

MEDICAL SUPPLIES DIVISION

USER MANUAL

Annual Estimation Module

Swastha Health Information System

Module	Annual Estimation
Applicable System	Swastha HIS
Audience	RDHS, Institutional Heads, Divisional Pharmacists, Chief Store Managers, Stores Managers
Document Type	User Manual

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1. Introduction

The Annual Estimation module in Swastha HIS enables healthcare institutions to forecast, request, review, approve, and finalize their yearly medical supplies estimation. This manual walks each user role through the complete process — from generating the estimation to printing the final signed document.

2. Users Who Participate

The following roles take part in the Annual Estimation process, each with a distinct responsibility at a specific stage.

Role	Responsibility in the Annual Estimation Process
Regional Director of Health Service (RDHS)	Provides the final approval for estimations raised by Provincial Hospitals.
Institutional Head	DDG / Director / Medical Superintendent / DMO / MOIC / SD — approves the estimation at institution level.
Divisional Pharmacist	Reviews and forwards estimations for Provincial Hospitals.
Chief Store Manager	Chief Pharmacist / Chief MLT / Chief Radiographer / AO / DO — generates and assigns estimations, and completes stage 1 approval.
Stores Manager	Pharmacist / MLT / Radiographer / DO / PHMA — enters the estimation and accepts it after approval.

3. Prerequisites

Before starting the Annual Estimation process, confirm the following are already in place:

- Users must have access to the relevant released item list.
- Users must have access to the relevant warehouses.
- The item list must be assigned to the applicable warehouses.

Note: If any of the above are not yet set up, use the Hospital Admin role to grant the required warehouse and item access. Refer to the Swastha System PDF Guide, available at the top right corner of the system, for detailed instructions.

4. Process Overview

The Annual Estimation process consists of four sequential steps:

1. Generate Estimation & Assign Estimation
2. Enter Estimation
3. Approve Estimation
4. Print Document

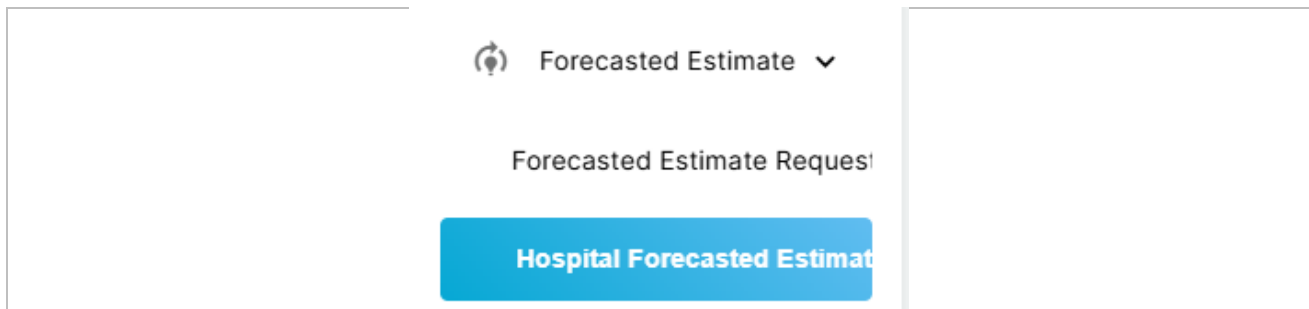


Figure 4.1 — Annual Estimation process flow

Step 1 — Generate & Assign Estimation

1 Generate Estimation

User	Chief Stores Manager
Role	Chief Pharmacist / Chief MLT / Chief Radiographer
Path	Forecasted Estimate >> Hospital Forecasted Estimate

