

Pharmacy Manager v12.5 Release Guide

Summary of Changes

Pharmacy Manager release v12.5 introduces the following features:

All Countries

- **Stock Inventory screen** – We have introduced the **Stock Inventory** screen, a new feature that helps you keep track of stock levels within your pharmacy. See [Stock Inventory](#).
- **Patient Search Improvements** – You can now search for a patient by Date of Birth and by name within the **View History** screen. See [Patient Search Improvements](#).
- **Marking a patient as an App user** - You can now mark a patient as an App user. This will help you easily identify patients that use apps to manage their medication. See [Marking a patient as an App user](#).

England Only

- **Serious Shortage Protocol (SSP) Electronic Claiming** – In this release, we have implemented functionality in readiness for when users can claim SSP in electronic claims.



Note: This functionality **must not** be used until the Drug Tariff is updated to indicate so. Until this update is made, continue to claim for SSP using the guidance [available here](#). We will send a further update when this functionality is available.

Stock Inventory

Introduction

In this release, we are introducing the first of a series of changes, to how you manage stock inventory within Pharmacy Manager.

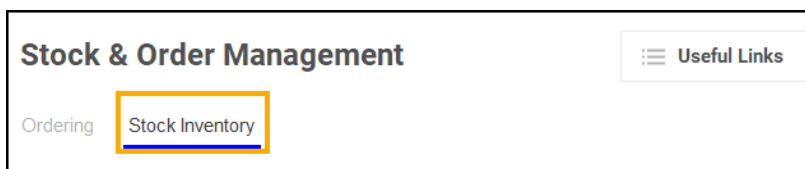
The changes include:

- The **Ordering** screen becomes the **Stock & Order Management** screen .
- The new **Stock & Order Management** screen provides access to the existing **Ordering** screen and the new **Stock Inventory** screen.

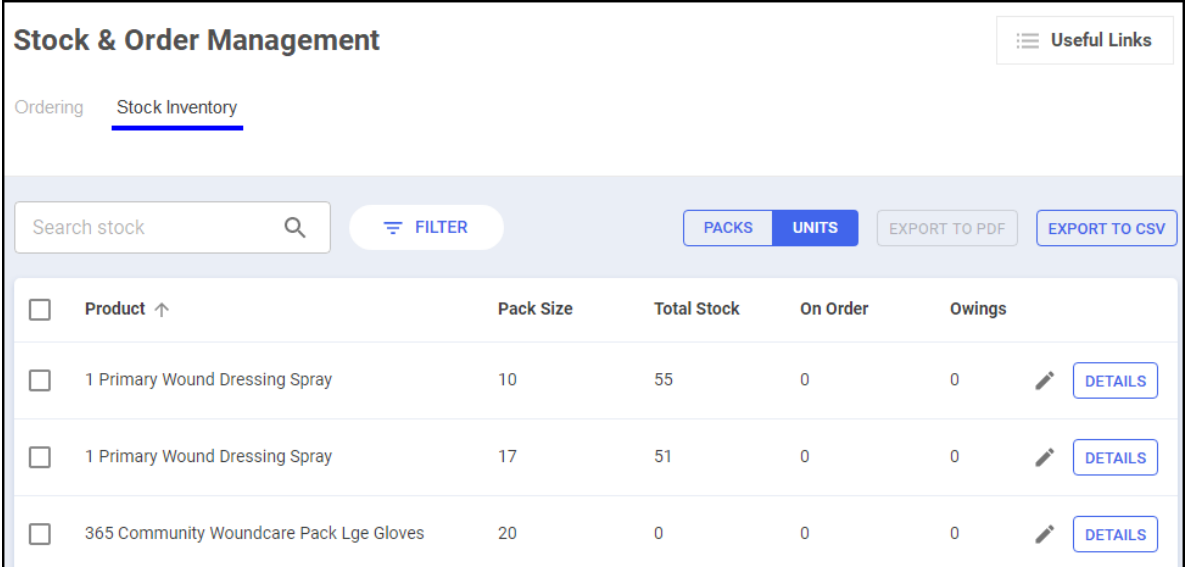
Accessing the Stock Inventory Screen

To access the **Stock Inventory** screen:




1. From the **Stock & Order Management**  screen, select **Stock Inventory**.



2. The **Stock Inventory** screen displays.



The screenshot shows the 'Stock Inventory' screen with a search bar, a filter button, and two export buttons. Below these are three rows of product data.

