

PocketBilling 4.0TM

Installation Instructions

Welcome to PocketBilling 4.0

Introduction

Thank you for choosing PocketBilling 4.0 software! You have made a great choice by selecting one of the most capable charge capture solutions available on the market. PocketBilling is an industry-leading charge capture solution that will help you streamline your work day, document your patient encounters, and significantly reduce the payment turnaround time on your charge submissions.

What is Charge Capture Software?

Charge capture software is mobile software that enables you to code for patient encounters at the point of care. Physicians often find themselves having difficulty keeping up with their documentation and coding responsibilities due to the steadily increasing pressure to see more and more patients every day. Being able to code for a given encounter at the point of care allows physicians to handle this necessary responsibility as they see their patients, and makes it easy to document patient encounters as they unfold. Ultimately, charge capture software results in a reduction in the numbers of charges that are lost and thus increased physician reimbursement for work done.

Objectives

The objectives of this mini user manual are to:

- Help you to install PocketBilling 4.0

Thank you

Thanks again for choosing PocketBilling 4.0 as your charge capture solution. Let's get started with the installation instructions so we can get you up and running as soon as possible!

Getting Started

Introduction/Context

Before we get started, it is important to understand the context within which a PocketBilling 4.0 user is expected to use this software. In its current state, PocketBilling 4.0 offers both a desktop and mobile piece that allow users to organize and track patient information, encounter details, diagnoses, visits, charges and more. The Desktop piece provides a central repository for the information that physicians attain using the mobile piece over time. It also allows for a more convenient portal for data entry and editing, as well as the potential for communication with Practice Management Systems (PMS) that users' offices may already have in place. The mobile piece of PocketBilling 4.0 is intended to be used for Point of Care (POC) visit information and charge capture. Raw initial patient data entry into the mobile piece itself is certainly possible with PocketBilling 4.0 but, given the size constraints of most current mobile devices, it may prove to be somewhat cumbersome and is not recommended as optimal use of the software. As a PocketMed customer and PocketBilling user, how you use our software is up to you, but we certainly want to make everything work as efficiently as possible!

System Requirements

PocketBilling 4.0 is designed to be compatible with the vast majority of computing devices currently available on the market.

PocketBilling Desktop 4.0 will run on any PC running Windows 98 or later, provided there is greater than or equal to 256 MB of RAM, and 100 MB of hard disk space available.

*****NOTE for Windows Vista Users:**

With Windows Vista, Microsoft has instituted new security protocols that affect how mobile device programs sync. In order for the PocketBilling syncing conduit to run properly it must be installed and used by a user who has administrative rights on his/her machine running Windows Vista.

The PDA piece of the PocketBilling 4.0 program suite is designed to work with many of the most current OS releases of both Palm and Windows Mobile operating systems.

Palm: PocketBilling has been designed and tested on Palm OS 4.0 through Palm OS 5.4.9.

PPC: PocketBilling has been designed and tested on Pocket PC 2002 through Windows Mobile 5.

*****NOTE:** Some newer Windows Mobile PDAs have 240x240 screens. Due to the necessary complexity of some of the forms and views utilized in PocketBilling 4.0, the software was designed for devices with screen sizes of at least 320x240. PocketMed

believes that the smaller, 240x240 screen size can interfere with a user's ability to easily fill out forms and utilize mobile applications, and thus we do not currently support it. We are working to develop a solution for devices with smaller screens that will retain PocketBilling 4.0's functionality while maintaining the ease of use our products are known for.

Installing PocketBilling 4.0

Getting the Files

First, you must have the base environment for PocketBilling 4.0 as set out in the 'System Requirements' section above.

PocketBilling 4.0 files are available for download from www.pocketmed.com where you can download a 30-day trial version or purchase a fully operational, registered version; files are also available off of distributed CD-ROMs.

If downloading from the web, save the downloadable executable file into a directory on your hard drive that you can easily navigate to.

Initializing Local (Desktop) Installation [PPC & Palm]

Before you begin the installation process for PocketBilling 4.0, make sure that your PDA is appropriately connected to your computer, and that it is powered on.

