

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:

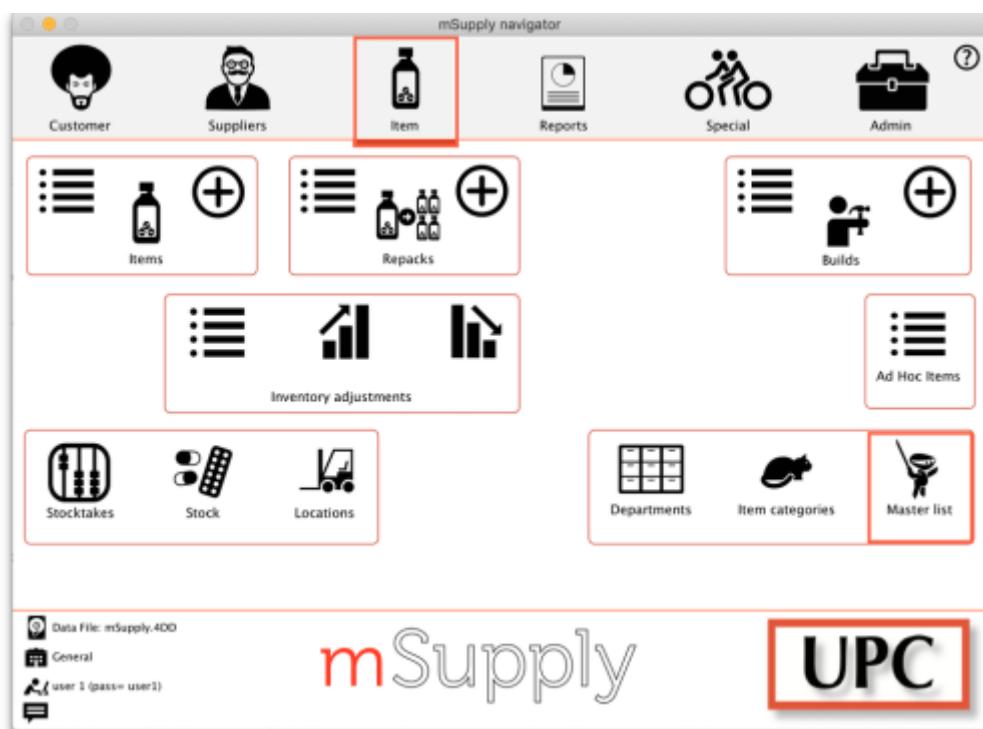
- **Order Types:** defined categories setting the maximum number of orders and quantity of stock to be ordered per period.
- **Period Schedules:** defined time intervals when orders can be placed; [schedules and periods](#) must be set up before creating programs.
- **Regimen Data:** a defined list of 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 tuberculosis medicines and medical supplies.

