

HEALTH COMMODITIES MANAGEMENT PLATFORM (HCMP)

FACILITY LEVEL USER GUIDE

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INTRODUCTION

The Health Commodities Management Platform (HCMP) is a web-based tool that is aimed at promoting efficient commodity management at the facility, sub county & county levels.

HCMP Flowchart

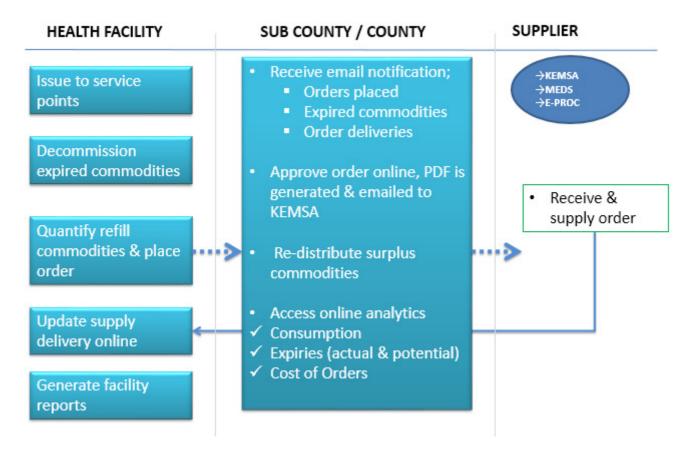


Figure 1 HCMP Flowchart

How to Start a Computer

Press the start button on the CPU tower and on the monitor as indicated below.

Wait for the computer to boot then log in with your username and password. Upon successful login, your computer will be ready to use.

Access HCMP

Click on your preferred web browser (*Google Chrome or Mozilla Firefox is recommended*). This can be done using the shortcut icon on your desktop or through the start menu.



Figure 2: Access your web browser

Access the HCMP system by typing <u>health-cmp.or.ke</u> on the address bar and press enter.



FiFigure 3: Access HCMP

Log In

A login page, as illustrated below will load prompting the user to enter the username and password.

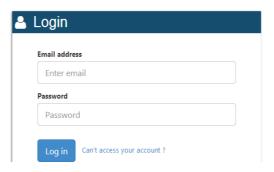


Figure 4 Login page

NOTE: The username & password will be given to you during field visits by the field coordinator and DPFs.

One is advised to change the password upon first login for security purposes.

HOMEPAGE

The home page will load to display the following:

Top Menu

This is at the top right side of the screen. It will guide the user through the list of views for orders, issues, reports, evaluation and commodity list.

Notifications

It provides timely information to the user on orders pending approval, orders pending dispatch, potential expiries and actual expiries of commodities.

Actions

It indicates the day to day processes that take place in the facility in regards to commodities.

Note: On first run the actions tab will be blank. The graph will also be empty since the system has no commodities.

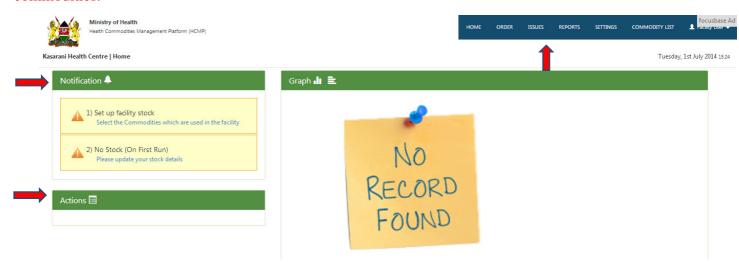


Figure 5 Homepage

On First Run

Setup Facility Stock

This is the first action performed on the system. Click **Settings** on the top menu as shown below:



Figure 6 Top menu

The dialogue box below will then appear. Choose the **Set Up Facility Stock** option



Figure 7 Settings tab

Setting up facility stock data can also be done by clicking **Set Up Facility Stock** on the notification area



Figure 8 Set up facility stock

The page below will appear enabling the user to select all the drugs used in the facility.

