1. How to Register or Create a New Client Record in PTracker

Objective:	Ensure that MCH clients have an electronic record in PTracker
Tasks:	Search to confirm that a client does not have an existing record Create a new client record
When:	When a **NEW** client arrives at MCH facility (ANC or Maternity or Post Natal Care)
Who:	MCH staff who receive clients. These users should have logins and data entry roles to create visits.
Required Materials:	Username, Password, Hardware with Firefox Web browser or ODK collect application, Client Name, Client Sex, Client Date of Birth or Age, Address, Phone Number, Client's Mother's First Name, Place of Birth, Next of Kin and Other Contacts.

STEP	ACTION	
1.	Navigate to the **Search Client** screen by clicking on the **Find Client Record** button.	🔍 Find Client Record
2.	From the **Find Client Record** page, enter the client's name into the search box. 🏠 › **Find Client Record** **Find Client Record** Search by ID or Name Register a Patient Register a patient	

2.

From the **Find Client Record** page, enter the client's name into the search box.

🏠 › **Find Client Record**

Find Client Record

Search by ID or Name

Register a Patient   Register a patient

*For example, if a new client's name recorded in the register as or client gives her name as **Ndapewa Shilonga.** <u>First</u> search for the clients name by a part of the provided name. Entering "Nda" in the Search box returns a list of all records for clients whose names contain with "Nda".*

🏠 › **Find Client Record**

Find Client Record

nda

Identifier	Name	Gender	Age	Birthdate	Telephone Number
10CXED	Anna Ndapewa shikalepo	F	1 Month(s)	04 Apr 2018	0816890234
10CYCG	Ndamona onghenda Mercy	F	39	21 Apr 1979	0812348765
10CYMV	ndapewa ndapewa ndapewa	F	25	05 Mar 1993	0816639110

Showing 1 to 3 of 3 entries   First Previous 1 Next Last

Register a Patient   Register a patient

💡 **Tip:** As you enter letters into the search box, the list of clients will automatically update to match your entered search term.

Avoid creating duplicate client records!

Before creating a new client record, **<u>FIRST</u>** confirm that the client does not have an existing record in PTracker by searching for the client's name or previously used PTracker ID

STEP	ACTION	
	If	**Then**
	None of the retrieved client records matches the client searched for	Continue to **Step 4** to create a new client record
3.	One or more PTracker client record(s) matches the client	Double-check the client's age, demographic information, and/or PTracker Identifier to be sure you have the correct record. You can click on the client highlighted row by moving the mouse over it to see a client's full record if needed.

3.

Find Client Record

nda

Identifier	Name	Gender	Age	Birthdate	Telephone Number
10CXED Record	Anna Ndapewa shikalepo	F	1 Month(s)	04 Apr 2018	0816890234

🏠 › **Anna Ndapewa shikalepo**

Anna Ndapewa shikalepo Female 1 month(s) (04.Apr.2018) Edit ✏ Show Contact Info ▼   PTracker ID 10309A1800021
Given   *Middle*   *Family Name*

👤 **DEMOGRAPHICS** ✏

Given	Anna
Middle	Ndapewa
Family Name	shikalepo
Gender:	Female
Birthdate	04.Apr.2018

👥 **Recent Visits**
09.Apr.2018 — Infant Postnatal

👥 **FAMILY**
10CXDF - Celia Naggy Shikalepo — Parent

General Actions
📷 Infant - Postnatal Form

4.

At bottom of the page, click the [Register a patient] out to navigate to the **Register a Patient** screen. The following page below will appear.

🏠 › **Register a patient**

Register a patient

Demographics
  Name
  Gender
  Birthdate
PTracker ID
  PTracker ID
Contact Info
  Address
  Phone Number
Other Demographics
  Name of Next of Kin
  Next of Kin Contact No
Confirm

What's the patient's name?

