Thank you for volunteering with AfS! This protocol outlines the basic responsibilities of the Record Keeper. The *FileMaker Pro* database instructions begin on page 4.

# I. Opening Clinic Day

## *Preparation:*

- Locate the following supplies as early as possible:
    a. Record Keeper Office Supply Box
    b. ID Wrist Bands
    c. Medical Record Forms
    d. AfS Laptop (unless you are using your own)
    e. Inkjet Printer

- Organize yourself and everyone around you to work in an orderly fashion so that nothing gets lost, and all charts are accounted for at the end of the day.

- Make sure you have an interpreter/helper with you at all times.

## *Patient Registration:*

This process will take up the vast majority of the first clinic day.

The system for Medical Record Numbers (MRN) is as follows: Patient Number–Site Code. For example, on a mission with a site code of HW23, the MRNs would be:

**001-HW23**
**002-HW23**
**003-HW23**
***etc.***

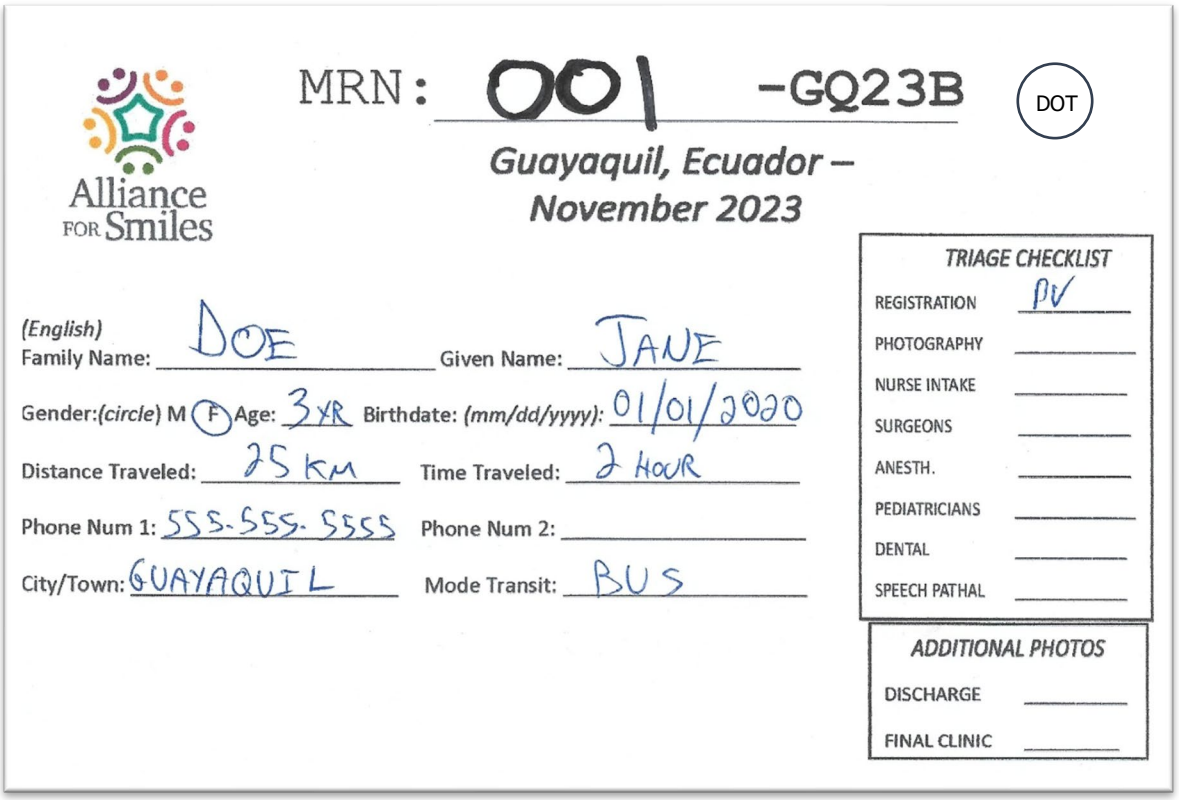
The AfS office will provide the site code. The record keeper assigns the patient numbers on-site, starting with 001 and going sequentially.

