



Electronic Signature Capture

User Guide

Table of Contents

Electronic Signature Capture	2
Configuration – Store	2
Configuration – Work Station.....	2
Configuration – Customized Workflow	8
Customizing the Fill Regular Rx Workflow	9
Verify Data Entry.....	11
Package Rx	12
Verify Rx Packaging.....	13
Clinical Verification.....	14
Capturing Electronic Signatures	15
Viewing Electronic Signatures	31

Electronic Signature Capture

Kroll provides the functionality needed to capture and store electronic signature images using the Wacom STU-500 LCD electronic signature tablet. There is flexibility as to where users can configure the requirement for an electronic signature, which is outlined in this document.

Configuration – Store

The following Store configuration settings must be in place before you use the electronic signature tablet.

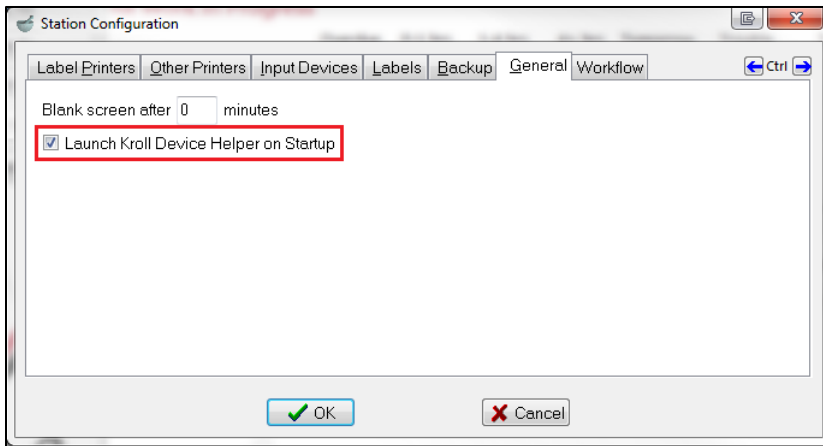
1. Go to **File > Configuration > Store**. The **Store Level Configuration Parameters** screen will appear. Select the **General** tab and ensure the option **Allow Electronic Signatures** is enabled.

NOTE: This step only needs to be performed at one work station.

Configuration – Work Station

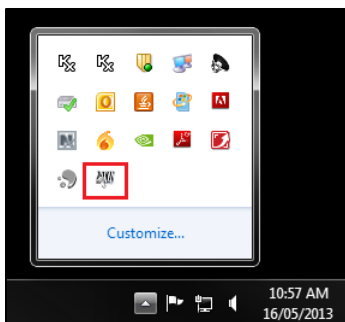
The following Work Station configuration settings must be in place before you use the electronic signature tablet.

1. Go to **File > Configuration > Work Station > This Work Station**. The **Station Configuration** screen will appear. Select the **General** tab and ensure the option **Launch Kroll Device Helper on Startup** is enabled. If this option is not enabled, click the check box. When you are finished, click **OK**.

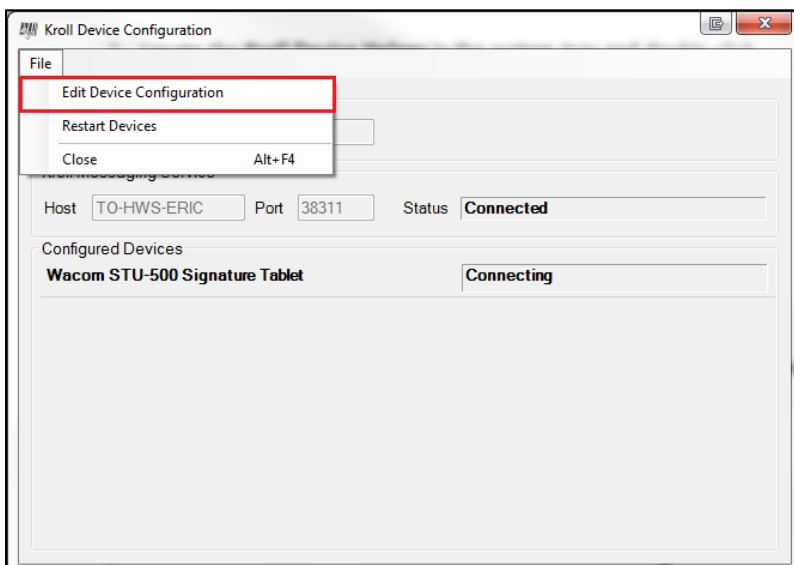


NOTE: If you manually checked this configuration option, you must exit and log back into Kroll to retain the configuration change. Do not make any additional configuration changes before you exit and log back in to Kroll.

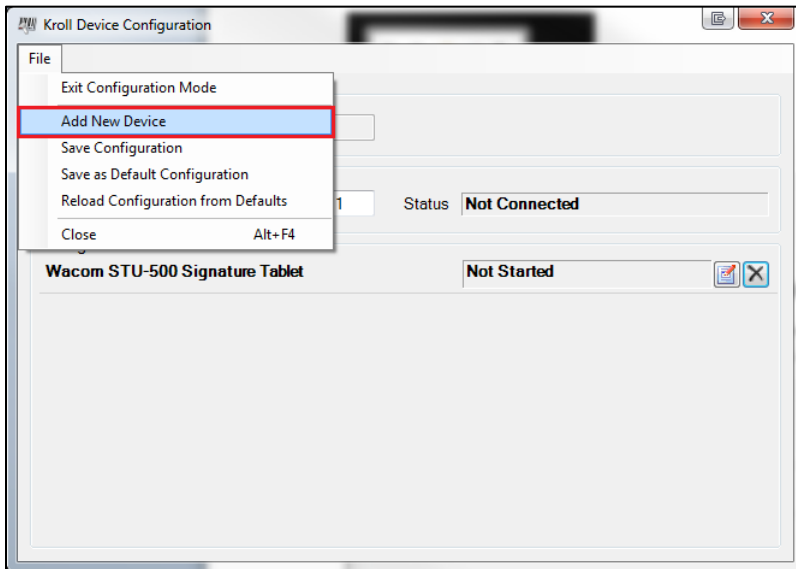
1. Locate the **Kroll Device Helper** in the system tray and double-click the **Kroll Device Helper** icon.



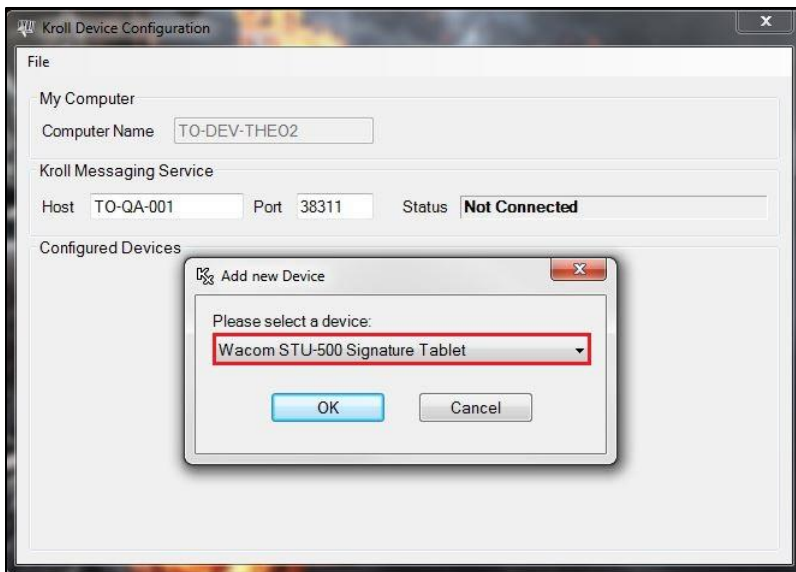
2. The **Kroll Device Configuration** screen will appear. Select **File > Edit Device Configuration**.



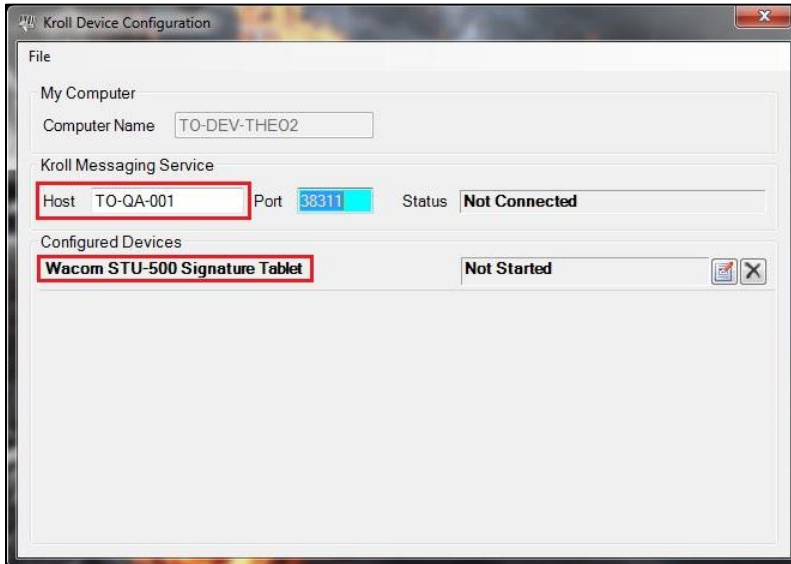
3. Select **File > Add New Device**.