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	1 Primary Wound Dressing Spray	10	55	0	0	 DETAILS
<input type="checkbox"/>	1 Primary Wound Dressing Spray	17	51	0	0	 DETAILS
<input type="checkbox"/>	365 Community Woundcare Pack Lge Gloves	20	0	0	0	 DETAILS

What is the Stock Inventory screen?

The **Stock Inventory** screen contains all items on the Pharmacy Manager product file and displays additional information relating to the stock levels of each item within your pharmacy.

For each item on the Pharmacy Manager product file, the **Stock Inventory** screen displays:

- **Product** – The product name.
- **Pack Size** – The pack size of the product.
- **Total Stock** – Your current stock of the product. See [Updating Total Stock](#).
- **On Order** – The amount of the product you currently have on order.
- **Owings** – Your current number of owings for the product.
- **Details** – Access to the Drug Details screen. See [Drug Details](#).

Stock & Order Management

☰ Useful Links

Ordering Stock Inventory

FILTER

PACKS

UNITS

EXPORT TO PDF

EXPORT TO CSV


<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	1 Primary Wound Dressing Spray	10	55	0	0	✎ DETAILS
<input type="checkbox"/>	1 Primary Wound Dressing Spray	17	51	0	0	✎ DETAILS
<input type="checkbox"/>	365 Community Woundcare Pack Lge Gloves	20	0	0	0	✎ DETAILS
<input type="checkbox"/>	365 Community Woundcare Pack Med Gloves	20	0	0	0	✎ DETAILS
<input type="checkbox"/>	365 Community Woundcare Pack Sml Gloves	20	0	0	0	✎ DETAILS
<input type="checkbox"/>	365 Film Dressing 10cm x 12cm	50	0	0	0	✎ DETAILS
<input type="checkbox"/>	365 Film Dressing 10cm x 14cm	50	0	0	0	✎ DETAILS
<input type="checkbox"/>	365 Film Dressing 10cm x 25cm	30	0	0	0	✎ DETAILS
<input type="checkbox"/>	365 Film Dressing 15cm x 20cm	25	0	0	0	✎ DETAILS

Searching for Stock

The **Stock Inventory** screen displays all products on the Pharmacy Manager product file.

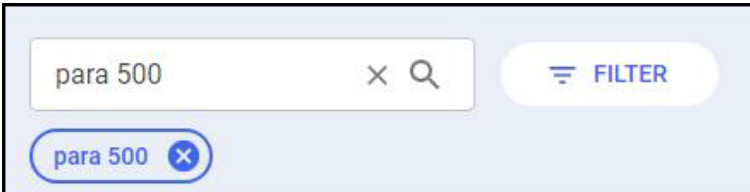
To find a specific product, use the **Search stock** function.

To search for a product:

- From **Search stock**, enter all or part of the product name and select **Search** . For example, if you are searching for Paracetamol 500mg tablets, enter:
 - **PARA** – Displays all items beginning with PARA.
 - **PARA 500** – Displays all items beginning with PARA with a strength of 500.
 - **PARA 500 TAB** – Displays all items beginning with PARA with a strength of 500 in tablet form.



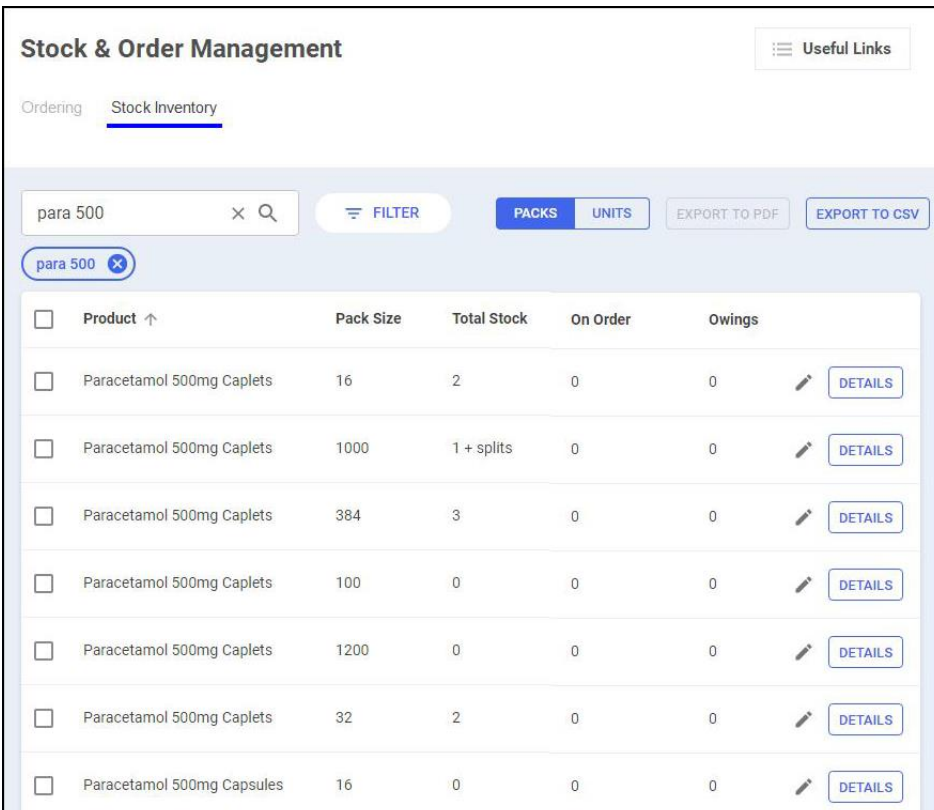
Note: The product's PIP code can also be used as search criteria.