Here is the workflow for Patient Registration:

1. Patient walks up, and Record Keeper assigns them the next patient number (001, 002, 003, etc.)
2. Interpreter writes the MRN on a new patient chart and on patient's wrist band, as the Record Keeper enters this info into the FileMaker database.
3. Interpreter asks the patient to provide all of the personal information requested on the front sticker of the chart (name, birthdate, telephone number, etc.)
4. Interpreter writes all of this info on the chart, as the Record Keeper enters the data into *FileMaker*.
5. When all the information has been recorded, direct the patient to the next station (photography). Make sure to check off the "registration" box on the front of the chart, and give the chart to the patient, so they can carry it to the next station.
6. Repeat this process for all patients.

*Front of chart for patient 001.*

*Colored dot has not been assigned yet.*




After the patients have gone through all of the stations, the charts will start to trickle back to you (having been filled out by the doctors and nurses). DO NOT LET THE PATIENTS TAKE THE CHARTS OUT OF THE HOSPITAL.

As you get down-time, you should start to organize the charts that have been returned to you. All charts should have a dot on the front of them when they come back to you. Organize the charts by dot color.

DOT CODE:

- Green (Cleared for surgery)
- Red (Not cleared for surgery)
- Blue (Will do if there is time)
- Yellow (Follow up on next mission)

This is the way the OR scheduler will be working with the files after the first day of clinic.

At this time you should also start entering data from inside the charts into the *FileMaker* database. (See *FileMaker* instructions starting on page 5.) This info will be needed for the surgery schedule.

*Surgery Schedule*:
The lead nurse and lead surgeon will start working on the surgery schedule at the end of the first day. It is your responsibility to get the schedule entered into the database and printed out. If you are lucky, they will give you the next day's schedule while you are still at the hospital on the first day, so you can type it up and print it then. If not, you may need to take the laptop back to your hotel room to input the surgery schedule as soon as it is provided to you. Then you will have to print it up first thing the next morning (you will not have a printer in your hotel room).

You will also need to make sure that the charts of all patients scheduled for surgery the next day are pulled and given to the Pediatrician, so he/she can admit the patients the night before surgery.

# II. Day Two and On…

- Get to work as early as the earliest person going in. This will give you time to make sure accurate surgery schedules are posted where needed and get yourself organized for the day.
- Day two will be a little rough as far as the normal flow for you, because of the rush at the close of the prior clinic day.
- Try and get a confirmed surgery schedule for the next day as early as possible from whoever is in charge of making it. You will then need to pull all the charts for that surgery schedule and have them ready to go to the Pediatric ward by that afternoon for the new admits. (Now you have 2 batches of files out).
- Each day you will also be asked for a list of names and phone numbers for all patients receiving surgery the next day. This task can be completed easily with *FileMaker*.
- As the week goes on, charts will be returned to you for patients that have been discharged. These can now be finalized in *FileMaker*. At this point all the required data that you need should be in the chart for input.
- **Make certain that everyone is filling out the charts completely.** The surgeons need to fill out the *Surgical Values* and the *Operative Notes* portions of the pink pages. (You will most likely need to remind them of this several times.) Make sure the parents/guardians of patients are signing the Consent Forms.
- You will often be asked questions such as "How many patients have we done? How many procedures have we done? How many Green Dotted patients have not yet been scheduled?" All of this information can be obtained from the *FileMaker* database, but only if you keep it up to date. (For example, when surgery has been completed, change the surgery status from *Scheduled* to *Completed*.)
- If Dental is being done during your mission, you will also be tracking Dental procedures. Keep in mind that dental work may be done on a "Red Dot" patient even though surgery cannot be done.
- Throughout the week, "walk-in patients" will also come in. Just like on the first clinic day, you are responsible for assigning these patients a MRN, entering their data into *FileMaker* and onto the chart, and sending them onto the photographer.

- Toward the end of the mission, you will be asked to print Certificates of Appreciation for various people. The template for this certificate is on the mission laptop, and you will have special letterhead on which to print them.

- You have a lot of work in keeping track of all the charts, entering all the data, and performing all of the other tasks which are required of you. But if you stay calm and organized, you will be able to get everything done.

## III. Final Clinic Day

The arrangement will be similar to the Opening Clinic, except that only about 30% of patients will return for the Final Clinic.

- As the patient arrives, pull the chart for that patient, then direct the patient to the surgeons to be examined.

- Once the patient has been examined, the chart will be returned to you. Enter into *FileMaker* the small amount of information that has been added.

