

RxPertise[™]

Consulting Software

Version 8.5

Download and Installation Guide



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Version 8.5

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1. Download instructions – version 8.5

Thank you for choosing RxPertise™ Consulting Software, version 8.5. The following steps will take you through the download process. **Before you start: Be sure you have a strong, solid internet connection (i.e. not an “air-card”), since you will be downloading a very large file from our web site.**

From our home page at www.rxpertise.com, click on the Downloads button to access the Downloads page. Click on the appropriate link to download the installation image.

You will then be directed to another page to authenticate your product ID:

RxPertise™ Download of version 8.5

Here you'll be able to download the entire version 8.5 installation image.

Please enter your RxPertise Product ID (found within RxPertise by going to Help > About) and your email address in the required fields. Then, click Download. You will be prompted to Save the file, which you should select. Choose a location on your computer's hard drive where you can easily access the file, such as your Desktop.

Download Rxpertise 8.5 Setup

* Product ID -

* Email address

Download Cancel

* = Required field

If you are new to 8.5, your product ID will be provided via email when your order is processed. If you are an existing user, you may find your product ID within your current version of RxPertise under Help > About:

About RxPertise

RxPertise Consulting Software
Version: 8.0.3623.30482 Standard

Copyright Managed Health Care Associates, Inc. (MHA) 2009. All Rights Reserved.

This product is licensed to:

Your Name

Product ID : XXXX - XXXXXX

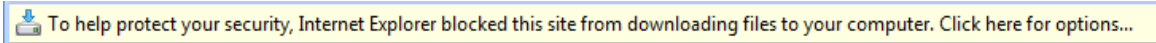
Activation Code : A New Activation Code will be provided when RxPertise 8.5 is registered.

Visit the RxPertise website : <http://www.RxPertise.com>

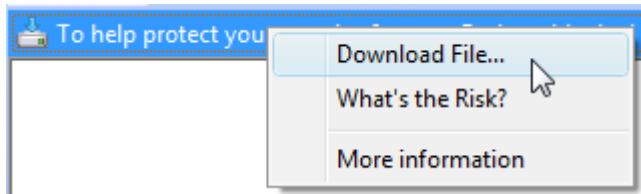
Visit the MHA website : <http://www.mhainc.com>

OK

Enter in the necessary information and click 'Download'. Most browsers will display a download confirmation message such as this:



Enable the download option:



When prompted to either Save or Run the file, it is important that you choose to 'Save' the file to your hard drive. Do NOT choose the option to simply Open the file. This is a very large file, and choosing to open this file that's streaming data to you will likely result in failed downloads.

RxPertise provides you with three download attempts, after which you will need to contact us for assistance.

When the file is downloaded, you will next need to unzip/extract the contents within. Use either the built-in Windows extracting utility or some commercially available product (ex. WinZip) to extract the files. (Generally, if you right-click the downloaded file you will be presented with an option to open your extraction utility or simply an "extract" option). Extract the files to a folder location that's convenient for access. Your Windows Desktop, for instance, may be a good location.

Once the downloaded folder is extracted, you may continue with the installation process below.

2. *Installation instructions – version 8.5*

Thank you for choosing RxPertise™ Consulting Software, version 8.5. The following steps will take you through the installation process, will discuss steps to follow if you are upgrading your 6.x, 7.x or 8.0 database(s), and will explain the registration procedure.

Important things to review before installing:

- RxPertise™ the following versions of Microsoft Windows:

Windows 7, 32-bit or 64-bit* versions:

- Home Premium
- Professional
- Ultimate
- Enterprise

Windows Vista, 32-bit or 64-bit* versions:

- Home
- Home Premium
- Business
- Enterprise
- Ultimate


Windows XP 32-bit or 64-bit* versions (Service Pack 2 or higher required)

Windows 2000 32-bit versions (Service Pack 4 required)

*Support for 64-bit systems is limited to WOW (Windows on Windows) 32-bit emulation.

- RxPertise™ supports 32 bit versions of Windows 7, Windows Vista (Home, Home Premium, Business, Enterprise, or Ultimate), Windows XP Service Pack 2, or Windows 2000 Service Pack 4. Version 8.5 also supports 64 bit versions of Vista and Windows 7. The RxPertise web site has specific software/hardware requirements that may be verified.
- You must be logged in as an Administrator (vs. a standard user) to install RxPertise™. If you are the sole user of the computer, and are not connected to any network, it is likely that you are already logged in as Administrator.
- RxPertise™ v8.5 users will be able to run v8.0 and v8.5 on the same computer. This is intentional, and offered as a courtesy, so as to acclimate you to the new features of v8.5.
- Database upgrading between older versions and 8.5 is a one-way process, and once the database has been upgraded, it will only be read by version 8.5.
- Please bear in mind that you will need to manually uninstall any older versions of RxPertise via the Windows Control Panel once you've completed your conversion.

The RxPertise™ 8.5 Installation packet is available via CD or via a downloadable archive file (“Rx85Setup.zip”) from our website at www.rxpertise.com. To emulate “inserting a CD,” this archive file will first need to be extracted (un-zipped). This may be done in a variety of ways, either with Windows’ built-in extract utility or by using commercially available programs such as Win-Zip™. Once the extraction procedure is complete, you will have a Windows folder called “Rx85Setup”. Within that folder you’ll find the executable file called ‘Autorun.exe’:

 autorun.exe

Double click on it to launch the auto-run procedure, and you will be prompted with our installation options:

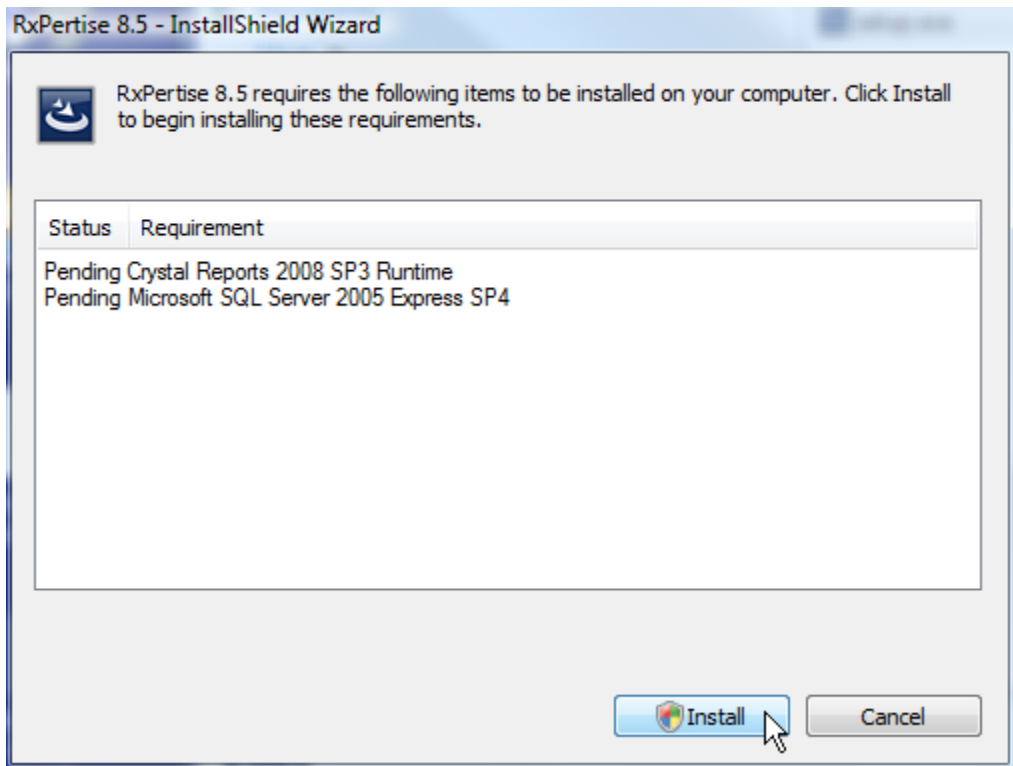


Each of the menu buttons on the left will display sub-menus of other options. Each of these buttons will also provide an explanatory tooltip when you hover your cursor over it.

