

USER GUIDE



Drug Matching **USER GUIDE**

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FRED

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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.

Note: If your pharmacy has recently converted to Fred Office, we recommend that you follow the procedures in this document **every day for the first two weeks**.

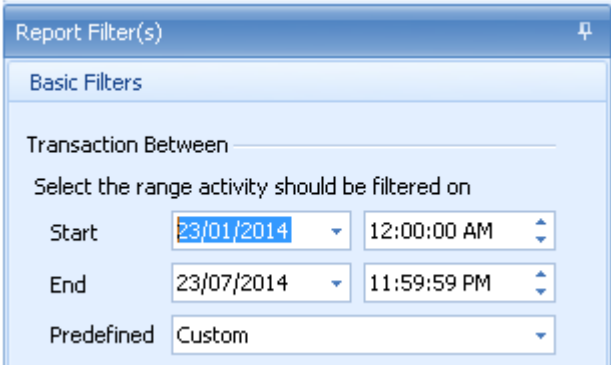
After you have been using Fred Office for two weeks, follow the procedures in this document **once per week**, to help ensure that your dispensing correctly tracks your POS data.

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.

Note: We recommend always using the date you had Fred Office installed as the **Start** date.



Report Filter(s)

Basic Filters

Transaction Between

Select the range activity should be filtered on

Start 23/01/2014 12:00:00 AM

End 23/07/2014 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**.

Note: 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”**.

Note: 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: Unmatched Scripts window, click anywhere in the **Report** panel that shows the unmatched scripts.
2. To select all of 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					
Drag a column header here to group by that column					
Drug Code	Drug Name	Drug Form	Drug Strength	Supplier Code 1	PDE 1 #
DER5	DERMACORT	OINT	1% 50g		
FER1	FERA	TAB	2.5mg	API	363502
GOL1	GOLD 50				
GL11	GOLYTELY				
HOL9	HOLLIHESIVE				
MINH1	HOMATROPINI				
JEV3	JEVITY WITH P				
PANE10	PANADEINE EX				
ROTA3	ROTARIX	ORAL-VAC	1ML		
SAPH2	SAPHRIS	SL-WAF	10mg		
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.

New Group

You must choose a friendly name that will identify this group.
You can also enter a description which can describe this group in more detail.