para 500

para 500

- The **Stock Inventory** screen updates. All products that match your search criteria display.



Stock & Order Management Useful Links

Ordering Stock Inventory

para 500

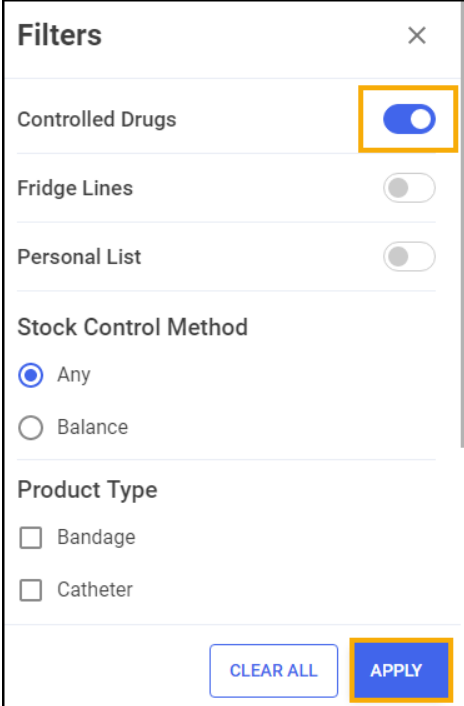
para 500

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	Paracetamol 500mg Caplets	16	2	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Paracetamol 500mg Caplets	1000	1 + splits	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Paracetamol 500mg Caplets	384	3	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Paracetamol 500mg Caplets	100	0	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Paracetamol 500mg Caplets	1200	0	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Paracetamol 500mg Caplets	32	2	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Paracetamol 500mg Capsules	16	0	0	0	<input type="button" value="DETAILS"/>

Filtering stock on display

You can control what products display on the **Stock Inventory** screen by applying a range of filter(s). To apply a filter(s):