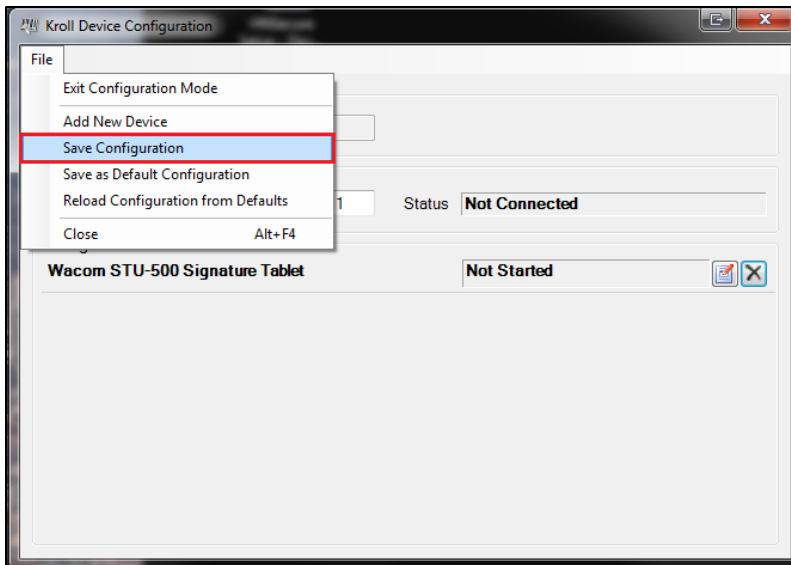
4. The **Add new Device** window will appear. Select your electronic signature tablet from the dropdown menu and click **OK**.



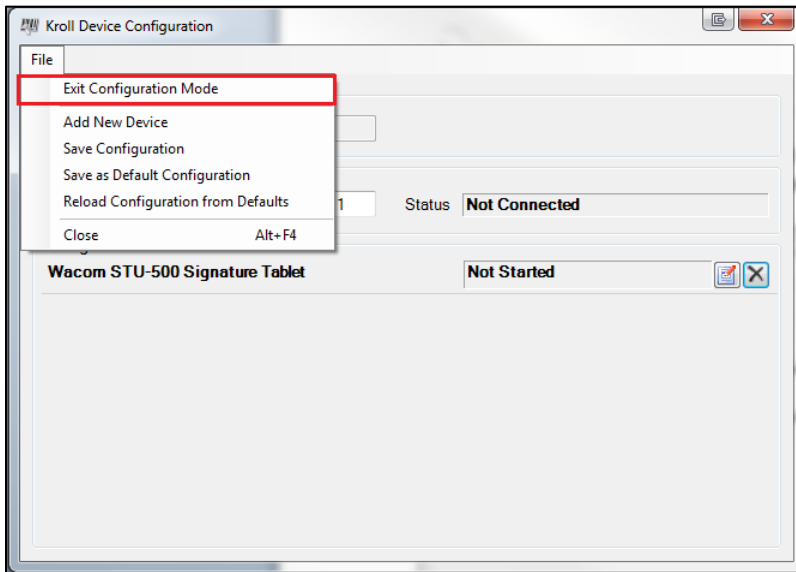
- The electronic signature tablet will be listed under **Configured Devices** in the **Kroll Device Configuration** screen. Ensure the **Kroll Messaging System** is configured for the correct host (the server name where the service is installed).



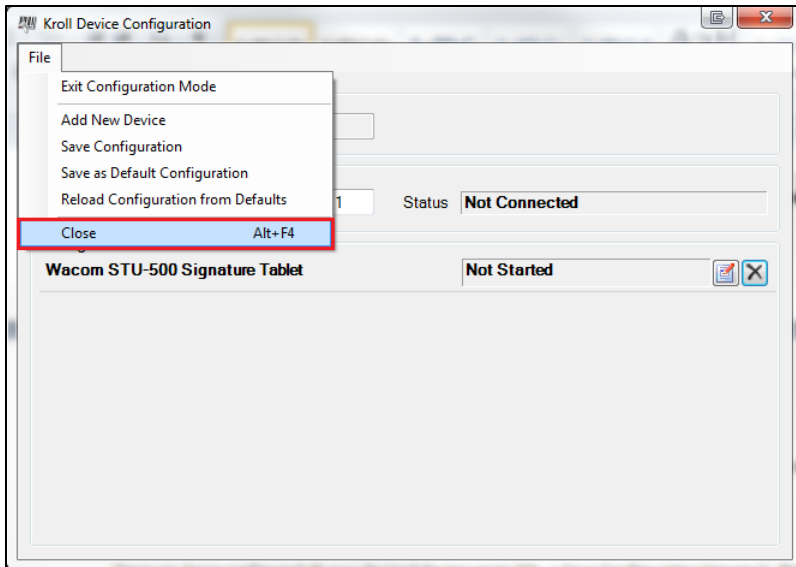
- When you are finished configuring your device, go to **File > Save Configuration**.



7. To exit **Configuration Mode**, go to **File > Exit Configuration Mode**.



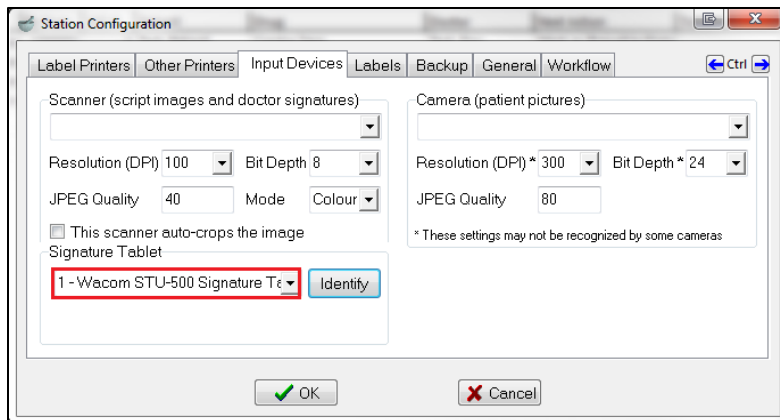
8. To exit the **Kroll Device Configuration** screen, go to **File > Close**.



- Ensure the electronic signature tablet is connected to your work station. Go to **File > Configuration > Work Station > This Work Station**. Select the **Input Devices** tab and select your electronic signature tablet from the **Signature Tablet** dropdown menu.

If your electronic signature tablet does not appear in the dropdown menu, click **Identify**. Your system will identify the electronic signature tablet and add it to the **Signature Tablet** dropdown menu.

When you have selected your electronic signature tablet from the dropdown menu, click **OK**.



NOTE: This step must be performed at each work station that will be connected to an electronic signature tablet.

Configuration – Customized Workflow

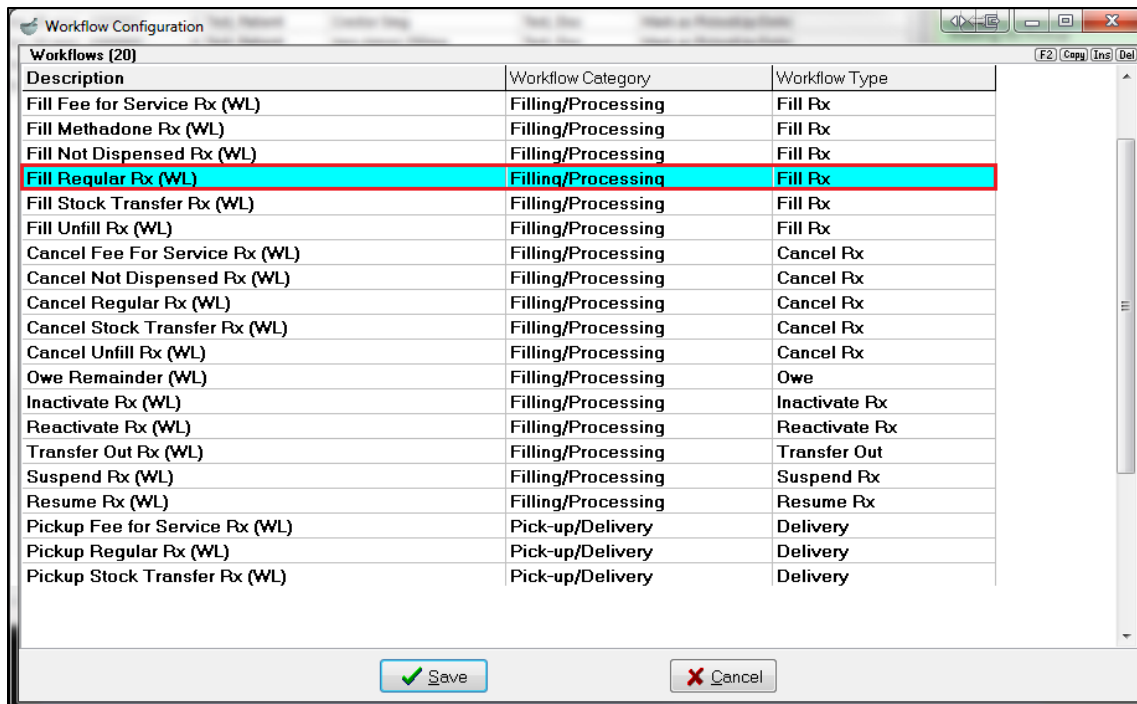
The following workflows and workflow actions can be configured to capture electronic signatures:

- Fill Regular Rx
 - Verify Data Entry
 - Package Rx
 - Verify Rx Packaging
 - Clinical Verification
 - Counseling (when available)
- Fill Methadone Rx (WL)
 - Verify Data Entry
 - Package Rx
 - Verify Rx Packaging
 - Clinical Verification
- Fill Not Dispensed
 - Verify Rx Packaging
- Fill Stock Transfer Rx
 - Verify Data Entry
 - Package Rx
 - Verify Rx Packaging
- Owe Remainder
 - Package Rx
 - Verify Rx Packaging