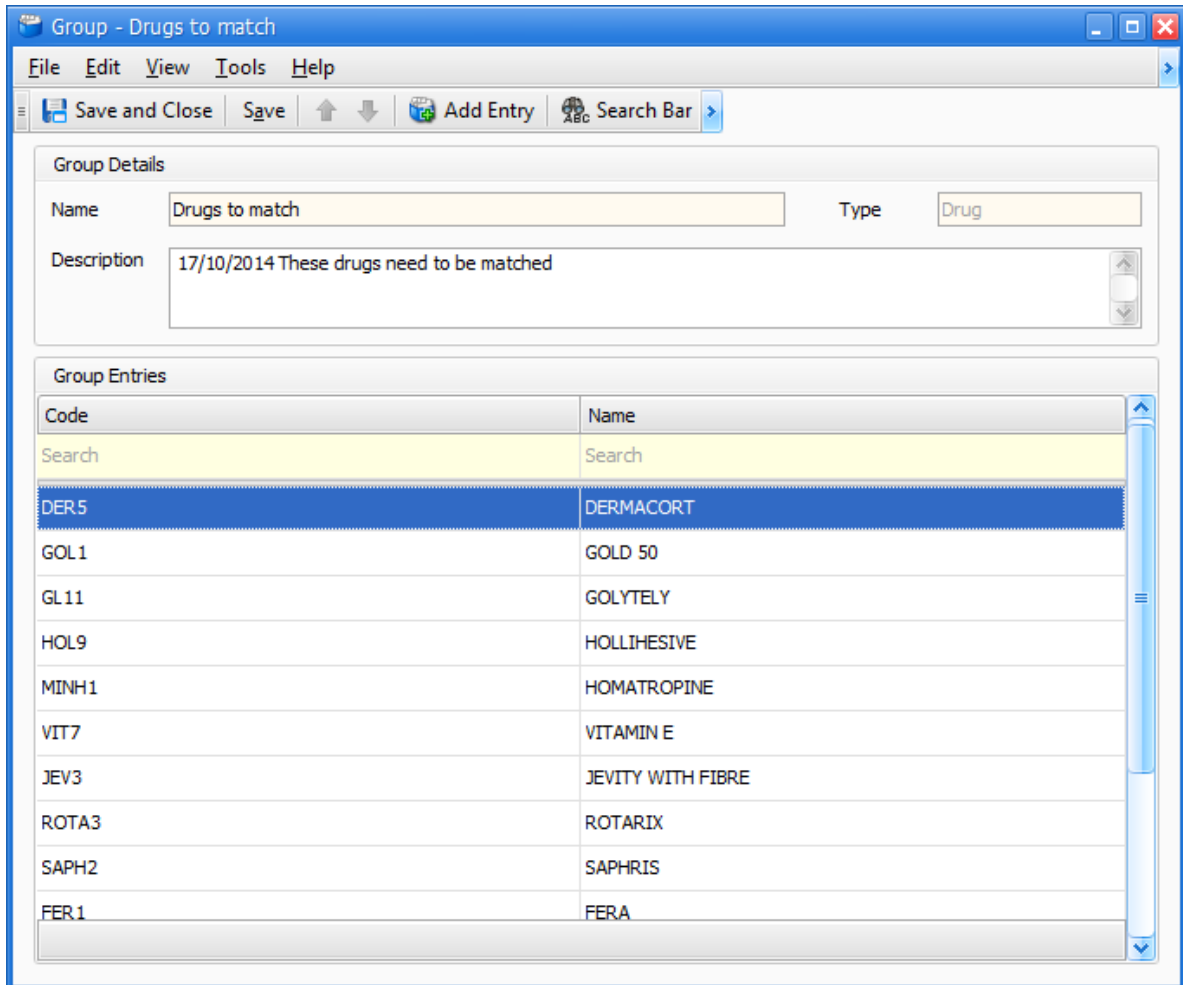
Name: Drugs to match

Description: 17/10/2014 These drugs need to be matched

OK Cancel

5. Click **OK**.

6. Your new drug group is displayed.



7. Click **Save and Close**.

MATCHING UNMATCHED DRUGS

Review and correct the unmatched scripts

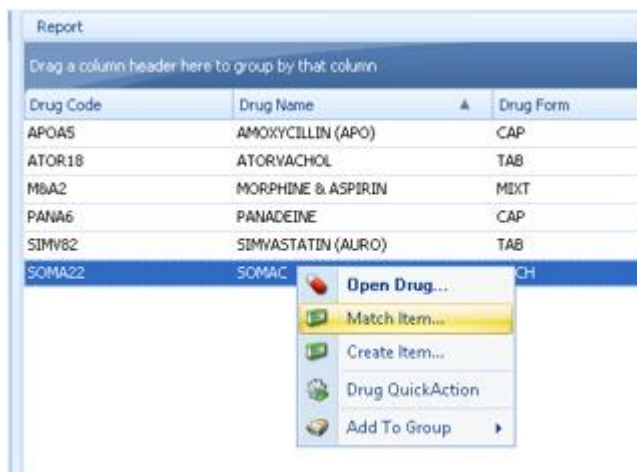
Report					
Drag a column header here to group by that column					
Drug Code	Drug Name	Drug Form	Drug Strength	Supplier Code 1	PDE 1 #
APOA5	AMOXICILLIN (APO)	CAP	500mg	SYM	406856
ATOR18	ATORVACHOL	TAB	20mg	SYM	369829
M&A2	MORPHINE & ASPIRIN	MIXT	200mL		
PANA6	PANADEINE	CAP	500mg/8mg		
SIMV82	SIMVASTATIN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