1. Select **Filter** .
2. The **Filters** screen displays.



Filters ×

Controlled Drugs

Fridge Lines

Personal List

Stock Control Method

Any

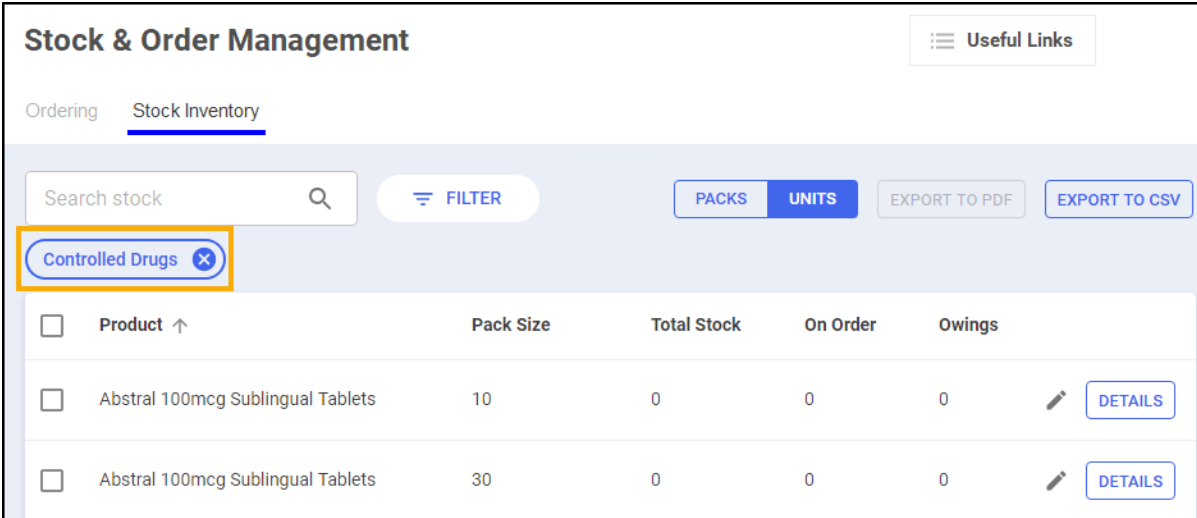
Balance

Product Type

Bandage

Catheter

3. Select a filter, for example, **Controlled Drugs**, and select **Apply**.
4. The **Stock Inventory** screen updates and displays stock that matches the applied filter(s).



Stock & Order Management ☰ Useful Links

Ordering Stock Inventory

Search stock

Controlled Drugs ×

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	Abstral 100mcg Sublingual Tablets	10	0	0	0	<input type="button" value="DETAILS"/>
<input type="checkbox"/>	Abstral 100mcg Sublingual Tablets	30	0	0	0	<input type="button" value="DETAILS"/>



Note: The applied filter displays under the **Search stock** bar. Select 'x' to remove the filter.

Viewing Total Stock in Packs/ Units

To choose to view your **Total Stock** in **Packs** or **Units**:

1. Select **Packs** or **Units**  as required.
2. **Stock Inventory – Total Stock** updates according to your selection.

Stock & Order Management ☰ Useful Links

Ordering Stock Inventory

Search stock PACKS **UNITS**


<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	1 Primary Wound Dressing Spray	10	55	0	0	<input type="button" value="DETAILS"/>




Note: The **Stock Inventory** screen remembers your selection and applies it by default on your next visit.

Updating Total Stock

To update **Total Stock**:

1. From the **Stock Inventory** screen, find the product you wish to update.
2. Select **Edit** .

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	Aspirin 75mg Disp Tablets	100	0	0	0	 <input type="button" value="DETAILS"/>

3. From **Total Stock**, enter the correct stock number and select **Save**  or press **Enter** on your keyboard.

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	Aspirin 75mg Disp Tablets	100	10 packs	<input type="button" value="SAVE"/>	0	0 <input type="button" value="DETAILS"/>



Note: The **Stock Inventory** screen does not currently support **Qualified Stock Adjustments**. This feature will be implemented in a future release.


4. **Total Stock** updates.

Drug Details screen

The Drug Details screen contains additional information for each individual item on the Pharmacy Manage product file.

To access the **Drug Details** screen:

1. From the **Stock Inventory** screen, find the product and select **Details** DETAILS.

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input type="checkbox"/>	Aspirin 75mg Disp Tablets	100	10	0	0	 DETAILS

2. The **Drug Details** screen displays:
 - **Last Dispensed** – The date that medication item was last dispensed.
 - **In Stock** – The current volume of the medication item you have in stock. This displays in **Packs** or **Units**, depending on the selection you have made on the **Stock Inventory** screen.
 - **Max Dispensed** – The maximum amount of the medication item that you have ever dispensed in a day. Select the drop-down arrow to view the maximum amount you have ever dispensed in a week or month.
 - **View Other Pack Sizes** – Select **View Other Pack Sizes** to view the **Drug Details – Other Pack Sizes** screen.
 - **View More** – Select to view the **Product Details** screen for the medication item.
 - **Information** – Displays the **Tariff Price** and **List Price** for the medication item.

Drug Details
✕

LAST DISPENSED: 17/03/2021

Aspirin
75mg Dispersible Tablets, 100

In Stock (100 pack)

10 packs £3.20

Max Dispensed PER DAY ▾

100

Information

Tariff Price	List Price
£3.82	£0.32

VIEW OTHER PACK SIZES

VIEW MORE

Drug Details – Other Pack Sizes

The **Drug Details – Other Pack Sizes** screen contains information relating to the stock levels of the selected medication item in other packs within the Pharmacy. The screen displays:

- **In Stock (All Pack Sizes)** – Displays the current volume of the medication item you have in stock, across all pack sizes within the pharmacy.
- **Stock Information** – Displays a breakdown of where all stock of the medication item is located within the pharmacy.

Drug Details - Other Pack Sizes

×

Aspirin
75mg Dispersible Tablets

In Stock (All Pack Sizes)

1772 units £3.36

Stock Information

Product	Pack Size	In Stock (Units)
Aspirin 75mg Disp Tablets	28	50
Aspirin 75mg Disp Tablets	336	672
Aspirin 75mg Disp Tablets	1000	0

BACK

- If the medication item has no other pack sizes available within Pharmacy Manager, the below screen displays:


Drug Details - Other Pack Sizes

×

Aspirin
75mg Tablets

In Stock (All Pack Sizes)

322 units



This drug has no other pack sizes.