Specify the Average Monthly Consumption for each commodity. The total u

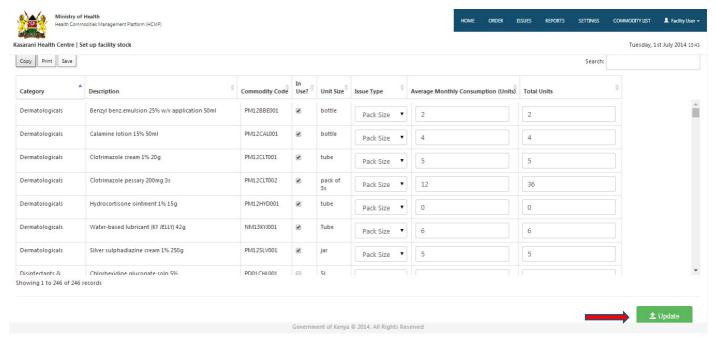


Figure 9 Set up facility stock

Click the **Update** button at the bottom right of the screen button to save the changes nnce the setup is complete.

The copy, print and save options are at the top left of the screen:

Copy Option

This option will prompt a popup notification displaying a specific number of rows in the table that have been copied on the clipboard.

Print Option

This option will prompt a print view of the table.

Save Option

This option will prompt the user to select the preferred format for saving this data, i.e. CSV, Excel or PDF.

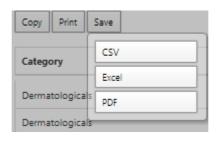


Figure 10: Save option

Select the preferred file format. The browser will prompt the user to specify the location where the file will be saved.

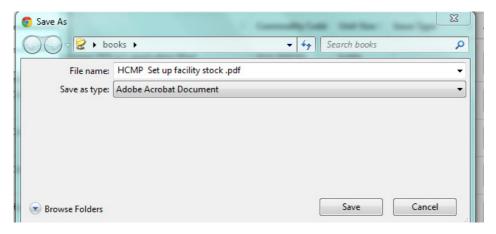


Figure 11 Save selected format

Update Stock Details

Click on the **Please Update Your Stock Details** on the **Actions** tab as shown below to update the physical stock details for each commodity that the facility has.

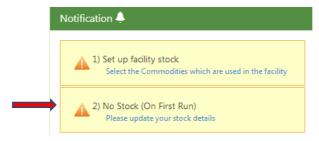


Figure 12 Update stock details

From the page that loads, the user will be required to select a commodity from the drop down on the description column & input the specifics that follow under each column.

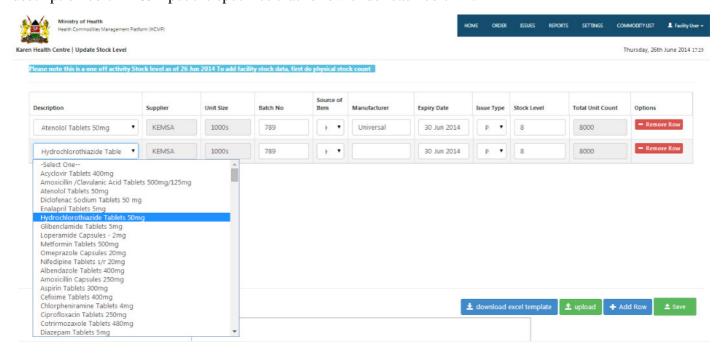


Figure 13 Update facility stocks

The total unit count will auto-calculate by computing the product of the unit size and the stock level value that was input in packs.

Click the Save button to save the details.

The Upload button shown allows the user to upload the stock details from an excel file if available.

Note: This task is available only on first run, after which it disappears.

The Homepage will load with more actions as shown below:

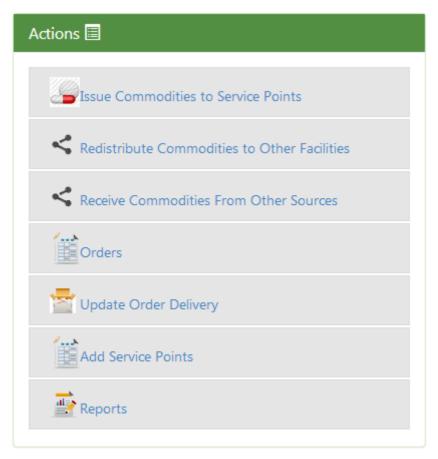


Figure 14 Action items

Add facility stock data

Click on the **Settings** option on the top menu and choose the **Add Facility Stock** option.



Figure 15 Add facility stock data

The page will load enlisting commodities that are available in the facility as previously entered.

