



# USAID GLOBAL HEALTH SUPPLY CHAIN PROGRAM

## TECHNICAL ASSISTANCE, NATIONAL SUPPLY CHAIN ASSESSMENT TASK ORDER

### Guidance on Updating the SurveyCTO Code for the Key Performance Indicator (KPI) Data Collection Non-Central Tool

NSCA 2.0



DISCLAIMER: Development of the NSCA 2.0 toolkit was funded by the United States Agency for International Development (USAID). The authors' views expressed in this publication do not necessarily reflect the views of USAID or the United States Government.

## INTRODUCTION

Before reading this document, users are encouraged to familiarize themselves with the SurveyCTO programming environment. Resources available for learning SurveyCTO are provided in Annex 14 of the NSCA 2.0 Implementation Guide. Users should also review Table 8 in the NSCA 2.0 Implementation guide and the text explaining this table. Advanced understanding of the SurveyCTO coding environment should not be necessary to conduct essential updates to the key performance indicator (KPI) non-Central data collection tool (hereafter “KPI non-Central tool”) code, but some familiarity with the structure of SurveyCTO Excel coding workbooks and how they operate is required. Some optional changes to the SurveyCTO code may require a more advanced knowledge of the SurveyCTO coding environment.

The guidance provided in this document refers primarily to the NSCA 2.0 “KPI non-Central tool” SurveyCTO coding, which is presented in a Microsoft Excel workbook. The guidance also references four other NSCA 2.0 resources: the “Facilities\_v1.csv” worksheet, “Tracer Commodities\_v1” worksheet, “Months\_v1” worksheet, and the “KPI non-central analysis template”. The first three worksheets are ancillary files that support the KPI non-Central tool SurveyCTO workbook, while the latter is one of two Microsoft Excel platforms that provides platform for analyzing KPI data collected in SurveyCTO (the other analysis template supports calculation of KPIs collected only at the central level).

This document is divided into four sections (subsequent to the introduction):

1. Brief overview of the structure of the KPI non-Central tool SurveyCTO Excel coding.
2. Changes that will need to be made to the SurveyCTO coding for all NSCAs conducted. These changes include populating the SurveyCTO code with the appropriate subnational division names, the names of facilities / entities included in the sample for the assessment, updating the list and number of tracer commodities, and updating the names of the months for which historical data will be collected.
3. Optional changes that likely will be needed for most NSCAs. These changes include minor wording changes to questions / responses including some generic language that can be customized to a particular country.
4. Advanced changes that may be necessary but should be done with caution.

Assessment teams should thoroughly check the functionality of the SurveyCTO code after changes have been made. This should be done by manually going through the data collection instrument to ensure that the changes made appear properly in the SurveyCTO data collection instrument, relevant skip logic still functions properly, and spelling and other grammatical concerns are all correct.

# STRUCTURE OF THE KPI NON-CENTRAL TOOL CODEBOOK

There are seven worksheets in the KPI non-Central tool Excel workbook:

## 1. Survey



The first row of this worksheet contains headers that list the type of information to be included in each column. This includes the question types (“type”), numbers (“Names”), the questions (“Label”), question explanations / supporting text (“hint”), skip logic (“relevance”), the number of times questions in certain areas should be repeated (“repeat\_count”), and other information for administering the survey.

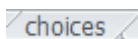
Each row is for one question / collection of one data point. The rows are organized into introductory items and then by the six data extraction tables included in the KPI non-Central tool survey (Table I).

TABLE I: SECTIONS IN THE SURVEY WORKSHEET	
ROW NUMBERS	SECTION
1 - 31	Collection of information about the team conducting the survey, information about the site being visited, and the months of historical data collection.
32 – 39	Table of contents
40 - 134	Table 1: Stock Data (collects information for about stocked according to plan, stockouts, commodity wastage, and stock accuracy).
135 - 162	Table 2: Upstream order data (collects data on emergency orders and order on-time rates; not applicable for central warehouses).
163 - 197	Table 3: Downstream order data (collects data on order turn-around time and order in-full rate; applicable only for warehouses).
198 - 239	Table 4: Costs of warehouse operations and distribution operations (applicable only for warehouses).
240 - 284	Table 5: Temperature excursion data.
285 - 382	Table 6: Human resources data (collects data on percentage of supply chain staff vacant and supply chain staff turnover ratio).