BACK

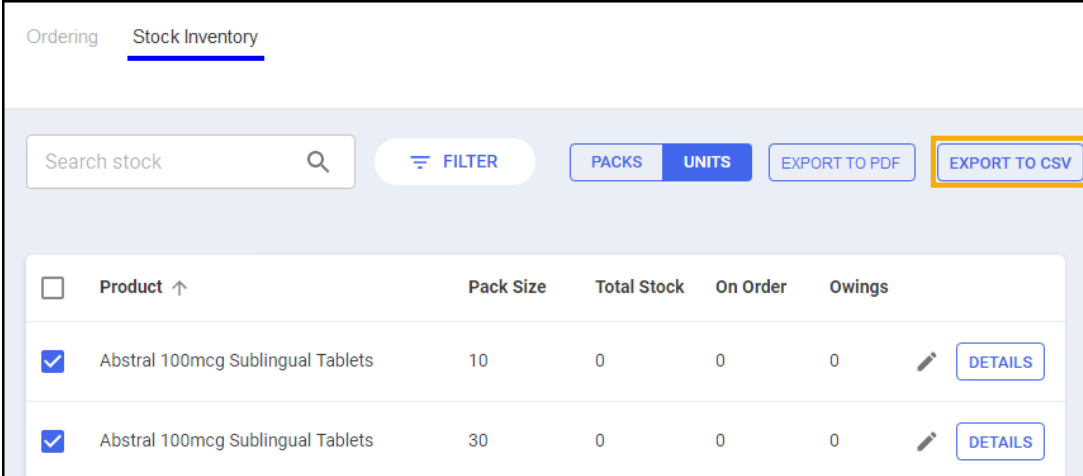


Note: The information on the **Drug Details** screen displays in **Packs** or **Units**, depending on your selection on the Stock Inventory screen.



CSV Stock Inventory Report

To create a CSV **Stock Inventory** report:

1. Select the required **Product(s)**.
2. Select **Export to CSV** .



The screenshot shows the 'Stock Inventory' page in Pharmacy Manager. At the top, there are tabs for 'Ordering' and 'Stock Inventory'. Below the tabs is a search bar labeled 'Search stock' and a 'FILTER' button. To the right of the search bar are three buttons: 'PACKS', 'UNITS', and 'EXPORT TO PDF'. The 'EXPORT TO CSV' button is highlighted with a red box. Below the buttons is a table with the following columns: 'Product', 'Pack Size', 'Total Stock', 'On Order', and 'Owings'. The table contains two rows of data for 'Abstral 100mcg Sublingual Tablets' with pack sizes of 10 and 30. Each row has a 'DETAILS' button and a pencil icon.

<input type="checkbox"/>	Product ↑	Pack Size	Total Stock	On Order	Owings	
<input checked="" type="checkbox"/>	Abstral 100mcg Sublingual Tablets	10	0	0	0	 DETAILS
<input checked="" type="checkbox"/>	Abstral 100mcg Sublingual Tablets	30	0	0	0	 DETAILS


3. Save the CSV file to a specific location on your device.



Note: If you do not select a Product, you will generate a CSV **Stock Inventory** report of your entire Product file in Pharmacy Manager.

Useful Links

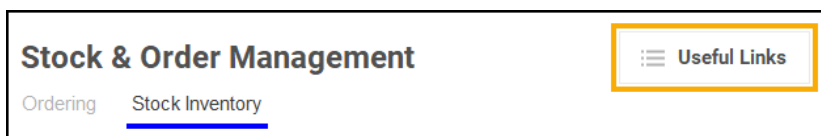
Introduction

We have added a **Useful Links** feature to the **Stock & Order Management**  screen. You can use this feature to quickly access websites you regularly use when managing stock for your pharmacy, for example, wholesaler websites.

