



# LOTS

## software release notes (version 3.7)

This document describes the changes in the LOTS 3.7 release. Please read this document carefully and keep it in a safe place as you may wish to refer to it later

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## Multi-Select Own Repeats – Add to Script Queue

We have introduced a new feature where you can multi-select own repeats from the patients repeats list and add them to the script Queue.

Simply select the Own Repeat items and right mouse click, an option to 'Add to Script Queue' will become available.

	Script	Date	Drug & Instructions	ePrescription Check-Off	
1	12257	15/05/23	30 SOMAC 20MG TAB 1 d	Add to Script Queue	DARLENE CRAWFORD
2	12246	09/05/23	30 APO-SIMVASTATIN 40MG TAB Take ONE tablet daily		DARLENE CRAWFORD
3	12232	08/05/23	100 BETALOC 50MG TAB 1 Daily		ADONIS LANVER

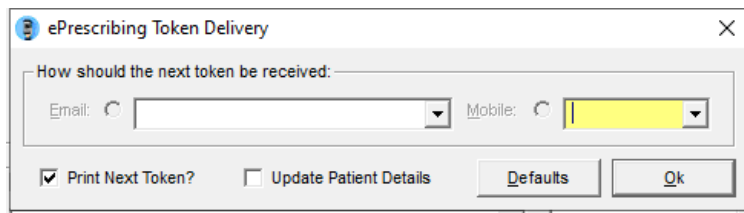
## Script Queue – Printing options no longer global

The printing options for the Script Queue are no longer global. The printing settings can now be set differently on each computer.

## Token Delivery Prompt

### Closing the prompt without sending or printing token

The Token Delivery prompt now has a form close button which provides the user with the ability to close the prompt without sending the token or printing the token.



### Email and Mobile numbers provided from the saved data

The email and mobile fields now have a drop-down menu that will display the saved email or mobile data that is saved in the patient history. This allows the user to select the saved details from the patient history rather than applying the values that are sent in the payload. By default, the details that are sent in the payload will populate the token delivery prompt.

### Patient Mobile Number

The Patient Information Screen now has a field to capture a patient's mobile number. This field can be populated by the token mobile number when issuing a token for an electronic prescription. To update this field using the token mobile, ensure the mobile number is populated and selected, then select the 'Update Patient Details' option when sending the token.

### Patient Email Address

The Patient Information Screen now has a field to capture a patient's email. This field can be populated by the token email when issuing a token for an electronic prescription. To update this field using the token email, ensure the email address is populated and selected, then select the 'Update Patient Details' option when sending the token.

## Evidence of Prescription – Printing A5

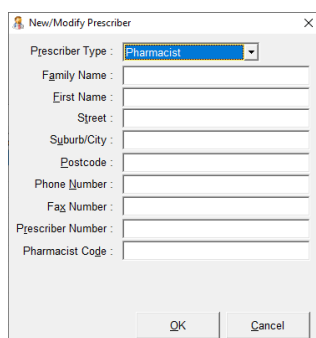
The Evidence of Prescription can be set to print on an A5 printer. When printing A5 the EOP will print landscape. To set an A5 printer navigate to Printer Setup module> Select Evidence of Prescription and set the nominated A5 printer.

## Pharmacist Prescriber – Dispensing Scheduled Medications

To accommodate the initiative for the treatment of urinary tract infections by Pharmacists, LOTS can now display scheduled drugs in the Drug Lookup, when using a Pharmacist as a Prescriber.

To create a Pharmacist as a Prescriber simply create the Pharmacist using the Modify Prescribers module.

Select the drop-down menu to reflect Pharmacist – You may need to populate the Prescriber Number field with 0000000 to save your details.

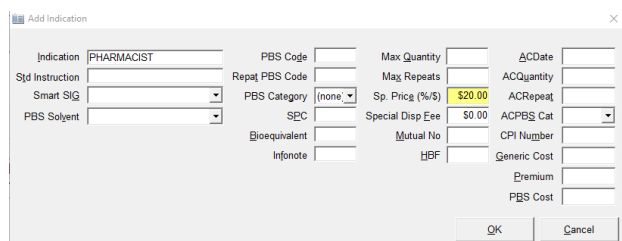


A requirement for the scheduled drug to appear in the drug lookup is to have an indication in stock cards, called "Pharmacist"

Navigate to the Stock Cards module > Select the Drug Information Tab > Right Mouse Click on the existing Indication and select Add Indication.