1. Double click on the installer EXE file, or click on the appropriate button from the setup CD menu. Once open, you should see a screen (depending upon whether you have a Palm or Pocket PC) like the following:

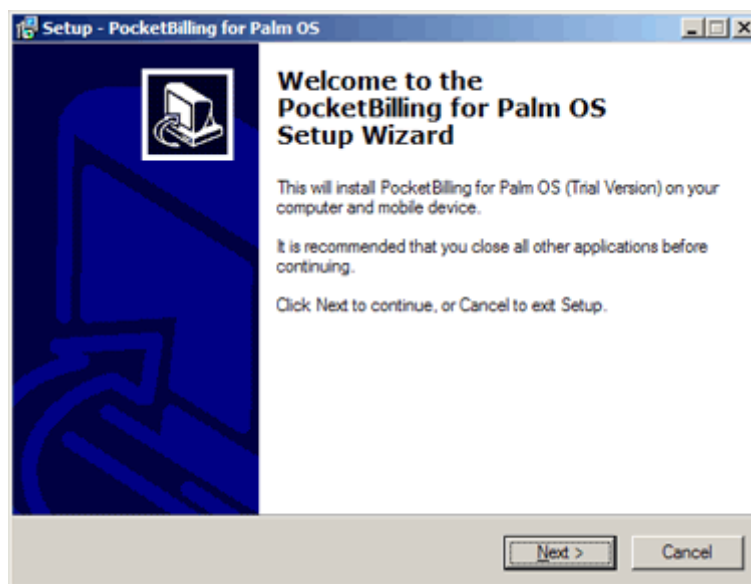


Figure 2.1: Initial Setup Wizard Screen

2. Click on the 'Next' button to proceed with the install.
3. The next screen includes PocketMed's License Agreement that you must accept in order to use PocketBilling software. Click on the radio button labeled 'I accept the agreement', and click the 'Next' button to continue.

From here, please proceed to your platform-specific installation instructions. Palm users, continue reading the next section. PPC users, jump ahead to 'For PPC Users Only'

FOR PALM USERS ONLY:

If you are using PocketBilling 4.0 for the Pocket PC, please jump ahead to the 'For Pocket PC Users Only' section of this chapter.

4. Palm users, you should now be viewing the Select Applets screen:

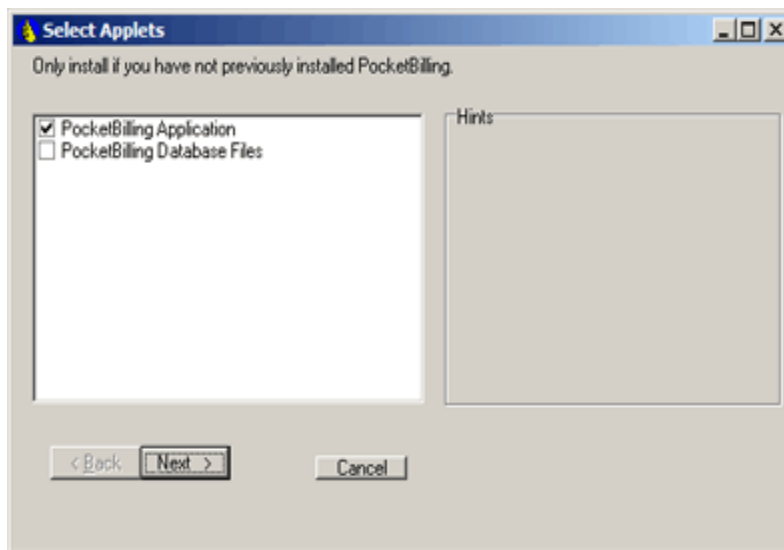


Figure 2.2: Select Applets Screen for Palm Installations

5. By default, the second check box, "PocketBilling Database Files", is left unchecked. **IF YOU ARE UPGRADING FROM A TRIAL VERSION** of PocketBilling that you have stored patient data with, **LEAVE THIS BOX UNCHECKED!!!** If this is a new installation or upgrade from 3.0, click to check the second box **before** proceeding.

