

4.05. Programs

There are a number of ways of modelling programs in mSupply:

- completely separate sets of virtual stores for each program (see section [22.08. Virtual stores](#))
- tag stock with different program labels in the same store (see section [7.06. Custom stock fields](#))
- use the donor field as the program label (see section [7.07. Managing donors](#))
- and probably a few more ways you can think of!

You can also manage requisitions by program. This involves using some special settings for master lists. In this method, a program is an extension to a [master list](#). A program includes a standard list of items as well as:

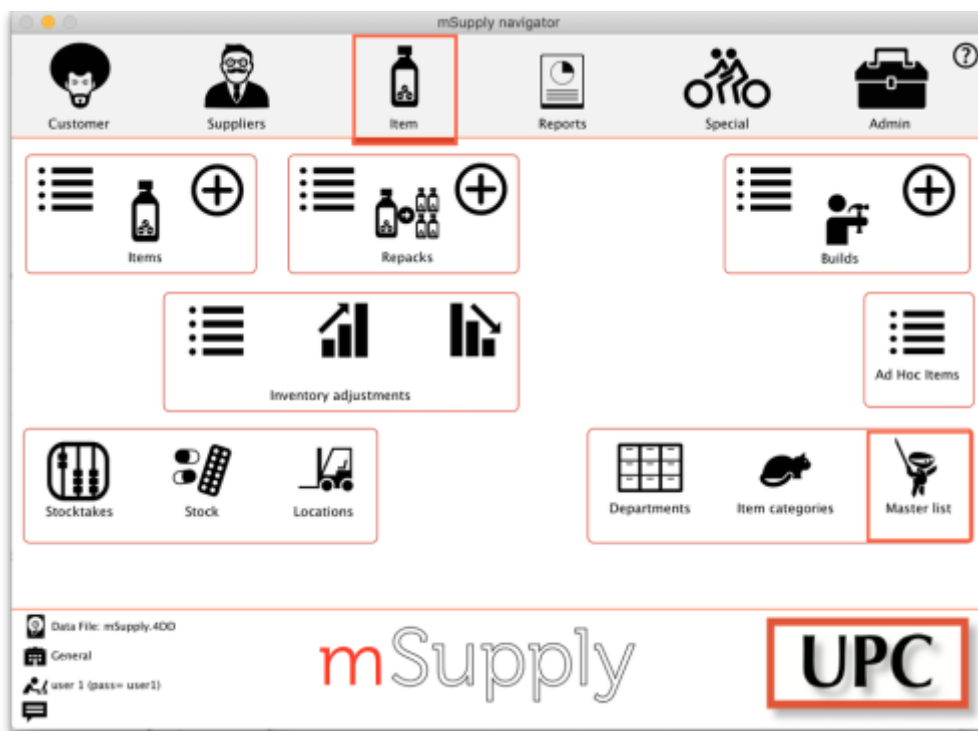
- **Order Types:** defined categories setting the maximum number of orders and quantity of stock to be ordered per period.
- **Period Schedules:** defined time intervals when orders can be placed; [schedules and periods](#) must be set up before creating programs.
- **Regimen Data:** a defined list of additional information that may need to be provided by a customer when making a program requisition.

Examples of items commonly managed by programs include Malaria, HIV and TB medicines and medical supplies.