In the Indication field, be sure to call the Indication "Pharmacist" – Select PBS category (none) This will ensure that the item is dispensed as a private item.

If you would like to add a special price, populate the Sp. Price (%/\$) field with a dollar value – Select Ok



Access the dispense module and select the Pharmacist as the Prescriber when dispensing your item – you should now see the new indication for selection when searching for the drug.



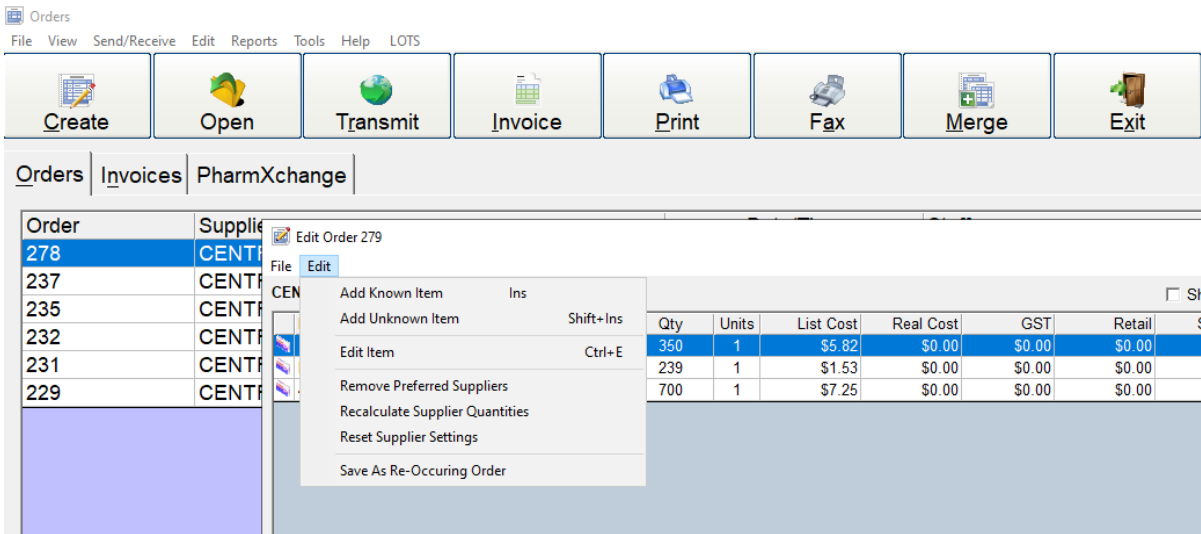
Please ensure that you familiarise yourself and abide with your state legislation regarding this initiative.

## Reoccurring Order Template

Users can now create and save order templates for reoccurring orders. This feature allows the user to create an order and save this order for future ordering. The order can be edited, with items added or removed if ever required.

### How to create a reoccurring order

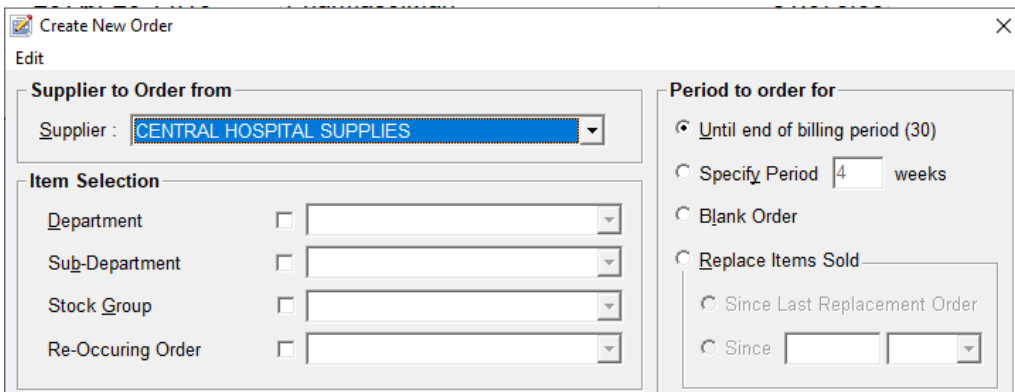
Creating a reoccurring order template is as easy as, creating your order with the required items, select Edit and the 'Save as Re-Occurring Order' option. You will receive a prompt to name your re-occurring order template, this will then save the order as a template for future re-ordering.