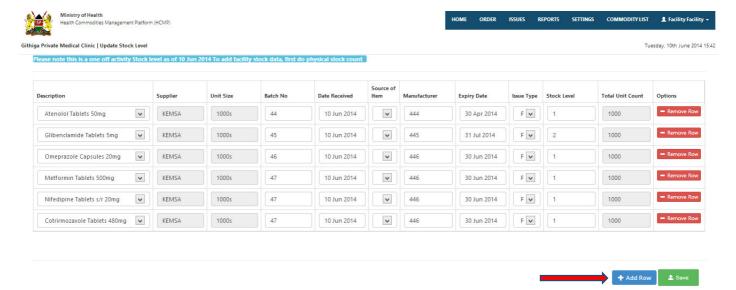


Figure 16 Add facility stock data

Click on **Add Row** to provide a new row.

Select a commodity from the dropdown. Key in the batch number, date received, and source of the item, manufacturer, expiry date, issue type and stock level.

The supplier and the unit size fields are auto generated. The total unit count is generated with reference to the available stock level entered by the user.

Click the **Save** button to save the changes.

Edit facility stock

Click on settings on the menu tab and select Edit facility stock data from the dropdown.



Figure 17 Edit facility stock data

This loads the screen below which contains a list of available stock.

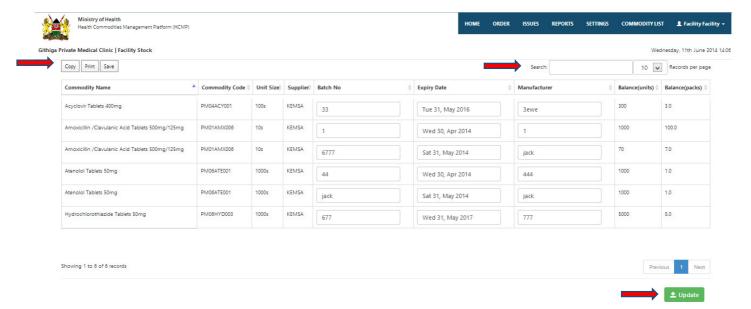


Figure 18 Edit facility stock data

The search bar that is available at the top-right of the page enables the user to search for a specific record on a commodity for viewing or editing.

Click the **Update** button on the bottom of the screen to save the changes.

A green pop up screen will load informing the user that the information has been updated.

The copy, save and print options will be accessible as explained previously.

ISSUE COMMODITIES

Click on the Issue Commodities link under the Actions tab.



Figure 19 Issue commodities tab

The issue commodities screen will be loaded allowing the user to select the issue specifics i.e. service point, commodity (the supplier, unit size & batch number will pre-populate once the commodity is selected).

The batch numbers will be loaded on a First In First Out queuing principle. Select the specific batch number being issued. The selected batch number's expiry date will auto-load.

Specify the quantity of issue (in packs) & the date of issue.

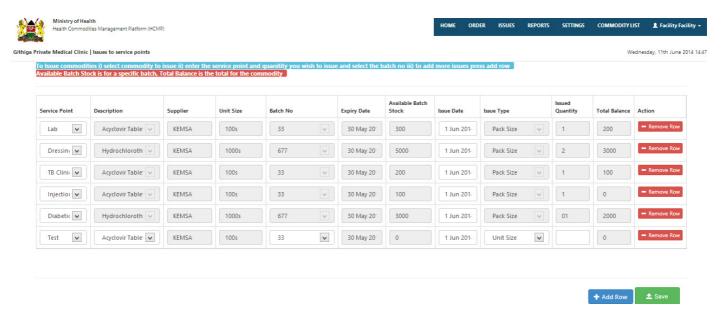


Figure 20 Issue commodities

Click on **Save** button. and confirm the values. A confirmation prompt will load requesting the user to confirm the details entered.

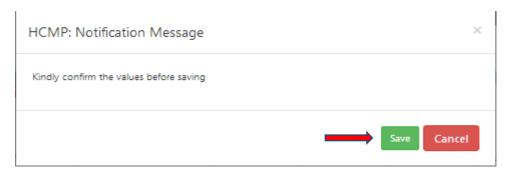


Figure 21 Confirm values

Click on the **Save** button once the values have been confirmed...

Redistribute Commodities

Click on the **Redistribute Commodities** link on the **Actions** tab.