Given (required)   **Middle**   **Family Name** (required)

STEP	ACTION
5.	Enter the client's **Given, Middle** and **Family Name** in the first three fields.
	Note: The **Given** and the **Family Names** *must* be filled for you to successfully save this client's record in PTracker. As you enter demographic details of client being registered, PTracker system automatically filters existing clients with similar demographic details for you to review. In this example the DOB entered for **Ndapewa Shilonga** is **05 March 1993**. The System returns the following screen for review by the user.
6.	Click on the [Review patient(s)] button to review a quick summary of all similar patients shown during new client registration.
	Use the [Open] button to review detailed records.
	Please review ALL similar patients to ensure that it is **NOT** same person being re-registered and to avoid creating duplicate records within the system.
7.	Select the **Gender** of the client being registered (Male or Female). Record the **Birthdate** by keying in the **day** on the date field, use the dropdown menu to select the **month** and type in the **year**. If the Date of Birth is not known enter the estimated **years** and **month** below the **Birthdate** field.
8.	Enter the **PTracker ID.** **See Section on How To Generate a PTracker ID** **Note: The PTracker ID contains:** 1. First the Five Digit Facility code, then: 2. A one letter alpha marker, then: 3. Year of the register, then: 4. The Serial Number
	Remember to write the PTracker ID in the Register AND in Pink Book ANC

STEP	ACTION
9.	Next fill in the client address. Select from the drop down menu the current country of residence for **Country** Field. Select the district from the drop down and then type in the **Location** and **Address** provided for the client. Register a patient **Demographics** ✓ Name ✓ Gender ✓ Birthdate **PTracker ID** ✓ PTracker ID **Contact Info** Address Phone Number **Other Demographics** Name of Next of Kin Next of Kin Contact No **Confirm** Country: Namibia District: Windhoek District Location: Katatura Address: Erf # 2458 Goreangab dam
10.	Enter the client phone number in the **Contact Phone Number** field. **Demographics** ✓ Name ✓ Gender ✓ Birthdate **PTracker ID** ✓ PTracker ID **Contact Info** ✓ Address ✓ Phone Number Contact Phone number: 0812239478
	Hint: The phone number must **exactly** be a 10 numeric digit. Entering more than 10 digits or less than 10 digits will prompt an invalid error in the system Contact Phone number: 08122309478 — Invalid.
11.	Enter **Name of Next Kin** and **Next of Kin Contact No** Name of Next of Kin: Erasmus Shilongo Next of Kin Contact No: 0816668890
12.	Select confirm by clicking on the **Confirm** button. The summary page will display all the entered details of the New Client being registered. Throughly review *every* detail on the summary page before confirming. ✓ Next of Kin Contact No **Confirm**
	If you are ready to create a new client record, click **Confirm** button. (*This will save and submit all the information you entered for the client*). Confirm

STEP	ACTION
12.	**Demographics** ✅ Name ✅ Gender ✅ Birthdate **PTracker ID** ✅ PTracker ID **Contact Info** ✅ Address ✅ Phone Number **Other Demographics** ✅ Name of Next of Kin ✅ Next of Kin Contact No **Confirm** **Name:** Ndapewa, Faithful, Shilonga **Gender:** Female **Birthdate:** 05, March, 1992 **PTracker ID:** 10137A180980 **Address:** Namibia, Windhoek District, Katatura, Erf # 2458 Goreangab dam **Phone Number:** 0812239478 **Name of Next of Kin:** Erasmus Shilongo **Next of Kin Contact No:** 0816668890 Confirm submission? **Cancel** **Confirm**
	If you are not ready to create a new client record, click the red **Cancel** button. This action will delete all the information you entered, and return you to the new registration screen)
	It is possible to edit client details **_before_** selecting confirm. Select any item on the left for editing. On satisfaction, select **Confirm** to get back to the summary page and click the **confirm submission** button
13.	The client registration task is complete **_after_** clicking the green **Confirm** button to confirm the client's details entered at the time of registeration . Once the page is submitted the summary page displays all **Client's Details** entered. See the below display. 🏠 > **Ndapewa Faithful Shilonga** **Ndapewa Faithful Shilonga** Female 26 year(s) (05.Mar.1992) Edit ✏ Show Contact Info ▼ *Given Middle Family Name* PTracker ID 10137A180980 👤 **DEMOGRAPHICS** ✏ Given Ndapewa Middle Faithful Family Name Shilonga Gender: Female Birthdate 05.Mar.1992 👤 **CONTACT INFO** ✏ Address Namibia Windhoek District Katatura Erf # 2458 Goreangab dam Phone Number 0812239478 👤 **OTHER DEMOGRAPHICS** ✏ Name of Next of Kin Erasmus Shilongo Next of Kin Contact No 0816668890 👥 **Recent Visits** None 👥 **FAMILY** None ⚕ **ALLERGIES** ✏ Unknown **General Actions** 📷 Antenatal Form 📷 Labour and Delivery Form 📷 Mother - Postnatal Form