NOTE: As is explained in the 'Hints' box, checking of the option 'PocketBilling Database Files' will override any databases or data you may have already stored with a previous (trial) version of PocketBilling and thus can result in the loss of

crucial patient data. Again, make sure that this box is **not** checked if you are upgrading from a trial version that you have used to store patient data.

6. Click on the 'Next' button to proceed.
7. A window will come up asking you to select the user for which PocketBilling should be installed on your PDA. Highlight the appropriate user, and click 'Next'. This will prompt the installer to install the appropriate files on your computer:
NOTE: PocketBilling 4.0 is designed to be installed on the **main memory** of your PDA. Attempts to try to install the program to your PDA's extended memory card will result in the generation of an error.



Figure 2.3: Palm Select Handheld User Screen

8. After the files are installed on your computer, you will see a pop-up indicating that the installation will be complete upon synchronization of your mobile device

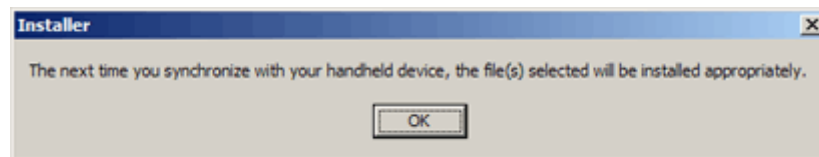


Figure 2.4: Confirmation of Palm Installation Pending Sync

9. Click 'OK' to exit the installer program, and then connect & synchronize your PDA.

10. After synchronization, PocketBilling 4.0 should be present and fully functional on your mobile device. **In order to appropriately set up PocketBilling Desktop 4.0, launch PocketBilling on your PDA, and then synchronize your PDA once again** (this allows PocketBilling forms to be backed up onto your desktop to a location where they are accessed by the desktop software).

NOTE: Perform the 2nd synchronization of your device **BEFORE** opening/using PocketBilling 4.0 Desktop

If you are upgrading from PocketBilling 3.0, please proceed to the “*Upgrading from PB3.0*” section of this chapter for further instruction on completing the upgrade.

FOR POCKET PC USERS ONLY:

If you are using PocketBilling 4.0 for the Palm, please go up to the ‘*For Palm Users Only*’ section of this chapter.