This enables the user redistribute surplus or requested commodities to other facilities.



Figure 22 Redistribute commodities tab

From the page that loads, the user will select the sub county that the commodities will be distributed to. The list of facilities from that sub county will load on the facilities drop down.

The redistribution specifics may be entered: The commodity (the supplier, unit size, available batch stock & total balance will auto-populate), date of issue, quantity.

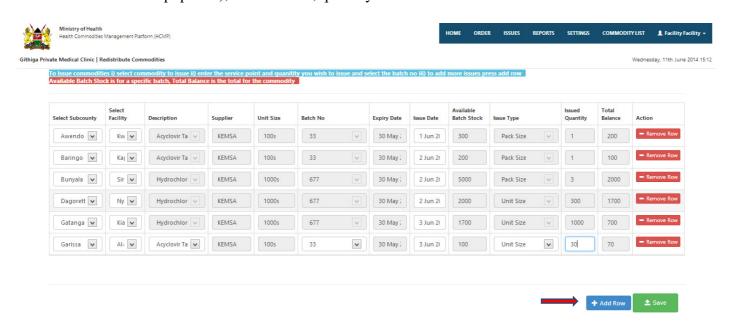


Figure 23 Redistribute commodities screen

Click on the **Save** button once the values are confirmed for the information to be recorded.

Receive Commodities

Click on the Receive commodities link on the Actions tab.



Figure 24 Receive commodities tab

This will load the screen shown below displaying the received commodities and the name of the facility which made the redistribution. Click on **Update** to receive the commodities and update the stock levels.

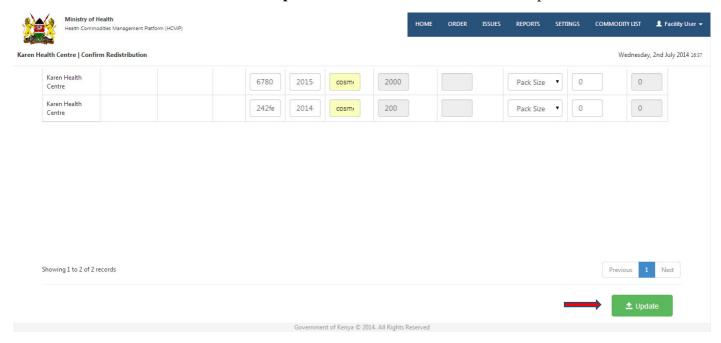


Figure 25 Receive commodities from other sources

ORDERS

Click on the **Orders** link on the **Actions** tab.

This will avail two options allowing the user to order from two suppliers; Either KEMSA or MEDS as shown below:



Figure 26 Orders tab

Order from KEMSA

Click **KEMSA** to load the facility stock consumption summary.

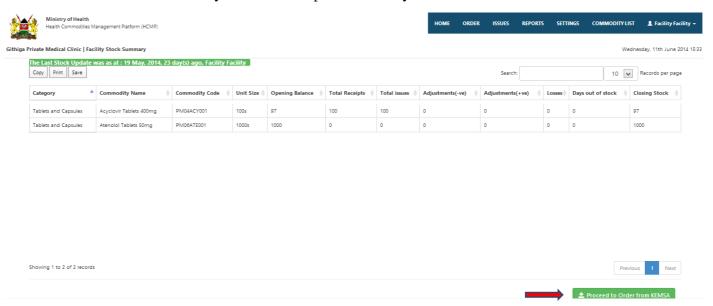


Figure 27 View orders

The columns are explained as follows:

Opening Balance: The quantities physically available at the last ordering period

Total Receipts: The quantities received by the main suppliers e.g. KEMSA

Total Issues: The quantities issued to the facility's service points

Adjustments (-ve): The quantities redistributed by the facility to other facilities

Adjustments (+ve): The quantities received by the facility from other facilities or donors

Losses: The quantities that expired or were found missing without any explanation

Days out of stock: The duration from when the period the commodity's stock was exhausted to date

Closing Stock: The physical count available during the time of placing the order

Click on Proceed to Order from KEMSA the bottom right of the screen to load the order form.

