DH Field EMR

Administrator Guide — Configuration & Device Management

Overview

This guide is for organization administrators who manage the DH Field EMR configuration. As an admin, you control the formulary, clinic sites, providers, diagnosis presets, prescription presets, lab tests, and other settings that all devices in your organization share.

Configuration is managed from two places in the app:

- **Options tab** — Where you edit the formulary, sites, providers, presets, complaints, referral types, diagnoses, and lab tests.
- **Admin tab** — Where you manage device roles, database backup, cloud connection, and admin password.

Admin vs. Standard Device Roles

Every device in your organization has one of two roles:

Role	Can Create/Edit Patient Records	Can Edit Configuration
Admin	Yes	Yes — can edit formulary, sites, providers, presets, lab tests, etc.
Standard	Yes	No — configuration is read-only. Changes sync from the Admin device.

Key points about the role system:

- The **first device** set up with "New Organization" automatically becomes the Admin.
- Devices that join later using "Join Existing Setup" are Standard by default.
- Only **one device at a time** can be the Admin.
- Standard devices see a lock banner on the Options tab explaining that configuration is managed by the Admin device.
- All devices (Admin and Standard) can create, edit, and view patient records.

Claiming Admin Access on Another Device

If you need to move admin control to a different computer (e.g., the original admin laptop isn't available):

1. On the new device, go to the **Admin** tab (lock icon in the top navigation)
2. Under "Admin Access", you'll see an **"Admin Password"** field
3. Enter the admin password that was set during initial setup
4. Click **"Claim Admin Access"**
5. This device is now the Admin. The previous admin device will become Standard on its next sync.

Releasing Admin Access

If you're on the Admin device and want to release the role:

1. Go to the **Admin** tab
2. Under "Admin Access", click **"Release Admin Role"**
3. This device becomes Standard. Another device can then claim admin.

Changing the Admin Password

On the Admin device:

1. Go to the **Admin** tab
2. Click **"Change Admin Password"**
3. Enter and confirm the new password (minimum 4 characters)
4. Click **"Save New Password"**

> **Important:** There is no password recovery. If you forget the admin password, you'll need to reset it directly in the Supabase database. Keep the password somewhere safe.

The Options Tab — Configuration Overview

The **Options** tab is where all clinical configuration lives. Only Admin devices can make changes here. The sections are displayed in a single scrollable page:

Section	What It Controls
Medication Formulary	All medications available for prescribing
Sites / Communities	Clinic locations shown in the Site dropdown
Rx Presets	Pre-built prescription regimens for common conditions

Procedures	Procedure options on the Clinical tab
Physicians	Provider names shown on the Clinical tab
Chief Complaints	Quick-select complaint buttons on the Triage tab
Referral Types	Referral options on the Clinical tab
Diagnosis Presets	Quick-select diagnoses on the Dx Presets tab
Lab Tests	Point-of-care tests shown on the Labs tab

When you edit configuration on the Admin device and sync, the changes are pushed to the cloud. Other devices receive the updated configuration on their next sync.

Customizing the Formulary

The formulary is the master list of all medications available in the app. It's displayed as a table at the top of the Options tab.

Adding a Medication

1. Click **"+ Add Medication"** above the formulary table
2. A modal window appears with fields for:
   - **Name** — The medication name and strength (e.g., "Amoxicillin 500mg")
   - **Default Dose** — The standard dosing (e.g., "1 tab PO TID x 7 days")
   - **Category** — The drug class (e.g., Antibiotics, Antimalarials, Analgesics)
   - **Controlled** — Check this box if the medication requires special documentation
3. Click **"Save"**

Editing a Medication

Click the **edit** button (pencil icon) in the Actions column next to any medication. The same modal opens with the current values pre-filled. Make your changes and click "Save".

Removing a Medication

Click the **delete** button (X icon) in the Actions column. The medication will be removed from the formulary.

> **Tip:** You don't need to delete medications you're temporarily out of stock on. Instead, use the show/hide toggle (see below) to hide them from the encounter form without removing them from the system.