There are two options for correcting an unmatched script:

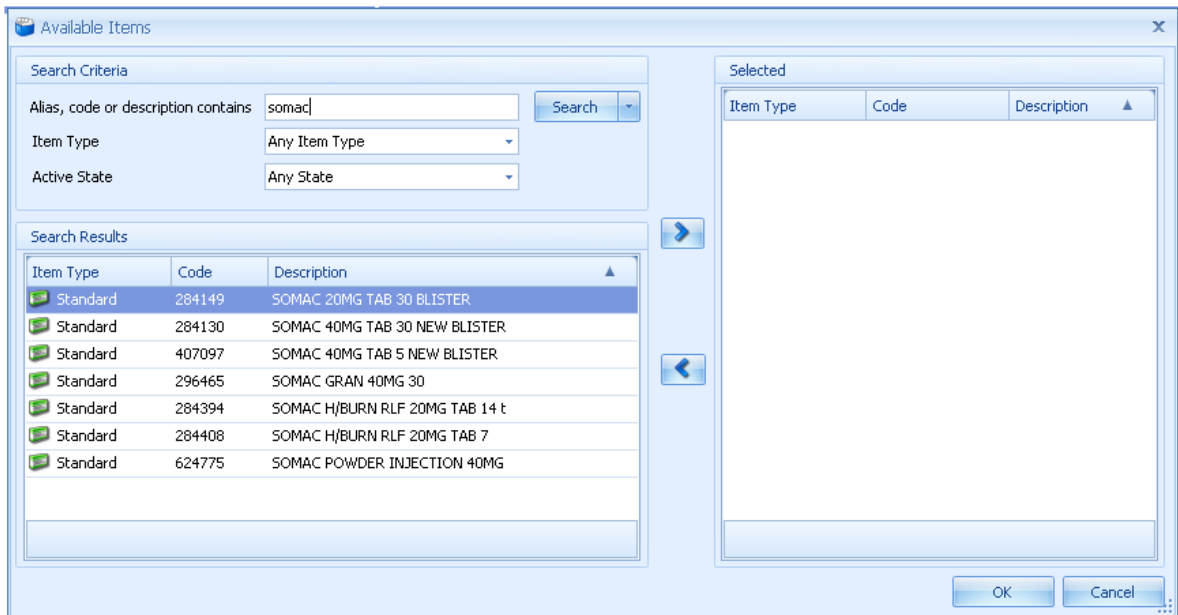
- Match a dispensed drug to an existing Fred Office item
- Create an item, then match a dispensed drug to it

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**.



The available items search window is displayed.