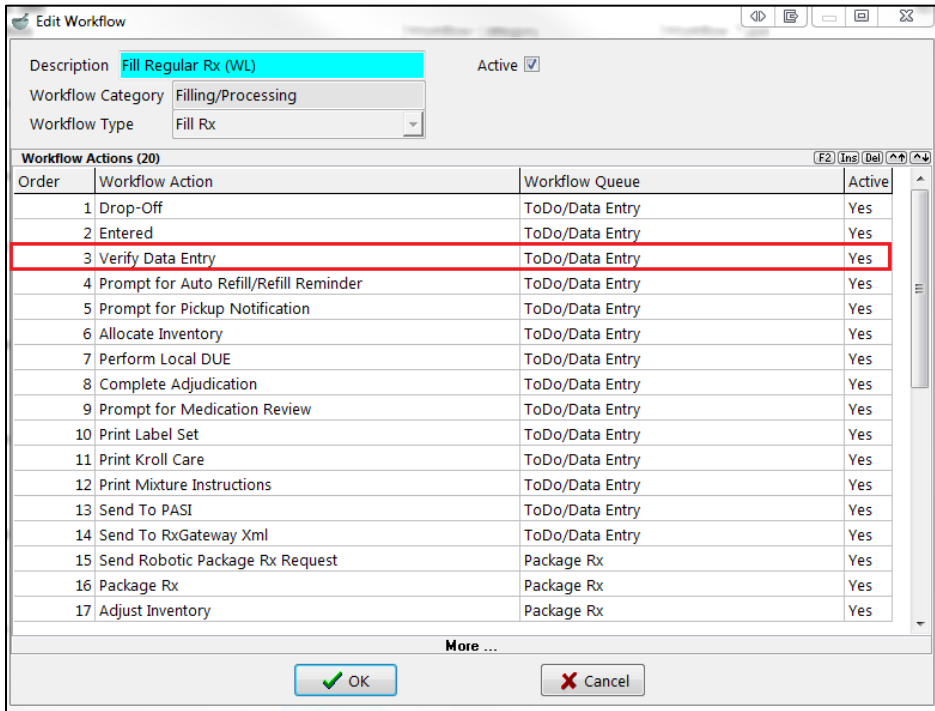
Customizing the Fill Regular Rx Workflow

The following section explains how to configure the **Fill Regular Rx** workflow to require electronic signature captures for each workflow action. Follow the same steps to configure other workflows to require electronic signature captures.

1. Go to **File > Configuration > Workflow > Edit Workflows**. The Workflow Configuration screen will appear. Double-click **Fill Regular Rx (WL)**.



- The **Edit Workflow** screen will appear. Double-click a **Workflow Action** to configure it to require an electronic signature capture.



Description: **Fill Regular Rx (WL)** Active

Workflow Category: Filling/Processing

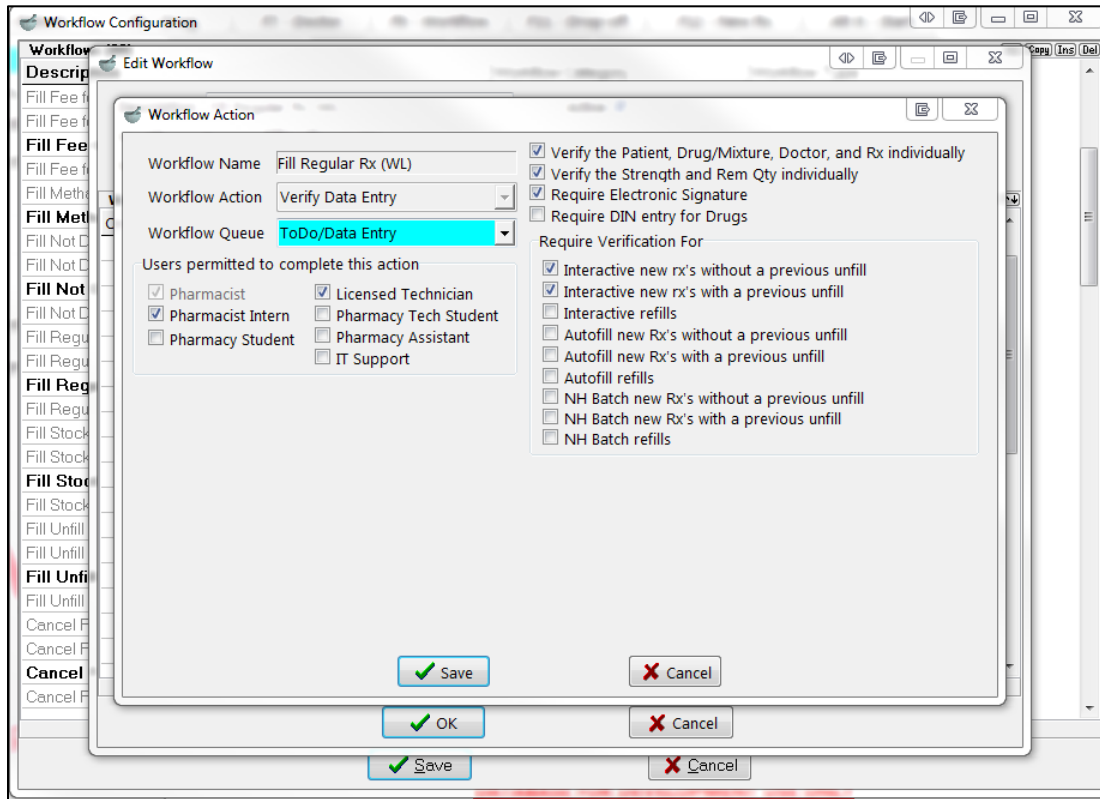
Workflow Type: Fill Rx

Order	Workflow Action	Workflow Queue	Active
1	Drop-Off	ToDo/Data Entry	Yes
2	Entered	ToDo/Data Entry	Yes
3	Verify Data Entry	ToDo/Data Entry	Yes
4	Prompt for Auto Refill/Refill Reminder	ToDo/Data Entry	Yes
5	Prompt for Pickup Notification	ToDo/Data Entry	Yes
6	Allocate Inventory	ToDo/Data Entry	Yes
7	Perform Local DUE	ToDo/Data Entry	Yes
8	Complete Adjudication	ToDo/Data Entry	Yes
9	Prompt for Medication Review	ToDo/Data Entry	Yes
10	Print Label Set	ToDo/Data Entry	Yes
11	Print Kroll Care	ToDo/Data Entry	Yes
12	Print Mixture Instructions	ToDo/Data Entry	Yes
13	Send To PASI	ToDo/Data Entry	Yes
14	Send To RxGateway Xml	ToDo/Data Entry	Yes
15	Send Robotic Package Rx Request	Package Rx	Yes
16	Package Rx	Package Rx	Yes
17	Adjust Inventory	Package Rx	Yes

More ...

Verify Data Entry

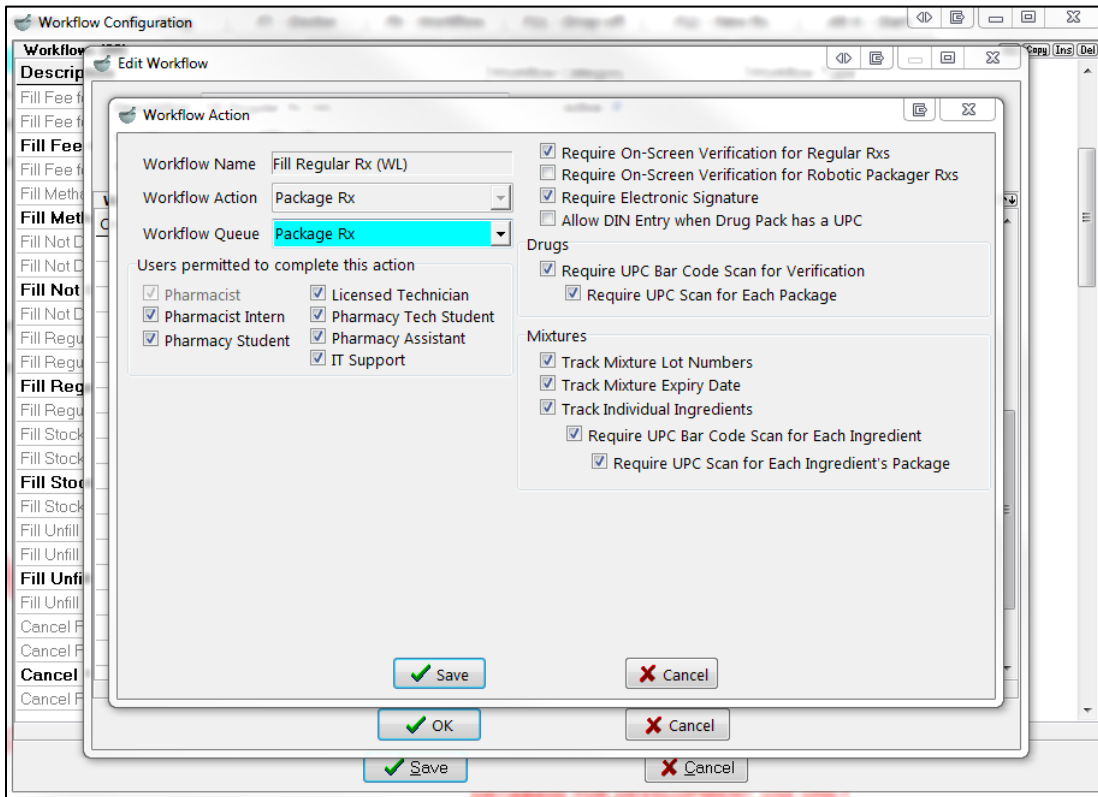
To configure the **Verify Data Entry** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



NOTE: It is especially important to ensure that the **Require Electronic Signature** option is enabled.

