Facility Guide: Transition to the NPC Catalogue in TaifaCare-KenyaEMR

(Last update: October 2026)

TASK:	Support facilities with a structured approach to effectively transition, adopt, implement, the NPC catalogue in Taifacare-KenyaEMR
OBJECTIVE:	Orient the facility teams on the operational transition from the current commodities catalogue to the new National Products Catalogue in Taifacare-KenyaEMR
WHO:	Facility In-charges, Pharmacists, Pharmaceutical Technologists, Store Managers, Procurement Officers, & EMR Champions
REQUIRED MATERIALS:	Functional TaifaCare **Version 19.4.4 and above**

SUMMARY:

This guide outlines a step-wise process to ensure the transition success, clear role specific activities, a readiness evaluation checklist and dedicated technical support escalation channels

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Purpose and Scope

This guide supports health care workers and facility management teams to move from the current Commodities catalogue to the new Health Products and Technologies (NPC) catalogue in TaifaCare-KenyaEMR. It explains what is changing, who does what, the step-by-step process for migrating existing stock, and the proposed timelines for the system update and go-live.

The guide applies to all facilities using the TaifaCare-KenyaEMR inventory and pharmacy modules.

What Is Changing

The most important change is how stock is recorded and tracked.

Area	**Current Commodities Catalogue**	**New NPC Catalogue**
Stock level tracking	By **generic name**	By **commodity brand name**
Batch records	Aggregated under the generic commodity	Captured separately for each brand, with its own batch number, quantity and expiry date
Stock reports	Totals per generic item	Totals per brand, with batch-level detail
Opening stock in the new catalogue	Not applicable	Loaded through the **Import Excel template**

What does this mean in practice? Where a facility previously saw one line for a generic item (for example, one line for a given generic medicine), it will now see separate lines for each brand held in stock. Every brand must be loaded with its own batch numbers, quantities and expiry dates.

The Transition Process

Step 1: Preparation

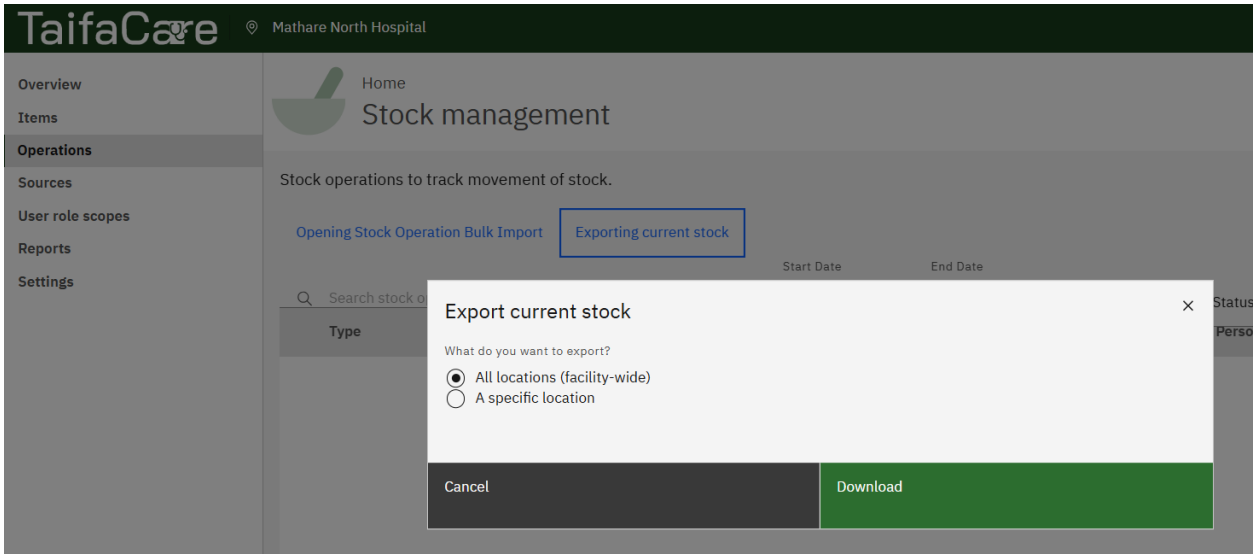
1. The Facility In-charge appoints the transition team and sets the stock take date.
2. Communicate the cut-over window to all service points. Plan to pause receiving and issuing of stock, or to record transactions manually, for the duration of the stock take and upload.
3. Print stock take sheets with columns for brand name, generic name, strength and formulation, batch number, quantity and expiry date.
4. Ensure all pending transactions (issues, returns, receipts) have been posted in the current system.

