

PocketScript™ e-Prescribing  
User's Guide  
with Exercises

**Pocket PC v5.51**

**zixcorp**™

CARE DELIVERY SOLUTIONS



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## What's New in Version 5.51

Major new features are as follows:

- New version information on Log In and About pages for improved diagnostics
- New Toolbar with shortcuts to Log Out, Queuing, Script Log, Help, and About screens
- Online Help for direct, immediate assistance

Additional improvements:

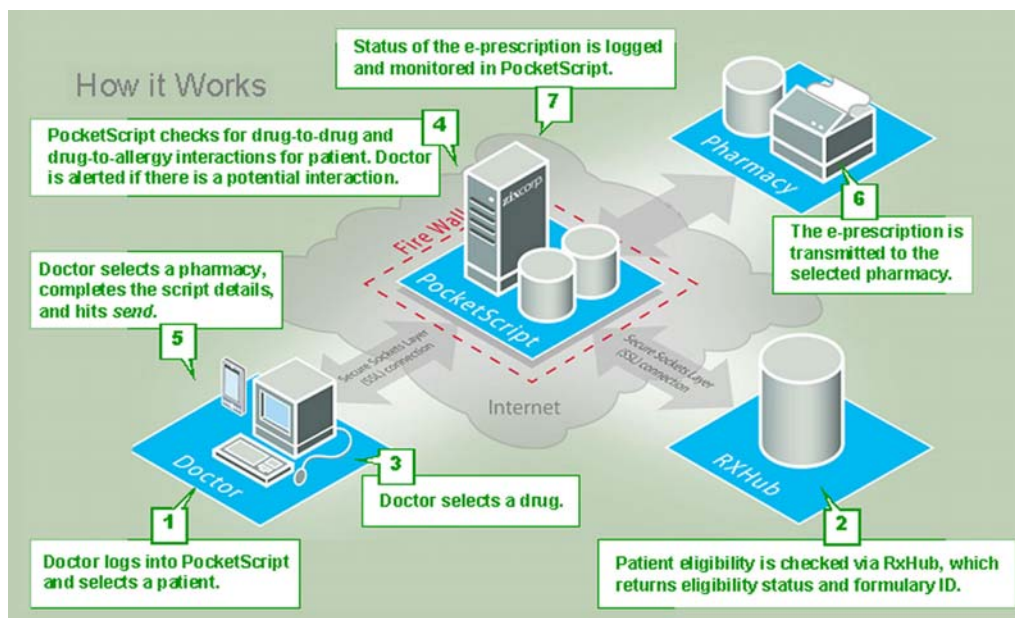
Internet Browser: the Script Maintenance search options are expanded to include Denied scripts, so that staff can easily identify renewal requests that prescribers denied.

All platforms:

- A queued script's Summary screen indicates the intended destination with “ \* ” on the Send or Print button.
- PocketScript displays a special message when dispensed drug information returned by the patient's insurance provider via RxHub lacks the identifiers required for drug interaction checking.

## 1.0 OVERVIEW

The ZixCorp® e-prescribing solution, PocketScript™, brings the accuracy and efficiencies of e-communication to the prescription process. But it does more than enable physicians to write and transmit prescriptions directly to the pharmacy. It provides point-of-care access to comprehensive drug information, including patient drug histories, drug-to-drug interactions, and detailed drug lists for multiple formularies.



The result is fewer rejected prescriptions, enhanced patient safety, and fewer resources dedicated to managing prescriptions. As easy to use as it is powerful, ZixCorp’s e-prescribing solution is delivered via a Pocket PC device or secure Web site to ensure maximum usability from anywhere.

## 2.0 DEVICE BASICS

### 2.1 Launching PocketScript

On the **Start** menu, select PocketScript.

### 2.2 Logging In

After you have launched the PocketScript program, you need to log in.

1. Using the keyboard, enter your **Physician ID**, if necessary. It may be entered for you.
2. Enter your password, and then tap **OK**.

Notes:

**Initial log in** - Your Physician ID is usually the first letter of your first name and entire last name. A password is provided for your initial login and you are required to change the provided password to one that you create. Your password must comply with the following security requirements:

- At least 8 characters in length
- At least 1 of *each* of the following: letter, number, special character (?><,./;:'"[]\|}{+=-\_\*&^%\$#@!)



3. If your practice has registered multiple printers in the Internet Browser version, Maintenance Pages>Doctor Maintenance, you are prompted to select a printer for this prescribing session. See the *Internet Browser User’s Guide and Exercises* for more information.

4. Write your signature with the stylus the way you want it to appear on the prescription. Tap **Continue** to proceed or tap **Clear** to erase the signature and rewrite it.



## 2.3 Time-outs and Security

### Password

There is a 20-minute password time-out period. After 20 minutes of inactivity, when you resume using PocketScript and attempt to send or print a prescription, the System Locked screen appears. You must reenter your password and tap **Verify** to send or print the prescription.

### Signature

The signature default time-out is 12 hours and it applies to the entire practice. You can change the practice signature time-out in the Internet Browser version Maintenance Pages>Practice Maintenance.

### Security Awareness

If your device powers off (manually or automatically) while PocketScript is open, PocketScript does not close. When power is restored, the PocketScript application appears. If this occurs within the password time-out period, you should be aware that e-prescribing is available to anyone holding the device.



## 3.0 WRITING A PRESCRIPTION

After you have logged in, the e-prescribing process is as follows:

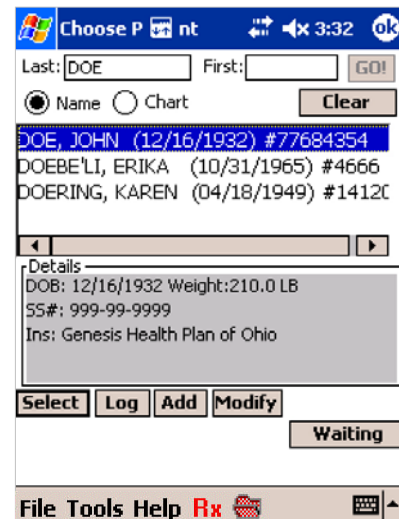
1. Select a patient.
2. Select a drug.
3. Complete the prescription details.
4. Send the prescription to the pharmacy.  
OR  
Print the prescription to give to the patient.

### 3.1 Selecting a Patient

You can search for a patient by name, by chart ID, or from a list of waiting patients who are scheduled for appointments.

#### Search by Name

- On the Choose Patient screen, select **Name**.



- Using the keyboard, enter the first 3-4 letters of the patient’s last name and then tap **Go**. It is not necessary to enter the entire last name.

### Search by Chart ID

- On the Choose Patient screen, select **Chart**.
- Using the keyboard, enter the chart number and then tap **Go**. It is not necessary to enter the entire chart number.

### Search by Waiting Patients with Appointments

Click **Waiting** to see a list of all patients with appointments that have been entered in the Internet Browser version.

Note: If queuing is enabled, the list also includes all patients who have refill requests in your queue for approval.

### All search methods

- A list of patients meeting the criteria appears.  
Note: If no patient is shown, you may add the patient to the system by tapping **Add**.
- Tap to highlight the desired patient and then tap **Select**.

Notes:

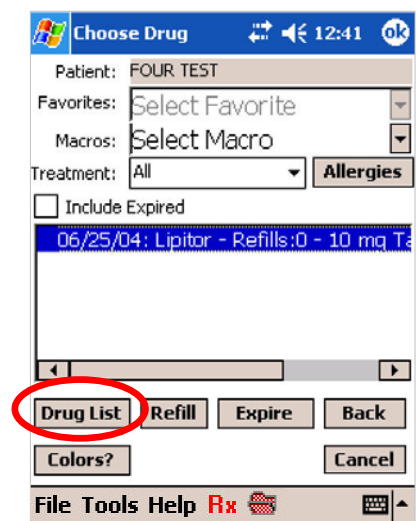
When you use the Name or Chart ID search method, the system checks patient insurance eligibility so that you have up-to-date information in prescribing. This may take a few seconds. If the appointment has been entered the day before, the information may already be available.

You can change patient demographic information while prescribing by tapping the patient’s name to highlight it and then tapping **Modify**. See Section 11.0 Modifying Patient Information.

## 3.2 Selecting a Drug

After you choose a patient by tapping **Select**, the Choose Drug screen appears with the patient’s drug history derived from your practice’s e-prescribing experience. The system provides three additional methods for selecting a drug. All four are described in detail below:

- Drug List
- Favorites and Macros
- Drug History
- Dispensed Drug History



### 3.2.1 DRUG LIST

The Drug List is an alphabetical listing of all available drugs.

To use the Drug List in prescribing, follow the directions below:

1. Tap **Drug List**. The **Choose Drug** screen appears.
2. Decide whether you want to select from a list of **All** drugs, or narrow the drug search to include only name **Brand** drugs, or just **Generic** drugs and tap the related button.

Note: In the Internet Browser version, Doctor Maintenance page, you may also make this selection and it will appear on the Pocket PC.

If you select **Generic** and enter a brand name drug for which there is no generic equivalent, the brand name drug will still be displayed and is available for your selection.

3. Using the keyboard, enter the first 3-4 letters of the drug's name and then tap **Go**. It is not necessary to enter the entire name.

Drugs that match the search criteria are displayed.

Generic drugs are shown with a "G" and Non-Generic (Brand) drugs are shown with an "N."



4. Tap to highlight the desired drug and then tap **Select** or double-tap the drug name.

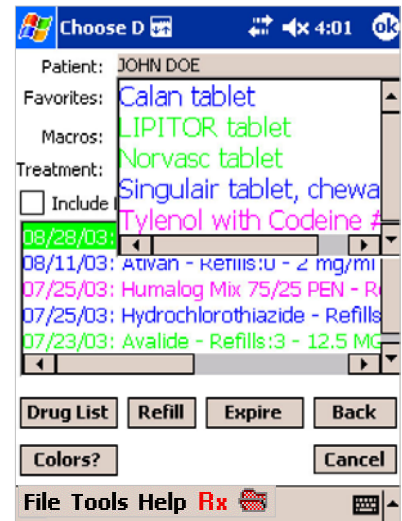
### 3.2.2 FAVORITES AND MACROS

**Favorites** are shortcuts to drugs that you prescribe frequently. Your favorites list can hold up to 200 different drugs.