Package Rx

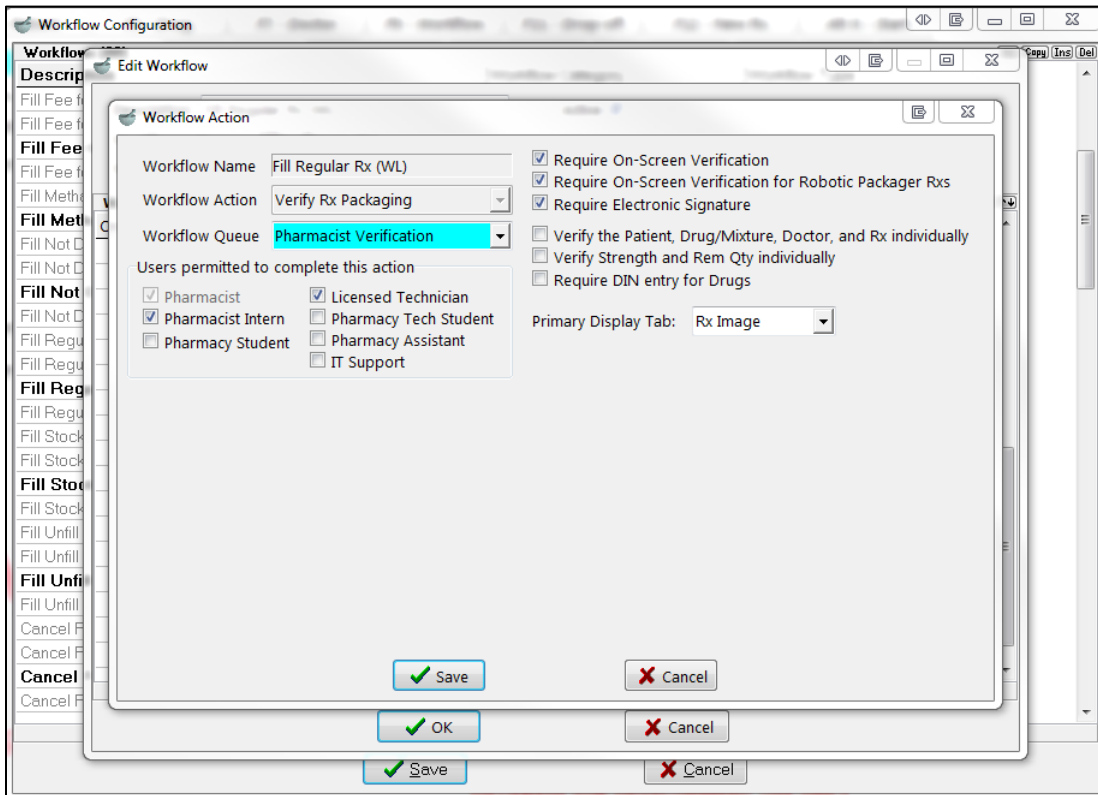
To configure the **Package Rx** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



NOTE: It is especially important to ensure that the **Require Electronic Signature** option is enabled.

Verify Rx Packaging

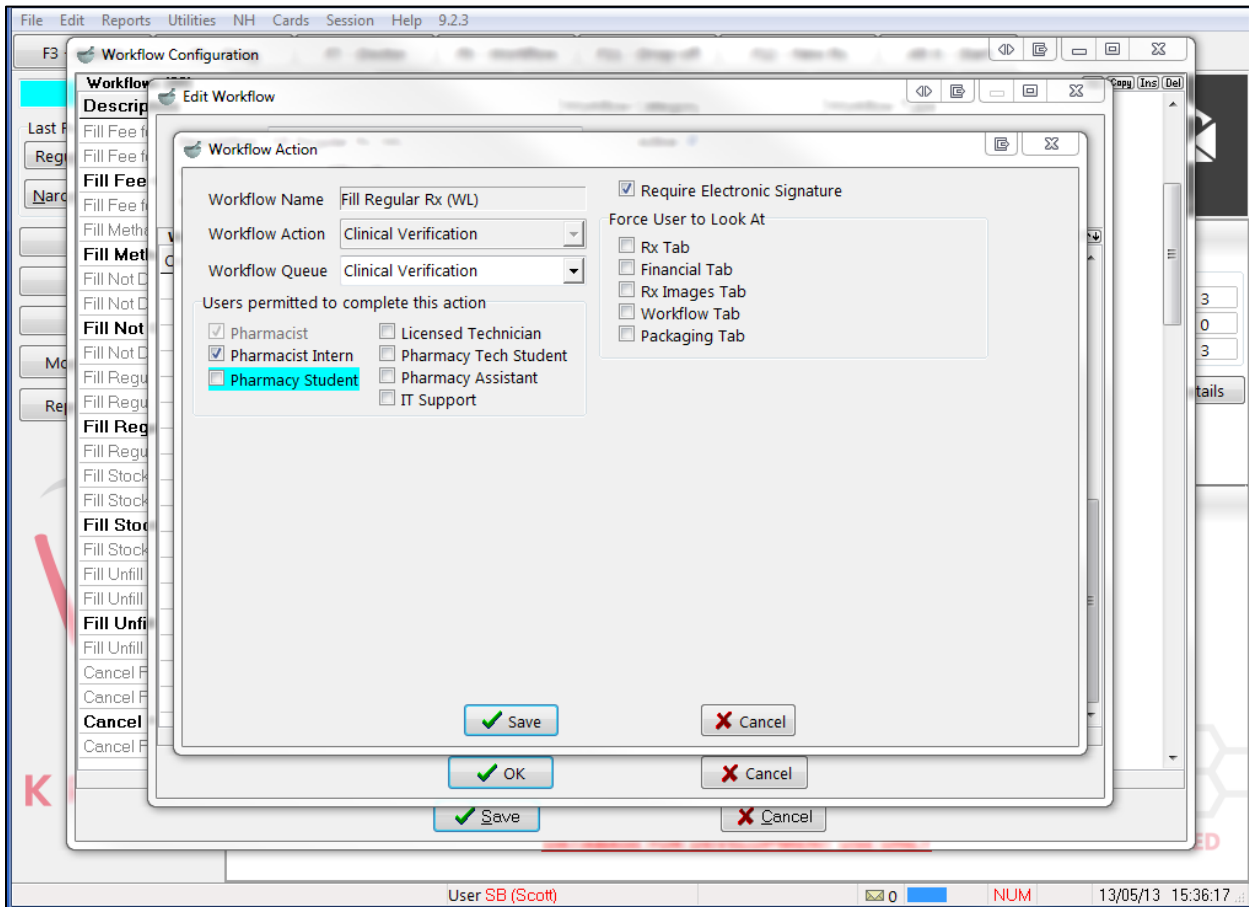
To configure the **Verify Rx Packaging** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



NOTE: It is especially important to ensure that the **Require Electronic Signature** option is enabled.

Clinical Verification

To configure the **Clinical Verification** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



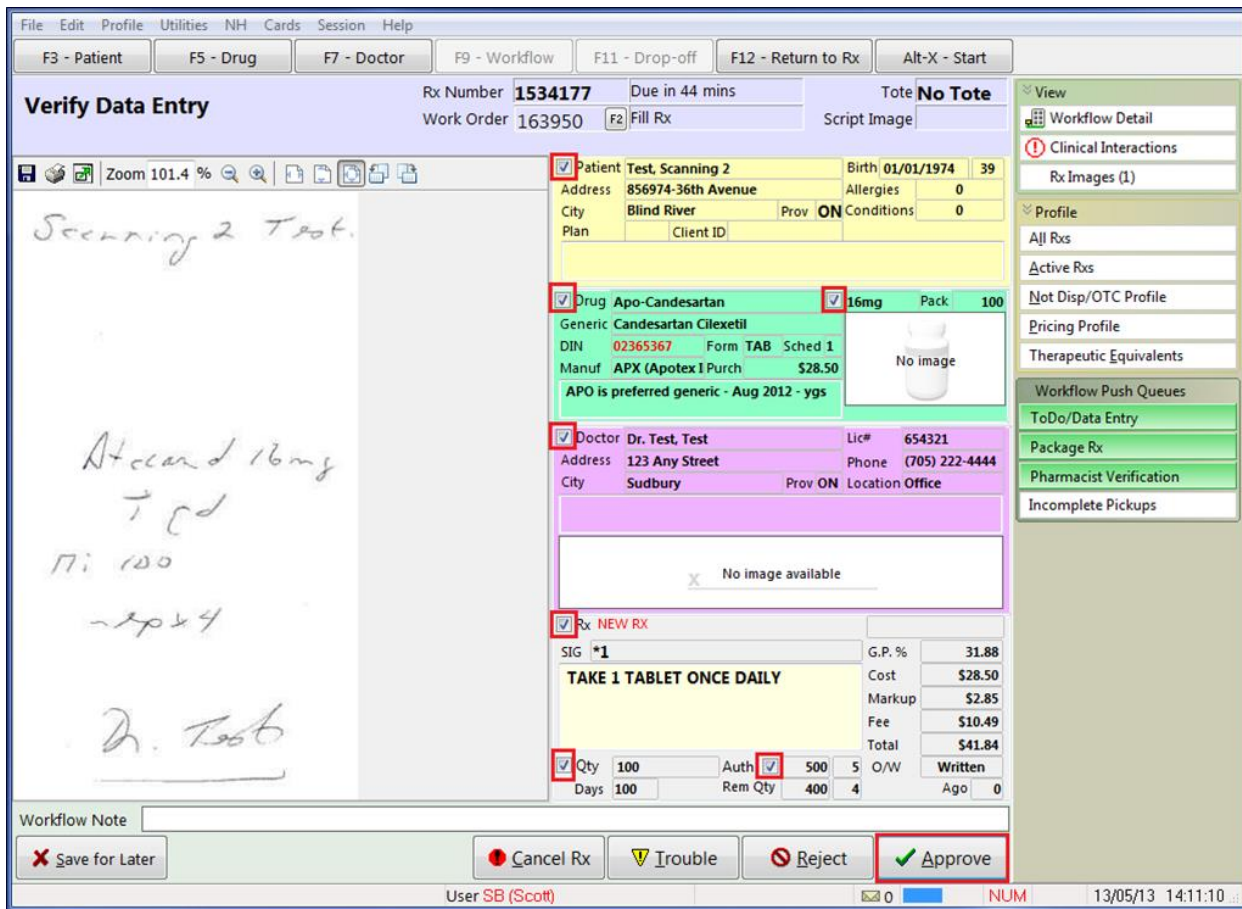
NOTE: It is especially important to ensure that the **Require Electronic Signature** option is enabled.