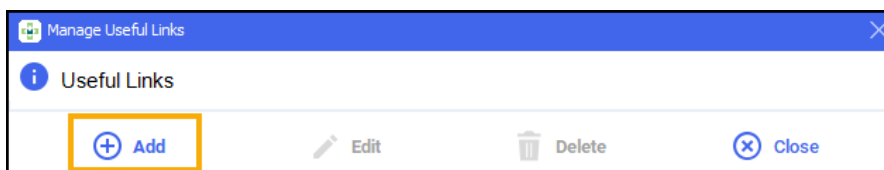
Adding a Useful Link

To add a useful link:

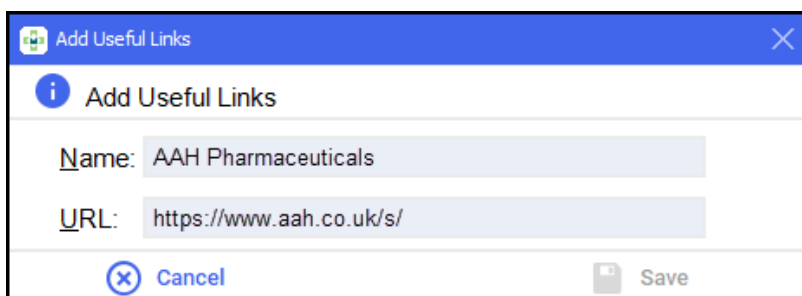
1. Select **Useful Links** 



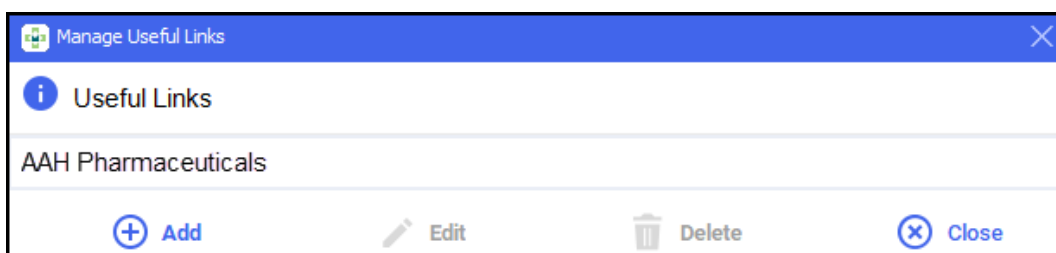
2. The **Manage Useful Links** screen displays.
3. Select **Add** 



4. The **Add Useful Links** screen displays. Complete as outlined below:
 - **Name** – Enter the website name.
 - **URL** – Enter the website URL.
5. Select **Save**.



6. The Useful Link is added to the **Manage Useful Links** screen.




Patient Search Improvements

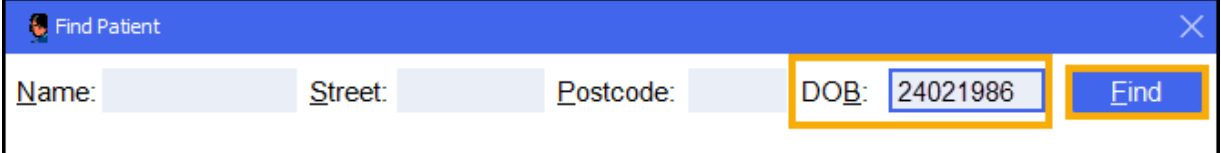
We have made improvements to the patient search functionality within Pharmacy Manager. You can now:

- Search for a patient by Date of Birth.
- Search for a patient by name within the **View History** screen.

Searching for a patient by Date of Birth


To search for a patient by **Date of Birth**, from the **Find Patient** screen:

1. From **DOB**, enter the patient's date of birth, in any of the below formats:
 - ddmmyy
 - ddmmyyyy
 - dd.mm.yy
 - dd.mm.yyyy
 - dd/mm/yy
 - dd/mm/yyyy
 - dd-mm-yy
 - dd-mm-yyyy
2. Select **Find** .



The screenshot shows the 'Find Patient' dialog box. The 'DOB' field is highlighted with a yellow box and contains the value '24021986'. The 'Find' button is also highlighted with a yellow box.

3. All patients with a matching date of birth display:



The screenshot shows the 'Find Patient' dialog box displaying search results. The 'DOB' field is set to '24021986'. Below the search fields is a table of results:

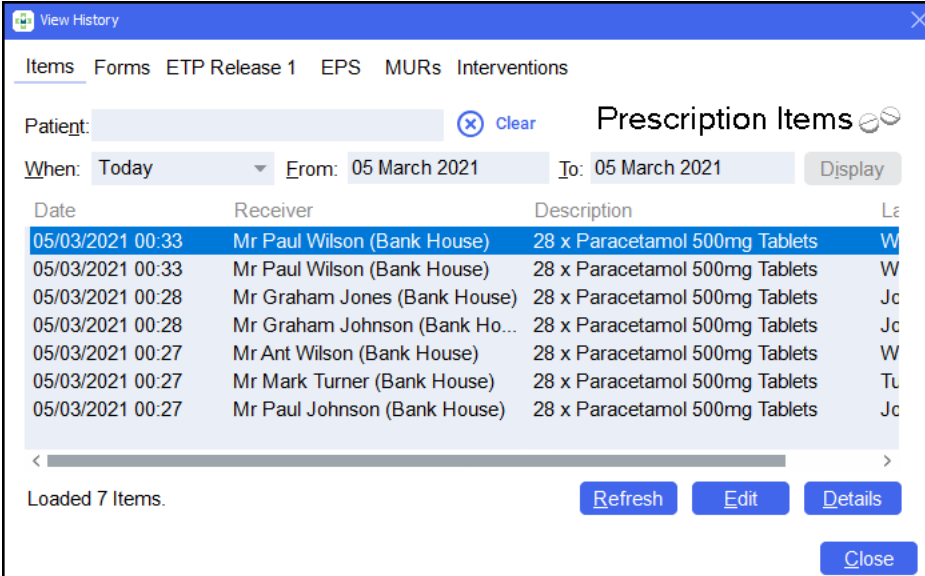
Last Name	First Name	Sex	Age	#	Address	Date of Birth
1 Jackson	Jason	Male	35	10	Bank House	24/02/1986
2 Johnson	Graham	Male	35	6	Abbey Road	24/02/1986
3 Turner	Dave	Male	35	5	Bank House	24/02/1986
4 Turner	Mark	Male	35	12	Fahd Road	24/02/1986

At the bottom of the dialog box, there are two checkboxes: Extend search to similar sounding names and Show temporary patients. There are also four buttons: Add, Details, OK, and Cancel.

Searching for a patient within the View History screen

To search for a patient by name within the **View History** screen:

1. Select **Quick Actions – History**.
2. The **View History** screen displays on the **Items** tab, showing all medication items dispensed today by default.



View History

Items Forms ETP Release 1 EPS MURs Interventions

Patient: Clear Prescription Items

When: Today From: 05 March 2021 To: 05 March 2021 Display

Date	Receiver	Description	La
05/03/2021 00:33	Mr Paul Wilson (Bank House)	28 x Paracetamol 500mg Tablets	W
05/03/2021 00:33	Mr Paul Wilson (Bank House)	28 x Paracetamol 500mg Tablets	W
05/03/2021 00:28	Mr Graham Jones (Bank House)	28 x Paracetamol 500mg Tablets	Jc
05/03/2021 00:28	Mr Graham Johnson (Bank Ho...	28 x Paracetamol 500mg Tablets	Jc
05/03/2021 00:27	Mr Ant Wilson (Bank House)	28 x Paracetamol 500mg Tablets	W
05/03/2021 00:27	Mr Mark Turner (Bank House)	28 x Paracetamol 500mg Tablets	Tu
05/03/2021 00:27	Mr Paul Johnson (Bank House)	28 x Paracetamol 500mg Tablets	Jc

Loaded 7 Items. Refresh Edit Details Close

3. From **Patient**, enter all or part of the patient's name.
4. All matching patients display.



View History

Items Forms ETP Release 1 EPS MURs Interventions

Patient: Paul Wilson Clear Prescription Items

When: Today From: 05 March 2021 To: 05 March 2021 Display

Date	Receiver	Description	La
05/03/2021 00:33	Mr Paul Wilson (Bank House)	28 x Paracetamol 500mg Tablets	W
05/03/2021 00:33	Mr Paul Wilson (Bank House)	28 x Paracetamol 500mg Tablets	W

