Electronic Signature Capture

User Guide

TELUS Health

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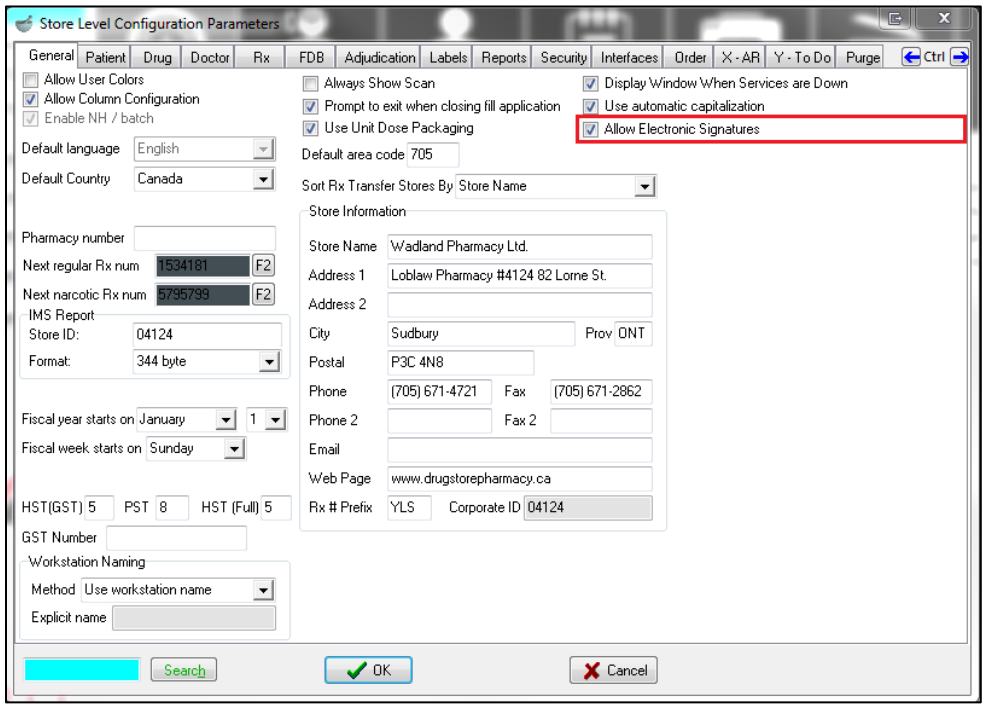
Electronic Signature Capture

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.

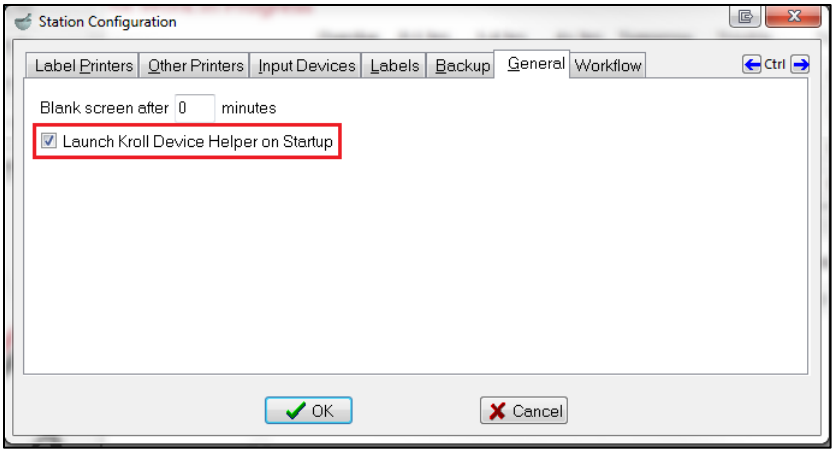


NOTE: This step only needs to be performed at one work station.

Configuration – Work Station

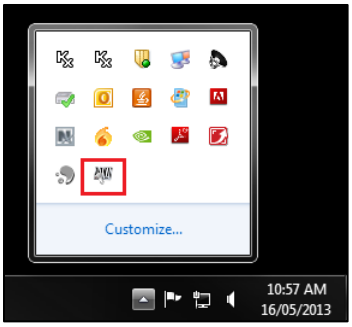
The following Work Station configuration settings must be in place before you use the electronic signature tablet.

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**.

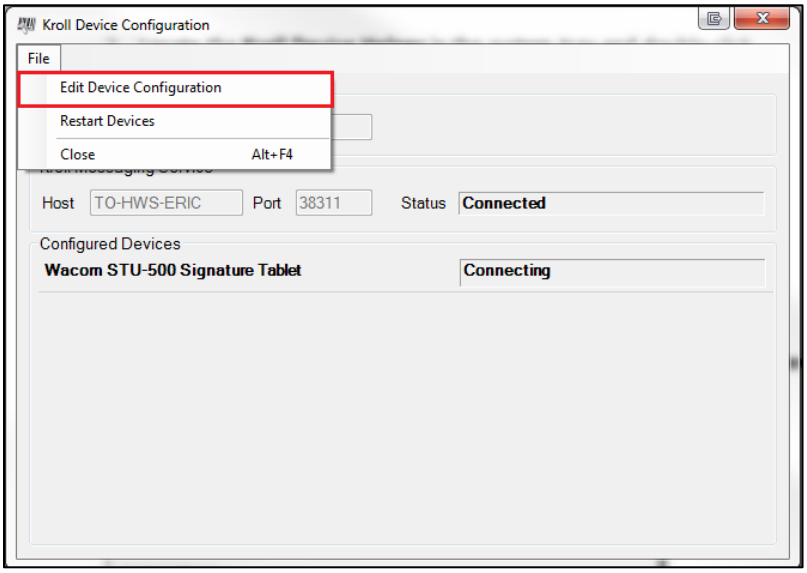


NOTE: If you manually checked this configuration option, you must exit and log back into Kroll to retain the configuration change. Do not make any additional configuration changes before you exit and log back in to Kroll.

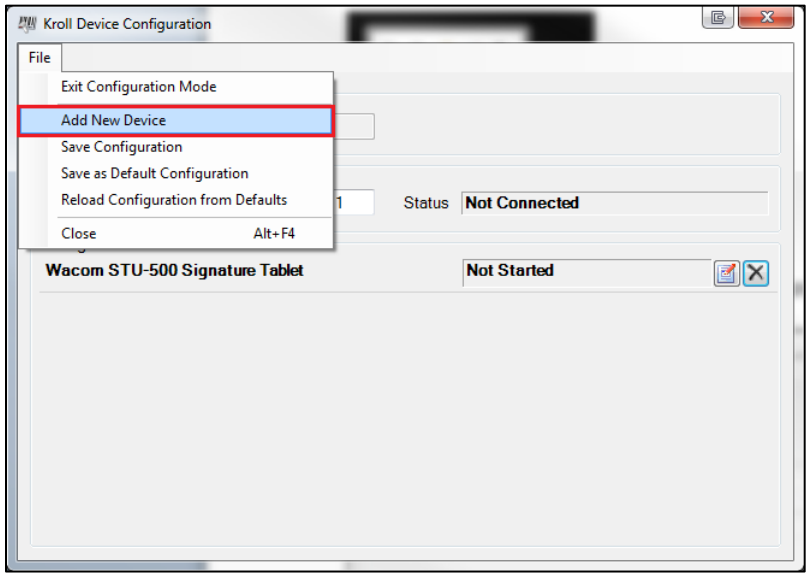
1. Locate the **Kroll Device Helper** in the system tray and double-click the **Kroll Device Helper** icon.



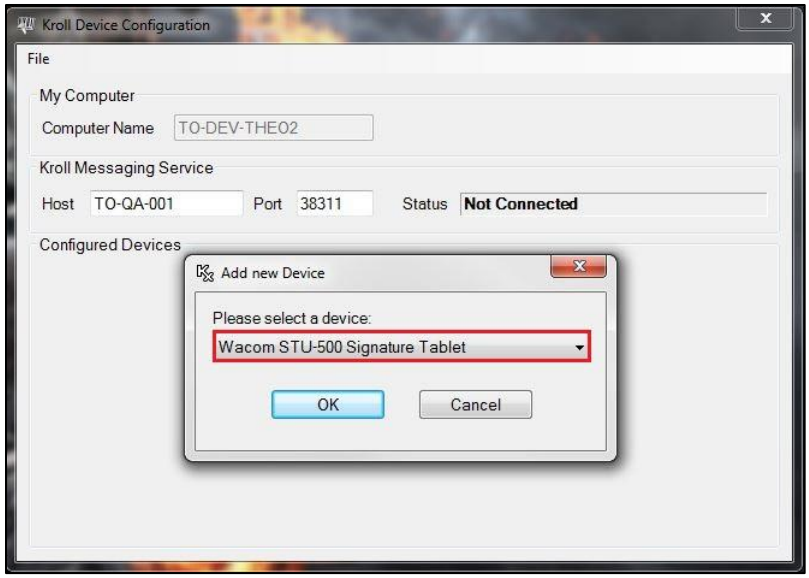
2. The **Kroll Device Configuration** screen will appear. Select **File** > **Edit Device Configuration**.



