

# Trainer's guide to Tracker-Capture (Web-Based)

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## What is this guide?

This guide is a support document for DHIS2 Academy trainers for the session "Demonstrating and using tracker capture (Web)."

This session follows the standard Academy training approach with:

1. A live demo session where the trainer demonstrates and explains the features, and
2. A hands-on session with exercises where participants get to practice the same features.

This guide will help the trainer prepare for the live demo session. The "Live Demo step by step" section has a detailed walkthrough of all the steps to demonstrate with explanations and screenshots that should be easy to follow. Use that when preparing for the live demo session.

There is also a Quick Guide which lists the steps very briefly and this is meant as a lookup guide or "cheat sheet" WHILE doing the demo, to help the trainer remember all the steps and the flow of the demo.

## Learning objectives for this session

The overall objective of this session is to use the DHIS2 tracker capture app. Detailed objectives include:

- Understand how to select the correct program
- Understand the layout and options of tracker capture
- Understand how to register a TEI
- Understand how to fill in program stage details
- See how to search for a TEI
- See how skip-logic can be used in a tracker program

## Time Requirements

Live Demo: 1 hour

Hands-on Exercises: 30 minutes

## Background

Tracker capture is a module for individual, itemized data collection.

Tracker capture data entry is organised by program, which is the equivalent of patient registry or other similar data collection tool. As programs are entered on an individual basis, program based data is entered based on the report or enrollment date as defined by the programs requirements. Tracker capture by design is not anonymous in nature, and therefore person details are attached to each event.

In this demo, the **COVID-19 (Vaccine Registry and Case-based surveillance)** demo programs that have been created will be used to demonstrate the features of tracker capture.

**COVID-19 (Vaccine Registry and Case-based surveillance)** The COVID - 19 program is based on an in-country pilot of a tracker in Laos. The case based surveillance programs enrolls and tracks the suspected case, captures symptoms, demographics, risk factors, and creates lab requests.

## Preparations

Ensure that there are existing records in the DB and that you are able to register TEI's and enter event data correctly.

You should consider running through the entire demo prior to presenting it. After this, you should take the quick guide and supplement it with any additional notes you made while running through the demo. If you identify any changes that may be required or additional explanation that would be helpful within the session, please content the training content team in order to allow us to evaluate how to best integrate this feedback into the material.

Also, the learner's guide and session summary are the main material that will be provided to the learner's with both detailed steps for ungraded exercises as well as the key messages from the session. Review these as well to ensure you are able to get these key points across during your demonstration.

## Best Practices

Before starting the demonstration, please keep in mind that the most important thing is that the audience is following, so make sure to ask questions to the audience to verify that they are following. If something is unclear, go back and go through it slowly. If you don't have time for all the steps, it is better to cut some steps, than to go fast while nobody understands.

Prior to starting the actual demo, It is a good idea to do a quick overview of the stages and program flow so everyone understands the use-case clearly.

In an online setting, you will be breaking regularly to allow them to perform various ungraded exercises in order to keep them engaged.

If the participants are doing the demo with you at the same time, you can take time to go around the audience and help them if the academy is happening onsite. There should be a team of trainers doing this at all times as well.

## Quick Guide /Steps to be followed:

Go over the Vaccine Registry Program used in this tracker program to demonstrate the participants the data capture for a program with repeatable stages.

1. Open **Tracker Capture** and navigate to CHW Mahosot. Select the Vaccine Registry Program as the tracker program.
2. Explain the **tracker capture interface** and options including:
  1. The main page listing the tracked entities
  2. Filters, sorting, adding columns, downloading the TEI list
  3. System generated UIDs

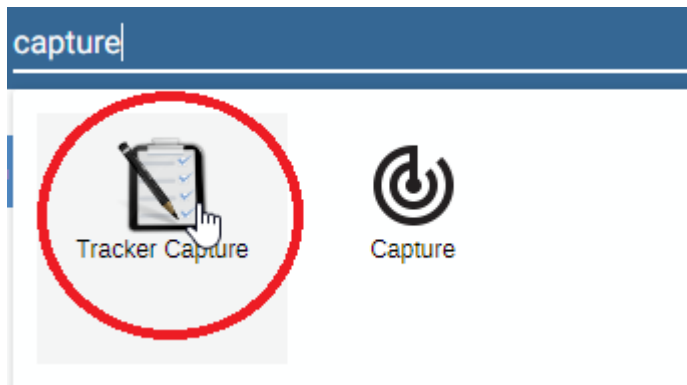
3. **Register a TEI** : You can start with a duplicate record that already exists (Sharon) in order to show the process of identifying duplicates. In this case, since she already exists there is no need to register her. You can go to her tracker dashboard instead to review her completed events.
4. Now search for a person that is not registered in the system. Proceed to register them.  
**Note** that it will bring in the attributes filled during the search over to the registration page so you do not need to fill in these details again.
5. Ensuring that the date chosen for the vaccine of the person being registered in the system for the vaccine.
6. Describe the features of the tracker dashboard including:
  1. The buttons at the top of the page
  2. Widgets and their descriptions
  3. Persistent top bar
7. Add **Relationship** and explain.
8. Add a **new event** and review the data entry widget including -
  1. Legend, Audit History, Compare Forms, Buttons to add/schedule new events, the program stage and data entry areas
9. Complete data entry for one stage while describing that there are rules and warnings in place for the vaccination and other underlying conditions.
10. Complete the event and schedule another event for the next vaccine dose. The system will generate a second dose vaccine dose date depending upon the selection of vaccine.
11. Define the **date of services given** to be the same as the scheduled date and review the data entry form again.
12. Compare the events using the **compare form button**.
13. Create a **Referral** for a new event to another facility and explain what happens as part of this process. Go to the **new facility** to see the record there.
14. Enroll the entity in another program to show that this can occur.
15. **Search for a TEI** with no program using the person TE type. The attributes that appear here are defined by the user.
16. Register a TEI with no program, then subsequently enroll them in the immunization program.