1. On the **Choose Drug** screen, tap the down-arrow at the right of Select Favorites and your list of favorites appears.
2. To select a drug, double-tap the drug name to highlight and select it.

**Macros** are shortcuts to pre-written prescriptions and require little or no modification in order to complete the script. A few Macros are preloaded and can be edited.

1. On the **Choose Drug** screen, tap the down-arrow at the right of Select Macro and your list of Macros appears.
2. To select a Macro, double-tap the Macro name to highlight and select it.



### 3.2.3 DRUG HISTORY

You can use a patient's drug history to renew a prescription.

1. Select **Include Expired** to display all medications, both expired and unexpired.



- On the **Choose Drug** screen, the patient’s drug history is shown in the text box. Tap to highlight the prescription that you would like to renew and then tap **Refill**.

Note: After you renew a prescription, the original prescription is “expired” and no longer visible in the Patient Drug History table unless you select **Include Expired**.

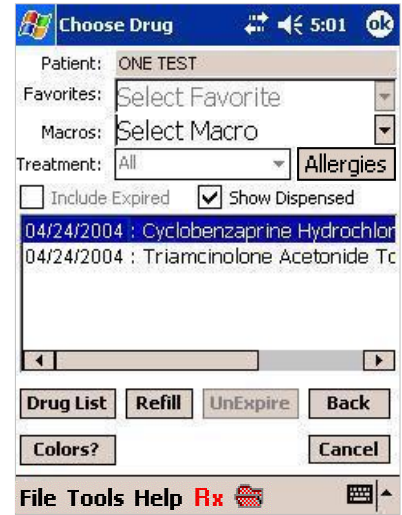
### 3.2.4 DISPENSED DRUG HISTORY (DDH)

Dispensed drug history (DDH) is different from the drug history developed via the ongoing use of PocketScript by your practice because it also includes medications prescribed by physicians in other practices/specialties and dispensed to patients.

PocketScript retrieves DDH, if available, and displays it if you request it. PocketScript checks DDH for drug-drug interaction and displays warnings if appropriate.

Note: PocketScript displays a special message when dispensed drug information returned by the patient’s insurance provider lacks the identifiers required for drug interaction checking.

Dispensed drug history is not available for all patients. For eligible patients, a **Show Dispensed** check box will appear on the **Choose Drug** screen.



- To show dispensed drug history, tap the **Show Dispensed** check box to select it. The prescription list refreshes and displays the patient’s dispensed drug history. If the PBM returns sufficient data, the drug history will be color-coded.  
 Note: The system can only display the data returned by the patient’s insurance provider via RxHub; this data may be incomplete due to their filtering or other access restrictions. For example, a provider may screen drugs used in the treatment of HIV/AIDS and substance abuse.

- Tap to highlight the medication that you would like to refill and then tap **Refill**.
- To return to the practice drug history, tap the **Show Dispensed** check box to clear it.

Note: If the **Show Dispensed** check box is not selected, only the drug history for your practice appears.

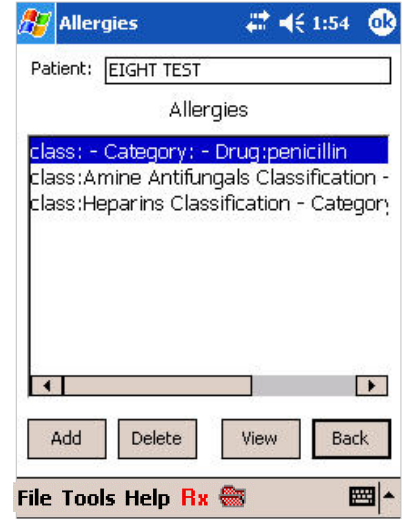
### 3.2.5 TREATMENT

The **Treatment** dropdown list box shows different types of treatment. Choose **Chronic** or **Acute** to display only those medications that are suitable for the selected type of treatment, or select **All** to view all medications.

### 3.2.6 ALLERGIES

Before selecting a drug, you can view a list of the patient’s allergies by tapping the **Allergy** button. A list of allergies that are drug or class-specific appears.

Note: If you select a drug to which the patient is allergic, the system automatically displays an Allergy Alert described in section 7.0 Checking Drug Allergies.



### 3.2.7 EXPIRE FUNCTION

The **Expire** button lets you manually expire a prescription so that the drug will no longer be considered when evaluating potential drug-to-drug interaction for this patient.

Tap the prescription to highlight it and then tap **Expire**.

### 3.2.8 FORMULARY COLOR CODES

Tap the **Colors?** button to view a list of formulary color codes and how they indicate whether a drug is covered by the patient’s drug insurance plan.

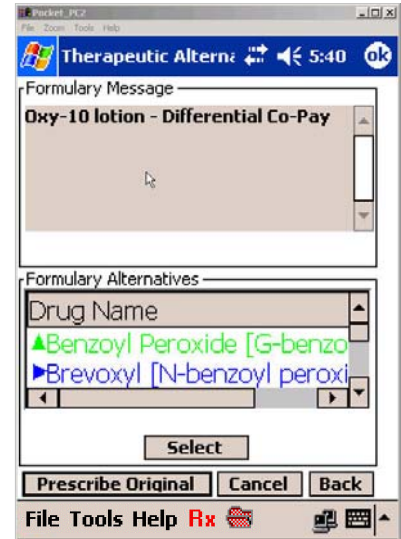
Color	Code	Comments
Black		Prescription insurance not on file.
Green	Preferred	Drugs covered by the health plan.
Blue	Approved	Drugs covered by the health plan, but taking a higher co-pay.
Purple	Requires Prior Authorization	Drugs for which the prescriber must submit a request for coverage under the medical review process. Selecting one of these drugs will display preferred and approved alternative drugs when information is available.
Red	Not Approved	Drugs that are non-formulary. Selecting one of these drugs will display preferred and approved alternative drugs when information is available.

### 3.2.9 PRIOR AUTHORIZATION AND THERAPEUTIC ALTERNATIVES

Drugs that require prior authorization or approval based on the formulary coverage for the patient are indicated by purple text and left-facing arrow (<). If you select a drug that requires prior approval, a message about the formulary coverage of the selected drug and a list of therapeutic alternatives approved by the formulary appear. See 8.0 Viewing Formularies.

In addition to a list of Preferred/Approved alternatives, PocketScript displays a text message that explains why there may be a better choice than the original selection, such as formulary status or a dispensing limitation.

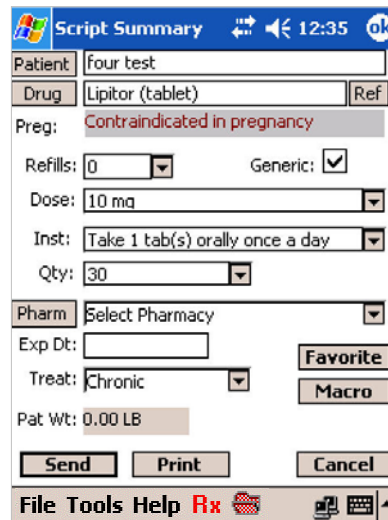
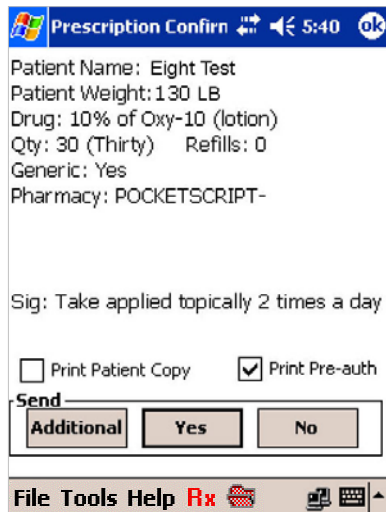
- To select a Preferred or Approved drug, double-tap it or tap to highlight it and then tap **Select**.
- Alternatively, you can proceed with prescribing your initial selection by tapping **Prescribe Original**.
- After you complete the script, you can print pre-authorization forms by selecting **Print Pre-auth**.  
**Important:** You must complete the form and sign it before faxing it to the patient’s plan, see 3.3 below.



### 3.3 Completing the Script

The details of the script are managed from the **Script Summary** screen. Using the stylus and the keyboard, you can enter and modify the values for dosage, refills, quantity, instructions, and pharmacy.

The formulary determines default dosage and quantity options. You can select from available options or key in desired values.



- After you click **Send** or **Print**, the Confirmation screen appears where you review the prescription before it is faxed to the pharmacy or printed.
- Select **Print Pre-auth** to print a pre-authorization form in the office. The form is partially populated with the prescription information for ease in completion.

**Important:** The form that is printed at your office must be **completed** and faxed to the health plan at the fax number shown on the form.

### 3.3.1 ENTERING SCRIPT DETAILS

#### Patient

Tap **Patient** to edit patient information or select a different patient and start over.

Note: Information on the Script Summary screen may be lost if a new patient is selected.

#### Drug

To select a different drug, tap **Drug** to go to the Choose Drug screen. If the drug is changed, the information on the Script Summary screen will be changed.

To view the PocketScript Drug Reference information concerning the prescribed drug, tap **Ref**. See section 13.0 PocketScript Drug Reference for details about the wide range of information available.

#### Pregnancy Warning (Preg)

Pregnancy warning information for the drug appears in this area.

#### Refills

- To the right of the **Refills** field, tap the drop-down arrow to display refill options and tap the number to highlight and select it.  
OR
- Tap the **Refills** field and type the number of refills.

#### Generic

Tap the **Generic** check box to select or clear the check mark, thus allowing (checked) or disallowing (unchecked) generic substitution for brand-name drugs.

#### Dosage

The default dosage is the lowest available. You can change the dosage amount as well as units such as cc, ml, etc.

- To the right of the **Dose** field, tap the drop-down arrow to display dosage options and tap to highlight and select a dosage.  
OR
- Tap the **Dose** field and type the desired dosage and unit, such as mg, cc, ml, etc.