Show/Hide Toggles (Eye Icon)

Most configuration sections have a **visibility toggle** — a small eye icon next to each item. This is one of the most useful admin features.

> **HOW IT WORKS**
>
> - **Visible (eye open)** — The item appears on encounter forms for all users.
> - **Hidden (eye with line through it, grayed out)** — The item is hidden from encounter forms but remains in the system. It can be re-enabled at any time.

The eye toggle is available on these sections:

- **Procedures** — Hide procedures your organization doesn't perform.
- **Diagnosis Presets** — Hide diagnoses that aren't relevant to your clinical setting.
- **Chief Complaints** — Hide complaint buttons that aren't commonly used.
- **Referral Types** — Hide referral types you don't use (except "None", which is always visible).
- **Lab Tests** — Hide lab tests you don't have supplies for.

To toggle visibility, simply click the **eye icon** next to the item. The change takes effect immediately on this device and will sync to other devices when you click "Sync Now".

> **Example:** If your organization doesn't perform RPR/Syphilis testing, go to Options > Lab Tests and click the eye icon next to "RPR/Syphilis" to hide it. Clinicians won't see it on the Labs tab, keeping the form cleaner. If you later get RPR supplies, click the eye again to re-enable it.

Managing Sites

Sites are the clinic locations where your team operates. They appear in the "Site" dropdown on every encounter.

> **ADDING A SITE**
>
> 1. Scroll to the **"Sites / Communities"** section on the Options tab
> 2. Click **"+ Add Site"**
> 3. Enter the site name (e.g., "Kiwoko Health Center", "Nakaseke Outreach")
> 4. Click Save or press Enter

REMOVING A SITE

Click the **X** button next to the site name. Existing records that used this site will keep their original site value.

Managing Providers (Physicians)

Providers are the clinicians who see patients. They appear as selectable buttons on the Clinical tab.

ADDING A PROVIDER

1. Scroll to the **"Physicians"** section on the Options tab
2. Click **"+ Add Physician"**
3. Enter the provider's name
4. Click Save or press Enter

REMOVING A PROVIDER

Click the **X** button next to the provider name.

Managing Procedures

Procedures appear as selectable buttons on the Clinical tab (e.g., I&D, Wound Closure, Joint Injection, Circumcision).

- Click **"+ Add Procedure"** to add a new procedure
- Click the **X** button to remove a procedure
- Click the **eye icon** to show/hide a procedure without deleting it

Managing Chief Complaints

Chief complaints appear as quick-select buttons on the Triage tab. Clinicians tap these to quickly document the patient's presenting concern.

- Click **"+ Add Complaint"** to add a new chief complaint
- Click the **X** button to remove one

- Click the **eye icon** to show/hide a complaint without deleting it

> **Tip:** Keep the complaint list focused. If you have dozens of rarely-used complaints, hide the uncommon ones with the eye toggle. Clinicians can always type custom complaints in the text field.

Managing Referral Types

Referral types appear as selectable buttons on the Clinical tab. Default types include: None, Surgery, Follow-up, Specialist, Hospital, Lab Work.

- Click **"+ Add Referral Type"** to add a new type
- Click the **X** button to remove one
- Click the **eye icon** to show/hide a referral type

> **Important:** Do not remove **"None"** from the referral types. It's the default value for patients who don't need a referral.

Managing Diagnosis Presets

Diagnosis presets appear on the Dx Presets tab in the encounter panel. They allow clinicians to quickly select common diagnoses rather than typing them out.

- Click **"+ Add Diagnosis"** to add a new preset
- Click the **X** button to remove one
- Click the **eye icon** to show/hide a diagnosis preset

Diagnoses can be sorted three ways by clinicians: Most Used, A-Z, and By System. When adding a diagnosis, consider which body system category it falls into, as this affects the "By System" sort.

Managing Rx Presets

Rx (prescription) presets are pre-built medication regimens for common conditions. Each preset includes one or more medications with dosing, frequency, and duration. Clinicians tap a preset to auto-fill the medications on the Clinical tab.

