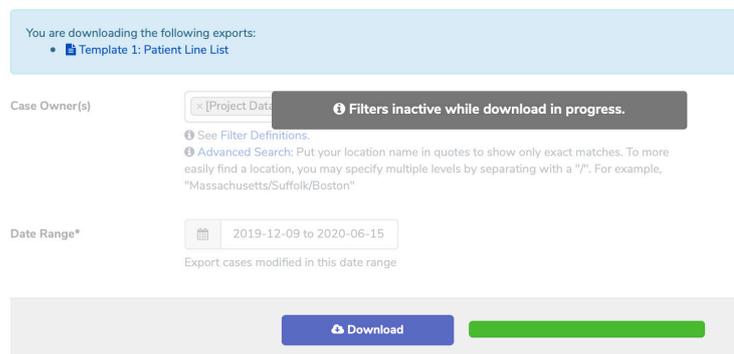
Email me when ready

Tips and Tricks

If the file preparation is delayed due to the size 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 in Excel, though CSV is optional).



You are downloading the following exports:

- Template 1: Patient Line List

Case Owner(s) [Project Data] Filters inactive while download in progress.

See Filter Definitions.
 Advanced Search: Put your location name in quotes to show only exact matches. To more easily find a location, you may specify multiple levels by separating with a "/". For example, "Massachusetts/Suffolk/Boston"

Date Range* 2019-12-09 to 2020-06-15
 Export cases modified in this date range

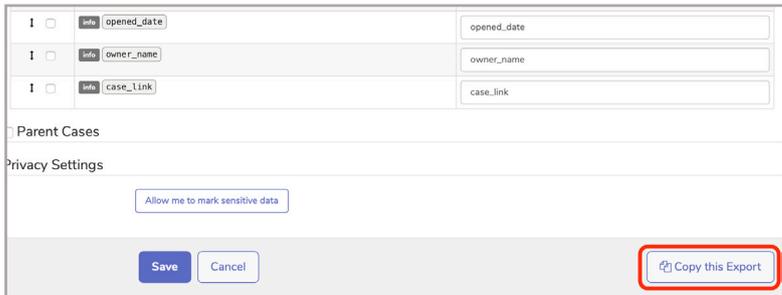
Download

*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

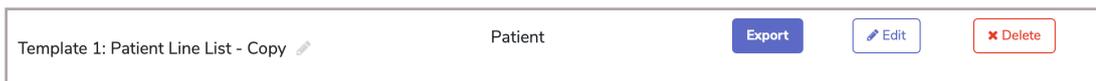
If you want to use a template as the basis for a new export, you will need to make a copy of the existing template.

1. Select **Export Case Data** from the Data menu at the top of the screen.
2. Select **Edit** for the saved export that you want to modify.
3. At the bottom right of the page, select **Copy this export**.

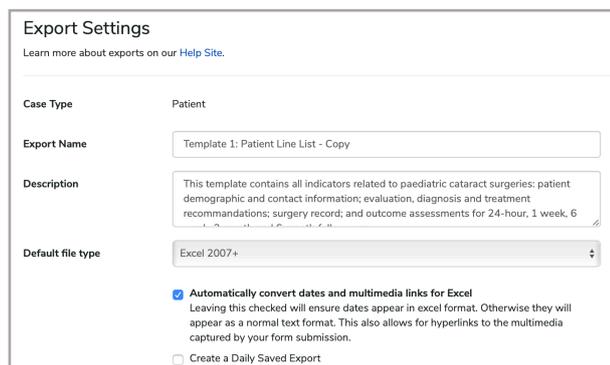


Do not make changes to the Template; there are users who may need the original Template.

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



4. To modify the copy, select **Edit**.
5. Modify the **Export Settings**.
 - » **Case Type:** Within the CataTrack system there are two case types: Session and Patient
 - *Surgery_Session Cases:* All facilities created within a coverage area.
 - *Patient Cases:* All patients within CataTrack.
 - » **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 CataTrack 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 tick Create a Daily Saved Export box.



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.

Include?		Property	Display
<input type="button" value="Select All"/> <input type="button" value="Select None"/>		<input type="button" value="Show Advanced Questions"/> <input type="button" value="Show Deleted Properties"/>	
↓	<input checked="" type="checkbox"/>	info caseid	caseid
↓	<input checked="" type="checkbox"/>	registration_date	Reg. Date
↓	<input checked="" type="checkbox"/>	patient_id	Patient ID
↓	<input checked="" type="checkbox"/>	name	Name

Include?		Property	
<input type="button" value="Select All"/> <input type="button" value="Select None"/>		<input type="button" value="Show Advanced Questions"/> <input type="button" value="Show Deleted Properties"/>	
↓	<input checked="" type="checkbox"/>	info caseid	
↓	<input checked="" type="checkbox"/>	registration_date	→ Included in export
↓	<input checked="" type="checkbox"/>	patient_id	
↓	<input checked="" type="checkbox"/>	name	
↓	<input type="checkbox"/>	age	
↓	<input type="checkbox"/>	age_months	
↓	<input type="checkbox"/>	sex	→ Not included in export
↓	<input type="checkbox"/>	patient_region_name	

» 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.

↓	<input checked="" type="checkbox"/>	info caseid
↓	<input checked="" type="checkbox"/>	registration_date
↓	<input checked="" type="checkbox"/>	patient_id
↓	<input checked="" type="checkbox"/>	name
↓	<input checked="" type="checkbox"/>	age

» 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.

↓	<input checked="" type="checkbox"/>	patient_id	Patient ID
↓	<input checked="" type="checkbox"/>	name	Name
↓	<input checked="" type="checkbox"/>	age	Age (years)
↓	<input checked="" type="checkbox"/>	age_months	Age (months)

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 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 Reports 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.

REPORTS

Facility List

Followup List

Patient Summary

Report Filters

Patient ID

Patient Name

Surgery Date

Surgeon

Facility ID

Facility Name

Facility State

Facility LGA

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 facility.

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 by selecting **Export to Excel**.

