IDEXX Cornerstone*

Electronic Medical Record and Whiteboard Setup

8.3 *Participant Workbook*

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IDEXX Computer Systems

One IDEXX Drive

Westbrook, Maine 04092 USA

idexx.com/cornerstone

Electronic Medical Records and Whiteboard Setup
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Introduction

Course Description

This two-session course (8 hours) has been designed for key project leaders who are moving their practice towards becoming a chartless practice or setting up medical note templates or the Electronic Whiteboard window for the first time. During this course, the setup of the practice's electronic medical records (EMRs) and the Electronic Whiteboard will be completed in its real data files.

Prerequisites

- The current version of the IDEXX Cornerstone* Practice Management System installed at the practice.
- Basic Cornerstone navigation skills.
- Access to set up Cornerstone features, which means security for setting up electronic medical records.
- Basic Cornerstone setup knowledge of invoice items, departing instructions, and prescription instructions.

Getting Started

Throughout this training, you will be working in your own practice's database.

This course is most effective if you work at a Cornerstone workstation while following along in the participant workbook and completing the exercises.

Training Content

Content of the course includes:

- Patient Visit Overview and Technology Overview
- Medial Record Strategy
- Reason for Visit Alerts and Documents
- User-Defined Prompts and Classifications—Client and Patient
- Prescription Instructions, Departing Instructions, Problems, and Diagnostic Codes
- Invoice Item Setup
- Vital Signs Setup
- Electronic Whiteboard Setup
- Medical Notes and Correspondence
- Electronic Medical Records Default Settings

These icons are used throughout the training to provide additional information:

Important Information: Provides critical information about the topic or procedure. Read this information carefully.

Note: Provides additional information about the topic or procedure.

tip **Tip**: Provides helpful information about the topic or procedure.

When you see this image placed below a lesson name, it indicates that video snippets are available online at IDEXXLearningCenter.com for topics related to this lesson.

Patient Visit Work Flow and Technology Overview

Patient Visit Work Flow and Technology Overview

You'll learn these important concepts within this section:

- **Patient Visit Work Flow**—Understand the steps in the IDEXX Cornerstone* Practice Management System work flow.
- **Technology Overview**—Recognize technology that will be useful for a chartless practice.

Patient Visit Work Flow

The diagram on the next page illustrates Cornerstone work flows, which have the following steps.

Preventive Care and Outpatient (red line)

- Step 1—Check-in
- Step 2—Exam, Vital Signs, and Medical Notes
- Step 3—Charge and Procedure Verification
- Step 4—Final Step—Checkout

Surgery and Hospitalized (black line)

- Step 1—Check-in
- Step 2—Exam, Vital Signs, and Medical Notes
- Step 3—Charge and Procedure Verification
- Step 4—Recommended Treatments and Costs
- Step 5—Admit and Patient Orders
- Step 6—Procedures
- Step 7—Post Procedures
- Step 8—Final Step—Checkout

Patient Visit Work Flow

This diagram illustrates key steps in the IDEXX Cornerstone* Practice Management System work flow for the two main types of patient visits.

Step 1: Check-in

- Appointment Scheduler
  - Alerts
  - Documents
- Compliance alerts
- Correspondence
  - Consent forms
  - Client handouts
  - Pet ID cards/collars
- Check-in Report

Step 2: Exam, Vital Signs, and Medical Notes

- Daily Planner
- Medical note
  - Exam medical/SOAP note
  - Optional: Invoice items pane
    - Invoice items/smart groups
    - Decline to history option
    - IDEXX SmartLink* laboratory and imaging requests

Step 3: Charge and Procedure Verification

- Patient Visit List
  - Invoice items/smart groups
  - Prescriptions
  - Decline to history option
  - Vaccines and rabies tags
  - IDEXX SmartLink laboratory and imaging requests
- Daily Planner—Diagnostics

Step 4: Recommended Treatments and Costs

- Estimates/client signature/ finalize
- Payment/deposit
- Update patient status/ reasons for visit
  - Correspondence
    - Consent forms
    - Client handouts

Step 5: Admit and Patient Orders

- Admit—add to Whiteboard/Patient Orders windows
  - Add patient orders
  - Transfer: Whiteboard Patient Visit List
    - Decline to history option
- Medical note

Step 6: Procedures

see options

Whiteboard and Medical Notes

- Update Whiteboard/ Patient Orders
- Patient treatments/ vital signs
- Medical note

Medical Notes Only

Step 7: Post Procedures

- Prescriptions
- Discharge instructions
- Update patient status

Final Step: Checkout

- - - - Surgery and Hospitalized

. . . . . Preventive Care and Outpatient

Technology Overview

IDEXX SmartLink* technology allows a practice to make a diagnostic request from the IDEXX Cornerstone* Practice Management System, and at the same time charge the client. The request is automatically submitted to the in-house laboratory, reference laboratory, or digital imaging equipment without reentering the client and patient information, and then the results are transferred back to Cornerstone and into the patient file.

IDEXX SmartLink integration offers the superior advantages of captured missed charges and improved efficiencies, including the reduction of client and patient ID errors.

IDEXX SmartLink In-House Laboratory

Enter an in-house laboratory request in Cornerstone—automatically, the client is billed, and the laboratory request and information transfers to the analyzer. Results are downloaded into Cornerstone patient history.

IDEXX SmartLink Reference Laboratory

Enter a reference laboratory request in Cornerstone—automatically, the client is billed, and the laboratory request and information is printed on a LabREXX* form and sent with the sample. Results are downloaded into Cornerstone patient history.

IDEXX SmartLink Digital Imaging

Enter an imaging request in Cornerstone—automatically, the client is billed, and the imaging request and information automatically transfers to the IDEXX digital imaging equipment. Results are downloaded into Cornerstone patient history.

Additional Integrated Features

IDEXX VetConnect* PLUS

IDEXX VetConnect PLUS is a powerful web-based tool that lets you view and compare IDEXX in-house diagnostics and IDEXX Reference Laboratories data side by side. VetConnect PLUS works within the standard Cornerstone work flow for viewing results and has an enhanced format for viewing, comparing, and graphing result data. You can also visit vetconnectplus.com to view your results in a browser. Results are downloaded into Cornerstone patient history.

IDEXX Pet Health Network* Pro

IDEXX Pet Health Network Pro offers convenient online tools and services for client communication and education that strengthen the connections between your practice and your clients. Features include personalized reminders, automated communications, Petly* personalized pet pages for clients, pet health campaigns, a customizable practice website design, and editable monthly newsletter content.

Signature Capture Device

If your practice has an approved signature capture device, you can immediately have a client electronically sign a correspondence document, estimate, or an XCharge® electronic payment. An approved signature capture device is purchased separately. Signature bookmarks must be added to correspondence documents in order to add client signatures to documents.

XCharge® Payment Solutions

The Cornerstone integrated payment solution also uses electronic signature capture and offers a simple and secure solution for credit card processing initiated from Cornerstone. The third-party payment processing solution available in Cornerstone is XCharge®, developed by Accelerated Payment Technologies™.

Electronic Whiteboard Monitor

A large LCD monitor on the wall in the treatment area allows the Electronic Whiteboard to be very visible to your staff and ensure they are keeping up with patient treatments.

Scanners

Document scanners can be used to add items that cannot be downloaded or attached electronically to the patient's file. Examples include lab results from universities, emergency or referral reports, and new client registration forms.

Barcode Readers

Handheld barcode scanners allow users to scan item for inventory management and at the point of sale.

Speciality Printers

PetDetect Printer*

A simple, affordable, and professional solution to every practice's animal identification needs. This collar printer allows access to the name, cage name, medical information, and other critical data.

Zebra® P110i™ ID Card Printer

Use the printer with existing templates in Cornerstone to print patient ID cards. The P110i delivers consistent, high-quality printing and trusted dependability. The sleek design uses high strength plastics and advanced electronics for reduced size and weight with outstanding performance.

Pet ID Cards and PetDetect* Collars

Improve efficiencies at your practice by using pet ID cards and PetDetect* collars. Use PetDetect collars to aid in pet identification and scan ID cards at check-in for access to client/patient information (approved scanning device is required).

Sample ID Card

(front of two-sided card)

(back of two-sided card)

Sample Collar

PetDetect collars provide positive patient identification.

DICOM® Third-Party Imaging

Import DICOM images into the Cornerstone database for easy viewing on any Cornerstone workstation. Once the image is in the Cornerstone database, access to all features available within the IDEXX-PACS* Imaging Software, including telemedicine, is available. Benefits include the need for only one storage and backup solution versus maintaining separate networks, databases, and backups. Images are stored in the patient's electronic record.

Antech Diagnostics® Module

The Antech Diagnostics laboratory module allows you to order tests online. Results are automatically downloaded from the laboratory once an hour.

LifeLearn® ClientEd Online™

Through a subscription to the LifeLearn ClientEd Online web-based portal, you can experience the added flexibility and convenience of having continually updated articles that can be customized and edited as often as you like, with new articles added regularly.

Section Summary

You learned these important concepts in this section:

- **Patient Work Flow**—Understand the steps in the IDEXX Cornerstone* Practice Management System work flow.
- **Technology Overview**—Recognize technology that will be useful for a chartless practice.

Electronic Medical Records Setup

Medical Record Strategy

You'll learn this important concept in this chapter:

- **Medical Record Strategy**—Identify your practice's medical record strategy.

Medical Record Strategy

One task of a practice is to identify its medical record strategy. You will need to make a decision about your practice's strategy up front. This will drive the configurations and setup.

- Use medical notes only for patient charts.
- Use medical notes for both patient charts and client communication.

Discussion Questions:

- For a patient visit, the following questions should be considered:
  - What medical information is necessary or relevant for a medical team?
    - For legal purposes?
    - What medical notes are relevant to the client?
    - In what format should information be given to the client for them to understand the care given and increase the perception of value?
    - What documents can you link to the diagnosis?
- Which features do you use to support your most frequent patient care routines? Some examples are listed below.

Patient Visit Type	Preventive Care
Patient Alert	Compliance Alert
Reason for Visit	Adult Preventive Care—Canine
Client Correspondence	Current Lifestage Education
Medical Note Template	Preventive Care—Adult Canine
Diagnosis with Linked Documents	Dental Grade 3 with LifeLearn® Dental Disease handout attached
Smart Group	Preventive Care Group
Departing Instructions	Our preventive care philosophy includes exams, diet, and exercise.

Complete this medical record strategy table:

Patient Visit Type	Preventive Care
Patient Alert	
Reason for Visit	
Client Correspondence	
Medical Note Template	
Diagnosis with Linked Documents	
Smart Group	
Departing Instructions	

Chapter Summary

You learned this important concept in this chapter:

- **Medical Record Strategy**—Identify your practice's medical record strategy.

User-Defined Prompts and Classifications—Client and Patient

You'll learn these important concepts in this chapter:

- **User-Defined Prompts for Clients and Patients**—Create a user-defined prompt.
- **Classifications for Clients and Patients**—Create a classification.

User-Defined Prompts for Clients and Patients

Prompts allow you to customize Cornerstone* software to store information that is gathered for a new client or patient. A user-defined prompt can be set as an alert to bring certain information to the attention of your staff. You can further customize alerts by assigning them a color. It is also possible to require that certain information be put into Cornerstone for every client or patient.

You should never store sensitive client data, such as credit card numbers or Social Security numbers, in Cornerstone. If you want to use Cornerstone to process payments in a manner that is PCI PA-DSS (Payment Credit Industry Payment Application Data Security Standard) certified, be sure to use one of our approved Cornerstone payment processing integrations.