Action	Year	Name	Type	Item Type	Institute Category	Item Category	Warehouse	From	To	Submission Start Date	Submission End Date	DP Required Date	Message	Status	Approval Stage
	2027	estimation special	Annual	All	Provincial	Printed Form	Apeksha Hospital Maharagama Drugstore (Retired) - 0470	2027-01-01	2027-12-31	2026-06-18	2027-03-31	2027-01-05	ok	Pending	
	2030	printed form estimation	Annual	All		Printed Form	Apeksha Hospital Maharagama Drugstore (Retired) - 0470	2030-01-01	2030-12-31	2026-06-18	2026-06-30	2026-06-25	ok	Pending	
	2026	estimation 78	Special	All	Line Ministry	Printed Form	Apeksha Hospital Maharagama Drugstore (Retired) - 0470	2026-01-01	2026-12-31	2026-06-01	2026-06-12	2026-06-11	ok	Pending	

Figure 1.1 — Hospital Forecasted Estimate screen

1. Click the Generate button to create the estimation record.

Figure 1.2 — After Generated

2 Assign Employees

Once the estimation is generated, assign the responsible Stores Manager to each warehouse.

Action	Year	Name	Type	Item Type	Institute Category	Item Category	Warehouse	From	To	Submission Start Date	Submission End Date	DP Required Date	Message	Status	Approval Stage
	2027	estimation special	Annual	All	Provincial	Printed Form	Apeksha Hospital Maharagama Drugstore (Retired) - 0470	2027-01-01	2027-12-31	2026-06-18	2027-03-31	2027-01-05	ok	GENERATED	
	2030	printed form estimation	Annual	All		Printed Form	Apeksha Hospital Maharagama Drugstore (Retired) - 0470	2030-01-01	2030-12-31	2026-06-18	2026-06-30	2026-06-25	ok	Pending	

Figure 1.3 — Assign employees screen

2. Select the Warehouse.
3. Select the Pharmacist.
4. Set the Expected Date.
5. Click Save.

Assign Pharmacist

Estimation Year

2027

Warehouse

Apeksha Hospital-PRINT

Pharmacist

Vishaka Boralugodage

Expected Date

25/07/2026

Save

Assigned Pharmacist

Action	Employee	Warehouse	Expected Date	Status Date
Sorry, no matching records found				

0-0 of 0

Figure 1.4 — Warehouse and pharmacist assignment

Step 2 — Enter Estimation

User	Stores Manager
Role	Drug Store Pharmacist / MLT / Radiographer
Path	Forecasted Estimate >> Forecasted Estimate Request

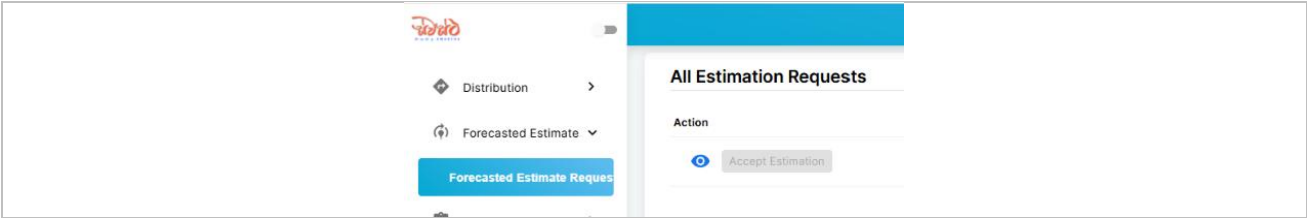


Figure 2.1 — Forecasted Estimate Request

- 6. Enter the estimate quantities for each item.
- 7. Click Save.