Capturing Electronic Signatures

This section explains how to use the electronic signature tablet to create electronic signature captures. Ensure your system has been configured to capture electronic signatures before you begin.

NOTE: The electronic signature tablet requires 125 points of reference to recognize and accept a signature. As such, full signatures are required. A signature of 'X', for example, would not be recognized by the electronic signature tablet.

1. Fill an Rx, completing all workflow steps up to the **Verify Data Entry** stage. Ensure all of the checkboxes on the **Verify Data Entry** screen are checked. Click **Approve** to prompt the signature pad.

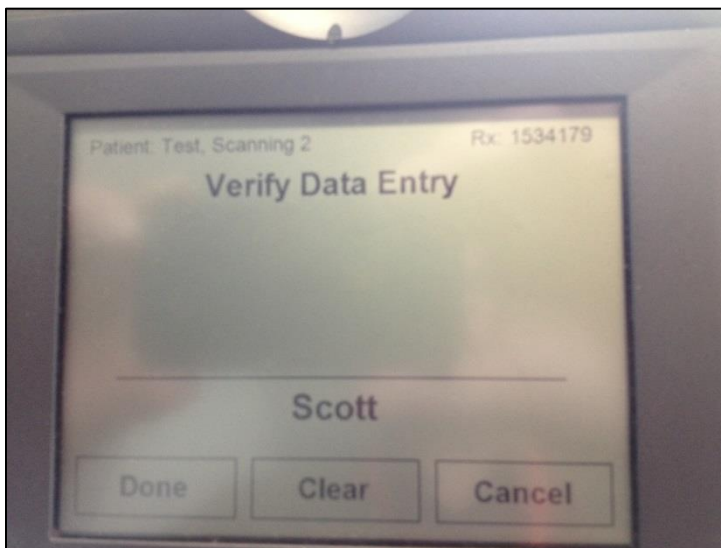


The screenshot displays the 'Verify Data Entry' screen in a medical software application. At the top, there are navigation tabs for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - Return to Rx', and 'Alt-X - Start'. The main header area shows 'Verify Data Entry' with fields for 'Rx Number 1534177', 'Due in 44 mins', 'Total No Tote', 'Work Order 163950', and 'F2 Fill Rx'. A toolbar includes icons for zooming and other functions. The central area is divided into sections for Patient, Drug, and Doctor, each with a checked checkbox. The Patient section includes name, address, birth date, and allergies. The Drug section shows 'Apo-Candesartan 16mg' with a pack size of 100. The Doctor section lists 'Dr. Test, Test' with license number 654321. Below these is a section for the Rx, showing 'NEW RX' with a strength of *1 and instructions 'TAKE 1 TABLET ONCE DAILY'. A price breakdown table is visible on the right side of the Rx section. At the bottom, there are buttons for 'Save for Later', 'Cancel Rx', 'Trouble', 'Reject', and 'Approve'. The 'Approve' button is highlighted with a red box. The status bar at the very bottom shows 'User SB (Scott)', 'NUM', and the date/time '13/05/13 14:11:10'.

2. The **Electronic Signature** screen will appear.

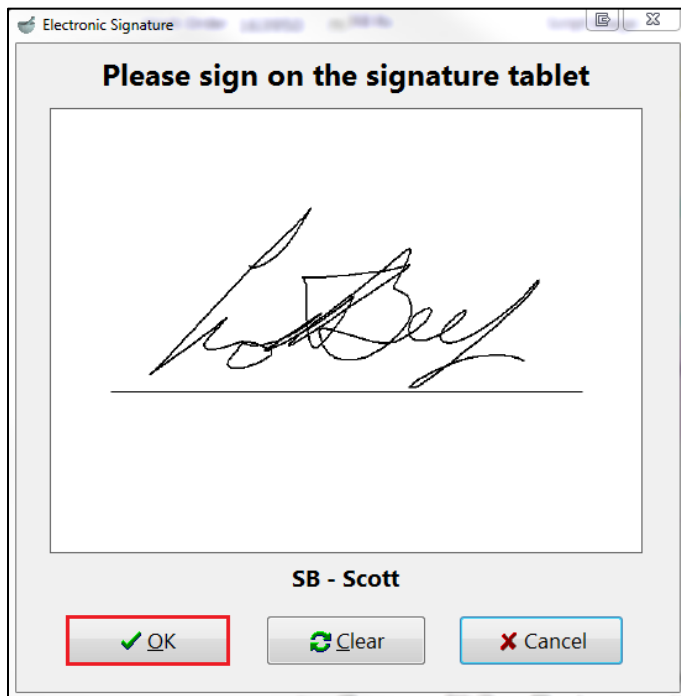


Have a pharmacist or verified user sign his or her name on the electronic signature tablet.



The signature will appear on the screen. When it has transmitted successfully, the **OK** button on your screen will activate, as well as the **Done** button on the electronic signature tablet. If the **OK** and **Done** buttons are not active, the signature did not transmit successfully. Click **Cancel** and retry.

When you are finished, click **OK**.



1. The **Packaging** screen will appear. When the necessary packaging steps are complete, the **Packaged** button will activate. Click **Packaged** to prompt the signature pad.


File Edit Profile Utilities NH Cards Session Help

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - Return to Rx Alt-X - Start

Package Rx Rx Number **1534177** Due in 42 mins Tote **No Tote**
 Work Order 163950 Fill Rx Script Image

Drug Information

Brand Name	Apo-Candesartan	Strength	16mg
Generic Name	Candesartan Cilexetil	DIN	02365367
Form	TAB (Tablet)	Schedule	1 (Schedule 1 [F])
Manufacturer	APX (Aptex Incorporated)	Description	Rnd Peach Biconvex Tab "16"
Location		Description 2	

No image available 

Total to Package Qty Packaged Labels

All Drug Packs have been packaged

Packaging Details 1 / 1

Pack Size 100	Qty to Package 100	Qty Packaged 100	On Hand 338	Inventory Used 100
Qty 100	UPC/DIN 771313219860		User SB	<input type="button" value="Edit"/> <input type="button" value="Del"/>

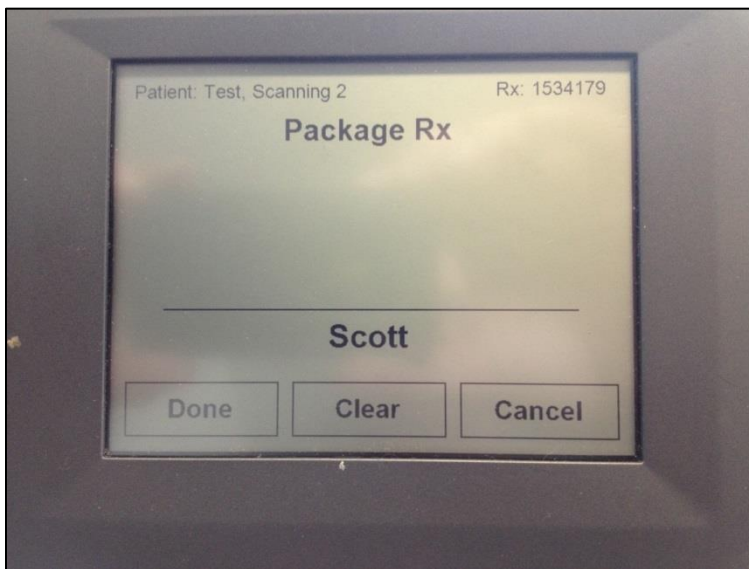
Workflow Note

User SB (Scott) 0 NUM 13/05/13 14:14:12

2. The **Electronic Signature** screen will appear.



Have a pharmacist or verified user sign his or her name on the electronic signature tablet.

