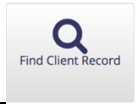
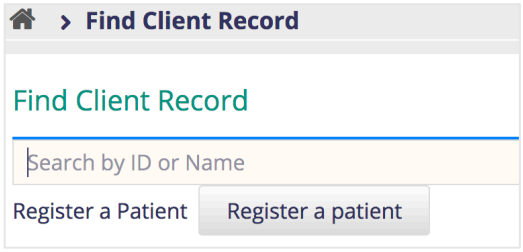
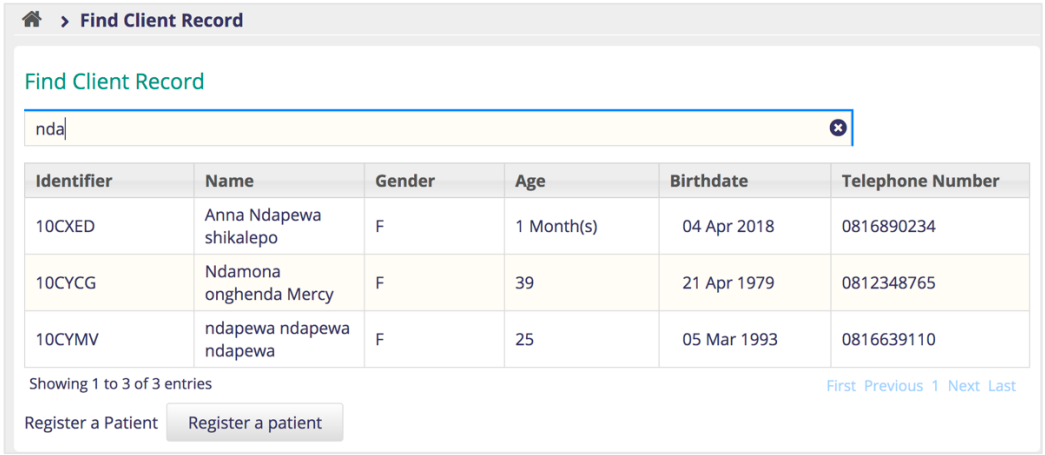
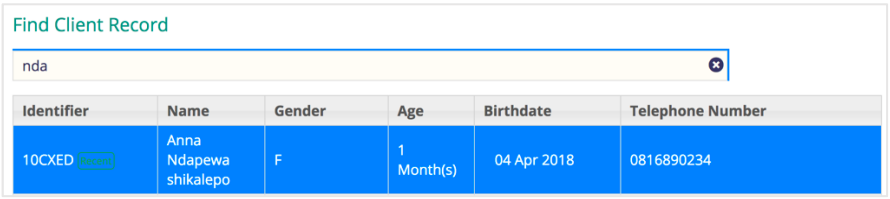
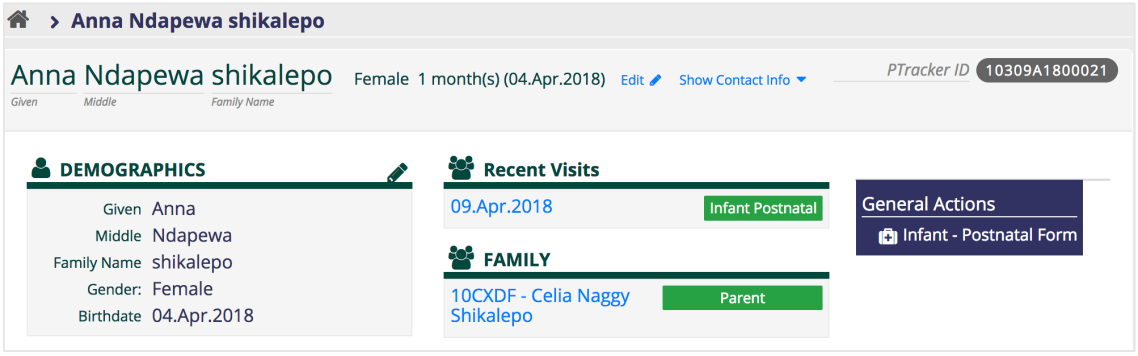
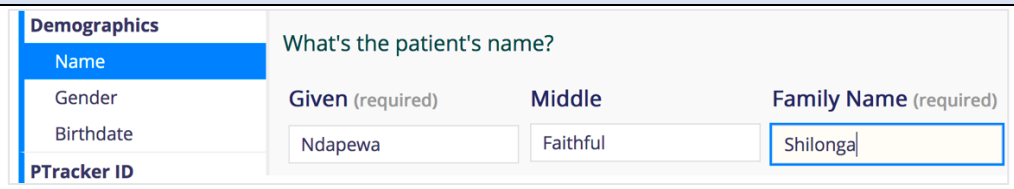
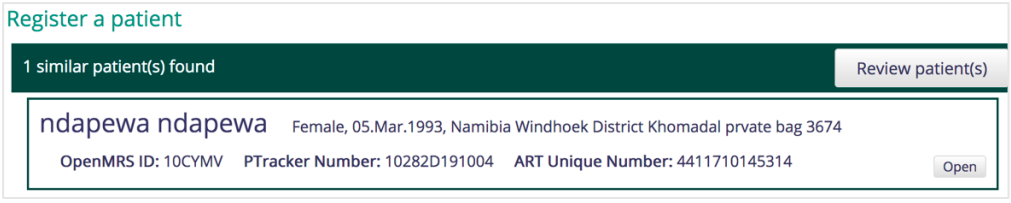
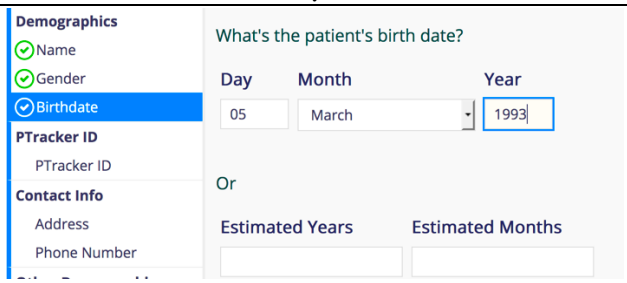
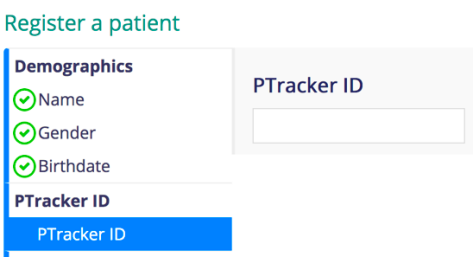
1. How to Register or Create a New Client Record in PTracker