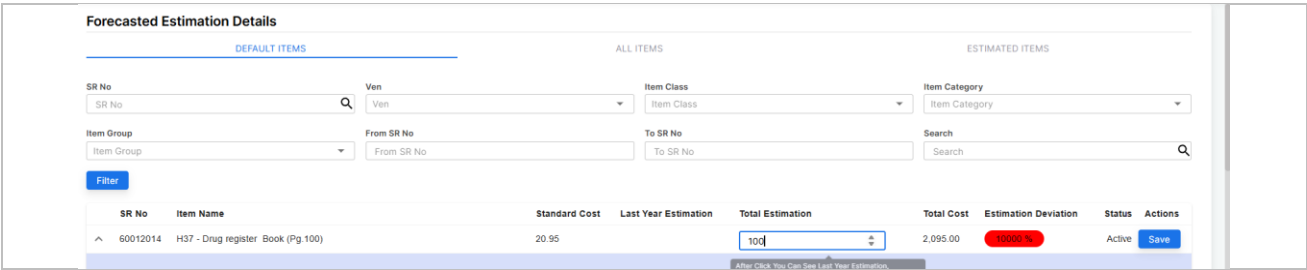


Figure 2.2 — Entering the estimate

Note: A remark must be selected whenever the estimate shows a significant deviation (more or less) from the last year estimate.

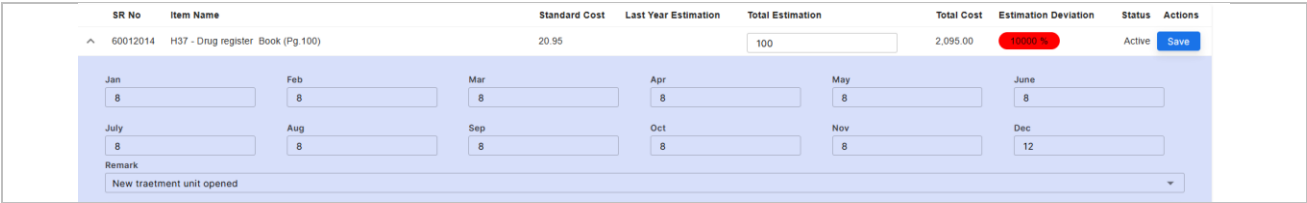


Figure 2.3 — Remark selection for deviations

Step 3 — Approve Estimation

The estimation passes through up to four approval stages depending on the institution type.

Stage 1 Approval

User	Chief Drugstore Manager
Role	Chief Pharmacist / Chief MLT / Chief Radiographer
Path	Forecasted Estimate >> Hospital Forecasted Estimate >> View Estimate

Save all the entered estimate data before finishing the forecast.

Estimation Details

INSTITUTE ITEMS

SR No: Ven: Item Class: Item Category:

Item Group: From SR No: To SR No: Search:

PENDING

SR No	Item Name	Standard Cost	Last Year Estimation	Total Estimation	Total Cost	Est. Dev.	Received Qty	Last Year Closing	Rem. Est.	Sub. Whs.	Pharm. Est.	Status	Actions
60012014	H37 - Drug register Book (Pg.100)	20.95		100	2,095.00	1000%	0	0	0	1	100	Pending	Save
60012027	H52 - Admission and discharge register Book (Pg.100)	0.00		0	0.00	0%	0	0	0	0	0	Pending	Save
60012030	H101 - Surgical Operation Register Book (Pg.100)	45.00		120	5,400.00	12500%	0	0	0	1	120	Pending	Save

Figure 3.1 — View Estimate screen

- Review and save all entered estimate data.
- Select the Save tab, then click Finish Forecast Estimate.

PENDING

SAVED

SR No	Item Name	Standard Cost	Last Year Estimation	Total Estimation	Total Cost	Est. Dev.	Received Qty	Last Year Closing	Rem. Est.	Sub. Whs.	Pharm. Est.	Status	Actions
60012014	H37 - Drug register Book (Pg.100)	20.95		100	2,095.00	1000%	0	0	100	0	1	100	Submitted
60012030	H101 - Surgical Operation Register Book (Pg.100)	45.00		120	5,400.00	12500%	0	0	120	0	1	120	Submitted

1 < 1 >

Print Sign Sheet Download Estimation Sheet(PDF) Download Estimation Sheet(Excel) Finish Forecasted Estimation

When You're Finish Forecasted Estimation you Can Not Update. Make Sure the Estimation is Complete Before Submit.