Assessment teams likely will need to update the “repeat\_count” column in Table I and make some wording changes in the column “Label”. More advanced changes may also be made in the “Relevance” column, and questions may be inserted. These changes are discussed in the sections “Changes that need to be made for all assessments”, “Optional changes that likely will be

needed for most NSCAs”, and “Advanced changes that may be necessary but should be done with caution”.

## 2. Choices

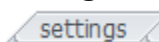


This worksheet contains the possible responses to close ended questions listed on the Survey worksheet. There are four columns of relevance for adopting the coding on this worksheet:

- a. **list\_name:** Refers to the answer choices listed for a question in the “type” column on the survey worksheet. All rows with a particular list\_name will provide answers for questions with this label in the “type” column in the survey worksheet. For example Row 100 on the Survey worksheet contains “select\_one yesnodk” in the first column. Rows 12-14 on the Choices workbook all contain “yesnodk” under list\_name, indicating these are the possible answers for the question listed on row 100 of the Survey worksheet (note that “select\_one” indicates only one answer may be selected, while “select\_multiple” would allow multiple answers to be selected). The term “yesnodk” does not appear elsewhere under list\_name on the choices worksheet; it is best practice to keep the possible answers grouped together. (Readers that do not understand this explanation are encouraged to review or further read or watch SurveyCTO tutorials before proceeding with making changes to the KPI non-Central tool workbook.)
- b. **value:** This determines how SurveyCTO will code the answer selected.
- c. **label:** This column lists the answers as they will appear during data collection. For example, for questions with the “yesnodk” list\_name, the options “No”, “Yes”, and “I don’t know” will be available for the data collection team to select.
- d. **filter:** This allows SurveyCTO to only display some of the labels for a particular list\_name; more details on this column will be provided in the section “Changes that need to be made for all assessments”.

Note that the images column is not used for the KPI non-Central tool.

## 3. Settings

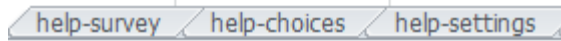


This contains information that allows SurveyCTO to identify the workbook.

**\*IMPORTANT NOTE:** When users are creating a SurveyCTO space, they may need, initially, to update this worksheet because simply uploading the KPI non-Central tool may preclude SurveyCTO from correctly identifying the workbook. To do this, users need to create a new form in SurveyCTO; this form need not contain anything in it. The created form should then be downloaded and the information on the Settings worksheet copied and pasted into the KPI non-Central tool. KPI non-Central tool can then be uploaded to SurveyCTO, and SurveyCTO will recognize the form correctly.

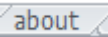
Otherwise, users should not change this worksheet.

## 4. help-survey, help-choices, and help-settings



These worksheets contain standard SurveyCTO help and guidance, with each sheet corresponding to the three sheets listed above. Users are encouraged to read through these sheets, but no changes to these sheets are necessary (although changing the sheets will not affect the functionality of the coding).

## 5. **about**



This worksheet lists information about the creation of the KPI non-Central tool for informational purposes only. Users are not expected to change this worksheet, although they may wish to use this worksheet to track dates and details about changes made elsewhere in the workbook.

