# 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.

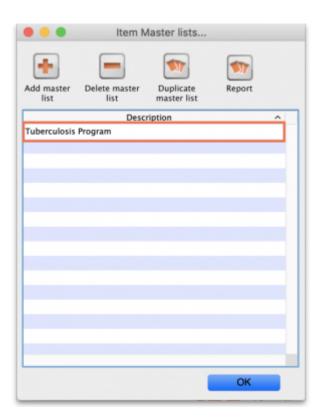
Examples of items commonly managed by programs include Malaria, HIV and TB medicines and medical supplies.

# 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:

rescription	Tuberculosis Program					
Note						
	utomatically add new items to this mast	er list In use by	r Tags Prog	ram Settings		
•	- 5	(	<b>1</b>		[	<b>-</b>
Add item	Delete Item(s) Save Sort order		o clipboard		Imp	ort item list
Code	ltem name	Unit	Item departm		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 ma	aster list			
Description Test master	list					Created date: 17/	10/2024
Note						Created by: mSu	apply Support
<ul> <li>This mas</li> </ul>	ically add new ster list is a pat t price list	items to this master list ient list					
		Items   I	use by Tags	Program Sett	ings		
This master list is a progra	am.	HIV program		Immunia	sation program		
eLMIS integration code							
rogram tags							<u>+</u> =
Tag Period schedule		¢	F				
Order types Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency	
							÷
Regimen data							
Code	N	ame		Туре		Default	
							+
							-

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 without 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 **[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 at	dd new items to this master list Items In use by Tags Program Settings	
eLMIS integration cod		•
Tag Period schedule Order types	TBprogram C V Monthly	

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	4	•		
	Order type	1	3.0		1.0				
	-								
ien dat	ta								
	Code	Name	Type	Default	t Is Re	quired?	+		
							_		
								Cancel	0

#### 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 m	aster list			
Description Test master	rlist					Created date: 17/	10/2024
Note						Created by: mSu	pply Support
This ma	tically add new ster list is a pat It price list	items to this master list ient list					
		Items Ir	use by Tags	Program Sett	ings		
This master list is a prog	ram	HIV program		Immunia	ation program		
eLMIS integration code							
Program tags							* =
Tag			T.				
Period schedule							
Order types							
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency	+
							9
							_
Regimen data							
Code	N	ume		Туре		Default	-
							+
							-
							_
				OK & Dawlow	OK & Next	Ormert	04
				OK & Previou:	UN & 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:

		mSupply navigator		
Customer	Suppliers	litern Rep	ants Special	Admin (?
G G Currencies	Reminders	<b>ሰሳት</b> Contacts		Warnings
Prescribers	Merge prescribers			
Misc labels	Cash Register	Stores		Transaction categories
Data File: mSupply.4D General ( user 1 (pass= user1)	٣	Supp	ly	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*.

• • •				Edit store				
General Warehouse								
	General	Preferences	Logo	Visibility	Custom fields	Master lists		
Store code GEN	store		3					
Name General Warehout					Disable this s	tore		
Organization name					e officer none	B		
Address line 1				Responsion	e pricer hore			
Address line 2								
Address line 3								
Address line 4					Ē			
Address line 5					View name associa			
Postal/Zip Code					this store			
Phone								
Tags								
Toprogram	•							
1								
							Cancel	ОК

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

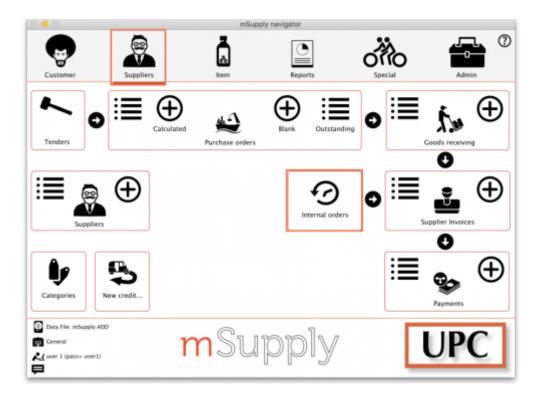
List	Use master list	
Tuberculosis Program		

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:

Order type	New internal	order	
Pro	gram O	General	
Order details			
Program	Tuberculosis P	rogram	0
Requisition type	Normal order		0
Supplier	First, enter a su	pplying store na	me
Period	January 2020		0
	Start date	1/1/20	
	End date	31/1/20	
	(	Cancel	ок