4. Pocket PC users, you should now be viewing the Select Additional Tasks screen:

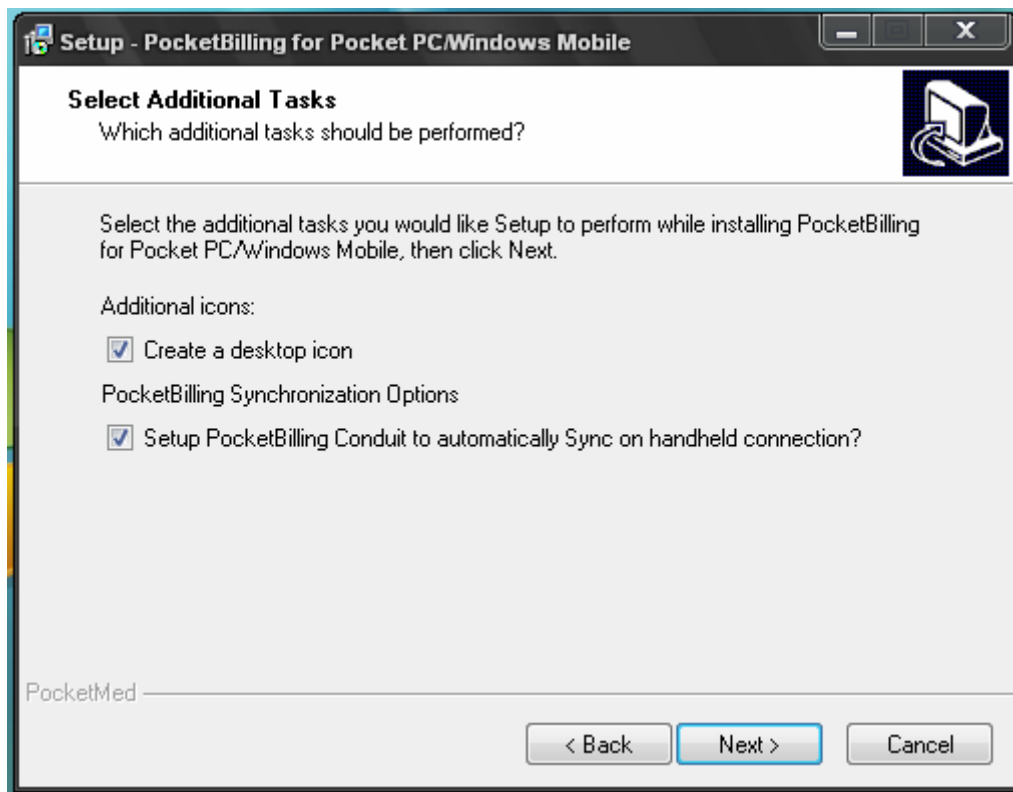


Figure 2.5: PPC Select Additional Tasks Screen

5. According to your preferences, check the appropriate boxes to either ‘Create a desktop icon’, or ‘Setup PocketBilling Conduit to automatically Sync’ (**recommended**). Click ‘Next’ to continue.
6. The following screen will notify you that the software is ready to install, and will list any additional tasks you may have selected. Click ‘Install’.
7. A window will come up asking you to select the user for which PocketBilling should be installed on your PDA. Highlight the appropriate user, and click ‘Next’. This will prompt the installer to install the appropriate files on your computer:
NOTE: PocketBilling 4.0 is designed to be installed on the **main memory** of your PDA. Attempts to try to install the program to your PDA’s extended memory card will result in the generation of an error

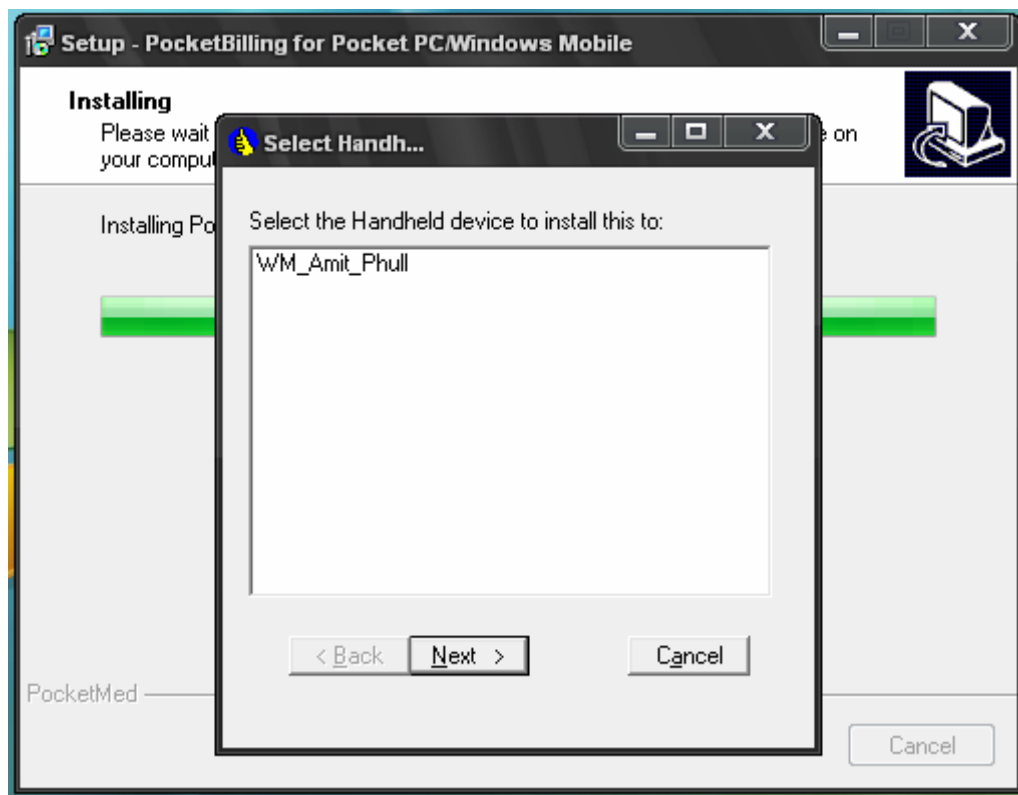


Figure 2.6: PPC Select Handheld User Screen

8. After the files are successfully installed to your computer, you will be instructed to direct your attention to your PDA to complete any last installation steps. Follow any instructions that appear on your PDA screen. Click ‘OK’.