# CHANGES THAT NEED TO BE MADE FOR ALL ASSESSMENTS

## UPDATING THE NAMES OF SUBNATIONAL UNITS

Usually, entities and facilities included in the sample for the assessment will be located in discrete subnational units (such as districts or similar health or political groupings). The question on row 12 of the Survey worksheet asks data collectors to specify this subnational unit, and refers to the list\_name “facdistrict” on the choices worksheet. On the Choices worksheet, there default programming lists four subnational units (rows 4 through 7); these are simply placeholders and are not meant to convey any meaning. **Users will need to update the “facdistrict” list\_name on the Choices worksheet** to match the subnational units that have been sampled for inclusion in the assessment:

1. Determine the number of subnational units included in the assessment. Users may use the appropriate subnational unit for central level entities (e.g., the subnational unit for the MoH may be the capital city) or create a ‘fake’ subnational unit for central level entities (e.g., “National entities”).
2. Insert rows under row 7 to create enough rows for all of the subnational units.
3. Copy and paste “facdistrict” in the first column of all the newly created rows.
4. Enter values for each row (e.g., D1 through DXX) in the second column.
5. Enter the names of the subnational units in the third column.

The end result should resemble:

	A	B	
1	list_name	value	label
4	facdistrict	D1	Agago
5	facdistrict	D2	Arua
6	facdistrict	D3	Bududa
7	facdistrict	D4	Bulambuli
8	facdistrict	D5	Bundibugyo
9	facdistrict	D6	Busia
10	facdistrict	D7	Buyende
11	facdistrict	D8	Hoima
12	facdistrict	D9	Kabale
13	facdistrict	D10	Kampala
14	facdistrict	D11	Kasese
15	facdistrict	D12	Kibaale
16	facdistrict	D13	Kiruhura
17	facdistrict	D14	Kisoro
18	facdistrict	D15	Koboko
19	facdistrict	D16	Luuka
20	facdistrict	D17	Luwero
21	facdistrict	D18	Lwengo
22	facdistrict	D19	Mbale
23	facdistrict	D20	Moroto
24	facdistrict	D21	Moyo

(although, of course, the individual labels will vary between countries).

## UPDATING THE NAMES OF ENTITIES INCLUDED IN THE ASSESSMENT SAMPLE

Data collectors will need to enter the name of the site where they are conducting the KPI non-Central tool data collection in response to the question listed on row 15 of the Survey worksheet. This question refers to the list\_name “facid”. In the default programming, possible for “facid” are listed in rows 8 through 11 of the Choices worksheet; these are simply placeholders and are not meant to convey any meaning. **Users will need to update the “facid” list\_name on the Choices worksheet** to match the facilities and entities that have been sampled for inclusion in the assessment:

1. Determine the number of facilities and entities included in the assessment. Each entity should be uniquely identified.
2. Insert rows under row 11 to create enough rows for all of the facilities and entities included in the assessment.
3. Copy and paste “facid” in the first column of all the newly created rows.
4. Enter values for each row (e.g., F1 through FXXX) in the second column.
5. Enter the names of the facilities and entities in the third column.
6. In the ‘filter’ column (column E), users must enter the value of the corresponding subnational unit where the facility or entity is located. For example, suppose Health Center 1 is located in District 1. In the “facdistrict” list\_name, District 1 has been given the value D1. The user should, then, enter “D1” in the ‘filter’ column. This will allow SurveyCTO to only display the names of facilities or entities in the subnational unit selected for the question on row 15 of the Survey worksheet.

The end result should resemble:

	A	B	C	D	E
1	list_name	value	label	image	filter
35	facid	F1	Health Center 1		D1
36	facid	F2	Health Center 2		D1
37	facid	F3	Health Center 3		D2
38	facid	F4	Health Center 4		D2
39	facid	F5	Health Center 5		D2
40	facid	F6	Hospital 1		D2
41	facid	F7	Hospital 2		D2
42	facid	F8	Health Center 8		D3
43	facid	F9	Health Center 9		D3
44	facid	F10	Hospital 3		D3
45	facid	F11	Health Center 11		D4
46	facid	F12	Health Center 12		D4
47	facid	F13	Health Center 13		D5
48	facid	F14	Health Center 14		D5
49	facid	F15	Health Center 15		D5
50	facid	F16	Hospital 4		D5

(although, again, the labels will vary by country and the choice of values may also vary).