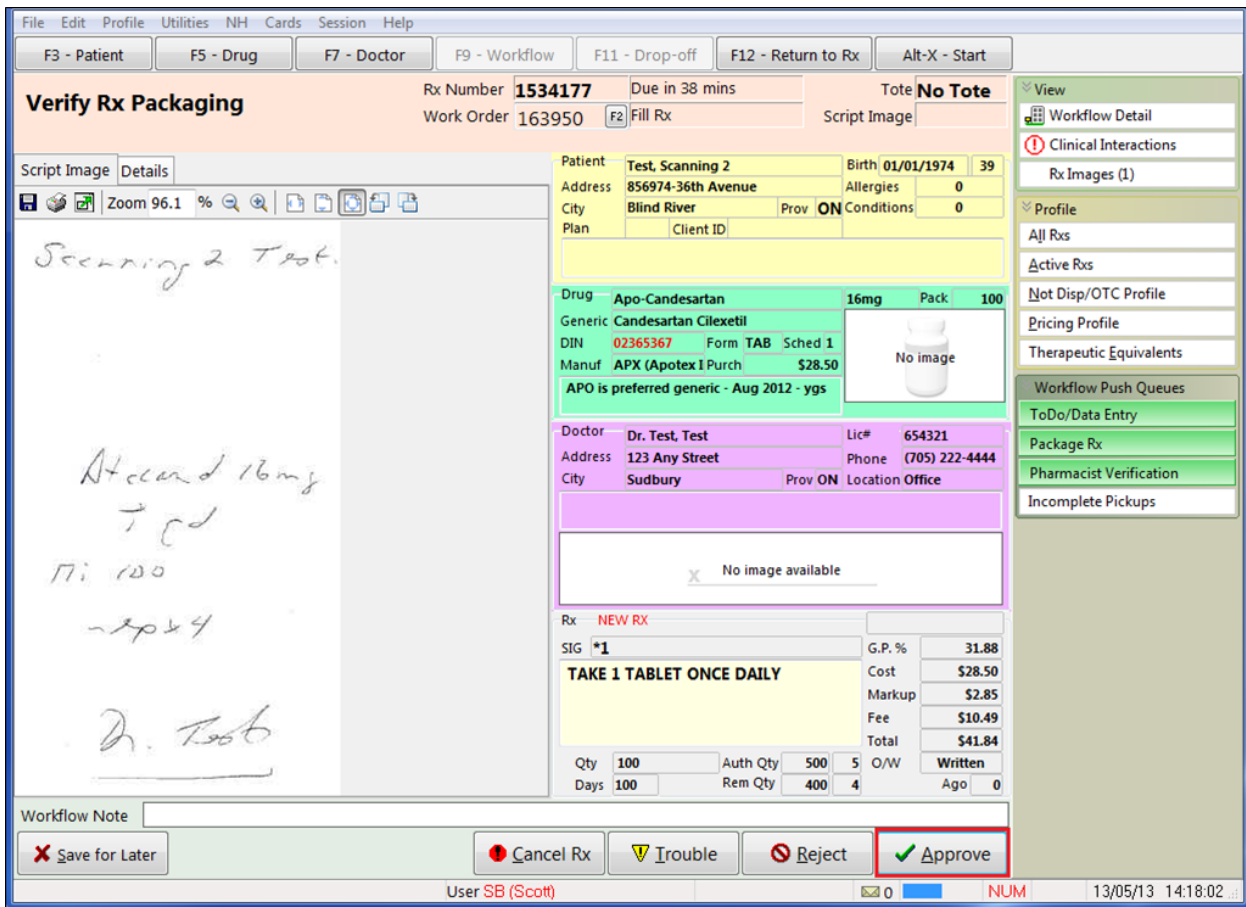


The signature will appear on the screen. When it has transmitted successfully, the **OK** button on your screen will activate, as well as the **Done** button on the electronic signature tablet. If the **OK** and **Done** buttons are not active, the signature did not transmit successfully. Click **Cancel** and retry.

When you are finished, click **OK**.



1. The **Verify Rx Packaging** screen will appear. Click **Approve** to prompt the signature pad.



Verify Rx Packaging

Rx Number: 1534177 Due in 38 mins Total: No Tote
 Work Order: 163950 F2 Fill Rx Script Image

Patient: Test, Scanning 2 Birth: 01/01/1974 39
 Address: 856974-36th Avenue Allergies: 0
 City: Blind River Prov: ON Conditions: 0
 Plan: Client ID

Drug: Apo-Candesartan 16mg Pack: 100
 Generic: Candesartan Cilexetil
 DIN: 02365367 Form: TAB Sched: 1
 Manuf: APX (Apotex I Purch) \$28.50
 APO is preferred generic - Aug 2012 - ygs

Doctor: Dr. Test, Test Lic#: 654321
 Address: 123 Any Street Phone: (705) 222-4444
 City: Sudbury Prov: ON Location: Office

Rx: NEW RX
 SIG: *1 G.P. %: 31.88
TAKE 1 TABLET ONCE DAILY
 Cost: \$28.50
 Markup: \$2.85
 Fee: \$10.49
 Total: \$41.84
 Qty: 100 Auth Qty: 500 5 O/W: Written
 Days: 100 Rem Qty: 400 4 Ago: 0

Workflow Note

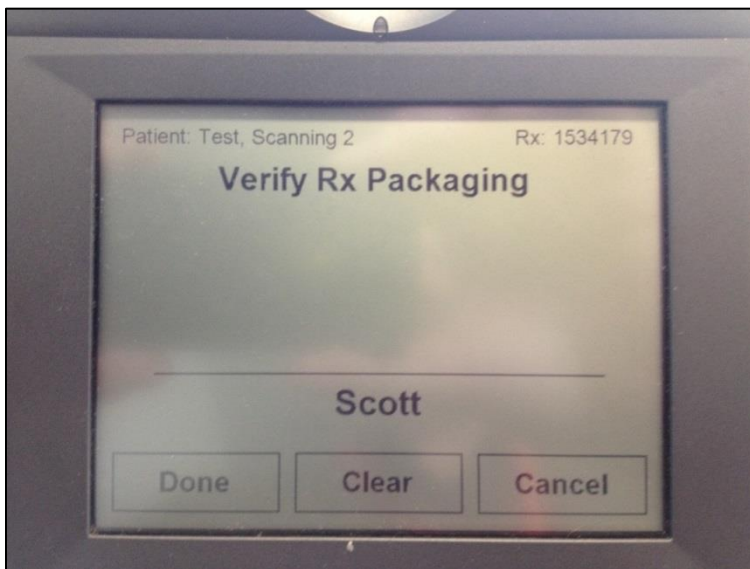
Buttons:

User: SB (Scott) NUM 13/05/13 14:18:02

The **Electronic Signature** screen will appear.



Have a pharmacist or verified user sign his or her name on the electronic signature tablet.



The signature will appear on the screen. When it has transmitted successfully, the **OK** button on your screen will activate, as well as the **Done** button on the electronic signature tablet. If the **OK** and **Done** buttons are not active, the signature did not transmit successfully. Click **Cancel** and retry.

When you are finished, click **OK**.



1. The **Clinical Verification** screen will appear. Click **Approve** to prompt the signature pad.

File Edit Profile Utilities NH Cards Session Help

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - Return to Rx Alt-X - Start

Clinical Verification

Rx Number **1534177** Due in 29 mins Total **No Total**
 Work Order **163950** F2 Fill Rx Script Image

Clinical Verify Rx Financial Rx Images (1) Workflow Packaging

Patient Test, Scanning 2 Birth 01/01/1974 39	Brand Apo-Candesartan 16mg	Doctor Dr. Test, Test Doctor (Physici
Height <input type="text"/> Weight <input type="text"/> Gender Female	Generic Candesartan Cilexe DIN 02365367	Lic # 654321 Ref ID 01 Family Medicin
Family MD <input type="text"/>	Pack 100 Form TAB Schedule 1	Loc Office Ph (705) 222-4444
Allergies <input type="text"/>	APO is preferred generic - Aug 2012 - ygs	
Conditions <input type="text"/>	TAKE 1 TABLET ONCE DAILY	
	Qty 100 Auth Qty 500 5	
	Days Supply 100 Rem Qty 400 4	
	O/W Written Ago 0	

Interactions

Rx Messages

NEW RX

#	Status	Rx Num	Date	Brand Name	Sig	Qty	Auth	Rem	Due	Ago	Doctor
1		1534177	13/05/2013	Apo-Candesartan 16mg	*1	100	500	400	100	0	Test, Tes
2		1534176	13/05/2013	Apo-Rosuvastatin 40mg	*1	100	300	200	100	0	Test, Tes
3		1534167	02/05/2013	Cortate Cream 1%	UD	30	30	0	19	11	Test, Tes
4		1534157	01/05/2013	Apo-Metformin 500mg	*4	120	120	0	18	12	Test, Tes
5		1534156	01/05/2013	Alupent 2mg/ml	T 1 TSP TID PRN	150	150	0	-2	12	Test, Tes

Workflow Note

User **SB (Scott)** 0 NUM 13/05/13 14:26:00

The **Electronic Signature** screen will appear.