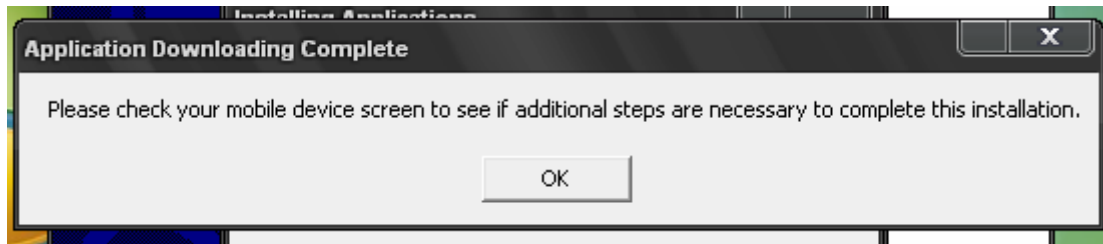


Figure 2.7: PPC Check PDA Pop-up

9. Following successful PDA installation, a screen will come up informing you that PocketBilling setup has finished. Click 'Finish'.
10. After synchronization, PocketBilling 4.0 should be present and fully functional on your mobile device. **In order to appropriately set up PocketBilling Desktop 4.0, launch PocketBilling on your PDA, and then synchronize your PDA once again** (this allows PocketBilling forms to be backed up onto your desktop to a location where they are accessed by the desktop software).
NOTE: Perform the 2nd synchronization of your device **BEFORE** opening/using PocketBilling 4.0 Desktop

If you are upgrading from PocketBilling 3.0, please proceed to the “*Upgrading from PB3.0*” section of this chapter for further instruction on completing the upgrade.

Upgrading From PocketBilling 3.0

Upgrading from PocketBilling 3.0 begins just like a fresh install of PocketBilling 4.0. If you have not yet installed 4.0, please refer to the “*Installing PocketBilling 4.0*” section of this manual before you proceed with your upgrade.

After performing the initial installation of the PocketBilling 4.0 software as described in the above section, there are a few steps necessary to finish your upgrade from PocketBilling 3.0.

1. Open up the PocketBilling Desktop 4.0 Software (make sure you have performed the appropriate synchronizations of your PDA **BEFORE** doing this!).
2. From within the PocketBilling Desktop 4.0 software select **File > Import PocketBilling 3.0 Data**

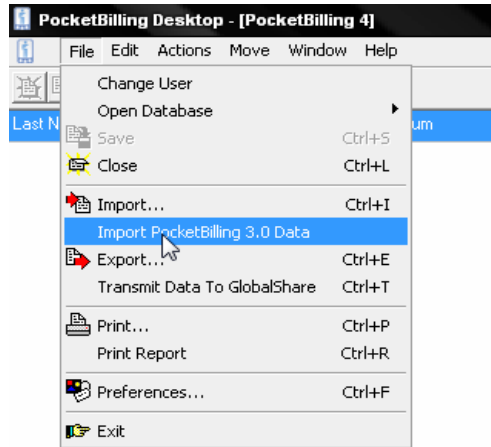


Figure 2.8: PB3.0 to 4.0 Upgrade Process

3. Depending on your PDA software, a window may pop up prompting you to select the appropriate handheld user to perform the import for (this is the same window that you encountered during initial software setup). If so, select the appropriate user and click 'Next'. If not, simply continue on.
4. A window that displays a search for PocketBilling 3.0 databases will appear. Once the appropriate databases are located by the program, the program will import your data and complete the upgrade to PocketBilling 4.0.