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		Raferer	nee .				0:5
	Order date				Comm					Status   50
										Type : request
		Tuberculesis Program			Han M	IOS 3.0				
6	Order type				Threshold M	05 1.0	Hide stor	k over threshold	<b></b>	Entry date : 22/10/19
		January 2020							_	Entered by : user 1 (pas
	From :	1/1/20 Tec 31/1/20	Filter	items (11)	r by item nan	ne or code			Print	Store: General
					Data	HELY LOG	Custore	data		
-		1		Our	-					
	tem code	item name	Unit	on hand	Average monthly consump	Meeths of stock	Calculated quantity	User requested quantity	Comment	
1 (1)	7948	Rifamp 150mg, isyrazin 400mg tab	ea		0	0		20		
2 11	12454	Rifamp. 150mg, is pyrazin 500mg tab	44	4	0	0		30		
3 40	listr	Rifampicin 150mgoniazid 150mg tab	62	6	0	0		40		
4 #0	lin7t	Rifampicin 150msoniazid 75mg tab	44		0	0		100		
5 ef	1508	Rifampicin 150mg tab/cap	ea		0	0		50		
6 43	listr	Rifampicin 300mgoniazid 150mg tab	44	4	0	0		60		
7 ef	300t	Rifampicin 300mg tab/cap	44	6	0	0		100		
8 113	Let4t	Isoniazid 150mg +tol hcl 400mg tab	48		0	0		100		
9 100	03001	Isoniazid 300mg tab	ea	4	0	0	0	80		
10 et	h400t	Ethambutol hydrochloride 400mg tab	44	4	0	0		50		
11 py	10091	Pyrazinamide 400mg tab	44	4	0	0		70		

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

Name         Code         Valuer         Conversition         Conversition           Regimen Data Name         Regimen Code         Valuer         Conversition         Conversition	Order date (24/ Program HIN Order type Ord Period DEC From : 1/1	er type XIMBRE 2018	Black 12/18	Comment Max MOS 1 Threshold MOS 1		threshold		Status : n Type : n Entry date : 2 Entered by : A Store: n	equest 4/01/20 Idmin
Regimen Data Name         Regimen Code1         0           Description         Code         Patients adultes regar         Patients sentials adulte = v         Patient stable enfant         Nouvelle inclusion en.         6           Regimen Are Ligne         AZT/ITIC/INVP         0			11 miles	Data entr	y Log Industors				
Ragine A. Are Ligne         AZT/17CL/NP         0						Commentant			
Ragine A. Are Ligne         AZT/17CL/NVP         0 <th< th=""><th>Receivedant</th><th>64</th><th>being at he are</th><th></th><th>Print with state -</th><th>Berland stability and ad</th><th>Mercella indusion of</th><th>Name and a local sector of the</th><th></th></th<>	Receivedant	64	being at he are		Print with state -	Berland stability and ad	Mercella indusion of	Name and a local sector of the	
Najmer A. Jer Lipse         APT/17C(1FV)         0 <th< td=""><td></td><td></td><td></td><td>Patients enfants reçus</td><td>Patient statile adulte ~</td><td></td><td>Nouvelle inclusion ad.</td><td></td><td></td></th<>				Patients enfants reçus	Patient statile adulte ~		Nouvelle inclusion ad.		
Régime A. Arte Ugime         APL/11C/T07F         0 </td <td></td> <td></td> <td>0</td> <td>ö</td> <td>0</td> <td></td> <td>ō</td> <td></td> <td></td>			0	ö	0		ō		
Régime AInt Ligne         AZT/3TC(LPN)*         0         <			0	0	0	0	0	0	
Nagime A. Are Uppe         TOF/JTC/EFV         0         0         0         0         0         0           Nagime A. Are Uppe         TDF/JTC/EFV         0				0	0	0	0	0	
Naigime A. Jerk Ligne         TDF/317C/LPVyr         0				0	0	0	0	0	0
Ragime A. Jire Ligne ALC/ITC/LIV/F 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		TDF/3TC/LPV/v	0	0	0	0	0	0	0
Raigime A. Jim Ugen AC(3TC(3VC) 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			0	0	0	0	0	0	0
	Régime A., ère Ligne	ABC/3TC/NVP	0	0	0	0	0	0	0
Regime A. Are Ligne ADC/37C/07V 0 0 0 0 0 0 0 0 0	Régime A ère Ligne	ABC/STC/UPV/r	0	0	0				0
	Régime A., ère Ligne	ABC/3TC/EFV	0	0	0	0	0	0	0

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

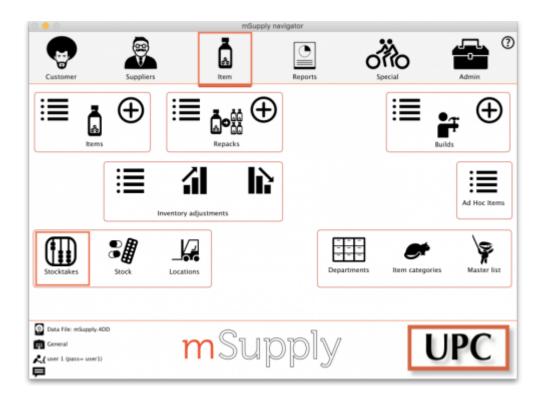
6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.