## Live Demo step by step

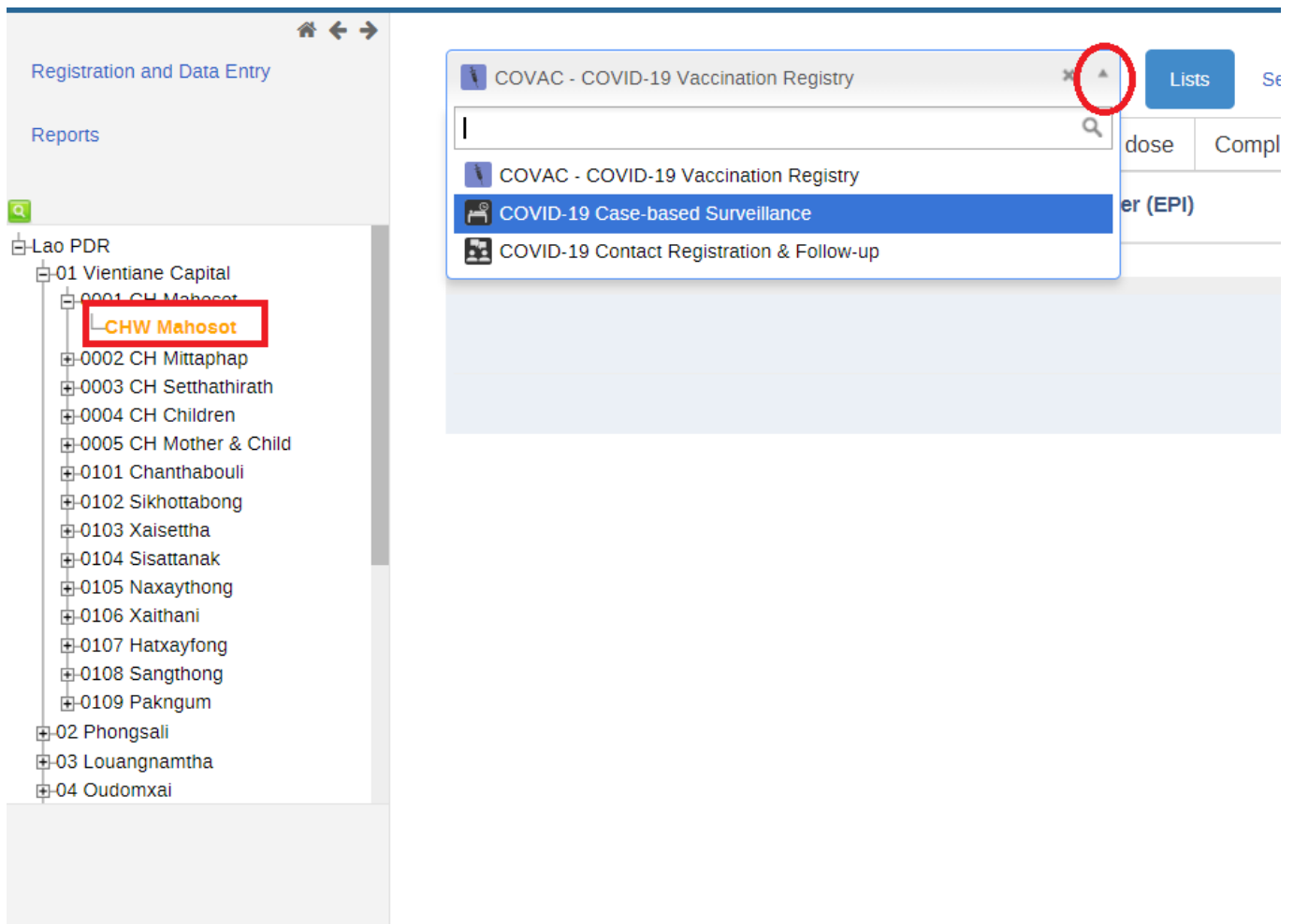
### Part 1: Explain the initial tracker capture interface and options

#### COVAC - COVID-19 Vaccine Registry Overview

1. Open Tracker Capture from the Apps menu



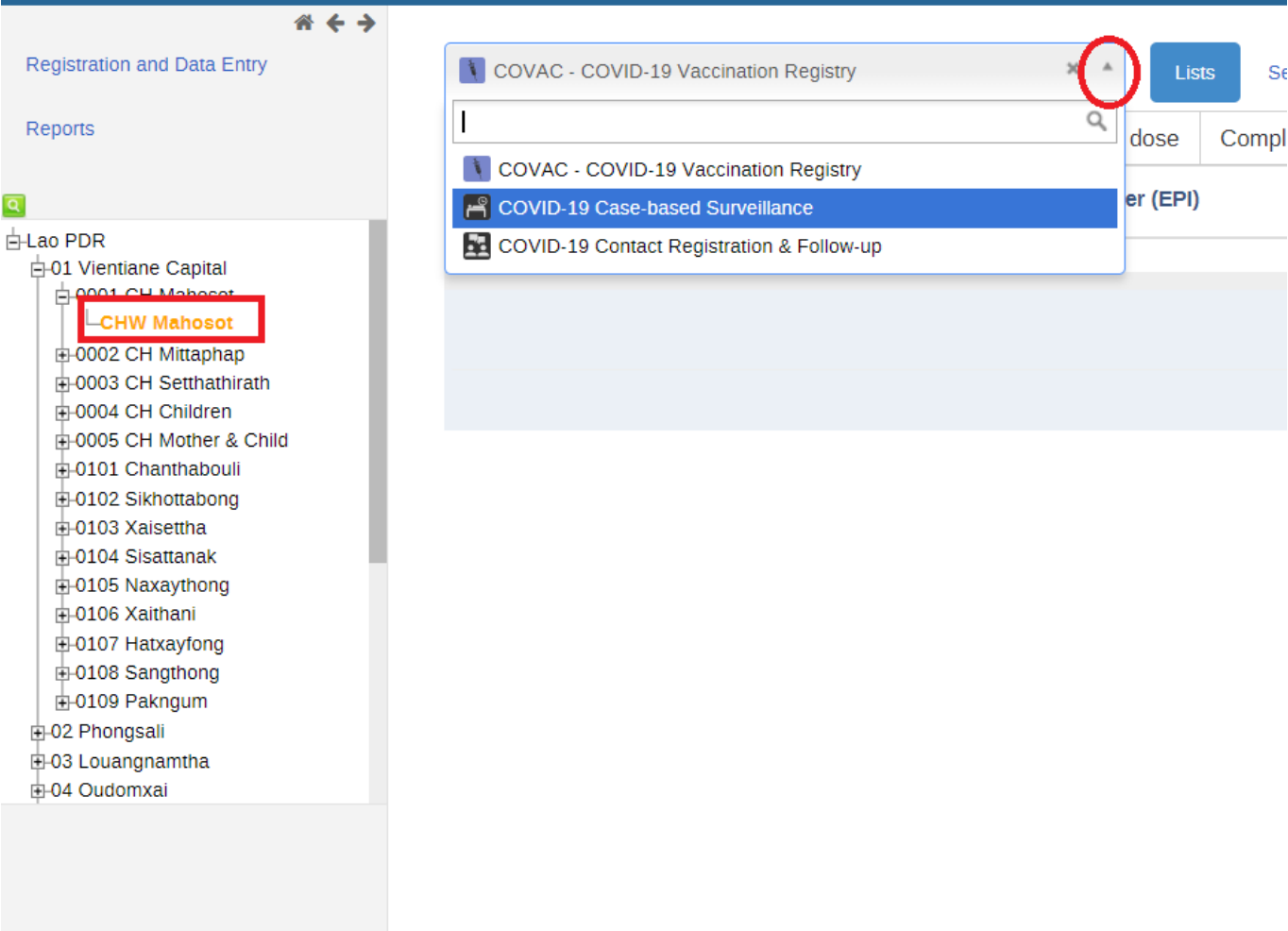
## 2. Find and select the site (organisation unit) in the org unit hierarchy



The **"COVAC - COVID - 19 Vaccine Registry tracker program"** is linked to any Organization Unit at the health facility level and above. CHW Mahosot has some example cases already entered. Click on the '+' symbol to expand the hierarchy in the desired branch. For example, to find "CHW Mahosot", expand Lao PDR, then 01 Vientiane Capital, then 0001 CH Mahosot and finally CHW Mahosot. Click on the site name to select it. When selected the org unit's name will change color to orange.

## 3. Select a Program

Only programs relevant (allocated) to the selected org unit and user will show up in the Program drop down list. If the COVAC - COVID -19 Vaccination Registry is not already selected, make sure to select it from the program list under the "Tracker Capture" heading.



**Note :** that any person that is already registered will be displayed in a tabular fashion, with each row corresponding to a single record in the "All Clients" tab.

