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:

<sup>Supplers
Image: Suppler and gator

Customer
Supplers

Suppler
Image: Suppler and gator

Suppler
Image: Suppler and gator

Image: Suppler
Image: Suppler and gator

Image: Suppler
Image: Suppler

Image: Suppler
<</sup>

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:

escription	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	item 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:

Description Test master I	ist					Created date: 17/1	0/2024
Note						Created by: mSug	oply Support
	er list is a par	items to this master list sient list					
		Items	In use by Tags	Program Sett	ings		
his master list is a program	n	HIV program		🗌 Immunis	sation program		
LMIS integration code							
gram tags							
ag eriod schedule		e 0					
irder types							
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency	
							+
							_
imen data							
Code	N	ame		Туре		Default	
							1
							-
							_

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 Subutton.
- 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 **I**. 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). Note, 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 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 the periods up first):

•••							
Description Note	Tuberculosis Pr	ogram					
	itomatically add		to this mas	Tags	Program Sett	ings	
	ster list is a pro	gram					•
Tag Period s Order ty		TBprogram Monthly	n	0			

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.

e	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency			
er	Order type	1	3.0	5	1.0	1			
	Order type	1	3.0		1.0				
							-		
	-								
imen da	ta								
	Code	Name	Type	Default	ls Re	quired?			
							+		
							-		
							_		
							_		
					-				
								Cancel	OK

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:

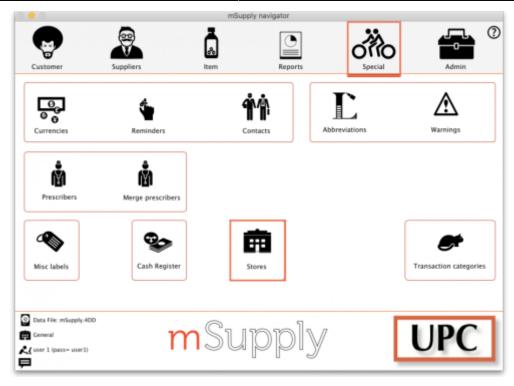
- Open the program via the **Master List** (Click on the **Master list** icon on the *Item* tab of the Navigator).
- Click on the **Program Settings** tab.
- In the **Regimen Data** table add fields for the data that should be provided to the supplier with each program requisition e.g. the number of 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.

Note Discount % 0						Created date: 17/1/	
Discount % 0						Created by: mSug	ply Support
Discount /4							
		items to this master list					
	ter list is a par price list	ient list					
_ 6 Octable	price and						
		Items	In use by Tags	Program Sett	ings		
This master list is a progra	m	HIV program		Immunit	sation program		
eLMIS integration code							
ogram tags							± =
Tag		•					
Period schedule							
Order types							
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency	+
egimen data							
Code	N	ате		Туре		Default	
							+

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*.

• •						Edit store				
neral Warehouse										
			General	Preferences	Logo	Visibility	Custom fields	Master lists		
Store	code G	EN	store		3					
N	lame G	eneral Warehout					Disable this s	tore		
Organization n	ame							•		
Address li	ne 1					Responsibi	e officer none			
Address li	ne 2									
Address li	ne 3									
Address li	ne 4						n			
Address li	ne 5									
Postal/Zip G	Code						View name associa this store			
Pf	hone									
F	Tags									
		TBprogram	x							
		1								
										_
									Cancel	OK

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

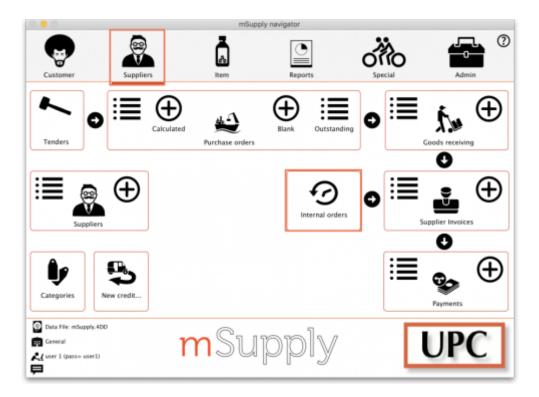
		ogo maonity	Custom fields	Second States		
	пате		U			
Tuberculosis Prop	pram					
				_		
				_		
				_		
		List	List	List name U	List name Use master list	List Use master last

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
	ogram O General O
Order 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
	Cancel OK

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:

					Edit req	uisition			
Supplie	Central Medical Stores	CMS		Refere	nce				10 : S
Order date	e 22/10/19 Black			Comm	ent				Status : sg
Program	Tuberculesis Program			Mar I	105 3.0				Type : request
Order tup	-								Entry date : 22/10/19
	January 2020			Threshold N	HOS 1.0	Hide stoc	k over threshold	-	Entered by : user 1 (pass-
		-							
Prem	: 1/1/20 To: 31/1/20	Filter	itens	er by item na				Print	Store: General
				Data	HELY LO	Custom	data .		
Item code	ten name	Unit	Our stock on hand	Average monthly consump	Meeths of stock	Calculated quantity	User requested quantity	Comment	
3 117948	Rifamp 150mg, isyrazin 400mg tab	ea		0 0	0	0	20		
2 rtitest	Rifamp. 150mp, is., pyrazin 500mg tab	44		0 0	0		30		
3 clisit	Rifampicin 150mgoniazid 150mg tab	44		0 0	0		40		
4 #3ia7t	Rifampicin 150msoniazid 75mg tab	44		0 0	0		100		
5 +11508	Rifampicin 150mg tab/cap	ea		0 0	0		50		
6 #3is1t	Rifampikin 300mgoniazid 150mg tab	44		0 0	0		60		
7 rf300t	Rifampicin 300mg tab/cap	44		0 0	0		100		
8 inlet4t	Isoniazid 150mg +tol hcl 400mg tab	44		0 0	0		100		
9 ise300t	Isomiazid 300mg tab	ea		0 0	0	0	80		
10 eth400t	Ethambutol hydrochloride 400mg tab	42		0 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:

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	Concession in the second			
Ragine A. Are Ligne AZT/17CL/NP 0						Commentant			
Ragine A. Are Ligne AZT/17CL/NVP 0 <th< th=""><th>Receivedant</th><th></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		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.

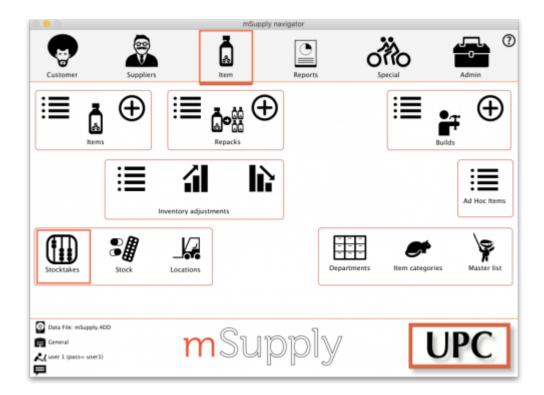
6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.

Prog Order Pr	date (22/10/19) take prem Tabencalosis Program type Regular miod (aneary 2020 own 1/1/20 Te: 31/1/20			Common Max M Threshold M	05 3.0				Status : sg Type : request
Onder Pa	type Regular mod January 2020								
		Filter	items 🖂	or by item nar	ne or code		k over threshold data	Print	Entry date : 22/10/19 Entered by I user 1 (passe- Store: General
Li Item o	ode Bern name	Unit	Our steck on hand	Average monthly consump		Calculated quantity	User requested quantity	Comment	
1 r1/7p4t	Rifamp 150mg, is yrazin 400mg tab		(0 0	0	0	20		
2 111051	Rifamp. 150mg, ispyrazin 500mg tal	6 68	(0 0	0	0	80		
3 rilis3t	Rifampicin 150mgoniazid 150mg tal	68	(0 0	0	0	40		
4 rilin7t	Rifampicin 150msoniazid 75mg tab		(0 0		0	100		
5 r#150t	Rifampicin 150mg tab/cap	68	(0	0	0	50		
6 ri3is31	Rifampicin 300mponiazid 150mp tal	6. 6.	6	0 0	0	0	60		
7 r#300t	Rifampicin 300mg tab/cap	4.5	(0 0	0	0	300		
8 islet4t	Isoniazid 150mg +tol hcl 400mg tab		(0 0		0	300		
9 144 3000	Isoniazid 300mg tab	68	(a a	0	0	80		
10 #844005	Ethambutol hydrochloride 400mg tab		(0 0	0	0	50		
11 pyr400t		**	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:

Stocktake list							
+	+						
New stock take	New blank stock take	Delete stock take		Show:	Current		
ID	Description		Stock take date	Status	Program		
					ОК		

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:

Canada fara la	ems whose				
Search for It	ems whose		_		
Item code		starts with	0		
and	0	Category 1 ᅌ	is		
and	٢	VEN category is		Don't Care	ł
and	٢	Department is		Don't Care	1
And		Program is		Tuberculosis Prog	1
And	Stock location	equals	0		_
And	Expiry date	is on or before	0	00/00/00	
Ra	indomly select	0 items fro	m retu	ırned 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:

•		Stockt	ake list		
w stock take	e New blank stock take	Delete stock take		Show:	Current
ID	Description		Stock take date	Status	Program
2 22/10/	/19 Stocktake		22/10/19	fn	Tuberculosis Program
3 22/10/19 Stocktake		22/10/19	fn		
_					
_					
					ОК

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

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