

# Chapter 24

## Budget Management Model

**This chapter—**

- Explains how the system can be used to manage budgets on behalf of demanders



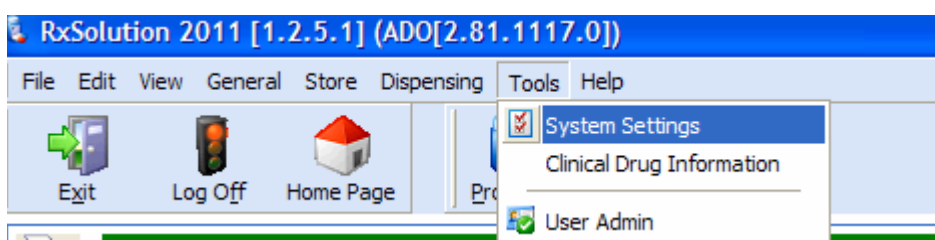
## What Is the Budget Management Model?

The budget management model is used when a District/ Regional office wants to order on behalf of a demander and receives the orders for financial purposes to budget the the Demanders under their supervision. For example, the district pharmacist's only tasks are to receive orders, capture them as Purchase orders on RxSolution after reviewing them for accuracy and appropriateness. The district pharmacist needs to monitor what the demanders request and how much they have spent.

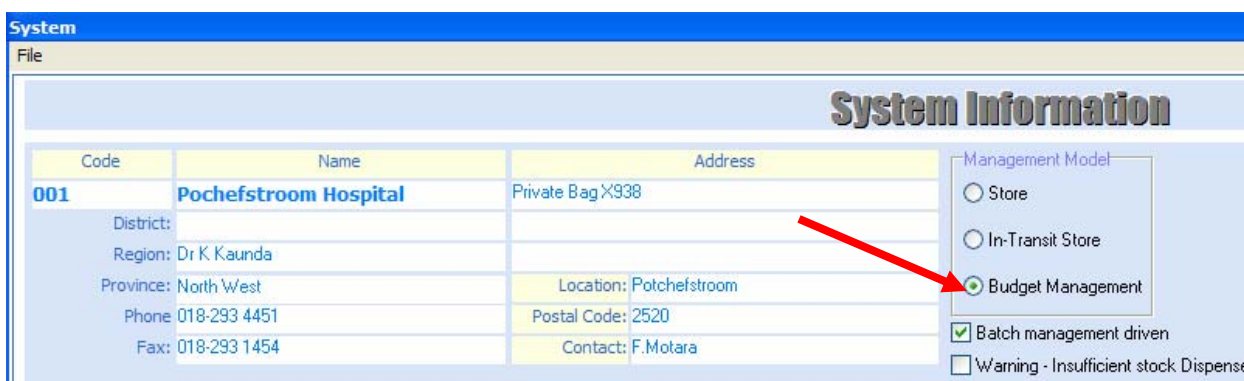
## Using RxSolution in the Budget Management Model

### *How Do I Define My Store as a Budget Management Store?*

1. In the RxSolution main menu, click on **Tools**, then **System Settings**.



2. In the top portion of the resulting **System Information** screen, click on the **Budget Management** option under **Management Model**.



3. Save the setting by clicking on the check icon  on the right side of the screen, and then close this screen.

### *How Do I Monitor the Budgets, Orders and Receipts of Demanders?*

If you are using RxSolution for budget management, you will receive orders from demanders, approve them, and place an order on their behalf from to the appropriate supplier. Then receive the order into the System , tracking the demander's spending. Follow the steps below to monitor the budgets of demanders.

1. When the demander sends you an order, enter it in RxSolution.
2. Choose Add all Demander Authorised Products (as set up in Demanders Chapter 10)

Purchase Order - Add/Edit/Delete Products

The screenshot shows the 'Purchase Order - Add/Edit/Delete Products' window. It has a 'Detail' tab and a 'Post this Order' button. Below the button is a menu with the following options:

- Add (Single Product) Ins
- Add (Auto Generate Purchase Order) Ctrl+U
- Add (Auto Generate Purchase Order for Group2) Ctrl+G
- Add (All Institutional EDL Products)
- Add (All Demander Authorized Products)
- Mark all as Complete Ctrl+M
- Change (selected Product) Ctrl+E
- Delete (selected Product) Del
- Delete (ALL Products) Ctrl+T
- Create Text File