2. In the **Alias, code or description contains** text box, enter all or part of the drug's alias, code, or description.

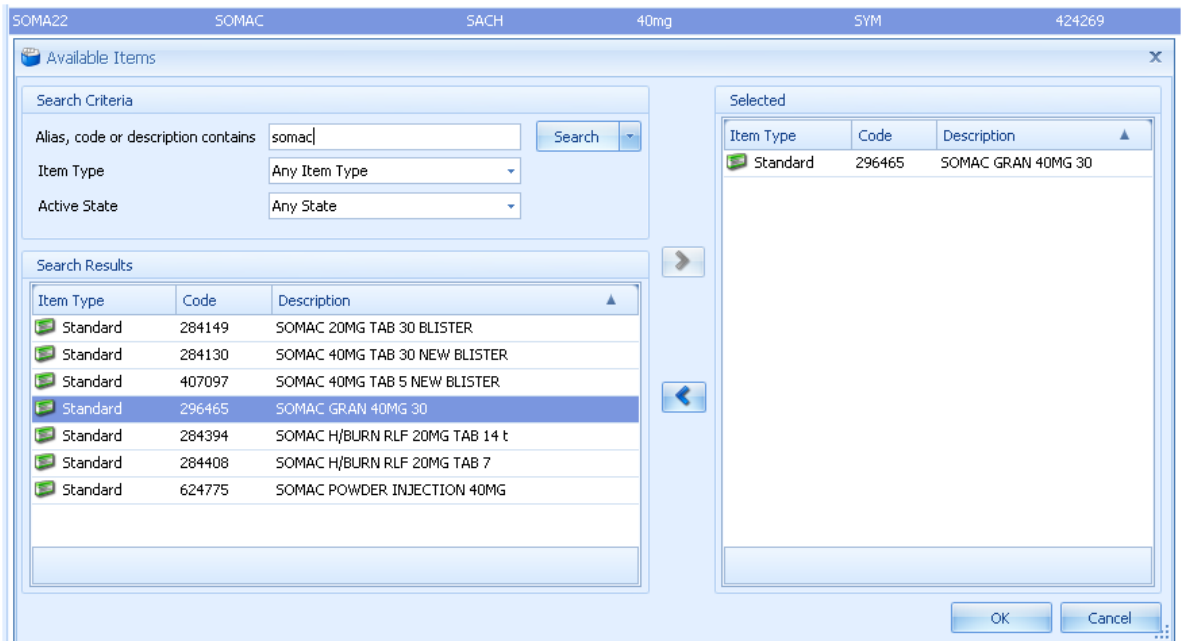
Note: You will get more useful search results if you avoid making the search term too specific. For example, *Somac* rather than *Somac sachets 40mg 30 pack*.

3. Click **Search**.

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

Note: 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”**.

- 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.

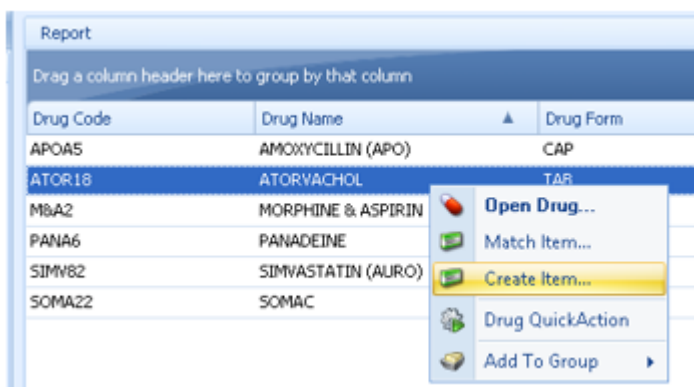


- Click **OK**.
- Repeat steps 1 to 5 until you have matched all of the unmatched drugs from the report.

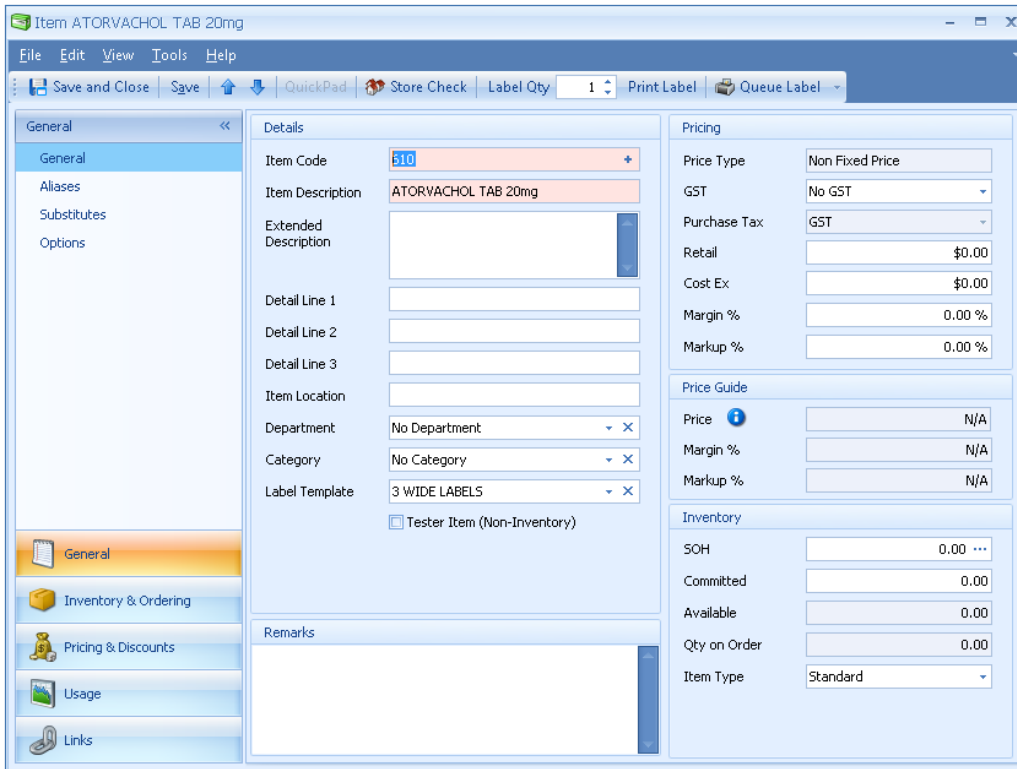
Create an item, then match a dispensed drug to it