Oxder date         22/10/10         Mack         Camment         Status: 19           Program:         Tabencholisis Program:         Max 805: 1.0         Here status: 27/10/10         Tabencholisis Program:         Max 805: 1.0         Tabencholisis Program:	Order date 2		CMS		Referen	sce				1D : 5
Internet internet view financial         Maximum view view view view view view view view		2/10/19 Black			Camera	28.8				Status : sg
Inters code         Barn name         Ust Ust Name         Average bits         Months of stack         Calculated (stack)         Ust Ust Ust Manuficity         Average Instantial (stack)         Ust Ust Ust Ust Ust Ust Ust Ust Ust Ust	Order type Ri Period ja	legular anwary 2020	Filter	Rems 🖂	Threshold M	05 1.0	Hule stor	k over threshold	First .	Entry date : 22/10/19 Entered by I user 1 (passe u
L.         Berry Code         Berry Code         String Description         Monthy Description         Calculated Based         Description         Comment Description           1         1/17/4         Refamp 150mg, h., system 406mg tab         es         0					Data	entry Log	Custom	data		
2         r/11p51         REarep. 158mg, is. pytates 500mg tab.         e.s.         0         0         0         30           1         ni.a1         Rearep. 158mg, is. pytates 500mg tab.         e.s.         0	Li Item code	item name	Unit	stock on	monthly			requested	Comment	
I (18:3)         REarryice: 156mg, onizatil 156mg tab         ea         0 <td>1 r107p4t 0</td> <td>lifamp 150mg, is snapin 400mg tab</td> <td></td> <td>0</td> <td>0</td> <td></td> <td>0</td> <td>20</td> <td></td> <td></td>	1 r107p4t 0	lifamp 150mg, is snapin 400mg tab		0	0		0	20		
4 initia?t         8 flampicin 158msamiatid 75mg tabl         es         0         0         0         200           5 initi39         Ritampicin 158mg tabl (appsamiatid 75mg tabl)         es         0         0         0         500           6 initia1         Ritampicin 158mg - unatud 158mg tabl (appsamiatid 158mg tabl)         es         0         0         0         500           7 initi38         Ritampicin 158mg - unatud 158mg tabl (appsamiatid 158mg tabl	2 111051 8	ltfamp. 150mg, ispyrazin 500mg tab	68	0	0	0	0	30		
S r/13 bt         Rfample/in 138mg tab/rag         es         0         0         0         50           6/ ritis1         Rfample/in 108mg tab/rag         es         0         0         0         60           7/ r350s         Rfample/in 108mg tab/rag         es         0         0         0         200           8/ nb44t         Interaction 135mg tab/rag         es         0         0         0         300           9/ ra350s         Interaction 135mg tab/rag         es         0         0         0         300           9/ ra350s         Interaction 135mg tab/rag         es         0         0         0         300           9/ ra350s         Interaction 135mg tab/rag         es         0         0         0         300	3 rilis3t 8	Rfampicin 158mgoniazid 158mg tab	68	0	0	0	0	40		
6 (1163)         REfamplien 100mg unbitage         6 a         0         0         0         0         0           7 (r/300)         Refamplien 100mg unbitage         es         0	4 rilia7t R	Efampicin 150msoniazid 75mg tab	**	0	0		0	100		
7         10/300         REamploid 300mg tab) (tag)         es         0         0         0         300           8         10.844         Insertaid 315mg 4tall Holdberg tab         es         0         0         0         300           9         1x83000         Insertaid 300mg tab)         es         0         0         0         300           0         44000         E         0         0         0         300           0         44000         E         0         0         500	5 r#150t A	Rifampicin 150mg tab/tap	68	0	0	0	0	50		
B in berkeid 130-mg sa. msi hol 400 mg tab         es         0         0         0         200           9 in 3000         isseritati 300-mg tab         es         0         0         0         200           0 in 9000         isseritati 300-mg tab         es         0         0         0         50           0 in 9000         isseritati 300-mg tab         es         0         0         50         50	6 (1316.31 8	Efampicin 300mg. oniazid 150mg tab		0	0	0	0	60		
9 ise300k isoniazid 300mg lab es 0 0 0 0 0 0 20 ed+400k ilihambutal hydrochloride 400mg lab es 0 0 0 0 0 50	7 r#300t R	Rifampicin 300mg tab/cap	4.5	0	0	0	0	390		
20 ePH001 Ethambusi hydrochloride 406mg tab ea 0 0 0 0 0 50	Sinbet4t it	soniazid 150mg + tol hcl 400mg tab		0	0		0	100		
	9 114 3000	soniazid 300mg tab	68	0	0	0	0	80		
11 pp=400t Pprzshumide 400mg tab es 0 0 0 0 70	10 eth4001 (8	Ethambutol hydrochloride 406mg tab	68	0	0	0	0	50		
	11 per400t P	Pyrazinamide 400mg tab	65	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 take	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 f	or items whose				
	_		_		
Item co	de ᅌ	starts with	0	1	
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	J
And	Stock location	equals	0		
And	Expiry date	is on or before	٢	00/00/00	
	Randomly select	0 items fr	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:

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

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

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