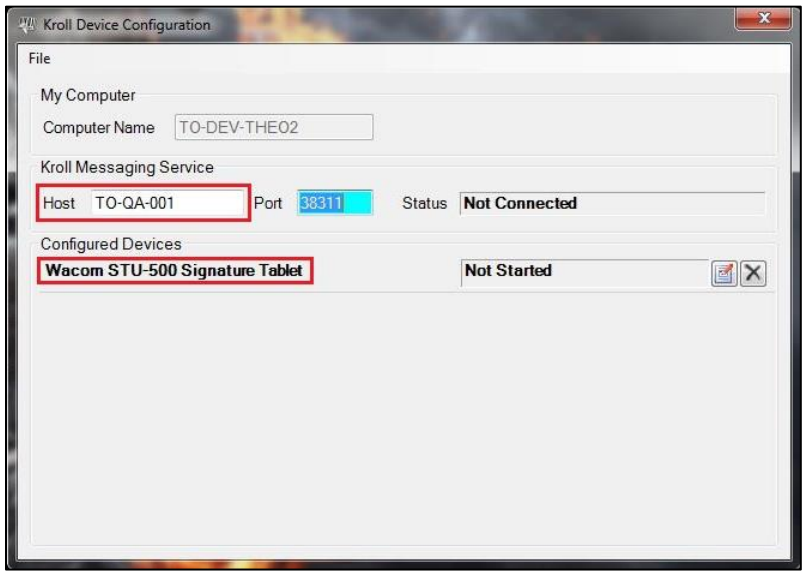
3. Select **File** > **Add New Device**.



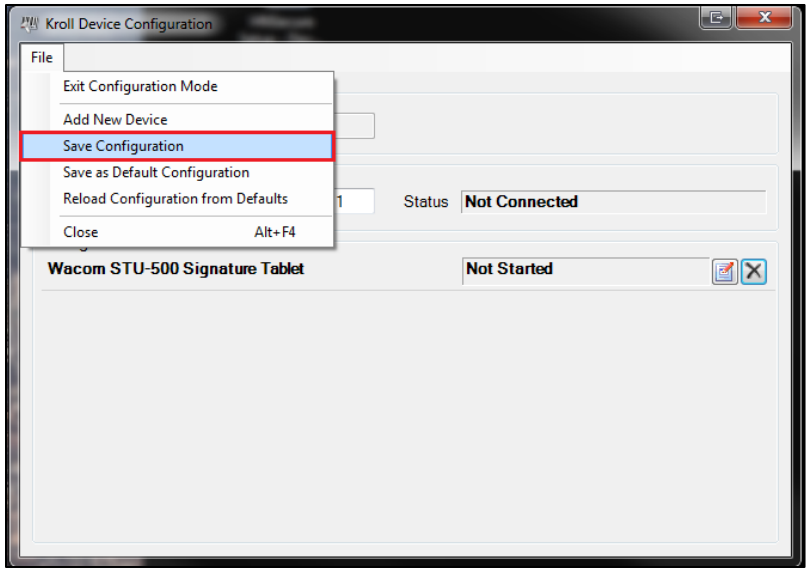
4. The **Add new Device** window will appear. Select your electronic signature tablet from the dropdown menu and click **OK**.



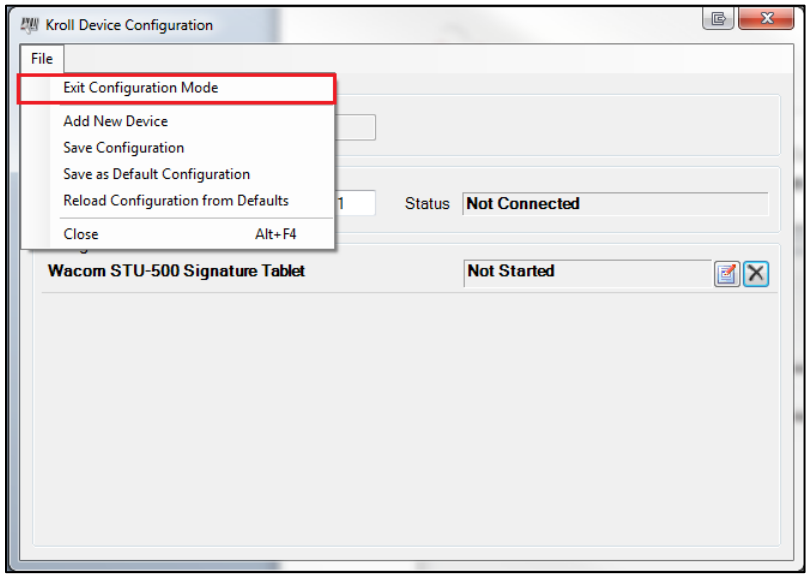
5. The electronic signature tablet will be listed under **Configured Devices** in the **Kroll Device Configuration** screen. Ensure the **Kroll Messaging System** is configured for the correct host (the server name where the service is installed).



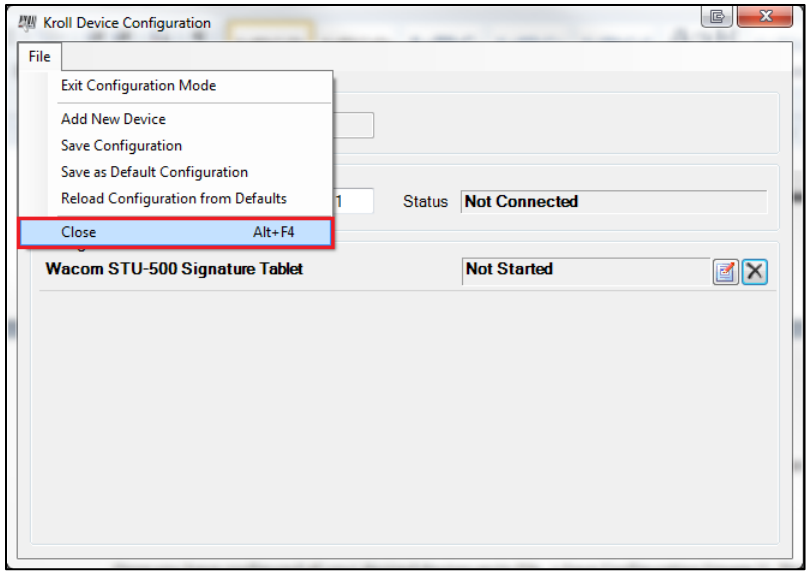
6. When you are finished configuring your device, go to **File** > **Save Configuration**.



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



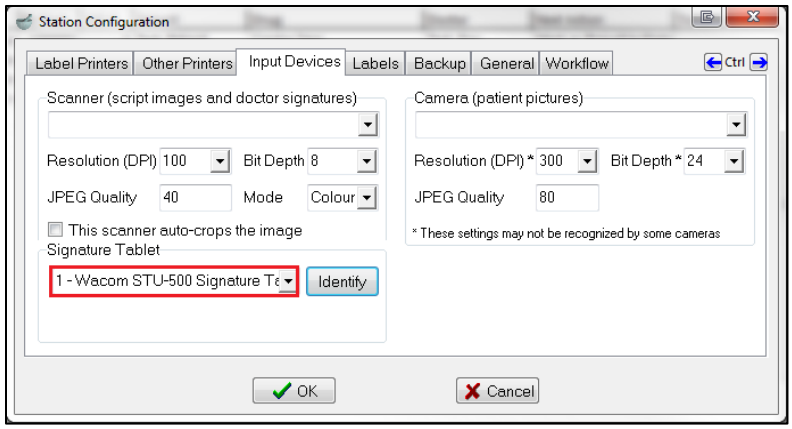
8. To exit the **Kroll Device Configuration** screen, go to **File** > **Close**.