Note: Only use this process if you have not been able to successfully **Match a dispensed drug to an existing Fred Office item**.

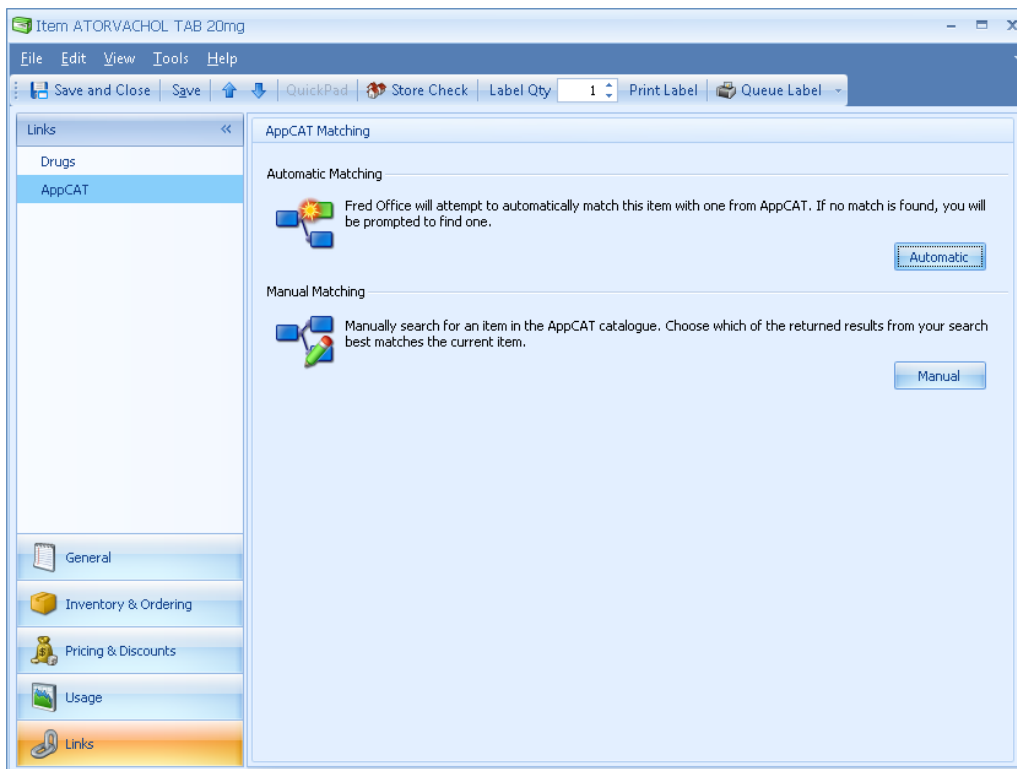
- Right-click the drug you want to match to a Fred Office item.
- Click **Create Item**.