#### Instructions

- To the right of the **Instructions** field, tap the drop-down arrow to display instruction options and tap to highlight and select an instruction.  
OR
- Tap the **Instructions** field and type the instructions.

## Quantity

In addition to quantity, you can key in units such as vial, box, etc.

- To the right of the **Quantity** field, tap the drop-down arrow to display quantity options and tap to highlight and select a quantity. Note: The default quantity is 30.  
OR
- Tap the **Quantity** field and type the quantity.

## Pharmacy

The Script Summary screen displays the patient's mail-order pharmacy, if included in the patient's pharmacy benefit plan, or the pharmacy most recently requested by the patient. For more options, tap the drop-down arrow to display any network pharmacies and up to five patient-favorite pharmacies used in the past. For new patients, the practice's favorites are listed.

If the patient wants to use another pharmacy, Basic Search enables you to search on pharmacy name or phone number. You can use Advanced Search to refine the search criteria.

Tap **Pharm** to select from the full pharmacy list.

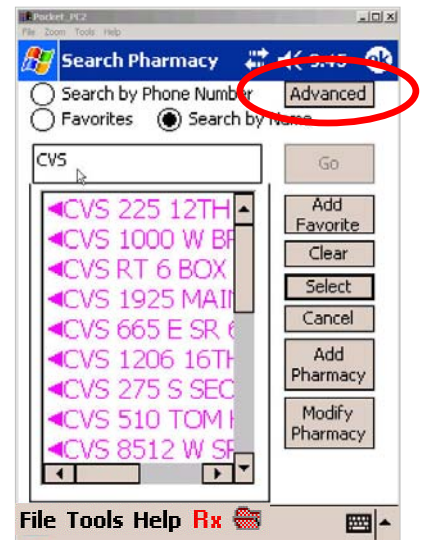
Note: Favorites are shown in green and other pharmacies are shown in purple.

## Basic Search

- Tap **Favorites** to select from the Pharmacy Favorites list. Highlight the desired pharmacy and then tap **Select**. PocketScript adds the newly selected pharmacy to the prescription information and will display it for future scripts for this patient.  
OR
- Tap **Search by Name** to select from the full list. Enter pharmacy name or town and tap **Go**. Tap to highlight the desired pharmacy and tap **Select**.  
Note: You can also add it to your Favorites list by tapping **Add Favorite**.  
OR
- Tap **Search by Phone Number**, enter the partial or full phone number or name information to find the appropriate pharmacy, and then tap **Go**.

## Advanced Pharmacy Search

Rather than search a long list of pharmacies, you can use Advanced Search to narrow the search criteria.



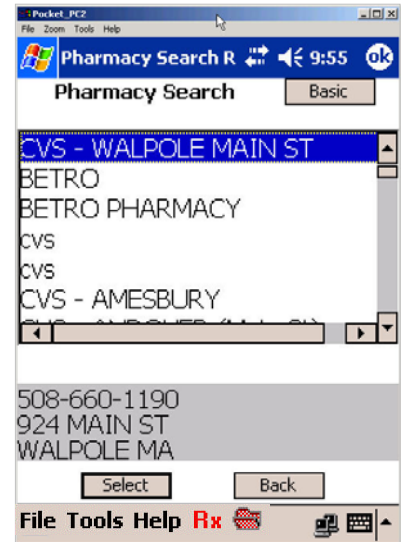
- Tap **Advanced** at the top right of the screen. (The button label changes to **Basic**.)
- Enter the information that you may have about the patient’s desired pharmacy. You can use any one or more of the available search fields. Tap **Go**.
- The search results are displayed in order of most matches with the search criteria. Note that the highlighted pharmacy’s details appear in the gray area below.
- With the desired pharmacy highlighted, tap **Select** and you are returned to the prescription detail screen, or tap **Back** to change the search criteria and try again.
  - To add a new pharmacy, tap **Add Pharmacy**. See 12.0 Maintaining Pharmacy Information.
  - To modify the currently selected pharmacy, tap **Modify Pharmacy**. See 12.0 Maintaining Pharmacy Information.

Notes:

Pharmacy Favorites are pharmacies that patients request frequently and are practice-wide, not prescriber-specific. Before deleting Pharmacy Favorites, be sure to consult with other prescribers in the practice. Also, be careful to avoid duplicating an existing pharmacy entry.

If you are upgrading from the on-site server version to the new access point version, you will now have access to the global pharmacy list maintained on the remote PocketScript-monitored servers and gain the following benefits:

- PocketScript can update the global pharmacy list more frequently with phone/fax number changes.
- You can e-prescribe for patients who are traveling.
- PocketScript can identify when pharmacies are having problems receiving faxes and can fix the problem for all sites.
- PocketScript can change the status of a pharmacy to “Print Only” if there is a problem, and then return it to normal status when the problem is resolved.



### Expiration Date (Exp Dt)

The system fills the **Expiration Date** field when you select a treatment (below). The Expiration Date is the date after which this script will no longer be considered for drug-to-drug interactions and is not related to the drug’s shelf life.

### Treatment (Treat)

To the right of the **Treat** field, tap the drop-down arrow to display course of treatment options and tap to highlight and select a treatment. This will enter an expiration date at which time the

script will be removed from the patient's current medication list. Expired prescriptions are not considered when evaluating drug-to-drug interactions. The options are as follows:

- Chronic - uses expiration date
- Chronic PRN - uses expiration date
- Acute 3 days – expires in 3 days
- Acute 5 days - expires in 5 days
- Acute 7 days - expires in 7 days
- Acute 10 days - expires in 10 days
- Acute 14 days - expires in 14 days
- Acute 1 month - expires in 30 days
- Acute 2 months - expires in 60 days

The Expiration Date is calculated based on the selected treatment and the number of refills. The formula is as follows:  $(\text{number of refills} + 1) * (\text{number of days on course of treatment})$ .

### **Patient Weight (Pat Wt)**

Double-tap the **Patient's Weight** and the Modify Patient screen appears where you can change the patient's weight. Note: Only the weight field can be edited on this screen.

### **Favorite**

Tap **Favorite** to save the current drug as a favorite. See 4.0 Adding a Favorite Drug.

### **Macro**

Tap **Macro** to save the current prescription information (excluding the patient's personal information) as a Macro. See 5.0 Adding a Macro.

### **3.3.2 CANCELING THE PRESCRIPTION**

To cancel the prescription, on the Script Summary screen, tap **Cancel**. You will be returned to the Choose Patient screen.

### **3.3.3 SENDING A PRESCRIPTION TO THE PHARMACY**

When all of the script details have been entered, you can send the prescription to the pharmacy.

1. Tap **Send** at the bottom of the screen. Note: The Send button is not available for over-the-counter drugs or Schedule 2 drugs in the PocketScript system. You must print the prescription and the prescriber must sign it and give it to the patient.

**Send** will fax the prescription to the selected pharmacy.

**Print** will print the prescription to the network printer in your office. If multiple printers are registered in the Internet Browser version, the script will be printed on the printer you selected when you logged on for this session.

**Note:** Printed prescriptions require a handwritten signature.

2. The **Confirmation** screen appears for you to check the script for accuracy. Select one of the following options:
  - To send the script *and write another script for the same patient*, choose **Additional**.
  - To send the script *and return to the Main Menu*, choose **Yes**.
  - To return to the Summary screen in order to make a change, choose **No**.
3. Select **Print Patient Copy** to print a voided copy of the prescription for the patient.
4. If you choose **Additional** or **Yes**, a confirmation box appears indicating that the prescription has been sent. Tap **OK** to dismiss the box and go to the selected destination.

### 3.3.4 PRINTING A PRESCRIPTION

Follow the above procedure for sending the prescription to the pharmacy, except select **Print** in step 1.

### 3.4 Logging Off and Exiting the Program

To logoff without exiting PocketScript:

Tap **File** and then tap **Logoff**.

To exit PocketScript:

1. Tap the **X** at the top right corner of the program.  
OR  
Tap **File** and then tap **Exit**.
2. In the Quit PocketScript dialog box, tap **Yes** to exit the program.

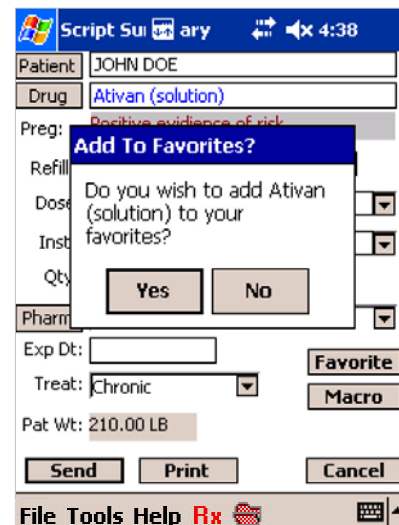


## 4.0 ADDING A FAVORITE DRUG

Favorites are shortcuts to drugs that you prescribe frequently. Your favorites list can hold up to 200 different drugs. Favorites are available for selection on the Choose Drug screen.

1. To add a drug to your Favorites list, on the Script Summary screen, tap **Favorites**.
2. Tap **Yes** on the Add to Favorites dialog box.

Note: To delete Favorites, use the Internet Browser version Maintenance Pages> Favorites Maintenance.





## 5.0 ADDING A MACRO

Macros are shortcuts to entire pre-written prescriptions and are available for selection on the Choose Drug screen. A few Macros are preloaded and can be edited. Macros can be developed when you are writing a patient's prescription or they can be entered using the Internet Browser version Maintenance Pages> Macro Maintenance.

Macros should be fully completed. The system will automatically insert default values in empty fields.

1. To add a Macro, on the Script Summary screen complete the script information exactly the way you want it to be saved.
2. Tap **Macro** and the New Macro screen appears.
3. Using the keyboard, enter a **Macro Name** (e.g. Lipitor 10, hypertension 1).
4. Tap **OK** and then tap **Yes** to save the Macro.

Note: To delete Macros, use the Internet Browser version Maintenance Pages> Macro Maintenance.