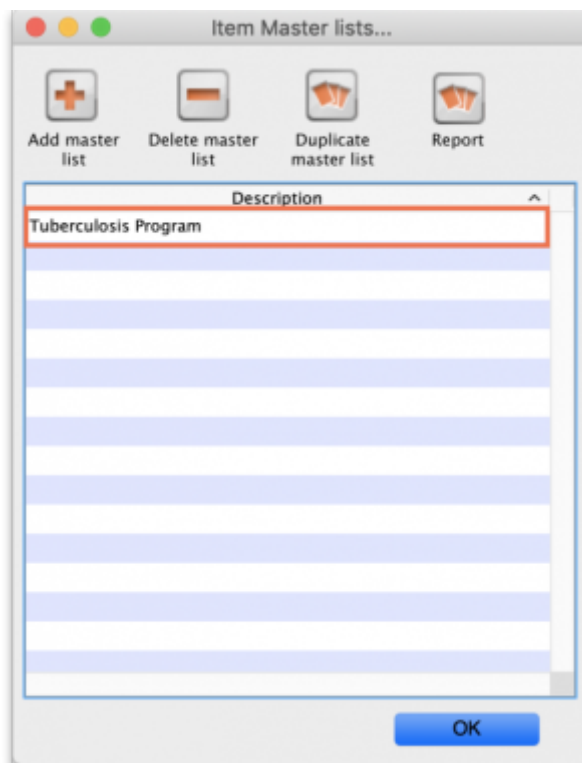
4.05.01. Creating a program

A program is defined by additional settings made to a master list:

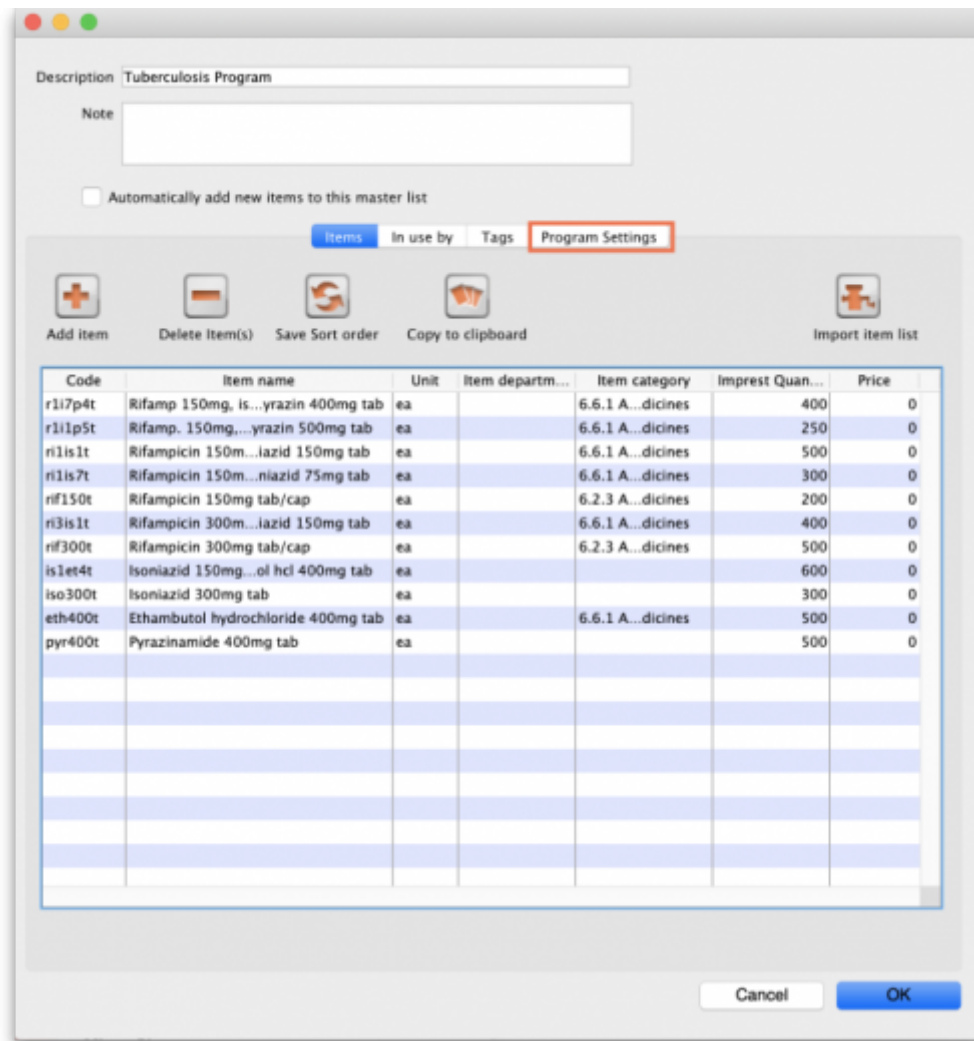
1. Navigate to the **Item** tab and click the **Master List** icon:



2. Double-click on a master list to open it (or [create a new master list](#)):



3. The Master list details window opens. Click on the **Program Settings** tab:



4. This shows all the settings available for a program:

Add item master list

Description:

Note:

Discount %

☐ Automatically add new items to this master list
☐ This master list is a patient list
☐ Is default price list

Created date: 17/10/2024
Created by: mSupply Support

Items | In use by | Tags | Program Settings

☒ This master list is a program ☐ HIV program ☐ Immunisation program

eLMS integration code:

Program tags

Tag:

Period schedule:

Order types

Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency

Regimen data

Code	Name	Type	Default

OK & Previous OK & Next Cancel OK

5. Tick the **This master list is a program** checkbox to enable the program based features for this master list.

- The **HIV program** and **Immunization program** checkboxes now appear. Check the **HIV program** checkbox if this is to be an HIV program (means extra indicators will be enterable when the program is being used). Check the **Immunization** checkbox if this is to be used as an immunization program to drive the immunization card functionality in Open mSupply (see the [Open mSupply Immunizations](#) page for details).
- Create a *Store tag* for the program by clicking on the  button just above the *Store tag* section.
- The **Tag** field will be automatically populated with a new tag. Edit this new tag name and click on the  button.
- The field then becomes a drop down list which will contain any existing name tags for you to select. The tick button also becomes a modify button . If you click it you will be able to edit the tag name you just entered.
- When you click on the **OK** button any new tags you have created will be saved and will appear in the name tags list (see the [5.05. Name tags](#) page for details).

You can edit the tags entered here **until** you close this window. After that, you cannot edit existing ones, you can only delete them and add new ones.

Any customers or stores that have a name tag matching the tag you set here will be able to use this

program and the **schedule** you have set for that tag.

You can define multiple tags for each program.

For each tag, you set up both a [schedule](#) and order types- so for one program, you can have different facilities on different schedules

6. Select the **Period Schedule** from the dropdown list (you must have set up the [schedules and periods](#) first):

7. For each period schedule, one or more **Order Types** can be created - these set the parameters for program requisitions. Add order types by clicking the plus icon.

8. Give each order type a unique name and set its parameters:

- **Emergency:** check this box if the order type is for emergencies.
- **Max orders per period:** maximum number of orders that can be placed in a given period.
- **Max MOS:** maximum number of months' stock to be kept for each item. Used in the calculation of the suggested amount to order.
- **Threshold MOS:** items with a number of months' stock less than this value will appear in the order by default.
- **Max lines:** maximum number of items allowed to be ordered for an emergency order (default = 5); an alert will appear if the user tries to exceed the maximum number of items allowed.

Order types

ie	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency
er	Order type	1	3.0	5	1.0	☒
	Order type	1	3.0		1.0	☐

Regimen data

Code	Name	Type	Default	Is Required?

Cancel

OK

4.05.02. Adding indicators to a program

Indicators are used for reporting on the performance of programs, e.g. the number of patients treated. Each indicator value provides data on a metric for a particular store and regimen over a given period. Indicator values are recorded while creating a program requisition.

Indicators can record any relevant programme data, including that data that may be used to select a regimen (defined as a treatment plan that specifies the dosage, the schedule, and the duration of treatment.) The country that funded this feature uses the term **Regimen data** for *all* these indicators, and so that term has been used in this window.

Indicators allow an organisation to analyse regimen performance and determine what further data should be collected, stored and processed.