Patient ID	Reg. Date	Name	Age (years)	Age (months)	Sex	State	LGA	Address	Phone #	Phone Owner	Eval. Date	RE VA	LE VA	RE IOP	LE IOP
AA1A1		MUSA DAUDA agagu	10		male	Alpha	Alpha 1	1 Golf course road	2348033979364	family_member	2020-02-19			20	18
AA1A2		DAUDA MUSA	10		male	Alpha	Alpha 1	mando kaduna	2348033979364	village_leader	2020-02-19			20	21
AA1B1		Christian Nwosu	10		male	Alpha	Alpha 1	1 Golf Course Road	2347036170387	family_member	2020-02-19			20	18
AA1B2		Nwosu ONYEKACHI	6		female	Alpha	Alpha 1	1. Ungwan Dosa Street	2347036170387	family_member					
AA2A1		Musa Danjuma	10		male	Alpha	Alpha 1	1 golf course road.	2348033071981	family_member	2020-02-19				



Create New CommCare Report

1. Select **View All** from the Reports 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 CataTrack.
 - » **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 facilities.

Tips & Tricks

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

Step 1 of 2 - Select Data Source

Report

Report name* ?

Data

Forms or Cases* ? Case

Application* ? CataTrack - Nigeria

Case* ? Patient

Next

4. Select Next

Columns

	PROPERTY	LABEL	
↓	name	<input type="text" value="Name"/>	✖
↓	computed/owner_name	<input type="text" value="Owner"/>	✖
↓	age	<input type="text" value="age"/>	✖
↓	age_months	<input type="text" value="age months"/>	✖

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 ✖

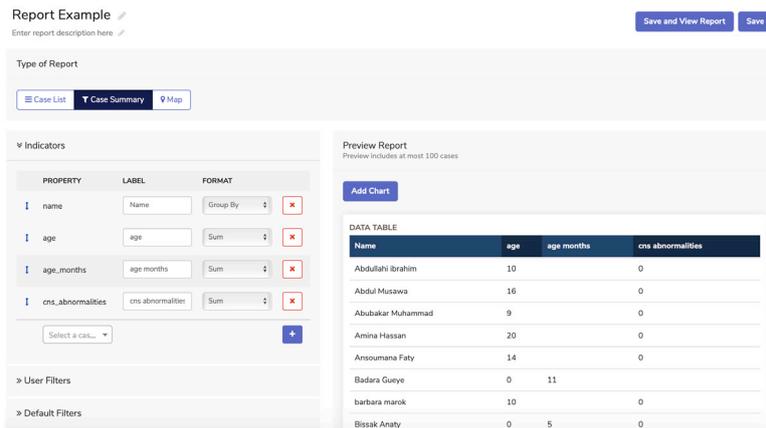
5. Add indicators to the report under Case List Columns.

- » 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.

+

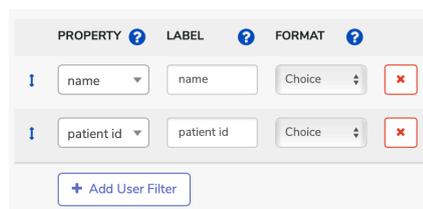
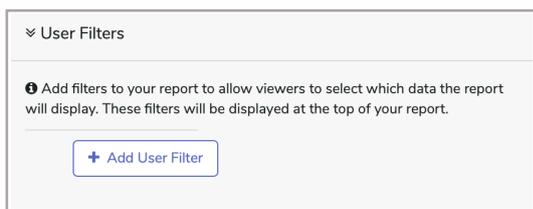
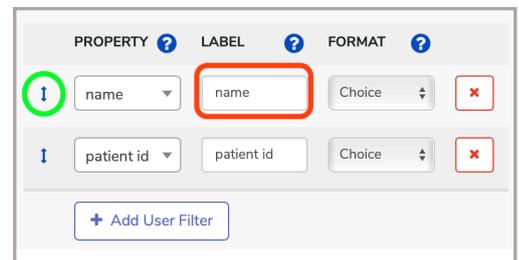
- age
- age months
- Case Closed
- cns abnormalities
- contact phone number
- cvs abnormalities
- day one ask left additional

Select a case property



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.

- » Once the indicator is selected, select to add it to the list of variables to appear in the report.
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.
 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 location).
 10. Add the filters of your choice.



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

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

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.

Note: Each country project is permitted to have FIVE saved reports within 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**.

Indicators

	PROPERTY	LABEL	FORMAT	
↓	patient_id	patient id	Group By	✘
↓	name	Name	Group By	✘
↓	age	age	Sum	✘
↓	sex	sex	Sum	✘
↓	patient_district_n...	patient district na	Sum	✘
↓	patient_region_na...	patient region na	Sum	✘

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

DATA TABLE			
patient id	Name	age	sex
AA1A1	MUSA DAUDA agagu	10	
AA1A2	DAUDA MUSA	10	
AA1B1	Christian Nwosu	10	
AA1B2	Nwosu ONYEKACHI	6	
AA2A1	Musa Danjuma	10	

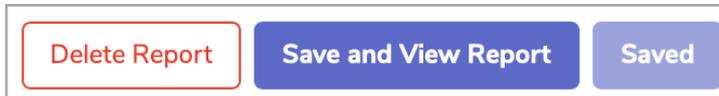
DATA TABLE			
patient id	Name	age	sex
AA1A1	MUSA DAUDA agagu	10	male
AA1A2	DAUDA MUSA	10	male
AA1B1	Christian Nwosu	10	male
AA1B2	Nwosu ONYEKACHI	6	female
AA2A1	Musa Danjuma	10	male

Editing/Deleting Existing CommCare Report

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



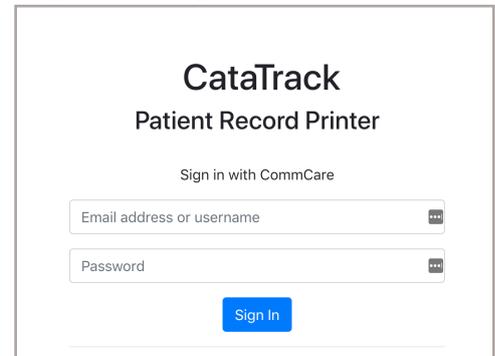
3. Select  **Edit Report**
4. Follow the same steps described in **Create New CommCare Report**.
5. To DELETE report, select **Delete Report**.