Figure 3.2 — Finish Forecast Estimate

Stage 2 Approval

User	Institutional Head
Role	Hospital Director
Path	Forecasted Estimate >> Hospital Forecasted Estimate >> My Pending Approval

Forecasted Estimation Details

MY PENDING APPROVALS PENDING APPROV

Estimation Year: Year Institute Category: All

Search: Filter

Action	Year	Name	Type	Institute Category	Institution
View Edit	2027	estimation special	Annual	Provincial	Apeksha Hospital, Maharagama (Special)

Hospital Forecasted Estimation

Figure 3.3 — My Pending Approval (Institutional Head)

- Click Approve to complete the estimate.
- Click Amend to send the estimate back to the Chief Pharmacist (CP) level.

Forecasted Estimation Details

SR No: Ven: Item Class:

Item Group: From SR No: To SR No:

Filter

SR No	Item Name	Standard Cost	Total Estimation
60012014	H37 - Drug register Book (Pg.100)	20.95	100
60012027	H92 - Admission and discharge register Book (Pg.100)	0.00	0
60012030	H101 - Surgical Operation Register Book (Pg.100)	45.00	120
60012031	H102 - Daily state & in ward patients Distribution Register (Page 100)	0.26	0
60012042	H311 - Hospital Inventory book (Equipment & General) (Pg.200)	348.60	0
60012050	H552 - Birth Particulars form book (Pg.100)	45.35	0
60012052	H604 - Day & night Nurses reports Book (Pg.100)	30.03	0
60012060	H841 - Birth Register Book (Pg.200)	348.60	0
60013028	H97 - Laboratory Service Specimen Register Book (Pg.100)	103.00	0
60017029	H99 - Medical officers Diary Book (Pg.100)	55.01	0

Approved Amend

Figure 3.4 — Approve / Amend options

Stage 3 Approval (Provincial Hospitals)

User	Divisional Pharmacist
Role	Divisional Pharmacist
Path	Forecasted Estimate >> Hospital Forecasted Estimate >> My Pending Approval

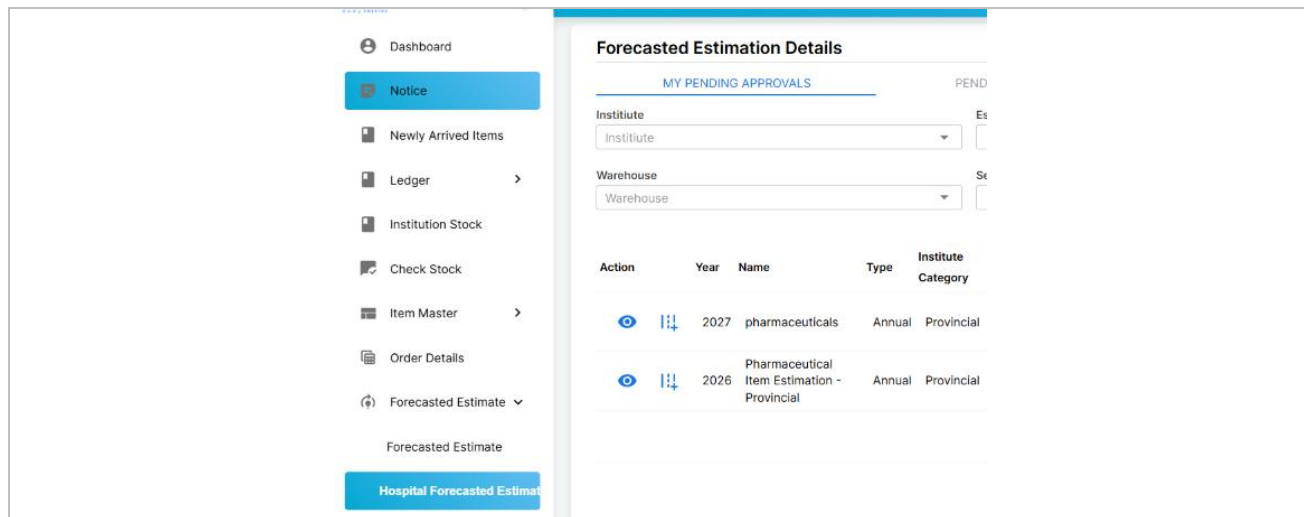


Figure 3.5 — My Pending Approval (Divisional Pharmacist)

- Click Approve to forward the estimation to the RDHS.
- Click Amend to send the estimate back to the Institutional Head.