### How to generate a re-occurring order

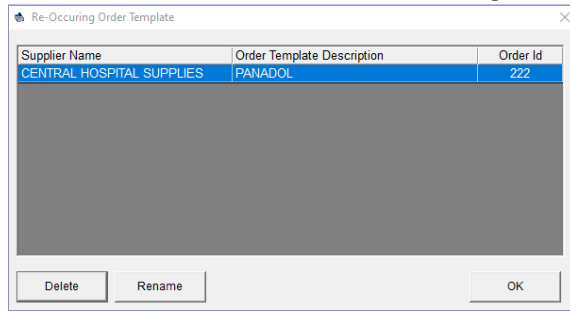
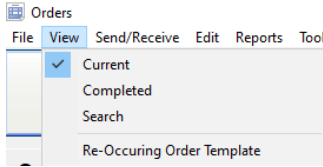
A new option will now be available when creating an order so that the re-occurring order template can be selected.

Please Note: When selecting the re-occurring order template all other order options become redundant and will not apply. The order template will open displaying the same items that it contained when it was saved.



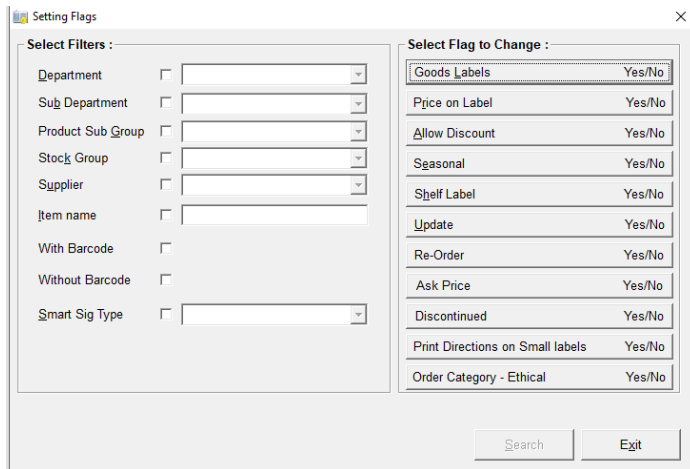
## How to manage my re-occurring order templates

Reoccurring order templates can be renamed and deleted. Select the View Menu > Re-occurring order template option.



## Stock Card Options – Order Category

The Stock Card Options module has a new flag so that the Order Category within the Stock Card can easily be changed to either OTC or Ethical, in bulk.



## Automatic Debtor Rollover function

A new feature to automatically rollover debtor accounts has been introduced in 3.7.

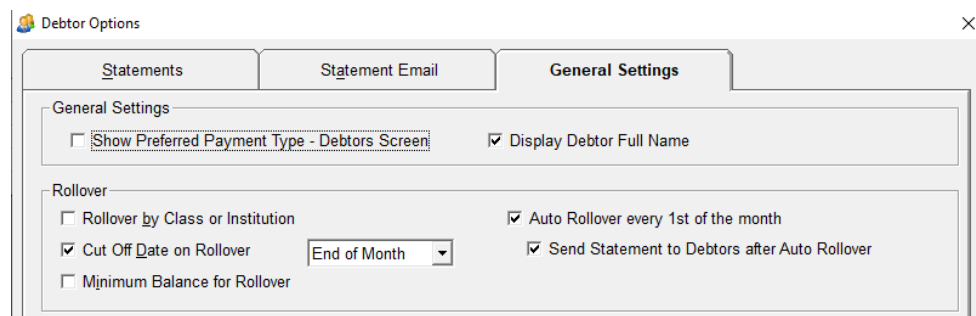
Please Note: This feature is not available when rollover by Class or Institution is set.

To activate this feature, navigate to the Debtors module and select > Tools>Options> General Settings.

‘Auto Rollover every 1<sup>st</sup> of the month’ option – Select this option. When selected the debtor accounts will perform an automatic rollover on the 1<sup>st</sup> of the month when LOTS Menu is opened.

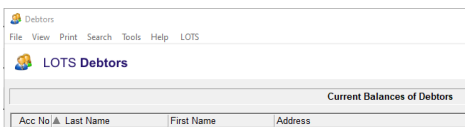
## Automatic Emailing of Debtor Statements

‘Send Statements to Debtors after Auto Rollover’ – This option will be available for sites that are using the Corum Emler. When selected the automatic rollover will automatically send the statements to the Corum Emler for sending.