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.

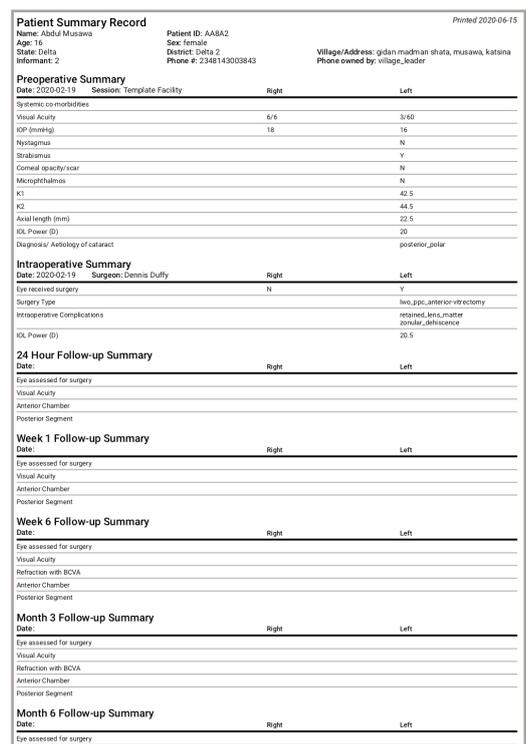
1. Access your program specific PDF Exporter portal.
 - » [https://pdf-record-printer-preview.herokuapp.com/\[projectId\]](https://pdf-record-printer-preview.herokuapp.com/[projectId])
2. Log in using your CommCare Web User password and username.
 - » Once logged in, all records to which you have access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



All patients within the location selected will appear in the list, along with the facility where they were evaluated, the diagnosis for each eye, and the date of surgery, if applicable.

Patient Record Printer									
Location		All Locations	Load patients						
Download selected		English	Patients 1 to 26 of 26		Select All				
District	Session	Outreach Location	Patient ID	Name	Sex	Eval	District	Eval	Print?
Alpha 1	Template Facility		AABN1	Ansoumana Faty	male	2020-02-17		-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA4A1	Selben Penzin	female			-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA1B2	Nwosu ONYEKACHI	female			-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA3A1	Amina Hassan	female	2020-02-20	2020-02-20	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA3A2	Hassan Amina	male	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA2A1	Musa Danjuma	male	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA8A2	Abdul Musawa	female	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA6A3	Naz Kabir	male	2020-02-20	2020-02-20	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA2A2	Danjuma Musa	male	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA9A1	Muhammad Abubakar	male	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA1B1	Christian Nwosu	male	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>
Alpha 1	Template Facility		AA8A1	Musawa Abdul	male	2020-02-19	2020-02-19	-/-	<input type="checkbox"/>

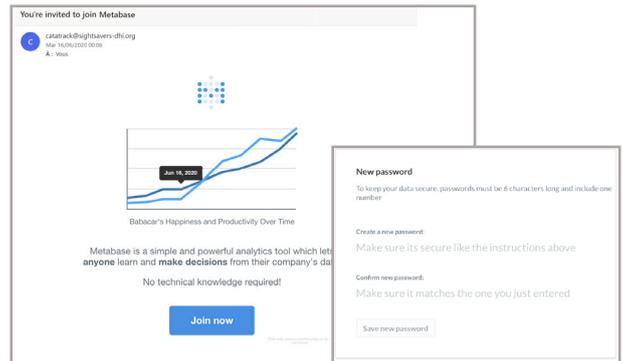
4. Tick the box for the records that you want to download, or tick the Select All box that will select all records in the selected location or the entire collection of records.
5. Once the desired records are selected, select **Download Selected**.
 - » All selected records will be downloaded into a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



Metabase

Metabase is the data visualization tool for CataTrack; remember that all data housed within Metabase is de-identified. Metabase can be accessed via <https://dashboard.catatrack.org>.

Designated users will receive an email invitation to the country-specific project on Metabase.

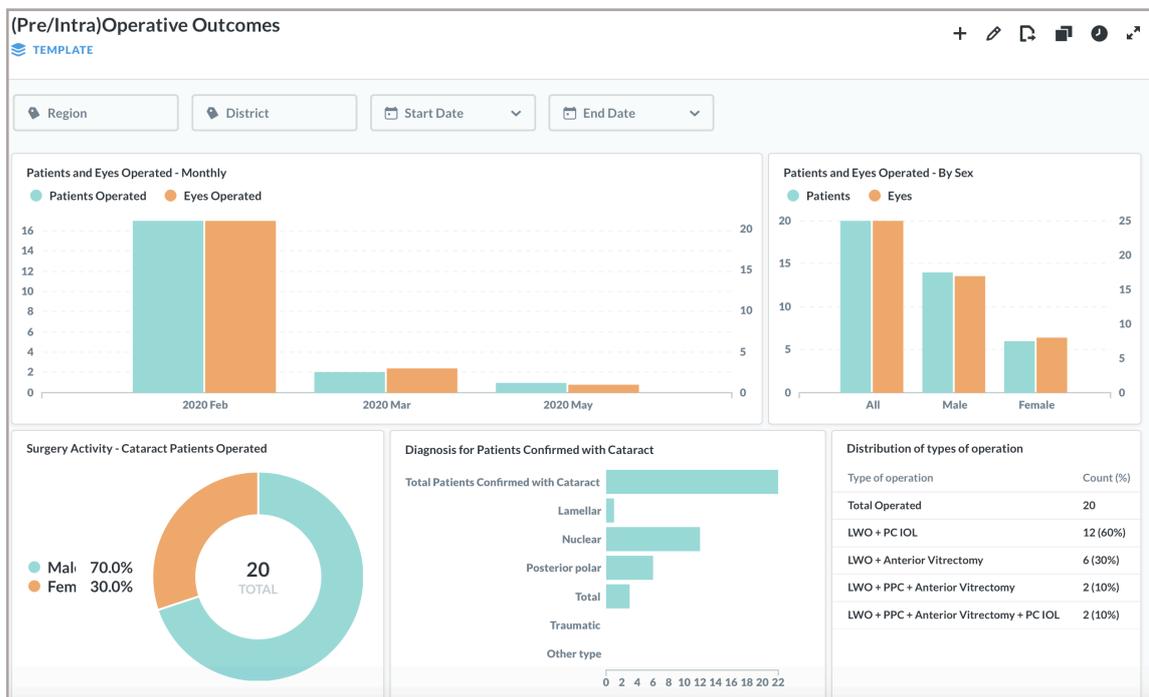
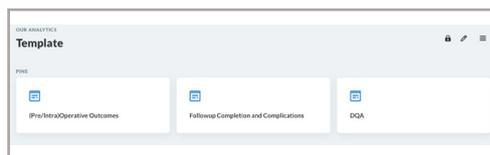