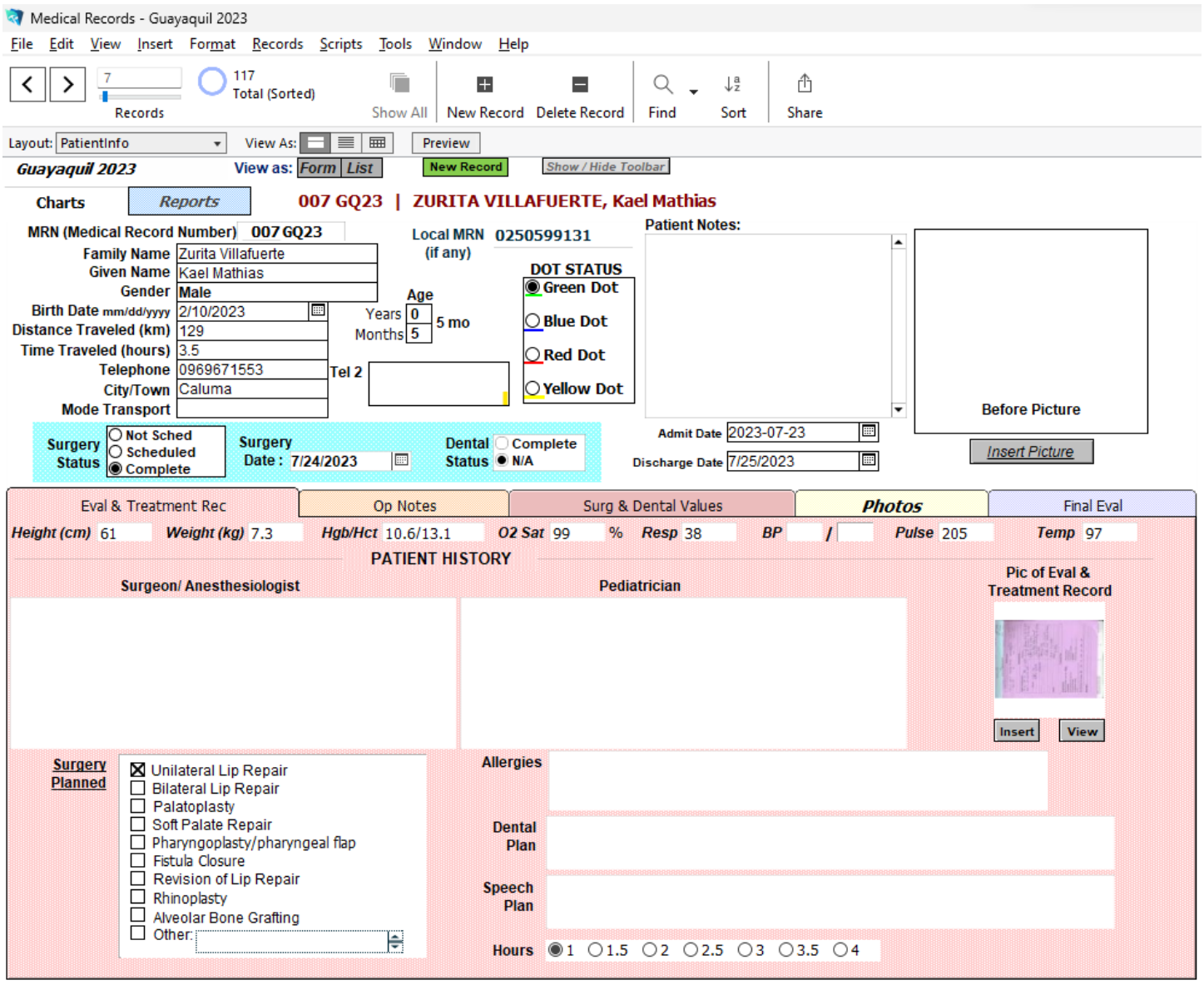
- You could be pushed a little to get the last bit of data into the database, since people will be anxious to go back to the hotel at this point. But if you kept up with the flow each day you should only have the discharge patients on the ward to add to your database records.

- When Clinic is over, take an inventory of all the charts to make sure none are missing. Give the charts to the hospital official that will be storing them.

# FILEMAKER PRO DATABASE INSTRUCTIONS

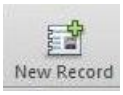
## ENTERING RECORDS

When you click on the "Charts" tab at the top of the screen, you will see the following screen:

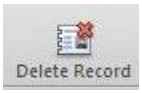



***The FileMaker database follows the general layout of the paper records***. The top white portion of the database corresponds to the front label on the paper record. The colored tabs on the lower half correspond to the various pages of the records.