## 6.0 CHECKING DRUG INTERACTIONS

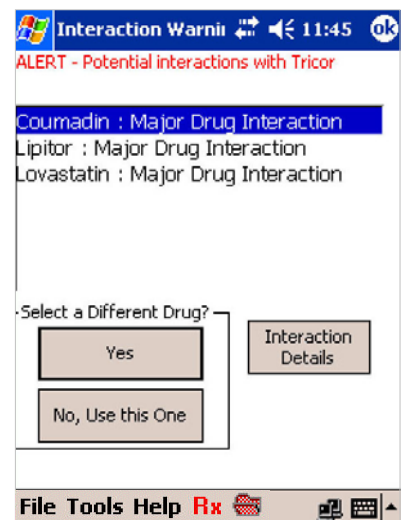
PocketScript provides decision-making support by automatically performing a drug utilization review (DUR). The system checks for interactions against other prescriptions written by the practice (and by others, if dispensed drug history is available). If any potential problems are detected, the system displays a **Drug Interaction Alert**. Drug alerts may be ranked by severity.

Notes:

PocketScript displays a special message when dispensed drug information returned by the patient's insurance provider lacks the identifiers required for drug interaction checking.

Expired prescriptions are not considered unless you select **Include Expired** on the Choose Drug screen.

1. To review information regarding drug interaction, double-tap the drug in question or tap to highlight it and then tap **Interaction Details**.



If you view the Interaction Details, tap **Back** to return to the Interaction Warning screen and make your decision about prescribing the drug.

2. In the Select a Different Drug dialog box, tap **Yes** to choose a new drug or **No, Use this One** to select the drug. Proceed to 3.3 Completing the Script.

## 7.0 CHECKING DRUG ALLERGIES

PocketScript automatically checks for patient drug allergies and if any are detected, displays an Allergy Warning. Note: Patient allergies are usually entered in the Internet Browser version Maintenance Pages>Patient Maintenance. You may also add allergy information from your Pocket PC after you select a patient and tap **Allergies** on the Choose Drug screen. See 11.0 Modifying Patient Information.

1. To view allergy details, tap **Interaction Details**.  
If you view the Interaction Details, tap **Back** to return to the Allergy Warning screen and make your decision about prescribing the drug.
2. In the Select a Different Drug dialog box, tap **Yes** to choose a new drug or **No, Use this One** to select the drug. Proceed to 3.3 Completing the Script.

## 8.0 VIEWING FORMULARIES

The formulary is a list of drugs covered by a health insurance provider or pharmacy benefit manager (PBM). When you select a patient with an insurance plan that participates in the e-prescribing system, you see information about the formulary status of drugs that may help you find a less costly solution for the patient. The e-prescribing system also identifies generic drugs that can aid in prescribing for other patients.

Note: Most patients with prescription coverage participate through their PBM in the e-prescribing real-time eligibility look-up system that automatically checks for up-to-date coverage and formulary information and displays it on your Pocket PC. The insurance plans of other covered patients may have provided formulary information to PocketScript that you can access when prescribing; however, your office staff must select the insurance company manually when the patient's record is added in PocketScript's Internet Browser version (see User's Guide and/or online Help for instructions).

### **Patients with insurance plans that participate in the e-prescribing system**

PocketScript indicates formulary medications that are covered by a patient's insurance plan by using color codes and arrows in displaying the drug information. See 3.2.8 for color definitions.

The formulary includes both the drug and dosage. A drug may be considered preferred or accepted at one dosage and require prior authorization at a different dosage.

Note: While the system provides information about the plan's formulary, the prescriber is free to select any drug using the system, whether or not it is in the formulary.

On the Choose Drug screen, tap the **Colors?** button.  
The formulary color key appears.

### Patients with insurance plans that do not participate in the e-prescribing system

For patients whose insurance providers are not included in the e-prescribing system, generic drug options are indicated in green text with “up” arrows.

### Patients without insurance

For patients without insurance, there is no color-coding; however, generic drug options are indicated in green text with “up” arrows.

### Formulary Option: Individual Patient Coverage

PocketScript displays general formulary information; however, some formularies may provide different levels of coverage to individual plan members. If the patient’s PBM supports coverage lookup through RxHub, the PocketScript system performs the following:

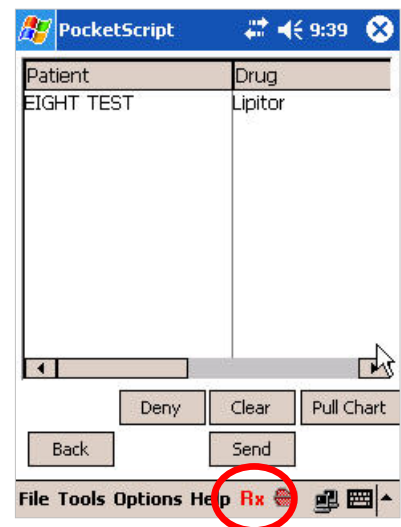
- Checks coverage detail with a real-time lookup for the specific patient and selected drug.
- Changes the color/arrow formulary indicators if the patient’s coverage is different from the general formulary.
- Displays a compliance message and suggested alternatives if necessary.

## 9.0 APPROVING QUEUED PENDING PRESCRIPTIONS

### 9.1 Queuing Process

Medical assistants can use PocketScript to set up prescription refill orders and “queue” them for physicians to approve. The medical assistant drafts the medication orders via the Internet Browser version at [www.eprescriber.com](http://www.eprescriber.com). The physician then approves the prescriptions on the Pocket PC portable device.

1. After you log in, if there are prescriptions in the queue for you to approve, a red Rx icon is displayed. To view these prescriptions, do one of the following:
  - Tap the **Rx** icon.  
OR  
Tap **Tools** on the bottom toolbar and then tap **Queuing**.
  - A list of queued scripts appears.
2. Tap to highlight the prescription you want to approve.  
Note: You can tap and drag the stylus to select multiple scripts.



3. Select from the following options:

**Send:** to approve and send the prescription to the designated pharmacy or office fax.

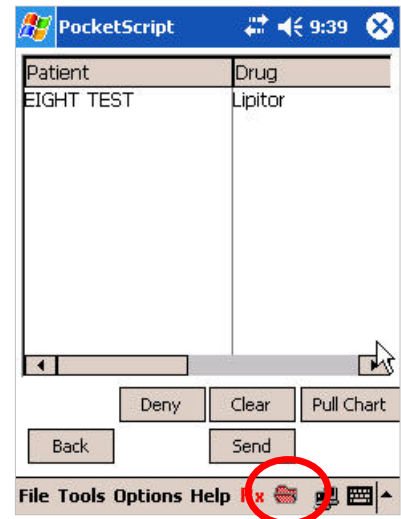
**Deny:** to cancel and not send the prescription, but send a record to the Script Log.

**Clear:** to remove highlighted scripts from the Pending Scripts box. This does not affect script status, just whether they are displayed.

**Back:** to go back to the previous screen.

**Pull Chart:** to mark the script and have the chart pulled. This returns the script to the originator queue in the practice. The script is removed from the list of queued scripts and the red Rx icon is changed to black (unless other scripts without chart pull requests remain in the queue).

A chart icon is on the bottom menu bar. The chart is tan-colored when there are no charts pulled and red-colored when an assistant confirms in the Internet Browser version that one or more requested charts have been pulled. Tap the chart icon to see the related scripts. After you send or deny chart-pull scripts, the chart icon color returns to tan.



**View Script details:** To view a queued script, double-tap it and the Script Summary screen appears. Make any desired changes. The queued script's Summary screen indicates the intended destination with “\*” on the **Send** or **Print** button.

## 9.2 Queued Scripts Display Options

The Options menu lets you sort, organize, and select the queued scripts that you want to review. You have the following options:

- **Charts:** pulled charts, requested charts, or charts with no chart information request
- **Script Authorization:** all prescriptions, pre-authorized only, or authorized pending  
 Note: Physician Assistants may queue scripts and “pre-authorize” them for prescribers. Scripts queued by Registered Nurses and Medical Assistants have “authorization pending” status.  
 Prescribers may choose to view “pre-auth only” scripts first to quickly approve and send them to the pharmacy, and then view “auth pending only” scripts which may require more review.
- **Doctor Scripts:** all prescribers or individual prescribers
- **Redirect To:** names of all prescribers in your practice
- **Location:** all locations, in office, or call in

## 10.0 VIEWING THE SCRIPT LOG

The script log enables you to view all of your scripts written using the PocketScript system within certain parameters.

To access the script log, do one of the following:

- Tap **Tools** on the bottom toolbar and then tap **Script Log**.  
OR
- Tap **Log** on the Choose Patient screen.  
The script log appears for the current day.

To change the timeframe, tap one of the following:

- Today (default)
- Yesterday
- 2 Days ago
- 7 Days ago

The log for the desired timeframe appears.

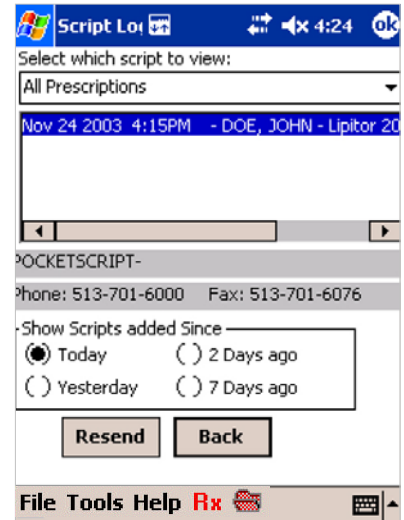
Once you are in the desired time frame:

1. Select which type of scripts to view from the drop-down list box.
  - All prescriptions
  - Scripts that were successfully transmitted to the pharmacy or printer
  - Scripts that had transmission errors
  - Queued scripts/refills that were denied when reviewed by the prescriber

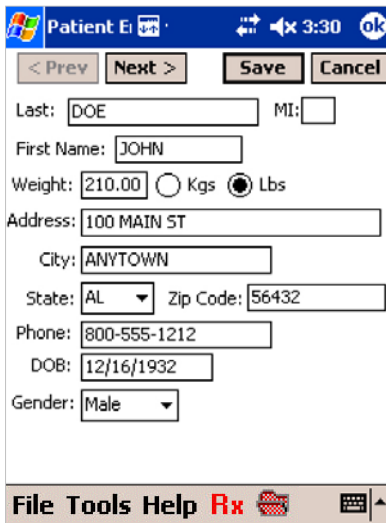
2. To view script details, double-tap the script.