Metabase Dashboard

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.

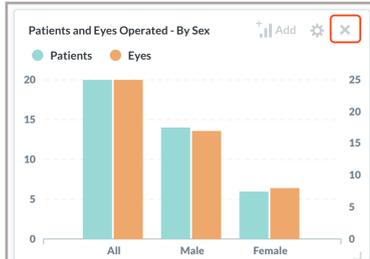
View Dashboard

1. Select the Dashboard you would like to review from the main menu.
 - » All existing dashboards for a project will appear in the list.
 - **(Pre/Intra)Operative Outcomes:** Includes overall summary information related to surgical output by facilities.
 - **Followup Completion and Complications:** Includes the rate of follow-ups and complications completed in each facility and by followup timepoint.
 - **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.

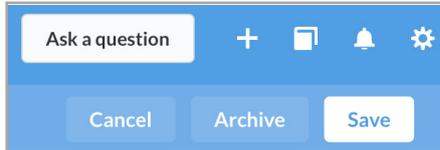


Edit Dashboard

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.



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. 
 - » Pick 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.



Pick a question to add

OUR ANALYTICS > TEMPLATE

- 1. Diagnosed without surgery
- 2. Consent given, surgery date filled but no surgery on either/both eyes.
- 3. Dates out of order
- 4. Patients - Manual ID Not Found
- 5. Patients with 'Other Surgeon'
- 6. List of patients in Temporary Facility
- 7. Patients with follow-up but no surgery
- 8. Patients operated but not followed up

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.

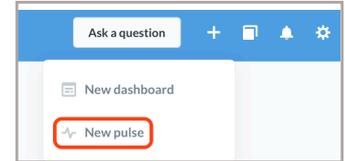
1. Select the Dashboard where the question for download is stored.
2. Click on the title of the query to download.
3. Select the arrow to show the dropdown menu.
4. Select .xlsx (or .csv or .json if desired).

Region	ID	Facility Name	Cataract Total	Cataract Male	Cataract Female	Surgery Total	Surgery Male	Surgery Female	Refusal Total
Alpha	AA-BN-1	Template Facility	22	16	6	20	14	6	2
Other	AA-BN-2	Temporary Facility	0	0	0	0	0	0	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 to 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.



New pulse

Name your pulse
Give your pulse a name to help others understand what it's about.

Which collection should this pulse live in?

Our analytics

Pick your data
Choose questions you'd like to send in this pulse.

1. Select a question

Pick your data

Choose questions you'd like to send in this pulse.

1. **Facility Activity Report**

Region	ID	Facility Name	Cataract Io
Alpha	AA-BN-1	Template Facility	
Other	AA-BN-2	Temporary Facility	

Showing 10 of 13 columns.

2. **Follow-up Completion Rates**

	24-hour	1 Week	6 Weeks
Follow-up needed	22	22	21
Follow-up completed	13	11	10
% completion	59%	50%	48%

3. Select a question

OUR ANALYTICS > TEMPLATE

1. Diagnosed without surgery

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**.

Where should this data go?

Email

To:

Enter email addresses you'd like this data to go to

Sent: Daily

at: 8:00 AM

Emails will be sent at 8:00 AM GMT, your Metabase timezone.

Send email now

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.

Skip if no results

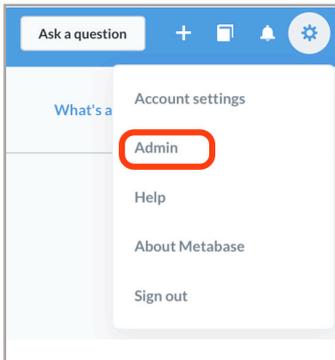
Skip a scheduled Pulse if none of its questions have any results.



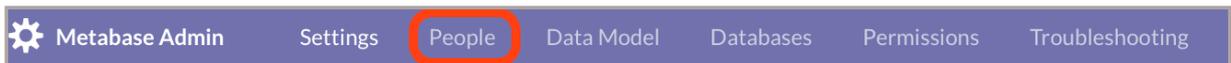
Add Users in Metabase

Though all data used in Metabase will be de-identified, access to facility 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**.



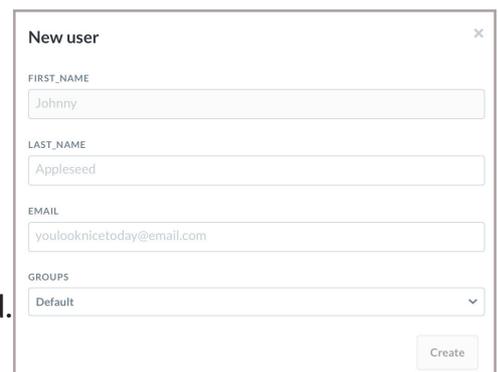
4. Select **People**.