To add a user-defined prompt:

1. On the **Controls** menu, select **User Defined Prompts**. Click the **Client** tab or the **Patient** tab.
2. Click **New**. The applicable Prompts setup window opens.
3. In the **Prompt** box, type the prompt text. This is the text that will appear in the Client Information or Patient Information window.
4. In the **Data type** area, select the data type, which will determine how the prompt will be answered:
   - **Character**—Answered by entering alphanumeric characters (standard text).
   - **Number**—Answered by entering numeric characters (only numbers accepted).
   - **Yes/No**—Answered by selecting **Yes** or **No** in response to a question prompt.
   - **List**–Answered by selecting the information from a prepared list. To set up a list, select the **List** data type and then in the **List** area, click **New**. In the **Prompt List** box, type an answer to add to the list and click **OK**.
5. To use this prompt as an alert, select the **Client Alert** or **Patient Alert** check box.
6. For patient prompts, to display this prompt as an alert on the Electronic Whiteboard windows, select the **Whiteboard Alert** check box.
7. Optional: To select a color for the alert text, click the colored square and then select a color or define a custom color.

   If designating a patient prompt as both a patient alert and an Electronic Whiteboard alert, the selected color will be used for both types of alerts.
8. If you want the answer to this prompt to be required when the record is completed, select the **Required** check box.
9. Click **OK**.

   If you do not want a prompt to appear, in the **Status** area, select **Inactive**.

   tip When a prompt is set as an alert, the alert will appear when accessing the patient's record in various windows in the Cornerstone* software (based on the practice's default settings).

Patient Alert Examples	Client Alert Examples
Allergic to:	Preferred Doctor
Vaccine reaction to:	Client Alert
Medical Alert	Email Address
Patient Alert	Driver's License
Chart Status	Employer

Classifications for Clients and Patients

Classifications allow you to sort lists and print reports by a specific classification. These classifications can be set up as alerts, including Electronic Whiteboard alerts. Patient classifications can also be used to classify your patient types and manage data and criteria when using the Compliance Assessment Tool*.

To add a classification:

1. On the **Controls** menu, select **Classifications**. Click the **Client** tab or the **Patient** tab.
2. Click **New**. The applicable Classification Setup window opens.
3. In the **Description** box, type a description for the classification.
4. If you want an alert to appear when the record for this type of client or patient is accessed, select the **Client alert** or **Patient alert** check box.
5. For patient classifications, if you want this classification to display as an alert on the Electronic Whiteboard windows, select the **Whiteboard alert** check box.
6. For client classifications:
   - If you want this type of client to receive reminders, select the **Send reminders** check box. This check box must be selected if you want clients with this classification to receive reminders.
     Optional: You do not have to select **Send reminders** for client classifications at this time. After you set up your client classifications, you can print an Initial Client Setup Report to help you decide where to apply the send reminders option to client classifications based on your reminder strategy.
   - If you do not want clients in this classification to receive statements, make sure the Send statements check box is cleared.
7. Click **OK**.

Classifications are used on the Patient Clipboard* window, as well as with the features in the table below.

Patient Classification	Client Classification
Client/Patient Master Report	Client Master Report
Whiteboard Alerts	Generating Reminders
Patient Alerts	Printing Statements
Compliance Assessment Tool*	Client Alerts
	Petly* Communication

Chapter Summary

You learned these important concepts in this chapter:

- **User-Defined Prompts for Clients and Patients**—Create a user-defined prompt.
- **Classifications for Clients and Patients**—Create a classification.

Reason for Visit Alerts and Documents

You'll learn these important concepts in this chapter:

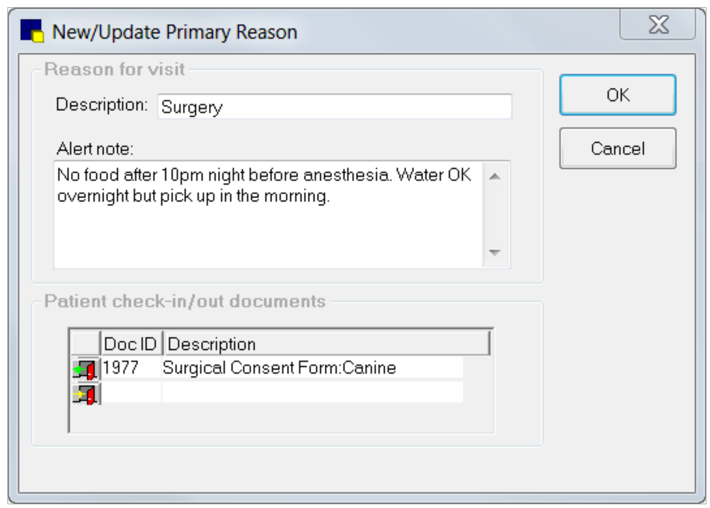
- **Reason for Visit**—Verify and create reasons for visit.
- **Secondary Reason for Visit**—Verify and create secondary reasons for visit.
- **Reason for Visit Display**—Set up reasons for visit with color codes to customize the display of reasons for visit.

Reason for Visit

Reasons for visit are covered during the defaults phase of your training with a decision maker. At the time of completing the Appointment Scheduler setup, it is likely that the reasons for visit selections will already be set up.

To add or update a reason for visit:

1. On the menu bar, select **Controls > Reason for Visit**.
2. In the **Primary reason for visit** area, click **New** to add a new primary reason or double-click an existing reason to update it. The New/Update Primary Reason window opens.
3. In the **Description** box, type a name for the reason for visit.
4. Optional: In the **Alert note** box, type a note that will appear as an alert when this reason for visit is selected.
5. Optional: In the **Patient check-in/out documents** area, link a document to print when the patient is checked in or out. If the icon to the left of the **Doc ID** column has a yellow arrow pointing to the right, the document prints at check-in. If a green arrow points to the left, the document prints at checkout.
6. Click **OK**, and then click **Close**.



Secondary Reason for Visit

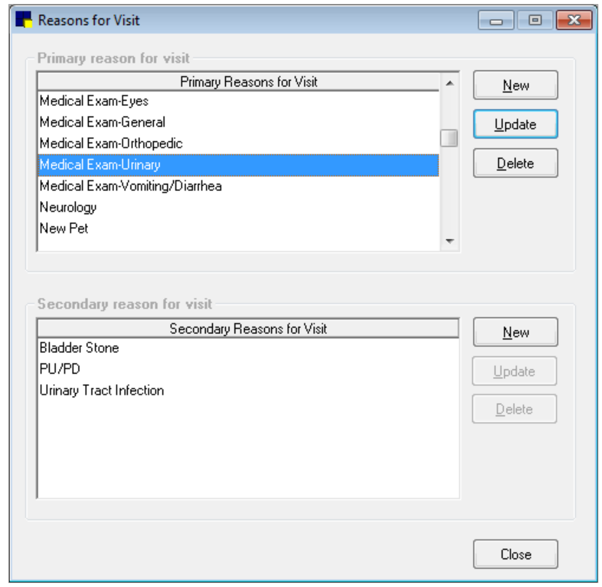
The reason for visit feature allows for both primary and secondary reasons for visit, allowing you to provide staff with more information on the patient's visit. Most commonly, the primary reason would be used to indicate the general type of visit, and the secondary reason would be used to provide more detail on the specific problem or procedure. For example, if the primary reason is Surgery, the secondary reason might be spay/neuter, hip replacement, cruciate, or orthopedic.

To add or update a secondary reason for visit:

1. On the menu bar, select **Controls > Reason for Visit**.
2. In the **Secondary reason for visit** area, click **New** to add a new secondary reason or double-click an existing reason to update it.
3. In the **Add/Update Secondary Reason for Visit** box, type a brief identifying name for this secondary reason (for example, cruciate, glucose curve, or foreign body ingestion).
4. Click **OK**, and then click **Close**.

The primary and secondary reasons for visit are not associated with each other in the software.

tip
- To avoid staff having to select from a long list of secondary reasons, you may want to set up a predefined list with only the most common secondary reasons and instruct staff to type other secondary reasons as needed. A secondary reason can be typed on the fly at the time of use, but the primary reason must be selected from your predefined list.
- The secondary reason for visit shows clearly on the Electronic Whiteboard main view, along with the color dot for the primary reason for visit.



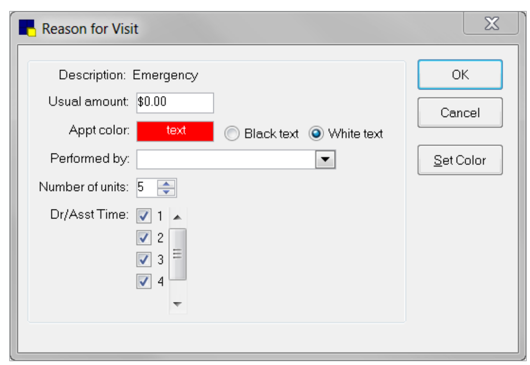
Reason for Visit Display

Colors display on the Appointment Scheduler window and on templates based on the reason for visit selected when the appointment was set up.

tip Using different colors for your reasons for visit will make the schedule easy to read at a glance. The primary reason for visit color will appear on the Electronic Whiteboard main view.

To customize the reason for visit display:

1. On the menu bar, select **Controls > Appointment Scheduler > Reason for Visit**.
2. Select the reason for visit and click **Update**.
3. On the Reason for Visit window, set the following parameters:



   - **Appt color**—To use a different color, double-click the existing color or click **Set Color**. Select a color and click **OK**.
   - **Performed by**—Select the staff member who usually performs this type of appointment.
   - **Number of units**—Enter the default number of time units for how long this type of appointment usually takes.
   - **Dr/Asst Time**—Select the check boxes for the number of time units needed to perform the service. For example, a recheck appointment may be scheduled to take 20 minutes, but the doctor will be with the patient for only 10 minutes. These time units appear on the Schedule for Today window with an X next to the selected time slots, indicating that a staff member is scheduled to attend to the patient during that time period. You can select check boxes without assigning a staff member to the reason for visit.
4. Click **OK** to save the reason for visit information.

Chapter Summary

You learned these important concepts in this chapter:

- **Reason for Visit**—Verify and create reasons for visit.
- **Secondary Reason for Visit**—Verify and create secondary reasons for visit.
- **Reason for Visit Display**—Set up reasons for visit with color codes to customize the display of reasons for visit.

Prescription Instructions, Departing Instructions, Problems, and Diagnostic Codes

You'll learn these important concepts in this chapter:

- **Prescription Instructions**—Create prescription instructions.
- **Departing Instructions for Patients**—Create departing instructions.
- **Problem List**—Create a problem list for common ailments and issues.
- **Diagnostic Codes**—Create diagnostic codes for entering information in patent records.

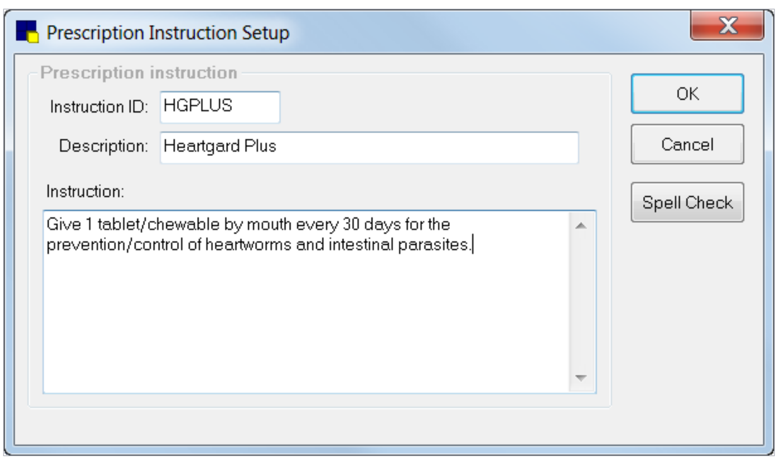
Prescription Instructions

Use prescription instructions to provide clear and consistent dosing instructions to clients. Prescription instructions can be linked to pharmacy items to increase efficiency when filling out a pharmacy label, or staff can access a list of prescription instructions when creating a label.