9. 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

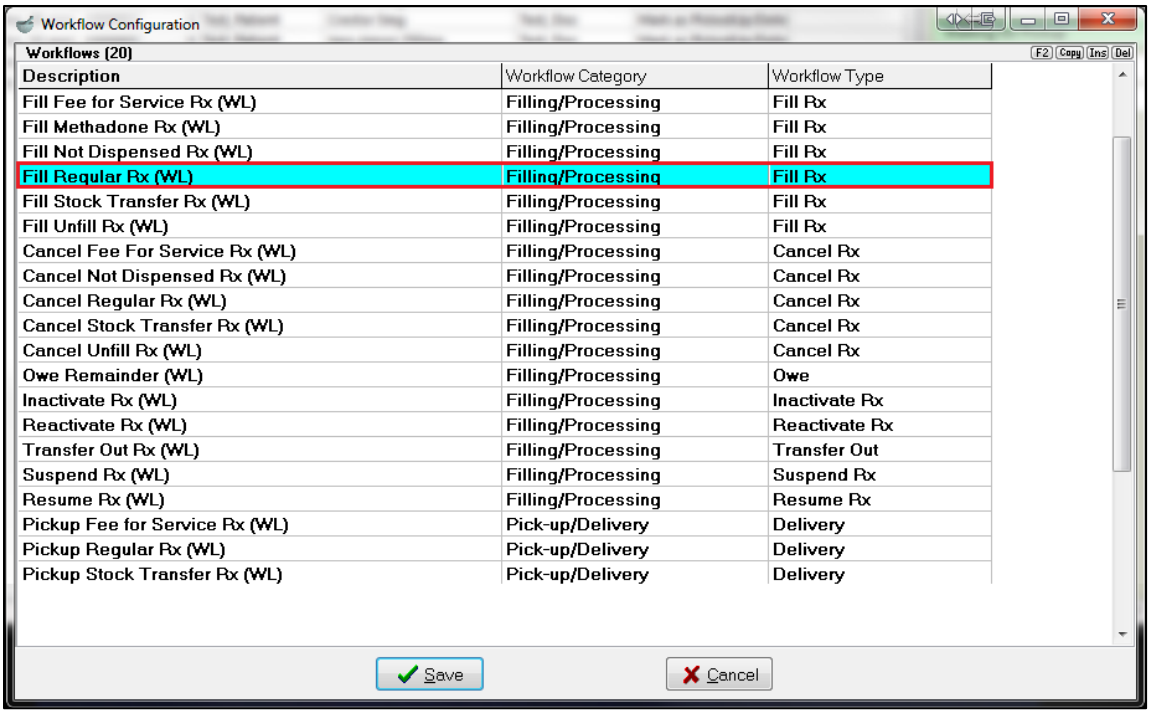
The following workflows and workflow actions can be configured to capture electronic signatures:

- 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

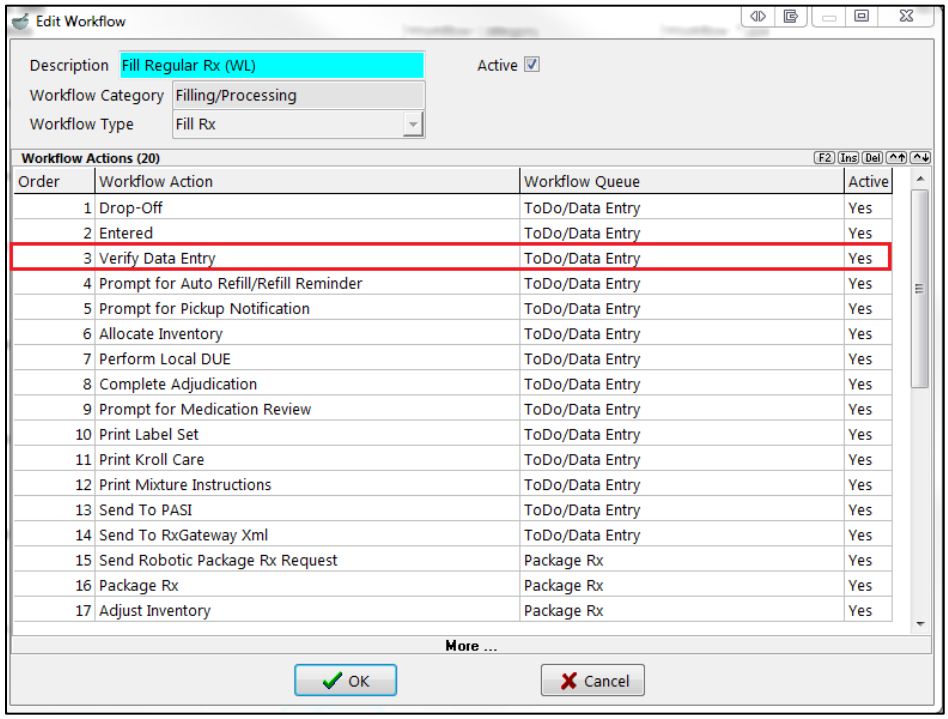
Customizing the Fill Regular Rx Workflow

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)**.

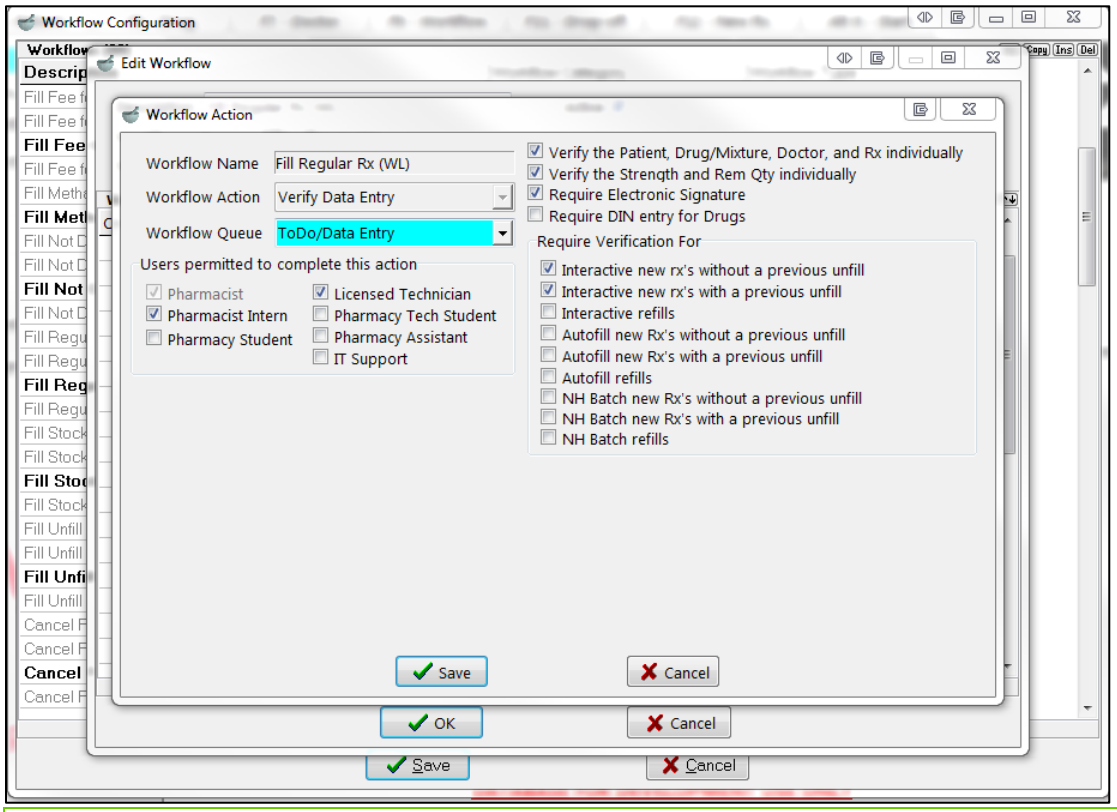


2. The **Edit Workflow** screen will appear. Double-click a **Workflow Action** to configure it to require an electronic signature capture.



Verify Data Entry

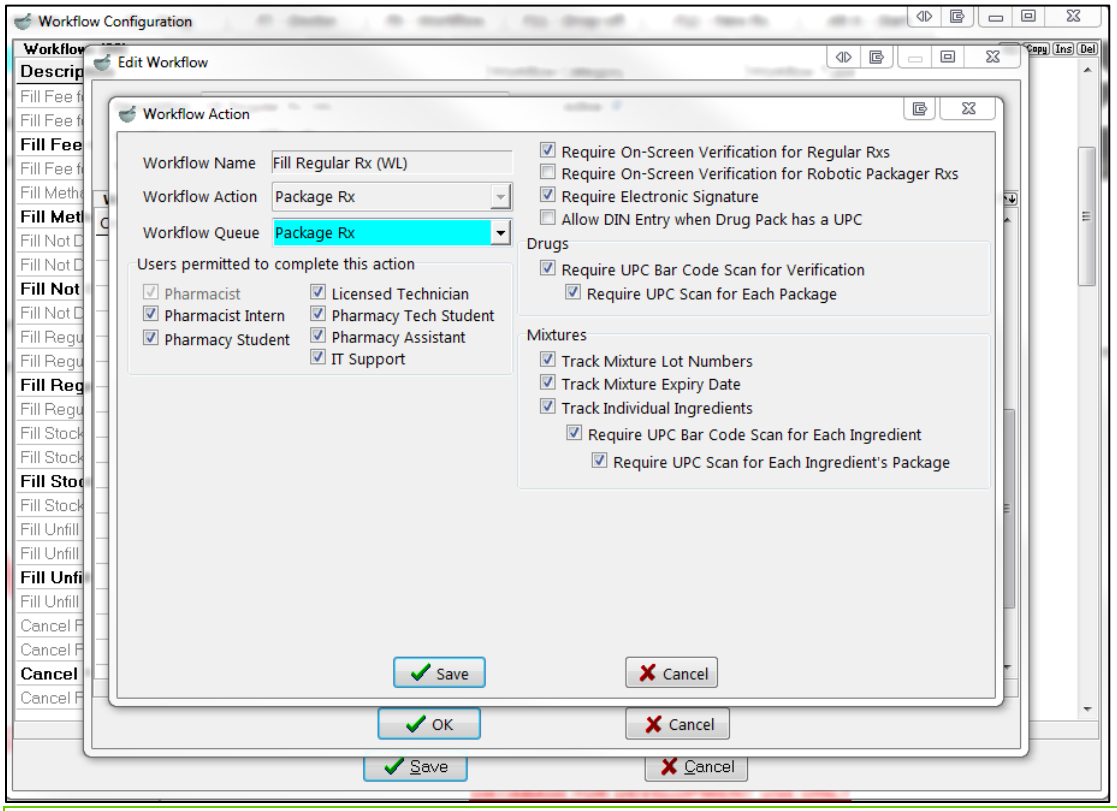
To configure the **Verify Data Entry** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