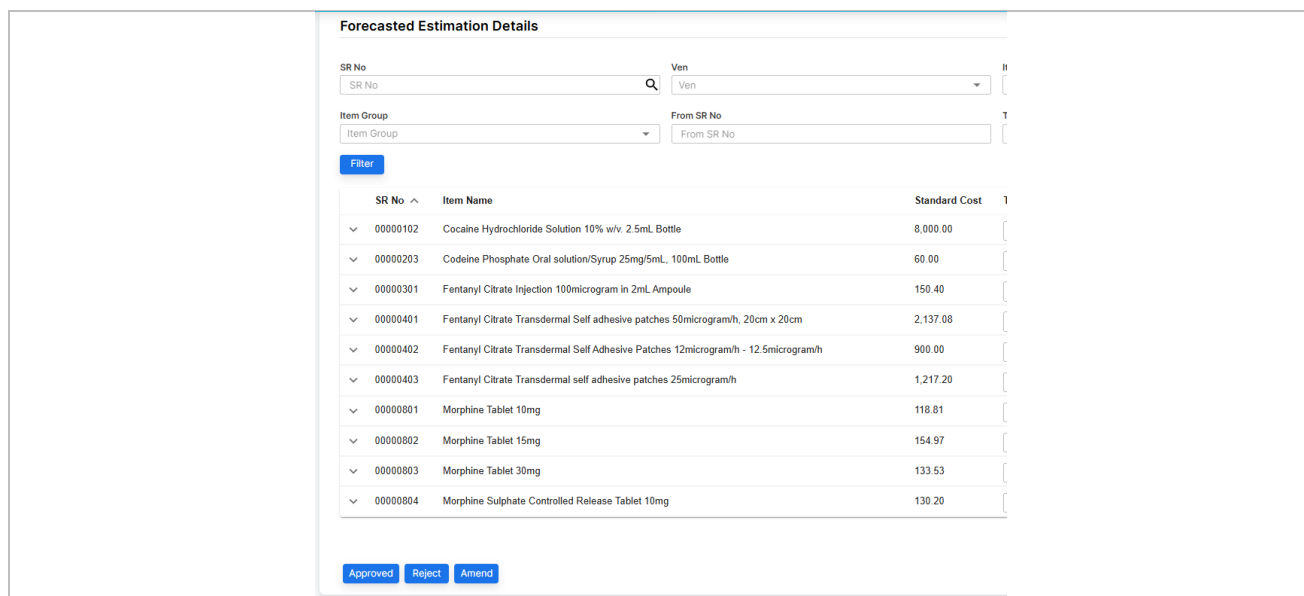


Figure 3.6 — Approve / Amend options

Stage 4 Approval (Provincial Hospitals)

User	Regional Director of Health Service
Role	RDHS
Path	Forecasted Estimate >> Hospital Forecasted Estimate >> My Pending Approval