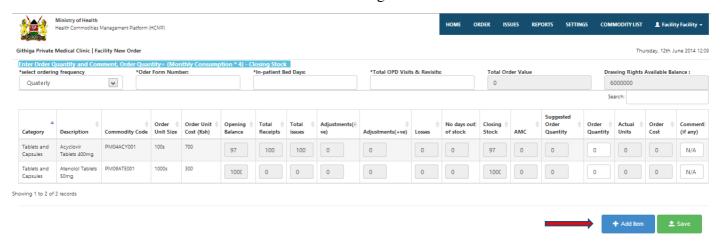


Figure 28 Order form

The user is required to select the ordering frequency, order form number, in patient bed days and the total OPD visits and revisits monthly. These values need to be filled in order for the orders to be submitted, failure to which the system shows a notification error.

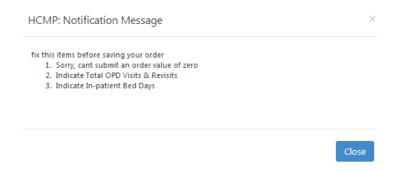


Figure 29 Error notification

To add a commodity that is not in the order form, click on the **Add item** button at the bottom right of the screen. This action prompts a notification message pop up window as shown below, requesting the user to select the additional commodity.

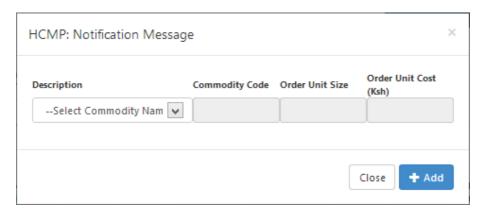


Figure 30 Order notification

Click the **Add** button on the pop up that appears. The commodity will then appear in the order form. After adding all required commodities and specifying their order values, click on the **Save** button. This will load a pop up showing the order details.

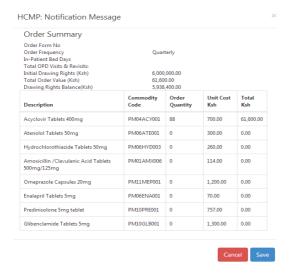


Figure 31 Order details

Update Order Delivery

Click on the **Update Order Delivery** link on the **Actions** tab.



Figure 32 Update order delivery tab

This loads the order summary which gives details of the four order status:

- Rejected
- Pending Approval
- Pending Delivery
- Delivered

Note: After submitting an order the notification below will appear.

The user can also use this to access the update order delivery page

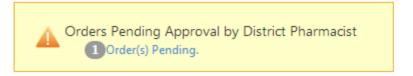


Figure 33 Order pending approval

Order Status

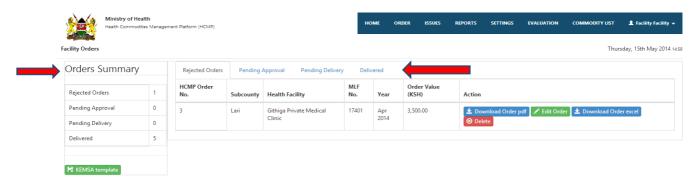


Figure 34 Facility order listing

Rejected:

Click on the **Rejected orders** tab.

This is an order that has been sent by the facility user to the District pharmacist and rejected due to certain issues.

This page displays the Order no., the facility sub-county, the name of the health facility, the year when the order was placed and the order value in Kenya shillings (KSH).

To edit this order:

- i) Click the **Download Order Excel** to download it in excel format and edit offline then upload.
- ii) Click on the **Edit Order** above to load the edit order page shown below

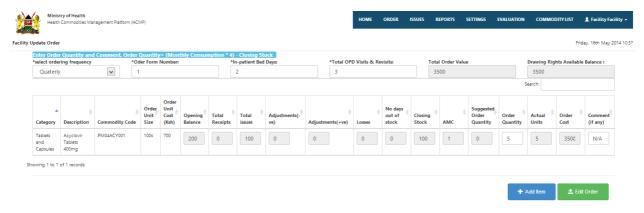


Figure 35 Edit rejected order

This page allows the user to edit the Order quantity. Use the **Add Item** button to add any commodity that was missing in the order.

Note: All the grayed columns cannot be edited.

Pending Approval

Click on the **Pending Approval** tab.

The list of all orders placed by the facility but not yet approved by the sub county pharmacist will load.

These orders can only be viewed but not edited.

Once approved, the order moves from this list to orders pending delivery.

