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:

Supply navigator ā +Ŀ Ad Hoc Iten inventory adjustments 9 Departments Item catego Locations Data File: mSupply.400 mSuppl **m** 00 21

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

•••	Item M	laster lists	
Add master		Duplicate	Report
list	list	master list	
Tuberculosis		iption	^
Tuberculosis	riogram		
			ОК

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

	Tuberculosis Program					
Note						
- A	utomatically add new items to this mast	er list				
	Items	In use by	Tags Prog	ram Settings		
+	- 5	6	1		[.
Add item	Delete Item(s) Save Sort order	Copy t	o clipboard		Impo	ort item list
Code	ltem name	Unit	Item departm	Item category	Imprest Quan	Price
r1i7p4t	Rifamp 150mg, isyrazin 400mg tab	ea		6.6.1 Adicines	400	0
rli1p5t	Rifamp. 150mg,yrazin 500mg tab	ea		6.6.1 Adicines	250	0
ri1is1t	Rifampicin 150miazid 150mg tab	ea		6.6.1 Adicines	500	0
ri1is7t	Rifampicin 150mniazid 75mg tab	ea		6.6.1 Adicines	300	0
rif150t	Rifampicin 150mg tab/cap	ea		6.2.3 Adicines	200	0
ri3is1t	Rifampicin 300miazid 150mg tab	ea		6.6.1 Adicines	400	0
rif300t	Rifampicin 300mg tab/cap	ea		6.2.3 Adicines	500	0
is1et4t	Isoniazid 150mgol hcl 400mg tab	ea			600	0
iso300t	Isoniazid 300mg tab	ea			300	0
eth400t	Ethambutol hydrochloride 400mg tab	ea		6.6.1 Adicines	500	0
pyr400t	Pyrazinamide 400mg tab	ea			500	0

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

			Add item m	aster list			
Description Test master l	st					Created date: 17/10	/2024
Note						Created by: mSup	ply Support
	er list is a par	items to this master list sient list					
		Items	In use by Tags	Program Sett	ings		
This master list is a program	n	HIV program		Immunit	sation program		
eLMIS integration code							
igram tags							-
Tag Period schedule		¢ 0					
Order types							
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency	+
							=
gimen data							
Code	N	ame		Туре		Default	+
				OK & Previou	OK & Next	Cancel	ОК

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

- 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 Sutton.
- 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 **[11]**. 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):

•••		
Description Tuberculosis	Program	
Automatically a	dd new items to this master list Items In use by Tags Program Settings	
eLMIS integration con	5e	•
Tag Period schedule Order types	TBprogram C	

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.

	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS				
r	Order type	1	3.0	5	1.0	1	•		
	Order type	1	3.0		1.0				
	-								
en da	ta								
	Code	Name	Type	Default	Is Req	uired?			
							+		
							_		
					-				

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 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 ma	aster list			
Description Test master	list					Created date: 17	10/2024
Note						Created by: mS	upply Support
 This mas 	cally add new ter list is a pat price list	items to this master list ient list					
		Items In	use by Tags	Program Sett	ings		
This master list is a progra	m	HIV program			ation program		
eLMIS integration code							
rogram tags							<u>+</u> =
Tag			R.				
Period schedule							
Order types							
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency	+
egimen data							
Code	N	ume		Туре		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 $\ensuremath{\textbf{Special}}$ tab and click on the $\ensuremath{\textbf{Stores}}$ icon:

0 🔴 0		mSupply na	vigator		
Customer	Suppliers	litern	Reports	OTTO Special	Admin (2
Currencies	Reminders	Contact	s	L	A Warnings
Prescribers	Merge prescribers				
Misc labels	Cash Register	Stores	I		Transaction categories
Data File: mSupply.40 Ceneral Ceneral Ceneral	° n	nSup	ply	1	UPC

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*.