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

Package Rx

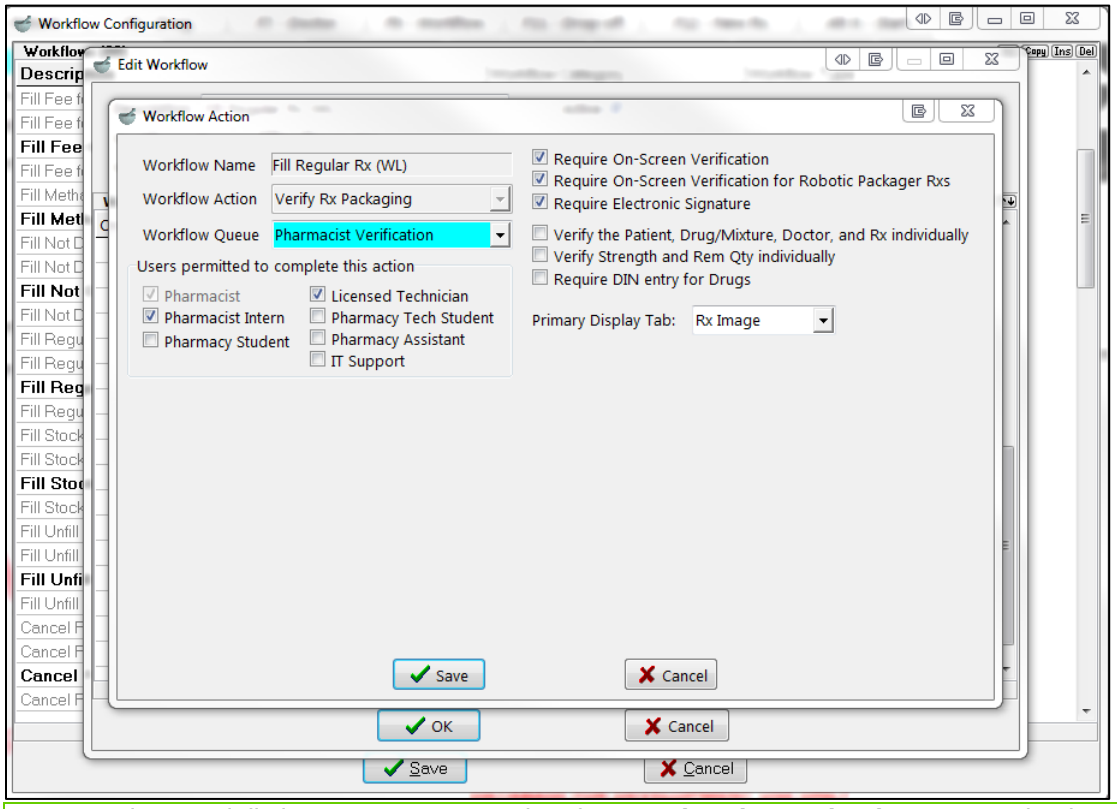
To configure the **Package Rx** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



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

Verify Rx Packaging

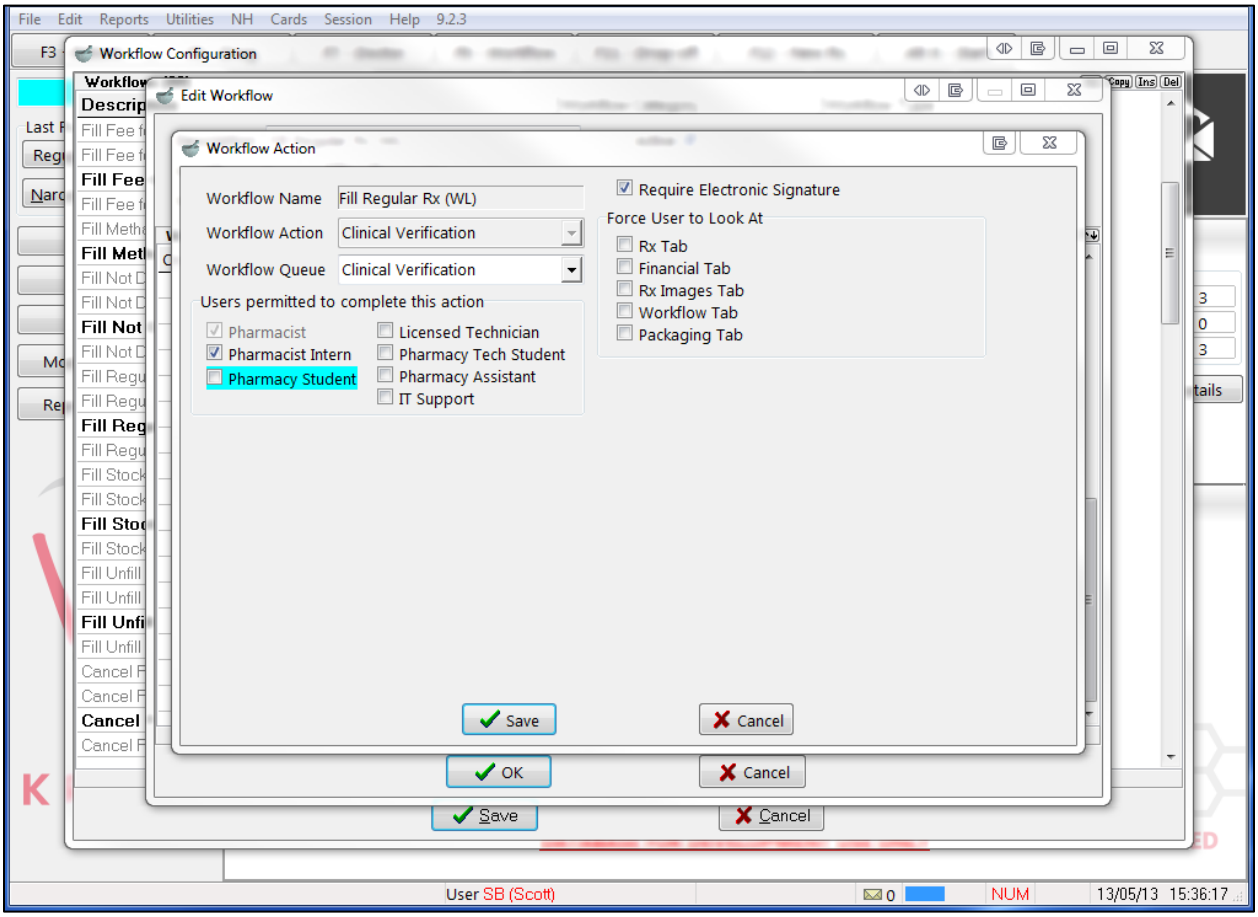
To configure the **Verify Rx Packaging** workflow action to require an electronic signature capture, ensure the following configuration options are enabled:



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:



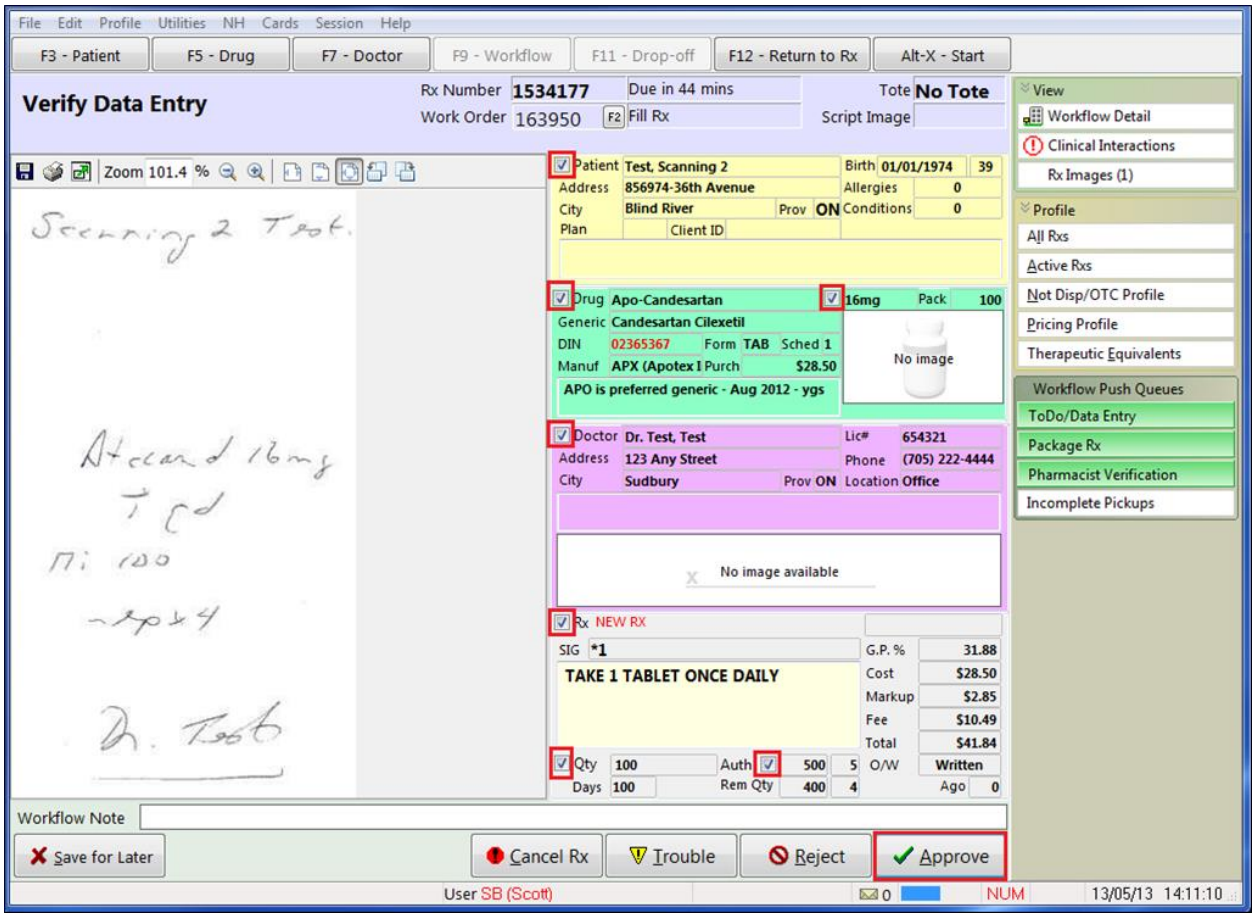
NOTE: It is especially important to ensure that the **Require Electronic Signature** option is enabled.

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.

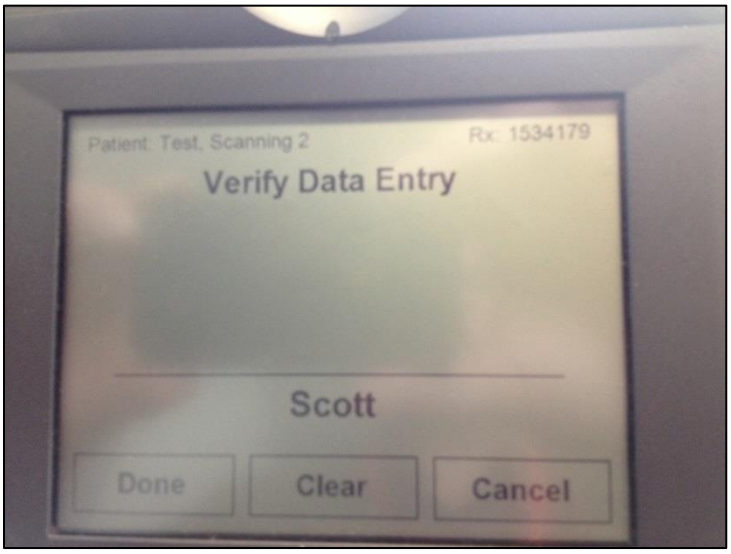
NOTE: The electronic signature tablet requires 125 points of reference to recognize and accept a signature. As such, full signatures are required. A signature of 'X', for example, would not be recognized by the electronic signature tablet.

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.



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

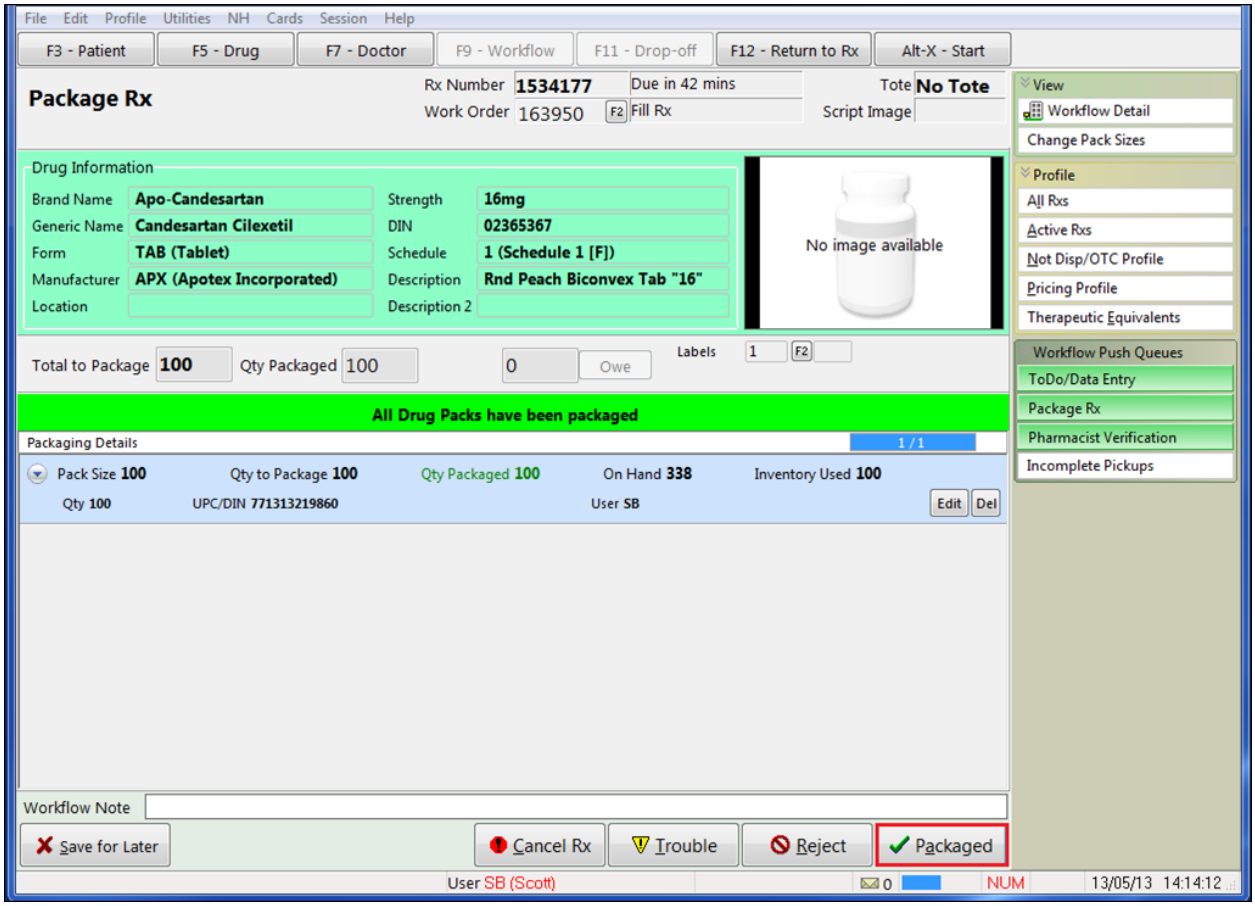
Have a pharmacist or verified user sign his or her name on the electronic signature tablet.



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.

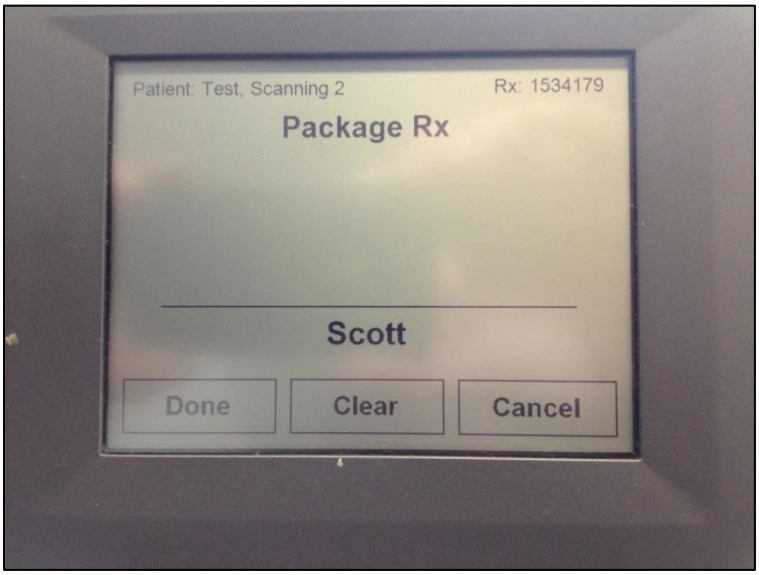
When you are finished, click **OK**.