## Debtors – Display as Last Name and First Name

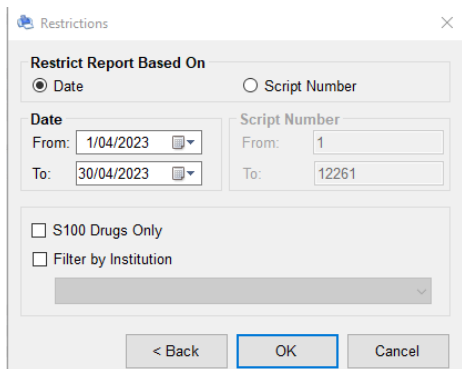
The list of Debtors now displays separate Last and First name columns. Both columns can be filtered to display alphabetically to assist with locating certain debtors.



The screenshot shows a window titled 'Debtors' with a menu bar (File, View, Print, Search, Tools, Help, LOTS) and a toolbar. Below the toolbar is a header 'LOTS Debtors' and a sub-header 'Current Balances of Debtors'. A table is displayed with the following columns: 'Acc No', 'Last Name', 'First Name', and 'Address'.

## Users of Specific Drug Report – New Institution filter

A new filter called 'Filter by Institution' is now available when running the Users of Specific Drug Report.



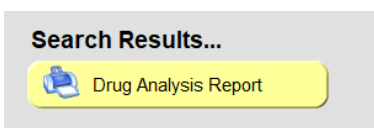
The screenshot shows a 'Restrictions' dialog box. It has a title bar with a close button. The main area is titled 'Restrict Report Based On' and contains two radio buttons: 'Date' (selected) and 'Script Number'. Below these are two sections: 'Date' with 'From' (1/04/2023) and 'To' (30/04/2023) fields, and 'Script Number' with 'From' (1) and 'To' (12261) fields. There are two checkboxes: 'S100 Drugs Only' and 'Filter by Institution'. Below the 'Filter by Institution' checkbox is a dropdown menu. At the bottom are three buttons: '< Back', 'OK', and 'Cancel'.

## Item Sales Report – New institution filter

A new filter called 'Institution' has been added to the Item Sales Report. This filter will produce results associated to the defined Institution.

## Brand Analysis Report – Renamed to Drug Analysis Report

The Brand Analysis Report has been renamed to Drug Analysis Report – The intention for this report is to expand over coming releases to provide more drug related analysis filters, to support a more simplified report like the Dispense Statistics.



## Drug Analysis Report – Stock Group Filter

We have made a change to our existing Drug Analysis Report, it now has a filter to report on Stock Groups. Selecting this filter will return a report itemising all the items that are contained in the associated Stock Group. This differs as historically the report listed results grouped by manufacturer. Listing items will be particularly useful when generating an analysis report in your dispensary for the upcoming 60 Day Dispense changes.

### Drug Analysis Report - 1/01/2023 to 23/05/2023 (206 Scripts)

SUREFIRE-PHARMASOL  
120 SUSSEX STREET  
SYDNEY NSW 2000

Stock Group : 60 Day Stock Group , All Scripts

Stock Item	# of Scripts	% of Total	List Cost	Government Recovery	Patient Value	Total Value	GP\$	GP%
LIPITOR 10MG TAB	10	4.9	15.30	41.50	80.30	121.80	106.50	87.44
LIPITOR 80MG TAB	4	1.9	48.08	0.00	84.60	84.60	36.52	43.17
<b>Totals</b>	<b>14</b>	<b>6.8</b>	<b>63.38</b>	<b>41.50</b>	<b>164.90</b>	<b>206.40</b>	<b>143.02</b>	<b>69.29</b>

- **# of Scripts** = Total number of scripts dispensed for that item for the date range specified
- **% of Total** = The percentage of your total script volume that these items contribute to, for the date range specified
- **List Cost** = This is the Stock Card List price for that item
- **Government Recovery** = This is the estimated Government Recovery for that dispensed item
- **Patient Value** = This is the Patient Contribution paid by the consumer
- **Total Value** = This is a combined total for the Government Recovery + Patient Contribution
- **GP\$** = This is the Gross Profit Value calculated for that item
- **GP%** = This value is the sum of Gross Profit Value / Total Sales Value \* 100

## Patient History Report

### Remaining Repeats Filter

The Patient History Report has a new filter called 'Only display items with remaining repeats' When selected the report will only show items that have a remaining repeat.

### Pharmacy ABN and Phone Number

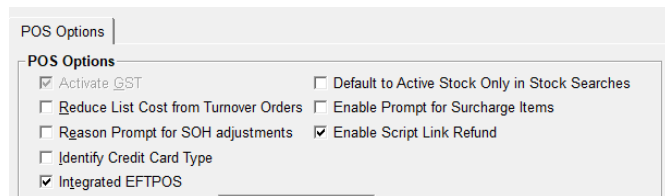
The Pharmacy ABN and Phone Number is now printed on the top of the Patient History Report.