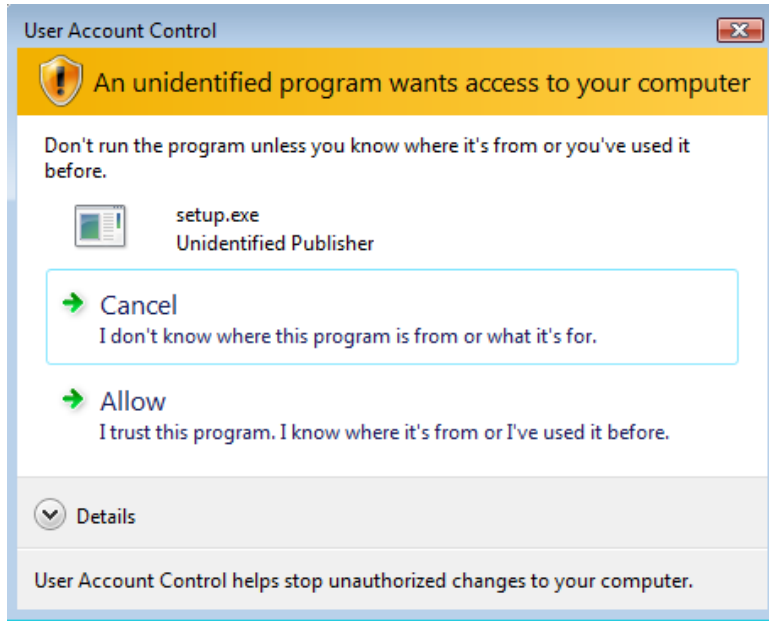
To begin installation, click on the ‘Install’ button, and you will see:



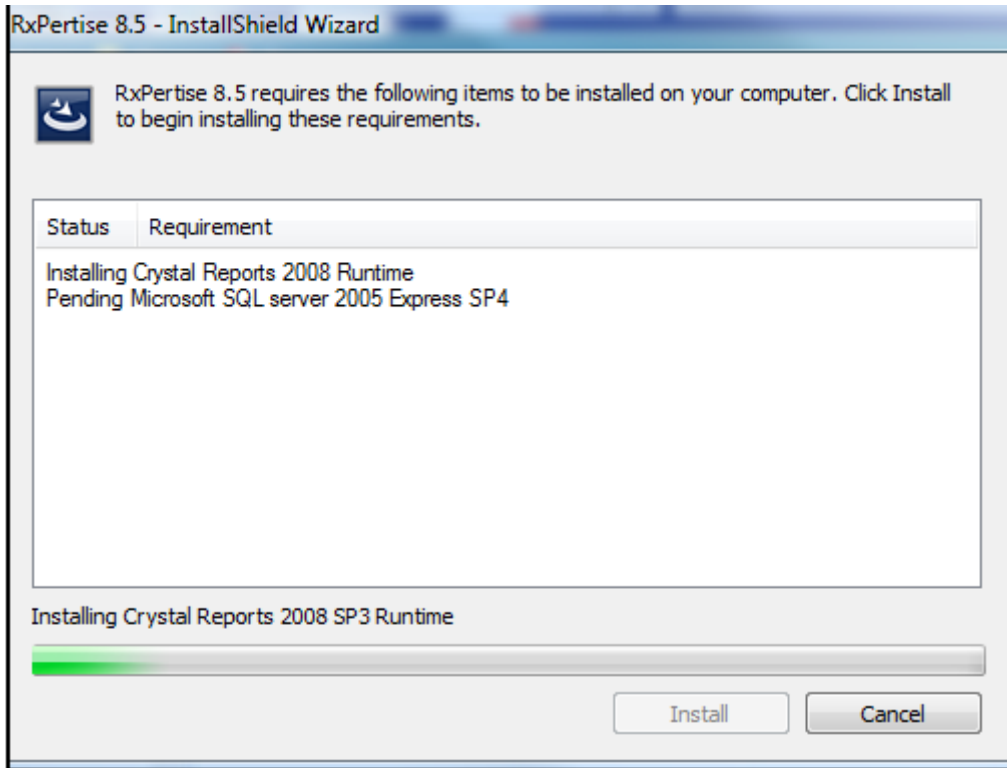
Click on RxPertise 8.5 to begin installation. If needed, any necessary support files will be installed prior to the actual installation of RxPertise itself:



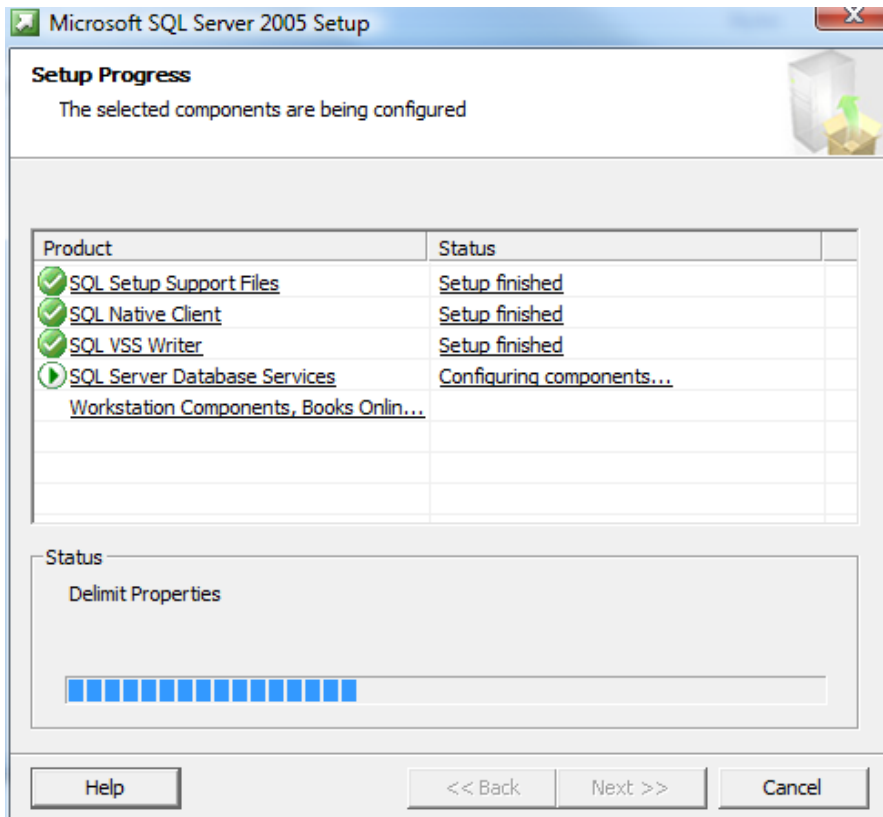
Click on 'Install' to continue. Windows 7 or Windows Vista users may see a User Account Control prompt similar to this:



Choose 'Allow' to let the installation program proceed and the installation of the support files will continue:



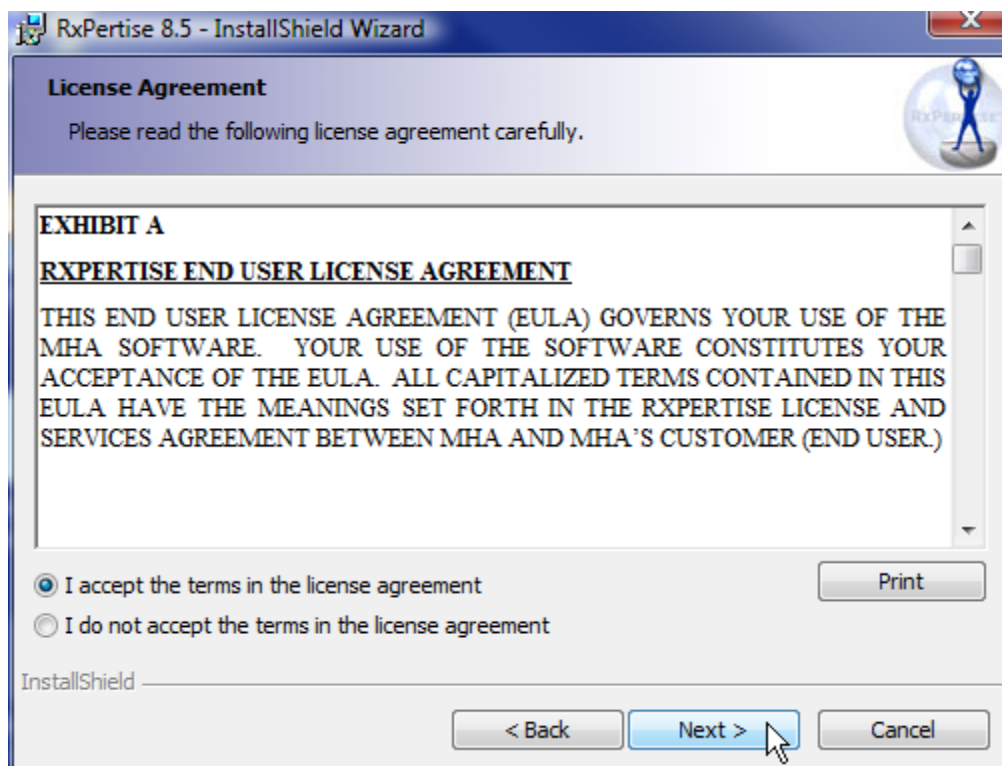
In the above example, which is typical for most installations, the Microsoft SQL Server 2005 Express **may take as long as 15 minutes to install. Please do not reboot your machine or turn off your machine during this time:**