Set up prescription instructions now and learn how to link them to invoice items in the next chapter.

To add or edit a prescription instruction:

1. On the **Lists** menu, select **Prescription Instructions**.
2. Click **New** to add a new prescription instruction or double-click an existing instruction to update it. The Prescription Instruction Setup window opens.



3. In the **Instruction ID** box, type an ID (up to 7 characters) for the prescription instruction.
4. In the **Description** box, type a description for the prescription instruction.
5. In the **Instruction** area, type the prescription instruction text. You can edit the instruction when prescribing the medication.
6. Click **Spell Check** to review your departing instruction for spelling errors.
7. Click **OK**, and then click **Close**.

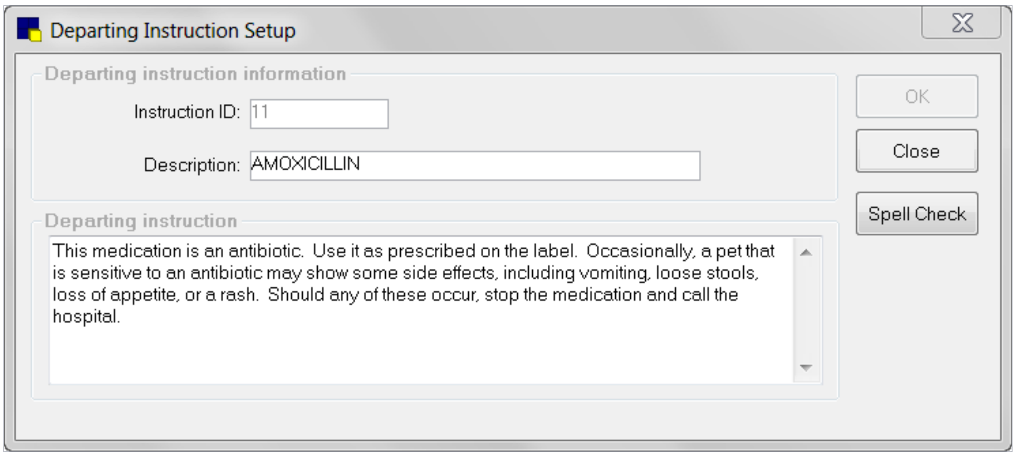
Departing Instructions

Use departing instructions to explain the care of an animal after treatment, after surgery, or after administering medications or vaccinations. You can also use these educational paragraphs to recommend needed services and to advise when a return visit is necessary.

Set up departing instructions now and link them to invoice items in the next chapter. Invoicing a linked item automatically prints the departing instruction on the invoice.

To add or edit a departing instruction:

8. On the **Lists** menu, select **Departing Instructions**.
9. Click **New** to add a new departing instruction or double-click an existing instruction to update it. The Departing Instruction Setup window opens.



10. In the **Instruction ID** box, type an ID (up to 7 characters) for the departing instruction.
11. In the **Description** box, type a description for the departing instruction.
12. In the **Departing instruction** area, type the departing instruction text. You can edit the instruction during invoicing.
13. Click **Spell Check** to review your departing instruction for spelling errors.
14. Click **OK**, and then click **Close**.

tip Set up a miscellaneous departing instruction to use during invoicing for “special” instructions.

Problem List

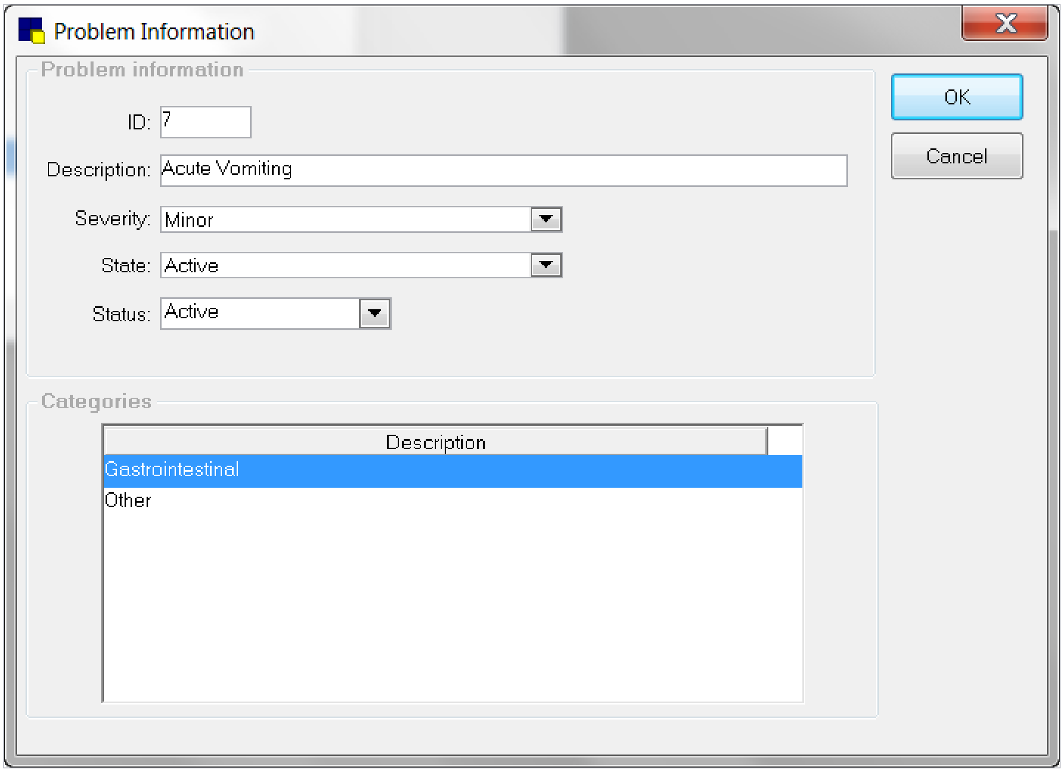
The Problem List provides a list of common medical ailments and issues. You can use this list when you enter medical notes on the patient record.

To add or edit a problem category:

1. On the **Controls** menu, select **Problems > Problem Categories**.
2. Click **New** to add a new category, or double-click an existing category to update it. The Problem Category Information window opens.
3. In the **Description** box, type an identifying name for this problem category.
4. Click **OK**, and then click **Close**.

To add or edit a problem on the Problem List:

1. On the **Controls** menu, select **Problems > Problem List**. The Problem List window opens.
2. Click **New** to add a new problem, or double-click an existing problem to update it. The Problem Information window opens.



3. In the **ID** box, type the ID to use for this problem (for example, an abbreviation of the problem).
4. In the **Description** box, type the description of the problem.
5. From the **Severity** list, select the severity (**Major** or **Minor**) that would most commonly be assigned for this problem. You can change the severity when recording the problem in the patient record.
6. From the **State** list, select the state (**Active**, **Acute**, **Chronic**, **Resolved**, or **Verified Incorrect**) that would most commonly be assigned for this problem. You can change the state when recording the problem in the patient record.
7. From the **Status** list, select **Active** or **Inactive**. (Change the status to Inactive only if you no longer want to use this problem.)
8. In the **Categories** area, select a category for this problem.
9. Click **OK**, and then click **Close**.

Diagnostic Codes

Use diagnostic codes to enter information in a patient's medical history to target and track patients with particular disorders and characteristics. Obesity, infectious diseases, and skin problems are examples of conditions that could have diagnostic codes. You can link documents to a specific diagnostic code.

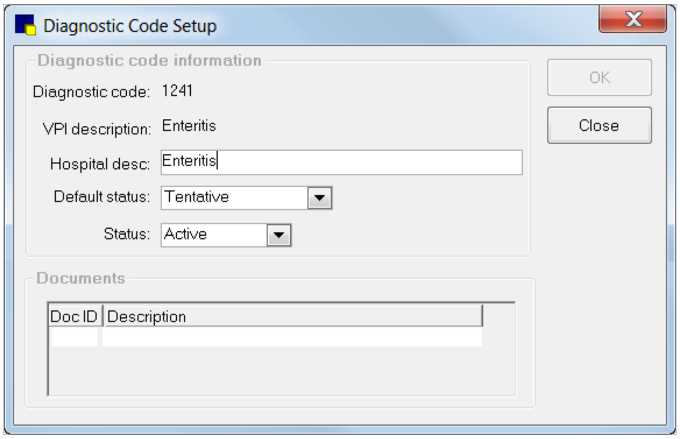
You can also use diagnostic codes with insurance billing. VPI® (Veterinary Pet Insurance®) codes are already set up for you and cannot be deleted. You cannot change a VPI code, but you can update the description.

You can print diagnostic codes on the Check-In Report and Patient History Report. You can also print a Patient Diagnosis Report that includes patients with the same diagnosis.

To add or edit a diagnostic code:

We recommend that you create a new diagnostic code if the description you want to use does not exist. Do not use the hospital description to change the meaning of a VPI code name.

1. On the **Lists** menu, select **Diagnostic Codes**.
2. Click **New** to add a new diagnostic code, or double-click an existing code to update it. The Diagnostic Code Setup window opens.



3. In the **Diagnostic code** box, type the diagnostic code. The code must begin with a letter and cannot exceed ten characters. (You may notice that you have codes with numbers on your system; only VPI codes begin with numbers. By beginning your code with a letter, it will be easy to distinguish the codes created by your practice.)
4. In the **Hospital desc.** box, type the description.
5. From the **Default status** list, select **Tentative** or **Final**. (You can change the diagnosis status when you use it.)
6. From the **Status** list, select **Active** or **Inactive**. You cannot enter an inactive code as a diagnosis. (Change the status to Inactive only if you no longer want to use a diagnostic code.)
7. To link documents to this diagnostic code, in the **Documents** area, double-click in an empty **Doc ID** field to search for and select a document template. Repeat as needed to select all applicable documents to link to this diagnostic code.
8. Click **OK**, and then click **Close**.

Chapter Summary

You learned these important concepts in this chapter:

- **Prescription Instructions**—Create prescription instructions.
- **Departing Instructions for Patients**—Create departing instructions.
- **Problem List**—Create a problem list for common ailments and issues.
- **Diagnostic Codes**—Create diagnostic codes for entering information in patent records.