COVAC - COVID-19 Vaccination Registry

Lists

Search

Register

Clients with a scheduled visit

Clients with an overdue vaccine dose

Completed clients

All clients

Custom working list

National ID	Unique System Identifier (EPI)	First Name	Surname	Sex
ID-4680548	EPI_00008216	Dominique	Sheri	Female
ID-2099397	EPI_00009935	Timothy	Edward	Male
ID-5862482	EPI_00010604	Kimberly	Michelle	Female
ID-8945833	EPI_00011285	Sharon	Michele	Female
ID-1734154	EPI_00010994	Autumn	Emily	Female
ID-1049089	EPI_00012169	Cody	Lynch	Male
ID-2104755	EPI_00002885	Nicholas	David	Male
ID-9534041	EPI_00005958	Kelly	Bill	Female
ID-1865116	EPI_00001713	Jenny	Ashley	Female
ID-1181264	EPI_00000722	Lori	Ryan	Female

Number of rows per page: 50

Jump to page: 1

« « 1 » »

Clients with a scheduled visit will be seen under the first tab " Clients with a Schedule Visit"

The above tabs are configured at the API level for this program.

If you go to the "Case based Surveillance" program you will see the list below which is coming through the attribute display list option.

DRIS 2

Search apps

Registration and Data Entry

Reports

COVID-19 Case-based Surveillance

Lists

Search

Register

Custom working list

System Generated Case ID

First Name

Surname

Date of birth

Sex

COVID19\_0000609

David

Walter

1991-07-19

Male

COVID19\_0000786

Kristy

Nichole

1966-07-19

Female

COVID19\_0001188

Bryan

Jeffrey

1983-07-19

Male

COVID19\_0001464

Tina

Renee

1991-07-19

Female

COVID19\_0001562

Katie

Kristina

1997-07-19

Female

COVID19\_0001933

Jennifer

Kristen

2008-07-18

Female

COVID19\_0002020

Eduardo

Robert

1975-07-18

Male

COVID19\_0002031

Jason

Donna

1978-07-18

Male

COVID19\_0002059

Stacey

Krista

2006-07-18

Female

COVID19\_0002221

Paul

Scott

1992-07-18

Male

COVID19\_0002236

Michael

Rodney

1995-07-18

Male

COVID19\_0002401

Brenda

Richard

1993-07-18

Female

COVID19\_0002716

Brian

Jennifer

1965-07-18

Male

COVID19\_0002818

Darren

Anthony

1942-07-18

Male

COVID19\_0002882

Moiv

Jennifer

1970-07-18

Female

After you have explained the interface options, proceed to register a TEI into the program.

Part 2 : Registration

**Register a TEI into the COVID-19 case-based surveillance program:** During registration, it is possible to stay on the same page and keep registering more than one entity. You can also go straight to the dashboard of the registered TEI. Selecting a program and doing registration also performs enrollment into the program at the background. If a TEI is registered without a program, then enrollment is possible from the TEI dashboard. Both skip-logic and validation error/warning messages are supported during registration.

Register

**Enrollment status filters:** If a program is selected, the app provides further filtering on the table based on enrollment status. This is displayed in the following order:

- Any enrollment status
- Only those with active enrollment
- Only those with completed enrollment
- Only those with cancelled enrollment



**Custom Working List :** This allows you to apply a custom filter to the list of TEI's that are displayed.

Custom working list ▾

Organisation unit scope

☒ Selected  
☐ Immediate children  
☐ All children

Enrollment status

☒ All  
☐ Completed  
☐ Active  
☐ Cancelled

Case Registration Date

Start date

End date

User assignment

☐ No requirement  
☐ Any  
☐ None  
☐ Current  
☐ Specific users:

Local Case ID

System Generated Case ID

**Export the TEI list:** You can export the list of TEI based on the filtering criteria you have selected in CSV, XML or JSON format.



**Select columns to show:** Here you can select which attributes from the TEI you would like to show on the front page line-list.

Select columns to show

Registering unit	<input type="checkbox"/>
Registration date	<input type="checkbox"/>
Inactive	<input type="checkbox"/>
System Generated Case ID	<input checked="" type="checkbox"/>
First Name	<input checked="" type="checkbox"/>
Surname	<input checked="" type="checkbox"/>
Date of birth	<input checked="" type="checkbox"/>
Sex	<input checked="" type="checkbox"/>
Country of Residence	<input type="checkbox"/>

Save

Explain the system generated ID's

System generated ID's can follow patterns that are defined by the user. This example uses the "COVID19 - Sequential number"

```
COVID19_0000609
```

Go to the registration page and see that the ID will be generated. These ID's can be a bit dynamic depending on the pattern that is defined to generate them. You can use inputs such as the date (used in this example), org unit codes, etc. The best resource to learn more is here:

<https://docs.dhis2.org/master/en/user/html/working-with-textpattern.html>



Register a new TEI

Click on "Register" to register a new TEI. You will then be faced with the Enrollment screen for the program. The enrollment screen lists all the attributes that are associated with the program.

In later sessions, you will go over the terminology in more detail so just focus on describing the interface and actions for now. Enter a TEI that already exists (**Sharon**) in the system. You will be notified that a possible duplicate has already been found.

Review possible duplicates before registration

Registering unit	Registration date	Inactive	First Name	Sex	System Generated Case ID	Surname
HC Khokka (Ta-ngon)	2022-06-09	No	Sharon	Female		Lawrence
HC Phokhem	2022-06-09	No	Sharon	Female		Long
HC Mixai	2022-06-09	No	Sharon	Female		Hamilton
HC Tantheung	2022-06-09	No	Sharon	Female		Farrell
HC Thaxouang	2022-06-09	No	Sharon	Female		King
MMT Champasak	2022-06-09	No	Sharon	Female		Hamilton
HC Nongseng	2022-06-09	No	Sharon	Female		Gilbert

If you think this is not a duplicate case you can back out of the duplicate screen.

Fill in additional details and try to register. It will once again give you the potential duplicate. Click on the record to be taken to their dashboard.

HC Phakbuak	2022-06-09	No	Sharon	Female		Jones
HC Namnyon (Houayxay)	2022-06-09	No	Sharon	Female		Burnett
HC Khetxenkhlok	2022-06-09	No	Sharon	Female		Perez
HC Namon (Vangviang)	2022-06-09	No	Sharon	Female		Cooley
HC Somboun (Phouvong)	2022-06-09	No	Sharon	Female		Mccormick
PPM Xianghon	2022-06-09	No	Sharon	Female		Ortiz
HC Namnen	2022-06-09	No	Sharon	Female		Smith

Number of rows per page: 
Jump to page:

«« « 1 »»

Open any of the duplicate candidates above, or click to register as a new person

Back
Register new person

Click on Register new person when the record is not found.


**Note :** This is a critical part of using a tracker and is meant to reduce the number of duplicate registries in the system. It should be emphasized that, when using tracker programs, we always emphasize searching for existing cases prior to registering new ones.

The details you entered during search will be brought over to the registration page so you do not need to enter them again. You can fill in the remaining fields in order to register the person.

## Enrollment

Enrolling organisation unit	CHW Mahosot
Date of registration	2024-01-02

## Profile

Point on map	Latitude	Longitude	
National ID			
Unique System Identifier (EPI)	EPI_53832197		
First Name	Sharon		
Surname	thakur		
Sex	Select or search from the list		
Date of birth is estimated	<input checked="" type="checkbox"/>		
Date of birth	yyyy-MM-dd		
Mobile phone number			
Home Address			
Area	Select or search from the list		
Occupation	Select or search from the list		

**Save and continue**

Save and add new

Print form

Cancel

After entering the details proceed to click on "Save and continue" in order to register the TEI.