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.



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

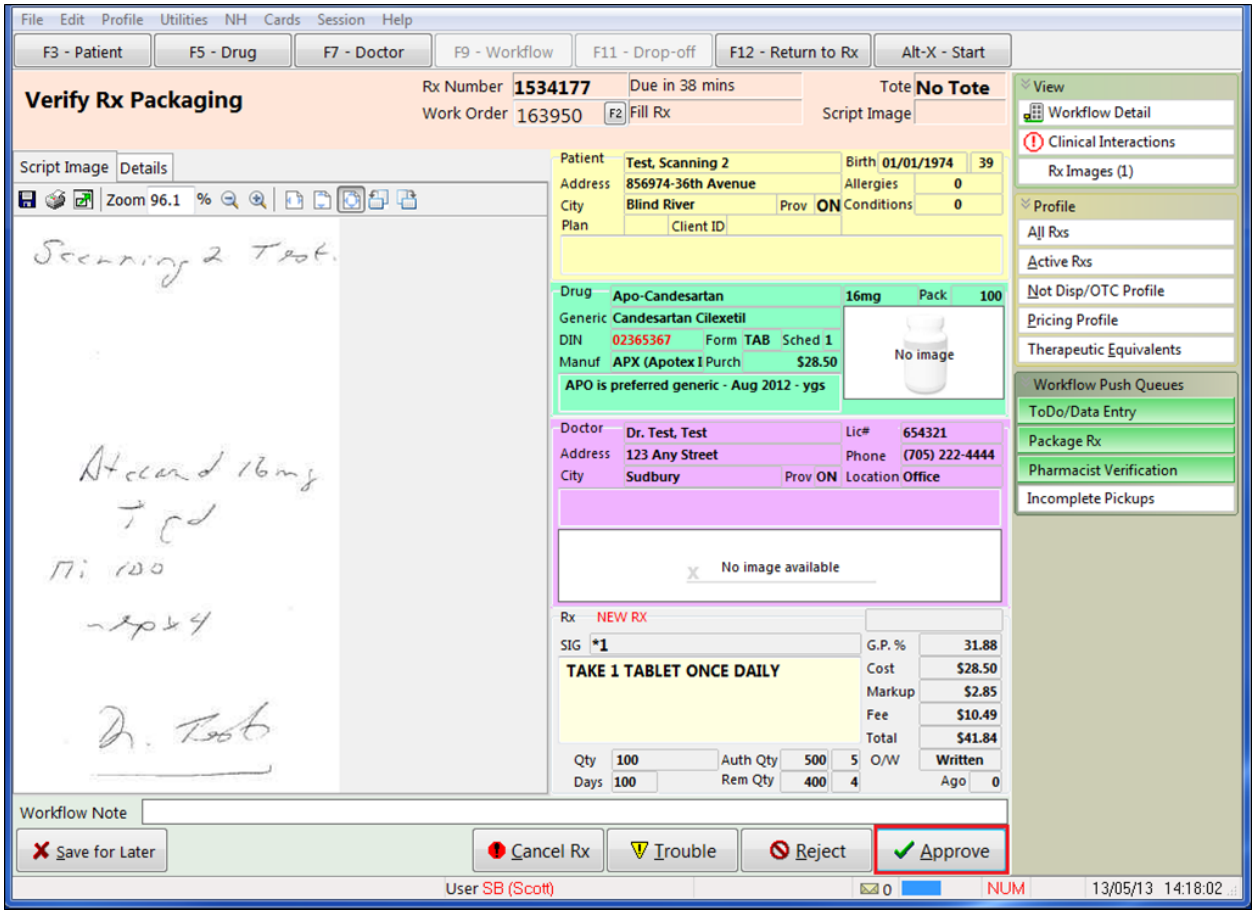
Have a pharmacist or verified user sign his or her name on the electronic signature tablet.



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.

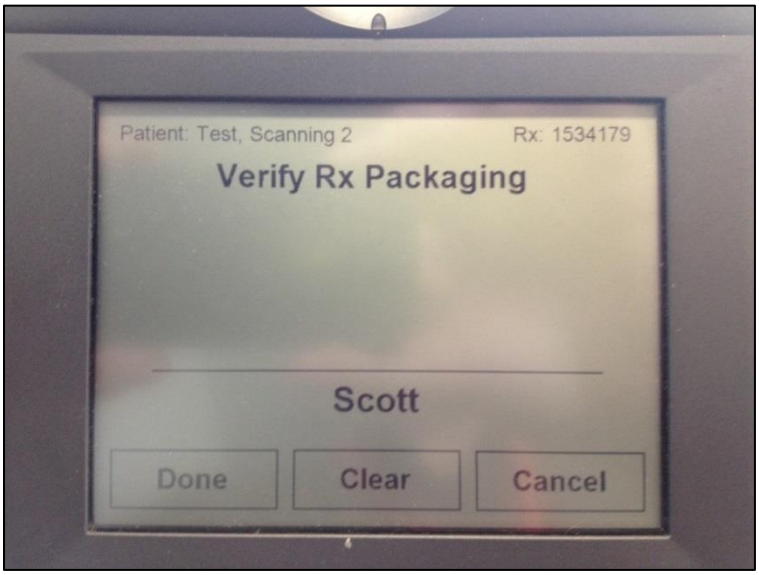
When you are finished, click **OK**.

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



The **Electronic Signature** screen will appear.

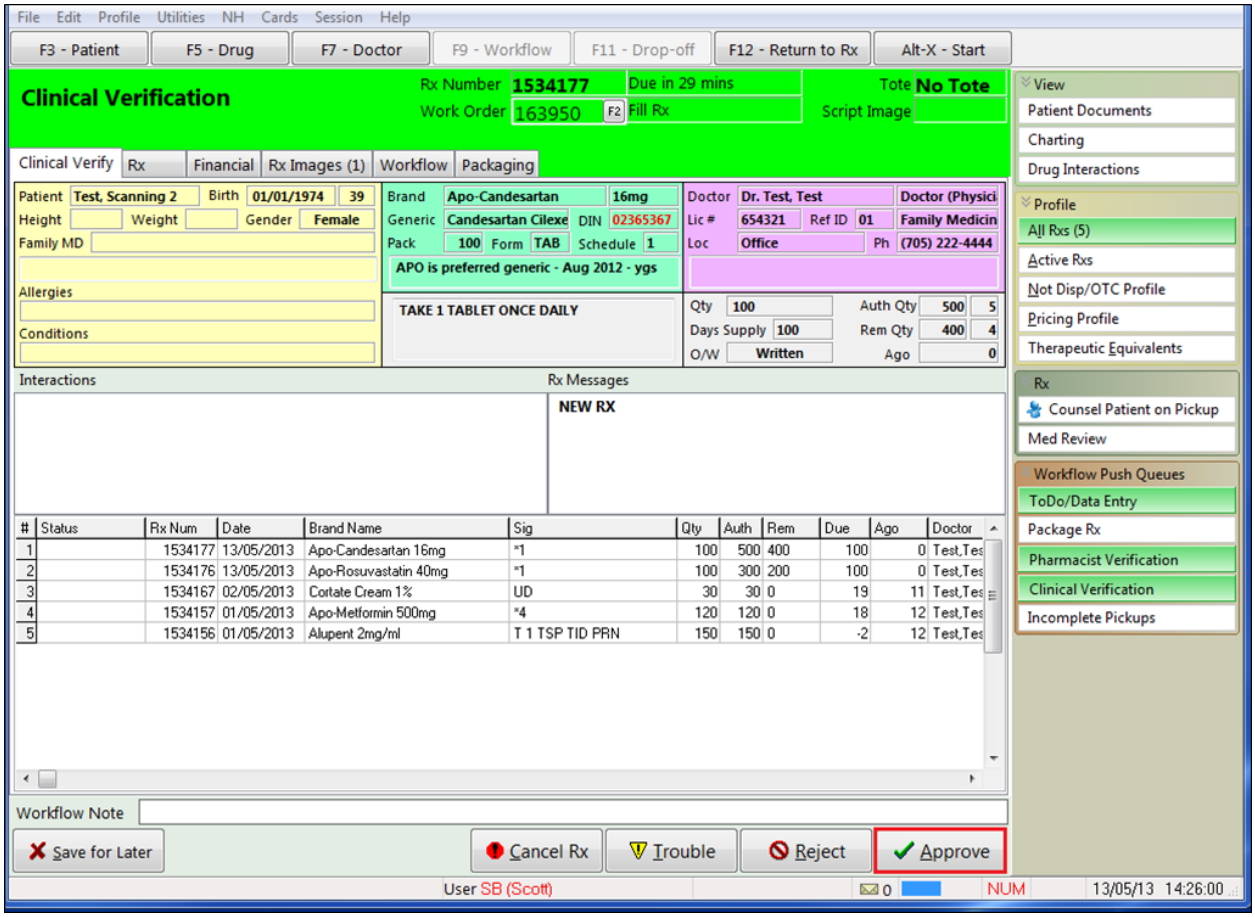
Have a pharmacist or verified user sign his or her name on the electronic signature tablet.