To add indicators to a program:

- Open the program via the **Master List** (Click on the **Master list** icon on the *Item* tab of the Navigator).
- Click on the **Program Settings** tab.
- In the **Regimen Data** table add fields for the data that should be provided to the supplier with each program requisition
- Check the **HIV program** checkbox if you want a fixed set of HIV-related indicators to be entered for this program.
- If the customer **must** provide this information for supply to occur, tick the **Is required?** box to make this a mandatory requirement.

Add item master list

DescriptionTest master list

Note

Discount % 0

☐ Automatically add new items to this master list

☐ This master list is a patient list

☐ Is default price list

Created date: 17/10/2024

Created by: mSupply Support

ItemsIn use byTagsProgram Settings

☒ This master list is a program

☐ HIV program

☐ Immunisation program

aLMS integration code

Program tags

Tag

Period schedule

Order types

Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency

Regimen data

Code	Name	Type	Default

OK & Previous

OK & Next

Cancel

OK

4.05.03 Connecting a program to a store

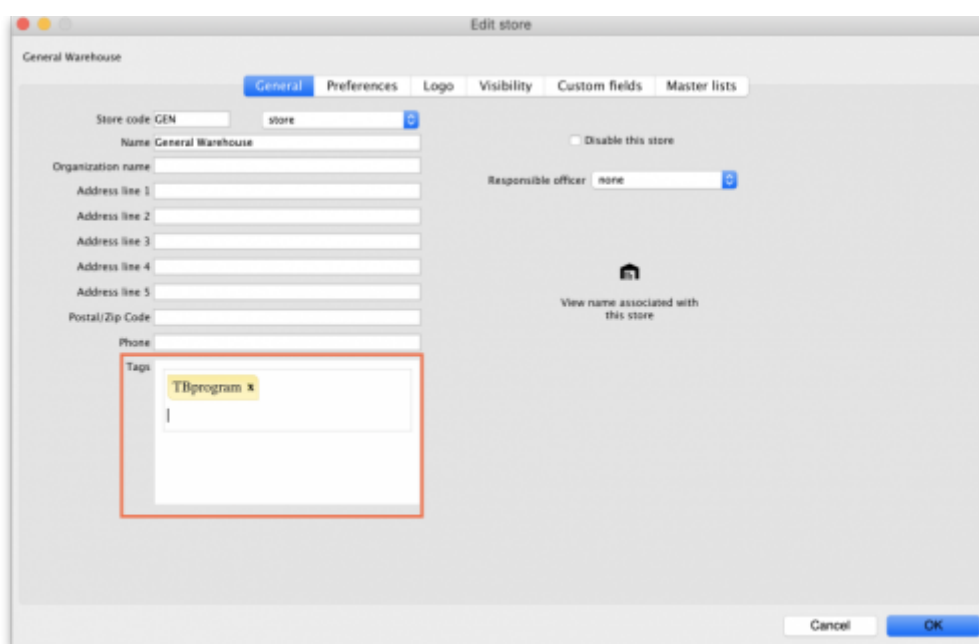
To allow a store to place program requisitions:

1. Navigate to the **Special** tab and click on the **Stores** icon:

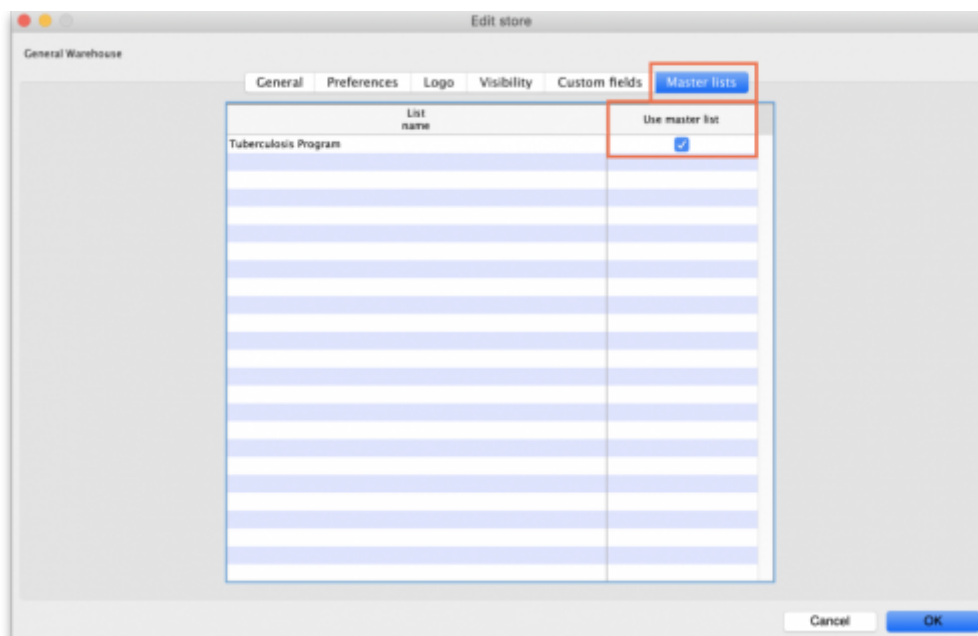


2. Double click on the store.

3. In the **Tags** field, type in the Store Tag you set for the program and schedule above then press *Tab*.



4. Click on the **Master Lists** tab, check the **Use master list** box next to the program master list to be used:

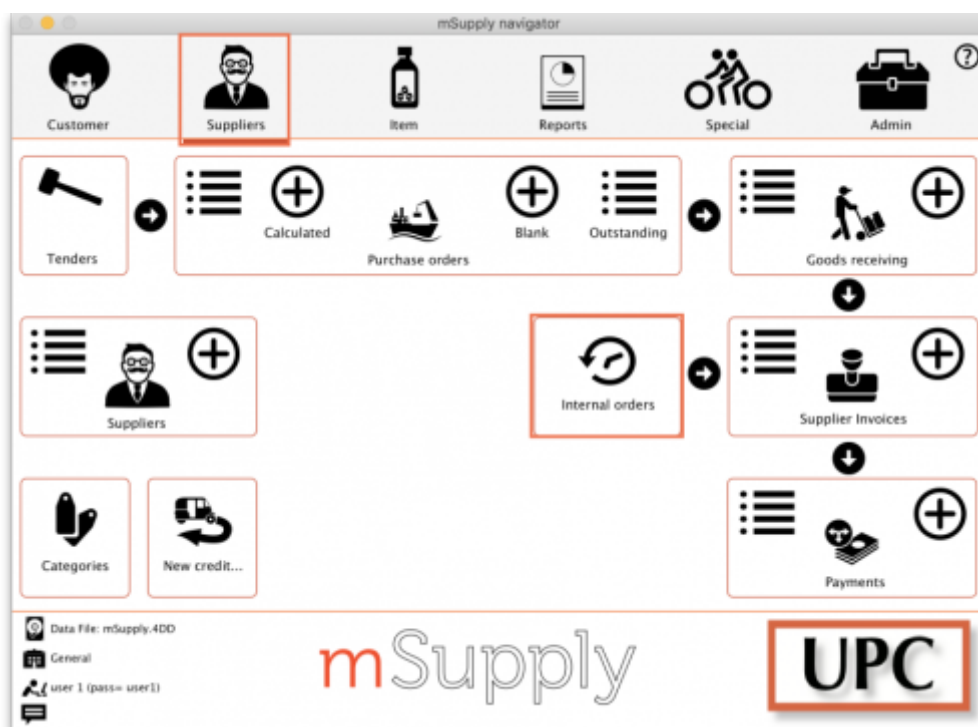


5. All done - the store is now connected to the program you have created so click on the **OK** button to save all the settings.

