

FRED OFFICE DRUG MATCHING

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INTRODUCTION

The Unmatched Script report displays information about prescription drugs dispensed, including whether each drug dispensed was matched a to a Fred Office item at the time the script was sold at point-of-sale (POS).

This document provides step-by-step instructions on:

- Using the Unmatched Script report to review unmatched drugs.
- Matching unmatched drugs to Fred Office items.
- Performing a stock adjustment to correct your stock-on-hand (SOH) levels.
- () Drug Match should be run once per week and directly after performing a dug update. This will ensure that your dispensing correctly tracks your POS data and that SOH and Gross Profit for dispense items is accurate.

REVIEWING UNMATCHED DRUGS

Run the Unmatched Script Report

- 1. In Fred Office, go to **Reporting > Script Reports > Unmatched Scripts**.
- 2. Double-click Unmatched Script Report.
- 3. On the **Report Filter(s)** panel, enter the required **Start** and **End** dates.
- () We recommend always using the date you had Fred Office installed as the **Start** date.

Report Filter(s)					P
Basic Filters					
Transaction Be Select the ran	tween ge activity sho	uld be	e filtered on		
Start	23/01/2014	-	12:00:00 AM	¢	
End	23/07/2014	Ŧ	11:59:59 PM	¢	
Predefined	Custom			-	

4. Click Run Report.

Print the Unmatched Script report

- 1. Click the **Drug Name** column heading, to sort the unmatched scripts by drug name.
- 2. Click **Print Preview**. The preview pane is displayed.
- 3. **Print** the report and keep it on file.

Save and schedule the Unmatched Script report

- 1. Change the filter **Start** and **End** dates to use the **predefined** option and set it to **6 Months to date**.
- (i) This date range will vary, depending on the frequency with which you want the report to be scheduled and updated. Once this report is cleared, you will need to run the report for the time interval you want to maintain and review the unmatched drugs.
- 2. Click Run Report.
- 3. Click Save Report As, then enter a name for the report; for example, "Current Unmatched Scripts".
- (i) By default, the report has the same name as the system report. You cannot save the report with the same name as a system report.
- 4. If required, set sharing options, to share the report with staff members or security roles.
- 5. Click **OK**.
- 6. Close the report.
- 7. Click User Reports.
- 8. Click the report you have just saved.
- 9. Click Schedule Report.
- 10. Click Enable Schedule.
- 11. Fill out the fields to specify when and how often you want to run the report.
- 12. Click the **Email** tab.
- 13. Enter the email addresses that the report is to be automatically send to. Separate multiple email addresses with a semicolon (;).
- 14. Click **OK**.

Put all unmatched scripts into a Drug Group

You will use the drug group later in this procedure, to help correct your stock-on-hand.

- 1. On the Report: Umatched Scripts window, click anywhere in the **Report** panel that shows the unmatched scripts.
- 2. To select all the drugs displayed, press [Ctrl+A].



3. Right-click on one of the selected drugs, then select **Add to Group**, then select **Create New Drug Group...**

Report	Report								
Drag a column hea	Drag a column header here to group by that column								
Drug Code	Drug Name		Drug Form	Drug S	trength	n Supplier Co	de 1	PDE 1 #	
DER 5	DERMACORT		OINT	1% 50g)				
FER1	FERA		TAB	2.5mg		API		363502	
GOL1	GOLD 50	0	Open Drug						
GL11	GOLYTELY	192	Match Item		2x2l				
HOL9	HOLLIHESIVE	-							
MINH1	HOMATROPIN	8	Create Item						
JEV3	JEVITY WITH F	÷	Drug QuickActi	ion					
PANE10	PANADEINE EX	9	Add To Group	•	9	Create New Dru	ig Gro	up	
ROTA3	ROTARIX	-	URAL-VAC	TWF		Add To Existing	Drug	Group	
SAPH2	SAPHRIS		SL-WAF	10mg	db	Add TO Existing	Drug	oroupin	
VIT7	VITAMIN E		CRM	75g					
YOMA1	YOMAX 250		CAP	250mg		API		375551	

The New Group window is displayed.