Pending Delivery

Click on the **Pending Delivery** tab.

The list of all orders yet to be delivered by the supplier to the facility will load.

To update a n order delivery made by the supplier, click the **Update** button to input the delivery details.

Delivered

Click on the **Pending Approval** tab

The list of all orders that have been received by the facility from the supplier will load.

The user may download the delivery received in PDF or Excel format.

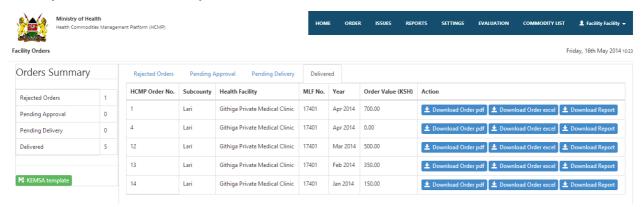


Figure 36 Delivered orders

Download KEMSA Template

The user may download the KEMSA order form (in excel format) and fill the respective order details offline.

This file may be uploaded onto HCMP at a later time.

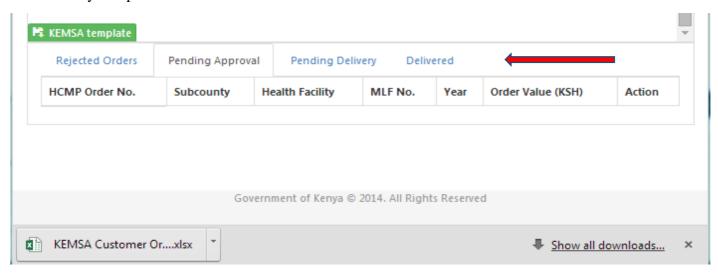


Figure 37 Downloading the KEMSA template

SERVICE POINTS

Click on Add Service Points link under the Actions tab.

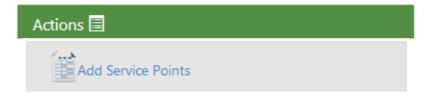


Figure 38 Add Service Points

This will load the screen below which shows all the service points within the facility, the date they were added and who was responsible for the add. The edit option is available allowing the user to edit this information if required.

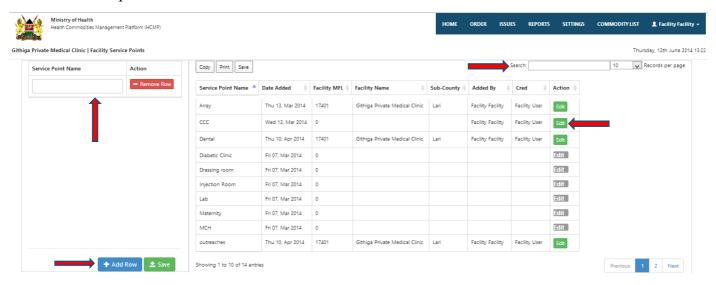


Figure 39 Service points

Add service point

Click on **Add Row** at the bottom of the screen. Write the name of the new service point in the input box to the right of the screen. Click the save button to save the changes. To remove a row, click on the **Remove Row** button next to the user input box. Click **Add Row** to add a row.

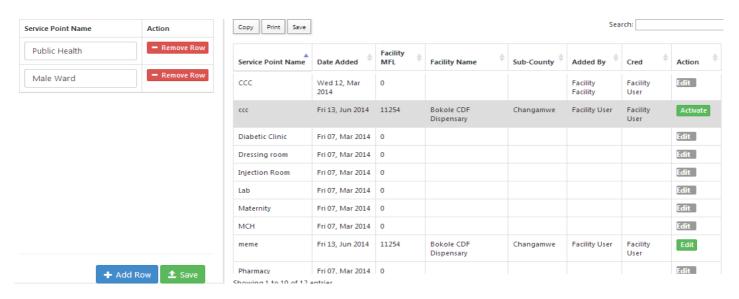


Figure 40 Add a service point

The added service point will be reflected as a new service point on the table as shown below.