## UPDATING THE FACILITIES\_VI WORKBOOK

The Facilities\_vI workbook allows SurveyCTO to access ‘text’ data about the facilities and entities and report these data. Thus, it allows SurveyCTO to record the subnational unit of a facility to be reported as “District I” rather than what is entered in the value column of the Choices worksheet (e.g., “DI”). The Facilities\_vI workbook also provides necessary information in order for the SurveyCTO skip logic to function properly. Thus, the Facilities\_vI workbook must be updated and uploaded to SurveyCTO as an attachment to the KPI non-Central tool Excel workbook. It should be saved and uploaded as a comma saved variable (.csv) file (and not, e.g., a Microsoft Excel file).

The Facilities\_vI workbook contains five columns of information:

1. **Facility Identifier:** This column contains the information from the ‘values’ column of the Choices worksheet for all “facid” list\_names.
2. **Facility Name:** This column contains the text name of the facility or entity. These two columns should be copied from the Choices worksheet (for the rows using the “facid” list\_name) in the KPI non-Central tool workbook and pasted into the Facilities\_vI worksheet to maintain consistency between the two workbooks.
3. **District:** Contains the text name of the subnational unit where the entity listed in the second column is located. For consistency, these names should be spelled the same as the names entered in the ‘label’ column of the Choices worksheet (for the rows using the “facdistrict” list\_name) in the KPI non-Central tool workbook.
4. **Facility Type:** This column contains information not available in the KPI non-Central tool workbook. Users can enter any relevant information here about the type of entity – e.g., whether the entity is a health center, hospital, referral hospital, warehouse, MoH, etc. Data entered should be spelled consistently because the type of facility is usually of interest in the analysis phase (e.g., results are usually presented disaggregated by the type of facility / entity) and this variable will be used to sort and/or filter data coming out of SurveyCTO.
5. **Facility Level:** In this column, the entity’s level of the health system should be entered. The levels of the health system DO NOT refer to one of the four levels of the health system around which the CMM Survey is structured (the CMM Survey has four levels: SDP, Referral Hospital, Intermediate and Central Warehouse, and Central / MoH Level, each of which has separate sets of questions and maturity scoring).

However, users are encouraged to use the same levels as used in the CMM survey in the KPI non-Central tool **with one exception**. In order for the correct set of questions to be asked at each entity, the KPI non-Central Tool must distinguish ‘Warehouse’ and ‘Central Warehouse’ from other levels. ‘Central Warehouse’ is not a distinct health system level in the CMM Survey. Central Warehouses are treated differently from other warehouses in the KPI non-Central tool because the ‘Upstream Order Data’ Table is not filled in for Central Warehouses (but is filled in for intermediate warehouses).

**Note** that the spelling of these levels (Warehouse and Central Warehouse) **MUST** exactly match the data entered in the default programming of the Facility\_vI workbook: “Warehouse” and “Central Warehouse”. “Warehouse ” and “Ware house” (with extra spaces) will cause



errors in the SurveyCTO code. For this reason, users should copy and paste the existing text in the default Facilities\_v1 as appropriate (rather than typing in the data).

The resulting file should resemble:

	A	B	C	D	E
1	Facility Id	Facility Name	District	Facility Type	Facility Level
2	F1	Health Center 1	District 1	Health Center	SDP
3	F2	Health Center 2	District 1	Health Center	SDP
4	F3	Health Center 3	District 2	Health Center	SDP
5	F4	Health Center 4	District 2	Health Center	SDP
6	F5	Health Center 5	District 2	Health Center	SDP
7	F6	District Hospital 1	District 2	Hospital	SDP
8	F7	Hospital 1	District 2	Referral Hospital	Referral
9	F25	Hospital 2	District 3	Referral Hospital	Referral
10	F26	Health Center 6	District 4	Health Center	SDP
11	F27	Health Center 7	District 4	Health Center	SDP
12	F28	Provincial Warehouse 1	District 4	Intermediate Warehouse	Warehouse
13	F110	CMS	District 5	Central Warehouse	Central Warehouse

(with appropriate identifiers, facility names, districts, types, and levels entered).