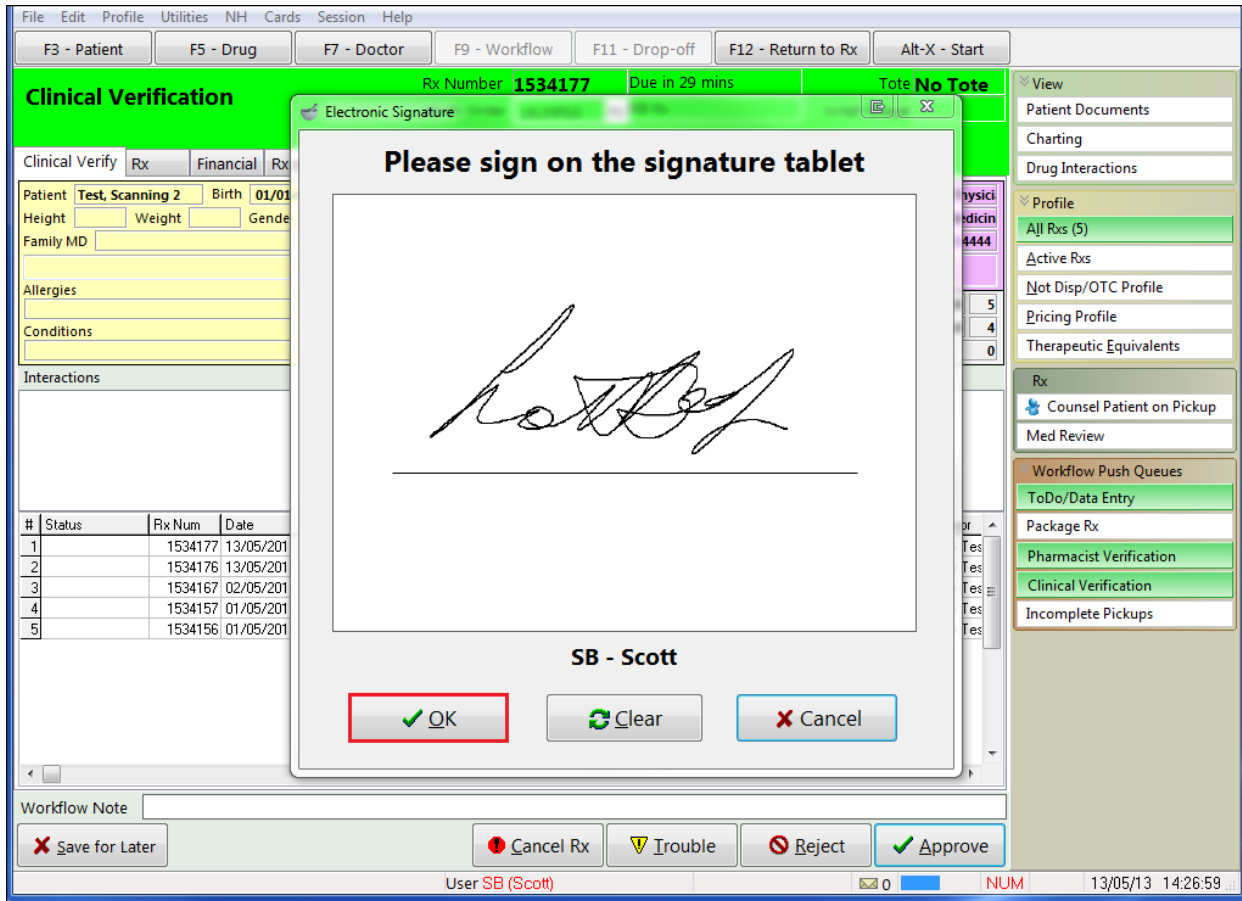


Have a pharmacist or verified user sign his or her name on the electronic signature tablet.



The signature will appear on the screen. When it has transmitted successfully, the **OK** button on your screen will activate, as well as the **Done** button on the electronic signature tablet. If the **OK** and **Done** buttons are not active, the signature did not transmit successfully. Click **Cancel** and retry.

When you are finished, click **OK**.



The screenshot shows a software interface for clinical verification. A central window titled "Please sign on the signature tablet" displays a handwritten signature. Below the signature, the name "SB - Scott" is visible. At the bottom of this window are three buttons: "OK" (highlighted with a red box), "Clear", and "Cancel".

The background interface includes a menu bar (File, Edit, Profile, Utilities, NH, Cards, Session, Help) and a toolbar with function keys (F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Return to Rx, Alt-X - Start). The main area is titled "Clinical Verification" and shows patient information for "Test, Scanning 2" (Birth: 01/01). A table lists five prescriptions with their status, numbers, and dates.

#	Status	Rx Num	Date
1		1534177	13/05/201
2		1534176	13/05/201
3		1534167	02/05/201
4		1534157	01/05/201
5		1534156	01/05/201

At the bottom of the interface, there is a "Workflow Note" section with buttons for "Save for Later", "Cancel Rx", "Trouble", "Reject", and "Approve". The status bar at the very bottom shows "User SB (Scott)", a notification icon, and the date/time "13/05/13 14:26:59".

Viewing Electronic Signatures

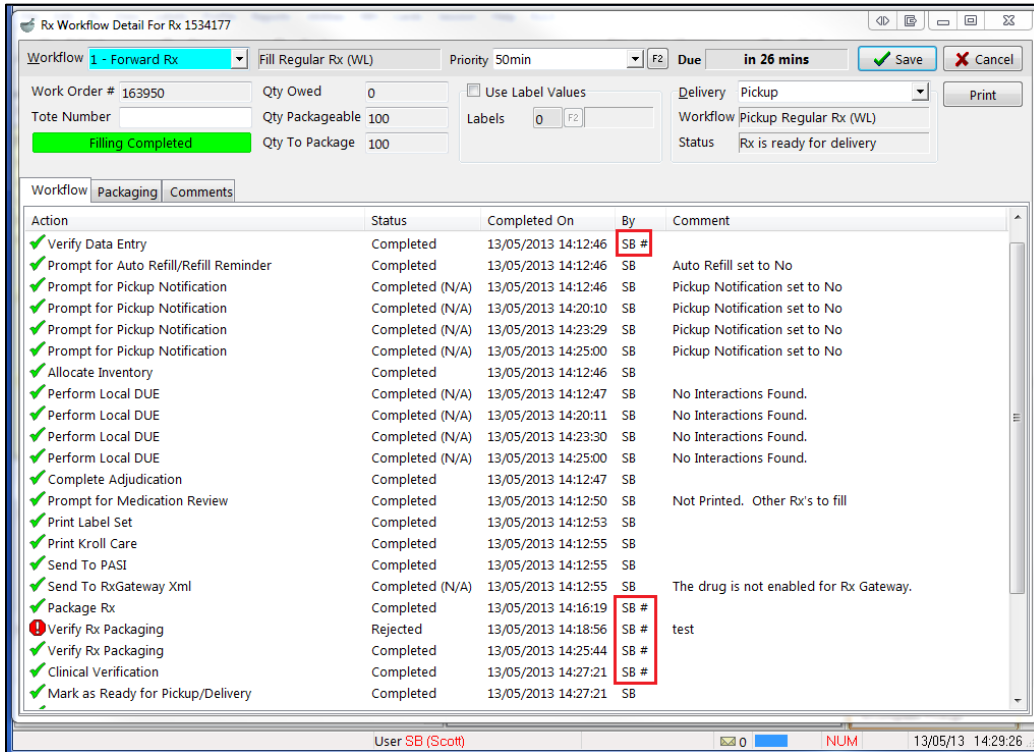
This section explains how to view an electronic signature capture that has been added to an Rx.

1. From the **F12 – Fill Rx** screen, select **View > Workflow Detail**, or select **View Workflow Detail** from the right navigation pane.

The screenshot displays the '1-Modify Rx for Smith, John' window. The 'View' menu is open, with 'Workflow Detail' highlighted. The right-hand navigation pane also has 'View Workflow Detail' highlighted. The main interface shows patient information for John Smith, a prescription for 'Eprobamate/Codiene Phos PPI (Penicillamine)', and a list of workflow actions. A message box at the bottom indicates that a compliance label and delivery label will be printed.

Action	Status
Add Rx Image	Available
Transfer Rx From Another ...	Available
Transfer Rx To Another Sto...	Available
Inactivate Rx	Available
Cancel Rx	Available
Call Doctor	Available
Counsel Patient on Pickup	Available
Owe Quantity	Available
View	Expanded
Clinical Interactions	Available
Plan Information	Available
Refill Information	Available
Patient Plan Information	Available
Generic Equivalents	Available
Rx as it was Filled	Available
Patient Encounters	Available
Unit Dose Info	Available
Work Order	Available
Rx Counseling History	Available
Workflow	Expanded
Send Rx to Trouble	Available
View Workflow Detail	Highlighted
Workflow Push Queues	Available
ToDo/Data Entry	Available
Package Rx	Available

- The **Rx Workflow Detail** screen will appear. The number sign (#) indicates that the workflow action has an electronic signature capture attached to it. Double-click a workflow action to view its electronic signature capture.



Rx Workflow Detail For Rx 1534177

Workflow: **1 - Forward Rx** | Fill Regular Rx (WL) | Priority: 50min | Due: **in 26 mins** | Save | Cancel

Work Order #: 163950 | Qty Owed: 0 | Use Label Values: | Delivery: Pickup | Print

Tote Number: | Qty Packageable: 100 | Labels: 0 | F2 | Workflow: Pickup Regular Rx (WL) | Status: Rx is ready for delivery