The Script Log displays the following details for the selected prescription in addition to the script information you see on the Confirmation screen:

- Issued - date and time
- Status - whether or not script was successfully transmitted, or pending, if script was just recently sent
- Pharmacy details - including telephone and fax numbers

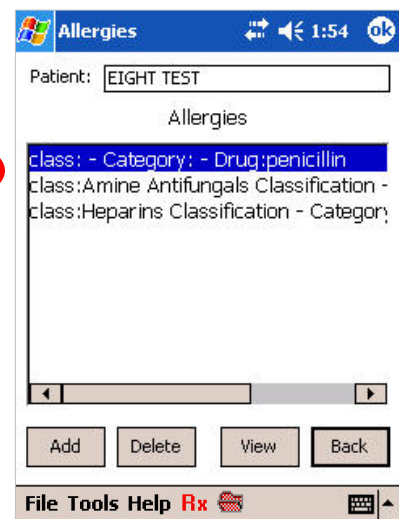
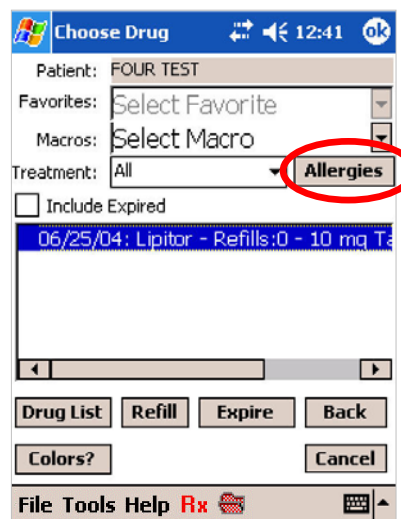


## 11.0 MODIFYING PATIENT INFORMATION



1. Modify a patient's demographic data by selecting the patient and then tapping **Modify**. The patient's information is shown on two screens.
2. Tap **Next>** to go to the second screen or **<Prev** to return to the first screen. For example, you can update the patient's telephone number when you are prescribing.

3. To add allergies from the Pocket PC, after you select a patient, on the Choose Drug screen tap **Allergies**. The Allergies screen appears.

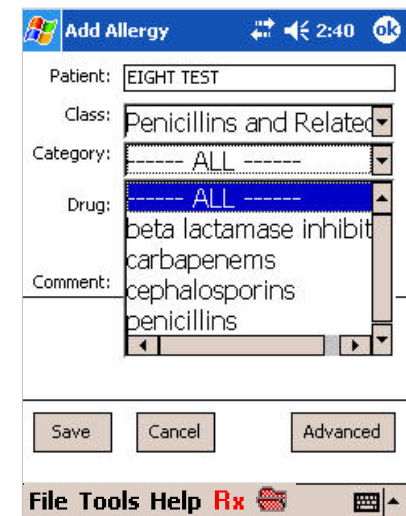


4. Tap **Add**. The Add Allergy screen appears.

5. Select an allergy **Class** by tapping the drop-down arrow, and then select a **Category** if available and desired by tapping the drop-down arrow.

AND/OR

6. To enter a specific drug, tap **Advanced**.
7. Using the keyboard, enter the first few letters of the drug name and tap **Go**. A list of drugs meeting the criteria appears.



8. Tap to highlight the desired drug and then tap **Select**.  
You are returned to the prior screen. The Drug Class and Category are displayed, if available.
9. To choose this Drug only and ignore its Class and Category in drug allergy considerations, tap **Drug Only**.
10. Enter any **Comments** in the space provided.
11. When done, tap **Save**.

## 12.0 MAINTAINING PHARMACY INFORMATION

During initial setup, most of the pharmacies in your area are entered into your PocketScript system. Over time, new pharmacies will be built and existing pharmacies may change their names or fax numbers and updates will be necessary. Most practices will perform maintenance via the Internet from the Browser version of PocketScript. You may also make changes from your handheld device.

To access the Add/Modify Pharmacy screens:

1. On the Script Summary screen, tap **Pharm**.
2. On the Search Pharmacy screen, tap **Add Pharmacy** or **Modify Pharmacy**.

### 12.1 Adding a Pharmacy

Be careful not to duplicate an existing pharmacy entry. The duplicate entries will appear on the pharmacy list that everyone in the practice will view.

1. From the Search Pharmacy screen, tap **Add Pharmacy**.
2. On the Add/Modify Pharmacy screen, enter the following information:
  - **Pharmacy Name - required** - usually the name of the chain and the street
  - Street Address, City, State, and Zip Code
  - Email Address
  - **Fax Number - required** if “fax or print only” option on the next screen will be set to “fax”
  - **Phone Number - required**
  - Password - specific certificate key for email encryption or to meet other state regulations
3. Tap **Next** to reveal the next screen and enter the name of the **Chain**, if applicable.

4. Select **Fax** or **Print Only**
  - Fax - enables the system to fax prescriptions using the fax number entered on the previous screen (with the exception of Schedule 2 and OTC drugs).
  - Print Only - prevents sending fax prescriptions to this site.
5. Select **Favorites** to add this site to the practice Favorites list.
6. Tap **Save** to add the pharmacy record.

## 12.2 Modifying a Pharmacy

1. After you have selected a pharmacy on the Search Pharmacy screen, tap **Modify Pharmacy**.
2. On the Add/Modify Pharmacy screen, make the needed changes to the pharmacy's information and then tap **Next**.
3. On the continuation screen, make any needed changes to the following and then tap **Save** to record the changes:
  - **Chain** name
  - **Fax** or **Print Only**
  - **Delete Pharmacy** – If selected, the pharmacy will not appear in the available list. It can only be added back in the Internet Browser version Pharmacy Maintenance page.
  - **Practice Favorites** – Select to add to Favorites; clear to remove from Favorites.

## 13.0 POCKETSCRIPT DRUG REFERENCE

The PocketScript Drug Reference is a comprehensive drug database that provides information on virtually every drug available to prescribers. Because keeping up with current drug offerings is critical, the information is updated continuously. Note: Medical supplies and equipment are not covered in the guide.

1. Access the PocketScript Drug Reference on the Script Summary screen by tapping **Ref**.  
The **General** tab appears (shown below) and displays a description of the drug.
2. To view more information about the drug, tap the tabs:

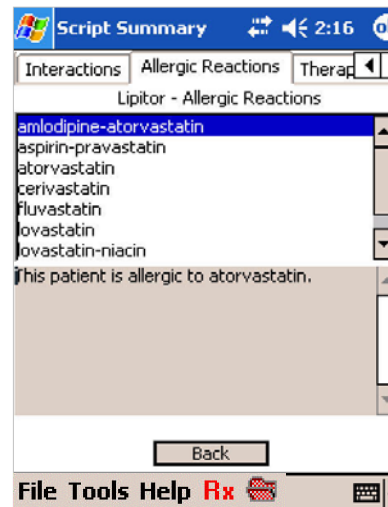
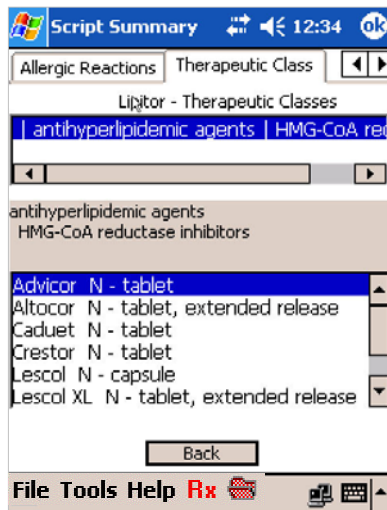
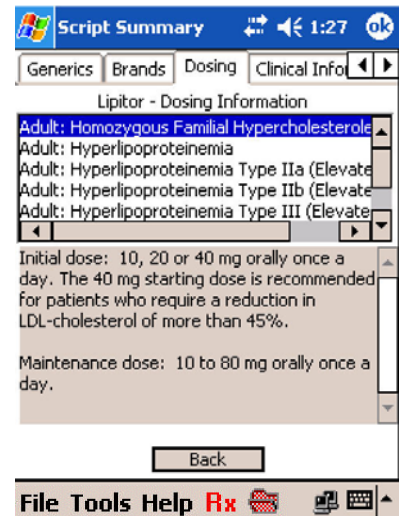
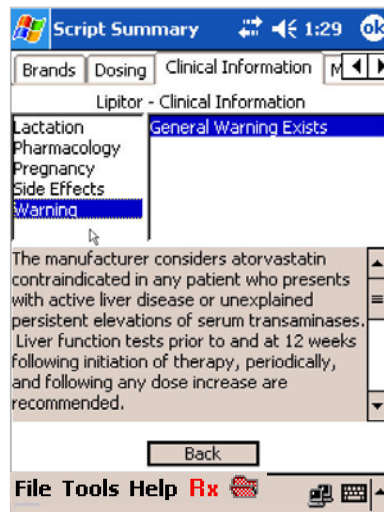
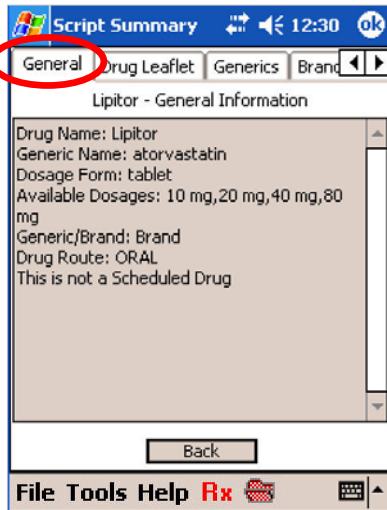
The screenshot shows the 'Script Summary' screen with the following details:

- Patient:** four test
- Drug:** Lipitor (tablet) **Ref** (circled in red)
- Preg:** Contraindicated in pregnancy
- Refills:** 0
- Generic:**
- Dose:** 10 mg
- Inst:** Take 1 tab(s) orally once a day
- Qty:** 30
- Pharm:** Select Pharmacy
- Exp Dt:** [Empty field]
- Treat:** Chronic
- Pat Wt:** 0.00 LB
- Buttons:** Send, Print, Cancel, Favorite, Macro
- Footer:** File Tools Help Rx



- Drug Leaflet
- Generics
- Brands
- Interactions
- Dosing
- Clinical Information
- Manufacturers
- Allergic Reactions
- Packaging
- Ingredients
- Contraindications
- Therapeutic Class

## Drug Reference Guide Examples



## 14.0 WORKFLOW HINTS AND TIPS

**e-Prescribing can be faster than writing a prescription on a pad if you use the shortcuts built into the PocketScript system.**

One shortcut is a **Macro**, a pre-written prescription that you create “on-the-fly” during the normal prescribing process and then can re-use. PocketScript remembers every detail of the script that you save in the Macro.