## UPDATING THE MONTHS\_v1 WORKBOOK

The Months\_v1 workbook allows SurveyCTO to access ‘text’ data about the names of the months over which historical data will be collected for the KPI non-Central tool and report these data. Users need to enter the names of the six months prior to the month in which data is being collected for the assessment (or the names of the six months for which historical data will be collected) in the worksheet in column B (“Months”). Column A (“Month ID”) lists the numbers 1 through 6 and should not be changed. The final result should resemble:

	A	B	
1	Month ID	Months	
2		1 February	
3		2 March	
4		3 April	
5		4 May	
6		5 June	
7		6 July	

(with the names of the appropriate months listed in cells B2:B7).

## UPDATING THE TRACER COMMODITIES\_v1 WORKBOOK

The “Tracer Commodities\_v1” worksheet contains five columns:

**product\_key** (Column A): Numeric code for each tracer commodity, generally starting with 1 and increasing sequentially.

**Product Name** (Column B): The name of the tracer commodity, as used in the assessment.

**Product Dosage** (Column C): The specific dosage of the commodity listed under Product Name to be used for the assessment (e.g., 100mg, 5 mg/ml, etc.).

**Product Category** (Column D): Optional column listing the category of the commodity (e.g., by program or type of commodity).

**Product Unit** (Column E): The unit for which data collectors should enter data (e.g., Bottle of 1,000 tabs, 1 capsule, 100ml bottle, sachet, 6x4 pill pack, etc.). What is entered here should typically be the standard unit used by most entities in the supply chain in order to enable ease of data extraction, collection, and entry.

The sub-section “Tracer Commodities” in the section “REVIEW AND FINALIZE THE SURVEY CTO CODE” of the NSCA 2.0 Implementation Guide describes the process of selecting tracer commodities for use in the assessment. Once the final list of tracer commodities has been determined, the information about the tracer commodities should be entered in the appropriate columns of the “Tracer Commodities\_v1” worksheet. The final should resemble:

	A	B	C	D	E
1	product_key	Product Name	Product Dosage	Product Category	Product Unit
2	1	Amoxicillin Capsule	250mg	Essential Drug	Bottle of 1,000
3	2	Arthemether/Lumefantrine 6x1	20/120mg	Anti-malarial	6x1 packet
4	3	Malaria RDT	Test	Diagnostic test kit	Each
5	4	Cotrimoxazole	960mg	Drugs against Opportunistic Infection	Bottle of 1,000
6	5	Depo Provera	Injection	Family Planning	Each
7	6	Oxytocin Injection	10ui/ml	Emergency Obstetrical Care/MCH	Each
8	7	Determine RTK	Test	Diagnostic test kit (HIV)	Each
9	8	Magnesium Sulphate 50%	Injection	Emergency Obstetrical Care	Each
10	9	TDF+3TC+EFV	300mg+300mg+600mg	ARV	Bottle of 30
11	10	Gentamycin 80mg/2ml	Injection	Essential Drug	Each
12	11	Oral Rehydration Solution (ORS)	Sachet	Essential Drug	Sachet

(with the appropriate assessment-specific information entered). Note that the default template lists 10 commodities but more / fewer commodities is possible.

## UPDATING TRACER COMMODITIES INFORMATION ON THE CHOICES WORKSHEET

The Product Names and the Product Units of the tracer commodities need to also be entered on the Choices worksheet of the KPI non-Central tool (in addition to being entered in the Tracer Commodities\_v1 worksheet).

First, rows 15 through 24 (in the default programming) of the choices worksheet lists the Product Names of the tracer commodities, using the list\_name “tracers”. If more than 10 tracer commodities are being used for the assessment, additional rows should be added below row 24 and labelled with the ‘tracers’ list\_name (column A) (if less than 10 tracer commodities are being used for the assessment, then rows should be deleted). The ‘value’ column (column B) should also be updated so that all rows with ‘tracers’ have a value. The names of the tracer commodities should then be entered in the ‘label’ (column C) column. These names should (a) match the names used in the Tracer Commodities\_v1

worksheet and (b) be entered in the same order as they are entered in the Tracer Commodities\_v1 worksheet.