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.

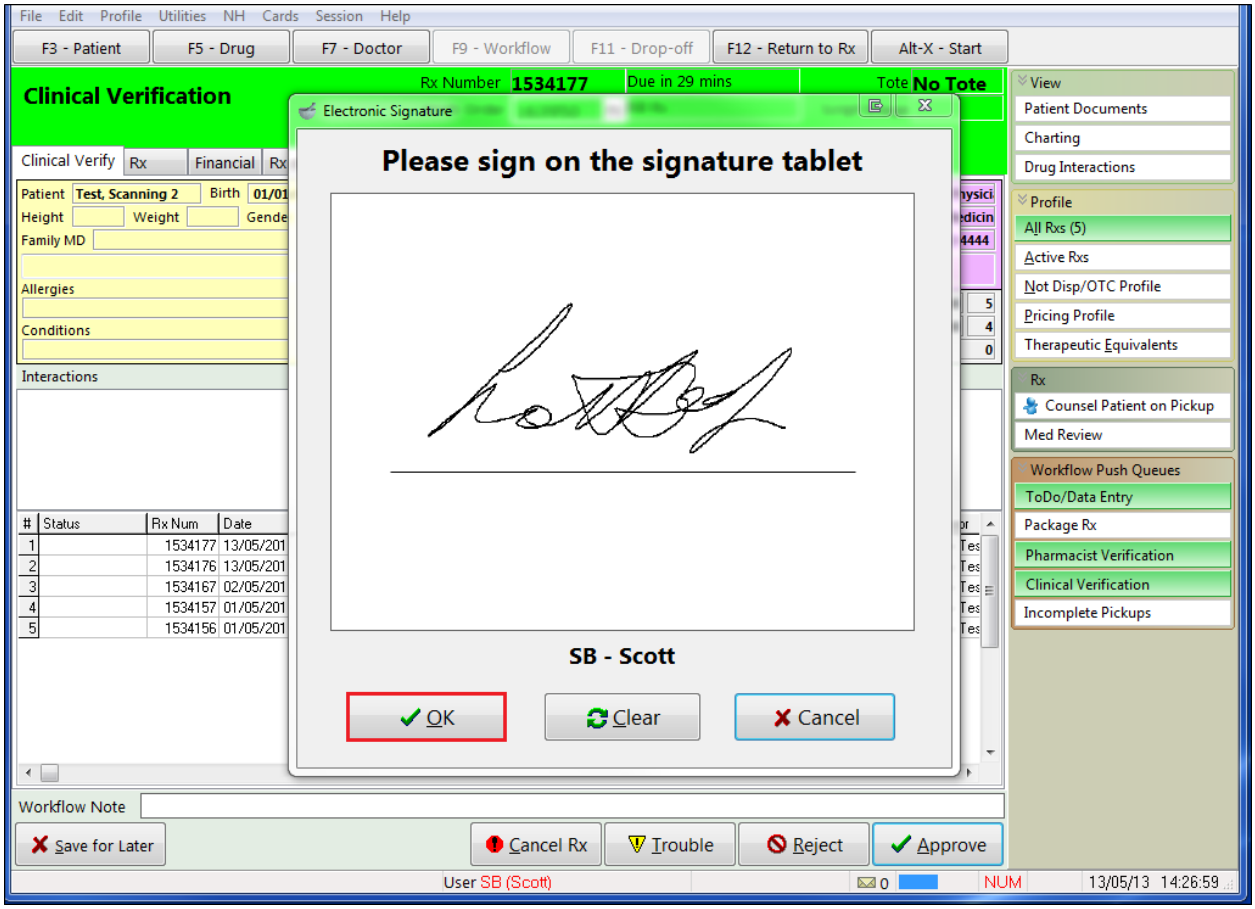


The **Electronic Signature** screen will appear.

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.

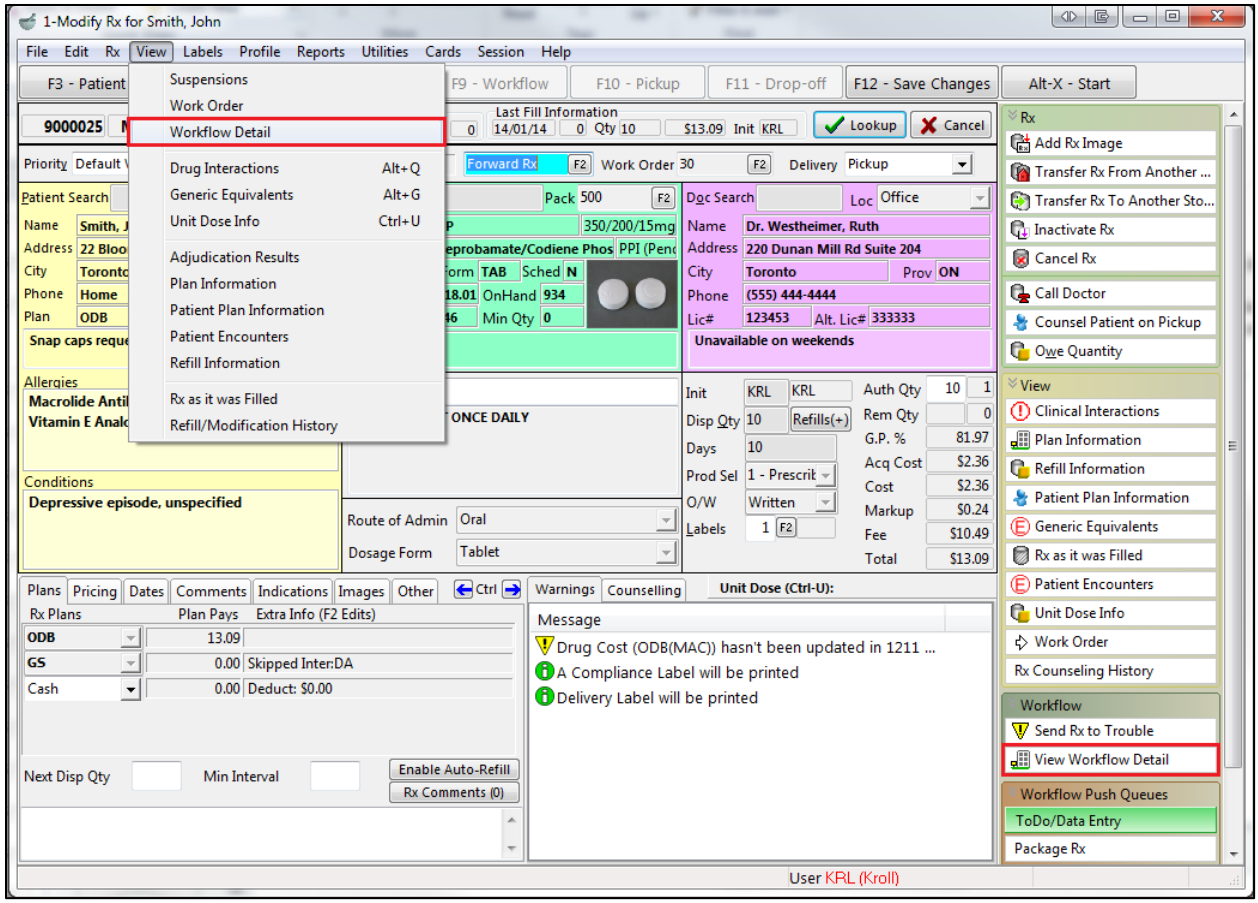
When you are finished, click **OK**.