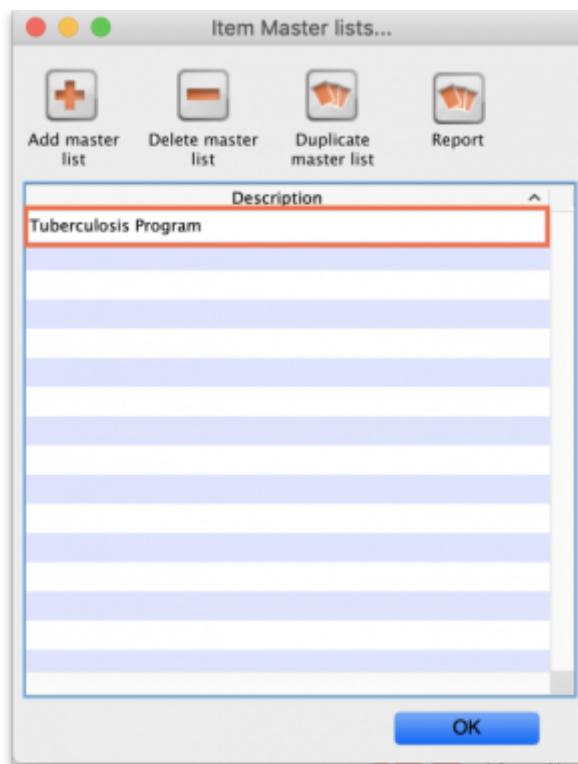
4.05.01. Creating a program

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

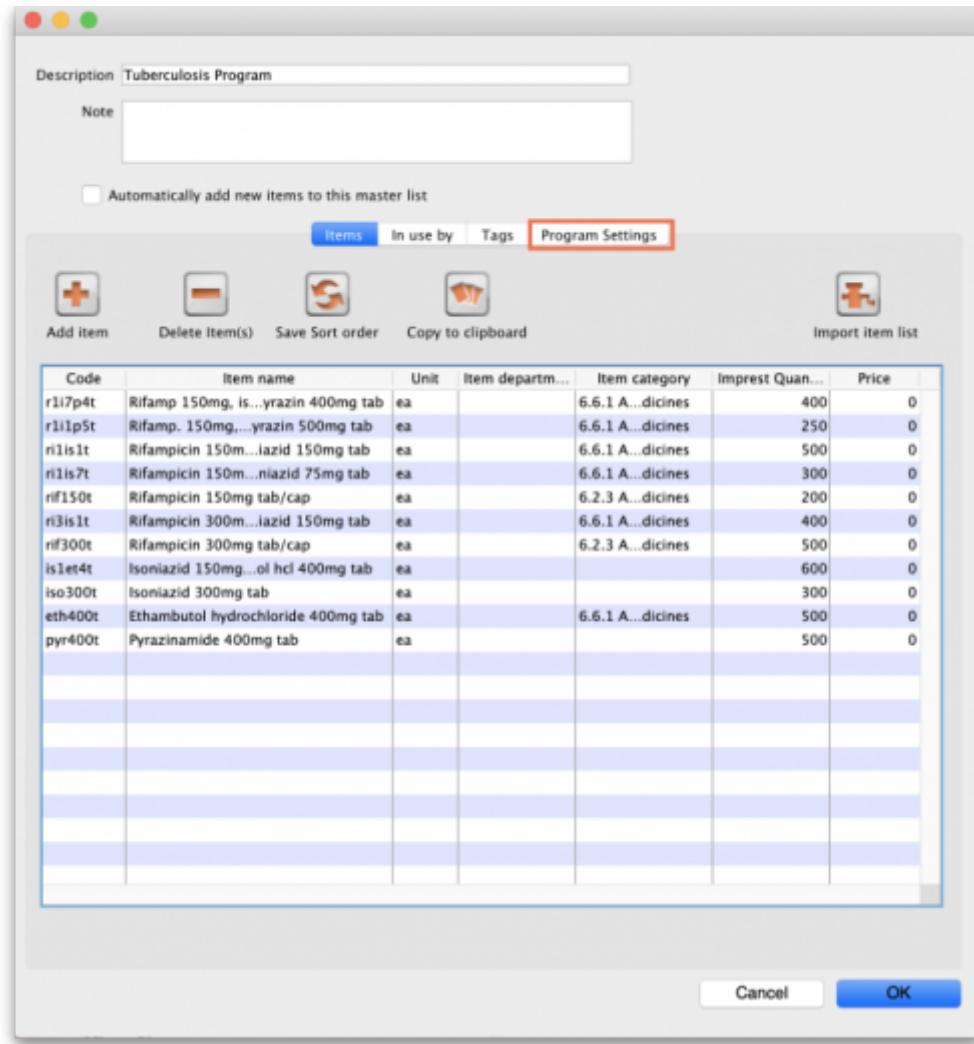
1. Navigate to the **Item** tab and click the **Master List** icon:



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	Test master list	Created date:	17/10/2024																																																	
Note	Created by: mSupply Support																																																			
Discount %	0																																																			
<input type="checkbox"/> Automatically add new items to this master list <input type="checkbox"/> This master list is a patient list <input type="checkbox"/> Is default price list																																																				
Items In use by Tags Program Settings																																																				
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5. Tick the box **This master list is a program** to enable the program based features for this master list. Create a **Store Tag** for the program by clicking the plus icon (this is necessary to connect stores to the program later).