Step 2: Take the current stock

1. Count all stock physically in every store and service point.
2. For every item, capture the **brand name, batch number, quantity and expiry date**.
3. Where one generic item has several brands, record each brand separately. Where one brand has several batches, record each batch on its own line.
4. Separate expired, damaged and quarantined stock and record it on its own sheet.
5. Its recommended that counts be conducted by more than one person where applicable and signed by the Store Manager and the Pharmacist (for pharmaceuticals).
6. Compare the physical count with the system balance and document any variances with explanations.

Step 3: Download and save the current stock

In the current Commodities catalogue, run the stock report and **download the current stock**.



1. **Save the stock document** in a secure location with the facility name and the date in the file name (for example, *FacilityName_CurrentStock_YYYY-MM-DD*).
2. Keep a printed or backed-up copy. This is the reference for reconciliation if any issue arises after the upload.

Step 4: Download and complete the Import Excel template

Opening Stock Data – Complete one row per drug batch (delete example rows before uploading)								
OPERATION DATE	LOCATION	COMMON NAME	BATCH NUMBER	EXPIRATION DATE	QUANTITY	QTY UOM	MANUFACTURER NAME	PURCHASE PRICE
YYYY-MM-DD (go-live date)	*Exact name from Valid_Locations*	*Drug/item name as in OpenMRS*	*Batch/lot no. (use UNKNOWN if n/a)*	*YYYY-MM-DD (blank if no expiry)*	*Positive number*	*e.g. Tablet Capsule Vial*	*Optional*	*Optional (decimal, e.g. 12.50)*
2026-06-11	*Main Pharmacy*	*Diazepam 5 mg Oral Tablet – Valium*	*BN-2024-001-Ken*	*2027-06-30*	*1200*	*Tablet*	*Aspen Pharmacare*	*12.5*

1. An **Import Excel template** will be provided as above with clear instructions on how to fill each section.
2. Fill in the current stock details from the stock take, **one row per brand and batch number**, using the required fields below.
3. Do not change column headings or order, and do not merge cells.

Column	Required?	Notes
OPERATION DATE	Required	YYYY-MM-DD · The cut-over date. Same value for all rows in one import batch.
LOCATION	Required	Exact location name from Valid_Locations sheet (case-sensitive).
COMMON NAME	Required	Drug or item name as it exists in OpenMRS stockmgmt_stock_item. System matches by name.
BATCH NUMBER	Required	Batch / lot number from packaging. Use UNKNOWN if not recorded.
EXPIRATION DATE	Conditional	YYYY-MM-DD · Required when the item has an expiration date. Leave blank only for non-expiring items.
QUANTITY	Required	Physical count at cut-over. Must be a positive whole number or decimal (e.g. 1200 or 0.5).
QTY UOM	Required	Unit of measure name (e.g. Tablet, Capsule, Vial, Pack, Bottle, mL, g). Must match a packaging UOM registered for the item.

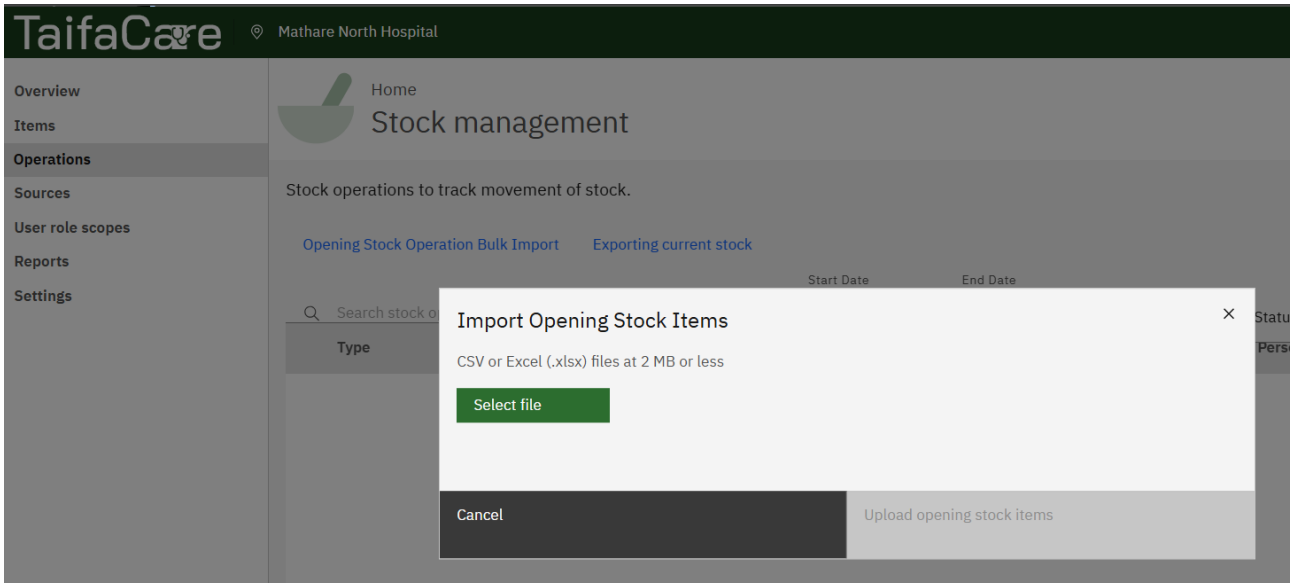
MANUFACTURER NAME	Optional	Manufacturer or supplier name. Stored on the stock batch.
PURCHASE PRICE	Optional	Unit purchase price as a decimal number (e.g. 12.50). Requires QTY UOM to be set.