## Register and Search Using Capture App

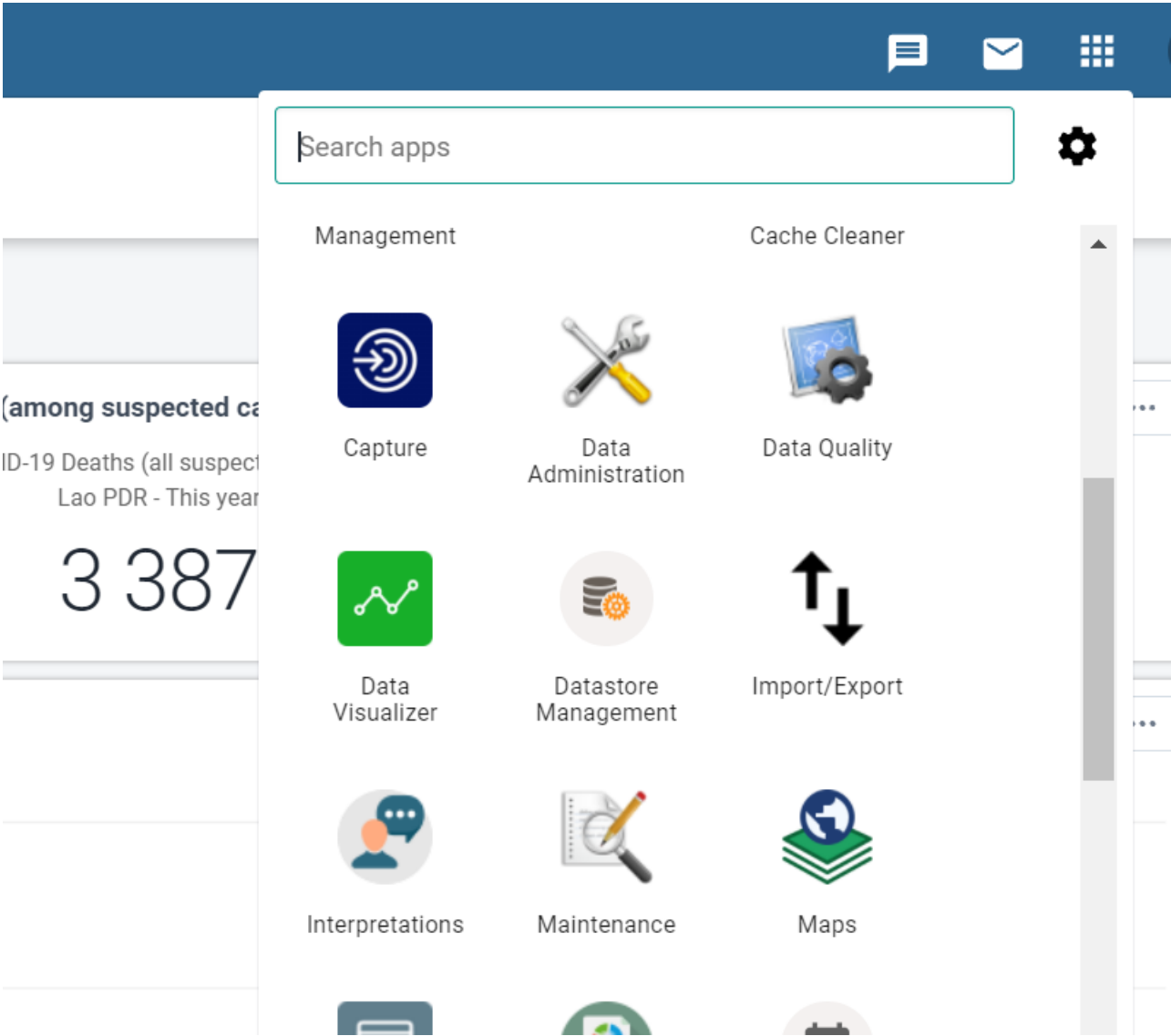
The capture app now has more support for tracker programs than before. Users will now be able to list and interact with tracked entity instances much in the same way as events, and will have access to searching and registering/enrolling tracked entity instances in the Capture app itself. The navigation between the apps will happen seamlessly. This will allow data entry user to access tracker and event data in the same place, and have a more integrated workflow.

We will discuss how to do registration and enrollment using capture app.

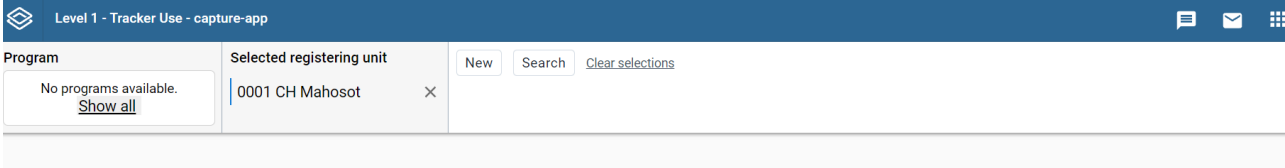
There are two different ways one can register a tracked entity under an organization unit. The first way, is to register a tracked entity instance without enrolling it to a tracker program. The second option, is to register a tracked entity instance with program and enroll it.

## Without a program enrollment

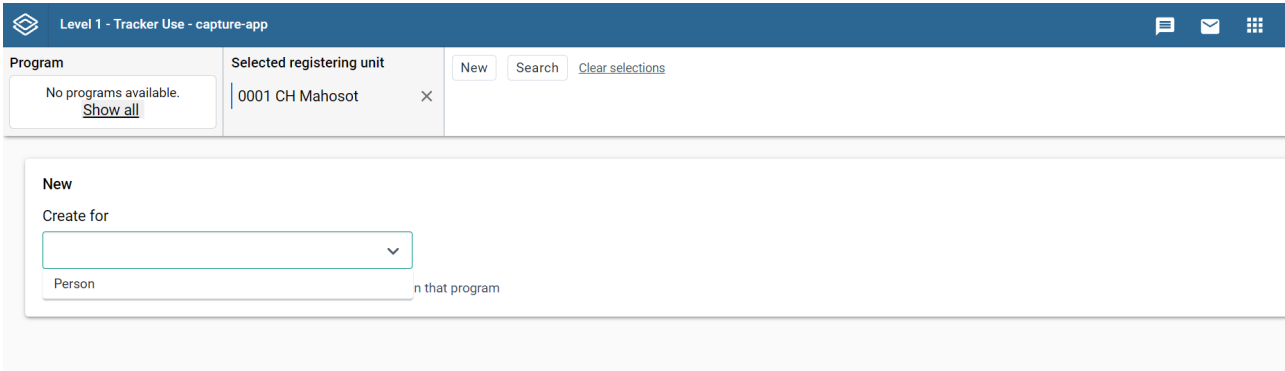
1. Open the Capture App from Search bar.