6. Name the store tag and click the tick icon.

7. Select the **Period Schedule** from the dropdown list (you must have set the periods up first):

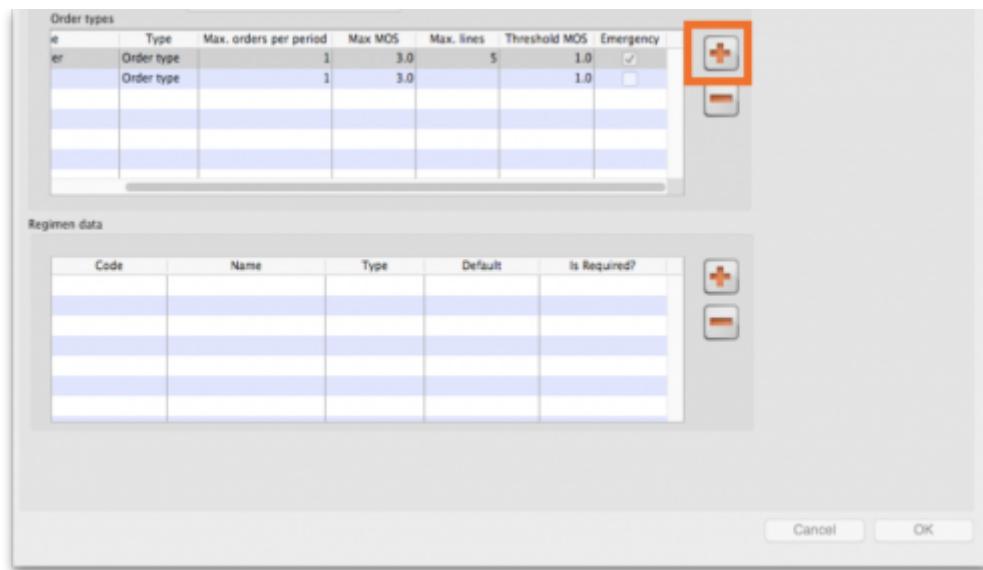
Description: Tuberculosis Program

Note			
<input type="checkbox"/> Automatically add new items to this master list			
<input checked="" type="checkbox"/> This master list is a program Program Settings			
eLMIS integration code: <input type="text"/>			
Store tags Tag: <input type="text" value="TBprogram"/> <input checked="" type="checkbox"/> Period schedule: <input type="text" value="Monthly"/>			
Order types			

8. 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.

9. 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.



4.05.02. Adding indicators to a program

Indicators are used for reporting on the performance of programs (drug regimens). 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 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 e.g. the number of patients treated.
- 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

Description: Test master list	Created date: 17/10/2024
Note:	Created by: mSupply Support
Discount %: 0	
<input type="checkbox"/> Automatically add new items to this master list	
<input type="checkbox"/> This master list is a patient list	
<input type="checkbox"/> Is default price list	

Items In use by Tags Program Settings

This master list is a program HIV program Immunisation program

eLMIS integration code:

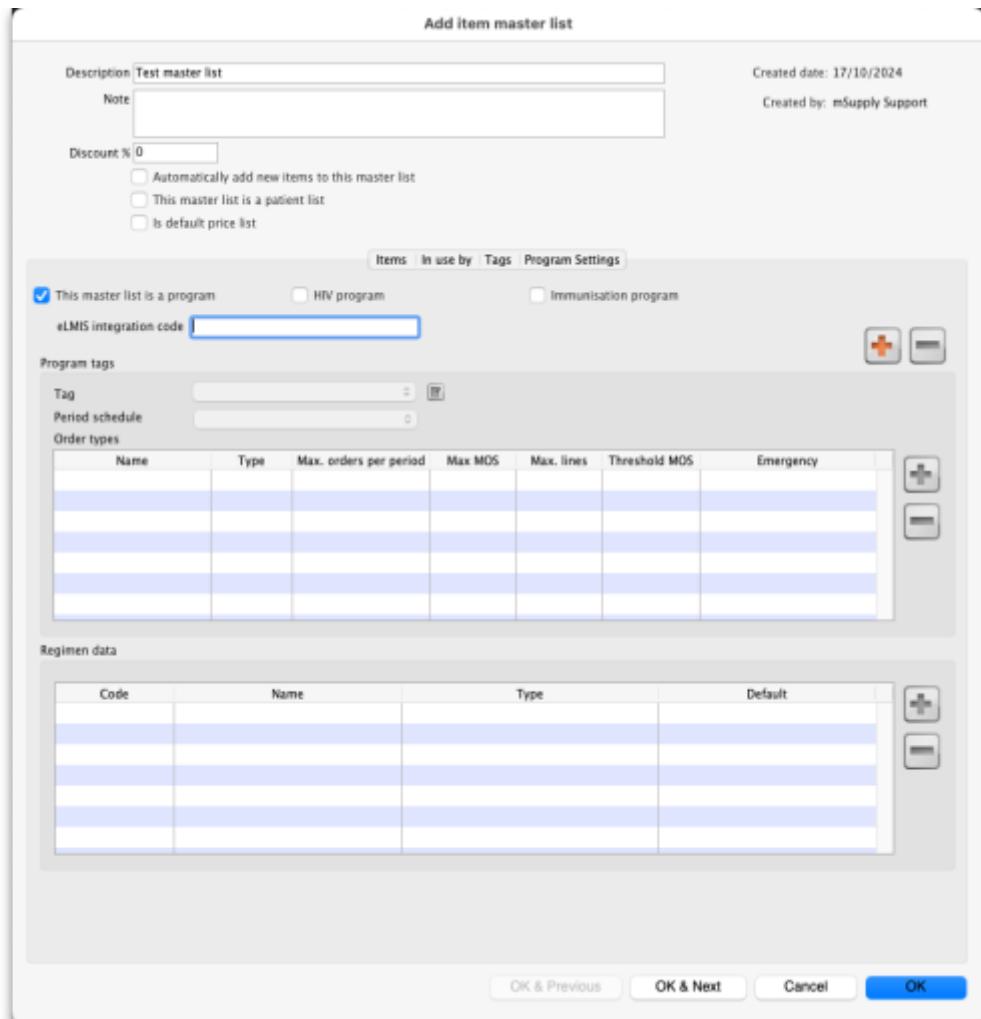
Program tags

Tag: <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>				
Period schedule: <input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>				
Order types						
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Regimen data

Code	Name	Type	Default
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK & Previous OK & Next Cancel OK



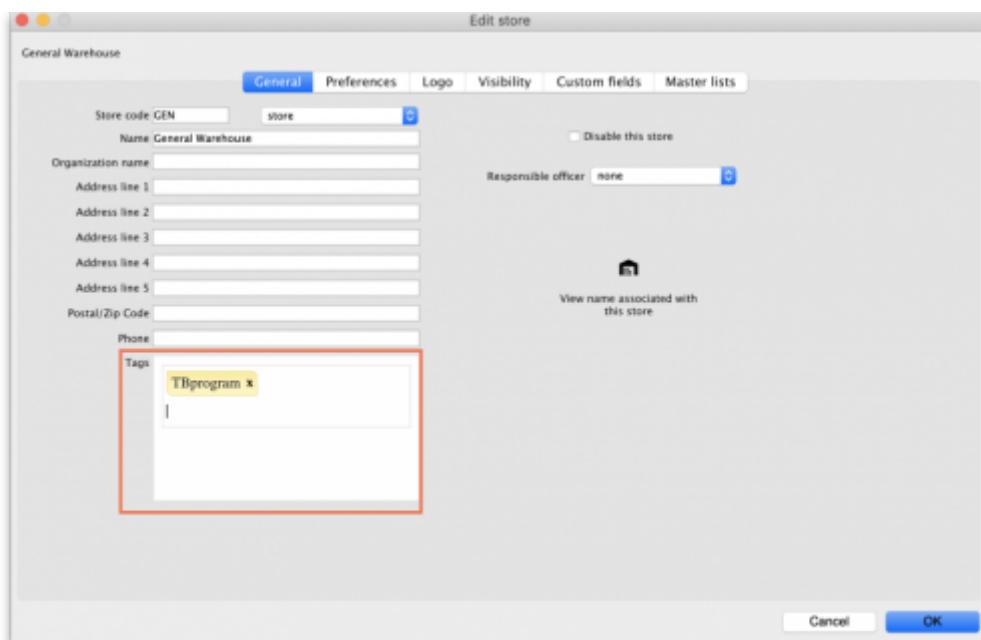
4.05.03 Connecting a program to a store

To allow a store to place program requisitions:

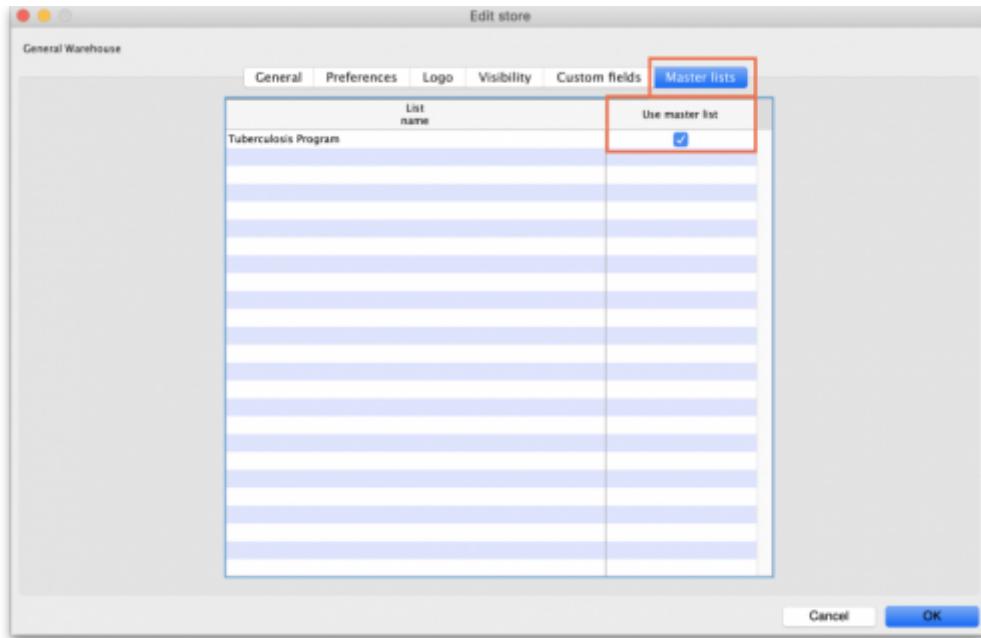
1. Navigate to the **Special** tab and click on the **Stores** icon:



2. Double click on the store.
3. In the **Tags** field, type in the Store Tag you set for the program 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:

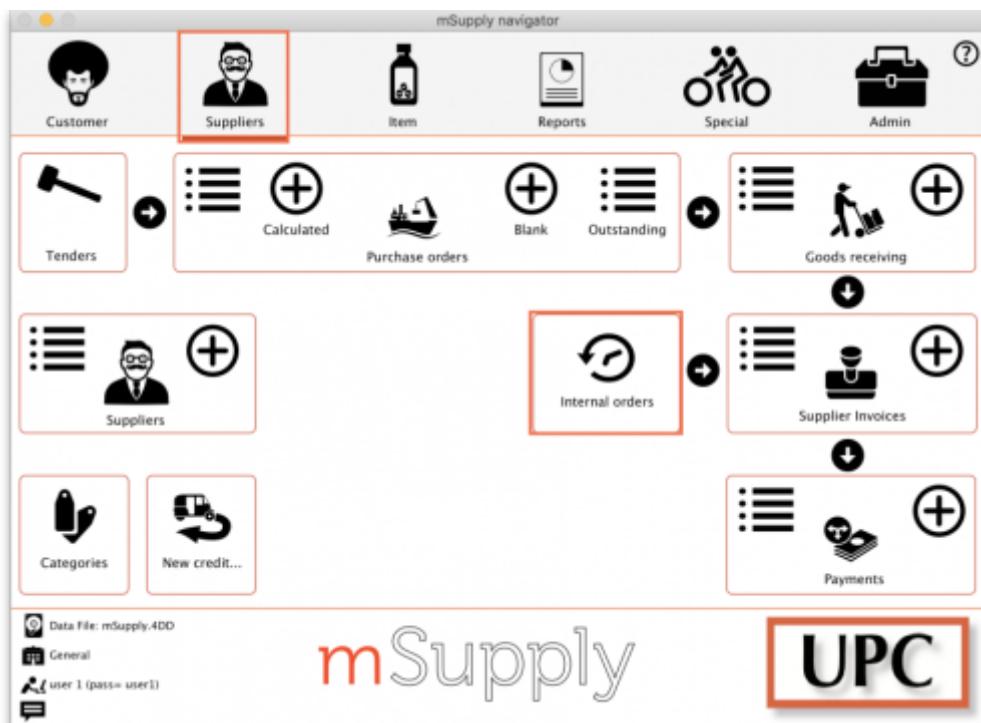


5. All done - the store is now connected to the program you have created so click on the **OK** button to save all the settings.