ADDING AN RX PRESET

1. Scroll to the **"Rx Presets"** section on the Options tab
2. Click **"+ Add Rx Preset"**
3. Enter the preset name (e.g., "Malaria Treatment — Adult", "UTI Treatment")
4. Add the medications that make up this regimen, including dose, frequency, and duration for each
5. Click Save

EDITING AN RX PRESET

Click the edit button next to any preset to modify its medications or name.

REMOVING AN RX PRESET

Click the **X** button next to the preset name.

Tip: Rx presets are weight-aware. You can create different presets for different weight ranges (e.g., "Malaria — Pediatric <15kg" vs. "Malaria — Adult"). The app shows presets appropriate to the patient's selected weight range.

Configuring Lab Tests

Lab tests appear on the Labs tab in the encounter panel. The app comes with default tests, and you can add custom tests or hide tests you don't need.

Default Lab Tests

The app ships with common point-of-care tests including: Malaria RDT, HIV, Pregnancy (HCG), Typhoid, RPR/Syphilis, H. pylori, Hepatitis B, Blood Glucose, Hemoglobin, and others.

Lab Test Types

There are two types of lab tests:

Type	How It Works	Example
Toggle	Simple POS/NEG buttons	Malaria RDT, HIV, Pregnancy
Numeric	Enter a number; app shows interpretation (Normal/Low/High)	Blood Glucose (mg/dL), Hemoglobin (g/dL)

Showing/Hiding Lab Tests

Click the **eye icon** next to any lab test to hide or show it. Hidden tests won't appear on the Labs tab for clinicians, but the test definition stays in the system.

Adding a Custom Lab Test

1. Scroll to the **"Lab Tests"** section on the Options tab
2. Click **"+ Add Lab Test"**
3. Enter the test name
4. Choose the test type (Toggle or Numeric)
5. For numeric tests, optionally set the unit (e.g., "mg/dL") and reference ranges for interpretation
6. Click Save

Removing a Lab Test

Click the **X** button next to the test. Existing records that used this test will keep their stored results.

> **Example:** If your team starts doing on-site Hemoglobin A1c testing, add a new numeric lab test called "HbA1c" with the unit "%" and appropriate reference ranges. It will immediately appear on the Labs tab for all users (after syncing).

Database Backup

Backing up your data is critical, especially before and after outreach events. The app supports USB backup to an external drive.

Setting Up USB Backup

1. Go to the **Admin** tab
2. Under "Database Backup", click **"Select Backup Location"**
3. Choose a folder — ideally on an external USB drive or a dedicated backup folder
4. The selected path is shown next to "Backup Path"

Running a Backup

1. Click **"Backup Now"** (this button is only enabled after you've selected a backup location)
2. The app copies the entire database to your selected location
3. The "Last Backup" timestamp updates when the backup completes

Auto-Backup

Check the **"Auto-backup every 2 hours"** checkbox to enable automatic backups. The app will save a backup to your selected location every 2 hours while it's running. Auto-backup requires a backup location to be set first.

Quick Backup (Keyboard Shortcut)

Press `Cmd+B` from anywhere in the app to save a JSON backup of all records to your Desktop. This is a quick way to create a backup without configuring a backup path. To restore from a JSON backup, press `Cmd+Shift+R` and select the backup file.

> **Best Practice:** Set up USB backup to an external drive and enable auto-backup. Also do a manual `Cmd+B` backup before and after major outreach events. Store backup drives in a separate location from the computers.

Analytics and Reporting

The **Analytics** screen provides comprehensive data visualization. It's accessible from the top navigation bar on any device (not just the Admin device).