2. Select an Organization unit.

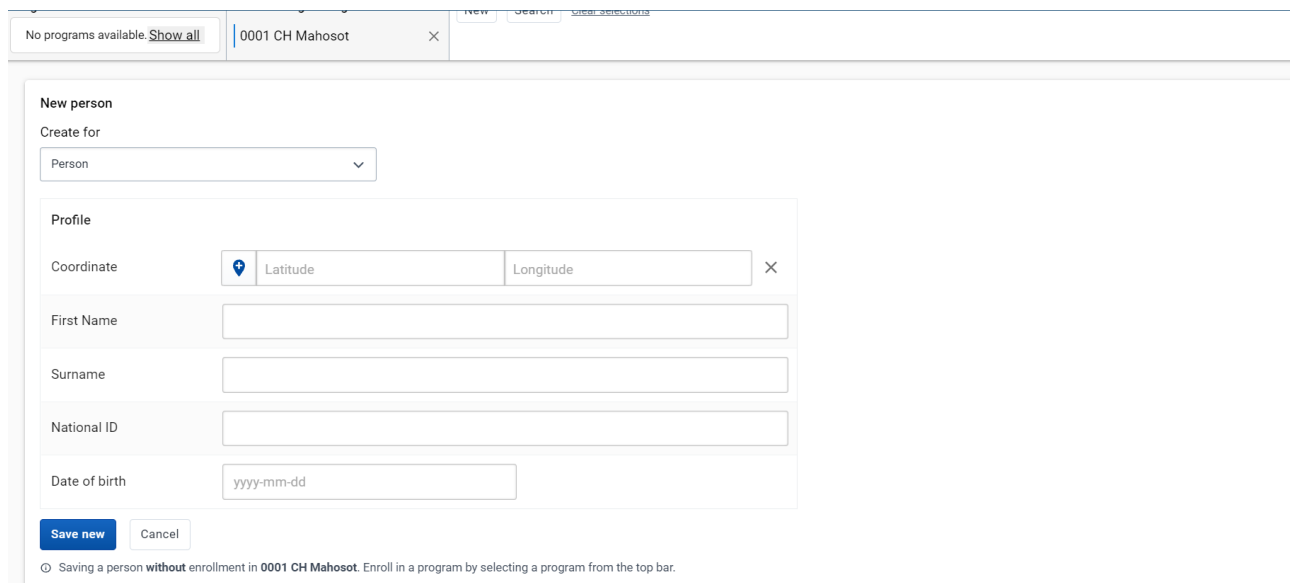


3. Click the **New** button. From the dropdown menu you can select a tracked entity type.



The moment you select a tracked entity type, a form will be shown on the screen

4. You can see the profile page of the peron and can enter the relevant demographics details.

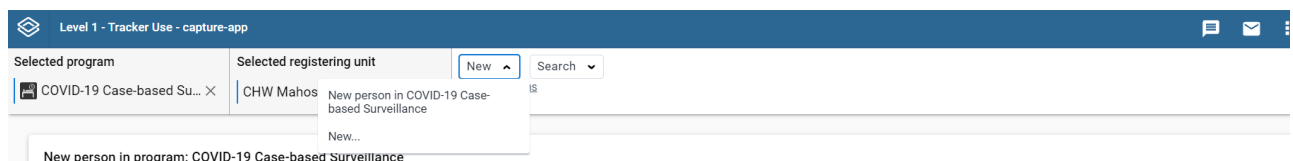


5. Click on Save new and you will now be prompted to the tracked entity dashboard.
6. The dashboard will show information about the newly created tracked entity instance.

### With a program enrollment

You need to follow the similar steps as explained above but for this you will select a relevant program also.

1. Open the Capture app.
2. Select an organization unit.
3. Select a tarcker program in this case **COVID-19 Case based Sureveillance**.
4. Click on **New** drop down button and select the first option.



The form will have two sections. The first section has the title "Enrollment". There you will add all the information relevant to this program's enrollment. The second section has the title "Profile" there you will add data relevant to the tracked entity instance. The profile section mainly contains all the tracked entity attributes linked to the program or tracked entity type.

Level 1 - Tracker Use - capture-app

Selected program

COVID-19 Case-based Su... X

Selected registering unit

CHW Mahosot X

New Search Clear selections

New person in program: COVID-19 Case-based Surveillance

Enrollment

Case Registration Date \*2021-10-23

Profile

Coordinate

Latitude

Longitude

System Generated Case ID

COVID19\_0001258

Local Case ID

First Name

Surname

Date of birth

yyyy-mm-dd

3. Click on Save new and you will now be prompted to the tracked entity dashboard. 4. The dashboard will show information about the newly created tracked entity instance.

STOP - Perform Exercise 1

Part 3 : Describe the Tracker Dashboard

Back COVAC - COVID-19 Vaccination Registry

Enrollment

Selected program

Owned by: CHW Mahosot

Enrolling organisation unitCHW Mahosot

Date of registration2024-01-02

Complete Deactivate Delete

Other programs

No active enrollments exist

Indicators

Timeline Data Entry

2024-01-07 CHW Mahosot Vaccination (Scheduled)

Dose given on (Vaccination date) \* yyyy-MM-dd

Dose due date Reschedule due date 2024-01-07

Feedback

Profile Edit

National ID

First NameSharon

Surnamethakur

Sex

Date of birthyyyy-MM-dd

Relationships | Add

No relationships exist

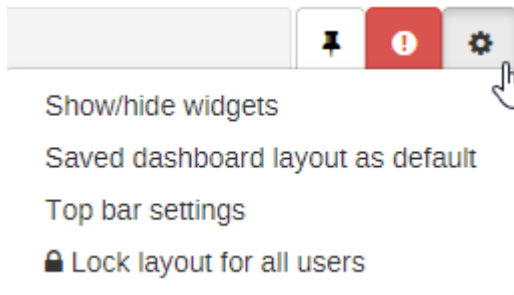
Notes

The dashboard starts with 5 items at the top:

- 1. **Back button** - this helps to go back to the search and registration page
- 2. **Persistent top bar** - this is configurable by the user and can include different aspects from the program. You can show them how to edit what appears in the top bar
- 3. **Previous and Next buttons** - these are buttons to access the previous/next TEI details
- 4. **Program selection menu** - this is to dictate what kind of data to record and track for the selected TEI. This also affects the contents of the widgets.
- 5. **Small Pin icon at the right corner** - this allows to pin (or stick) the right side of the widgets. This is useful especially during data entry. If for example there are many data elements or big forms to fill,

sticking the right side helps to remain visible while scrolling the data entry part.

6. **Small gear icon at the right corner** - Clicking on the gear icon allows you to perform several different actions. Explain these different actions along with the different widget types that are available.



- **Show/hide widgets:** this helps to control which widgets to display. There are nine widgets available to display. The widgets are collapsible, responsive and draggable - this helps to acquire optimal view area as per user needs. Widget (re)arrangements are saved automatically per user per program.

# Select widgets to show

Tabular Data Entry	<input type="checkbox"/>	
Enrollment	<input checked="" type="checkbox"/>	
Feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/> Use as top bar
Indicators	<input checked="" type="checkbox"/>	<input type="checkbox"/> Use as top bar
Messaging	<input type="checkbox"/>	
Notes	<input checked="" type="checkbox"/>	
Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/> Use as top bar
Relationships	<input checked="" type="checkbox"/>	
Report	<input checked="" type="checkbox"/>	

Close

- **Save dashboard layout as default:** widgets arrangement is saved automatically every time a widget's position or state (expand/collapse) is changed. However, for the entire layout to be considered a default layout for the selected program it is required to explicitly save as "Default layout".
- **Top bar settings :** allow you to modify the top bar options.