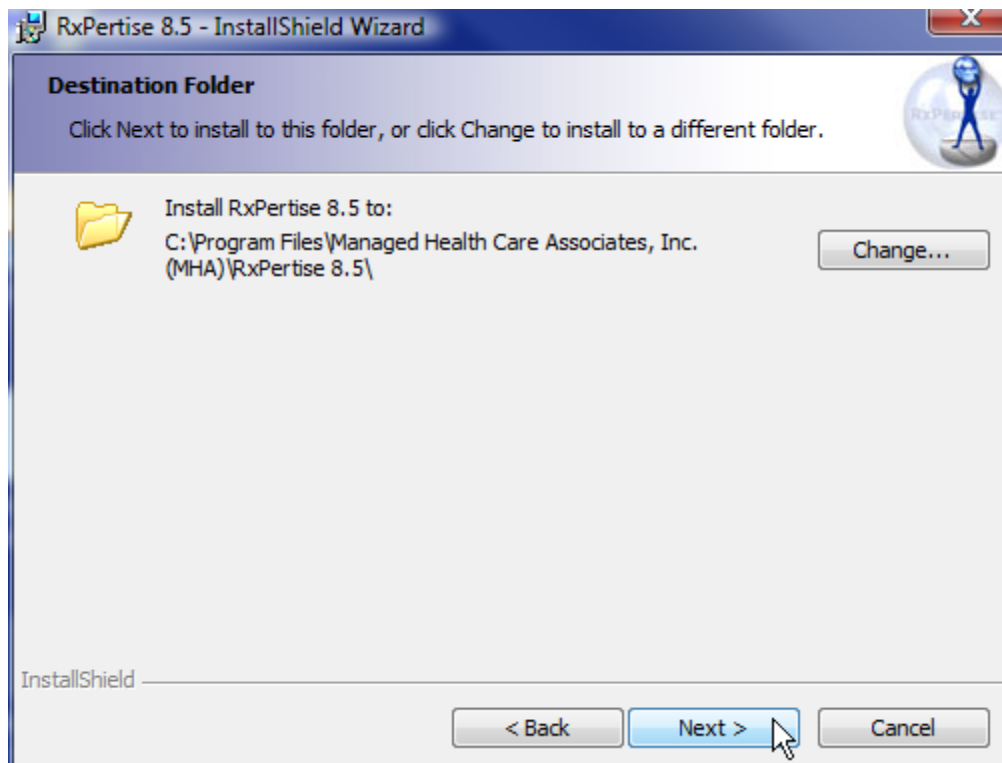
When the requisite programs are installed, RxPertise 8.5 will install. Click on 'Next' to begin the process:



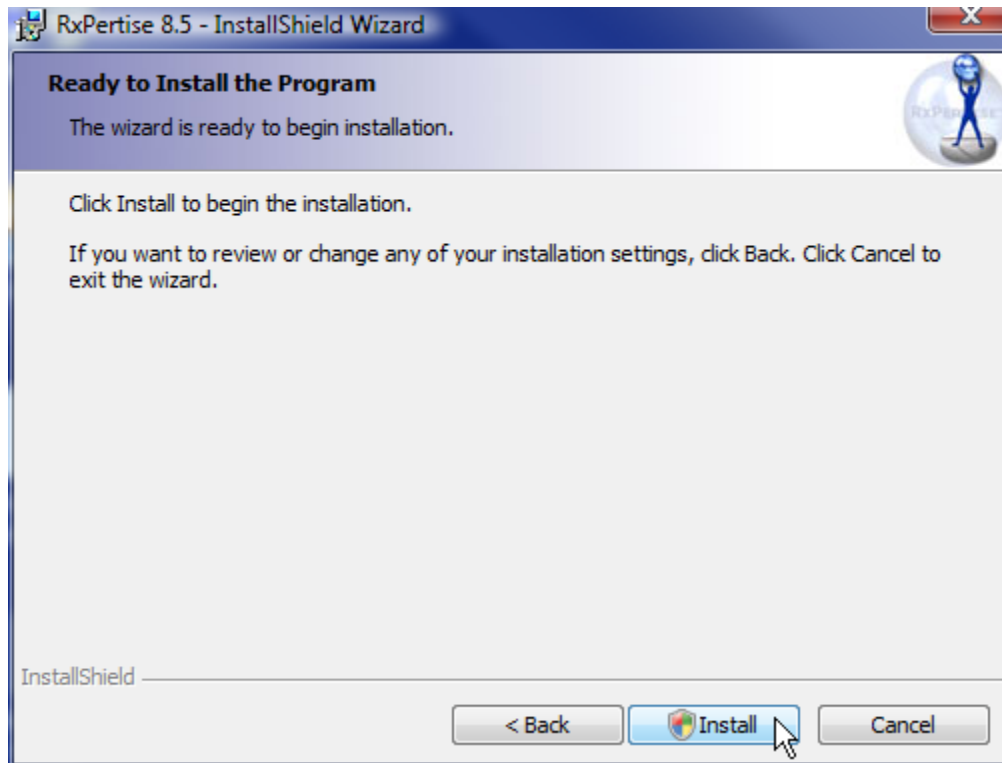
Click 'Next' to continue and the RxPertise License Agreement will appear:



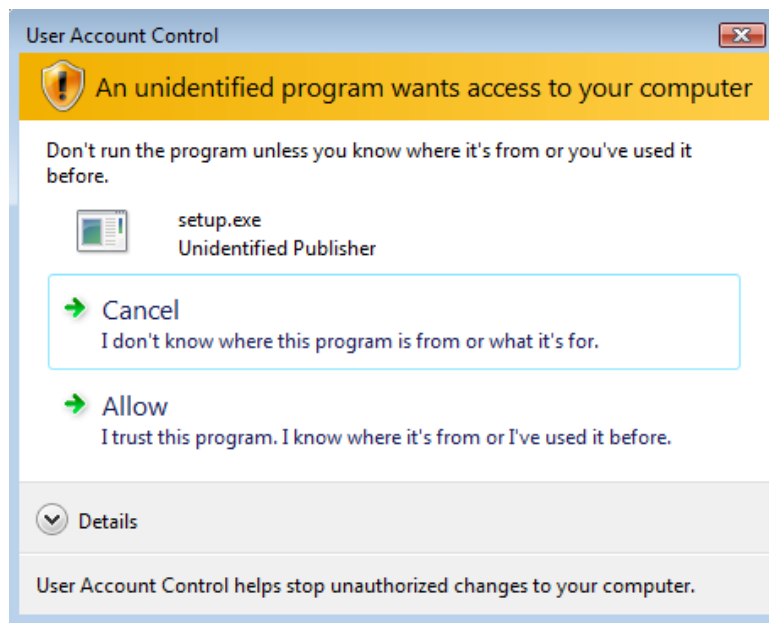
Be sure to review the Agreement carefully and, if acceptable, click in the 'I accept' button and then 'Next' to select the destination folder for the RxPertise installation:



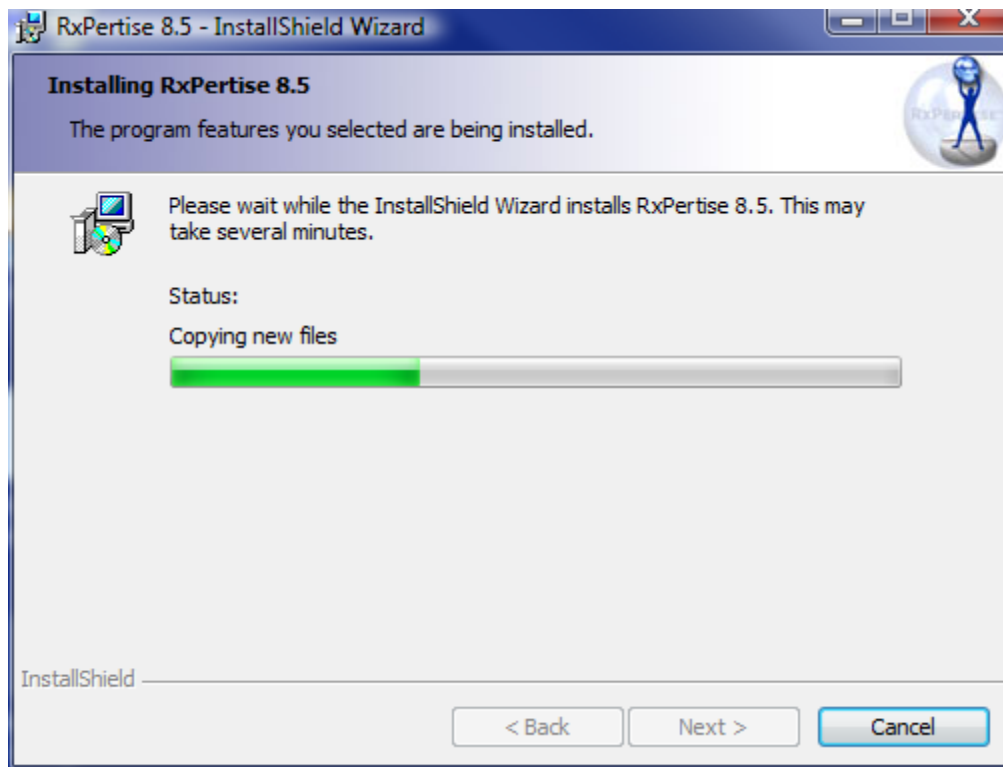
You may change the folder, but it is **strongly recommended** that the program is installed in the default folder as **illustrated above**. Click on 'Next to continue:



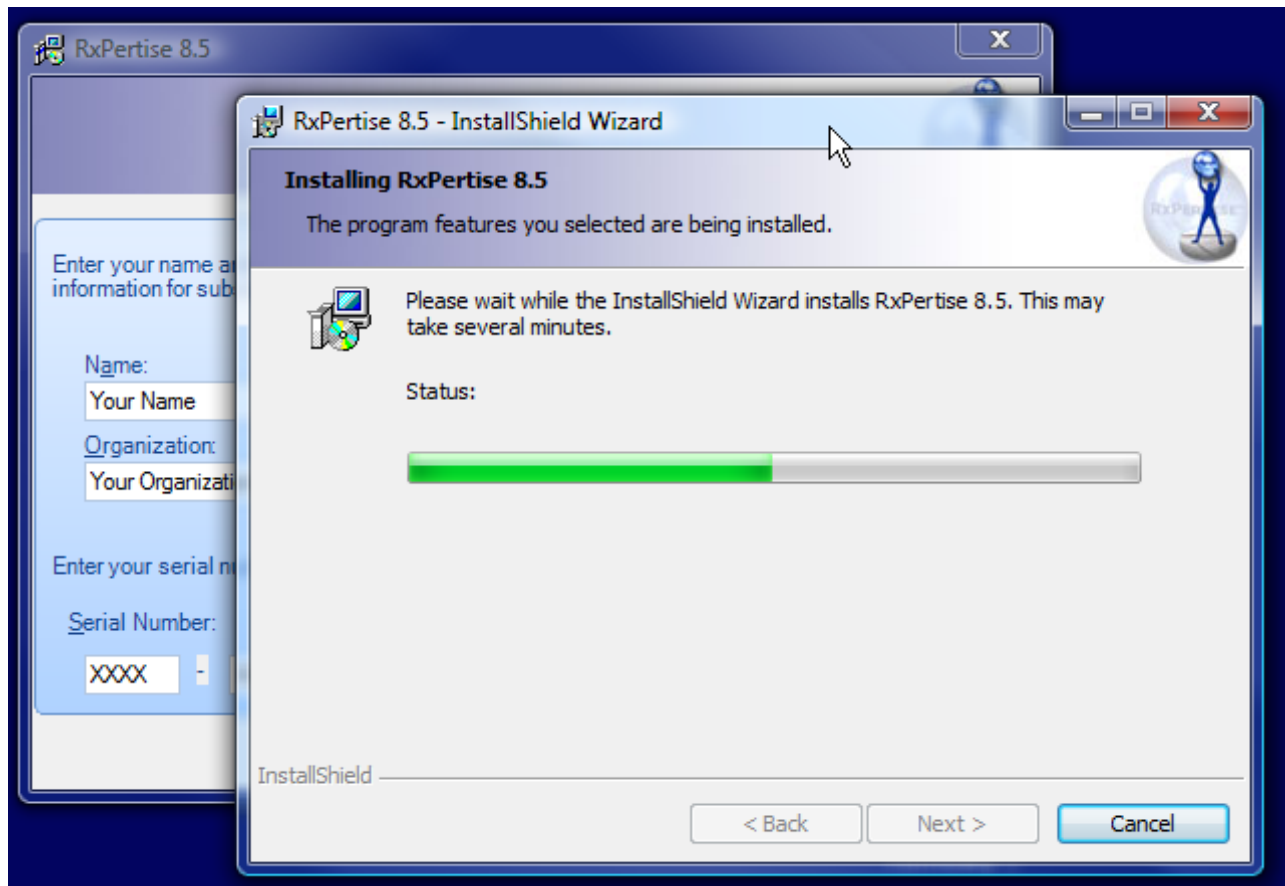
You may now go back to change any previous selections, or click 'Install' to continue. Windows 7 or Windows Vista users may again see a User Account Control prompt similar to this:



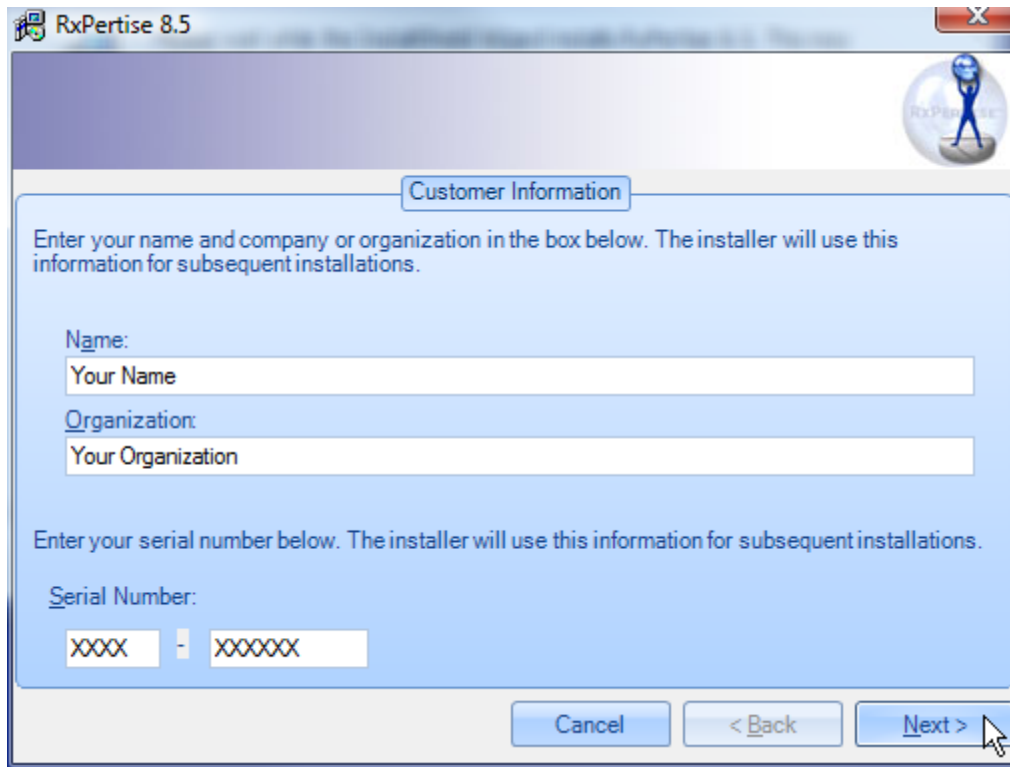
Choose 'Allow' to let the installation program proceed:



In some cases, a second installation window may be hidden from view by the first installation window. If the installation process seems to hang about half-way through, simply drag the status window away from its current position to reveal the second window behind it:

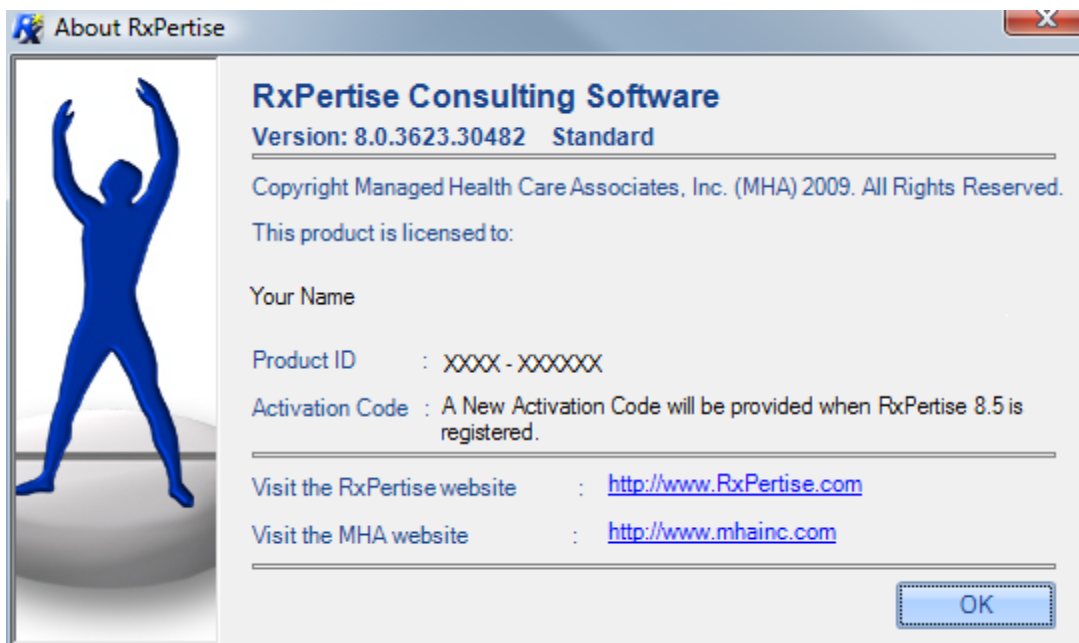


This window will prompt you for your Customer Information:



Enter your Name, Company and Product ID (Serial Number), click 'Next' and the installation will be complete.

If you are a new 8.5 user, your product ID (Serial Number) will have been provided to you by email. If you are an existing RxPertise user, use the same product ID that you have with your current installation of RxPertise, which can be found under Help > About:



Some important items to complete after installing RxPertise™ 8.5:

- Be sure to read the RxPertise™ Help file “What needs to be updated before you perform MRRs.” This lists several customization options that should be done before taking 8.5 out in the field. This pertains to new and existing users.
- Please note that the RxPertise™ 8.5 CD image is a fully-functional evaluation version of our software (with a 30 day expiration date once installed), and also acts as a full installation for upgrading from previous versions as well as starting new with 8.5. This installation package does all three.
- If you have **purchased v8.5 as a new license**, you will have 30 days after RxPertise™ has been installed to register and activate your license. During that time, you will be asked each time RxPertise™ is launched whether you wish to register. If you choose to register, you will be brought to the Registration window to proceed. If you choose ‘Cancel’, you will be reminded of the number of days remaining in your evaluation when RxPertise™ starts, and will be reminded again when RxPertise™ exits. Please make a point of registering your software as soon as possible. Our registration is an on-line, one-step process.
- If you have **received 8.5 as part of our annual maintenance plan**, you will still need to register your license with MHA. RxPertise 8.5 requires a **different activation code** than with previous versions, so even if you are an existing user, and current on RxPertise Annual Maintenance, you will have 30 days to register your license with us. However, we have provided an on-line, one-step activation process for your convenience. This is explained later in this installation manual.
- If you are **evaluating** v8.5, you will have 30 days (from the day of initial installation) to explore our fully-functional program, by which time the software will need to be ordered/registered or uninstalled from the computer, to comply with the evaluation agreement that you signed when ordering the evaluation version. When evaluating v8.5, choose ‘Cancel’ when prompted to register the software. All features of RxPertise™ are functional in the evaluation version.
- Once installation is complete, a shortcut will appear on your Windows Desktop. Depending upon your computer’s settings, the program may also appear on your Start menu or as a quick-launch. With v8.5, the Desktop shortcut will be your primary launching mechanism for the software.
- Please refer to the Help file for detailed instructions on how to upgrade your RxPertise™ 6.x, 7.x or 8.0 database into the new 8.5 format.

3. Medication Updater, Monograph/Interaction Updater, Formulary Checker

RxPertise 8.5 includes a Medication database which stores NDC numbers and related data, a Monograph database to provide clinical monograph and interaction information and a Formulary database to help verify coverage of medications during the MRR process. Database updater programs are provided to keep the information as current as possible and they are accessible at our website, www.rxpertise.com. **Note that, in order to have access to flagged Black Box medications and complete Medication Monograph/Interaction data, both the Medication Updater and the Monograph/Interaction Updaters must be used on an ongoing basis.** The Formulary Database Updater may be installed as an option without any effect on the availability of Monograph data. Both evaluation and registered users will have access to all of these databases.

To be sure that you have the latest available data, which is generally updated monthly, these Data Updates are best obtained via a direct download from the RxPertise website. Click on the 'Data Updates' button to access our web site directly:



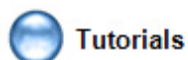
Our web site will provide not only the update files, but also a set of instructions for the installation of each updater.

4. Video Tutorials

RxPertise™ 8.5 comes equipped with over 5 hours of video tutorials to assist you in the ease of operation of our software. Our tutorials are now available for viewing from our web site as well as installed directly on your hard drive and accessed via a Desktop shortcut.

A. Viewing the video tutorials

Version 8.5 tutorials are available for viewing directly from our web site, and do not need a registered version of RxPertise to be viewed. Windows Media Player is the platform used, which is typically pre-installed on most Windows machines. Click on the Tutorials button on our home page at www.rxpertise.com to access the full list:

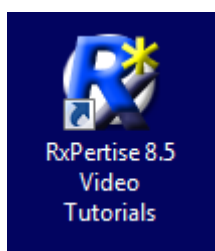


B. Installing the video tutorials to your computer

This will be an easier way to access our tutorials, and does not require an active internet connection. Click on Video Tutorials to install these directly to your hard drive:

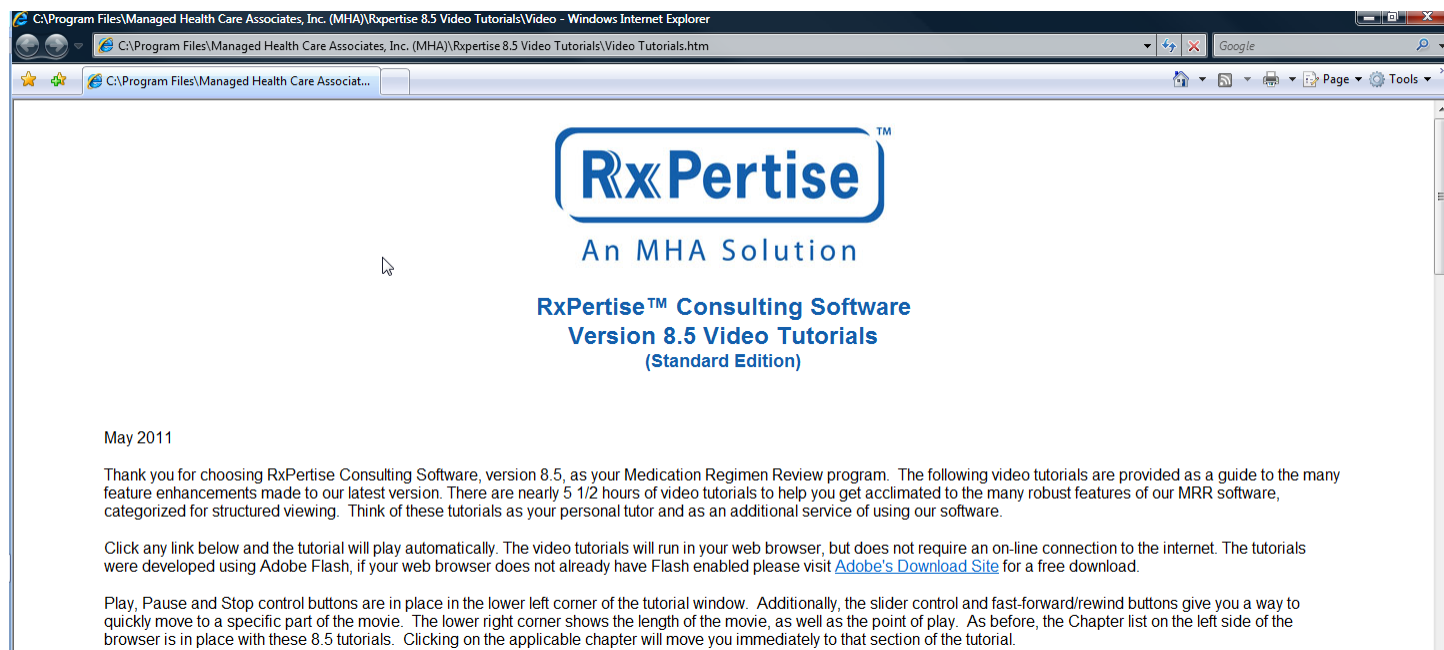


Follow the prompts when the installer begins. At the end of the installation, a new RxPertise Desktop shortcut will be displayed:



C. Playing the video tutorials from your hard drive

Launch the Desktop shortcut displayed above. Your web browser will open (note: you do not need to be connected to the internet to view our tutorials this way):



Each of the movies is present as a hyperlink (underlined text). Click on the appropriate movie, your browser will open, and the movie will automatically start:

Introduction

Introduction A quick overview of the controls used in our video tutorials.

[Click here for Introduction](#) (1 minute)

Existing RxPertise clients

What's Changed, Part 1 Reviews the new monograph and interaction capabilities in 8.5.

[Click here for Part 1](#) (11 minutes)

What's Changed, Part 2 Reviews the global improvements made, such as tooltips display function, datagrid customization, backup/restore enhancements, Import/Export improvements, consultant profile, pharmacy data import changes, new spellchecker, and the physician merge function.

[Click here for Part 2](#) (8 minutes)

What's Changed, Part 3 Reviews the enhancements made to Resident-level data in RxPertise, such as the new Resident full-view display, updated Creatinine Clearance calculator, Telephone Order comments function, Black Box Warning tracking, and other related medication order enhancements.

[Click here for Part 3](#) (7 minutes)

What's Changed, Part 4 Reviews the enhancements made to v8.5 Reports/Graphs.

[Click here for Part 4](#) (9 minutes)

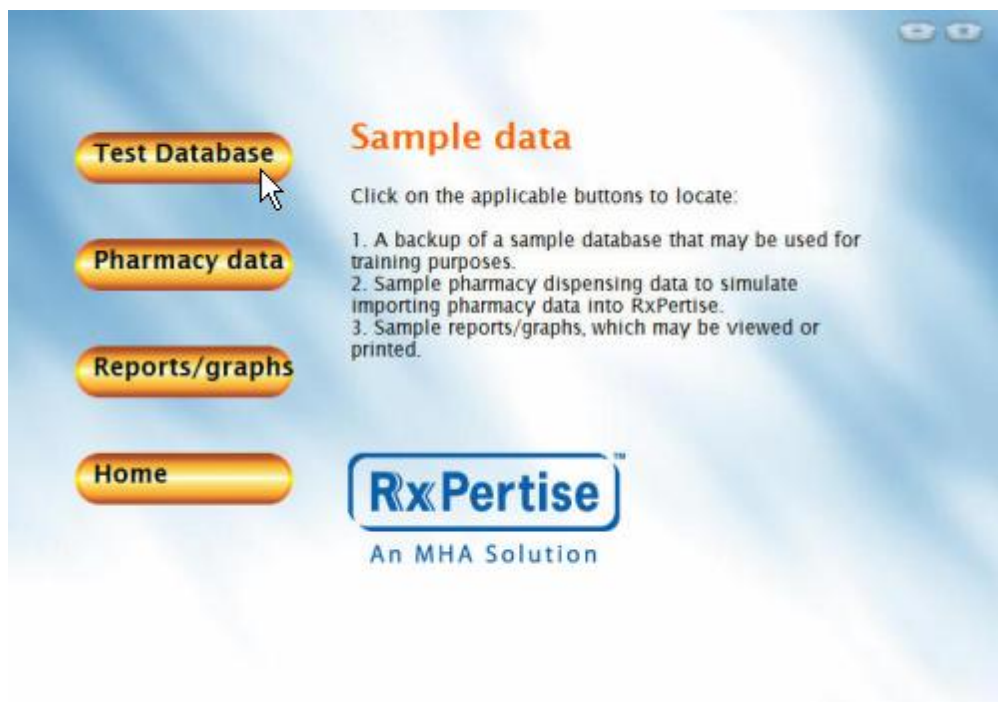
5. Samples Included

A. Sample Database

After 8.5 is installed, you have the option to restore a sample database backup file to a new database. The sample database backup file may be found by clicking on the Sample Data menu button:



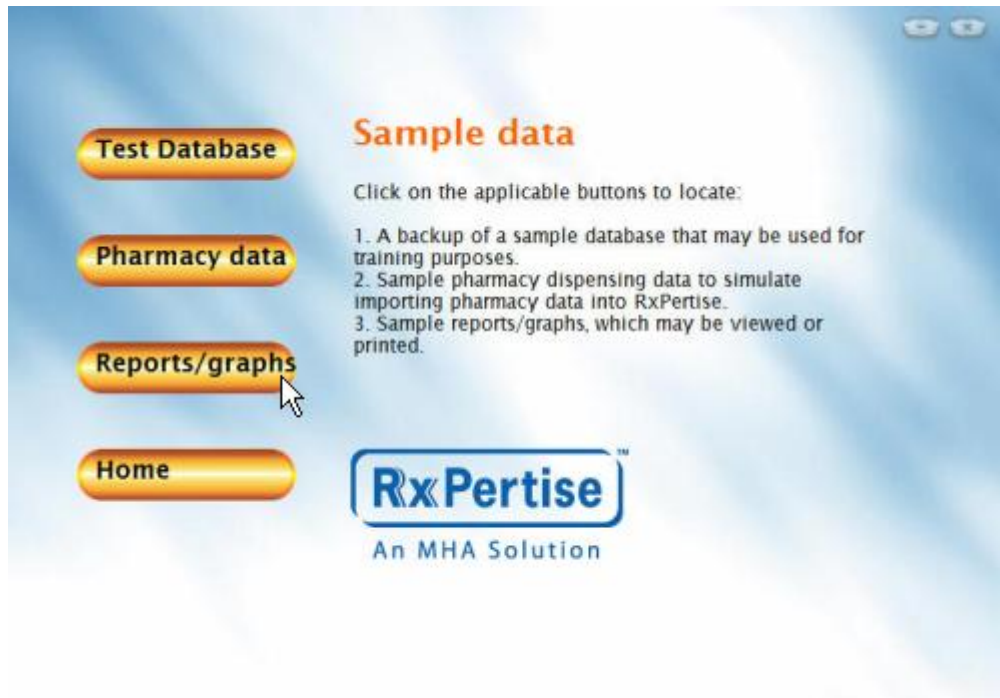
Followed by clicking on the Test Database button:



This will open an Explorer window to display the specific backup file and its location. Restore this file in RxPertise via the Startup window to a new database. If you are new to RxPertise, our video tutorials will be a great resource.

B. Sample Reports/Graphs

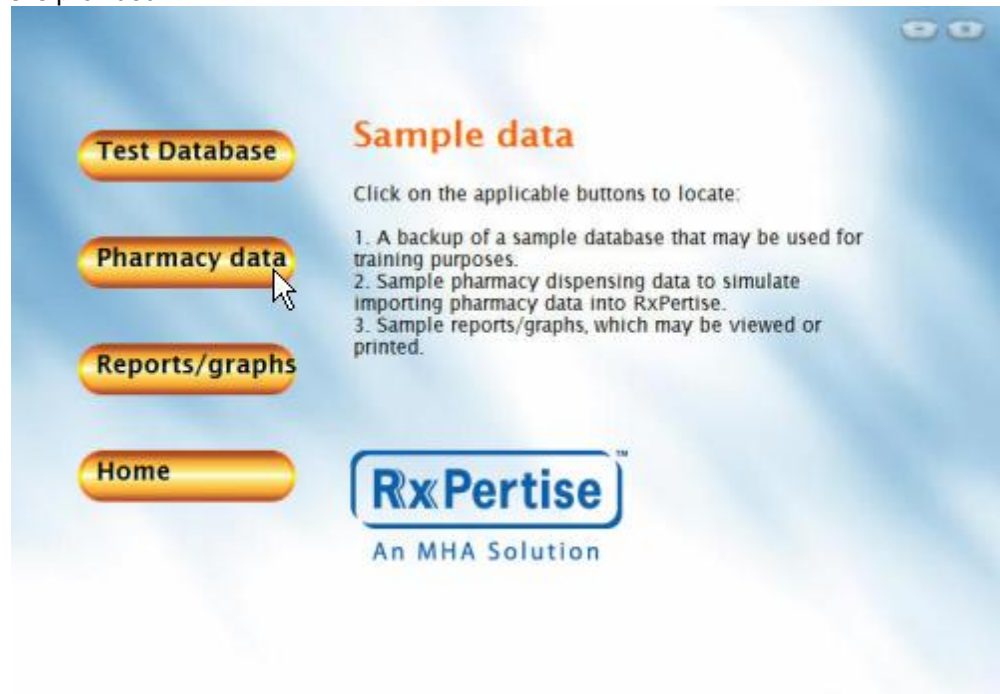
Click on the Reports/graphs button to access our PDF file of the RxPertise™ 8.5 sample reports/graphs (the same file that is on our web site for download):



Your default program (typically Adobe Reader) will launch and open this file for viewing and printing.