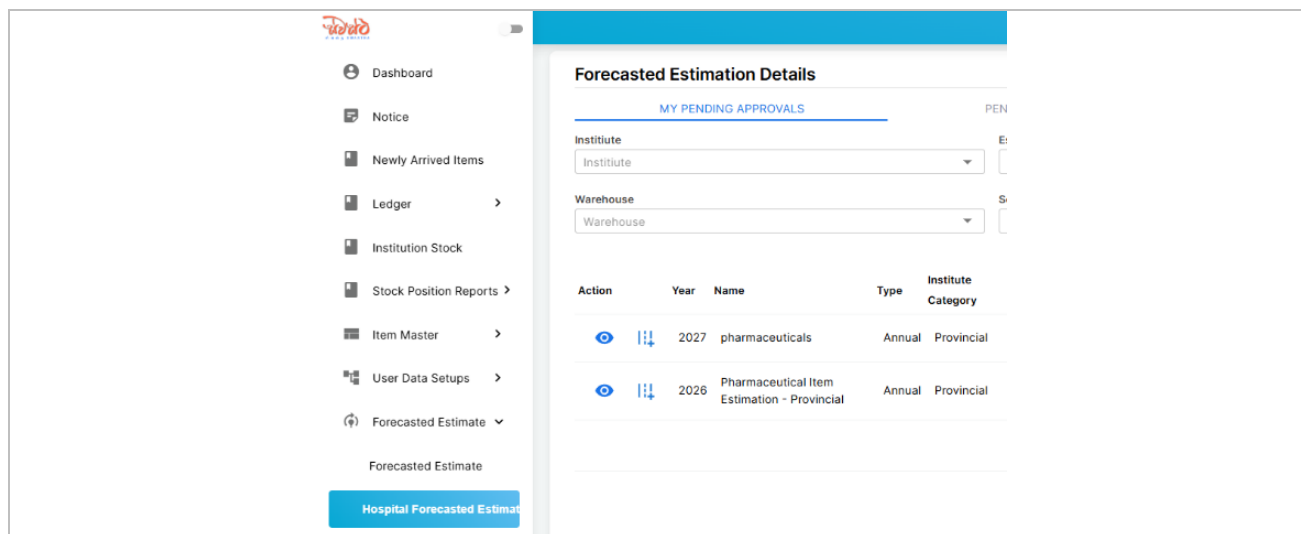


Figure 3.7 — My Pending Approval (RDHS)

- Click Approve to complete the estimation process.
- Click Amend to send the estimate back to the Divisional Pharmacist.