## Top bar settings

Activate top bar

☐

Attribute	Show	Sort order
Surname	<input type="checkbox"/>	
National ID	<input type="checkbox"/>	
Unique System Identifier (EPI)	<input type="checkbox"/>	
COVID - Occupation	<input type="checkbox"/>	
Date of birth	<input type="checkbox"/>	
Home Address	<input type="checkbox"/>	
Area Urban Rural	<input type="checkbox"/>	
Date of birth is estimated	<input type="checkbox"/>	
Mobile phone number	<input type="checkbox"/>	

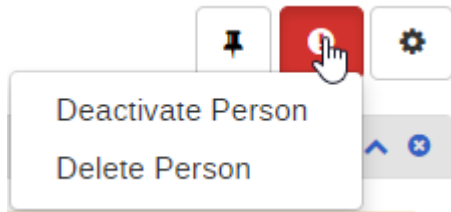
Cancel

Save

After you modify it, you should see the persistent top bar present. This should remain wherever you scroll within the TE dashboard.

Surname : tha	Unique System Identifier (EPI) : EPI_56904656	Age : 17
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- **Lock layout for all users** : This is only for system admins. They can create a default layout in which all users will see in the tracker dashboard. When this is enabled non-system admins will not be able to alter the layout or add/remove widgets from the dashboard.
1. **Red icon at the right corner** : this allows to delete or deactivate the record. Clicking on the red icon allows you to following 2 functions:



- **Delete Person (or TEI)** - This deletes the TEI and all the data associated with TEI
- **Deactivate Person (Set TEI to active/inactive)** - this has nothing to do with widgets or the dashboard but it helps to set the status of dashboard owner (the TEI) to either active or inactive. If a TEI is set to inactive, only read operations are allowed - no data entry, no profile editing, no enrollment.

This is permission based, so not everyone will have the authority to perform this function.

## Widget Descriptions

1. **Data Entry** - This is for doing data entry using either default or custom forms. Depending on program definition, in particular program stages, events will be displayed in a timely fashion. Clicking on any of them displays the corresponding data entry. If a stage needs a new event, a plus icon is displayed for new event creation. To proceed with data entry, it is mandatory to have an event date. Once an event date is specified it is not possible to change the due date. The assumption is that by specifying the event date, the event has already taken place. If the event hasn't occurred yet, it is possible to change the due date - this is effectively doing nothing but rescheduling. The buttons at the bottom help to change the status of a selected event. Another key feature from this widget is the addition of multiple notes for an event. Normally data recording is through data elements, however there are cases where it is necessary to record additional information or comments. This is where the notes section comes handy. However, an interesting feature here is - it is not possible to delete a note. The idea is that notes are more like log books. Both skip-logic and validation error/warning messages are supported during data entry.
2. **Enrollment** - This helps to enroll the TEI for the selected program. If an active enrollment already exists, the widget automatically displays it with some details about it. The widget also helps to do some operations on the selected enrollment - for example complete / cancel or a possibility to mark the enrollment for followup. The later one helps for example to deal with high-risk cases during case follow-up. A link to history is also provided if the TEI has historical enrollment.
3. **Feedback**- In this widget you can place summary information about the TEI for review. For example if the person has allergies or you want to display information on which vaccines they have received until now you can place this information here based on what has been entered in the program
4. **Indicators** - Any indicator defined for the selected program will have its value calculated and displayed under this widget.
5. **Messaging**: With messaging, you can send an SMS to the phone number that was registered directly from the dashboard
6. **Notes** - This is the same as event notes. The difference between the two is that, here notes are attached not to events but to enrollments. This helps to record some notes based on enrollment - for example why is an enrollment terminated or what is the overall observation of the TEI throughout the

enrollment. In addition, if the tracked entity has registered a phone number, messaging will be available here.

7. **Profile** - This is to edit TEI's profile or attributes. Here, if the TEI has an attribute of value type "Tracker Associate", a small icon next to the input field is displayed. Clicking the icon opens a popup where users are allowed to either search or register a new associate.
8. **Relationship** - This helps to relate the selected TEI (the one whose dashboard is shown) to another TEI. Adding a relative is possible by either searching from existing or registering a new one. If a program is selected while registering a new one, the new one will be automatically enrolled to the selected program. Another interesting feature in the relationship widget is attribute inheritance. For example having a contact relationship with the COVID -19 affected patient for this you want to add a relationship with a person with a current patient that has been registered in a case based surveillance program. If among others first name, last name and address attributes are required for both Programs.
9. **Report** - This is to provide a "journal" of the TEI per program. A report row is provided for each program the TEI is/was associated with.

## STOP - Perform Exercise 2

### Part 4 : Data Entry Steps

Select the Date and fill out the data. When selecting which data elements look out for the total doses and suggested dose for the next dose. This is a result of using program rules which have been defined to allow for these to be hidden upon the appropriate selection of another data element value. When you have entered some data, click on "Complete."

Vaccine manufacturer	Select or search from the list
Vaccine batch/lot number	
Vaccine expiry date	yyyy-MM-dd
Dose number	1st dose
Total doses required for this vaccine product	2
Suggested date for next dose	2024-01-18
Health worker identification	
Has the client had any adverse reaction following the immunization?	<input type="radio"/> Yes <input type="radio"/> No

CompleteDeletePrint form

A prompt will ask you if you are sure you want to complete the event.

### Complete

Are you sure you want to complete the selected event?

Be aware of these warnings:

COVAC - Vaccine Name: This vaccine product is recommended for people 18 and older.

Complete

Complete and exit

Cancel

Also it will show you warnings based on the data value entered in the form.

After you complete , you can schedule another event. In this scenario the system will automatically schedule a new event based on the next dose date suggested through program rule on the basis of duration and type of dose. This will bring up a new window in which you can select the program stage (there is only one repeatable program stage in this particular example) as well as the "incident date" which has been defined as the "Date of services given" for this program. ***It is a good idea to schedule the "Date of services given" to be the same as the next date of vaccination which comes from the date of first dose given.*** This is all to take advantage of the program rules that are in place to allow for different vaccines to appear based on the schedule defined previously. When you have selected the right details, click on "Save."

Schedule new event for stage Vaccination

Program stage

Vaccination

Dose due date

2024-01-15

Save

Cancel

**Note** when you have a scheduled event, the color changes. This event is "Overdue" because it was scheduled in the past. Here we can reschedule the due date if required. In a real situation, this may not also match the due date, but for this example let us keep it the same to demo the program rules.

**Timeline Data Entry**

**Legend**

Event is completed	Event is open	Event is scheduled	Event is overdue
--------------------	---------------	--------------------	------------------

2024-01-05 CHW Mahosot Vaccination (Open) → 2024-01-15 CHW Mahosot Vaccination (Scheduled)

Dose given on (Vaccination date) \*  Dose due date

When you are done click on complete. Schedule a new event and go back or click on "Complete and exit."

## Add a New Event

In order to add a new event, click on the "Add new" button in the data entry widget.

## Review the Data Entry Widget

**Timeline Data Entry**

ACTIVATE LEGEND, AUDIT HISTORY, COLLAPSE WIDGET

**Legend**

Event is completed	Event is open	Event is scheduled	Event is overdue
--------------------	---------------	--------------------	------------------

2024-01-05 CHW Mahosot Vaccination (Completed) → 2024-01-15 CHW Mahosot Vaccination (Scheduled)

PROGRAM STAGES

EVENT MENU, ADD NEW EVENT, SCHEDULE NEW EVENT

Dose given on (Vaccination date) \*  Dose due date

**Underlying Conditions**

Any underlying conditions?