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

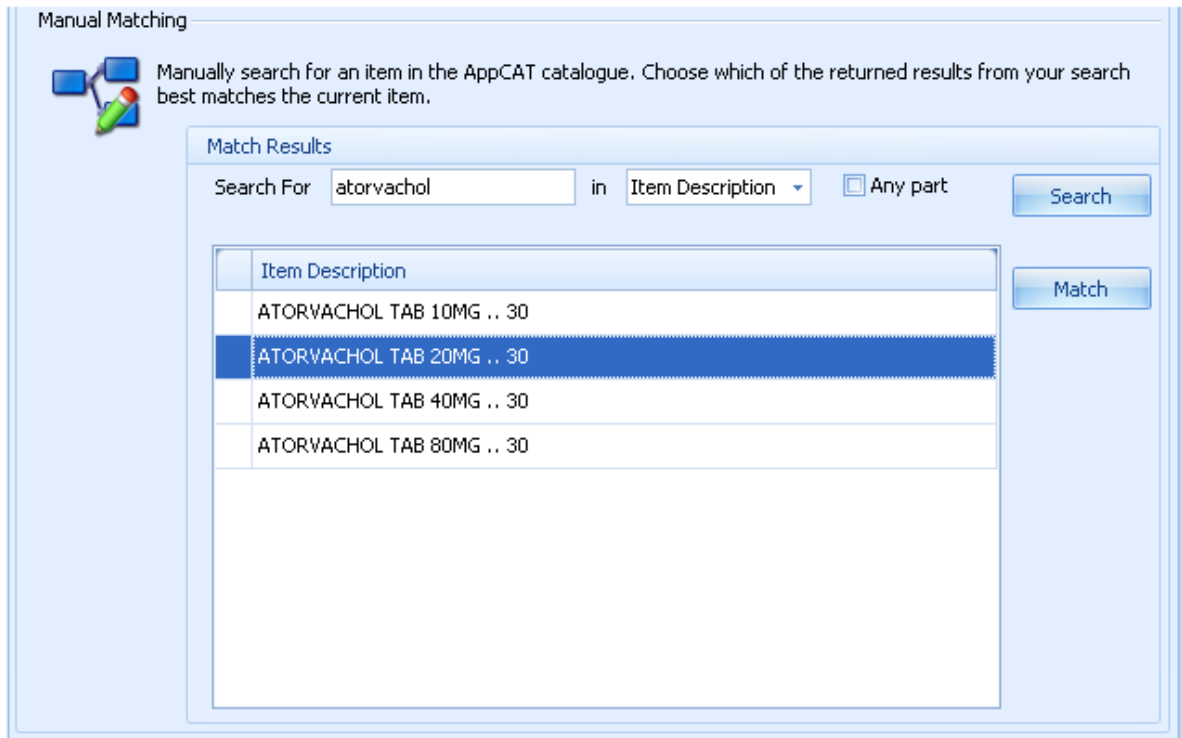


3. In the left-hand navigation menu, click **Links**.
4. In the **Links** menu, click **AppCAT**.



5. In the **AppCAT Matching** panel, click **Manual**.

The **Manual Matching** panel is displayed.



6. In the **Search For** text box, enter all or part of the drug's description.

Note: 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.

Note: 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**.

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)

Change	Local Value	AppCAT Value
Item - Description Change	ATORVACHOL TAB 20mg	ATORVACHOL TAB 20MG .. 30
Item - Tax Change	No GST	GST
Item - New Manufacturer	No Manufacturer	CENTRAL HOSPITAL SUPPLIES
Supplier Item - New		83036 ASCENT PHARMACEUTICALS (GENEP...
Supplier Item - New		83036 CENTRAL HOSPITAL SUPPLIES (Vic)
Alias - New		933666005334
Alias - New		933666005334

1. Click to highlight a change you want to apply.
2. Click **Apply**.

Note: To select multiple changes to be applied at the same time, hold down [Ctrl] while you click the changes.