Note: the exact required fields and format follow the template provided with the update. Where this guide and the template differ, follow the template.

4. Remove expired stock from the import file. Handle expired stock through the facility's disposal procedure.
5. Check the file for blanks, duplicates, wrong dates and mismatched quantities

Step 5: Review and upload

1. The Pharmacist and the Store Manager review the completed file against the stock take sheets.
2. The Facility In-charge approves the file for upload.
3. Upload the file from the provided link, select file and Upload as Opening stock.



Step 6: Verify and reconcile

1. Run the stock report in the NPC catalogue.
2. Compare totals by brand and batch against the saved current stock document and the stock take sheets.
3. Document and resolve all variances. Report persistent issues to the KenyaEMR support team.
4. The Facility In-charge signs off the reconciliation.

Step 7: Re-Configure Billable charge Items

1. Access the Billing Admin Module
2. From the Clinical Charges sub-Module, reconfigure all chargeable items to reflect the new NPC Catalogue.
    - Update the charge items as services or products one at a time
    - Use the Bulk upload features available if operational

Step 8: Go live

1. Resume receiving and issuing using the NPC catalogue.
2. Record all new receipts by brand, batch number and expiry date.
3. Update any transactions that were done manually during the cut-over window.
4. Monitor stock levels, dispensing and reports closely during the first two weeks.

Activities by Role and Task

Step	Facility In-charge	Store Manager	Procurement Officer	Pharmacist	Clinical Officer	Nurse	Billing team/ Finance Manager
1. Prepare	Appoint team, set dates	Plan stock take dates	Align orders to cut-over	Plan technical oversight	Attend orientation	Attend orientation	Review Charge items per Brand Names
2. Stock take	Oversee	Lead Physical count	Provide brand details	Verify batches and expiry	Support in clinical areas	Count at service points	N/A
3. Download and save	Confirm	Download and save	Receive copy	Confirm	N/A	N/A	N/A
4. Complete import file	Monitor	Fill template	Support brand mapping	Advice on mapping	N/A	N/A	N/A
5. Review and upload	Approve	Upload	N/A	Review	N/A	N/A	Review
7. Review Billable clinical charges	Approve Guide Pricing	Share list Guide Pricing	Share list Guide Pricing	Share list Guide Pricing	N/A	N/A	Add Prices per payment mode for affected products

Step	Facility In-charge	Store Manager	Procurement Officer	Pharmacist	Clinical Officer	Nurse	Billing team/ Finance Manager
6. Verify	Sign off	Reconcile	Update records	Validate dispensing	Report issues	Report issues	
7. Go live	Confirm readiness	Receive by brand	Order by brand	Dispense by brand	Prescribe and check	Issue and record by brand	

Proposed Timelines by facility

The dates may vary in different facilities- to be guided by the facility in charges.

Phase	Proposed timing	Key activities
Stock take and data preparation		Physical stock take, download and save current stock, complete the Import Excel template
System update (release)		NPC catalogue deployed to the system; import template made available
Orientation and preparation		Orient facility teams, appoint focal people, plan the cut-over window
Upload and reconciliation		Upload, verify, reconcile, sign off
New catalogue in use (go-live)		All transactions recorded in the NPC catalogue
Post go-live support		Helpdesk support, monitoring, resolution of issues
Retire the old catalogue		Old catalogue closed to new transactions once all facilities have reconciled

Support and Escalation

1. Facility NPC Catalogue transition focal Person
2. Sub-county or county health records and pharmacy teams
3. KenyaEMR support team /Taifacare helpdesk (**0800722440)**

Facility Readiness Checklist

1. ☐ Transition team appointed and cut-over window communicated
2. ☐ Pending transactions posted in the current system
3. ☐ Physical stock take completed and signed
4. ☐ Current stock downloaded and saved
5. ☐ Import Excel template completed by brand and batch
6. ☐ File reviewed by Pharmacist and approved by Facility In-charge
7. ☐ File uploaded and errors resolved
8. ☐ Stock reconciled and signed off
9. ☐ Staff oriented and go-live confirmed

Insert actual dates:

System update: ____

New catalogue in use: ____

Old catalogue closed: ____Yes..... No