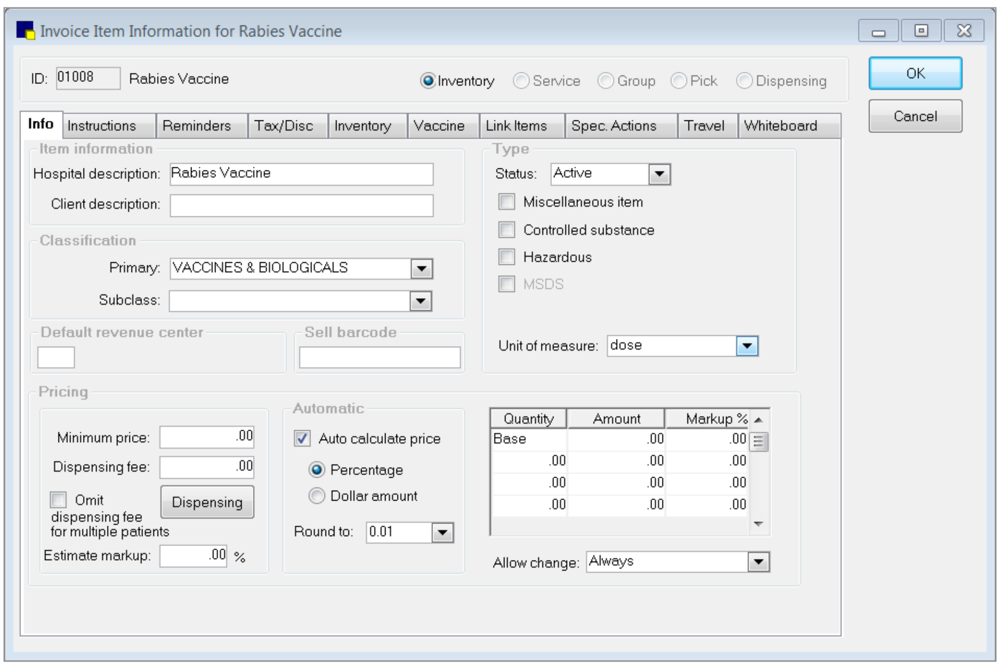
Invoice Item Setup

You'll learn these important concepts in this chapter:

- **Invoice Item Setup Basics**—Learn the basics about the types of invoice items: service, inventory, group, pick, and dispensing.
- **Pick Items**—Create lists to choose from during invoicing.
- **Dispensing Items**—Create and attach multiple dispensing fees to an inventory item. Link a dispensing item to an invoice item.
- **Smart Groups**—Set up smart group codes to take advantage of smart settings. Copy a group to another group.
- **Instructions**—Link departing instructions and prescription instructions to invoice item.
- **Reminders**—Add a reminder that an invoice item generates and the reminders it satisfies.
- **Vaccine Information**—Set up an invoice item to capture vaccine information.
- **Special Actions**—Learn about automatic functions that can occur during invoicing.

Invoice Item Setup Basics

This is an introduction to the types of invoice items. Invoice items are items you sell. They include products and services, as well as common combinations of several items. Single invoice items are set up as service or inventory items. Item combinations are set up as groups, pick items, or dispensing items.



Invoice Item Information window

There are five item types to choose from when you are setting up an invoice item: Inventory, Service, Group, Pick, or Dispensing.

Inventory

Items set up as inventory items are generally in the classifications of:

- Nutritional Items
- Pharmaceuticals
- Supplies
- Skin Care

Service

Items set up as service items are generally in the classifications of:

- Laboratory Testing
- Surgery
- Anesthesia
- Professional Services
- Grooming
- Boarding
- Vaccinations
- Dental Procedures
- Hospitalization
- Radiology

Group

You can combine items that you often invoice at the same time into a group. When you add items to an invoice, enter the group ID and then all of the items in the group are added to the invoice. You can modify the items within the group on the invoice, if necessary.

Smart group codes extend the functionality of groups. On invoices, smart group codes provide flexibility to choose the proper treatment for a patient based on species, sex, age, or weight. There are settings to mark the group item pricing up or down, ask before adding the items, or ask for quantity. Once made “smart,” only items matching the patient or invoice criteria will be added to the invoice.

Example: Dental Group

Includes:

- Dental Examination (ask to update weight if not performed in the last 30 days)
- Presurgical Lab Work (ask before adding)
- Preanesthetic
- Anesthesia (smart selection according to weight)
- Teeth Cleaning/Polish
- Dental Scaling Routine
- Fluoride Treatment
- Antibiotic Pick List (choose an item on the list)
- TPR Monitoring
- Extract Tooth
- Dental Radiographs

Pick

Cornerstone* software allows you to set up a “pick list” to be used in invoicing. Pick lists allow you to quickly choose one item from a list of related invoice items.

Pain Medication Pick List

- Fentanyl Patch
- Rimadyl® 25 mg
- Rimadyl 75 mg
- Rimadyl 100 mg
- Rimadyl Injectable
- Torbugesic® 10 mg/mL
- Torbugesic 50 mg/mL
- Torbutrol® 1 mg
- Torbutrol 10 mg

Examples:

- Antibiotics
- E-collars
- Lab Test List (for example, Fecals, Heartworm Tests)
- Fluid Types

Dispensing

Dispensing items are a type of invoice item. They cannot be used by themselves but instead are attached to an inventory invoice item.

Practices always charge a dispensing fee when sending medications home, but not all practices charge an extra fee for administering them in the hospital. Many include this in their hospitalization fee. Also, this is not an additional dispensing fee. Most practices that use the dispensing item remove the dispensing fee from the inventory item. The dispensing item just gives them a **choice** in dispensing fees. When the drug is administered in the practice, you may want to charge an additional dispensing fee. When the drug is prescribed for a patient’s use at home, you may want to charge the additional dispensing fee.

Examples:

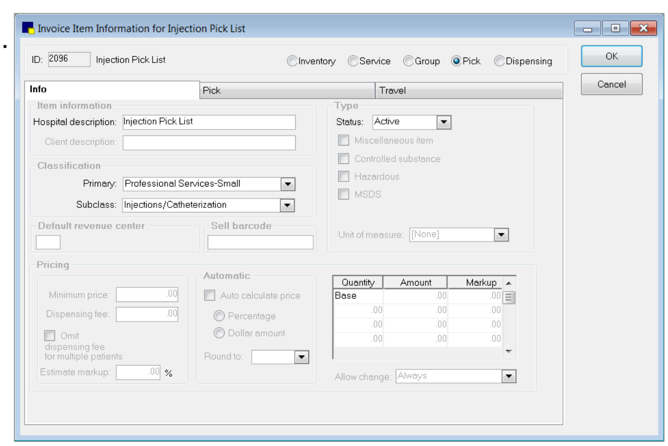
- Initial Injection
- Additional Injection
- Prescribed Medication
- Administered in Hospital

Pick Items

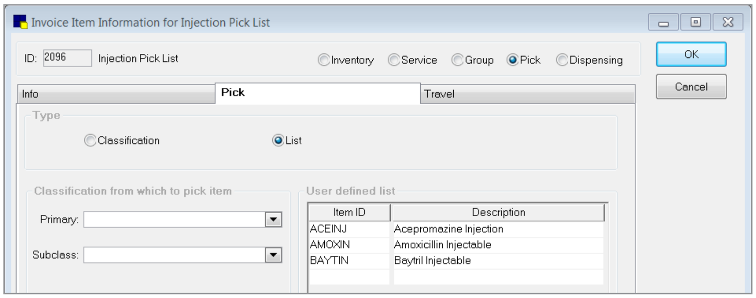
Pick items are very helpful in choosing a single item from a list of related invoice items.

To add a pick item:

1. On the menu bar, select **Lists > Invoice Item**.
2. Click **New**.
3. In the **ID** box, accept the system-generated ID or type an ID.
4. Select **Pick** as the item type.
5. In the **Hospital description** box, type a description.
6. Optional: In the **Client description** box, type a description.
7. In the **Classification** area, select a primary classification from the **Primary** list.
8. Optional: Select a subclassification from the **Subclass** list.
9. Click the **Pick** tab.
10. Select **Classification** and then select the primary (and, optionally, the subclassification) from which to pick the item.
    OR
    If the items you want to select for the different pick items are in different classifications or for a smaller list of items than an entire classification, select **List**.



11. In the **Item ID** field, double-click or press F2 to select the ID for the first item in the user-defined list. Repeat for each item you want to add to the list.



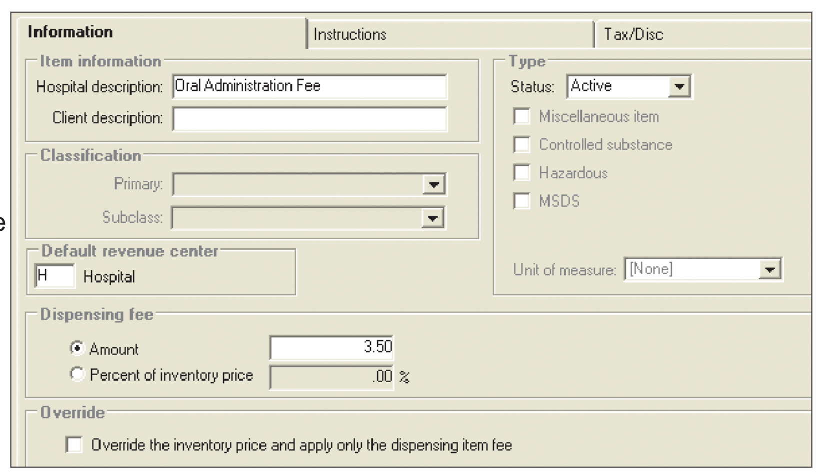
12. Optional: Click the **Travel** tab, and then click to select each travel sheet on which the pick item should appear.
13. When complete, click **OK** to save.

Dispensing Items

Dispensing items are a type of invoice item, and while they may not be used by themselves, they are attached to an inventory invoice item record. Dispensing items can be useful if your practice has different methods for dispensing items.

To add a dispensing item (for example, prescribed rather than administered medications):

1. On the menu bar, select **Lists > Invoice Item**.
2. Click **New**.
3. In the **ID** box, accept the system-generated ID or type an ID.
4. Select **Dispensing** as the item type.
5. In the **Hospital description** box, type a description. The description appears in the Invoice Item List window, in reports, and in the pop-up window to select the dispensing item from a list when attached to an inventory item.
6. Optional: In the **Default revenue center** area, type the revenue center ID to be used by default for this item, or double-click or press F2 to select the revenue center from a list. Dispensing items are a type of invoice item, but they cannot be used alone. They must be linked to an inventory invoice item to be used.
7. From the **Status** list, select the status of this item.
8. security



9. In the **Dispensing fee** area, select one of the following options:
   - **Amount**—Type the fee in the box.
   - **Percent of inventory price**—Type the percent of the inventory price to use for the fee.
10. If appropriate for this dispensing item, select the **Override the inventory price and apply only the dispensing item fee** check box.
11. Click the **Instructions** tab.
12. If it is appropriate to link departing instructions to this item, double-click or press F2 in the first **ID** box and select the departing instructions from a list. Repeat for each instruction to link. Departing instructions print on invoices and are listed in the patient's medical history.

    To review your list of departing instructions, select **Lists > Departing Instructions or Reports > Invoice Item > Departing Instructions**.

13. Select the **Tax/Disc** tab.
14. Select any sales taxes, usage taxes, and discounts to apply to the dispensing item.
15. When the information regarding the setup of this dispensing item is complete, click **OK** to save it.
16. Click **Close** to exit.

Link a Dispensing Item to an Invoice Item

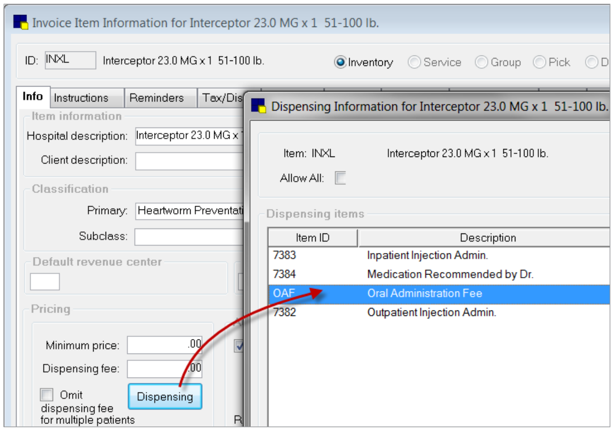
Link a dispensing item to an invoice item so that the dispensing fee is linked to the invoice item but is a separate item.