## POS – Automated Surcharge for Integrated EFTPOS

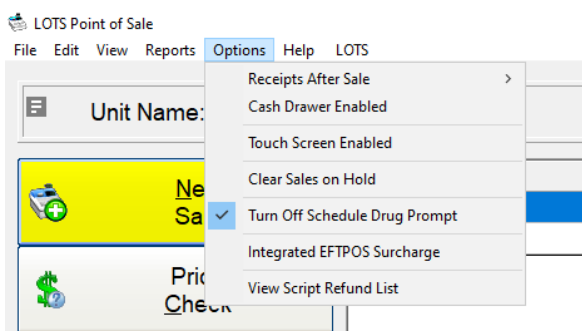
POS can now apply a surcharge automatically to the sales transaction.

For this feature to become available the LOTS POS Option> Integrated EFTPOS must be enabled.

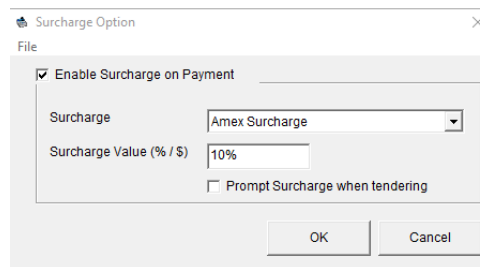


When Integrated EFTPOS is enabled in Options, a new menu item will become available in POS called "Integrated EFTPOS Surcharge. Please Note: This setting is global and will apply to all POS systems.

Selecting this will produce a window where the surcharge can be created.



Simply select the File Menu> Create New surcharge.

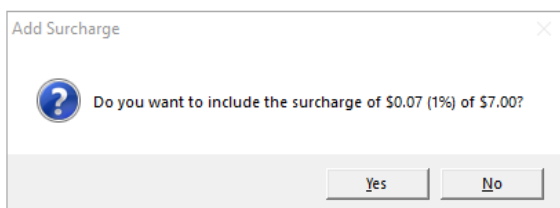


A surcharge can be created as a percentage or as a dollar value.

Multiple surcharges can be created but please note, for now only one surcharge can be active and the surcharge that is displayed when this form opens, will be the active surcharge applying to the EFT/CC tender in POS.

The surcharge will automatically apply to the sale transaction when tendering EFT/CC – A prompt will be produced so that the surcharge can be bypassed, if required.

If you prefer the surcharge to automatically apply without producing a prompt at POS, and without having the option to not apply the surcharge, please deselect the "Prompt Surcharge when tendering" checkbox.



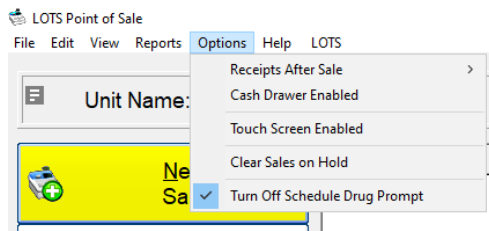
To assist with managing multiple surcharges and for reporting purposes, a stock item in stock cards will be created for each surcharge. This also provides the user with the ability to manage their surcharge items.

Please Note: By default, a surcharge item will be created exclusive of GST.

## POS – Selling a scheduled drug prompt

LOTS 3.3 introduced a prompt when a box barcode for a schedule item was scanned at the POS. We now have an option to turn this prompt off.

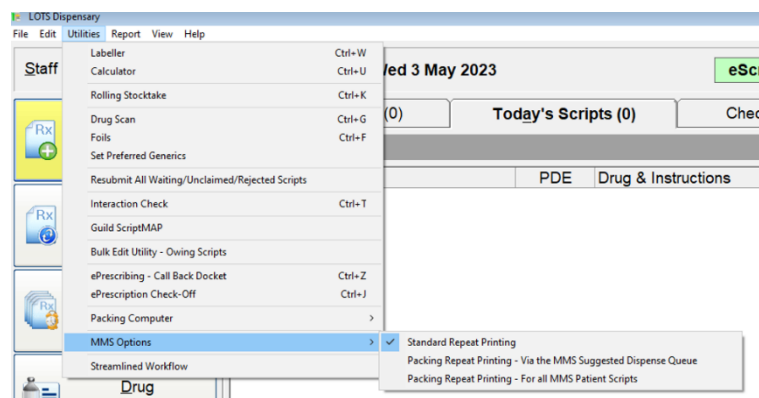
From POS, navigate to: Options> Turn off scheduled drug prompt



## LOTS DAA & Packing Patient Enhancements

### MMS Custom Repeat Printing

A new menu option called MMS Options is now available from the Dispense module so that Users can define their own repeat printing workflow when dispensing from the Suggested Dispense function.