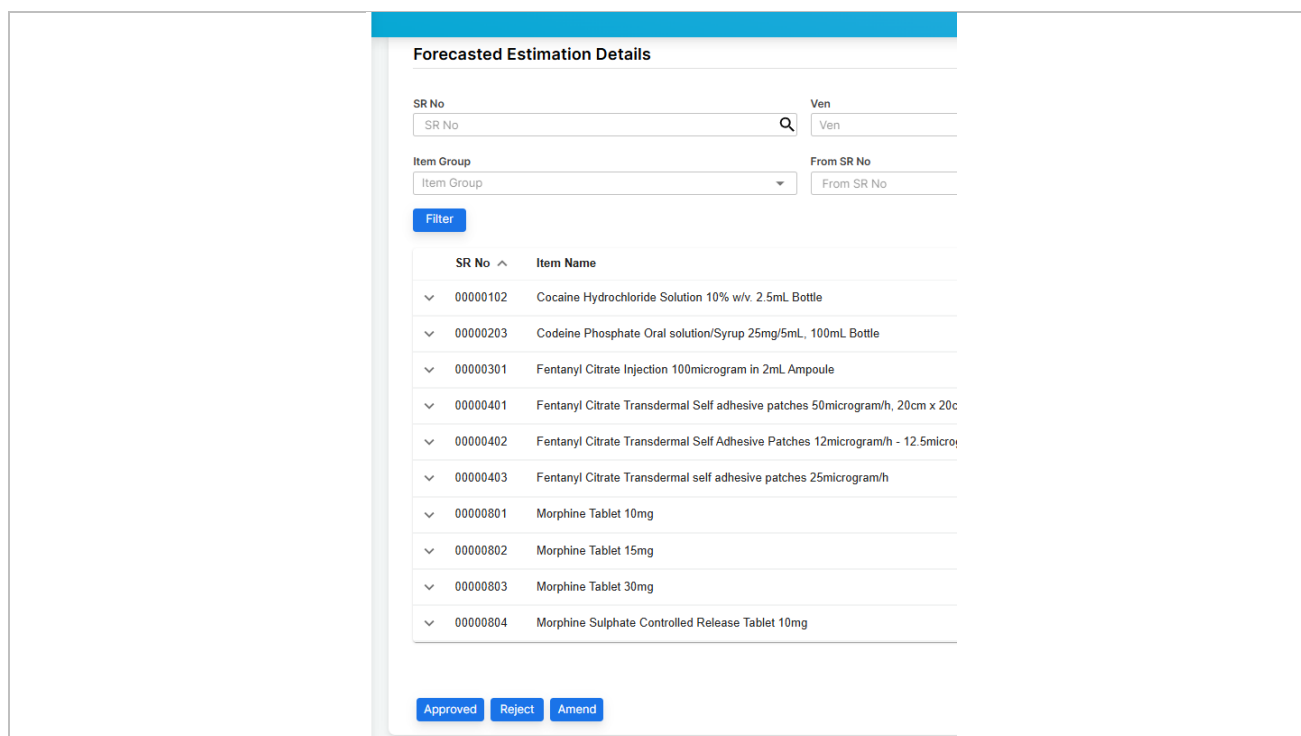


Figure 3.8 — Approve / Amend options

Step 4 — Print Document

Before printing, confirm the following requirements are met:

- Approval has been given by the Institutional Head (Line Ministry / sales customer institution) or the RDHS (Provincial Hospitals).
- The Warehouse Manager has accepted the estimation.

4.1 Accept the Estimation

User	Stores Manager
Role	Drug Store Pharmacist / MLT / Radiographer

Accept the estimation and confirm the item category.

Verify Estimation				
Class Name	Class Code	Estimation	Value	Action
Surgical things	SU	0.00	0.00	Accept
Family Health Bureau	FHB	0.00	0.00	Accept
Surgical Non Consumable	SNC	0.00	0.00	Accept
Surgical Consumable	SC	0.00	0.00	Accept
Special Donation Items	SDI	0.00	0.00	Accept
Radiology Item	RAD	0.00	0.00	Accept
Printed Form	PF	0.00	0.00	Accept
Laboratory Non Consumable	LNC	0.00	0.00	Accept
Laboratory Consumable	LC	0.00	0.00	Accept
Laboratory Chemical	LCH	0.00	0.00	Accept
Donation Equipment	DON	0.00	0.00	Accept
Dental Non Consumable	DNC	0.00	0.00	Accept
Dental Consumable	DC	0.00	0.00	Accept
Pharmaceutical	PHA	60.00	83,000.00	Accept

Figure 4.1 — Accept estimation

All Estimation Requests	
Action	Employee
Accept Estimation	M.A.C.M.Ihjas
Accept Estimation	M.A.C.M.Ihjas
Accept Estimation	M.A.C.M.Ihjas

Figure 4.2 — Accept item category

4.2 Print Signature Sheet

User	Chief Store Manager
Role	Chief Pharmacist / Chief MLT / Chief Radiographer
Path	Forecasted Estimate >> Hospital Forecasted Estimate >> Saved tab

Print the signature sheet to complete the Annual Estimation process.

Estimation Details

SR No

SR No

Q

Ven

Ven

▼

Item Class

Item Class

▼

Item Category

Item Category

▼

Item Group

Item Group

▼

From SR No

From SR No

To SR No

To SR No

Search

Search

Q

Filter

PENDING

SAVED

SR No	Item Name	Standard Cost	Last Year Estimation	Total Estimation	Total Cost	Est. Dev.	Received Qty	Last Year Closing	Rem. Est.	Sup. Est.	Sub. Whs.	Pharm. Est.	Status	Actions
00000102	Cocaine Hydrochloride Solution 10% w/v. 2.5mL Bottle	8,000.00	0	10	80,000.00	1000 %	0	0	10	0	0	0	Submitted	 
00000203	Codeine Phosphate Oral solution/Syrup 25mg/5mL, 100mL Bottle	60.00	0	50	3,000.00	3500 %	0	0	50	0	0	0	Submitted	 

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Print Sign Sheet

Download Estimation Sheet(PDF)

Download Estimation Sheet(Excel)

Figure 4.3 — Print signature sheet