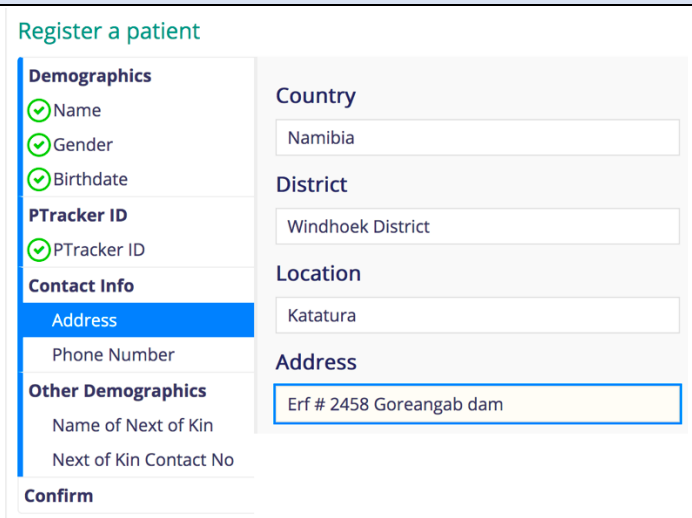
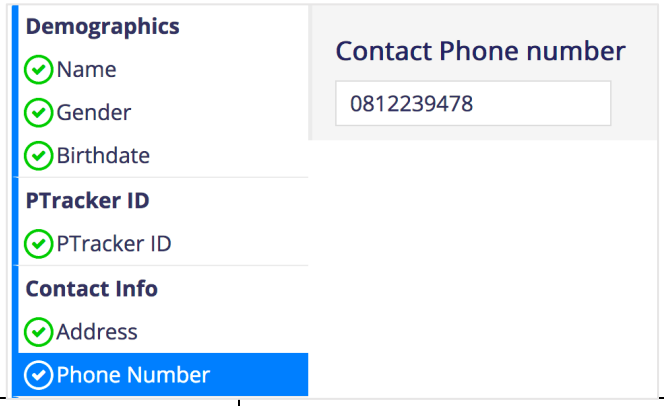
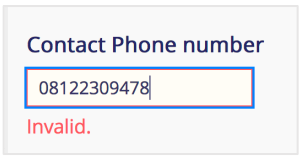
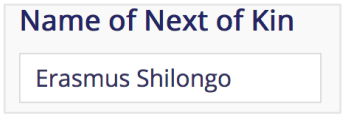
Objective:	Ensure that MCH clients have an electronic record in PTracker
Tasks:	Search to confirm that a client does not have an existing record Create a new client record
When:	When a **NEW** client arrives at MCH facility (ANC or Maternity or Post Natal Care)
Who:	MCH staff who receive clients. These 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.

