

# DH Field EMR

Setup Guide for Organization Administrators

## Overview

This guide walks you through setting up DH Field EMR for your organization. The app is designed for medical outreach in resource-limited settings and runs on macOS (Apple Silicon). It can work entirely offline or sync data across multiple computers using a free Supabase cloud database.

There are three ways to set up the app:

Setup Mode	Best For	Requires Internet?
<b>New Organization</b>	First computer in your org. Sets up cloud sync from scratch.	Yes (for setup + syncing)
<b>Join Existing Setup</b>	Adding another computer to an org that's already set up.	Yes (for setup + syncing)
<b>Standalone (Offline Only)</b>	Single computer, no internet available or needed.	No

**Recommendation:** If you plan to use more than one computer, choose **New Organization** for your first device. This enables cloud sync so all your computers share the same patient records.

## Step 1: Choose Your Path

Read the section below that matches your situation, then follow the steps in order.

- **Cloud Sync (multi-device)** — Continue to Step 2 below to create a Supabase account, then follow Steps 3 through 6.
- **Standalone (single computer, no internet)** — Skip ahead to **Step 4: Install the App**, then see the **Standalone Setup** section.

## Step 2: Create a Supabase Account (Cloud Sync Only)

Supabase is a free cloud database service. DH Field EMR uses it to store and sync patient records across your computers.

### 2.1 — SIGN UP

Go to **supabase.com** in your web browser and create a free account. You can sign up with your email or with a GitHub account.

### 2.2 — CREATE A NEW PROJECT

1. Once logged in, click "**New Project**"
2. Choose your organization (or create one if prompted)
3. Enter a project name (e.g., "DH EMR" or your organization's name)
4. Set a **database password** — save this somewhere safe, you may need it later
5. Select the **region** closest to where you'll be working (e.g., if you're in East Africa, choose the nearest available region)
6. Click "**Create new project**"

Wait 1-2 minutes for the project to finish setting up. You'll see a "Project is ready" message when it's done.

## Step 3: Find Your API Credentials

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You need two values from Supabase: the **Project URL** and the **anon API key**. Follow these steps carefully.

### 3.1 — OPEN API SETTINGS

1. In the Supabase dashboard, look at the **left sidebar**
2. Click the **gear icon** (Settings) near the bottom of the sidebar
3. Under the "Configuration" section, click "**Data API**"

### 3.2 — COPY THE PROJECT URL

At the top of the Data API page, you'll see "**Project URL**". It looks like:

```
https://abcdefg.supabase.co
```

Copy this entire URL and save it. You'll paste it into the app shortly.

### 3.3 — COPY THE ANON KEY (READ CAREFULLY)

Below the Project URL, you'll see a section called "**Project API keys**". This is where people commonly get stuck.

By default, Supabase may show you newer-style keys labeled "**Publishable**" and "**Secret**". The EMR needs the **legacy-format** key instead.

1. Look for a link or toggle that says "**Legacy anon, service\_role API keys**" — click it
2. This reveals the legacy keys. Find the one labeled **anon**
3. Copy the **anon** key — it's a long string that starts with `eyJ`

**Important — Legacy Keys:** The newer "Publishable" key format does not work with DH Field EMR. You must use the legacy `eyJ...` key. If you don't see the legacy toggle, check the Supabase API settings page carefully — it may be a small link below the main key display.

**Security:** You'll also see a **service\_role** key on the same page. **Never share the service\_role key** with anyone. The EMR only uses the **anon** key.

**Save both values** (Project URL and anon key) somewhere you can access them easily — you'll need them for every computer you set up, and they don't change.

## Step 4: Install the App

### 4.1 — DOWNLOAD

Download **DH Field EMR.dmg** from [damicohealth.org](https://damicohealth.org).

### 4.2 — INSTALL

1. Open the downloaded `.dmg` file
2. Drag **DH Field EMR** into your **Applications** folder
3. Open the app from your Applications folder

### 4.3 — MACOS SECURITY PROMPT

Because the app is not signed through the Apple Developer Program, macOS will block it the first time you open it. Here's how to allow it:

1. When you see the "app can't be opened" message, close the dialog
2. Open **System Settings** (Apple menu at top-left of screen)
3. Go to **Privacy & Security**
4. Scroll down until you see a message about DH Field EMR being blocked
5. Click "**Open Anyway**"
6. You may be asked to enter your Mac password — do so, then click OK

**If the app says "damaged":** Open the **Terminal** app (find it in Applications > Utilities) and type the following command, then press Enter:

```
xattr -cr /Applications/DH\ Field\ EMR.app
```

Then try opening the app again.

## Step 5: Run the Setup Wizard (New Organization)

When you first launch the app, the Setup Wizard appears automatically. If you're setting up cloud sync for the first time, choose "**New Organization**".

### 5.1 — CHOOSE "NEW ORGANIZATION"

You'll see three buttons on the welcome screen:

- **New Organization** — Choose this. It sets up your cloud database from scratch.
- Join Existing Setup — For adding computers later (see Step 7).
- Standalone (Offline Only) — For single-computer use without cloud (see Step 8).

Click "**New Organization**".

## 5.2 — ENTER CREDENTIALS

The wizard shows fields for your Supabase URL and anon key.

1. Paste the **Supabase URL** from Step 3.2
2. Paste the **anon key** from Step 3.3
3. Click "**Test Connection**"

You should see a green checkmark confirming the connection works. If it fails, double-check that you copied the full URL and the correct (legacy) key.

## 5.3 — CREATE DATABASE TABLES

The wizard shows a block of SQL code that creates the tables the EMR needs.