The center teal section does not appear on the paper record and will only be changed when/if a patient is scheduled for surgery and/or dental work; and again, after the surgery/dental work has been completed. It is crucial that you always keep this teal section and the "Dot Status" section current. The status of the patients changes continually, and you will often be asked to give various tallies based on their most current status.

**To enter a new patient, press** 

**the icon at the top of the screen.**

**To delete a patient, press** 

**the icon at the top of the screen.**

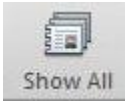
**To navigate through records, use the following**

**buttons:**

- The "page" icons move you one record at a time
- The slider bar moves you more rapidly through records.)

**To locate an individual record or a subset of records,**

**press the icon at the top of the screen.**

- You can perform a "find" based on any field (Medical Record Number, Family Name, Gender, etc.)
- If your find returns more than one record, use one of the navigation tools described above to move through the found set.
- When you are done viewing the found records, be sure to click the 

icon, or off the entered records will not be visible.

***Important Note: Various actions in FileMaker will often unexpectedly limit the visible records to a subset of the entire database. If you find that you cannot view all of your records, press the "Show All" icon.***

**To Sort the records, press**

**the icon at the top of the screen, and choose a field to sort by.**

- Note: Often the easiest way to sort records is from the List View…

***List View:*** To view patients in a List View, click on the *View as List* button. From here you can sort patients by various criteria (such as last name or MRN). Please note that if you have previously used the Find function to view an individual record or subset or records, only those records will be visible in the List View format.

## THE TABS

For all green-dotted patients you must complete all the tabs on the bottom portion, with the possible exception of the Final Eval tab (see below).

### *Eval & Treatment Rec*

This is the first section of the paper record that is completed once a patient is "green-dotted". You should start entering this info into the database as soon as the records start returning to you on the first day. The top section (Height, Weight, HGB, etc…) must be entered by hand so this information shows up on the surgery schedules. The rest of the form can be scanned in as a photo (no need to type in all of the medical jargon). Just click the "Insert" button in the appropriate area on this right site of this tab.

### *Op Notes*

Once a patient has received surgery, the surgeon will fill out the Operative Notes section of the paper record. Make sure that the surgeons fill this out completely. If they aren't completing their forms, you or the lead nurse can give them a gentle reminder.

### *Surg & Dental Values*

The surgeons also fill out the Values section of the paper record after surgery. Make sure you check off all boxes that the surgeons have checked. The anesthesiologist will enter the amount of time the patient was "out" and you enter that under Anesthesia Values.
The dental team does not use the same record as the surgical team, so they will usually give you a separate record of dental values at the end of each day. Enter those values when you get them.

### *Photos*

The mission photographer will give you a thumb drive every day with photos of the patients. The photos will be labeled using the following file name designations.

- 001-**A**-WZ14 = "Before" photo of patient number 001-WZ14
- 001-**B**-WZ14 = "Intra-Oral Before" photo of patient number 001-WZ14
- 001-**C**-WZ14 = "Intra-Oral After" photo of patient number 001-WZ14
- 001-**D**-WZ14 = "After" photo of patient number 001-WZ14
- 001-**E**-WZ14 = "Final Clinic" photo of patient number 001-WZ14

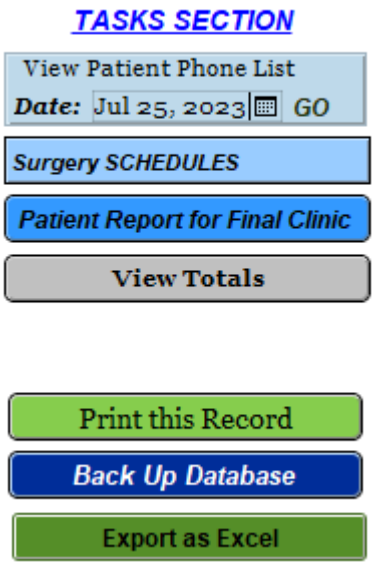
- The photo files you get from the photographer may contain extra numbers or letters at the end of the file name, but you can ignore everything after the WZ14 portion, in the example above.
- Many patients won't return for the Final Clinic, so you may not get many E photos.

### *Final Eval*

You only need to fill out this tab if a patient is seen at the Final Clinic, or if the surgeon feels that the patient requires a follow up for some reason.

## TASKS

The "Tasks Section" on the right side of the screen helps to automate a lot of tasks that will be asked of you.




### *View Patient Phone List*

Each day someone will probably ask you for a list of the names and phone numbers of the patients that are scheduled for surgery the next day. Just enter the date of the list you would like, and hit the View Patient Phone List button.