C. Sample pharmacy data to work with sample v8.5 Test Database

Click on Pharmacy Data to locate the folder where sample dispensing data from each of the supported pharmacy dispensing systems is provided.



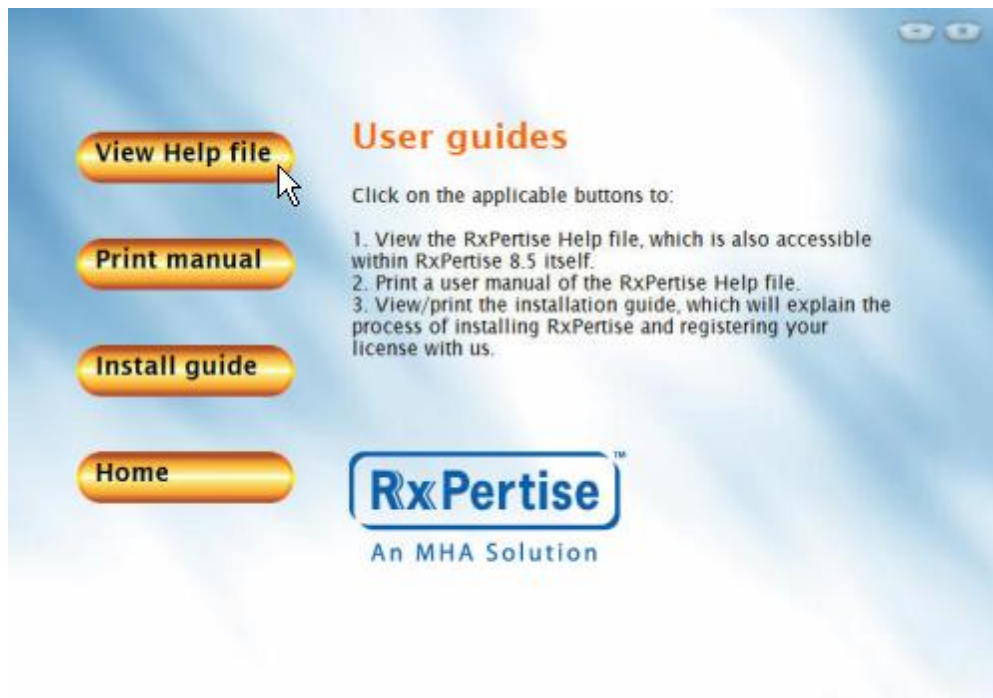
6. RxPertise™ 8.5 Help

Help File:

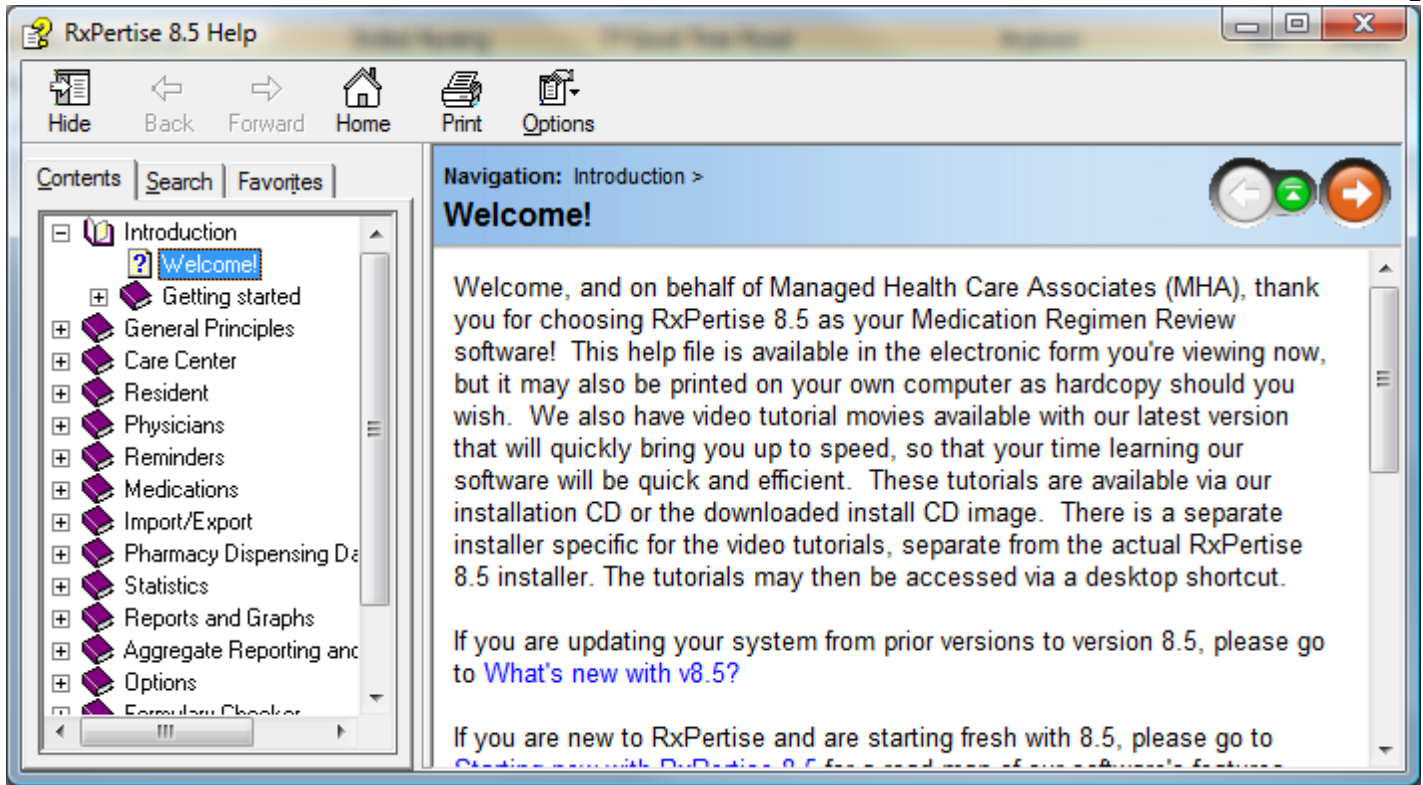
RxPertise™ 8.5 has a detailed Help file which was automatically installed on your hard drive during installation. The same Help file may be found on the installation image, and may be accessed without installing 8.5. You may find it by clicking on 'User Guides':



And then 'View Help File':