4. Enter a **Name** and **Description** for your new drug group.

🥙 Ne	w Group	×
8	You must choose a You can also enter	friendly name that will identify this group. a description which can describe this group in more detail.
	Name	Drugs to match
	Description	17/10/2014 These drugs need to be matched
		OK Cancel

5. Click **OK**.



6. Your new drug group is displayed.

🖀 Group - Drugs to match	
<u>File E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp	>
🗉 🔚 Save and Close S <u>a</u> ve 👚 🤍 🔞 Add Entry 🔮	🔓 Search Bar 🕨
Group Details	
Name Drugs to match	Type Drug
Description 17/10/2014 These drugs need to be matched	
Group Entries	
Code	Name
Search	Search
DER5	DERMACORT
GOL1	GOLD 50
GL11	GOLYTELY =
HOL9	HOLLIHESIVE
MINH1	HOMATROPINE
VIT7	VITAMIN E
JEV3	JEVITY WITH FIBRE
ROTA3	ROTARIX
SAPH2	SAPHRIS
FER1	FERA
	V

7. Click Save and Close.



MATCHING UNMATCHED DRUGS

Review and correct the unmatched scripts

Report					
Drag a column header her	re to group by that column				
Drug Code	Drug Name	Drug Form	Drug Strength	Supplier Code 1	PDE 1 #
APOA5	AMOXYCILLIN (APO)	CAP	500mg		406856
ATOR18	ATORVACHOL	ТАВ	20mg	SYM	369829
M&A2	MORPHINE & ASPIRIN	MIXT	200mL		
PANA6	PANADEINE	CAP	500mg/8mg		
SIMV82	SIMVASTATIN (AURO)	TAB	40mg	SYM	023418
SOMA22	SOMAC	SACH	40mg	SYM	424269

There are two options for correcting an unmatched script:

- Match a dispensed drug to an existing Fred Office item
- Create an item, then match a dispensed drug to it

Match a dispensed drug to an existing Fred Office item

1. Right-click a drug you want to match to a Fred Office item, then click **Match Item**.



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The available items search window is displayed.

đ	🖰 Available Items 👘							х
	Search Criteria				Selected			
	Alias, code or descrip	tion contains	somac	Search 💌	Item Type	Code	Description	
	Item Type		Any Item Type 👻]				
	Active State		Any State 👻]				
	Search Results							
	Item Type	Code	Description	▲				
	🦻 Standard	284149	SOMAC 20MG TAB 30 BLISTER					
	📁 Standard	284130	SOMAC 40MG TAB 30 NEW BLISTER					
	📁 Standard	407097	SOMAC 40MG TAB 5 NEW BLISTER					
	📁 Standard	296465	SOMAC GRAN 40MG 30					
	📁 Standard	284394	SOMAC H/BURN RLF 20MG TAB 14 t					
	📁 Standard	284408	SOMAC H/BURN RLF 20MG TAB 7					
	🧊 Standard	624775	SOMAC POWDER INJECTION 40MG					
						0	K Car	ncel

- 2. In the **Alias, code or description contains** text box, enter all or part of the drug's alias, code, or description.
- () You will get more useful search results if you avoid making the search term too specific. For example, Somac rather than Somac sachets 40mg 30 pack.

3. Click Search.

Any items found are displayed in the **Search Results** section.

(i) If no items are found, try changing your search term. If the required item doesn't exist in your Fred Office database, create it. For details, see "**Create an item, then match a dispensed drug to it**".



4. In the **Search Results** section, click to select the correct Fred Office item, then click the right arrow button to move it into the **Selected** section.

SOMA22	SOMAC	SACH		40mg			SYM	424269	
🖱 Available Items									x
Search Criteria						Selected			
Alias, code or description	n contains	somac	Search	-		Item Type	Code	Description	
Item Type		Any Item Type 🔹 👻				📁 Standard	296465	SOMAC GRAN 40MG 30	
Active State		Any State 🔹							
Search Results					>				
Item Type Co	ode	Description							
📁 Standard 284	34149	SOMAC 20MG TAB 30 BLISTER							
📁 📁 Standard 284	34130	SOMAC 40MG TAB 30 NEW BLISTER							
📁 📁 Standard 🛛 403)7097	SOMAC 40MG TAB 5 NEW BLISTER							
📁 Standard 290	96465	SOMAC GRAN 40MG 30			<				
📁 📁 Standard 🛛 284	34394	SOMAC H/BURN RLF 20MG TAB 14 t							
📁 📁 Standard 🛛 284	34408	SOMAC H/BURN RLF 20MG TAB 7							
📁 🗊 Standard 624	4775	SOMAC POWDER INJECTION 40MG							
								OK Ca	ncel

- 5. Click **OK**.
- 6. Repeat steps **1** to **5** until you have matched all the unmatched drugs from the report.