1. To create a Macro, first fill in the details of the script you wish to make into a Macro. Be sure to include details like the Course of Treatment and Refills!
2. On the Script Summary screen, tap **Macro**.
3. Give your Macro a name – name it something that you will remember later. For example, if you are prescribing Amoxicillin 250 mg, three times a day, you might want to call your Macro “Amox 250 3x.”

**You, your office staff, and patient all save time when you electronically transmit the prescription to the pharmacy.**

Your PocketScript system comes pre-loaded with most pharmacies in your area, but as new pharmacies open, you’ll want to include them, too.

1. Launch the PocketScript Internet Browser version Maintenance pages by clicking the **Maintenance** tab and then selecting **Maintenance Pages** from the menu.
2. Click **Pharmacy Maintenance**.
3. Click **Search All Pharmacies**, and then type in a portion of the pharmacy’s name.

Note that before you can add a pharmacy, you must first search for it in the database – this helps prevent duplicate entries.

**Speed patient selection by having office staff enter appointments for the following day on the Internet browser version.**

You can select the right patient more easily and quickly from a short list of those with appointments on the current day. At the end of the day, your staff can enter appointments for the following day. Adding appointments is easy:

1. Click the **Maintenance** tab, and then select **Maintenance Pages**.
2. Click **Scheduling Maintenance**.
3. Type the first few letters of the patient’s name last name or enter more details if desired and click **Search**.

4. Select the patient for whom you want to schedule an appointment and click the associated **See Patient page** link.
5. Type the **Date** (m/d/yyyy) and **Time** (h:mm) of the appointment and then click **Schedule**.

When you click **Waiting** on the Pocket PC or **Incoming Calls** on the BlackBerry, a list of patients with appointments on the current date appears.

**Use your office staff to help!**

Your office staff can connect to the Internet, go to <http://www.eprescriber.com>, and log in to the software to queue prescriptions in response to telephone requests for refills. These prescriptions will be ready to approve from the browser or your handheld device. This will save you many seconds – even minutes – that quickly convert to tangible dollar savings for you!

**Be sure to dock your Pocket PC when it's not in use.**

If your Pocket PC isn't docked, you could lose the PocketScript software loaded on the device. To ensure that this doesn't happen, a frequent prescriber recommends keeping the charger in a prominent location within the office. If you inadvertently leave the Pocket PC out of the charger, contact PocketScript Customer Support at (866) 753-9234.

**You don't have to sign your signature every time you log on to PocketScript.**

As a security precaution, after a certain period of inactivity, PocketScript requires that you re-enter your password. The security time-out default is 12 hours, so after your first login of the day when you enter your password and sign your signature, the rest of the day you will not have to sign your signature.

In the Internet Browser version, Practice Maintenance page, you can change the security time-out to a different time period if desired.

## 15.0 FREQUENTLY ASKED QUESTIONS

### Implementation

**Q: What kind of effort does it take on my part to be able to effectively implement ZixCorp's PocketScript system?**

A: To gain the full benefit of the PocketScript system, you must be prepared to write every script using the system. If scripts are written outside the system, your electronic records will be incomplete.

Initial information requirements from you and your staff include the following:

- Complete “data dump” from your patient management system
- Your favorite scripts
- Your favorite pharmacies

Most important, please make sure that everyone in your practice is prepared to work towards a successful implementation of electronic prescribing.

**Q: Will using PocketScript speed up prescribing?**

A: PocketScript can substantially reduce the time required for the prescribing process, especially after your practice has been using it for a while. A few examples:

- Renewal requests can be queued by your staff on the browser so that all you need to do is approve and send the scripts to the pharmacies.
- The patient's drug history is available on one screen - you don't need to leaf through pages of paper records.
- Drug interactions and allergies are flagged and detailed information is readily available, saving you time in looking it up.
- You have direct access to multiple formularies, so it's fast and easy to accommodate patients' needs.

### Pharmacies

**Q: Can PocketScript prescriptions be sent to all of my pharmacies?**

A: Yes, prescriptions can be sent to all pharmacies that accept fax prescriptions. During setup, all pharmacies in your geographic area are included in the system database with fax numbers that allow electronic transmission of your prescriptions.

If a particular pharmacy's fax machine is temporarily broken, or its fax information is not available, the pharmacy can be set to “Print Only.” This setting enables you to print your prescription and then sign and give to the patient.

You may add new pharmacies or edit existing pharmacy records as necessary. For assistance, contact Support at 866-753-9234.

**Q: What happens if the fax prescription is not received by the pharmacy?**

A: The first line of defense is office staff checking your Internet Browser Script Maintenance page at least twice a day to see if there are any problems transmitting scripts to the pharmacies. You can also check the Script Log on your device.

The PocketScript system continuously monitors system performance. If a fax prescription is not successfully received on the first attempt, retransmission is attempted every six minutes.

As a “safety net,” after twenty minutes the system generates an email to PocketScript staff who investigate the situation and take the necessary steps to ensure that your prescription is accurately and quickly transmitted.

**Q: Can I send prescriptions directly to mail-order pharmacies?**

A: Currently, Express-Scripts<sup>®</sup> AdvancePCS, and Medco<sup>™</sup> accept PocketScript-generated prescriptions. We are also working with other services to develop acceptable formats.

An interim solution is to print the prescription for the patient to submit directly to the mail-order service. In addition, please contact the mail-order customer service department and request PocketScript functionality. Your input, plus our continued relationships with these companies, will help us work towards a permanent solution.

**Q: What is recommended when patients do not know where they want to have their prescriptions filled?**

A: You could place a supervised printer near the patient sign-out area. Prescriptions could be printed on that machine, signed, and handed to patients as they leave.  
Note: Be alert so that patients get the right prescriptions and that they don't feel their personal relationships with the prescriber are impaired.

**Q: How can we correct or update pharmacy fax numbers?**

A: In PocketScript Internet Browser version, use the Maintenance Pages>Pharmacy Maintenance page to make changes to pharmacy information.

**Drugs and Formularies**

**Q: Does the drug database include durable goods such as diabetic supplies?**

A: Yes, the drug database includes medical supplies that you can prescribe in the same way that you prescribe drugs.

**Q: Why do I have to accept or reject the Multum license agreement every six months?**

A: Multum provides the drug information that is used in the PocketScript application. Under the terms of the Multum license agreement for this information, users of the data must reconfirm their acceptance of the agreement every six months.

**Q: Does Dispensed Drug History include all drugs prescribed by other practices?**

A: No, Dispensed Drug History may be incomplete. The displayed history will not include, for example, categories of drugs protected from disclosure by regulation or not paid through a patient's standard health plan process. Every three months, when you view Dispensed Drug History you will be reminded that it may be incomplete.

**Q: Can I write a prescription off-formulary?**

A: Yes, you always have complete freedom in prescribing.

### **Patients and Coverage**

**Q: Can I still e-prescribe if a patient's insurance plan is not in the system or the patient is not insured?**

A: Yes, the only difference you'll see is that the drugs are not color-coded and that all generic drugs are indicated with "up" arrows.

**Q: At start-up, how do I enter patient data in the PocketScript system?**

A: While your office staff can enter patient data manually, the best method is to produce a patient demographic data report from your practice management system and send it to ZixCorp to transfer the data into the system. Call ZixCorp's PocketScript technical service department at 866-753-9234 for information about a number of methods to accomplish the data transfer.

**Q: How do I add new patients to the PocketScript system?**

A: The most common way to enter a new patient's demographic data into the PocketScript system is to manually enter it from the desktop using a Web browser connected to the Internet. Another possibility is to link to your practice management system with a single directional interface.

You may also add patients directly from your handheld. You only need to enter the name, date of birth, gender, and zip code to get a match with the insurer.

**Q: Do I have to change patient demographic information from the handheld?**

A: No. You can change patient information using the browser version, logging into [www.eprescriber.com](http://www.eprescriber.com) and choosing Patient Maintenance from the Maintenance Pages on the Maintenance tab.

**Q: Does the PocketScript system link to my patient management system?**

A: ZixCorp offers a free HL7 interface that connects the PocketScript system to your practice management system. The HL7 requires a Windows 2000 PC or higher to run the PocketScript portion of the interface. Consult your practice management system vendor about link availability and cost issues for its system. Custom connectivity may also be available for your practice at an additional fee. Contact PocketScript Support at 866-753-9234 for more information on this service.

**Q: What is the difference between medical and prescription insurance plans?**

A: Prescription insurance only covers a patient's outpatient prescriptions while medical insurance covers a variety of medical products and services, including doctors' fees, lab tests, hospital stays, and inpatient drugs.  
Prescription insurance is provided under a medical insurance plan and may be administered by the medical insurance provider or a specialized pharmacy benefit management company (PBM). Patients covered under Medicare/Medicaid, however, may obtain separate prescription insurance.

**Pocket PC**

**Q: How long does the handheld battery charge last?**

A: Test results show that over 100 prescriptions can be written on one battery charge. Results vary based on usage.