### *Surgery Schedules*

The lead nurse or lead surgeon will give you handwritten sheets containing the surgery schedules. You will then enter the information into the Daily Schedules screen and print as many copies as are needed.

Hit the ***New Day*** button to create a schedule for each day you need. At the top enter the date and day number (1 to 9) for that day's schedule. When you enter the MRN of a patient in the first line of the schedule, a couple things will happen: **1)** The name and data will be populated into the schedule. **2)** The Surgery Status of the patient will change to *Scheduled* and the Surgery Date will be entered.

You can then enter the other fields in the surgery schedule for each patient (OR number, Surgeon Name, Surgery Scheduled, etc.)

### *Patient Report for Closing Clinic*

This report summarizes helpful information for patients that return for the final clinic (i.e. surgery day, surgery performed, surgeon, etc.)

***View Totals***

The Totals screen gives you the total numbers and monetary values for all procedures that have been completed so far. Please note that this total will only be accurate if you have changed the surgery status to "Complete" for every patient completed, and you have checked off the correct procedures in the *Surg & Dental Values* tab.

***Print This Record***

This will print a screen shot of the patient record that is showing.

***Back Up Database***

Please make sure to back up the database every evening and save it to a thumb drive or the cloud (anywhere other than the mission laptop). Name the file to include the date of the backup.