1. Click "**Copy SQL to Clipboard**" in the app
2. Go back to your Supabase dashboard in the browser
3. Click "**SQL Editor**" in the left sidebar
4. Click "**New query**"
5. Paste the SQL (Cmd+V) into the editor
6. Click "**Run**"
7. You should see "Success. No rows returned" — that's correct

Go back to the app and click "**I've Run the SQL**".

## 5.4 — VERIFY TABLES

Click "**Verify Tables**". The wizard checks that the `records`, `devices`, and `config` tables were created successfully. You'll see green checkmarks next to each table name.

## 5.5 — SEED DEFAULT CONFIGURATION

Click "**Seed Config**". This uploads the default configuration to your cloud database, including:

- Medication formulary
- Clinic sites
- Physician/provider list
- Procedures
- Referral types
- Diagnosis presets
- Rx (prescription) presets
- Chief complaints
- Lab tests

All of these can be customized later from within the app.

## 5.6 — SET ADMIN PASSWORD

Choose a password for the **admin role**. This password controls which device can edit the organization's configuration (formulary, sites, providers, etc.).

- The first device you set up becomes the **Admin** device
- Additional devices joining later will be **Standard** (read-only for configuration)
- Any device can claim admin access by entering this password

**Remember this password!** You'll need it if you want to transfer admin control to a different computer. There is no password recovery — if you forget it, you'll need to reset it through the database.

## 5.7 — NAME YOUR DEVICE

Enter a descriptive name for this computer, such as "Clinic Laptop 1" or "Dr. Smith MacBook". This name helps identify which device created which records.

## 5.8 — DONE!

Click "**Launch App**". Your first computer is now set up and ready to create patient encounters.

## Step 6: First Sync

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After setup, you'll see a **sync indicator** in the top-right area of the app. Syncing is **manual** — it does not happen automatically in the background.

### HOW TO SYNC

1. Go to the **Admin** tab (the lock icon in the top navigation bar)
2. Under "Cloud Connection", click the **"Sync Now"** button
3. The sync indicator will show "Syncing..." while it works
4. When finished, it shows "Connected" with the time of the last sync

**Tip:** Get in the habit of clicking "Sync Now" at the start and end of each clinic day, and whenever you have internet access. This ensures your records are backed up to the cloud and shared with other devices.

## Step 7: Setting Up Additional Computers

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To add more computers to your organization, repeat the install process but choose a different wizard option.

### 7.1 — INSTALL THE APP

Follow Step 4 above to download, install, and authorize the app on the new computer.

### 7.2 — CHOOSE "JOIN EXISTING SETUP"

When the Setup Wizard appears, click **"Join Existing Setup"** instead of "New Organization".

### 7.3 — ENTER CREDENTIALS

Enter the **same Supabase URL and anon key** that you used on your first computer. Click "Test Connection" to verify.

### 7.4 — REGISTER THE DEVICE

Enter a **unique name** for this computer (e.g., "Clinic Laptop 2", "Triage Station"). Click "Register Device".

## 7.5 — DONE

This device is now connected to your organization. Click "Sync Now" in the Admin tab to download existing records and configuration from the cloud.

**Note:** Additional devices join as **Standard** role by default. They can view and create patient records, but cannot edit the organization's configuration (formulary, sites, providers, etc.). To give a device admin access, go to the Admin tab and enter the admin password. See the Admin Guide for details.

## Step 8: Standalone Setup (Offline Only)

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If you only have one computer and don't need cloud sync, choose the standalone option.

### 8.1 — INSTALL THE APP

Follow Step 4 above to download, install, and authorize the app.

### 8.2 — CHOOSE "STANDALONE (OFFLINE ONLY)"

When the Setup Wizard appears, click "**Standalone (Offline Only)**".

### 8.3 — NAME YOUR DEVICE

Enter a name for this computer and click the button to continue.

### 8.4 — DONE

That's it. The app is ready to use. All data is stored locally on this computer. The sync indicator will be hidden since there is no cloud connection.

**Upgrading later:** If you later decide you want cloud sync, go to the **Admin** tab in the app and click "**Connect to Cloud**". You can enter your Supabase credentials there to enable syncing without reinstalling.

## Troubleshooting

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### App Won't Open on macOS

Go to **System Settings > Privacy & Security**. Scroll down to find the blocked app message and click "**Open Anyway**". If the app says "damaged", open Terminal and run:

```
xattr -cr /Applications/DH\ Field\ EMR.app
```

## Connection Failed During Setup

Double-check your Supabase URL and anon key:

- The URL should start with `https://` and end with `.supabase.co`
- The key should start with `eyJ` — make sure you're using the **legacy** key, not the newer "Publishable" key
- Make sure there are no extra spaces before or after the values when you paste them
- Verify you have an active internet connection

## Tables Not Verified

Make sure you ran the full SQL block in the Supabase SQL Editor. If you see error messages, try running it again. If you see "relation already exists" warnings, that's fine — the tables were already created from a previous attempt.

## "Legacy API Keys" Not Visible

In the Supabase dashboard, go to **Settings > Data API**. Look carefully below the "Project API keys" section for a small link or toggle labeled "Legacy anon, service\_role API keys." Click it to reveal the legacy keys. The anon key starting with `eyJ` is the one you need.

## Sync Not Working After Setup

Remember that sync is **manual**. Go to the Admin tab and click "Sync Now". If it shows an error:

- Check your internet connection
- Verify your Supabase project is still active (log into supabase.com)
- Go to Admin tab > Cloud Connection > "Edit Connection Settings" to re-enter your credentials

## Second Computer Can't Connect

Make sure you're using the exact same Supabase URL and anon key as the first computer. Do **not** create a new Supabase project for each computer — all devices in an organization share one project.

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DH Field EMR — Damico Health Inc.

For support, contact your organization administrator or visit [damicohealth.org](http://damicohealth.org).