**Q: Is it OK to keep the handheld prescriber plugged in 24/7?**

A: Yes. You cannot over-charge the battery or harm the e-prescriber in any way by allowing the unit to remain in its charging cradle.

**Q: Does speech recognition work on my system?**

A: The PocketScript system is the first in the industry to use voice to instantly access patient and prescription information at the point of care. The system combines a patient's name with your Macro list to quickly generate a prescription with minimal tapping on the PDA screen.

**Q: Where can I access information about my handheld device?**

A: The device was shipped with a manual. PocketScript also provided this manual to cover the most common questions and concerns about using the device. Additional information may be found on the PocketScript Web site <http://www.zixcorp.com/caredel/> or the device manufacturer's Web site.

**Q: Can others use my handheld device?**

A: Yes. Any prescriber with a valid username and password can use any available handheld to write prescriptions with the PocketScript application. All of your personal information is stored on the server, not on the handheld; therefore your customized Favorites and Macros lists are available to you when you log on to any handheld device.

## Data and Security

**Q: Where is my patient and prescription data stored if it isn't on my handheld?**

A: Your data is stored in the SysTrust™ and SAS-70 certified, HIPAA-compliant ZixData Center™. Access to this data center is controlled by various methods, including biometric finger scanning and security codes.

**Q: What information does the PocketScript system collect about my prescribing practices?**

A: The PocketScript system only collects information about the number of scripts written and certain statistical information. All patient demographics are stripped from the reported data. Patient privacy is totally secure.

**Q: How secure is the PocketScript system?**

A: The PocketScript e-prescriber provides security on many levels:

- Your password is required at log on.
- If the handheld is unused for a period of time, you must re-enter your password.
- All patient and prescription information is transmitted through a 128-bit or higher encryption mechanism.
- Each prescription has a unique PocketScript ID number associated with it. This number assures the pharmacy that any script received through PocketScript is authentic.

The security of PocketScript also relies upon you to control access to your handheld device. Just as prescription pads should not be available to unauthorized persons, once you log on to your handheld it should not be left unattended.

**Q: How does the ZixCorp PocketScript product relate to HIPAA?**

A: PocketScript uses HIPAA-compliant methods to securely transmit your patient's data between you, the prescriber, and the patient's pharmacy.

**Q: Does HIPAA impact use of the ZixCorp PocketScript product?**

A: Yes, if Dispensed Drug History is available for a patient, you must ask the patient's permission to view it. Dispensed Drug History displays prescriptions written by other practices that participate in the system. Providers may screen drugs such as those used in the treatment of HIV/AIDS or substance abuse.

## Other Applications

**Q: Can I use the PocketScript system handheld to store and manage my personal information / schedule?**

A: Yes. Each PocketScript handheld e-prescriber comes with all of the basic Pocket PC functionality including the following programs:

- Calendar
- Contacts (Address Book)
- Inbox (E-Mail)
- Notes
- Internet Explorer
- Pocket Excel
- Pocket Word



**Caution:** In some cases, troubleshooting and repairing PocketScript problems may require a memory reset of your handheld and result in the loss of personal data. If you depend on the data contained in these programs, be sure to “hot-sync” your handheld to a computer other than the PocketScript system server to prevent possible data loss. Consult the handheld manual for more information.

**Q: Can I browse the Internet from my PocketScript system handheld?**

A: Probably. Most networks are compatible with the Linksys Wireless Router. If this is the case, your handheld will be automatically configured for Internet access. To start browsing the Internet, simply launch Microsoft Internet Explorer from the Start menu. If you have problems, our Support staff can help with common network troubleshooting tasks. More advanced network troubleshooting and/or setup are available at an additional cost. Call 866-753-9234 for more details.

**Q: Can I run other applications on the PocketScript system handheld?**

A: Yes. ZixCorp encourages you to use your handheld device for its PDA functionality. ZixCorp, however, does not support third-party software. Additionally, a poorly written application could interfere with the PocketScript application, cause the handheld to malfunction, and require a hard reset of the device to restore the PocketScript system.

**Q: Can I print from Pocket Word, Pocket Excel, etc.?**

A: Yes, you can “hot-sync” your handheld with another computer and use that computer’s print capability.

## 16.0 TROUBLESHOOTING

If you are experiencing network, device, or application problems, the following are some simple troubleshooting steps that you may try. If the troubleshooting steps do not resolve the issue, contact PocketScript Support by telephone at 1-866-753-9234 or email [pssupport@zixcorp.com](mailto:pssupport@zixcorp.com).

**Pocket PC** touch screen is too dim:

- On the Start menu, tap **Settings**.
- Tap the **System** tab at the bottom of the screen, and then select **Brightness**. Keep in mind that increasing the screen brightness reduces battery life. When the device is in the cradle on external power, the brighter the screen, the more time required to recharge the battery.
- Move the slider to the right to increase the brightness of the display.  
**On battery power:** for when the device is not in the cradle.  
**On external power:** for when the device is docked and you are drawing power from an external source.

**Pocket PC** touch screen keeps going dark:

- Follow the instructions above to get to the **Brightness** screen. Keep in mind that increasing the amount of idle time before the screen dims reduces battery life. When the device is in the cradle on external power, it also increases the time to recharge the battery.

- Tap the **Battery Power** tab at the bottom, and then tap the drop-down arrow to select a new amount of idle time before the screen dims.
- Tap the **External Power** tab at the bottom, and then tap the drop-down arrow to select a new amount of idle time before the screen dims.

**Pocket PC won't power on:**

- Dock the Pocket PC securely in the cradle that is connected to the AC adapter and a power source.
- Check that the power source is on.
- Charge the main battery for at least 4 hours.
- Press the **Power** button on the front of the Pocket PC.
- On the Start menu, tap **Programs**, and then tap **PocketScript**.  
If PocketScript does not open, call PocketScript Support or follow the instructions on PocketScript setup in section 18.1.2 Setup for New Installations below to reload the application.

**Linksys router:**

- The **Power** and **Wireless** lights on the router should be a constant green.  
If the **Power** light is red or not lit, check your power source and connection.
- The **Internet** light on the right should be green and flash.  
If the Internet light is not lit, check that the Internet cable is securely connected at the source and at the Linksys.
- The four **Port** lights in the middle will not be illuminated unless you have connected multiple PCs to the ports in the back of the Linksys.

**DNS not found** error message on the Pocket PC:

- Use the stylus to press the **Reset** button on the side of the Pocket PC.
- Disconnect the Internet cable from the back of the Linksys router, and then reconnect it.
- If the problem persists, contact PocketScript Support.

**Network not found** error message on the Pocket PC:

- Try the steps above for the **DNS not found** error message and see if that resolves your problem.
- If the problem remains, on the Pocket PC Start menu, tap **Settings**.
- Tap the **Connection** tab at the bottom of the screen.
- Tap **Wireless Networks**.
- In the Wireless Networks box, below Add New Settings... check to see if **psuser** is connected. If yes, contact PocketScript Support.
- If **psuser** is unavailable, tap the **Network Adapters** tab.
- Tap **Agere Wireless Network Driver (H2)**.
- Accept the next screen, select **Server-assigned IP address**, and tap **OK** in the upper right corner.
- The Adapters box appears. Tap **OK** in its upper right corner.  
Note: Do **not** remove the TrueMobile CompactFlash card from the device.
- Tap the **OK** or **X** in upper right corners of the screens to return to the main menu.

- Tap the PocketScript icon or select PocketScript from the Programs menu. If you still have problems connecting, use the stylus to press the **Reset** button on the side of the Pocket PC.
- Retry opening PocketScript and if there is still no connection, contact PocketScript Support or see the Appendix, 19.1.2 Setup for New Installations, PocketScript Setup.

## 17.0 POCKETSCRIPT SUPPORT

On the bottom toolbar, tap **Help** and then select **Help** to view online Help that will guide you through the basic e-prescribing process.

In addition to this *PocketScript e-Prescribing User's Guide with Exercises for Pocket PC*, your practice can download the *PocketScript™ Internet Browser User's Guide with Exercises* from the online Help. You also receive the following material at start up:

- *Quick Start Guide*
- Device guides and manuals

For additional assistance in using PocketScript, you can also telephone PocketScript Support at 1-866-753-9234 or email [pssupport@zixcorp.com](mailto:pssupport@zixcorp.com)

## 18.0 DOCUMENTATION FEEDBACK

Your comments and suggestions on PocketScript online Help and printed documentation are welcome. Please send documentation feedback to [caredel.documents@zixcorp.com](mailto:caredel.documents@zixcorp.com).

## 19.0 APPENDIX

### 19.1 Setting up the Pocket PC - Upgrades and New Installations

The procedures below *outline* the process for upgrading or installing PocketScript's new access point version for the Pocket PC. These procedures may vary from practice to practice.

#### 19.1.1 UPGRADE FOR EXISTING POCKET PC INSTALLATIONS

- Your office needs to arrange for your upgrade with Installation Support, telephone 1-866-753-9233. PocketScript representatives will do the following:
  - Schedule time for data conversion.
  - Check to make sure that the appropriate ports and network connectivity are available.
  - Make sure that your site has DSL or cable Internet connections.  
Note: Hospital network connections to the Internet are not recommended.
- The existing PocketScript site server patient database will be disabled and Internet connectivity established to the hosted PocketScript patient database.

Optionally, you may also establish connectivity to your practice management system with a free HL7 connection.

- A PocketScript representative will provide the software and instructions to load the PrintServer software on the old server or a PC to enable remote printing at your site.

### 19.1.2 SETUP FOR NEW INSTALLATIONS

**Important:** Request detailed installation instructions from Installation Support, telephone 1-866-753-9233. The following is an outline for general information purposes only.

#### Hardware Setup

- Install the Linksys® access point at the site.  
The Linksys acts as a router and firewall, creating a link between the Internet and any computers attached to the router. It also creates a Wireless Local Area Network among your Pocket PCs. Additionally, the router connects you via the Internet to the PocketScript secure servers that store your patient demographic data, pharmacies, and the databases that supply drug information, formularies, and patient eligibility information.
- Refer to the foldout card shipped with your Pocket PC and follow the step-by-step setup instructions. Be careful not to connect your device to your PC until you are prompted to do so.