Change	Local Value	AppCAT Value
Item - Description Change	ATORVACHOL TAB 20mg	ATORVACHOL TAB 20MG .. 30
Item - Tax Change	No GST	GST
Item - New Manufacturer	No Manufacturer	CENTRAL HOSPITAL SUPPLIES
Supplier Item - New		83036 ASCENT PHARMACEUTICALS (GENEP...
Supplier Item - New		83036 CENTRAL HOSPITAL SUPPLIES (Vic)
Alias - New		933666005334
Alias - New		933666005334

The prompt **Apply changes selected?** is displayed.

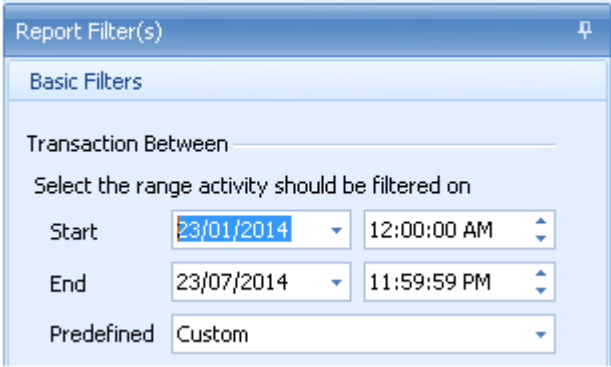
3. Click **Yes**.
4. Once all changes are completed, click **Save and Close**.

Note: 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.

Note: We recommend always using the date you had Fred Office installed as the **Start** date.



Report Filter(s)

Basic Filters

Transaction Between

Select the range activity should be filtered on

Start 23/01/2014 12:00:00 AM

End 23/07/2014 11:59:59 PM

Predefined Custom

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.

Note: 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.

Note: 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.

The screenshot shows two windows from the Fred Office software. On the left is the 'Inventory' window, which has a table with the following data:

Inventory	
SOH	2.00
Committed	0.00
Available	2.00
Qty on Order	0.00
Item Type	Standard

On the right is the 'Manual Adjustment' dialog box. It contains the following fields:

- Quantity:** 1.00
- Reason:** Unmatched Drug SOH Correction
- Remarks:** (An empty text area)
- Buttons:** OK and Cancel

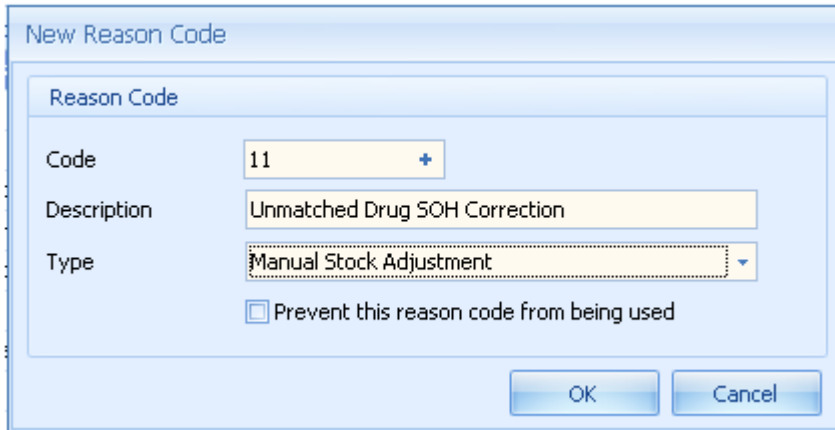
7. Enter the new **SOH** value.
8. If required, select an **adjustment reason**.

Note: 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**.
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**.



The screenshot shows a 'New Reason Code' dialog box. The 'Reason Code' section contains the following fields:

- Code:** 11 (with a '+' button to the right)
- Description:** Unmatched Drug SOH Correction
- Type:** Manual Stock Adjustment (dropdown menu)

Below the 'Type' field is a checkbox labeled 'Prevent this reason code from being used', which is currently unchecked. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

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**.



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