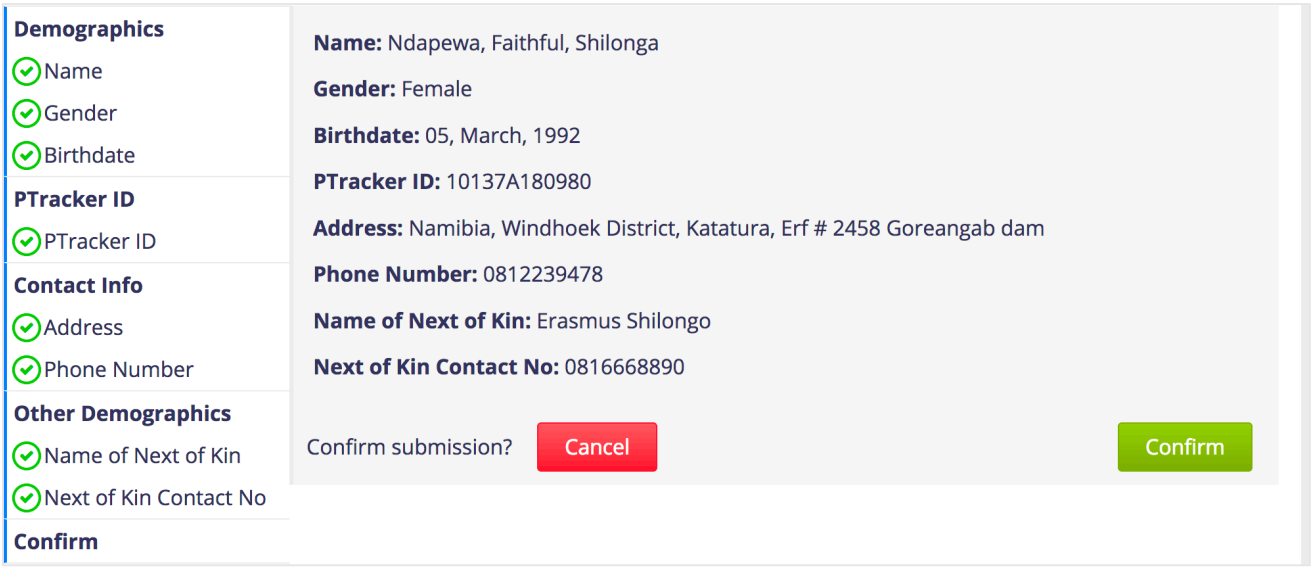
STEP	ACTION
1.	Navigate to the **Search Client** screen by clicking on the **Find Client Record** button. 
2.	From the **Find Client Record** page, enter the client's name into the search box. 
	*For example, if a new client's name recorded in the register as or client gives her name as **Ndapewa Shilonga.** First 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".*
	
	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, **FIRST** confirm that the client does not have an existing record in PTracker by searching for the client's name or previously used PTracker ID

<table>
<tr><th>STEP</th><th colspan="2">ACTION</th></tr>
<tr><td rowspan="4">3.</td><td>If</td><td>Then</td></tr>
<tr><td>None of the retrieved client records matches the client searched for</td><td>Continue to <u>Step 4</u> to create a new client record</td></tr>
<tr><td>One or more PTracker client record(s) matches the client</td><td>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.</td></tr>
<tr><td colspan="2"> 


</td></tr>
<tr><td>4.</td><td colspan="2">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.</td></tr>
<tr><td colspan="2">
</td></tr>
</table>

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.	
10.	Enter the client phone number in the **Contact Phone Number** field.	
	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	
11.	Enter **Name of Next Kin** and **Next of Kin Contact No**	
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.	
	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*).	

STEP	ACTION
12.	
	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.