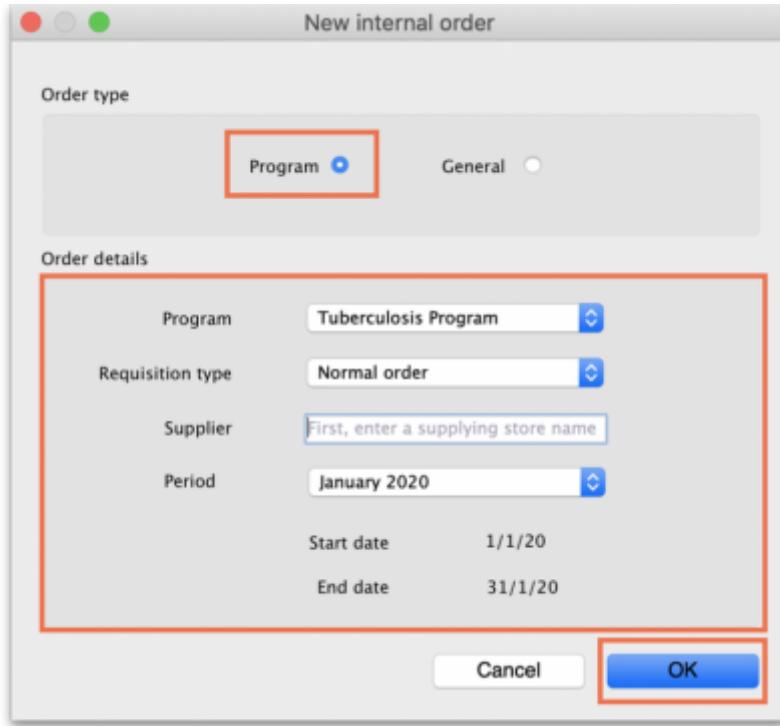
4.05.04. Creating a program requisition

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:



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:

The screenshot shows a requisition entry window with the following details:

- Supplier:** Central Medical Stores (CMS)
- Order date:** 22/01/19
- Program:** Tuberculosis Program
- Order type:** Regular
- Period:** January 2020
- From:** 1/1/20 **To:** 31/1/20
- Threshold MOD:** 1.0 Hide stock over threshold
- Comments:** Reference: [empty], Comment: [empty]
- Stock Status:** ID: 5, Status: sg, Type: request, Entry date: 22/01/19, Entered by: user 1 (pass=st), Store: General

The main table lists items with their details and requested quantities:

U...	Item code	Item name	Unit	Our stock on hand	Average monthly consumption...	Months of stock	Calculated quantity	User requested quantity	Comment
1	111794	Rifamp 150mg, is... pyrazin 400mg tab	ea	0	0	0	0	20	
2	111895	Rifamp 150mg, is... pyrazin 400mg tab	ea	0	0	0	0	30	
3	111912	Rifapentine 150mg, isoniazid 150mg tab	ea	0	0	0	0	40	
4	112077	Rifapentine 250mg...isoniazid 75mg tab	ea	0	0	0	0	100	
5	112100	Rifapentine 150mg tab/cap	ea	0	0	0	0	50	
6	112111	Rifapentine 300mg, isoniazid 150mg tab	ea	0	0	0	0	60	
7	112300	Rifapentine 300mg tab/cap	ea	0	0	0	0	100	
8	112494	Isoniazid 150mg +...tol hcl 400mg tab	ea	0	0	0	0	100	
9	112501	Isoniazid 300mg tab	ea	0	0	0	0	80	
10	112600	Ethambutol hydrochloride 400mg tab	ea	0	0	0	0	50	
11	112700	Pyrazinamide 400mg tab	ea	0	0	0	0	70	

Buttons at the bottom: **Save Sent order**, **Finalise**, **Cancel**, **OK & Next**, **OK**.

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

The screenshot shows a requisition entry window with the following details:

- Supplier:** [empty]
- Order date:** 24/01/20
- Program:** HIV
- Order type:** Order type
- Period:** DECEMBER 2018
- From:** 1/12/18 **To:** 31/12/18
- Threshold MOD:** 1.0 Hide stock over threshold
- Comments:** Reference: [empty], Comment: [empty]
- Stock Status:** ID: 1, Status: nw, Type: request, Entry date: 24/01/20, Entered by: Admin, Store: mobile

The main table lists regimen data:

Name	Code	Valeur	Commentaire
Regimen Data Name	Regimen Code1	0	

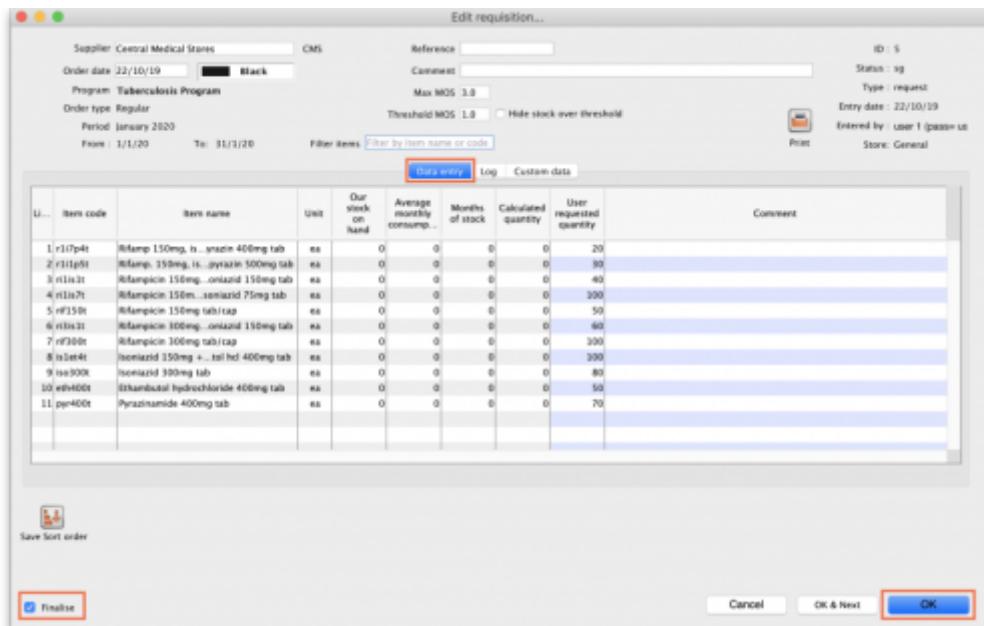
Below the table is a detailed regimen list:

Description	Code	Patients adultes reçus	Patients enfants reçus	Patient stable adulte	Patient stable enfant	Nouvelle inclusion adulte	Nouvelle inclusion enfant
Régime A...ère Ligne	AZT/3TC/NVP	0	0	0	0	0	0
Régime A...ère Ligne	AZT/3TC/DFV	0	0	0	0	0	0
Régime A...ère Ligne	AZT/3TC/TDF	0	0	0	0	0	0
Régime A...ère Ligne	AZT/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	DDI/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	DDI/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/ABC	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/NVP	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/DFV	0	0	0	0	0	0

Buttons at the bottom: **Cancel**, **OK & Next**, **OK**.

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

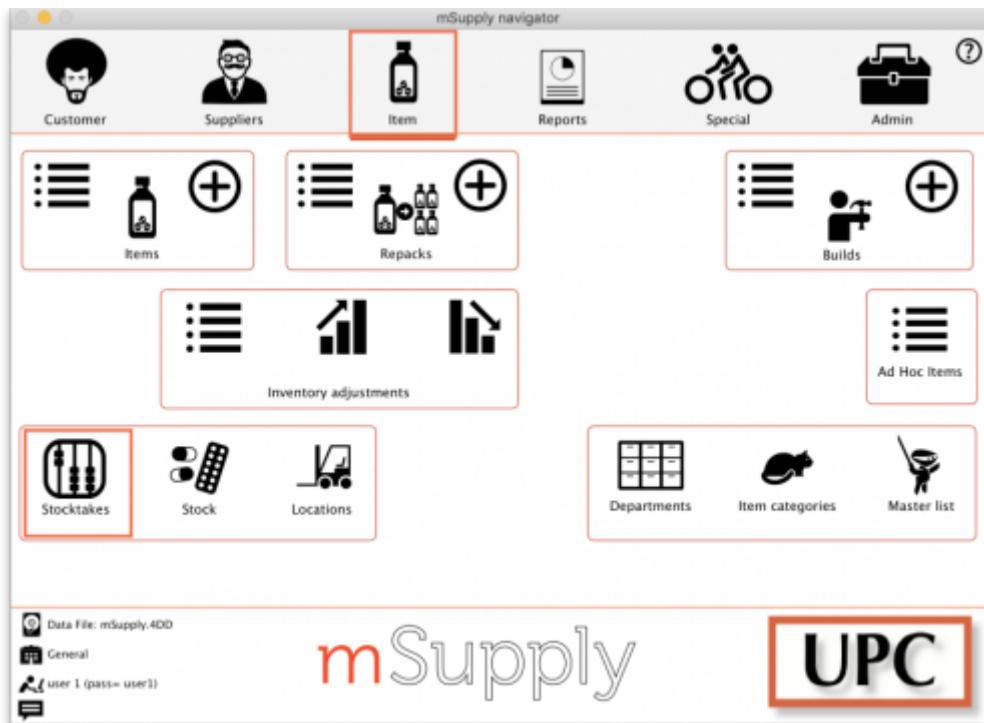
6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.