4.05.04. Creating a program requisition

Once a store has been connected to a program, it can then place program requisitions:

1. In the customer store, navigate to the **Suppliers** tab and click on the **Internal Orders** icon:



2. Click **New Internal Order**. When a store uses programs, they will have the option to create a **Program** order or **General** (regular) order:

The screenshot shows a 'New internal order' window. Under 'Order type', the 'Program' radio button is selected. The 'Order details' section includes dropdowns for 'Program' (Tuberculosis Program), 'Requisition type' (Normal order), and 'Period' (January 2020). The 'Supplier' field is empty with a placeholder text. Below these are 'Start date' (1/1/20) and 'End date' (31/1/20). At the bottom right, the 'OK' button is highlighted.

Check the **Program** button to create a program requisition.

3. In the **Order Details** section, select the **Program**, **Requisition Type** and **Period** from the dropdown lists. Enter the **Supplier** by typing the first few letters, pressing *Tab* and selecting the supplier from the list of those starting with what you typed. These details need to be entered sequentially as the program uses them to determine the requisition type, which in turn determines the period.

The **maximum number of program orders** that can be requested within a given period is set when the program is created (*Max. orders per period*).

If you try to create another order for the same period which **exceeds the maximum number**, an error message will appear and you will not be able to proceed.

4. Click **OK** to generate an internal order with all the items listed in the program master list. The details relating to the program order are in the top left. Review the data in the table, then enter the quantity of stock to be ordered in the **User requested quantity** column:

Supplier: Central Medical Stores CMS Reference: ID: 5
 Order date: 22/10/19 Black Status: ug
 Program: Tuberculosis Program Type: request
 Order type: Regular Max MOS: 3.0 Entry date: 22/10/19
 Period: January 2020 Threshold MOS: 1.0 Entered by: user 1 (pass=st)
 From: 1/1/20 To: 31/1/20 Filter items: Filter by item name or code Store: General

Buttons: Data entry Log Custom data

LI.	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Comment
1	r17p4t	Rifamp 150mg, is...yrazin 400mg tab	ea	0	0	0	0	20	
2	r13a9t	Rifamp 150mg, is...pyrazin 500mg tab	ea	0	0	0	0	30	
3	r13a1t	Rifampicin 150mg...isoniazid 150mg tab	ea	0	0	0	0	40	
4	r13a7t	Rifampicin 150mg...isoniazid 75mg tab	ea	0	0	0	0	100	
5	r1310t	Rifampicin 150mg tab/cap	ea	0	0	0	0	50	
6	r13a1t	Rifampicin 300mg...isoniazid 150mg tab	ea	0	0	0	0	60	
7	r1300t	Rifampicin 300mg tab/cap	ea	0	0	0	0	100	
8	r1a14t	Isoniazid 150mg +...zol hcl 400mg tab	ea	0	0	0	0	100	
9	se100t	Isoniazid 300mg tab	ea	0	0	0	0	80	
10	et400t	Ethambutol hydrochloride 400mg tab	ea	0	0	0	0	50	
11	py400t	Pyrazinamide 400mg tab	ea	0	0	0	0	70	

Buttons: Save Sort order Finalise Cancel OK & Next OK

5. Click the **Indicators** tab to enter the additional data defined for the program:

Supplier: Order date: 24/11/20 Black Status: new
 Program: HIV Type: request
 Order type: Order type: DECEMBRE 2018 Entry date: 24/11/20
 Period: From: 1/12/18 To: 31/12/18 Entered by: Admin
 Store: mobile