### Standard Repeat Printing

A Repeat form displaying 5/0 will be printed when the initial item is dispensed in LOTS, as a deferred item.

This deferred item is the dispense that sends the script data through to the MMS database.

First Supply dispensed through the Suggested Dispense Tab - A Repeat form displaying 5/1 will be printed when the first supply is dispensed from the Suggested Dispense Queue.

This means there will not be a repeat printed when the final supply is dispensed.

### Packing Repeat Printing – Via the MMS Suggested Dispense Queue:

**Packing Repeat Printing:** A Repeat form displaying 5/0 will be printed when the initial item is dispensed in LOTS, as a deferred item.

This deferred item is the dispense that sends the script data through to the MMS database.

When the first supply is dispensed through the Suggested Dispense Tab - A Repeat form displaying 5/0 will also be printed.

This allows for a 5/5 repeat form to be printed when the final supply is dispensed.

Please Note: If the first supply is dispensed locally outside of the suggested dispense queue, and not deferred, a repeat form will not print for this supply.

The script data will be sent through to the MMS database though, so that the second supply can flow through the Suggested Dispense workflow.

This second supply will produce a 5/1 repeat.

**Please Note: This printing behaviour does not apply to scripts dispensed outside of the Suggested Dispense Queue. Scripts dispensed outside of the Suggested Dispense Queue will comply with Standard Repeat printing behaviours.**

### Packing Repeat Printing – For all MMS Patient Scripts

This option provides the same packing printing behaviour as mentioned above, but it differs as it also applies to scripts dispensed outside of the Suggest Dispense Queue.

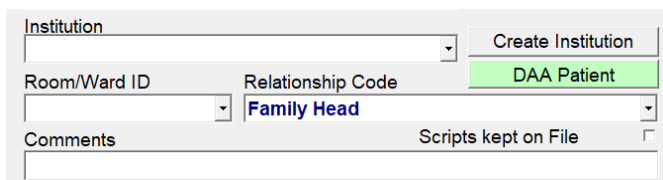
With this option selected all scripts dispensed in LOTS for patients marked as Send Scripts to MMS will have the Packing Repeat printing behaviour, applied.

### DAA Patient

A new DAA Patient button is available on the Patient Dispensary Information Tab so that a patient can be set as a Packing Patient.

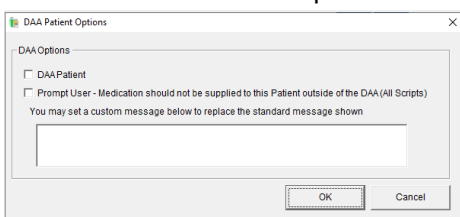
Selecting the button will produce the DAA Patient Options. A DAA Patient checkbox will be available and when selected, this will visually mark the patient as a Packing Patient when viewing the Patient information in LOTS.

A label displaying “Packing Patient” will also be displayed on the top of the screen along with the DAA patient button, displaying in green.



The screenshot shows a form with several fields: 'Institution' (dropdown), 'Room/Ward ID' (dropdown), 'Relationship Code' (dropdown with 'Family Head' selected), 'Comments' (text area), and 'Scripts kept on File' (checkbox). A green button labeled 'DAA Patient' is visible next to the Relationship Code dropdown. A 'Create Institution' button is also present.

A second option called “Prompt User” provides the ability to set a pre-defined or custom message that will appear at the start of each dispense for this patient. This message can be particularly helpful with alerting staff that medication should not be provided outside of their Webster pack.



The screenshot shows a dialog box titled 'DAA Patient Options'. It contains two checkboxes: 'DAA Patient' and 'Prompt User - Medication should not be supplied to this Patient outside of the DAA (All Scripts)'. Below the checkboxes is a text area for a custom message. The dialog has 'OK' and 'Cancel' buttons at the bottom.

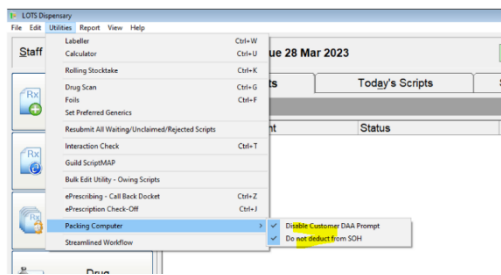
### Packing Computer Setting

A new menu option called Packing Computer is now available from the Dispense module so that Users can assign a particular computer as their Packing Computer.