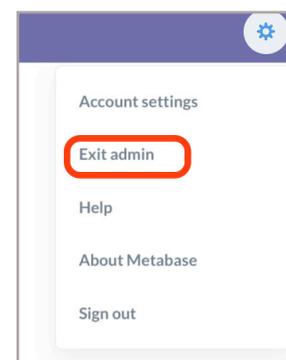
- » A list of existing users will appear in the list with the groups (projects) that they are given permission to view.

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 each facility as required.



7. Select **Create**.
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 CataTrack 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 CataTrack 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.

Report Filters

Case Owner(s)

See Filter Definitions.
Advanced Search: Put your location name in quotes to show only exact matches. To more easily find a location, you may specify multiple levels by separating with a "/". For example, "Massachusetts/Suffolk/Boston"

Case Type

Open / Closed

Search

Search any text, or use a targeted query. For more info see the [Case Search](#) help 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.

Opened/Closed: Can leave as all types, or can select Open/Closed, depending on patient status.

Search: Use the search to locate the name of the patient to be edited.

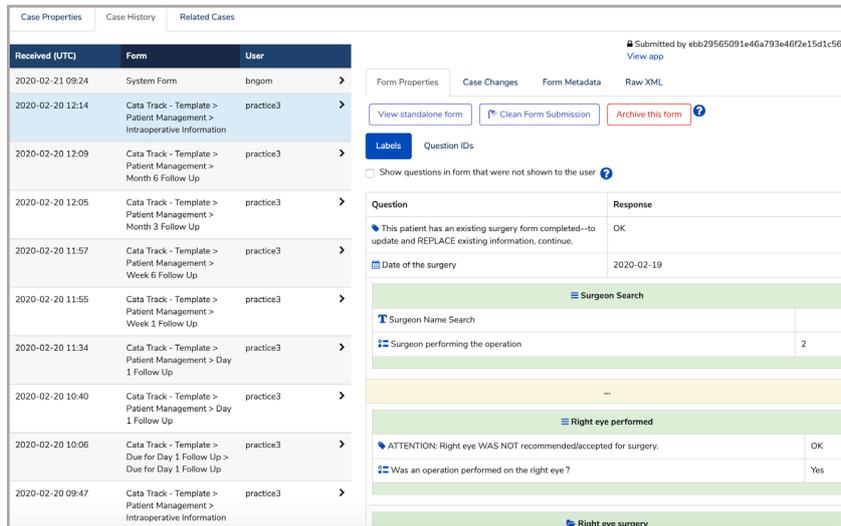
****Case type:** *Surgery_sessions = Facilities*

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 Type	Name	Owner	Created Date	Created By	Modified Date	Status
Patient	Hassan Amina	Alpha 1 [District]	2020-02-19 12:35:03	practice3@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Musa Danjuma	Alpha 1 [District]	2020-02-19 12:30:46	practice2@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Abdul Musawa	Alpha 1 [District]	2020-02-19 12:36:44	practice6@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Naz Kabir	Alpha 1 [District]	2020-02-20 09:56:19	practice6@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Danjuma Musa	Alpha 1 [District]	2020-02-19 12:36:31	practice2@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Muhammad Abubakar	Alpha 1 [District]	2020-02-19 12:28:56	practice9@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Christian Nwosu	Alpha 1 [District]	2020-02-19 12:30:42	practice10@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open
Patient	Badara Gueye	Alpha 1 [District]	2020-02-27 23:26:16	babacar@catatrack-template.commcarehq.org	2020-02-27 23:26:16	open
Patient	Bissak Anaty	Alpha 1 [District]	2020-03-12 17:26:09	babacar@catatrack-template.commcarehq.org	2020-03-12 17:52:41	open
Patient	Musawa Abdul	Alpha 1 [District]	2020-02-19 12:30:44	practice8@catatrack-template.commcarehq.org	2020-02-21 09:24:38	open

To review the information entered on each form

1. Select **Case History**.
2. 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**

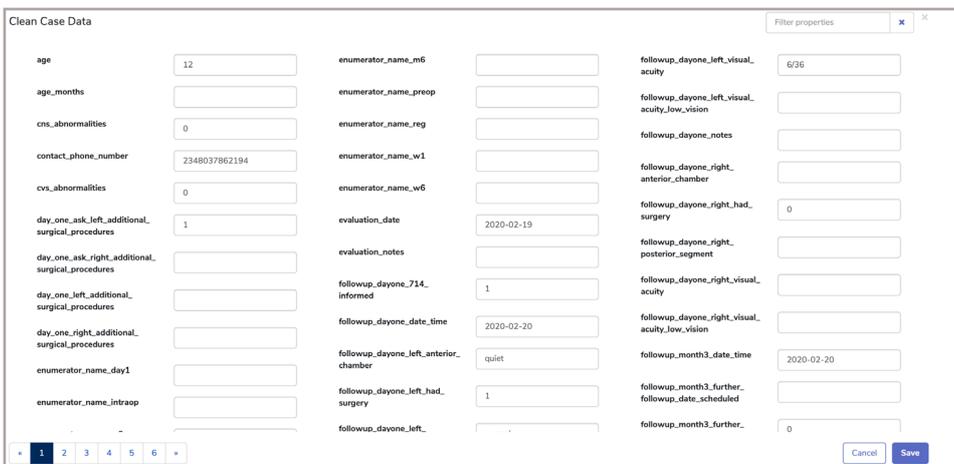


Related cases

It is possible to see the facility where a patient was registered and all other patient records in the same facility 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 CataTrack 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).

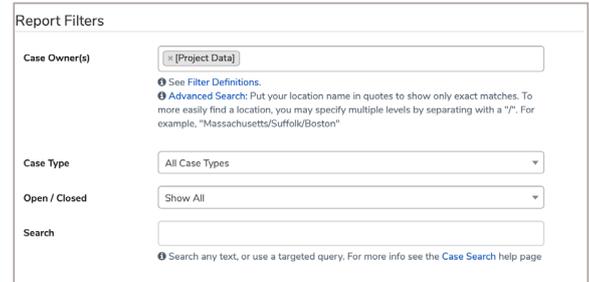
Tips and Tricks

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

Removing Patient Form or Record from CataTrack

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 CataTrack so that it will not appear in the 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**.