To link a dispensing item to an invoice item:

1. On the menu bar, select **Lists > Invoice Item**.
2. Select the invoice item and click **Update** or double-click the item.
3. On the **Info** tab, click the **Dispensing** button.
4. Select the dispensing item(s).
5. Optional: If you want to allow staff to select from a list of all active dispensing items, select the **Allow All** check box.
6. Click **OK** to save the information.
7. Click **OK** to exit.

   Existing dispensing fees should be removed from items that have linked dispensing items so that clients are not double billed for the dispensing fee.

   You can mass update dispensing fees and dispensing items with the mass markup tool (**Tools > Mass Markup**). Mass markup requires exclusive use (the computer you are using must be the only one logged into the Cornerstone* system).



Smart Groups

This lesson demonstrates how to create smart groups. Combine items that you often invoice at the same time into a group. Groups provide consistency and reduce missed charges helping your practice to become more efficient using invoices, estimates, or the Patient Visit List window. Smart groups extend the functionality of groups with the flexibility to choose the proper treatment for a patient based on species, sex, age, and/or weight.

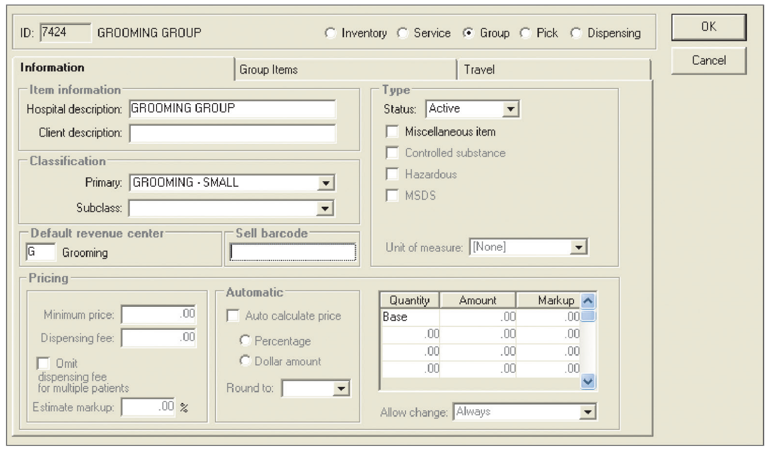
To add a smart group:

1. On the menu bar, select **Lists > Invoice Item**.
2. Click **New**.
3. In the **ID** box, accept the system-generated ID or type an ID.
4. Select the **Group** item type.
5. In the **Hospital description** box, type a description. The description appears in the Invoice Item List window, in reports, and in the patient's medical file.
6. Optional: In the **Client description** box, type a description. This description can be used for invoice items that will appear on the client's invoice. This description is preferred when the hospital description might be confusing or upsetting to a client.
7. From the **Primary** list, select the primary classification for the item.
8. Optional: From the **Subclass** list, select a subclassification.

9. Optional: In the **Default revenue center** box, type the revenue center ID to be used by default for this item, or double-click or press F2 to select the revenue center from a list. If your practice has only one revenue center, it is automatically the default.
10. From the **Status** list, select the status of this item.
11. Optional: If appropriate, select the **Miscellaneous item** check box.

    This allows the description for this item to be changed on various windows (such as Estimate, Invoice, Whiteboard orders, etc.). Item reports will always use the hospital description, regardless of what is entered elsewhere.

12. Click the **Group Items** tab.
13. For each item, click the button in the **Smart?** column to make the item "smart." (The button is initially labeled No.) The Smart Code Item window opens.
14. Click **OK** to save the smart settings.
15. From the **Printing option** list, select an option.
16. If applicable, click the **Travel** tab.
17. Select any travel sheets on which this item should be listed.
18. Click **OK** to save the information.
19. Click **Close** to exit.

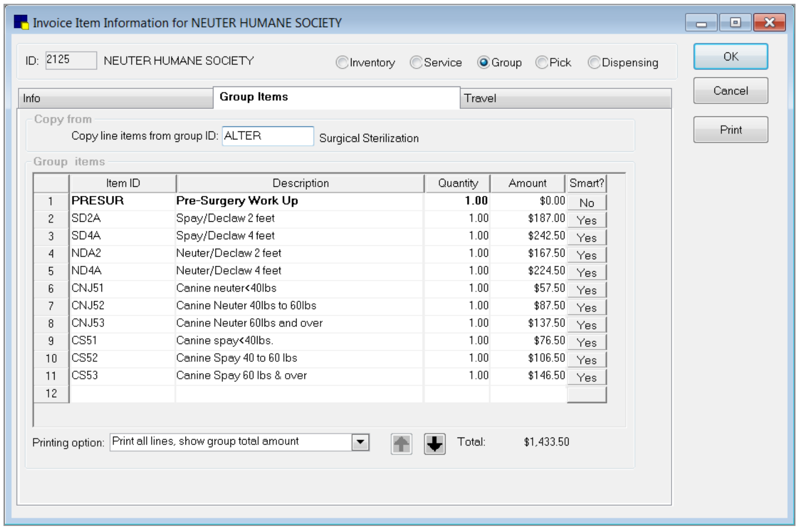


Copy a Group to Another Group

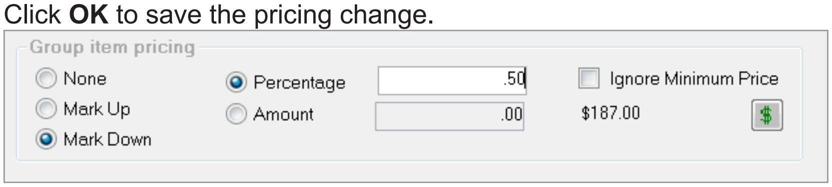
You can create a new group by copying information from an existing group. This option is available only when creating a group.

To copy a group to another group:

1. On the menu bar, select **Lists > Invoice Item**.
2. Click **New**.
3. On the **Info** tab, in the **ID** box, accept the system-generated ID or type an ID.
4. Select the item type.
5. In the **Hospital description** box, type a description. The description appears in the Invoice Item List window, in reports, and in the patient's medical file.
6. Optional: In the **Client description** box, type a description. This description can be used for invoice items that will appear on the client's invoice. This description is preferred when the hospital description might be confusing or upsetting to a client.
7. From the **Primary** list, select the primary classification for the item.
8. Optional: From the **Subclass** list, select a subclassification.
9. Click the **Group Items** tab.
10. In the **Copy line items from group ID** box, double-click or press F2 to select the group that you want to copy from a list.



11. Add or edit items in the group.
12. Optional: To change the price of the group, each item's price must be changed.
    - In the **Smart?** column, click the **Yes** button for the item to update.
    - In the **Group item pricing** area at the bottom of the window, select the **Mark Up** or **Mark Down** option to alter the price.
    - Optional: Select the **Ignore Minimum Price** check box to allow the price to go below the specified minimum price.
    - Click **OK** to save the pricing change.



13. Optional: Change the pricing for other items in this group.
14. Click the **Travel** tab.
15. Select any travel sheets on which this item should be listed.
16. Click **OK** to save the information.
17. Click **Close** to exit.

Instructions

Departing instructions print on the invoice based on the items invoiced and are saved to patient history. You can link an unlimited number of departing instructions to an invoice item. While invoicing, you can add, modify, or delete departing instructions for that specific invoice.

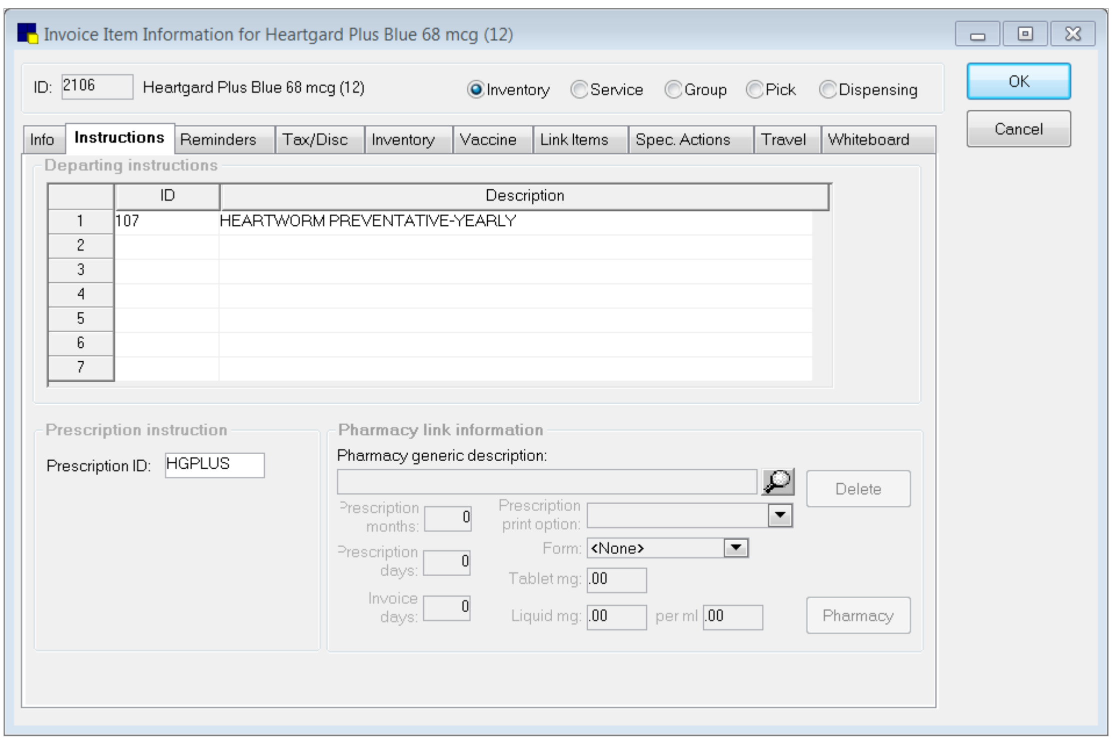
Prescription instructions print on the prescription label based on the items invoiced and are saved to patient history. You can link only one prescription instruction per invoice item.

To link a departing instruction or prescription instruction to an invoice item:

1. On the menu bar, select **Lists > Invoice Item**.
2. Select the invoice item that you want to add instructions to and click **Update**.
3. Click the **Instructions** tab.
4. For a departing instruction, in the first **ID** field in the **Departing instructions** area, type an ID, or double-click or press F2 to select a departing instruction from a list.
5. For a prescription instruction, in the **Prescription ID** box in the **Prescription instruction** area, type an ID, or double-click or press F2 to select a prescription instruction from a list.

   The **Pharmacy link information** area is for use with the Pharmacy Formulary module.

6. Click **OK** to save the instruction information.

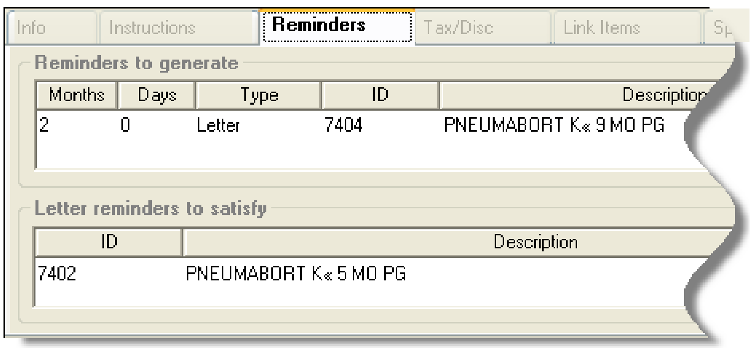


Reminders

You can automatically add reminders to patients' records if you link reminders to invoice items. When the item is invoiced, a reminder for a future item or service is placed in the patient's file. If a reminder exists in a patient's file, the reminder is satisfied whenever the item is invoiced for that patient.