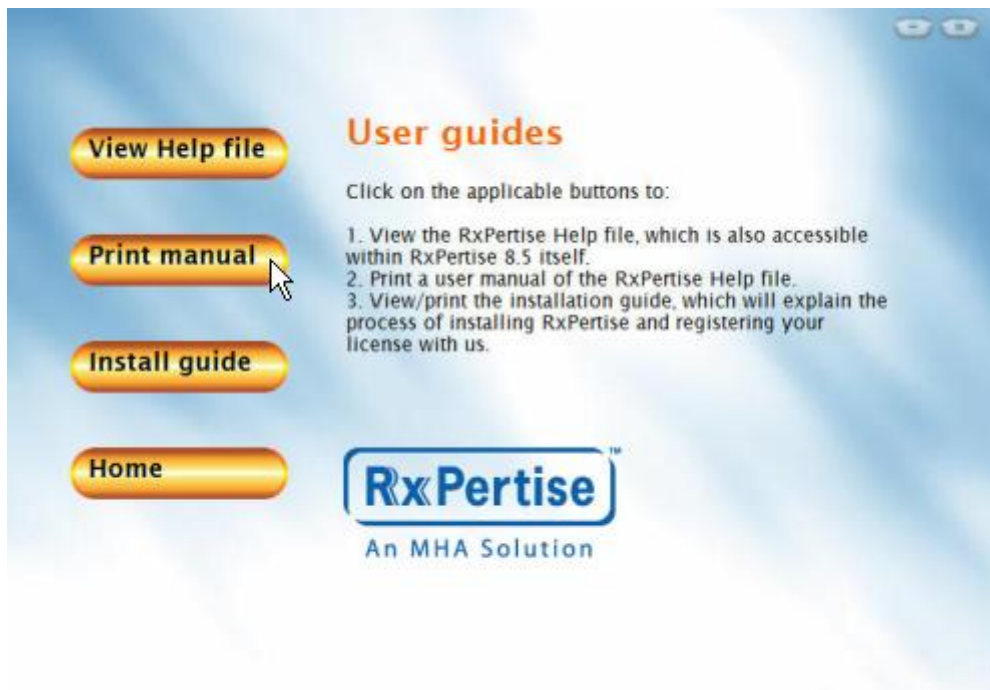
The Help file will launch automatically:



This is the same Help file that may be accessed within RxPertise by clicking on Help > RxPertise Help.

Printable Help Manual:

RxPertise™ 8.5 also has a 288 page manual version of the Help file that may be read and, should you desire a hardcopy, printed with Adobe™ Reader. This file is also located within the 8.5 CD, by clicking on Print Manual:

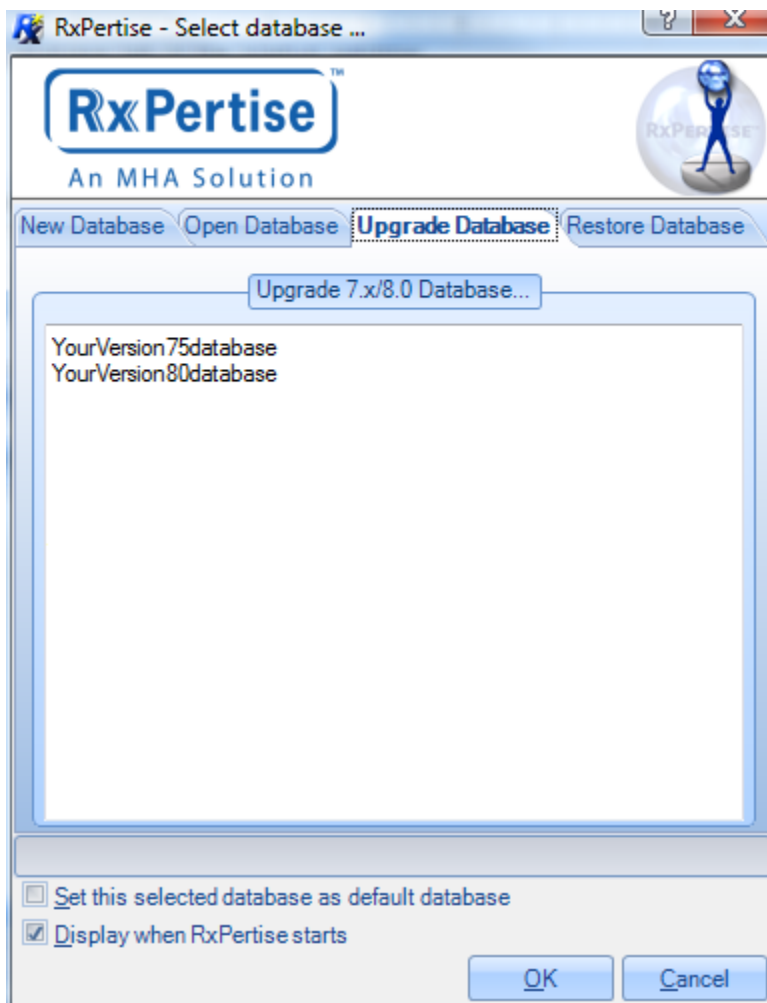


7. Upgrade instructions for 6.x, 7.x & 8.0 users

As mentioned above, installation of 8.5 will not uninstall previous versions of RxPertise™. Please note that RxPertise™ 6.x, 7.x and 8.0 may remain on the same machine to allow you to acclimate gradually to the new version and its many enhancements, at which point previous versions may be manually uninstalled from the Windows Control Panel.

Version 7.x and 8.0 users

For the vast majority of our clients that are already running 8.0, and have upgraded to 8.5, your 8.0 databases will be found under the Upgrade Database tab of the Startup window:



Please note: The upgrade process is irreversible, and from that point forward, the database may only be read by version 8.5. For this reason, we provide a backup prompt before you commit. Our video tutorials discuss this in more detail.

Version 6.x users

After installation of 8.5, your 6.x databases will need to be upgraded to the new 8.5 format. This function is done from within an open RxPertise database. Please consult “Upgrading A Version 6.x Database” in the Help file for more details.

8. Registration/Activation Instructions

Each RxPertise™ 8.5 installation is a fully-functional evaluation version of our software.

If you have ordered our software to evaluate it for purchase, please note that the software's functionality will expire 30 days after being initially installed. Please also note that uninstalling/reinstalling the software will not allow an evaluation for more than the original 30 days. After the 30 days, the software must either be registered with an activation code (provided to users who have purchased the software) or uninstalled from the computer. Once MHA receives your order form, the originally installed RxPertise™ version may be used and activated to become a fully licensed version. Any data that you have entered during your evaluation period will be fully usable once registered.

If you are an existing RxPertise™ user and have received 8.5 as part of your annual maintenance plan, **you will still be required to register your 8.5 license**. The activation code for 8.0 will not authenticate, as we are using a newer, more robust registration process. See below for details discussing the on-line registration.

If you have ordered a new RxPertise™ 8.5 license, the same 30 day expiration of the software exists, but you will have these 30 days to register your software with MHA.

Until your license is activated, you will be prompted to register each time you launch RxPertise:



Version 8.5 provides a new on-line activation process. Providing your license is valid, and you are connected to the internet, click on the Activate Online button:



Our activation process will automatically send the necessary information to our server, provide an activation code, and register your license.

Alternatively, you may use our Manual Registration process, which is discussed in detail within RxPertise Help, under the chapter Getting Started. RxPertise™ is registered to a single computer, and multiple pharmacists may use that license (though obviously one at a time). Each RxPertise™ installation packet comes with a Product ID code.

9. Support policy

Effective with the release of RxPertise™ 8.5, the support policy is as follows:

Technical support for resolving operating system, user-caused, and program-caused issues related to RxPertise™ is included in the cost of the software license with the purchase of a maintenance plan.

Only the current version of RxPertise™ will be supported. If a user requires technical support for a version no longer supported, and is enrolled in the RxPertise™ maintenance plan, upgrading to the latest version should be the first course of action. If the user is not enrolled in the RxPertise™ maintenance plan, and requires assistance with a previous version, this service will be offered at a \$250/hour (1 hour minimum) charge.

Licensed end-users may use one of two support methods for seeking help:

1. Email support requests to us by using our address support@rxpertise.com.
2. A toll free phone number (888-223-3022) will be provided for direct assistance. Support via phone is available from 9AM – 8PM Eastern, Monday through Friday, and excluding major holidays.

MHA may require the actual RxPertise™ database to properly diagnose/correct the reported problem. The end-user may be required to email or electronically transfer requested files when indicated. Additionally, remote login access to the computer in question may be required by MHA, in order to best diagnose the issue and resolve the support incident. This will require the user to have internet access.

The end-user assumes all responsibility for safeguarding any patient-specific data that may be sent in order to diagnose and treat a problem. Managed Health Care Associates (MHA) does not act as the business associate or the covered entity of any facility. Returned databases will be deleted by MHA once the issue has been resolved, and a confidentiality disclaimer will accompany each email attachment.

Technical support does not include issues involving the end-user's operating system or hardware configuration. The end-user is totally responsible for any loss of data that may arise if additional software programs are installed on the computer after RxPertise™ has already been installed. Additionally, the end-user is responsible for backing up all necessary program files on a separate drive system to avoid loss of data.

For more enhanced support (ex. rebuilding a database after a hard drive crash or viral infection), MHA reserves the right to charge a support fee, agreed to and paid by the end-user, depending upon the nature of the service issue.