0		Edit	store			
General Warehouse						
	General Preference	is Logo Vis	ibility Custom fields	Master lists		
Store code GEN	store	0				
Name General Wareho	LIE		Disable this s	tore		
Organization name Address line 1			esponsible officer none	•		
Address line 2						
Address line 3						
Address line 4			n			
Address line 5			View name associa			
Postal/Zip Code			this store			
Phone		_				
Taga TBprogram	m x					
		-				
		_				
					Cancel	OK

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

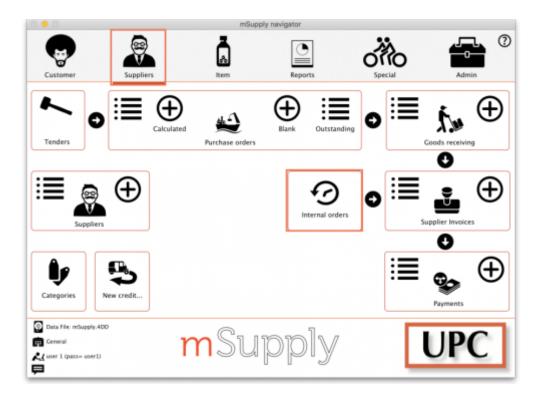
List	Use master list	
Tuberculosis Program	0	

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:

rder type Pro	gram O General O	
rder details		
Program	Tuberculosis Program	
Requisition type	Normal order	
Supplier	First, enter a supplying store name	
Period	January 2020	
	Start date 1/1/20	
	End date 31/1/20	

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:

Order dat Program Order typ Perio	Control Medical Spore E22/30/19 Tobercollesia Program Begular Assumer 2020 X/2/20 Tor 31/1/20 Deem name	CMS Filter		Rafere Comm Has N Threshold N ter by Rem Far	ent 105 3.0 105 1.0		dx over threshold	Print	ID : 5 Status : sg Type : request Every clase : 22/15/19 Emered by : user 1 (pass= Store: General
Program Order typ Perio From	Tuberculesis Program e Regular d Jamaany 2020 1: 1/1/20 To: 31/1/20	Filter		Has N Threshold N or by here run	HDS 3.0 HDS 1.0				Type : request Energ date : 22/10/19 Entered by : user 1 (pass=
Order tap Perio From	e Regular d January 2020 : 1/1/20 To: 31/1/20	Filter		Threshold N	HDS 1.0				Entry date : 22/10/19 Entered by : user 1 (pass=
Perio	d January 2020 : 1/1/20 To: 31/1/20	Filter		ier by item na	ne or code				Entered by : user 1 (pass=
From	: 1/3/20 Te: 31/1/20	Filter							
		Filter						Print	Store: General
L. Item code	Them cauma			Data	100				
	Page cares			Data					
i Item code	ten nere					Custors	663		
i Item code	them mame		Our	Average			User		
	Later in sale of	Unit	stock	monthly		Calculated quantity	requested	Comment	
			hand	consump			quantity		
1 r1/7p48	Rifamp 150mg, isyrazin 400mg tab	ea	-	0 0	0		20		
2 rtite5t	Rifamp. 150mg, is pyrazin 500mg tab	ea.		0 0	0		30		
3 clis1t	Rifampicin 150mgoniazid 150mg tab	62		8 O	0		40		
4 rillia7t	Rifampicin 150msoniazid 75mg tab	44		0 0	0		100		
5 ef150t	Rifampicin 150mg tab/cap	ea		0 0	0		50		
6 #3is1t	Rifampicin 300mgoniazid 150mg tab	ea.		0 0	0		60		
7 rf300t	Rifampicin 300mg tab/cap	44		0 0	0		100		
8 in1et4t	Isoniazid 150mg +tol hcl 400mg tab	44		0 0	0		100		
9 ise300t	Isomiazid 300mg tab	ea		D 0	0		80		
10 eth400t	Ethambutol hydrochloride 400mg tab	62		0 0	0		50		
11 pyr400t	Pyrazinamide 400mg tab	44		0 0	0		70		