To add a reminder that an invoice item generates and the reminders it satisfies:

1. On the menu bar, select **Lists > Invoice Item**.
2. Select the invoice item you are going to work with and click **Update**.
3. Click the **Reminders** tab. There are two areas on this tab: the **Reminders to generate** area and the **Letter reminders to satisfy** area.
4. Right-click in the **Reminders to generate** area and select **New**.



5. In the **Item ID** box, double-click or press F2 to select the item that is going to generate a reminder. From the **Type** list, select a **Letter** (postcard, letter, trifold, and email) or **Call**.
6. Select the **Ask for months/days in invoicing** check box if the reminder period will need to vary.
   OR
   Enter the number of days or months until the next service is due.

   The reminder will be updated based on the invoice date of the specific line item.
7. Click **OK** to save the reminder information.
8. To set up a reminder that the item will satisfy, right-click in the **Letter reminders to satisfy** area and select **New**.

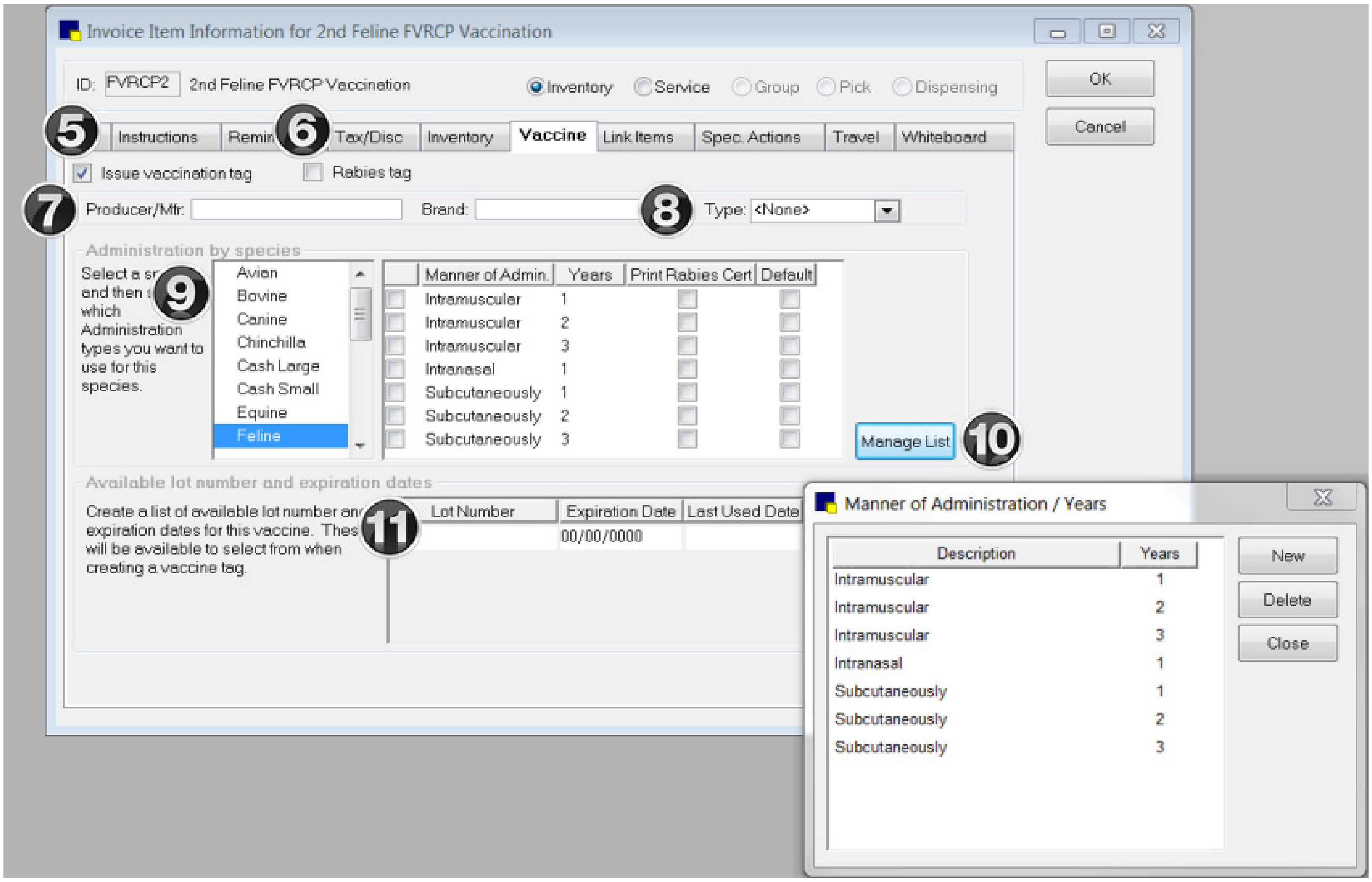
   This item should satisfy the reminder for the previous item in the series or similar item (for example, Bordetella injectable should satisfy for Bordetella Intranasal). Because all items satisfy the reminders for themselves, you *do not* need to create an entry for the original item.
9. Click **OK** to save the reminder information.
10. Click **OK** in the Invoice Item Information window to save the information.
11. Click **Close** to exit the window.

Vaccine Information

Use the **Vaccine** tab on the Invoice Item Information window to set up vaccine information.

Vaccines should be set up as a service item linked to an inventory tracking item. Vaccine information is set up on the inventory item, and the special action is associated with the service item.

The numbers on the image below correspond to the steps in the inventory item procedure.



To add vaccine information to an invoice item:

1. On the menu bar, select **Lists > Invoice Item**.
2. In the **Description** box, type characters for the item you are searching for.
3. Select the invoice item you are going to work with and click **Update**.
4. Click the **Vaccine** tab.
5. Select the **Issue vaccination tag** check box to enable the vaccine tag settings.
6. If this is a rabies vaccine, select the **Rabies tag** check box. This flags the item as a rabies vaccine to be added to the Rabies Tag Report, which is available for those practices required to submit rabies tag information to a state agency. Selecting this check box will also display the **Print certificate** check box on the Vaccine Tag window.
7. In the **Producer/Mfr.** and **Brand** boxes, type the product and manufacturer information for this vaccine so staff will not need to complete this information manually when generating a vaccine tag at invoice time.
8. From the **Type** list, select the applicable vaccine type (**Killed**, **MLV**, etc.)

9. In the **Administration by species** area, do the following:
   a. In the list on the left, select the species for which you want to set up rabies/vaccine tag defaults.
   b. In the adjacent check box selection area on the right, select all possible manner of administration/years combinations that apply to this vaccine and species by selecting the applicable check box in the far left column. All combinations selected here will be available for selection from drop-down lists on the Vaccine Tag window.
   c. If you want the **Print certificate** check box to be selected by default on the Vaccine Tag window at invoice time for a selected manner of administration/years combination, select the **Print Rabies Cert.** check box next to the applicable combination.
   d. If you want to designate a particular manner of administration/Years combination as the default for this species, select the **Default** check box next to the applicable combination. This default combination will automatically populate the **Manner of administration** and **Number of years** fields on the Vaccine Tag window at invoice time (although you can select different settings from the drop-down lists, if necessary).
10. To add or delete manner combinations, click the **Manage List** button. The Manner of Administration/Years dialog box appears with all existing combinations listed.
    a. To add a new combination, click **New**, select the appropriate **Manner of Admin**. and **Years** settings, and click **OK**.

       For the **Years** setting, if the number of years can vary, you can set the years to **Ask**, which will require staff to input the years manually on the Vaccine Tag window at invoice time.

    b. To remove a combination, select the combination in the list and click **Delete**. When you are prompted to confirm the deletion, click **Yes**.
    c. When you are finished, click **Close**. Any manner of administration/years combinations you added or deleted will be reflected in the list available on the Vaccine tab.
11. In the **Available lot number and expiration dates** area, create a list of valid lot numbers and expiration dates for this vaccine. This information will be available for selection from the **Lot number** and **Drug expires** fields on the Vaccine Tag window.

    These settings are not available if lot numbers and expiration dates are tracked through Cornerstone inventory and controlled by consumption.

12. Click **OK** to save your changes, or click another tab to add more information for the item.

    Once the inventory item is set up with vaccine information, link to the appropriate service item and set the service item special action Vaccine Tag to “immediate on invoice/PVL.”

Special Actions

Special actions provide easy ways to prompt staff to remember to perform certain tasks, such as printing a rabies certificate when you invoice for a rabies vaccine, updating weight/vital signs in the patient history, or printing discharge instructions for patients when they check out after a procedure or surgery. Special actions can also be set up to prompt the Cornerstone software into performing an action automatically or allowing you to perform the task manually.
In some cases, you can choose when to perform the task—invoice, Patient Visit List (PVL), etc.

<table>
<tr><th>Special Action</th><th>When to Apply</th><th>Additional Information</th><th>Recommendations</th></tr>
<tr><td>Feeding Guide Software</td><td>Optional on invoice</td><td>N/A</td><td>Attach to Hill's® diets only (optional).</td></tr>
<tr><td>Image Request

This special action is available to link only to service items.</td><td>Immediately on invoice/PVL</td><td>Exam description</td><td>Attach to radiograph invoice items (available only with IDEXX SmartLink* Digital Imaging).</td></tr>
<tr><td>Lab Request</td><td>Immediately on invoice/PVL</td><td>Attach a profile</td><td>Attach to lab service items that can be requested with your Cornerstone laboratory modules.</td></tr>
<tr><td>Mark as Deceased</td><td>Optional on invoice</td><td>N/A</td><td>Attach to all euthanasia, cremation, disposal, or necropsy invoice items.</td></tr>
<tr><td rowspan="2">Prescription Label</td><td>Immediately on invoice/PVL</td><td rowspan="2">N/A</td><td rowspan="2">Attach to all prescribed medication.</td></tr>
<tr><td>Optional on invoice</td></tr>
<tr><td rowspan="4">Print Document</td><td>After invoice is posted</td><td rowspan="4">Attach a document</td><td rowspan="4">Attach to any invoice item where a document should be printed during invoicing (example; spay/neuter certificate).</td></tr>
<tr><td>Optional on invoice</td></tr>
<tr><td>Immediately on invoice/PVL</td></tr>
<tr><td>Before invoice is posted</td></tr>
<tr><td>Sex Modification</td><td>Optional on invoice</td><td>N/A</td><td>Attach to all spay/neuter service items.</td></tr>
<tr><td rowspan="3">Update Microchip ID</td><td>Optional on invoice</td><td rowspan="3">N/A</td><td rowspan="3">Attach to all microchip implant services, as well as check for microchip invoice items.</td></tr>
<tr><td>Immediately on invoice/PVL</td></tr>
<tr><td>Before invoice is posted</td></tr>
<tr><td rowspan="3">Update Vital Signs</td><td>Optional on invoice</td><td rowspan="3">Select the number of days to check in patient's history for an updated weight. If no weight is recorded within that time frame, Cornerstone will prompt you to add a weight.</td><td rowspan="3">Attach to examination, anesthesia, and technician services.</td></tr>
<tr><td>Immediately on invoice/PVL</td></tr>
<tr><td>Before invoice is posted</td></tr>
<tr><td rowspan="3">Vaccine Tag</td><td>Optional on invoice</td><td rowspan="3">N/A</td><td rowspan="3">Attach to all vaccination services where lot number and expiration date should be recorded in patient file. An associated inventory item must be set to maintain quantity on hand, track vaccine information, and be linked to the vaccination service.</td></tr>
<tr><td>Before invoice is posted</td></tr>
<tr><td>Immediately on invoice/PVL (recommended setting for vaccine tag action)</td></tr>
</table>

Chapter Summary

You learned these important concepts in this chapter:

- **Invoice Item Setup Basics**—Learn the basics about the types of invoice items: service, inventory, group, pick, and dispensing.
- **Pick Items**—Create lists to choose from during invoicing.
- **Dispensing Items**—Create and attach multiple dispensing fees to an inventory item. Link a dispensing item to an invoice item.
- **Smart Groups**—Set up smart group codes to take advantage of smart settings. Copy a group to another group.
- **Instructions**—Link departing instructions and prescription instructions to invoice item.
- **Reminders**—Add a reminder that an invoice item generates and the reminders it satisfies.
- **Vaccine Information**—Set up an invoice item to capture vaccine information.
- **Special Actions**—Learn about automatic functions that can occur during invoicing.