**Pre-immunization Questions**

Has the patient been infected with COVID-19 within the last 90 days?

**Vaccination information**

BNT162b2 / COMIRNATY Tozinameran (INN) / BioNTech/Pfizer

From the screenshot above, we can see a number of different items within the data entry widget.

- **Activate Legend** : This activates/deactivates a legend which shows what the color of the program stage is describing.
- **Audit History** : In the audit history changes to any of the data elements can be reviewed and searched. This can also be done for the attributes where a similar icon is available in the profile widget.
- **Collapse Widget** : This will minimize/maximize the widget on the dashboard.
- **Program Stage Area**: In this area, the program stages are listed along with their dates and color status.
- **Event Menu, Add new event, Schedule new event** : In this area we can perform the described actions as required.

- **Data Entry Area** : This is where the actual data related to a specified program stage is entered. This can differ between program stages, and as you will demo, program rules can also cause this to vary within a repeatable stage.
- **Compare the forms** using the compare form button: After you have at least registered 2 events, use the compare form button to compare the events within the program

Data element	Vaccination 1	Current (Vaccination 2)
Dose given on (Vaccination date)	2021-08-12	<input type="text" value="2021-09-12"/>
Organisation unit	CHW Mahosot	CHW Mahosot

Underlying Conditions

Data element	Vaccination 1	Current (Vaccination 2)	
Is the patient pregnant or lactating?		<input type="text" value="Select or search from the list"/>	
Pregnancy gestation (weeks)		<input type="text" value="Select or search from the list"/>	
Any underlying conditions?		<input type="text" value="Unknown"/>	
Cardiovascular disease, including hypertension	<input type="checkbox"/>	<input type="checkbox"/>	
Chronic Lung Disease	<input type="checkbox"/>	<input type="checkbox"/>	
Diabetes	<input type="checkbox"/>	<input type="checkbox"/>	
Immunodeficiency	<input type="checkbox"/>	<input type="checkbox"/>	

Add a Relationship

To add a new relationship, click the "Add" button on the relationships widget.

Relationships

Add

No relationships exist

Select the relationship type. In this case, you will contact relationship with case based surveillance program

Add relationship

Has Been in Contact with

On the left side you will see the information relating to the TEI that you are registering. On the right side you will see other TEI's that are registered.

Add relationship

Add relationship

Has Been in Contact with

Has Been in Contact with

National ID1234-45676

Unique System Identifier (EPI)EPI\_56904656

First NameSharon

Surnametha

Sex

Date of birth is estimatedtrue

Date of birth2021-09-01

Mobile phone number

Home Address

Area Urban Rural

COVID - Occupation

Person search results

Registering unit	Registration date	Inactive	First Name	System Generated Case ID	Surname
DW Fuang	2021-07-18		Anthony	COVID19_0003847	Tammy
HC Nakapong	2021-07-18		Elizabeth	COVID19_0015079	Chambers
HC Naonua	2021-07-18		Samantha	COVID19_0015077	Alexandra
HC Khokkhaodoh	2021-07-18		Kathryn	COVID19_0011365	Aaron
HC Naham	2021-07-18		Timothy	COVID19_0015075	Victor
DW Nakay	2021-07-18		Mathew	COVID19_0003835	Ashley
HC Photang	2021-07-18		Jonathan	COVID19_0018702	Emily

You can select the program and use search to filter TEI’s. You may have, for example, a contact relationship with COVID - 19 affected patients.

Immunization

Register

Organisation unit scope

Selected

Immediate children

All children

Enrollment status

All

Completed

Active

Cancelled

Date first seen

Start date

End date

Child Number

First Name

Wei Wei

Select the TEI. It will bring up their details. Click on “Save” to save the relationship.

This person has been in contact with → This person has been in contact with

National ID	1234-45676
Unique System Identifier (EPI)	EPI_56904656
First Name	Sharon
Surname	tha
Sex	
Date of birth is estimated	true
Date of birth	2021-09-01
Mobile phone number	
Home Address	
Area Urban Rural	
COVID - Occupation	

Local Case ID	
System Generated Case ID	COVID19_0015075
First Name	Timothy
Surname	Victor
Date of birth	1992-07-18
Age	
Sex	Male
Country of Residence	
Facility contact number	
Home Address	
First Name (parent or carer)	
Surname (parent or carer)	
Mobile phone number	
Workplace/school physical address	

Save

Close

The relationship will then be added to the relationship widget. If you click on the TEI in the relationship widget, it will take you directly to their dashboard.



Relationships | Add

Relationship	Person First Name	
This person has been in contact with	Matthew	

Make a Referral

Refer new event for stage Vaccination

Program stage

Vaccination

Organisation unit

Lao PDR

01 Vientiane Capital

0001 CH Mahosot

CHW Mahosot

0002 CH Mahosot

0003 CH Sethathirath

0004 CH Children

0005 CH Mother & Child

0101 Chanthabouli

0102 Sikhottabong

0103 Xaisettha

0104 Sisattanak

0105 Naxaythong

0106 Xaithani

0107 Hatxayfong

0108 Sangthong

0109 Pakngum

02 Phongsali

03 Louangnamtha

04 Oudomxai

05 Bokeo

06 Louangphabang

07 Houaphan

08 Xainyabouli

09 Xiangkhouang

10 Vientiane

- Search and select the record to view it in the new facility.
- Select the facility and click on Save options.
- Explain different referral options.

Indicators

Age

17

Vaccine previously taken

AZD1222 / AstraZeneca

Timeline Data Entry

2021-09-12  
CHW Mahoost  
Vaccination  
Completed

2021-09-12  
CHW Mahoost  
Vaccination  
Overt

2021-09-12  
CHW Mittaphap  
Vaccination  
Scheduled

Data element	Vaccination 1	Vaccination 2	Current (Vaccination 3)
Dose given on (Vaccination date)	2021-09-12	2021-09-12	yyyy-MM-dd
Due date	2021-09-23	2021-09-23	Reschedule due date 2021-09-12
Organisation unit	CHW Mahoost	CHW Mahoost	CHW Mittaphap

Skip

Delete

Print form

Your note here

Add

Clear

Unique System Identifier (EPI)

EPI\_56904656

First Name

Sharon

Surname

tha

Sex

Date of birth

2004-09-01

Mobile phone number

Occupation

Relationships | Add

Relationship

This person has been in contact with

Person ID

Matthew

Notes

Your note here

Add

Clear

STOP - Perform Exercise 3

Register an entity in another program

- Show that TEIs can be registered in more than one program. This allows you to take the attribute information that already exists and re-use it. Additionally, you will now have a historical link of all of the different services that a unique individual has received.

Back

COVID-19 Case-based Surveillance

Enrollment

Selected program [Add new](#)

Enrollment

Enrolling organisation unit

CHW Mittaphap

Case Registration Date

2021-09-12

Profile

Local Case ID

System Generated Case ID

COVID19\_0000035

First Name

Sharon

Surname

tha

Date of birth

2004-09-01

Age

17

Sex

Select or search from the list

Country of Residence

Select or search from the list

Facility contact number

Home Address

First Name (parent or carer)

Surname (parent or carer)

Mobile phone number

Workplace/school physical address

Enroll

Cancel

Register a TEI with no Program

- A TEI can also be registered without selecting a program. De-select the Vaccination program so that the program selection field is blank. Select the person TEI type and click on "Register". Enter the details and Select "Save and continue".