Report Filters

Case Owner(s)

See Filter Definitions.
Advanced Search: Put your location name in quotes to show only exact matches. To more easily find a location, you may specify multiple levels by separating with a "/". For example, "Massachusetts/Suffolk/Boston"

Case Type

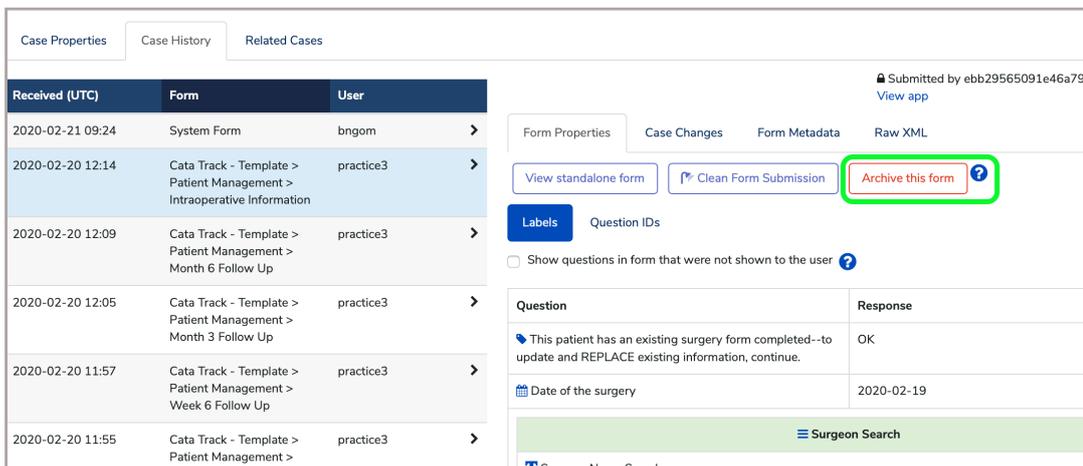
Open / Closed

Search

Search any text, or use a targeted query. For more info see the [Case Search](#) help page

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.



Received (UTC)	Form	User
2020-02-21 09:24	System Form	bngom
2020-02-20 12:14	Cata Track - Template > Patient Management > Intraoperative Information	practice3
2020-02-20 12:09	Cata Track - Template > Patient Management > Month 6 Follow Up	practice3
2020-02-20 12:05	Cata Track - Template > Patient Management > Month 3 Follow Up	practice3
2020-02-20 11:57	Cata Track - Template > Patient Management > Week 6 Follow Up	practice3
2020-02-20 11:55	Cata Track - Template > Patient Management >	practice3

Submitted by ebb29565091e46a79
[View app](#)

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	2020-02-19

Surgeon Search

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 CataTrack platform.

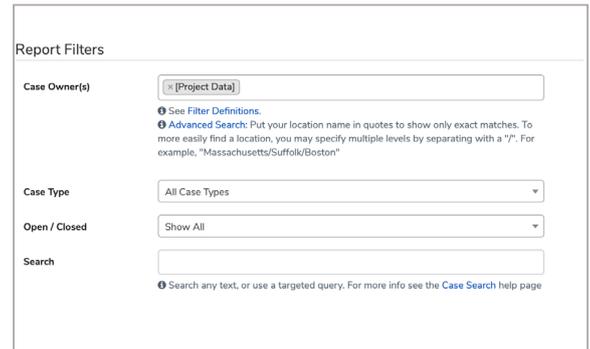
Re-opening Facility on CataTrack

When a form is archived, it will no longer appear on the phone; the act of archiving the form essentially reverses the action completed by that form.

If a facility is closed in error and must be re-opened to allow additional patients to be registered at the facility, administrators will archive the Close Facility form. Archiving the Close facility form will remove it from CataTrack, reopening the facility 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 Surgery_sessions.
- » **Open/Closed:** Depends on program needs.
 - If a facility was closed in error and must be re-opened, select Only Closed.
- » **Search:** Search for the facility that must be updated; Facility IDs cannot be used as a valid search option.



Report Filters

Case Owner(s)

[See Filter Definitions.](#)
Advanced Search: Put your location name in quotes to show only exact matches. To more easily find a location, you may specify multiple levels by separating with a "?". For example, "Massachusetts/Suffolk/Boston"

Case Type

Open / Closed

Search

[Search any text, or use a targeted query. For more info see the Case Search help page](#)

2. Select **Apply**.

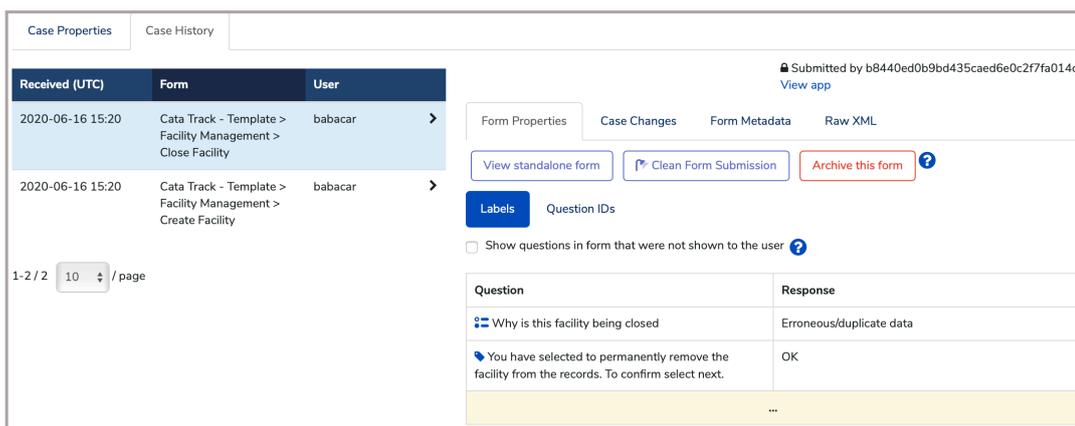
- » All facilities that fit that criteria will appear in the list.