Second, rows 34 through 53 (in the default programming) of the choices worksheet lists the Product Units of the tracer commodities, using the list\_name “unit”. These rows contain two sections; the first block lists the product units for each of the tracer commodities (in the default programming, there are 10 tracer commodities). The second section (starting on row 44 in the default programming) then enables users to enter a different unit if the data they are collecting is not presented in the default units. This is labelled ‘other’; there should be one ‘other’ for each of the tracer commodities used in the assessment.

If more than 10 tracer commodities are being used for the assessment, additional rows should be added below rows 43 AND 53, and labelled with the ‘unit’ list\_name (column A) (if less than 10 tracer commodities are being used for the assessment, then rows should be deleted). For example, if 12 tracer commodities are being used for the assessment, two rows should be inserted below row 43 and 2 additional rows inserted below row 53. The ‘value’ column (column B) should also be updated so that all rows with ‘tracers’ have a value. Typically, the rows before the ‘other’ label starts should be numbered consecutively, with the values for ‘other’ labels all having the same ‘value’. The units (Product Units) of the tracer commodities should then be entered in the ‘label’ (column C) column (retaining the ‘other’ label).

Finally, in the ‘filter’ column (column E), users should enter the number corresponding to the ‘product\_key’ in the Tracer Commodities\_v1 worksheet in the first section of the ‘unit’ list\_field. The, the numbers should repeat for the ‘other’ labels. Thus, each ‘product\_key’ number should be entered twice – once in the row of the appropriate unit for each tracer commodity and once in a row for ‘other’. This allows data collectors, when prompted, to either select the default product unit for a tracer commodity, or ‘other’ if the data are not in the default product unit (users will then be prompted to enter the unit if the select ‘other’).

## UPDATING TRACER COMMODITIES INFORMATION ON THE SURVEY WORKSHEET

The last step in updating the KPI non-Central tool to enable functionality of the KPI non-Central tool is to update the ‘repeat\_count’ column of the Survey worksheet. *The default programming assumes that there are 10 tracer commodities, and this step only needs to be done if the assessment is NOT using 10 tracer commodities.* The coding is set up so that the same questions are asked of each tracer commodity. Rather than replicating the coding for each tracer commodity, the default KPI non-Central tool uses the ‘repeat’ function of SurveyCTO. The ‘repeat’ function allows each question / data collection prompt (or, in this case, block of questions / data collections) to be repeated a given number of times. However, SurveyCTO needs to be ‘told’ how many times it should repeat each question / data collection prompt (which is done in the ‘repeat\_count’ column or Column O of the Survey worksheet).

Thus, users need to update the default numbers in the following cells:

O44  
O56  
O73  
O85

O103.

By default, each of these cells contains '10'. Users should replace this '10' with the number of tracer commodities being used in the assessment.

### **UPDATING WORDING ON THE SURVEY AND CHOICES WORKSHEET**

Some of the wording on the survey worksheet is *by design* intended to be placeholders that the assessment team will need to update before using the KPI non-Central tool.

This includes:

1. The default programming for the year of the assessment. This is listed on the survey worksheet as '20XX'. Users will need to update the term '20XX' to reflect the year of the assessment. The term 20XX appears in Cells C143, C204, C207, C210, C212, C215, C217, C220, C222, C225, C227, C230, C232, C344, D344, C362, and D362. Alternatively, users can chose to find '20XX' and replace with the appropriate year using the Ctrl + H function in Microsoft Excel.
2. Cell C138 on the survey worksheet lists instructions to collect data on orders only from '<<Name of warehouse>>' This phrase should be updated to reflect the appropriate instructions for the assessment.
3. Cell D141 on the survey worksheet lists the expected number of orders that should occur in the six month timeframe of the historical data collection period. This may need to be updated based on the delivery schedule of the country of the assessment.
4. Cell C61 on the Choices worksheet lists 'local currency unit'; users should replace this phrase with the name of the currency used in the country where the assessment is occurring.