Loaded 2 Items. Refresh Edit Details Close

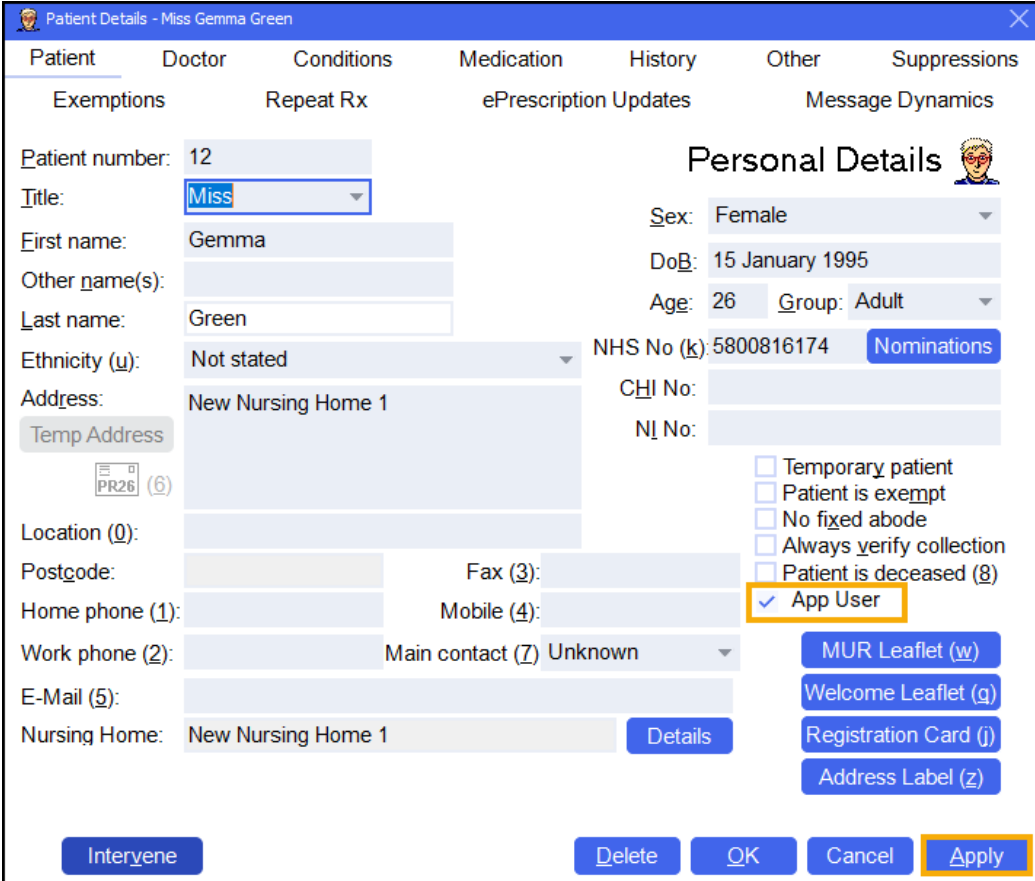


Note: You can also search for a patient by name within the **Items**, **Forms**, **MURs** and **Interventions** tabs.

Marking a patient as an App user

To mark a patient as an App user:

- From the **Patient Details** screen select the **App User** **App User** checkbox.



Patient Details - Miss Gemma Green

Patient: 12
 Title: Miss
 First name: Gemma
 Other name(s):
 Last name: Green
 Ethnicity (u): Not stated
 Address: New Nursing Home 1
 Temp Address: PR26 (5)
 Location (0):
 Postcode:
 Home phone (1):
 Work phone (2):
 E-Mail (5):
 Nursing Home: New Nursing Home 1

Personal Details
 Sex: Female
 DoB: 15 January 1995
 Age: 26 Group: Adult
 NHS No (k): 5800816174
 CHI No:
 NI No:

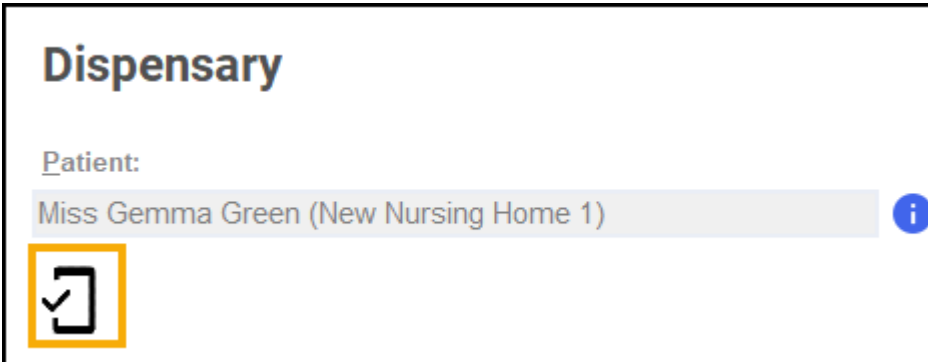
Temporary patient
 Patient is exempt
 No fixed abode
 Always verify collection
 Patient is deceased (8)
 App User

MUR Leaflet (w)
 Welcome Leaflet (q)
 Registration Card (j)
 Address Label (z)

Intervene Delete OK Cancel **Apply**

- Select **Apply** **Apply**.

- In future, when dispensing to the patient, the **App user** icon displays under the **Patient** name.



Dispensary

Patient:
Miss Gemma Green (New Nursing Home 1) i