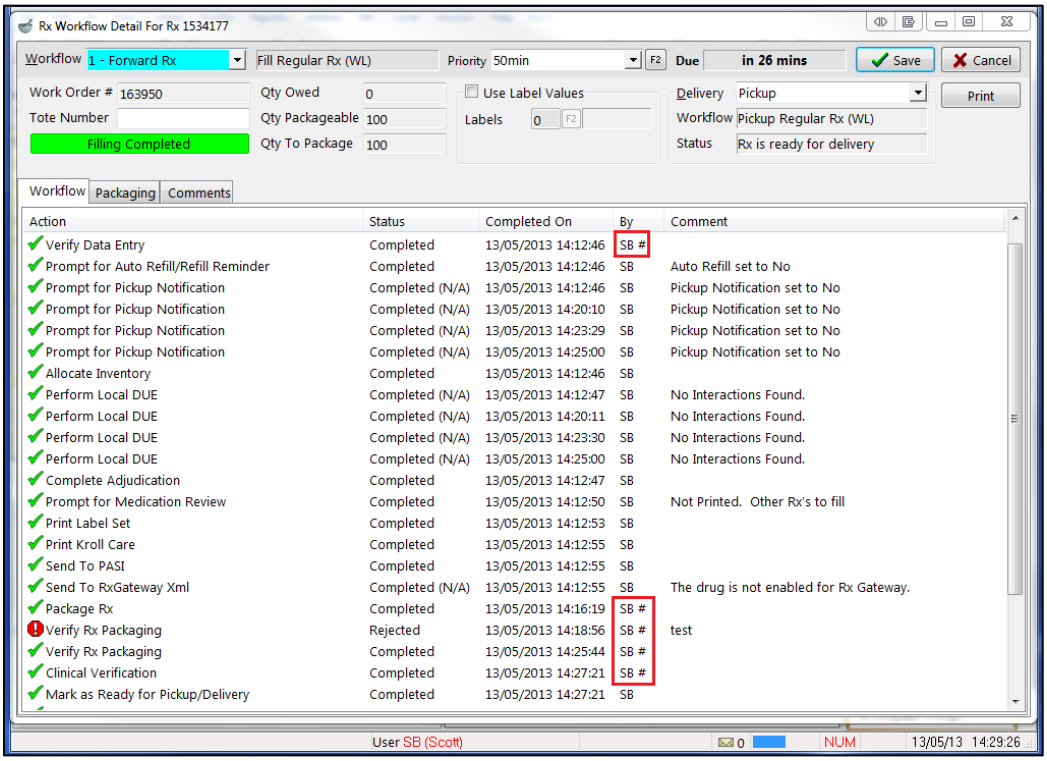
Viewing Electronic Signatures

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

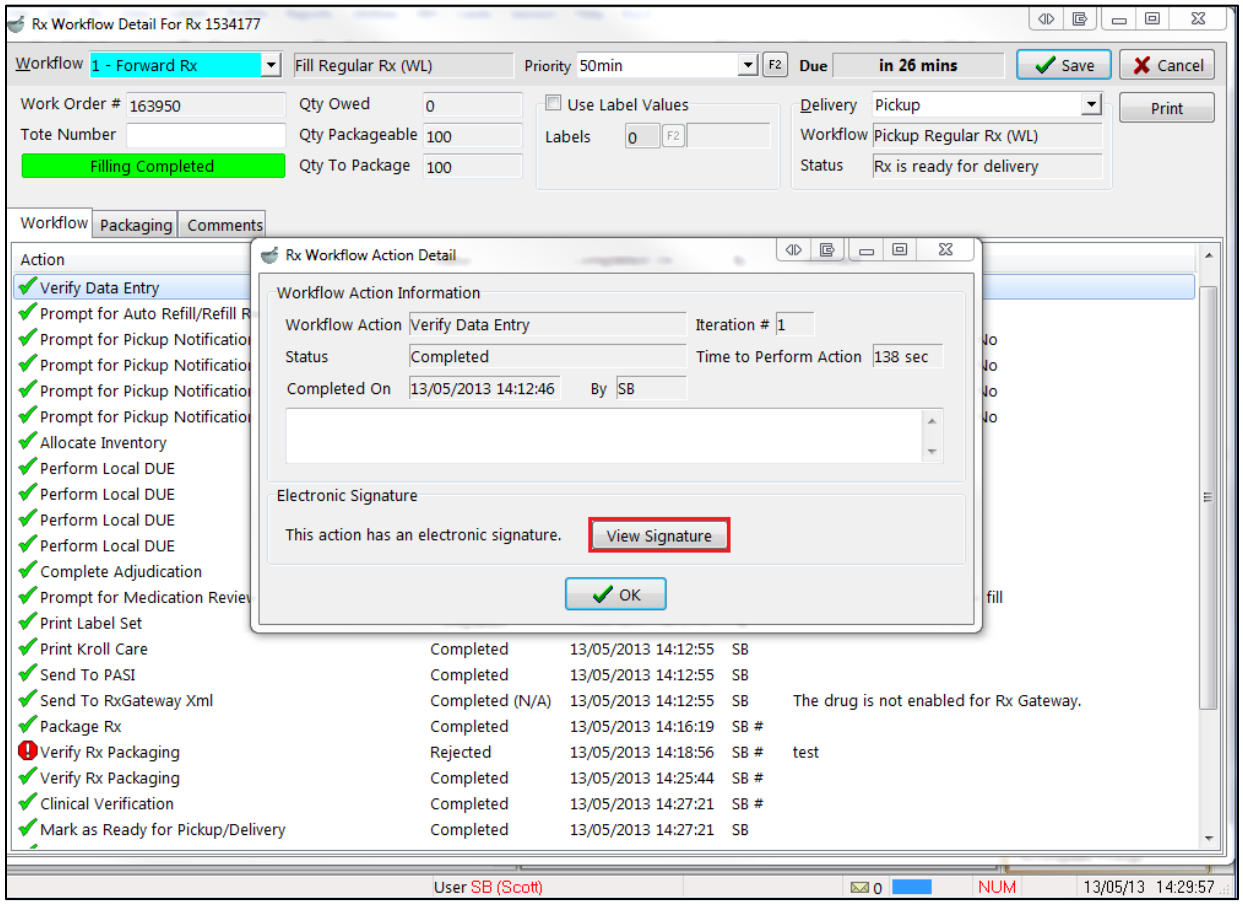
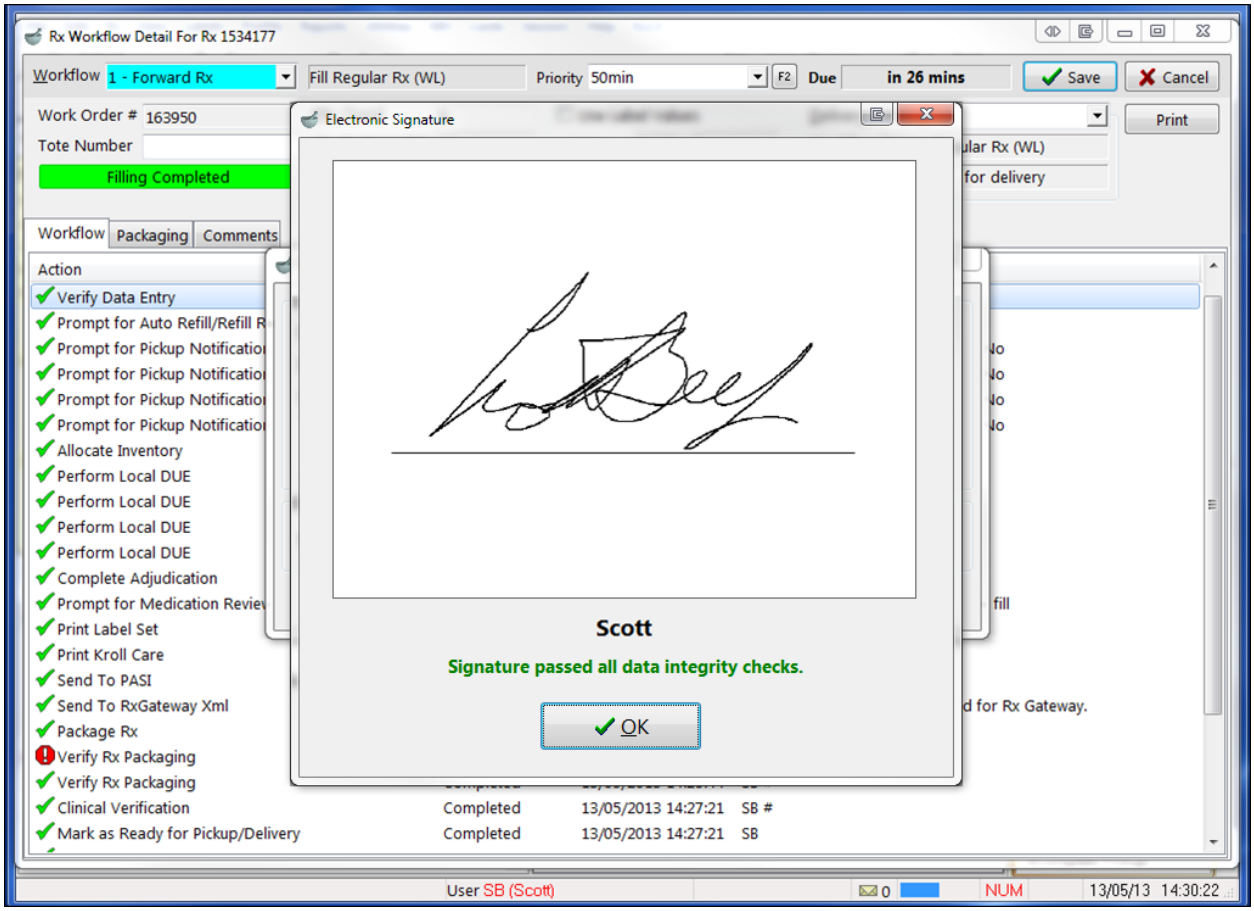
1. From the **F12 – Fill Rx** screen, select **View** > **Workflow Detail**, or select **View Workflow Detail** from the right navigation pane.



2. 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.



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



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