3. The Items will appear which are applicable to the Selected Demander. You must enter both the Demander Stock on hand and the Order quantity for each item. The Demanders maximum and minimum (Reorder level) will be displayed to make a calculated decision on the validity the Demander has requested to be ordered. (See Orders in Chapter 7)

ICN	Description	Dem QOH	Min	Max	Qty Ord	Pack Cost	TOTAL	All Received	Qty Rec	Shipping ...
0598/28	Glibenclamide 5mg Tablet; 28 Tablet [PO]	-1	0	0	0	R 1.0800	R 0.0000		0	1
2260	Bismuth Subgallate Co 22.5/8.75/8.75/12.5/ Ointment	-1	80	200	0	R 20.2000	R 0.0000		0	1
0636/84	Methyldopa 250mg Tablet; 84 Tablet [PO]	-1	0	0	0	R 13.5700	R 0.0000		0	1
0695/28	Oestrogen Conjugated 0.625mg Tablet; 28 Tablet [PO]	-1	0	0	0	R 16.5400	R 0.0000		0	1
2772	Amoxicillin 250mg/5mL Suspension; 100 mL [PO]	-1	600	900	0	R 4.9230	R 0.0000		0	1
0632	Medroxyprogesterone 5mg Tablet; 30 Tablet [PO]	-1	64	86	0	R 46.7800	R 0.0000		0	1
2343/28	Fluoxetine 20mg Capsule; 28 Capsule [PO]	-1	0	0	0	R 2.8100	R 0.0000		0	1
0046	Gentamicin 80mg/2mL Vial; 2 mL [INJ]	-1	300	400	0	R 1.9070	R 0.0000		0	1
0186	Ergometrine 0.5mg Ampoule; 1 mL [INJ]	-1	0	0	0	R 3.7700	R 0.0000		0	1
0004	Amoxicillin 125mg/5mL Suspension; 100 mL [PO]	-1	600	900	0	R 3.2030	R 0.0000		0	1
5424	Aspirin Soluble 300mg Tablet; 14 Tablet [PO]	-1	3000	6000	0	R 1.6390	R 0.0000		0	1
0318	Co-Trimoxazole 240mg/5mL Suspension; 50 mL [PO]	-1	600	1200	0	R 2.1070	R 0.0000		0	1
0727/20	Vitamin A (Retinol) 50 000U Capsule; 20 Cap [PO]	-1	0	0	0	R 22.9600	R 0.0000		0	1
0594	Ferrous Sulphate Co 170mg Tablet; 28 Tablet [PO]	-1	2484	3312	0	R 2.0000	R 0.0000		0	1
0236	Naloxone 0.4mg/mL Ampoule; 1 mL [INJ]	-1	30	50	0	R 2.2970	R 0.0000		0	1
0139	Levonorgestrel, Ethinyl Estradiol, Triphasic (Triphasil)	-1	4000	6000	0	R 3.3560	R 0.0000		0	1
0625	Loperamide 2mg Tablet; 6 Tablet [PO]	-1	0	0	0	R 0.9200	R 0.0000		0	1
0550/28	Chlorpromazine 100mg Tablet; 28 Tablet [PO]	-1	0	0	0	R 5.7800	R 0.0000		0	1
5271	Cetrimide Chlorhexidine Conc Sol Solution, External; 1	-1	0	0	0	R 2.6560	R 0.0000		0	1
5431	Gliclazide 80mg Tablet; 28 Tablet [PO]	-1	1065	1420	0	R 5.3600	R 0.0000		0	1
0387	Phenytoin 125mg/5mL Suspension; 237 mL [PO]	-1	6	12	0	R 182.0600	R 0.0000		0	1
0384	Phenobarbitone, Vit B Co 16mg/5mL Syrup; 100 mL [F]	-1	9	12	0	R 26.5700	R 0.0000		0	1

4. Post the print the Order
5. Close the Order
6. After the stock is delivered to the demander, the demander must send you a copy of the invoice received for the products.

7. Open a new Receipt and use the invoice quantities to fill in the quantity received field. (See Chapter 8, Receipts.)
8. When it is completed, post the Receipt.

The products and costs from the Receipt are recorded for that demander in the system. The cumulative costs and issues are tracked by reports.