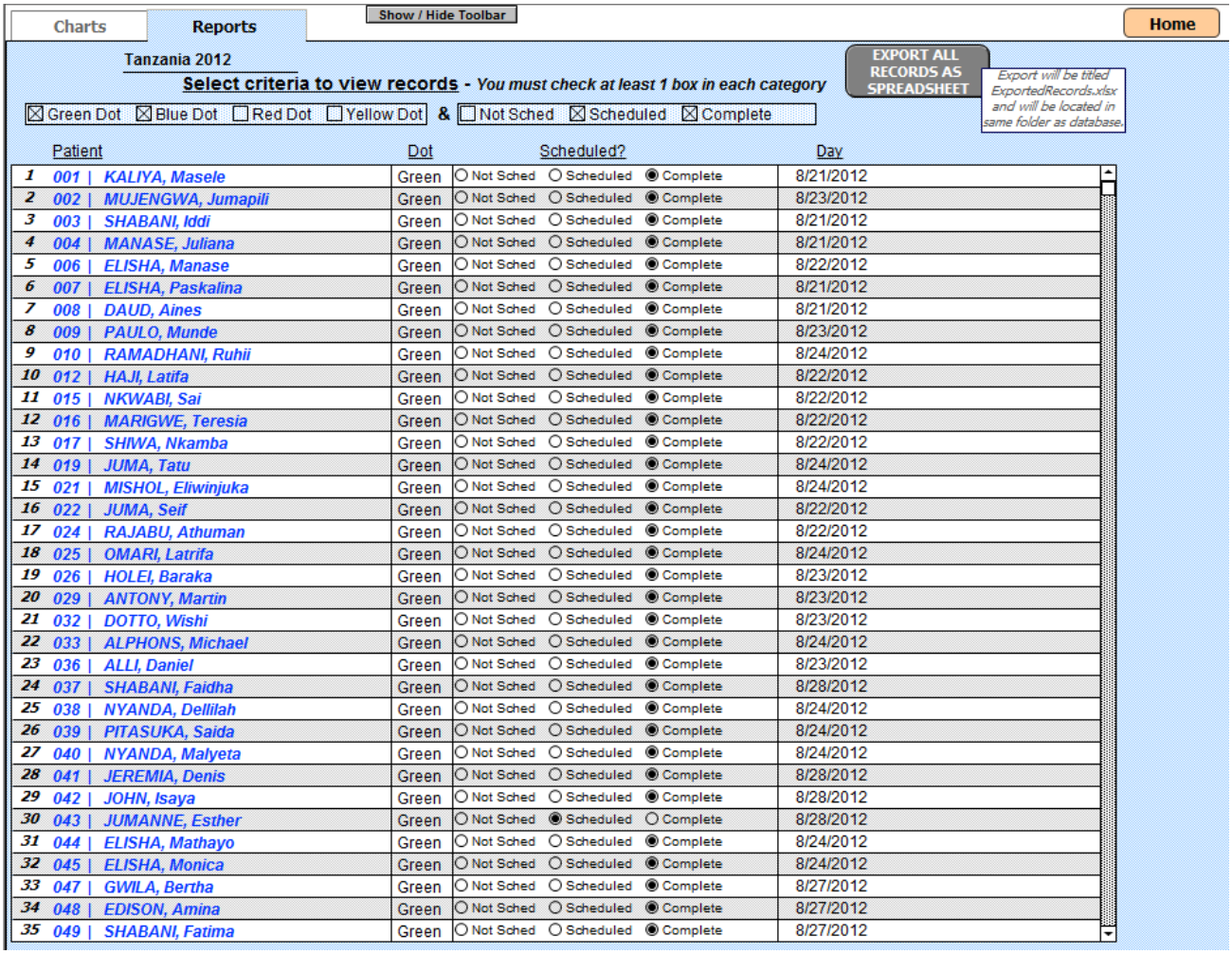
***Export as Excel***

You can choose to export the entire database, or only the current found set. The exported spreadsheet will be in the same folder as the FileMaker Pro database.

## REPORTS

The Reports section is simply another way to filter records and view them in a "list" view. By checking selection criteria, records can be filtered based on "Dot Color" and whether surgery is un-scheduled, scheduled, or completed. For example, you could choose to show all patients with Green Dots that have had surgery completed; or all patients with Green or Blue Dots that have not been scheduled for surgery.

The screenshot below is filtered for all patients with Green or Blue Dots, who are either Scheduled or Complete.



Charts | Reports | Show / Hide Toolbar | Home

Tanzania 2012

**Select criteria to view records** - *You must check at least 1 box in each category*

EXPORT ALL RECORDS AS SPREADSHEET

*Export will be titled ExportedRecords.xlsx and will be located in same folder as database.*

☒ Green Dot ☒ Blue Dot ☐ Red Dot ☐ Yellow Dot & ☐ Not Sched ☒ Scheduled ☒ Complete

| | Patient | Dot | Scheduled? | Day |
|---|---|---|---|---|
| 1 | 001 \| KALIYA, Masele | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/21/2012 |
| 2 | 002 \| MUJENGWA, Jumapili | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/23/2012 |
| 3 | 003 \| SHABANI, Iddi | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/21/2012 |
| 4 | 004 \| MANASE, Juliana | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/21/2012 |
| 5 | 006 \| ELISHA, Manase | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 6 | 007 \| ELISHA, Paskalina | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/21/2012 |
| 7 | 008 \| DAUD, Aines | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/21/2012 |
| 8 | 009 \| PAULO, Munde | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/23/2012 |
| 9 | 010 \| RAMADHANI, Ruhii | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 10 | 012 \| HAJI, Latifa | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 11 | 015 \| NKWABI, Sai | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 12 | 016 \| MARIGWE, Teresia | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 13 | 017 \| SHIWA, Nkamba | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 14 | 019 \| JUMA, Tatu | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 15 | 021 \| MISHOL, Eliwinjuka | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 16 | 022 \| JUMA, Seif | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 17 | 024 \| RAJABU, Athuman | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/22/2012 |
| 18 | 025 \| OMARI, Latrifa | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 19 | 026 \| HOLEI, Baraka | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/23/2012 |
| 20 | 029 \| ANTONY, Martin | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/23/2012 |
| 21 | 032 \| DOTTO, Wishi | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/23/2012 |
| 22 | 033 \| ALPHONS, Michael | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 23 | 036 \| ALLI, Daniel | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/23/2012 |
| 24 | 037 \| SHABANI, Faidha | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/28/2012 |
| 25 | 038 \| NYANDA, Dellilah | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 26 | 039 \| PITASUKA, Saida | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 27 | 040 \| NYANDA, Malyeta | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 28 | 041 \| JEREMIA, Denis | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/28/2012 |
| 29 | 042 \| JOHN, Isaya | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/28/2012 |
| 30 | 043 \| JUMANNE, Esther | Green | ○ Not Sched ◉ Scheduled ○ Complete | 8/28/2012 |
| 31 | 044 \| ELISHA, Mathayo | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 32 | 045 \| ELISHA, Monica | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/24/2012 |
| 33 | 047 \| GWILA, Bertha | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/27/2012 |
| 34 | 048 \| EDISON, Amina | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/27/2012 |
| 35 | 049 \| SHABANI, Fatima | Green | ○ Not Sched ○ Scheduled ◉ Complete | 8/27/2012 |

***Note:*** When you click the Export button, the exported spreadsheet will be in the same folder as the FileMaker database.

*Updated: 2023.09.13*