This provides a setting to disable the DAA Prompt and stop it appearing on that particular computer.

When this option is set the prompt will still appear on other dispense terminals to alert other dispensing staff though.

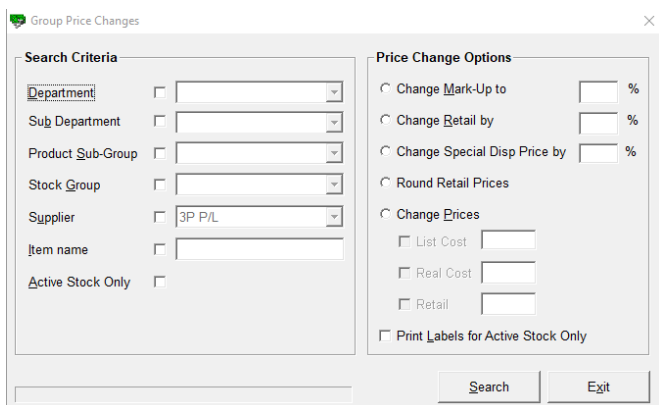
**Do not deduct from SOH option** - When this option is set, any dispense performed to any LOTS Patient on that computer will not affect/deduct from the items SOH.



## Group Price Changes

The Group Price Change utility allows you to make group price changes to your stock card and special dispense pricing.

By using the filters in the search criteria this allows you to refine the changes to a particular group of items.



### Change Mark-up to %

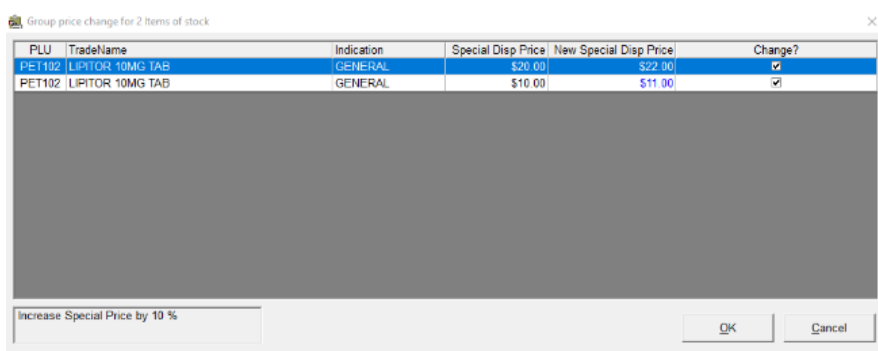
You can change your current markup by % for your selected items. The new mark-up will be displayed on the results screen in the New MK column and the New Retail value will also reflect this change. The mark-up is applied to the current List Cost.

### Change Retail by %

You can change your current retail by % for your selected items. The new retail will be displayed on the results screen in the New Retail column. If you are changing your retail values by %, the results screen allows for further editing by overtyping the New Retail Value. This way you can edit the new retail values to better align with your stores rounding logic.

### Change Special Dispense Price by %

An option is now available to change your Special Dispense Pricing by a % value. Like changing the retail by % option, you can further edit these values by overtyping the value that is displayed in the New Special Disp Price column which will be displayed on the results screen.



## Round Retail Prices – LOTS Options

The Round Retail Prices option will load your desired items and round the current Retail Price according to your rounding settings that are defined in LOTS Options. This could be, Rounding Up, Rounding Down or rounding to the nearest value that your system is set to.

**Please Note:** It is very important that you review the new values prior to proceeding with the change.

1. Any products that don't require the change can be un-ticked. Use the mouse or [**spacebar**] on your keyboard to tick or un-tick each line.
2. Any line that is un-ticked will not be changed and the original price and markup will be retained.

Any changes to retail prices will cause shelf labels to be added to the queue providing that Shelf label Stock Card Option is selected on the Stock Card.

## Change Prices

The change prices option allows you to make changes to your List, Real and Retail values. The user interface will display the suggested changes where they can be further edited and customised for each item.

To edit the New List, Real or Retail values, simply over type the values that are displayed in blue.

## Add/Edit Specials – Create a Promotion

You can now bulk load a promotion, using a stock group.

Add/Edit Specials > File > **Create Promotion**

Firstly, the create promotion form requires the promotion details including Promotion Name and Date Range the promotion should run for.