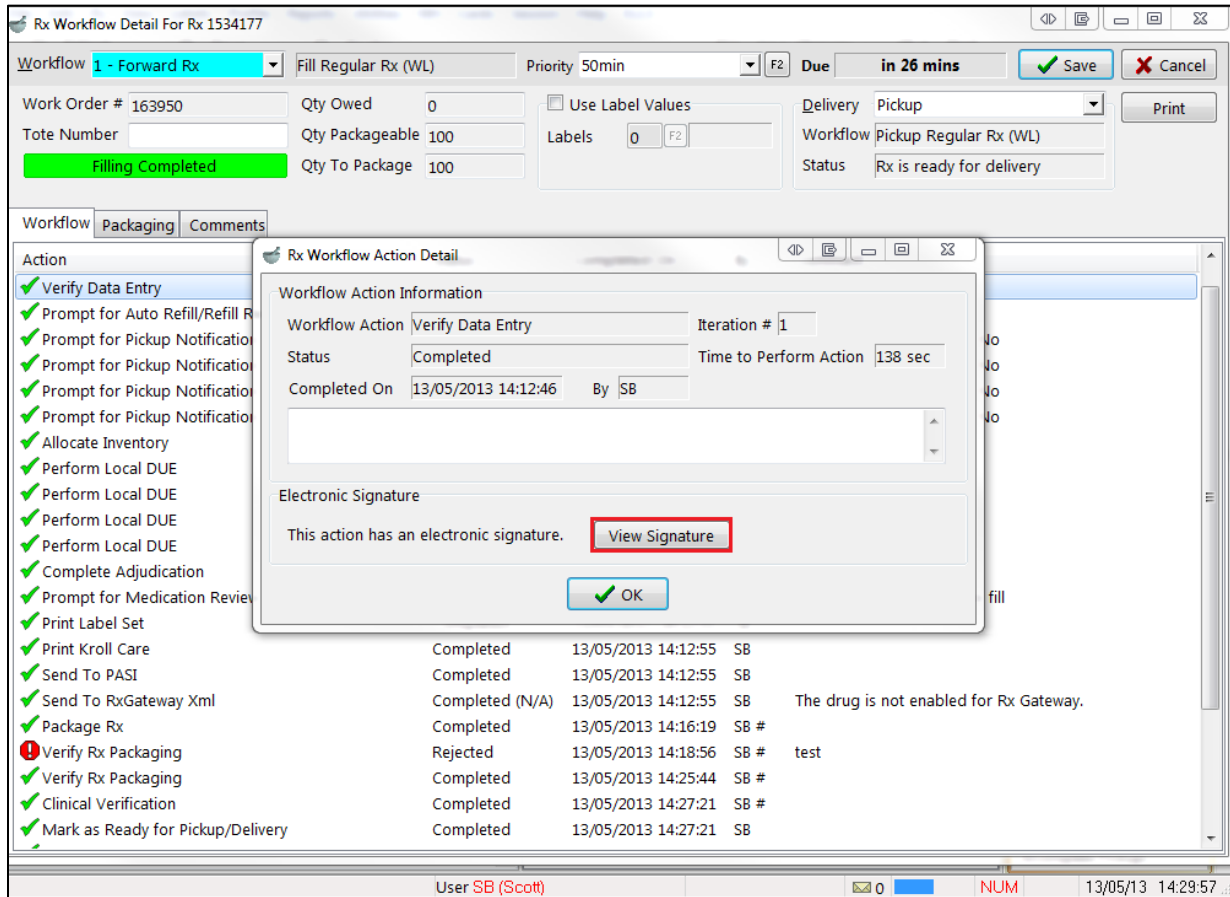
Qty To Package: 100

Workflow: Packaging | Comments

Action	Status	Completed On	By	Comment
✓ Verify Data Entry	Completed	13/05/2013 14:12:46	SB #	
✓ Prompt for Auto Refill/Refill Reminder	Completed	13/05/2013 14:12:46	SB	Auto Refill set to No
✓ Prompt for Pickup Notification	Completed (N/A)	13/05/2013 14:12:46	SB	Pickup Notification set to No
✓ Prompt for Pickup Notification	Completed (N/A)	13/05/2013 14:20:10	SB	Pickup Notification set to No
✓ Prompt for Pickup Notification	Completed (N/A)	13/05/2013 14:23:29	SB	Pickup Notification set to No
✓ Prompt for Pickup Notification	Completed (N/A)	13/05/2013 14:25:00	SB	Pickup Notification set to No
✓ Allocate Inventory	Completed	13/05/2013 14:12:46	SB	
✓ Perform Local DUE	Completed (N/A)	13/05/2013 14:12:47	SB	No Interactions Found.
✓ Perform Local DUE	Completed (N/A)	13/05/2013 14:20:11	SB	No Interactions Found.
✓ Perform Local DUE	Completed (N/A)	13/05/2013 14:23:30	SB	No Interactions Found.
✓ Perform Local DUE	Completed (N/A)	13/05/2013 14:25:00	SB	No Interactions Found.
✓ Complete Adjudication	Completed	13/05/2013 14:12:47	SB	
✓ Prompt for Medication Review	Completed	13/05/2013 14:12:50	SB	Not Printed. Other Rx's to fill
✓ Print Label Set	Completed	13/05/2013 14:12:53	SB	
✓ Print Kroll Care	Completed	13/05/2013 14:12:55	SB	
✓ Send To PASI	Completed	13/05/2013 14:12:55	SB	
✓ Send To RxGateway Xml	Completed (N/A)	13/05/2013 14:12:55	SB	The drug is not enabled for Rx Gateway.
✓ Package Rx	Completed	13/05/2013 14:16:19	SB #	
✗ Verify Rx Packaging	Rejected	13/05/2013 14:18:56	SB #	test
✓ Verify Rx Packaging	Completed	13/05/2013 14:25:44	SB #	
✓ Clinical Verification	Completed	13/05/2013 14:27:21	SB #	
✓ Mark as Ready for Pickup/Delivery	Completed	13/05/2013 14:27:21	SB	

User: SB (Scott) | NUM | 13/05/13 14:29:26

- The **Workflow Action Detail** screen will appear. Click **View Signature** to view the electronic signature capture.



Rx Workflow Detail For Rx 1534177

Workflow: **1 - Forward Rx** | Fill Regular Rx (WL) | Priority: 50min | Due: **in 26 mins** | Save | Cancel

Work Order #: 163950 | Qty Owed: 0 | Use Label Values: | Delivery: Pickup | Print

Tote Number: | Qty Packageable: 100 | Labels: 0 | F2 | Workflow: Pickup Regular Rx (WL)

Filling Completed | Qty To Package: 100 | Status: Rx is ready for delivery

Rx Workflow Action Detail

Workflow Action Information

Workflow Action: Verify Data Entry | Iteration #: 1

Status: Completed | Time to Perform Action: 138 sec

Completed On: 13/05/2013 14:12:46 | By: SB

Electronic Signature

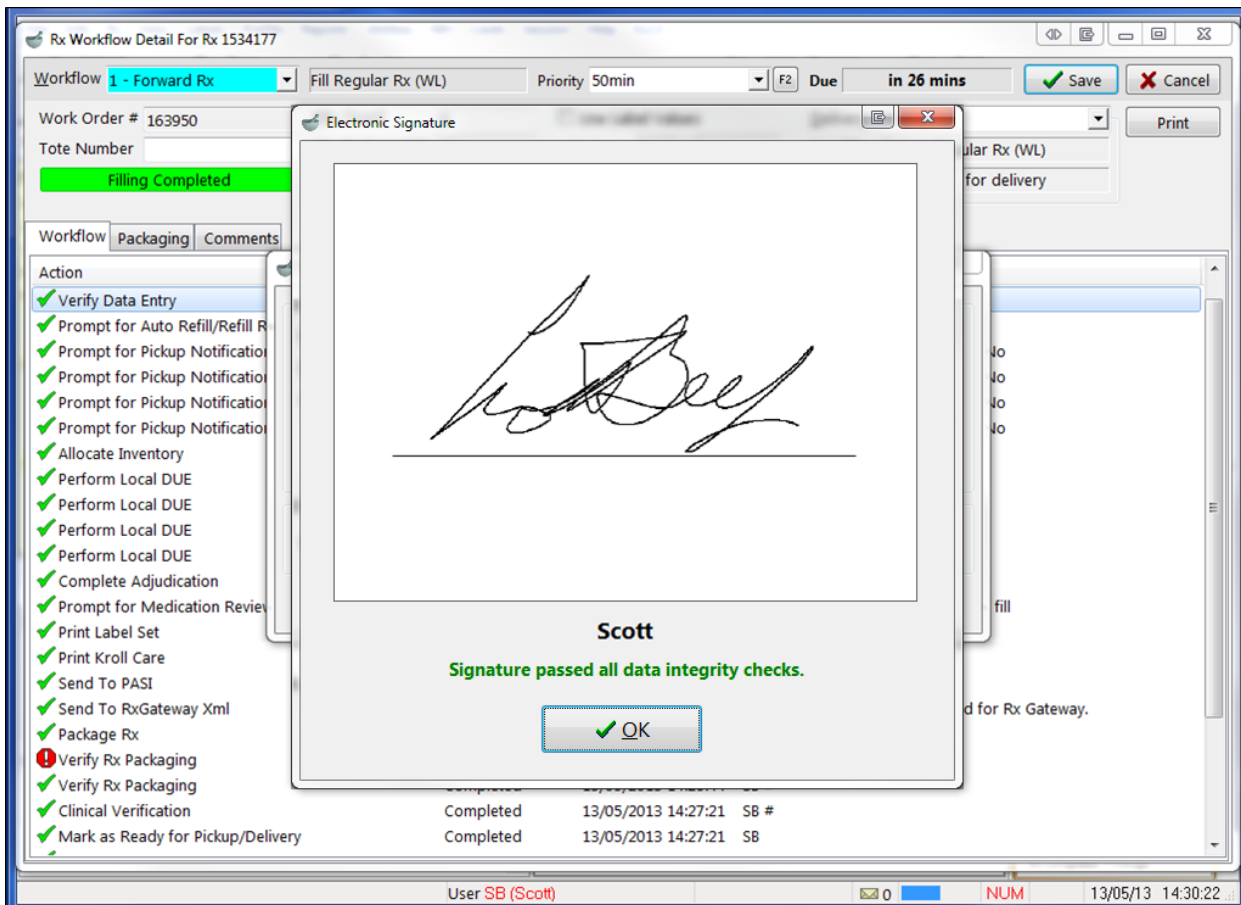
This action has an electronic signature. **View Signature**

OK

Print Label Set	Completed	13/05/2013 14:12:55	SB	
Print Kroll Care	Completed	13/05/2013 14:12:55	SB	
Send To PASI	Completed	13/05/2013 14:12:55	SB	
Send To RxGateway Xml	Completed (N/A)	13/05/2013 14:12:55	SB	The drug is not enabled for Rx Gateway.
Package Rx	Completed	13/05/2013 14:16:19	SB #	
Verify Rx Packaging	Rejected	13/05/2013 14:18:56	SB #	test
Verify Rx Packaging	Completed	13/05/2013 14:25:44	SB #	
Clinical Verification	Completed	13/05/2013 14:27:21	SB #	
Mark as Ready for Pickup/Delivery	Completed	13/05/2013 14:27:21	SB	

User: SB (Scott) | NUM | 13/05/13 14:29:57

The electronic signature capture will display. Click **OK** to exit.



Rx Workflow Detail For Rx 1534177

Workflow: **1 - Forward Rx** | Fill Regular Rx (WL) | Priority 50min | Due in 26 mins | Save | Cancel

Work Order #: 163950 | Tote Number: [] | Filling Completed

Electronic Signature

Signature: *Scott*

Scott
Signature passed all data integrity checks.

OK

Completed 13/05/2013 14:27:21 SB #
Completed 13/05/2013 14:27:21 SB

User SB (Scott) | NUM | 13/05/13 14:30:22