3. Select the **Facility** record to be modified

4. Select **Case History**.

5. Select **Archive this form**.

- » This will undo the facility closure and re-open the facility.
- » A message will appear to confirm form has been archived, re-opening the facility.



Received (UTC)	Form	User
2020-06-16 15:20	Cata Track - Template > Facility Management > Close Facility	babacar
2020-06-16 15:20	Cata Track - Template > Facility Management > Create Facility	babacar

Submitted by b8440ed0b9bd435caed6e0c2f7fa014c
[View app](#)

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
Why is this facility being closed	Erroneous/duplicate data
You have selected to permanently remove the facility from the records. To confirm select next.	OK

Tips and Tricks

If a form facility was opened in error, it should NOT be archived; it may be linked to other forms. If a facility has patients registered to that facility, it cannot be archived, it must be CLOSED due to duplication.

See **Removing Duplicate Facility on CataTrack**.

Removing duplicate facility on CataTrack

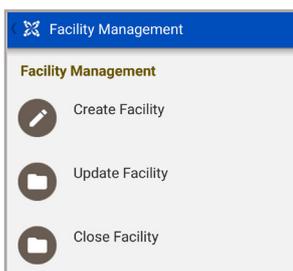
If a facility has been opened in error, it can be closed by Mobile Workers on the phone using the **Close Facility form** within Facility Management and select the form that was closed due to “erroneous/duplicate data”.

Tips and Tricks

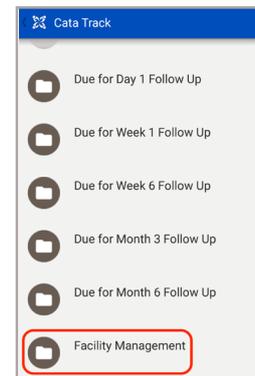
The facility should not have any patients registered into it—if patients have been registered to a facility that should be removed due to duplication, patients must first be reassigned to the correct facility before the duplicate facility is closed.

See Reassign Patients to Different Facilities.

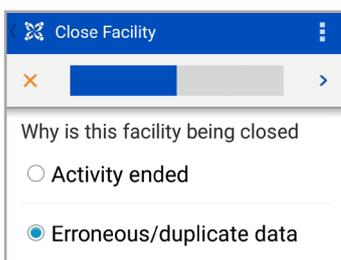
1. Access CaTatrack on the phone or web app.
2. Select **Facility Management**.
3. Select **Close Facility**.
4. Select the **Facility** that must be closed.
5. Review the information to ensure the correct facility will be closed.




ID	Name	State
AA-BN-1	Template Facility	Alpha
AA-BN-3	Test Facility	Delta



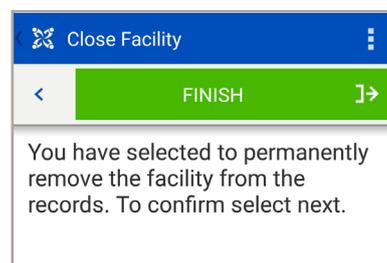
6. Select **Erroneous/Duplicate Data** as reason for closing a facility.
7. Select next (**blue arrow**)
8. Select **Complete**.



Why is this facility being closed

Activity ended

Erroneous/duplicate data



You have selected to permanently remove the facility from the records. To confirm select next.

FINISH

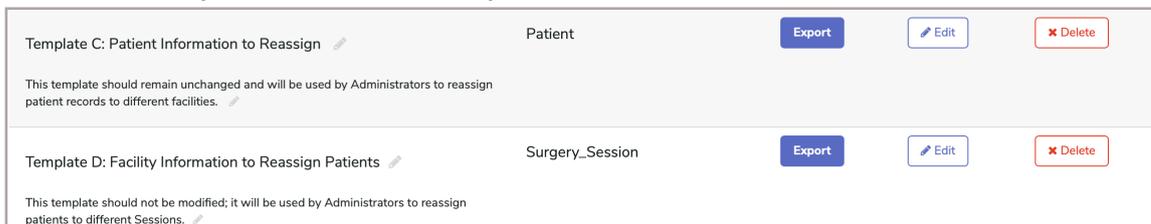
Reassign patient to different facility

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

1. Open the [Case Reassignment Excel template](#) that will be used to upload changes to the records.
 - » The Excel file will be shared by the CataTrack Development Team.

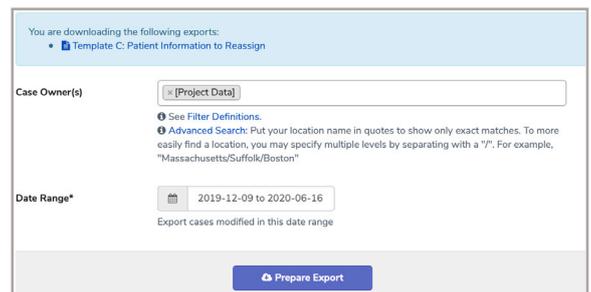
The file should only have four column headings: case_id; parent_id; owner_id, and parent_type – those heading should NEVER be changed.

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 C: Patient Information to Reassign:** This will help you find the unique CommCareID for each **Patient** that must be modified/reassigned to a different facility.
- » **Template D: Facility Information to Reassign Patients:** This will help you find the correct unique CommCareID for the **Facility** 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 facilities and patients from a specific time period, you may include a date range.
 - » Leave blank if unsure.