Registration and Data Entry

Select or search from the list Search Register

Register Person

Profile

First Name

Surname

National ID

Date of birth yyyy-MM-dd

Save and continue Save and add new Print form Cancel

- Upon entering the dashboard, you will see that there is a prompt to select a program for enrollment.

Back Select or search from the list

Enrollment

Selected program

Please select a program for enrollment

Other programs

No active enrollments exist

Indicators

No indicators exist

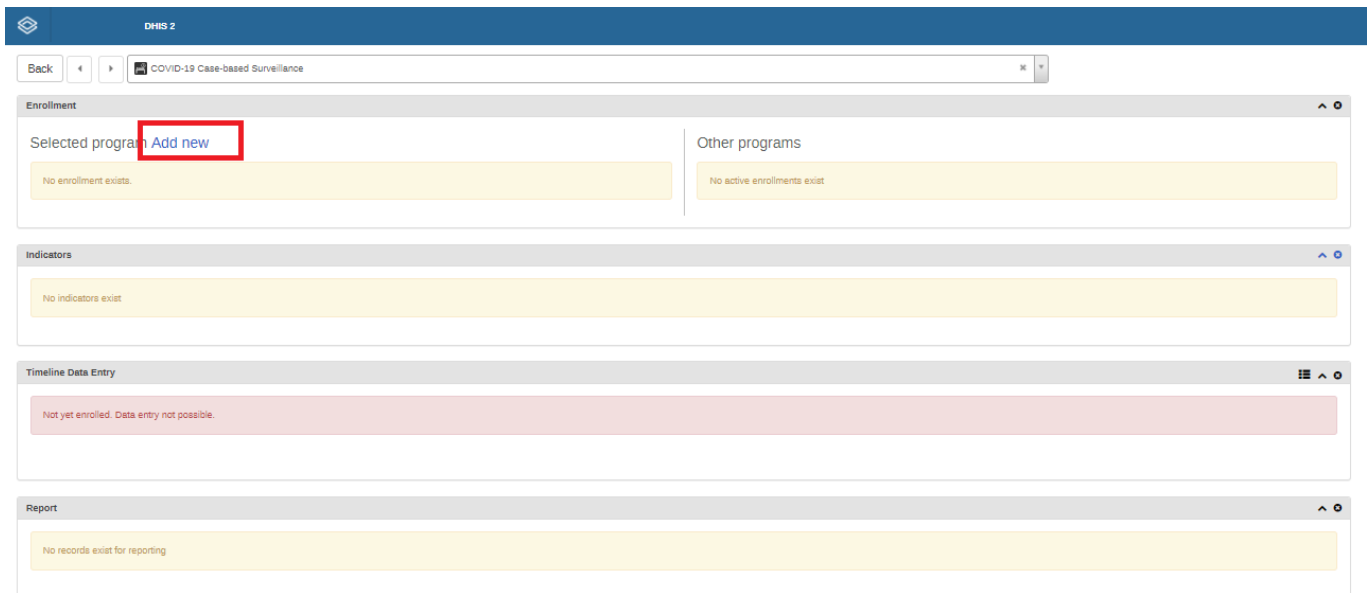
Timeline Data Entry

No active enrollment. Please enroll from the enrollment widget.

Report

No records exist for reporting

- Select the COVID - 19 case based Surveillance and click on "Add new." The attributes for the program will appear. You can fill them out to register the person into the program. Using the program selector, TEI's can be registered in multiple programs directly from the dashboard.



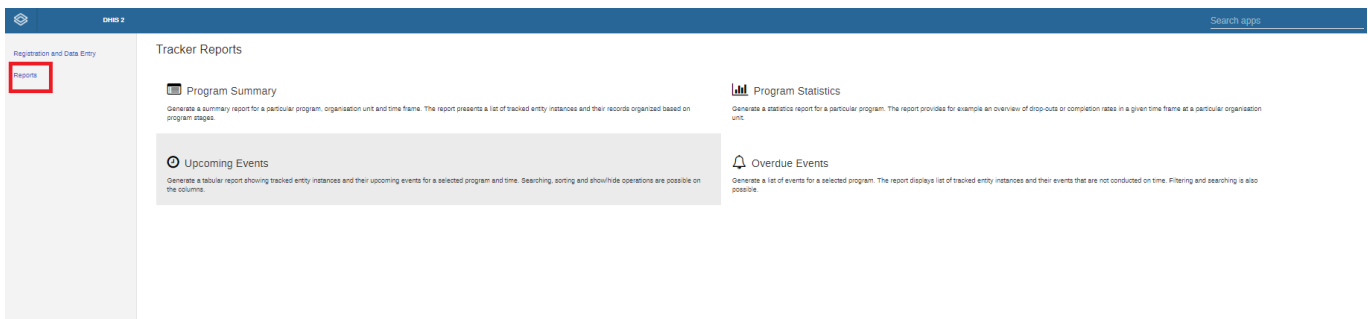
The screenshot shows the DHIS 2 interface for COVID-19 Case-based Surveillance. The top navigation bar is blue with the DHIS 2 logo and a search bar. Below the navigation bar, there are tabs for 'Back', 'COVID-19 Case-based Surveillance', and a dropdown menu. The main content area is divided into four sections: 'Enrollment', 'Indicators', 'Timeline Data Entry', and 'Report'. The 'Enrollment' section is currently active and shows a 'Selected program' field with an 'Add new' button highlighted by a red box. Below this, there are two yellow boxes: 'No enrollment exists.' and 'No active enrollments exist'. The 'Indicators' section shows 'No indicators exist'. The 'Timeline Data Entry' section shows 'Not yet enrolled. Data entry not possible.'. The 'Report' section shows 'No records exist for reporting'.

After you are done, go back to the front page of the tracker capture app.

## STOP - Perform Exercise 4

### Part 5 : Demonstrate Tracker Capture App Reports

Access tracker capture reports by selecting "Reports" from the front page of the tracker capture app.



The screenshot shows the DHIS 2 Tracker Reports interface. The top navigation bar is blue with the DHIS 2 logo and a search bar. Below the navigation bar, there is a sidebar with a 'Reports' button highlighted by a red box. The main content area is titled 'Tracker Reports' and contains three sections: 'Program Summary', 'Program Statistics', and 'Upcoming Events'. The 'Program Summary' section has a description: 'Generate a summary report for a particular program, organisation unit and time frame. The report presents a list of tracked entity instances and their records organized based on program stages.' The 'Program Statistics' section has a description: 'Generate a statistics report for a particular program. The report provides for example an overview of drop-outs or completion rates in a given time frame at a particular organisation unit.' The 'Upcoming Events' section has a description: 'Generate a list of events for a selected program and time. Searching, sorting and show/hide operations are possible on the columns.' The 'Overdue Events' section has a description: 'Generate a list of events for a selected program. The report displays list of tracked entity instances and their events that are not conducted on time. Filtering and searching is also possible.'

There are a number of reports available which are helpful in tracking entities through their programs and making sure they have received the right services, or giving an overview of the program, etc.

## Assignment

After you have completed all demos and they have finished the exercises, have them complete the graded assignment for this session. If you find you are running out of time, assign the graded assignment to them and ask them to complete it outside of the live scheduled session.