After selecting Ok, the items can be loaded into Add/Edit Specials via Department, Sub-Department, Stock Group or Supplier.

Further editing of the promotional prices can be done from the Add/Edit Specials grid after the items have loaded. If the promotion date range is current, the promotion can be activated by selecting the Activate Specials button. Alternatively, if the promotion has yet to start, the promotion will be activated when POS is opened on the promotion start date.

## Modeus DD Book Cloud

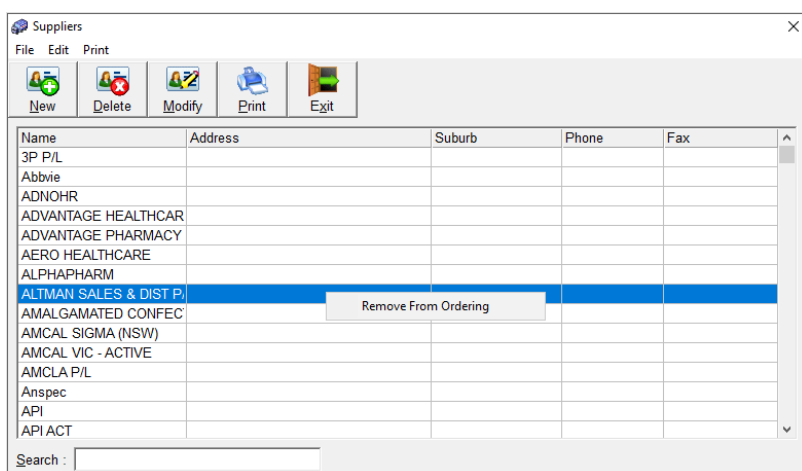
LOTS now supports DD Book Cloud when it comes to editing and deleting prescriptions from the dispense system. These functions will now automatically update in DD Book Cloud.

## PharmX – New Suppliers

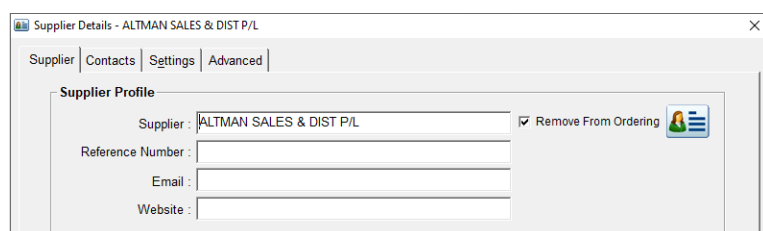
LOTS now lists all available PharmX Suppliers in the dropdown when you are creating an Order.

You may wish to navigate to Modify Suppliers Module to remove an unnecessary supplier by right clicking on the Supplier and selecting “Remove from Ordering”

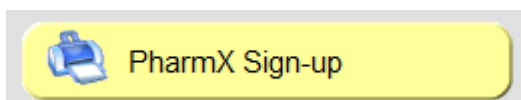
Selecting this will remove the supplier from the list of suppliers when creating an order.



If you need to return the supplier to the list of suppliers, open the supplier details and ensure that the Remove from Ordering checkbox has been deselected. This will return the supplier to the list of suppliers when creating an order.



The new PharmX Suppliers will automatically be listed and available for account creation, from within the PharmX Sign-up utility.



## Bug Fixes and other program changes

- An issue has been resolved where the rounding on discounted items remained on a Control Account after the rollover
- Account payments excluded from sales figures were still showing in the EOD report. This issue has been resolved
- General Under-Co Payment items that have their patient contribution increased to be more than the PBS Total price, will now turn private
- The Group Price Change module now allows changes to Stock Cards if the stock item does not contain a Supplier record
- Re-printing a Stock Transfer Invoice now displays the date that the transfer was done
- Return sales of Unlisted items were not being listed in the Unlisted Items section of the EOD. This issue has been resolved
- An issue has been resolved where PBS Online Report Transmission Errors were still displaying for new Claims when the item had been previously accepted
- Dispense Check Off - Original Instructions were showing as the previously dispense instructions. This issue has been fixed
- Edit and Delete workflows have been added to the Modeus DD-Book Cloud. Previously this was not available when using the Cloud Integration
- An issue where the Interaction window was opening out of sequence to the eScript Pane has been resolved for both Classic and Streamline workflows.
- We have made an adjustment to container fees. The 25ml container fee is now set to \$0.39 and the 150ml container fee will apply \$1.00 to your pricing structure.