Create an item, then match a dispensed drug to it

- () Only use this process if you have not been able to successfully Match a dispensed drug to an existing Fred Office item.
- 1. Right-click the drug you want to match to a Fred Office item.

2. Click Create Item.

Report					
Drag a column heade	r here to group by that column				
Drug Code	Drug Name		*	Drug Form	
APOA5	AMOXYCILLIN (APO)	CAP			
ATOR18	ATORVACHOL	_		TAR	
MBA2	MORPHINE & ASPIRIN	۲	Open	Drug	
PANA6	PANADEINE	1	Match	Item	
SIMV82	SIMVASTATIN (AURO)		Create	Item	
SOMA22	SOMAC	0	Davad	Suidely & atting	_
		SP	Drug	JuickAction	
		9	Add T	o Group	\mathbf{F}



A new item stockcard is displayed and is populated with the drug information.

Item ATORVACHOL TAB 20mg				- = x						
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp				.						
🗧 🔚 Save and Close 🛛 S <u>a</u> ve 🛛 👚	🔚 Save and Close Save 👚 🐥 QuickPad 😚 Store Check Label Qty 🔤 1 🗘 Print Label 💣 Queue Label 👻									
General «	Details		Pricing							
General	Item Code	510 +	Price Type	Non Fixed Price						
Aliases	Item Description	ATORVACHOL TAB 20mg	GST	No GST 👻						
Substitutes	Extended	×	Purchase Tax	GST 👻						
Options	Description		Retail	\$0.00						
	Debailting 1		Cost Ex	\$0.00						
	Detail Line 1		Margin %	0.00 %						
	Detail Line 2		Markup %	0.00 %						
	Detail Line 3		Price Guide							
	Item Location	No Describeration	Price 📵	N/A						
	Ceberemu		Margin %	N/A						
	Category		Markup %	N/A						
	Laber remplace	S WIDE LADELS	Inventory							
Concert			SOH	0.00 ···						
General			Committed	0.00						
Inventory & Ordering			Available	0.00						
Rricing & Discounts	Remarks		Qty on Order	0.00						
30 ······		1 I	Item Type	Standard -						
Usage										
Junks										

- 3. In the left-hand navigation menu, click Links.
- 4. In the **Links** menu, click **AppCAT**.



5. In the AppCAT Matching panel, click Manual.

The Manual Matching panel is displayed.

Manual Matching	ually search for an item in the AppCAT catalogue. Choose which of the returned results fro t matches the current item.	om your search
	Match Results	
	Search For atorvachol in Item Description 👻 🗌 Any part	Search
	Item Description	Match
	ATORVACHOL TAB 10MG 30	Matth
	ATORVACHOL TAB 20MG 30	
	ATORVACHOL TAB 40MG 30	
	ATORVACHOL TAB 80MG 30	

- 6. In the **Search For** text box, enter all or part of the drug's description.
- () You will get more useful search results if you avoid making the search term too specific. For example, Somac rather than Somac sachets 40mg 30 pack.

7. Click Search.

Any items found are displayed.

- (i) If the required item does not display in the search results, try another search term; or alternatively, try searching by **Alias** or **Re-order number**.
- 8. Click to select the drug you want to match.
- 9. Click Match.

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Apply any relevant AppCAT updates

Now the item is matched to AppCAT there might be updated AppCAT information that you can apply to the item's stockcard. In the **Change Detail** panel, review the drug details displayed, then apply any relevant differences from the AppCAT listing.

At the minimum, we recommend you apply the following changes:

- Alias New
- Supplier Item New (for any relevant suppliers)

Match Detail							
AppCAT Item ATORVACHOL TAB 20MG 30 Unmatch							
Change Detail							
- enango botan	(I		Colora All				
Change '	Local Value		Delect All				
Item - Description Change	ATORVACHOL TAB 20mg	ATORVACHOL TAB 20MG 30	Clear				
Item - rax change	No Gol		Apply				
Item - New Manuracturer	No Manuracturer						
Supplier Item - New		83036 ASCENT PHARMACEUTICALS (GENEP					
Supplier Item - New		83036 CENTRAL HOSPITAL SUPPLIES (VIC)					
Alias - New		9336666005334					
Alias - New		933666005334					

- 1. Click to highlight a change you want to apply.
- 2. Click Apply.
- () To select multiple changes to be applied at the same time, hold down [Ctrl] while you click the changes.