## OPTIONAL CHANGES THAT LIKELY WILL BE NEEDED FOR MOST NSCAS

### CHANGING THE WORDING OF QUESTIONS TO FIT THE COUNTRY-SPECIFIC CONTEXT

Assessment teams and stakeholders should review the KPI non-Central tool instrument in the preparation stages of an NSCA. During this review, some of the terminology or wording of questions may want to be refined in order to make questions more easily understood by respondents (and data collectors). For example, the default programming routinely uses the phrase ‘stock card’, but in some countries this may be referred to as a ‘bin card’ (or something else). Users may change the wording of these prompts for data collection as they see fit. Another example may be the data collection prompt in cell C189 on the survey worksheet, which lists ‘central warehouse’, but users may want to enter the specific name of this entity for data collection.

To change the wording of a question, users should change the text in the ‘label’ column (Column C) of the Survey worksheet.

Cells E291 through E296 on the survey worksheet contain default job titles for supply chain positions. These title may need to be updated and can simply be changed as needed (note that job titles can also be added in any of the cells in E291 through E305).

Users may also elect to change some of the answers on the Choices worksheet. Most notably, the choices for the list\_name “facilitytype” (rows 56 to 60) may need to be updated to reflect the proper nomenclature of the country being assessed. Users should change the text in the ‘label’ column; note that rows can be inserted after row 59 if more types of facilities are needed.

Note that wording changes should serve to *clarify* questions for a particular audience, but should not *alter the underlying meaning* of a question. If the underlying meaning of a question is changed, then the answers may no longer be appropriate and the maturity scoring of the question may also no longer be appropriate.

### OMITTING OPTIONAL KPIS

Data collection tables 4 and 5, as well as part of data collection table 6 (related to staff vacancy rates), collect data for optional (non-Core) KPIs, and assessment teams, in consultation with stakeholders, may decide not to collect these data for an assessment. Thus, the KPI non-Central tool may need to be modified so as not to prompt users to collect or enter data for these tables (or sections of tables). There are two ways remove these items from the data collection tool:

1. Go to column J (‘disable’) on the survey worksheet of the appropriate rows and type ‘yes’ to disable the questions.

2. Select the appropriate rows [198 – 239 for Data collection table 4 on costs of warehouse and distribution operations, 240 – 284 for Data collection table 5 for temperature excursions, and 307 – 342 for staff vacancy rates] and delete them from the survey worksheet.

The first method is recommended, especially if there is any doubt as to whether or not data for an optional KPI will be collected.

## **ADVANCED CHANGES THAT MAY BE NECESSARY BUT SHOULD BE DONE WITH CAUTION**

### **ADDING QUESTIONS**

Assessment teams may have a particular topic or problem that they want to gather further information about but that is not included in the KPI non-Central tool. Extra questions can be added to the survey without compromising the SurveyCTO code by adding rows in the appropriate place on the Survey worksheet and filling in the required information (understanding how SurveyCTO coding is written will be necessary to complete this step). Answer categories can be added to the end of the Choices worksheet if needed. Care should be taken to ensure that the added questions do not make the data collection process overly long (i.e., a limited number of questions should be added).

When adding questions, users should consider the following:

- I. The “KPI non-central analysis template” will not produce any results for the added questions. Analysis of additional questions is the responsibility of the analysis team.

The numbers (in the ‘name’ column or column B of the Survey worksheet) of existing questions cannot be changed to maintain the functionality of the “KPI non-central analysis template”. That is, users cannot add a question in the middle of a section and then re-sequence the numbering of the remaining questions in a section and retain functionality of the “KPI non-central analysis template”. For example, if the assessment team wants to insert a question after question cost I 1, they should NOT number the new question cost I 2 and renumber the remaining costXX series of questions. Rather, a new number (e.g., ‘cost I 1a’) should be used for the inserted question.