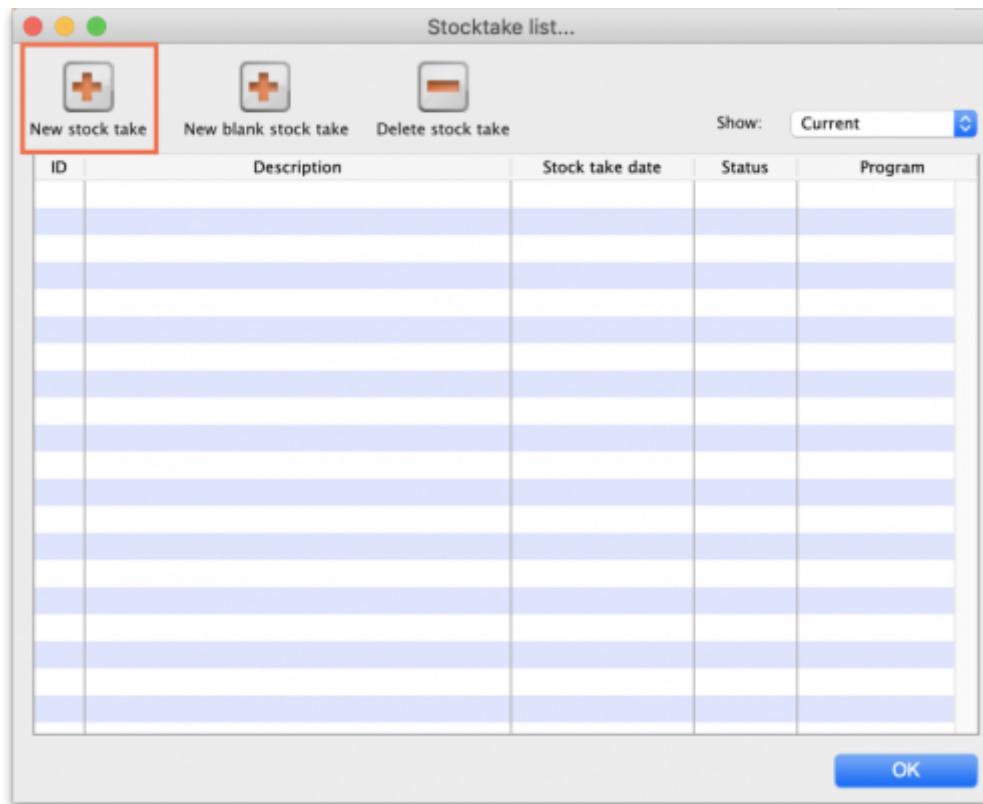
4.05.05. Creating a program stocktake

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:

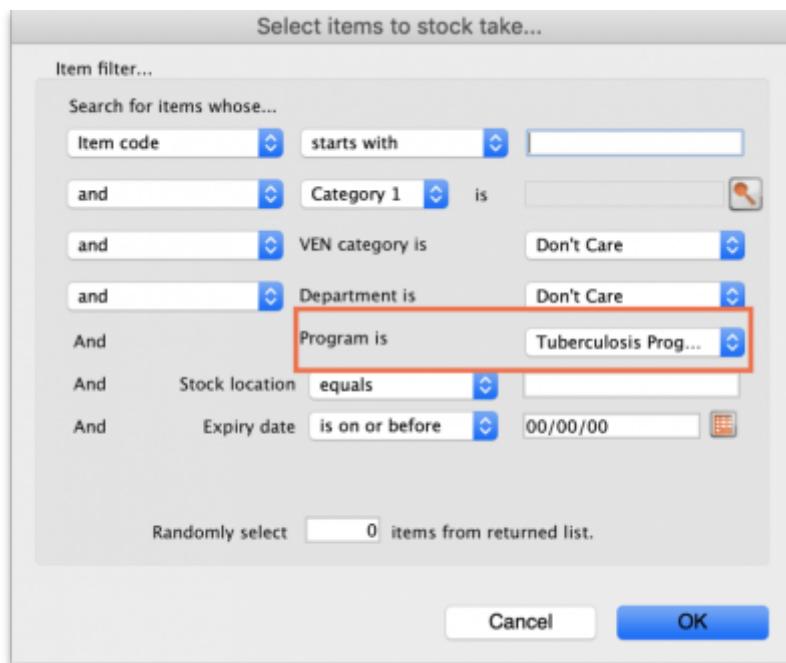
1. Navigate to the **Item** tab and click the **Stocktakes** icon:



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:

Previous: [4.04. Item master lists](#) | | Next: [4.06. Stock locations and location types](#)

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Last update: **2021/04/28 11:16**