#### Linksys and Pocket PC Software Setup

- Contact your Internet Service Provider (ISP) for the information particular to your high-speed Internet connection.
- Set up the Linksys software with the settings you obtain from your ISP and generate the WEP Key.
- Synchronize your Pocket PC with your desktop calendar, contacts, email, etc.
- Install the TrueMobile™ CompactFlash card driver furnished by PocketScript to configure your wireless network.

**Important:** Do **not** install the driver on the device CD-ROM.

#### PocketScript Setup

Use this procedure for initial setup and to reinstall PocketScript if your Pocket PC experiences a complete power loss, resulting in the loss of the PocketScript application.

Note: None of your practice data is stored on the device; your practice data will always be intact in the event of power loss to your device.

- On the Start menu of your Pocket PC, tap **Internet Explorer** to open the browser.
- If the address bar isn't visible, tap **View** at the bottom of the browser window, and then tap **Address bar** to select it.

- Tap in the Address bar to highlight the current address and replace it by typing <https://www.eprescriber.com/handheld> and then tap **Go**.  
**Important:** Be sure to add the “s” for the secure hypertext transfer protocol (https).
- Follow the on-screen instructions:
  - Type your **User ID** and **Password** and tap **Login**.  
Note: Your User ID must be activated by logging in to the Internet Browser version of PocketScript as detailed on the PocketScript Welcome card shipped with your device.
  - This will automatically initiate the download of the PocketScript application.
  - After several files download to the device, you are returned to the login screen. Log in again.

You are now ready to begin e-prescribing with your Pocket PC.

## 19.2 Installing Local PrintServer

ZixCorp e-prescribing solution enables you to print scripts, patient copies (voided), and reports to any printer in your facility that is connected to a PC with high-speed Internet access and running Windows® NT 4 or higher. Follow the procedures in the *Internet Browser User's Guide with Exercises*.

Local PrintServer setup is a two-step process:

1. Install PocketScript PrintServer on an office PC with high-speed Internet access (see Section 21.1 Appendix: Installing Local PrintServer).
2. Add your printer(s) in the Browser version of PocketScript. See Section 14.2 Doctor/User Maintenance in the *PocketScript Internet Browser User's Guide*.

## 20.0 EXERCISES

### *Initial Log On*

### *Test Patients and Pharmacy*

### *New Prescription Workflow*

#### *Exercise 1: Selecting a Patient*

#### *Exercise 2: Selecting a Drug*

#### *Exercise 3: Completing the Prescription*

#### *Exercise 4: Sending a Prescription to the Pharmacy*

### *Refill Workflow*

#### *Exercise 5: Refilling Prescriptions from Drug History*

#### *Exercise 6: Approving Refill Requests*

### *Initial Log On and Device Basics*

For basic information about the Pocket PC device and launching PocketScript, see Section 2 of this User's Guide.

### *Test Patients and Pharmacy*

The PocketScript system includes several patients with last names of Test and a pharmacy named PocketScript Test so that you don't have to use real patient data or pharmacies when you are trying out e-prescribing. Do not delete the test patients and pharmacy because new staff members can practice with them in the future.

### *New Prescription Workflow*

#### *Exercise 1: Selecting a Patient*

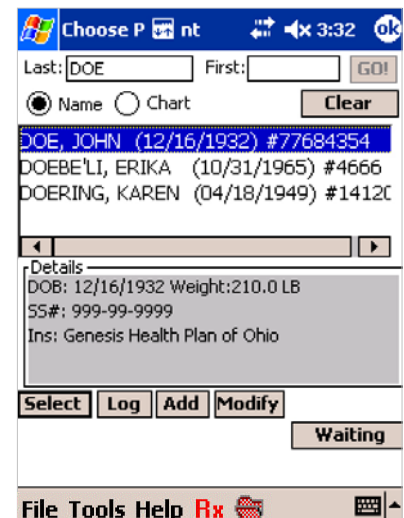
You can search for a patient by name or by chart ID.

1. On the Choose Patient screen, select **Name** or **Chart**.
2. Using the keyboard, enter the first 3-4 letters of the patient's last name. It is not necessary to enter the entire last name.

Type *tes* and then tap **Go**.

A list of patients meeting the criteria appears.

3. Tap to highlight any patient with the last name **Test** and then tap **Select**.



### Exercise 2: Selecting a Drug

PocketScript provides several methods for selecting a drug:

- Drug List, described in detail below
- Drug History, see Exercise 5 below and more details in Section 5.3 in this User's Guide
- Macros, see Section 5.2 in this User's Guide

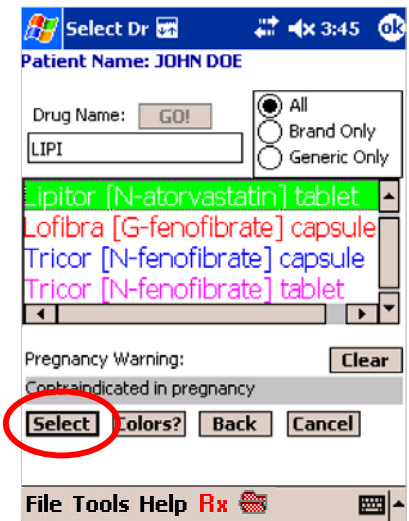
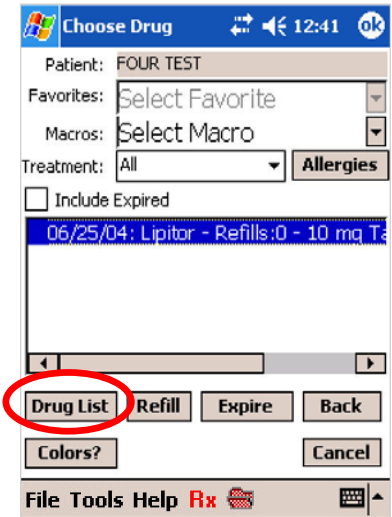
#### To Choose from the Drug List

1. Tap **Drug List**. The **Choose Drug** screen appears.
2. Using the keyboard, enter the first 3-4 letters of the drug's name. It is not necessary to enter the entire name.

Type *lipi* and then tap **Go**.

Drugs that match the search criteria are displayed.

3. Tap to highlight *lipitor*.
4. Double-tap the drug name or tap **Select**.



### Exercise 3: Completing the Prescription

The details of the script are managed from the **Summary** screen. You can enter and modify the values for dosage/units, refills, quantity, instructions, and pharmacy. Here we will manage the pharmacy.

The most recently faxed pharmacies for the patient are displayed on the Script Summary screen.

1. Tap **Pharm** to select from all the pharmacies that the practice uses.
2. Tap **Search by Name** to select from the practice-wide list.
3. Enter the first 3 or 4 letters of the pharmacy's name, *poc*, and then tap **Go**.
4. Tap to highlight the **PocketScript Test** pharmacy and tap **Select**.

**Exercise 4: Sending a Prescription to the Pharmacy**

When all of the script details have been entered, you can fax the prescription to the pharmacy.

1. Tap **Send** at the bottom of the screen. Note: The Send button is not available for over-the-counter drugs or Schedule 2 drugs in the PocketScript system.
2. The **Confirmation** screen appears for you to check the script for accuracy.

Choose **Yes** to send the script.

3. A confirmation box appears indicating that the prescription has been recorded. Tap **OK** to dismiss the box.

**Send** will fax the prescription to the selected pharmacy.

**Print** will print the prescription at the network printer. Note: Printed prescriptions require a handwritten signature.

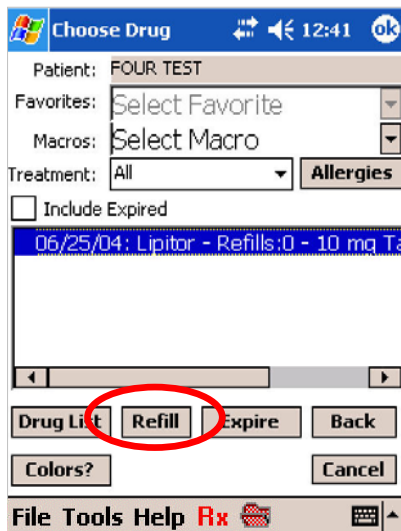


**Refill Request Workflow**

**Exercise 5: Refilling Prescriptions from Drug History**

You can use a patient’s prescription history to refill a medication.

- Use the procedure above to select the same test patient.
- On the **Choose Drug** screen, the patient’s drug history is shown in the text box.
- Note that the prescription you wrote for Lipitor above is now listed in the patient’s drug history.



- Refills are fast and easy.
  - To refill, do the following:  
Tap the prescription to highlight it and then tap **Refill**.
- All the details of the original prescription appear on the Script Summary screen.
- If no changes are required, the refill is ready to send to the pharmacy. Just click **Send** as shown in Exercise 4 above.

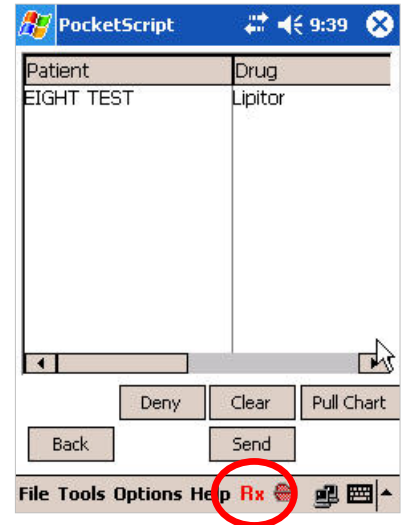


**Exercise 6: Approving Refill Requests**

A test patient refill request should first be entered in the Internet Browser version to follow this exercise.

When you have refill requests waiting for your approval, the **Rx** icon at the bottom of the screen appears red.

1. Tap the **Rx** icon.  
OR  
Tap **Tools** and then tap **Queueing**.  
A list of patients with queued scripts appears above.
2. Use the horizontal scroll bar to see the refill details.
3. Tap a test patient name to highlight and select it.
4. To approve the refill request, click **Send**.



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