Buttons: Data entry Log Indicators

Name	Code	Valeur	Commentaire
Regimen Data Name	Regimen Code	0	

Description	Code	Patients adultes regus	Patients enfants regus	Patient stable adulte	Patient stable enfant	Nouvelle inclusion ad...	Nouvelle inclusion en...	
Regime A...ire Ligne	AZT/3TC/NVP	0	0	0	0	0	0	0
Regime A...ire Ligne	AZT/3TC/EPV	0	0	0	0	0	0	0
Regime A...ire Ligne	AZT/3TC/TDF	0	0	0	0	0	0	0
Regime A...ire Ligne	AZT/3TC/UPV/v	0	0	0	0	0	0	0
Regime A...ire Ligne	TDF/3TC/EPV	0	0	0	0	0	0	0
Regime A...ire Ligne	TDF/3TC/UPV/v	0	0	0	0	0	0	0
Regime A...ire Ligne	AZT/3TC/ABC	0	0	0	0	0	0	0
Regime A...ire Ligne	ABC/3TC/NVP	0	0	0	0	0	0	0
Regime A...ire Ligne	ABC/3TC/UPV/v	0	0	0	0	0	0	0
Regime A...ire Ligne	ABC/3TC/EPV	0	0	0	0	0	0	0

Buttons: Cancel OK & Next OK

This data will be sent to the supplier with the requisition when the requisition is finalised.

6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.

Supplier: Central Medical Stores

CMS

Reference:

ID: 5

Status: sg

Type: request

Entry date: 22/10/19

Entered by: user 1 (pass= us

Store: General

Order date: 22/10/19

Black

Comment:

Max MOS: 3.8

Threshold MOS: 1.8

Hide stock over threshold

Program: Tuberculosis Program

Order type: Regular

Period: January 2020

From: 1/1/20

To: 31/3/20

Filter items: Filter by item name or code

Print

Save Sort order

Finalise

Cancel

OK & Next

OK

U...	Item code	Item name	Unit	Our stock on hand	Average monthly consump...	Months of stock	Calculated quantity	User requested quantity	Comment
1	r117p4t	Rifamp 150mg, is...razin 400mg tab	ea	0	0	0	0	20	
2	r111p5t	Rifamp 150mg, is...razin 500mg tab	ea	0	0	0	0	30	
3	r111a3t	Rifampicin 150mg...oniazid 150mg tab	ea	0	0	0	0	40	
4	r111a7t	Rifampicin 150mg...oniazid 75mg tab	ea	0	0	0	0	300	
5	r12150t	Rifampicin 150mg tab/cap	ea	0	0	0	0	50	
6	r111a3t	Rifampicin 300mg...oniazid 150mg tab	ea	0	0	0	0	60	
7	r12300t	Rifampicin 300mg tab/cap	ea	0	0	0	0	300	
8	r11a14t	Isoniazid 300mg +...tel hel 400mg tab	ea	0	0	0	0	300	
9	ra3000t	Isoniazid 300mg tab	ea	0	0	0	0	80	
10	wh4001t	Ithambutol hydrochloride 400mg tab	ea	0	0	0	0	50	
11	py4001t	Pyrazinamide 400mg tab	ea	0	0	0	0	70	

4.05.05. Creating a program stocktake

Creating a stocktake with items from a particular program is just the same as creating a normal stocktake. The only difference is that you select the program in the **Master list** (or **Program**) filter:

1. Navigate to the **Item** tab and click the **Stocktakes** icon:

Customer

Suppliers

Item

Reports

Special

Admin

Items

Repacks

Builds

Inventory adjustments

Ad Hoc Items

Stocktakes

Stock

Locations

Departments

Item categories

Master list

Data File: mSupply.400

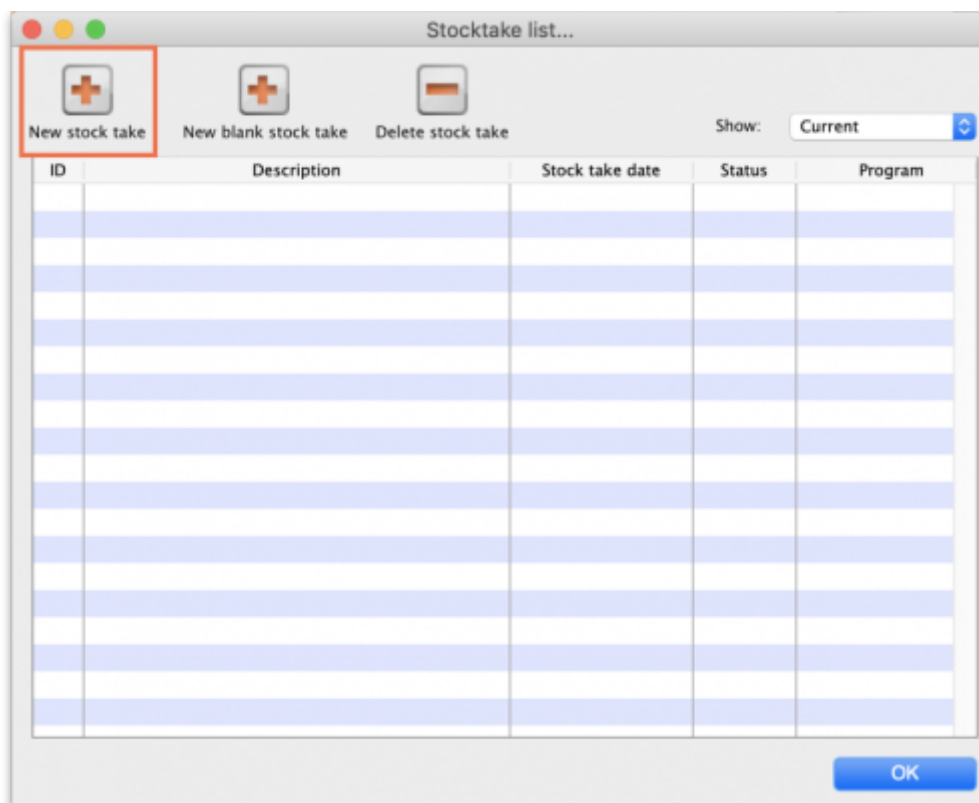
General

user 1 (pass= user1)

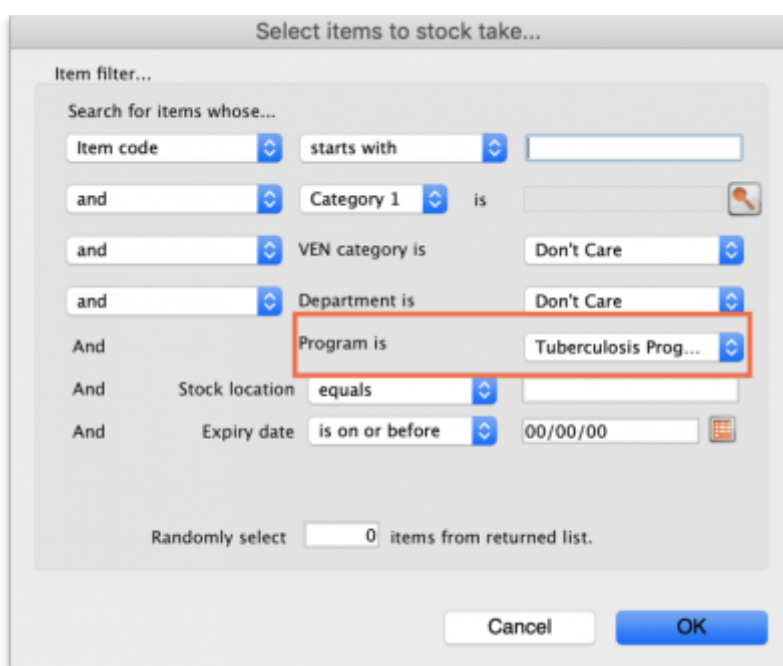
mSupply

UPC

2. The list of stocktakes window opens. Click the **New Stocktake** icon:



3. Select the program from the **Program is** (or **Master list is**) dropdown menu and click the **OK** button to pre-populate your stocktake with items from the program:



Note: To further refine the selection of stock appearing in the stocktake you can also select other filter items at the same time.

For detailed information on how to complete the stocktake, refer to the [4.17. Stocktakes](#) section.

Tip: In your stocktakes list, you can easily identify program stocktakes by referring to the **Program** column:

[illegible]

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