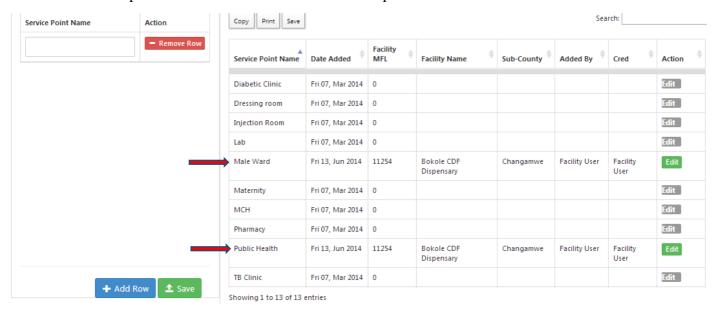


Figure 41 Added service points

Edit Service point

Click on **Edit** at the end of the row of the specific service point. This loads a pop up allowing the user to edit the service point name. Click save to keep the changes.

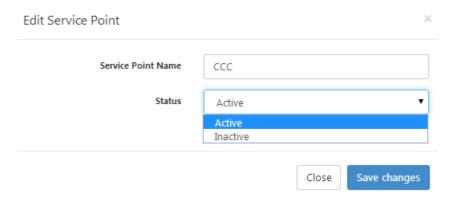


Figure 42 Edit a service point

Activate or Deactivate a Service Point

Click on the **Edit** button to the right of the service point name. The above pop up will appear enabling the user to select either the active or inactive status.

REPORTS

Click on the Reports tab in the Actions section on the Home Screen as shown below:

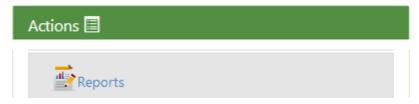


Figure 43 Reports

There are several reports available for access:

- Expiries
- Divisional reports
- Facility Statistics
- Other Reports

Expiries

Potential Expiries (3/6/12 Months)

The Potential expiries indicate drugs that will expire within the durations of 3 months, 6 months and 1 year.

This window can also be accessed by clicking the potential expires notification available on the homepage. See figure below.



Figure 44 Potential expires notification

The figure below loads showing the specifics of potential expiries.

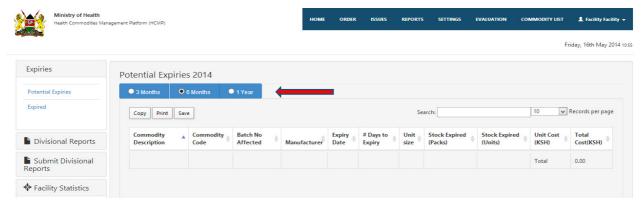


Figure 45 Potential expiries report

Actual Expiries

This is a report of the expired commodities within the facility. Click on the notifications available on the homepage.



Figure 46 Expired commodities

This will load up the screen below showing expiry details.

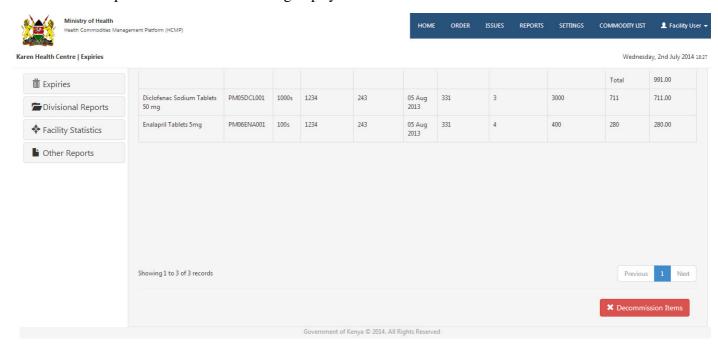


Figure 47 Expired commodities

Decommission Expired Commodities

Click on **Decommission** button to decommission expired products

An email notification will be sent to the district pharmacist and the decommissioned commodities will be removed from the system.

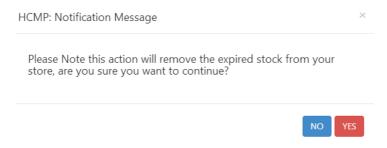


Figure 48 Decommissioning expired commodities

Divisional Reports

This has several reports; Malaria, TB & Reproductive Health.

Click on the respective tabs to access each report.

The user has an opportunity to download the report as either Excel or PDF file.

The edit tab allows the user to make any changes to the submitted report.

Submit Divisional Reports

To fill in either of the reports click the respective report tab, after filling all required details, click the Save button to save changes and submit the report.