Analytics Dashboard Sections

Section	What It Shows
Summary Cards	Total encounters, unique patients, female %, lab positives, referrals, pregnant patients, meds dispensed
Disease Burden	Horizontal bar chart of diagnosis categories
Top Diagnoses	Table of the most common individual diagnoses with counts
Patients by Site	Donut chart showing distribution across clinic sites
Sex Distribution	Donut chart of male vs. female
Patients by Camp Day	Bar chart of daily encounter volume
Age Distribution	Bar chart of patient ages
Lab Positivity	Table showing positive rates for each rapid test
Physician Encounters	Bar chart of encounters per provider
Procedures	Bar chart of procedures performed
Referrals by Type	Chart of referral categories

Medication Usage	Top 15 most prescribed medications
Medication Dispensing	Total tablets/capsules dispensed by medication
Provider Productivity	Detailed table and chart of encounters per provider
Data Quality Dashboard	Highlights records with missing or incomplete data

Filtering Analytics

Use the filter bar at the top of the Analytics screen to narrow the data:

- **From / To dates** — Limit to a specific date range
- **Site** — Show data from a single clinic site
- **Sex** — Filter by male or female
- Click **"Reset"** to clear all filters

Donor Report PDF

Click **"Generate Donor Report"** on the Analytics screen to produce a formatted PDF summary. Set your date and site filters first to scope the report to the period and location you want to present. The report includes key statistics and is suitable for sharing with donors, partners, or stakeholders.

Data Quality Dashboard

Scroll to the bottom of the Analytics screen to find the **Data Quality Dashboard**. This section identifies records that may have issues, such as:

- Missing vitals (temperature, blood pressure, weight)
- Missing diagnosis or provider
- Incomplete demographics

Use this dashboard regularly to identify and fix data quality issues before exporting or generating reports.

Cloud Connection Management

The Admin tab shows the current cloud connection status and provides controls for managing it.

Sync Now

Click the **"Sync Now"** button under "Cloud Connection" on the Admin tab. This manually pushes your local records to the cloud and pulls any new records from other devices. Syncing is always manual — there is no automatic background sync.

Editing Connection Settings

Click **"Edit Connection Settings"** on the Admin tab to view or change the Supabase URL and anon key. This is useful if you need to update credentials or troubleshoot connection issues.

> **Warning:** Changing the Supabase URL or key will disconnect this device from the current cloud database. Only change these if instructed by the organization administrator or if migrating to a new Supabase project.

Connecting a Standalone Device to the Cloud

If a device was originally set up in Standalone (offline) mode and you later want to enable cloud sync:

1. Go to the **Admin** tab
2. Under "Cloud Connection", click **"Connect to Cloud"**
3. Enter the Supabase URL and anon key
4. Click **"Test & Connect"**
5. Once connected, the sync indicator appears and you can start syncing

Supabase Free Tier Limits

The free Supabase plan is sufficient for most field organizations:

- **500 MB database** — Sufficient for tens of thousands of patient records
- **Unlimited API requests**
- **2 GB bandwidth per month**

> **Note:** For most organizations running field outreach, the free tier is more than adequate. If your organization grows significantly, Supabase offers affordable paid plans. You can check your usage in the Supabase dashboard at supabase.com.

Best Practices for Administrators

1. **Set up backup early** — Configure USB backup and enable auto-backup before your first clinic day.
2. **Keep the formulary current** — Update medications when your supply changes. Hide out-of-stock items rather than deleting them.
3. **Use the eye toggles** — Hide unused items (labs, procedures, diagnoses, complaints) to keep forms clean and reduce clutter for clinicians.

4. **Review data quality weekly** — Check the Data Quality Dashboard in Analytics to catch incomplete records early.
5. **Sync the admin device regularly** — Configuration changes only reach other devices through the cloud. Sync after making changes.
6. **Name devices clearly** — Use descriptive names like "Clinic A Laptop" or "Triage Station" so you can identify them.
7. **Keep the admin password safe** — Write it down and store it securely. Share it only with trusted team members who may need to claim admin access on a different device.
8. **Export data regularly** — Use CSV export for external reporting and analysis. Generate donor reports after each outreach event.
9. **Brief your team** — Share the User Guide with clinicians and data entry staff. Walk them through creating an encounter before their first clinic day.