Match Detail				
AppCAT Item ATORVACHOL TAB 20MG 30 Unmatch				
Change Detail				
Change	Local Value	AppCAT Value	Select All	
Item - Description Change	ATORVACHOL TAB 20mg	ATORVACHOL TAB 20MG 30	Clear	
Item - Tax Change	No GST	GST	Apply	
Item - New Manufacturer No Manufacturer		CENTRAL HOSPITAL SUPPLIES	cibbu)	
Supplier Item - New		83036 ASCENT PHARMACEUTICALS (GENEP		
Supplier Item - New		83036 CENTRAL HOSPITAL SUPPLIES (Vic)		
Alias - New		9336666005334		
Alias - New		933666005334		

The prompt *Apply changes selected?* is displayed.

- 3. Click Yes.
- 4. Once all changes are completed, click **Save and Close**.
- () You might also want to update further information in the stockcard. For example, the item description; department, GST details, ROU scheme, and so on.



Run the Drug Usage (Pivot Report)

- 1. Go to **Reporting > System Reports > Script Reports**.
- 2. Double-click the Drug Usage (Pivot Report).
- 3. On the **Report Filters** panel, enter the **Start** and **End** dates.
- () We recommend always using the date you had Fred Office installed as the **Start** date.

Report Filter(s)					P
Basic Filters					
Transaction Be Select the ran	tween ge activity sho	uld be	e filtered on		
Start	23/01/2014	•	12:00:00 AM	÷	
End	23/07/2014	Ŧ	11:59:59 PM	÷	
Predefined	Custom			Ŧ	

- 4. In the **Drug Group Selection** field, click to select the drug group you created earlier (for details, see "**Put all unmatched scripts into a Drug Group**").
- 5. Click the **Drug Description** column heading to sort the list by **Drug Description**.
- 6. Click **Run Report**.

Fred Office runs the report.

7. **Print** the Drug Usage (Pivot Report). Keep the printed report; you will use it when you correct your stock-on-hand.

MANUALLY CORRECTING SOH

After matching drugs to existing Fred office items, you will usually need to perform a manual stock adjustment.

- (\mathbf{i}) This adjustment is not usually necessary for drugs that had no matches in Fred Office (that is, drugs for which you had to create a new item in Fred Office before matching), because their SOH will usually be **0**.
- 1. Click Inventory > Drugs.
- 2. Take the printout of your Drug Usage (Pivot Report), and search Fred Office for the first drug on the list using the Drug Code.
- 3. Double-click to open the relevant drug card.
- 4. Click the **Item** tab.
- 5. Click **View** to open the corresponding stockcard.
- **(i)** If there is no item description in the **Linked Item** field, this means this drug card needs to be matched to a stockcard. You will need to match the item before continuing. For more details, see "Matching unmatched drugs".
- 6. Click the browse button (...) to the right of the **SOH** field.

		Manual Adjustment		
		🟥 Enter the details of the adjustment below.		
		Quantity	1.00	Reason Unmatched Drug SOH Correction
Inventory		-		<u></u>
SOH	2.00	: Remarks		
Committed	0.00	:		
Available	2.00]		
Qty on Order	0.00			
Item Type	Standard 🔹			OK Cancel

- 7. Enter the new **SOH** value.
- 8. If required, select an **adjustment reason**.

(i) You can create your own stock adjustment reason codes. For details, see "Creating a reason code".

- 9. If required, enter a **remark**.
- 10. Click **OK**.

In

- 11. Click Save and Close.
- 12. Repeat steps **3** to **11** for all items on the printout.



Creating a reason code

1. Go to Tools > Reason Codes > Reason Code Management.

New Reason Code	
Reason Code	
Code	11 +
Description	Unmatched Drug SOH Correction
Туре	Manual Stock Adjustment 🛛 🗸 🗸
	Prevent this reason code from being used
	OK Cancel

2. Click Add.

The New Reason Code window is displayed.

- 3. To generate the new code, click the + to the right of the **Code** field.
- 4. In the **Description** text box, enter the full description of the code.
- 5. In the **Type** drop-down list, select the appropriate reason code type. For example, in the screenshot above, we have selected **Manual Stock Adjustment**.
- 6. Click **OK**.
- 7. Click **OK**.