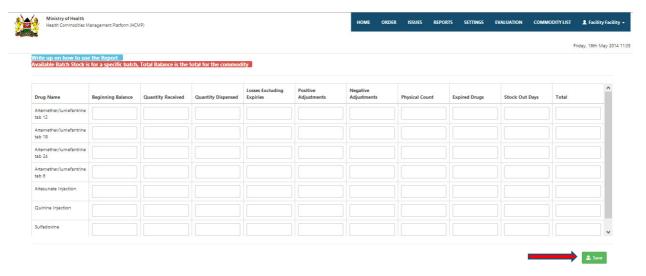


Figure 49: Submit divisional reports

Facility Statistics

Comprehensive facility statistics are shown in graphs. These statistics include expiries, cost of orders, consumption and user statistics.

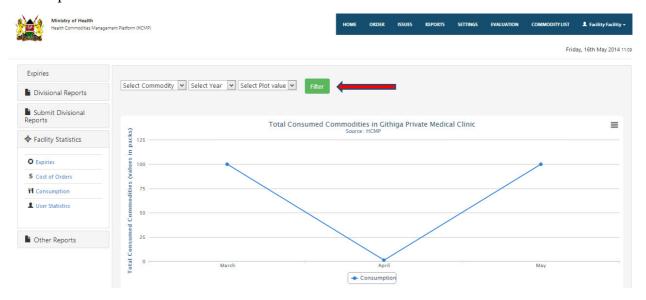


Figure 50 Facility statistics

To get user specific reports, use the filter options to choose the criteria.

Commodity List

Click on the Commodity List link on the Top Menu Section.



A screen loads showing a comprehensive list of all the commodities available in the facility.

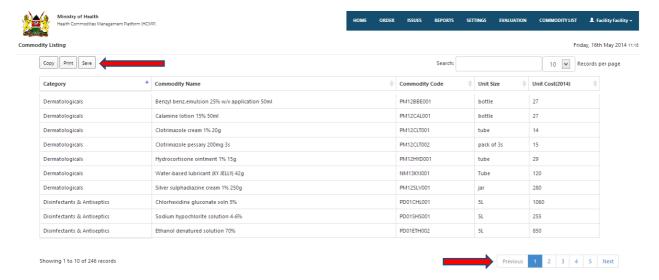


Figure 52 Commodity list

An option of copy, print or save is given to the left as shown above.

PASSWORD MANAGEMENT

Change Password

Click on the **Change Password** to change the default password assigned by the system (123456)



Figure 53 Change password

Note: This is highly recommended since it ensures user privacy and data security.

This loads up the change password dialogue box. Enter the old password in the first input box, followed by the new password and confirm it. Press **Save** to save the changes.

The user can now use the new password for log in.

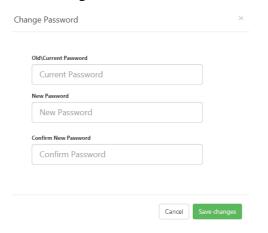


Figure 54 Change password dialogue

Forgotten Password

Click on can't access your account? as shown below.

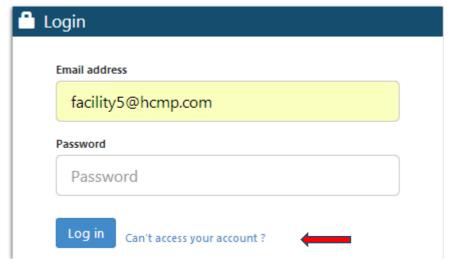


Figure 55 Accessing forgotten password

This redirects the user to the password recovery screen. Enter the email used for registration and click the recover button. The system sends an email with a recovery link.

Follow this link to recover the password.

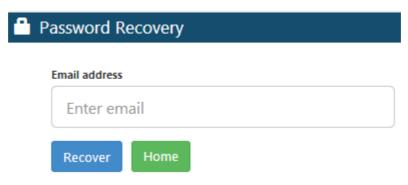


Figure 56 Password recover

LOG OUT

Click on Facility User on the menu bar.

The Log Out option will appear as shown below. Click on this option to log out.

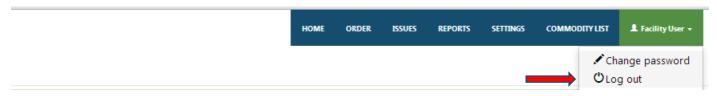


Figure 57 Log out