6. Find Patients to Reassign
 - » Use **Template C** to locate the patients that need to be reassigned.
 - » Only caseid will be used from Template C. The remaining columns should be used to confirm correct patient record is selected.
7. Add caseid(s) for patient(s) to be reassigned to **Case Reassignment Template** under **caseid** column.

caseid	parent_id	name	age	age_months	sex	patient_region_name	patient_district_name	patient_village_name	Reassign Patient To:	Facility	owner_name	owner_id
cb1288fd-dba4-461e-b3f6-6b39826250ec	AA2A2	Hassan Amina	12	—	male	Alpha	Alpha 1	zaria	—	d718c0a-0421-4240-bf49-4be18727e8b9	Alpha 1	d9d0f5e10ae49679dfa13d4
4816cacb-9adc-49b4-9606-381c1de3de59	AA2A1	Musa Danjuma	10	—	male	Alpha	Alpha 1	1 golf course road.	—	d718c0a-0421-4240-bf49-4be18727e8b9	Alpha 1	d9d0f5e10ae49679dfa13d4
abafd72e-97fb-4e33-b26d-3d089b1b4a76	AA2A2	Abdul Musawa	16	—	female	Delta	Delta 2	gidan madman shata, mus	—	d718c0a-0421-4240-bf49-4be18727e8b9	Alpha 1	d9d0f5e10ae49679dfa13d4
5bfa79b-752f-4dfa-b9b0-0d75c3f53ed	AA2A3	Naz Kabir	9	—	male	Delta	Delta 2	Garu	—	d718c0a-0421-4240-bf49-4be18727e8b9	Alpha 1	d9d0f5e10ae49679dfa13d4
0c1e6e20-0944-4464-b30c-640b-f32edf	AA2A2	Danjuma Musa	11	—	male	Alpha	Alpha 1	19 Ghana Road Malali	—	d718c0a-0421-4240-bf49-4be18727e8b9	Alpha 1	d9d0f5e10ae49679dfa13d4

8. Find facility where patient will be **REASSIGNED**.
 - » Use **Template D** to locate the facilities where patients will be reassigned.
 - » Do **NOT** locate the information for the facility where the patient is currently registered; it is only necessary to locate the **TARGET** facility for reassignment.
 - » Only **caseid** and **owner_id** will be used from Template D. The remaining columns should be used to confirm the correct target facility is selected.

facility_id	facility_name	region_name	district_name	address	caseid	owner_id	owner_name
AA-BN-1	Template Facility	Alpha	Alpha 1	Alpha Town	d71f8c0a-0421-4240-bf49-4be18f27e8b9	d9d0fe5e10ae49679dfa13d49537095d	Alpha 1
AA-BN-2	Temporary Facility	Other	Temporary LGA	Temporary Address	2937500c-d662-4f29-bc6d-b58f516a89de	8ba8c881099647eca899c5a311434217	Other

9. Add **caseid(s)** for facility(ies) where patient(s) need to be reassigned to **Case Reassignment Template** under **parent_id**.
 - » This will reassign the patient FROM the facility where they were registered TO the new facility.
10. Add **owner_id** for facility(ies) 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 facility was in the same district as the new facility).
11. Parent_type will be **Surgery_Session**.
12. Save updated Case Reassignment Template

caseid	parent_id	owner_id	parent_type
84f469a6-7eaf-4367-abe6-5c3ba50abff5	2937500c-d662-4f29-bc6d-b58f516a89de	8ba8c881099647eca899c5a311434217	Surgery_Session

13. 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 the 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 CataTrack.

EDIT DATA

Reassign Cases

Import Cases from Excel

Manage Forms

Automatically Close Cases

Case Type to Update/Create

Case type:

Identifying Cases to Update/Create

Excel column:

Corresponding case field: Case ID External ID

Handle New Records: Create new records if there is no matching case

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

→ Select **Confirm Import**.

Match Excel Columns to Case Properties

Excel Field	Case Property	Set to default
<input type="checkbox"/> parent_id	→ parent_id	<input checked="" type="checkbox"/> Create a new property instead
	✓ This field will assign the case a new parent given by the parent's Case ID. You must use along with parent_type.	
<input type="checkbox"/> owner_id	→ owner_id	<input checked="" type="checkbox"/> Create a new property instead
	✓ This field will assign the case to a new owner given by User ID, Group ID, or Organization ID.	
<input type="checkbox"/> parent_type	→ parent_type	<input checked="" type="checkbox"/> Create a new property instead
	✓ Use to specify the parent's case type. Usually used with parent_id or parent_external_id	

[+ Add another matching](#)

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

Recent Uploads						
Status	Time	Case Type	Details	Comment	File	
Success	Jun 16, 2020 14:47 UTC	Patient	1 rows were matched and updated.	Babacar NGOM <small>(Click here to add a comment) </small>	 Reassign Patient Case.xlsx	

Definitions

caseid (Template C (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 D (Facility Information)): This is the unique identification number CommCare used to identify an individual facility in the application. It will be used to know which facility is the target facility where patient will be reassigned.

owner_id (Facility Information): This 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 facility matches the facility district.

Reassign patient from Temporary Facility

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

Metabase DQA Dashboard

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

CommCare Export: Template C

1. Log in to CommCare.
2. Select **Data** ➔ **Export Case Data**.
3. Download **Template C: Patient Information to Reassign**.
4. Use the *Reassign Patient To:* column on Template C (Patient Information) to locate the target facility where the patient should be reassigned.

patient_id	caseid	name	age	sex	patient_district_name	patient_village_name	Reassign patient to :	facility
AA1A10	cefc8814-cbf8-44ff-bf2c-a23804085ea5	FIRD PATIENT	80	male	Alpha 1	VILLAGE 3	AA-BN-3	f099cafc-29f3-4125-a7c9-6736b9ce775d
AA3C12	fb43cd5a-5ec3-4c67-907a-780d5c6e5570	GUERRA Rachi	20	female	Beta 2	founougo	AA-ZX-4	f099cafc-29f3-4125-a7c9-6736b9ce775d
AA2L19	9a6b4e56-28c0-4c6e-a713-7710beafd4d2	bio guerra 3	40	male	Alpha 2	goummori	AA-2B-10	f099cafc-29f3-4125-a7c9-6736b9ce775d

5. Use the Facility ID entered to locate the actual facility on **Template D (Facility Information)**.
6. Follow the steps for **Reassign patient to different facility**.



CataTrack