Vital Signs Setup

You'll learn these important concepts in this chapter:

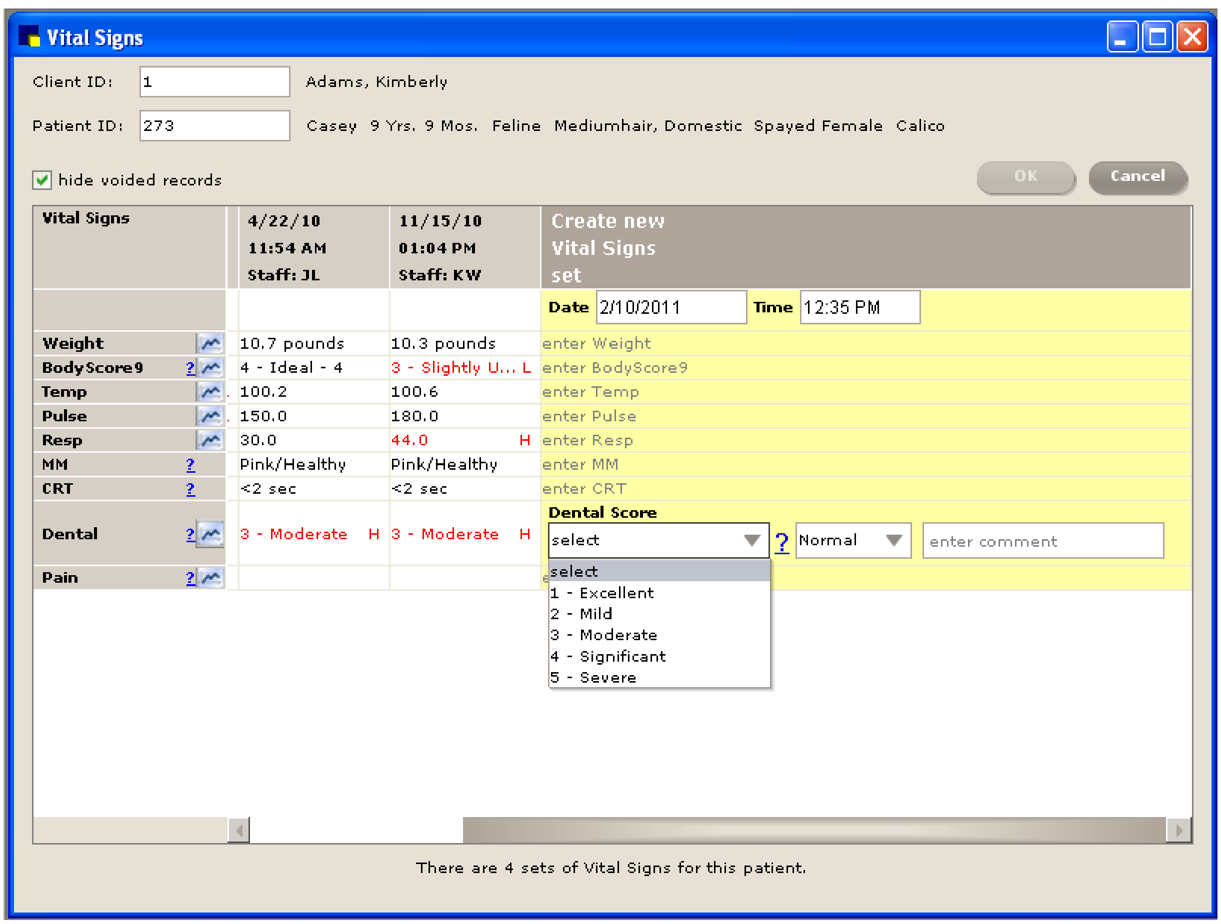
- **Vital Signs Overview**—Features and benefits of using the vital signs feature.
- **Vital Sign Types**—Understand the difference between the vital sign types: alphanumeric, alphanumeric list, numeric, and numeric list.
- **Quick Start Steps**—Understand the steps needed for vital signs setup.

Vital Signs Overview

Vital signs functionality in the IDEXX Cornerstone* Practice Management System allows you to record vital signs and access them throughout Cornerstone in all areas where patient weight has traditionally been displayed. The Vital Signs window provides one central location to review historical vital signs for a patient and allows you to more easily identify changes in a patient's health through comparative trending and graphing.

Using the Vital Signs window you can:

- View, add, edit, and graph vital signs for a patient.
- Include vital sign information in medical notes.



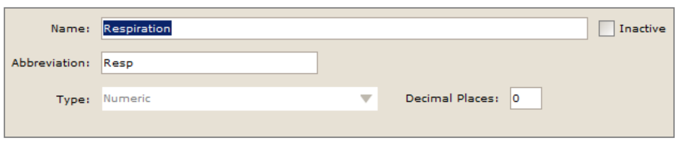
Vital Sign Types

If you want to create your own vital signs to use in your practice's Vital Sign List, think about the way you want staff members to enter/select values for each vital sign—this will determine the type of vital sign to select during setup.

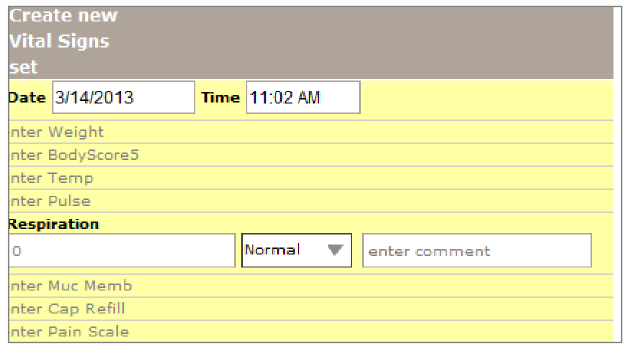
To graph vital signs, you must set up vital signs as a numeric or numeric list type.

Alphanumeric

For an alphanumeric vital sign, at the time of use, the value is typed as letters and/or numbers. Respiration is an example of an alphanumeric vital sign.



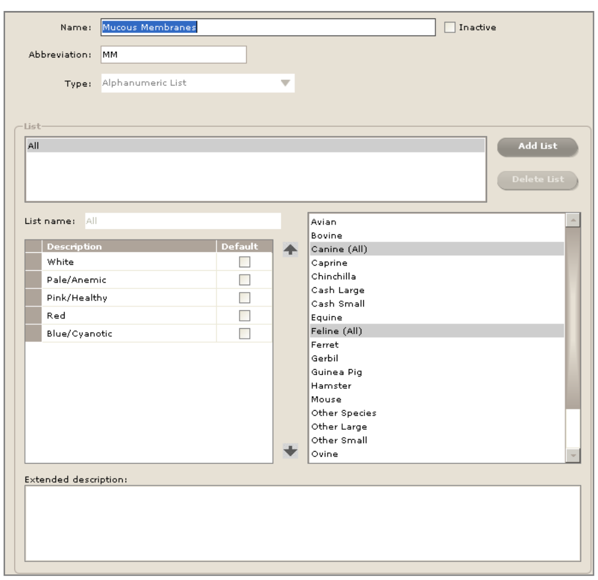
Example of the alphanumeric type during setup



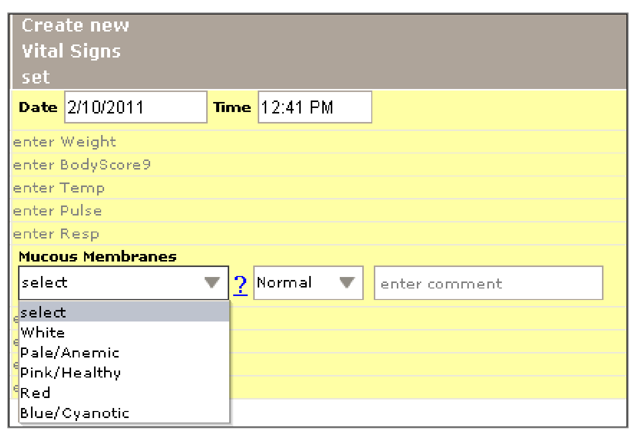
Example of an alphanumeric type during use

Alphanumeric List

For an alphanumeric list vital sign, at the time of use, a value is selected from a list of preconfigured answers containing letters and/or numbers. Mucous Membranes is an example of an alphanumeric list vital sign.



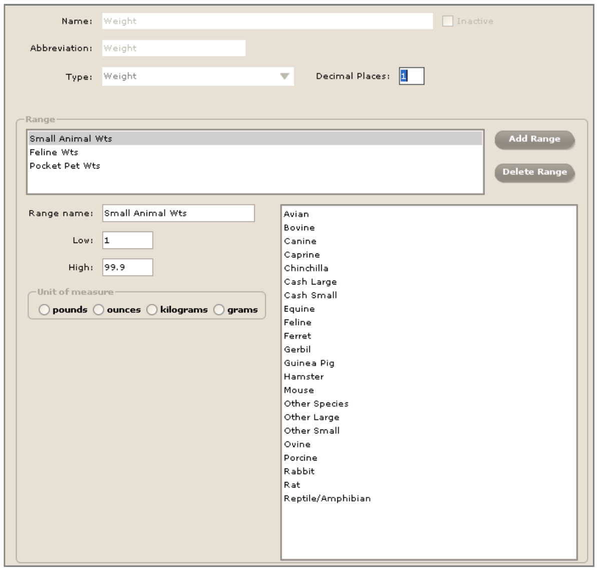
Example of the alphanumeric list type during setup



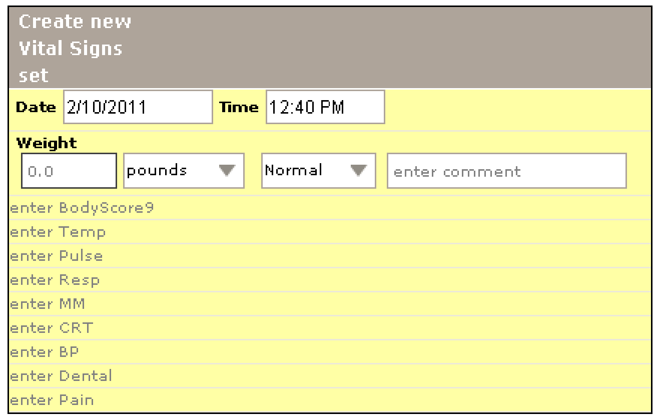
Example of the alphanumeric list type during use

Numeric

With a numeric vital sign, you have the option of setting up one or more numeric ranges to serve as a warning mechanism that alerts you when a value is entered outside the “normal” range for the species. For example, a Temperature vital sign could be set up to use a range with a low temperature and a high temperature specific to species. Numeric vital signs can be graphed.