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

Order date 24/ Program HIV Order type Ord Period DEC From : 1/1	er type IMBRE 2018	Black 12/18	Comment Max MOS 1 Threshold MOS 1	Status : n Type : n Entry date : 2 Entered by : A Store: n	equest 4/01/20 dmin			
			Data entr	y Log Industors				
Name Regimen Data Name	Code Regimen Code1	Valeur			Commentaire			
Description	Code		Patients enfants requi	Patient stable adulte ~		Nouvelle inclusion ad		
Régime A. Are Ligne Régime A. Are Ligne	AZT/3TC/NVP AZT/3TC/BPV	0	0	0	0	0	0	0
Régime Aère Ligne	AZT/STC/TDP	0	0	0	0	0	0	0
Régime A., ère Ligne	AZT/STC/LPV/r	0	0	0	0	0	0	0
Régime A., ère Ligne	TDF/3TC/EFV	0	0	0	0	0	0	0
Régime Aère Ligne	TDF/3TC/LPV/v	0	0	0	0	0	0	0
Régime Aère Ligne	AZT/3TC/ABC	0	0	0	0	0	0	0
Régime Aère Ligne	ABC/3TC/NVP	0	0	0	0	0	0	0
Régime Aère Ligne	ABC/3TC/UPV/r	0	0	0	0	0	0	0
Régime A., ère Ligne	ABC/3TC/EFV	0	0	0	0	0	0	0
						Cancel	OK & Next	OK

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

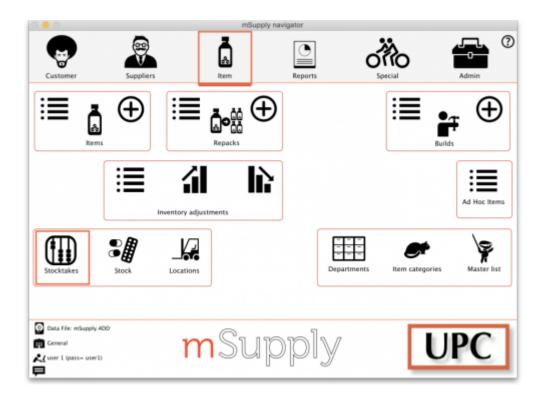
6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.

Supplier	Central Medical Stares	CMS		Refere	ace.				ID : 5	
Order date	32/10/19 Black			Carren					Status : sp	
	Tuberculosis Program			Max N	05 3.0				Type : re	quest
Order type Regular		Threshold MOS 1.0 Hide stock over threshold						Entry date : 22/10/19		
Period	ianuary 2020			Threshold N	05 1.0	Phote saloc	k over threshold	· 👝	Entered by Luc	er 1 (passe)
	1/1/20 Te: 31/1/20	Film	anna Ett					Print	Store: G	-
	10. 10. 10.			_	_				June G	
				Oara	ertry Log	Custom	data			
u Item code	bern name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity	Comment		
1 r1(7p4t	Rifamp 150mg, is anapin 400mg tab		(0 0		0	20			
2 111051	Rifamp. 150mg, ispyrazin 500mg tab	68	(0 0	0	0	30			
3 rilis3t	Rifampicin 150mgoniazid 150mg tab	68	6	0 0	0	0	-40			
4 rilia7t	Rifampicin 150msoniazid 75mg tab	**	(0 0		0	300			
5 r#150t	Rifampicin 150mg tab/cap	68	(0 0	0	0	50			
6 ri3is31	Rifampicin 300mgoniazid 150mg tab		(0 0	0	0	60			
7 r#300t	Rifampicin 300mg tab/cap	48	(0 0	0	0	300			
8 islet4t	Isoniazid 150mg + tol hcl 400mg tab		(0 0		0	300			
9 (148) 30000	Isoniazid 300mg tab	68	(0 0	0	0	80			
10 eth400t	Ethambutol hydrochloride 400mg tab	68	(0 0	0	0	50			
11 per400t	Pyrazinamide 400mg tab	45	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:



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

+					
ew stock tak	e New blank stock take	Delete stock take		Show:	Current
ID	Description		Stock take date	Status	Program

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:

Search for	items whose				
Item code	e ᅌ	starts with	٥		
and	0	Category 1 ᅌ	is		
and	0	VEN category is		Don't Care	
and	0	Department is		Don't Care	
And		Program is		Tuberculosis Prog	
And	Stock location	equals	٥		
And	Expiry date	is on or before	0	00/00/00	
	Randomly select	0 items fro	om reti	urned list.	

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:

v stock take Ne	w blank stock take Delete st	ock take	Show:	Current 😒
D	Description	Stock take date	Status	Program
2 22/10/19 Stoc		22/10/19	fn	Tuberculosis Program
3 22/10/19 Stocktake		22/10/19	fn	
_				

Previous: 4.04. Item master lists | | Next: 4.06. Stock locations and location types

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