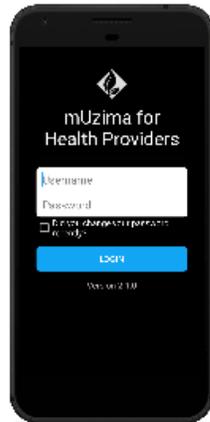# Using mUzima

First-time login

The first time you log in, you will have three text input prompts.

1. URL field: This is the prompt for the url to the server that the application will be communicating with e.g "https://demo2.muzima.org/"
2. Username: Enter the valid username for our demo, which is "admin."
3. Password: Enter the password for the username given to the demo, which is "test."

After successful authentication, you will be taken through a wizard to set up the mUzima app. Find the steps for the initial and advanced setup on this page Configuring mUzima.

mUzima dashboard

On successfully logging to the App, you'll see the mUzima dashboard which consists of:

1. Cohorts

2. Clients

3. Forms

4. Notifications

1. Cohorts

A cohort is a list of patients with similar characteristics or features. This can be a static list of patients that never changes (like a cohort of patients in a study) or a dynamic list of patients that is regenerated every time (for example a cohort of all male patients over 65 years of age)

- **Downloading a cohort(s)**

To download a cohort from the server-side onto your mobile device, make sure your mobile data is on and then follow the steps below:

1. Go to the mUzima dashboard and click on the cohorts tab.
2. Click on the "All" tab which will list all cohorts available on the server-side.
3. Select the cohort or cohorts you want to download
4. Click on the download button at the top right-hand corner.
5. Your cohort will be downloaded

Watch this video to learn more about downloading a cohort(s)

2. Clients

This is a list of all patients that make up the different cohorts downloaded. The following actions can be performed under the "Clients" tab

- **Client search**

Client search can be done against the local repository on the device or against the server.

To search for a patient or client against the local repository, follow the steps below:

1. Go to the clients' tab on the dashboard
2. Click on the search icon at the bottom right-hand corner.
3. Enter the name of the client you want to search for and proceed to search against the local repository
4. That client information will be displayed.
5. Alternatively, if the bar code scanner is installed, select the bar code scanner icon at the top right-hand corner and proceed search for the patient by scanning the bar code.

Watch this video to learn more about mUzima local client search.

To search for a client against the server, follow the same steps for local client search. If the client you are searching for is not on the local repository, you will be prompted to search against the server. Make sure your mobile data is turned on then proceed to search against the server. Watch this video to learn more about mUzima server-client search.

- **Client registration**

Before registering a client, search for the client from the "Clients" tab and make sure they are not already registered. Once you have confirmed that the client is not registered, go to the clients' tab and follow the steps below:

1. Select the "Create client" icon (Avatar icon with + sign) at the top right-hand corner
2. Select "No" when asked if the client already has an existing ID
3. Enter the information of the client you want to register
4. All fields with a red asterisk '*' are mandatory and MUST be filled
5. You can save the form as a draft and complete it later by going to the "Forms" tab and the "Incomplete forms" tab
6. Complete filling the form
7. Save the form as final by clicking on the save icon at the top
8. Your client summary will be displayed

Watch this video to learn more about registering a client on mUzima

- **Filling Forms**

Before filling in a form for a client make sure you have downloaded the correct form. If not go to the main mUzima dashboard and click on "***Forms***," click on "**All Form Templates**" tab, which will list all the forms.

Choose the correct form and click the download button.

After successfully downloading the form, go to the main mUzima dashboard and click "Clients."

Follow the steps below:

1. Locate the appropriate client and click on that client.
2. In the Forms section, you should be able to see at least one or more recommended forms.
3. Click on the appropriate form, i.e., the form you downloaded to your phone.
4. The form will load with the demographic details of the client.
5. Fill in the form for the client.

Note: Fields with a red asterisk '*' are mandatory and MUST be filled in.

Forms can be saved as drafts or saved as complete.

3. Forms

This tab lists all forms available on the server, it also offers the option to download new forms as users may require, shows downloaded, complete and incomplete forms to allow users to decide appropriately. Once the user clicks on the complete form data menu, an upload option shows up and complete forms can be uploaded.

- **Downloading a form**

In order to download a form from the server, make sure your mobile data is turned on and then follow the steps below:

1. Go the dashboard and then click on the "Forms" tab
2. Go the "All Form Templates" tab
3. Select the form(s) you would like to download and a download icon will appear at the top right-hand corner
4. Click on the download icon
5. Your form(s) will be downloaded

Watch this video to learn more about downloading a form

- **Uploading a completed form (Manual Sync)**

A form that has been filled and saved as complete can be uploaded to the server. To upload a form, follow the steps below;

1. Go the dashboard and then click on the "Forms" tab
2. Go the "Complete Form Data" tab
3. Click on the upload icon at the top right-hand corner
4. Your form(s) will be uploaded

4. Notifications

This tab lists all message communications between the device user and the server. The messages are grouped as

- Client specific messages - specific to a client
- General messages - which target the user

Patient relationships

This feature allows for linkage of patients within the Medical record system the same way this is permitted with OpenMRS.

To add relationships

For an already registered patient, tap on the *Clients* tab

Then search/select the patient that you want to create relationships for by tapping on the magnifier icon ( )
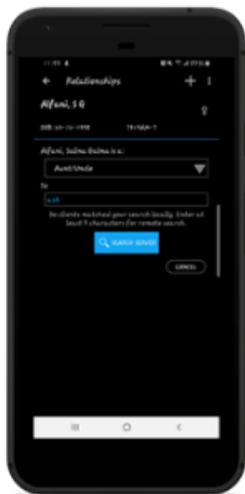

Then tap on the *Relationships* icon ( )

Tap on the **+** on the left-hand corner

Then select the relationship from the checkbox

Then type in the name of the patient to whom the earlier patient is related (this patient can be searched from the patients already saved on the mobile device or patients on the server.

Note: Searching against the server requires an internet connection

Patient Location Feature

This is a feature that was added to mUzima for Health providers to allow ease of location of patients within a given care programme.

1. If it's a new patient first register the patient by filling the patient registration
2. Turn on the (Enable) GPS on the device on which mUzima is running
3. Select an already registered patient from the client list

If a patient's location is not yet captured in the system, the application will prompt you to capture the location

4. Tap on the patient and then tap on the location icon at the right (The drag the map until you reach the true location for an encounter (this feature is to be used for patients that are registered during field visits)
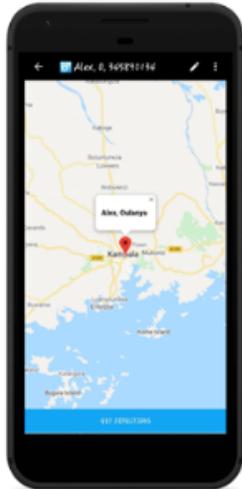
mUzima settings

mUzima Application gives you the chance to customize the application with your special requirements. This is done through default settings (settings that personalize the app to the user's needs), that can be personalized as illustrated here