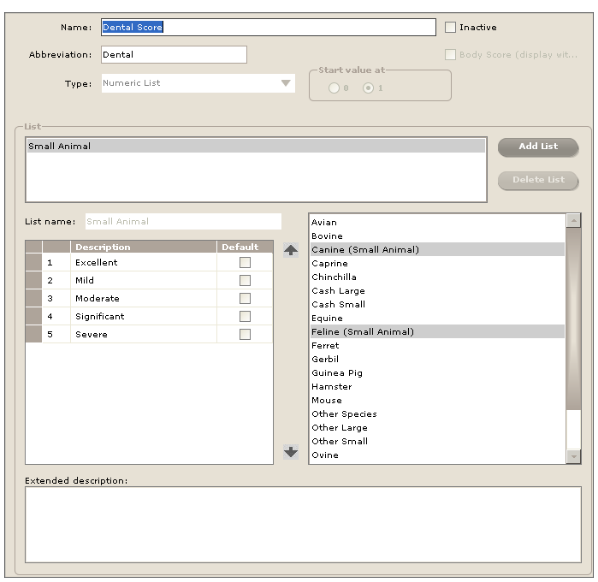
Example of a numeric type during setup



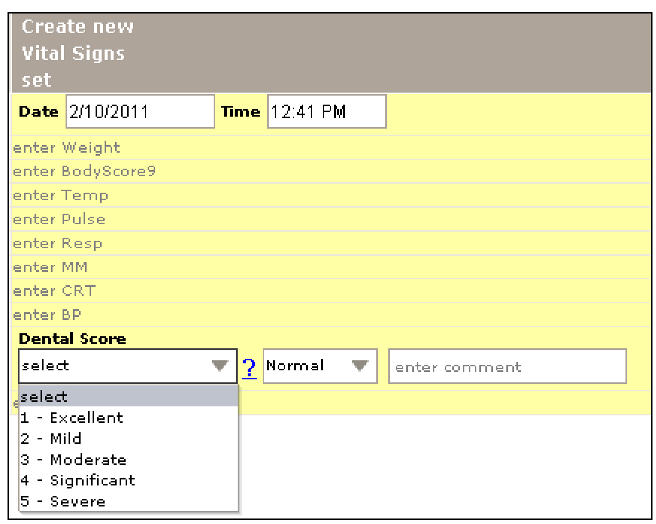
Example of a numeric type entry during use

Numeric List

With a numeric list vital sign, at the time of use, a value is selected from a preconfigured list, where the values are based on a numeric scale with a start value of 0 or 1. You can also simply type the number to quickly assign the associated value in the list. Numeric list vital signs can be graphed.



Example of the numeric list type during setup



Example of the numeric list type during use

Quick Start Steps

To get up and running quickly using the default vital signs, follow these two easy setup steps:

1.	**Activate the vital signs you want to track**	1. Go to **Lists > Vital Signs/Weight**. 2. Select a vital sign and click **Update**. 3. Clear the **Inactive** check box to activate it. **Note**: When updating an existing vital sign, the type (numeric, alphanumeric, etc.) cannot be changed.
2.	**Assign species to applicable lists for vital signs**	1. Go to **Lists > Vital Signs/Weight**. 2. Select an alphanumeric list or numeric list vital sign and click **Update**. 3. Select a list and then select the applicable species to associate it with the list.

To take advantage of additional vital signs features, consider these optional steps:

OPTIONAL	**Add "normal" low/high ranges and assign species to each range for numeric vital signs. Staff will be alerted when values entered are outside the range.**	1. Go to **Lists > Vital Signs/Weight**. 2. Select a numeric vital sign and click **Update**. 3. Add a range and specify its low and high values. 4. Select the applicable species to associate with the range. **Tip**: Do not set a default body score as each weight entry will also set a body condition score to your default settings.
	Set the order in which vital signs appear.	1. Go to **Lists > Vital Signs/Weight**. 2. Click **Set Order**. 3. Use the arrow buttons to move each vital sign to the position that you want it in the list. **Note**: See the image on the next page.

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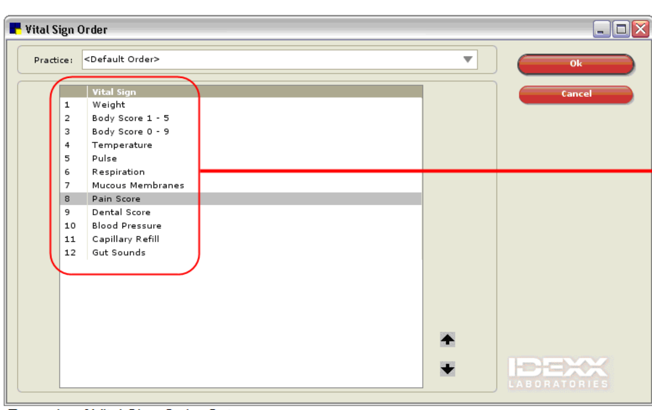
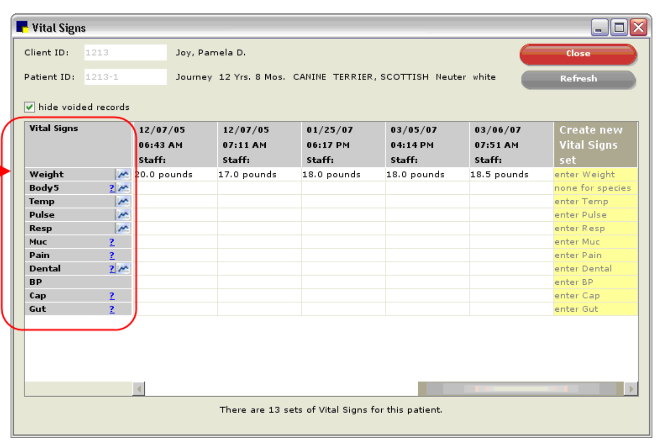


Example of Vital Sign Order Setup



Example of Vital Sign column during use

Chapter Summary

You learned these important concepts in this chapter:

- **Vital Signs Setup**—Features and benefits of using the vital signs feature.
- **Vital Sign Types**—Understand the difference between the vital sign types: alphanumeric, alphanumeric list, numeric, and numeric list.
- **Quick Start Steps**—Understand the steps needed for vital signs setup.

Electronic Whiteboard Setup

You'll learn these important concepts in this chapter:

- **Customization Recommendations—**View and adjust various defaults and setups that improve the effectiveness of using the Electronic Whiteboard window in your practice. Customize alerts, categories, areas, frequencies, patient hospital statuses, and wards/locations to make it easy for your staff to use the Whiteboard.
- **Electronic Whiteboard Nonbillable Invoice Item Setup**—Create nonbillable invoice items for the Electronic Whiteboard and set the rules for Whiteboard use.
- **Other Electronic Whiteboard Considerations**

Customization Recommendations

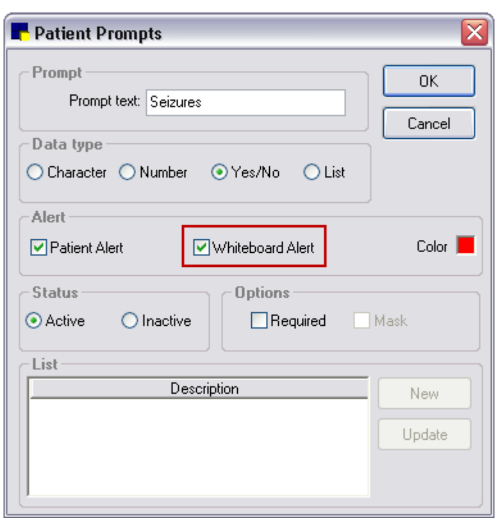
Your staff's effectiveness when using the Electronic Whiteboard is affected by proper setup. In this section, ensure you have completed the recommended setup in your database.

Alerts

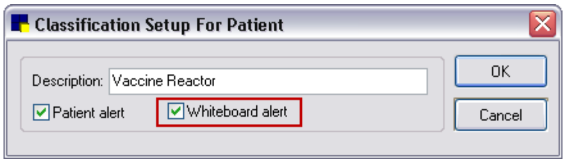
- Create Electronic Whiteboard alerts using:
  - User-defined prompts
  - Classifications
  - Preset Electronic Whiteboard alerts
  - User-entered Electronic Whiteboard alerts (must be less than 30 characters)
- Update existing alerts (user-defined prompts, classifications)

  See "User-Defined Prompts and Classifications—Client and Patient" on page 15 for detailed setup information.

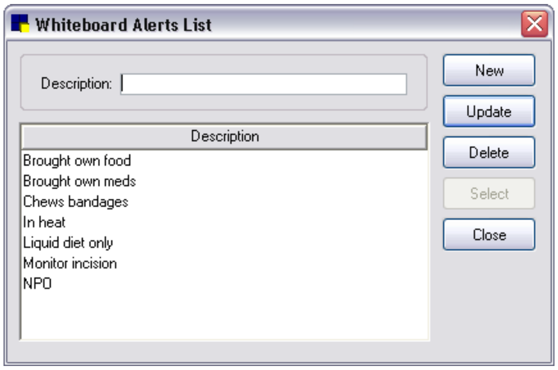
  - You can designate certain patient prompts (**Controls > User Defined Prompts > Patient** tab) to display on the Electronic Whiteboard window.



- You can designate certain patient classifications (**Controls > Classifications > Patient** tab) to display on the Electronic Whiteboard window.



- Create Electronic Whiteboard alerts (**Lists > Electronic Whiteboard > Alerts**)



Examples:

- NPO
- Surgery today
- Brought own meds
- Liquid diet only
- In heat
- Brought own food
- Monitor incision
- Chews bandages

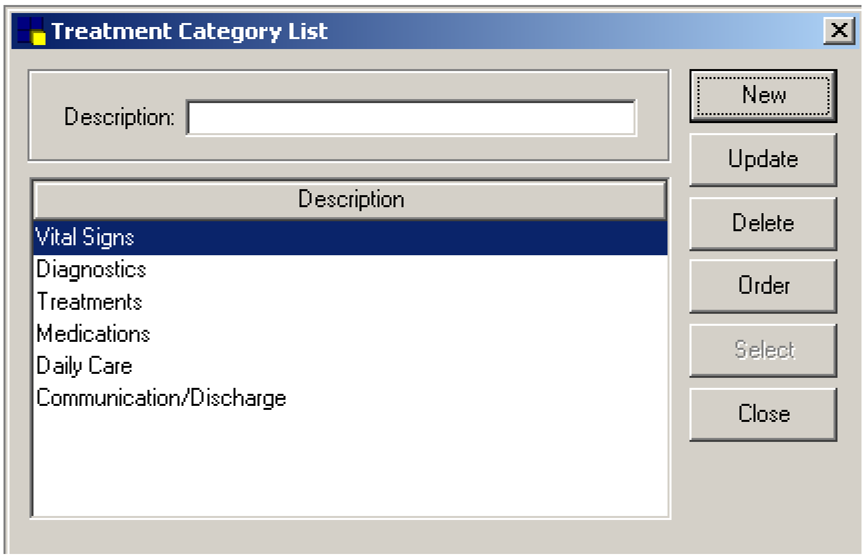
Areas

- Customize areas so that you can, for example, view lab work the technicians have for the day using the main Electronic Whiteboard window.
  - Select **Lists > Electronic Whiteboard > Areas** to open the Treatment Area List window.

Areas *(Areas assigned per Electronic Whiteboard order)*		
Setup Suggestions		
Locations or Department in Hospital	⇨	Boarding ICU Treatment
Tasks List	⇨	Lab work Radiology Exam
Staff to Complete	⇨	Technician Doctor Assistant
Use Options		
• Filter Electronic Whiteboard main view and Electronic Whiteboard reports. • Assign to each patient order.		

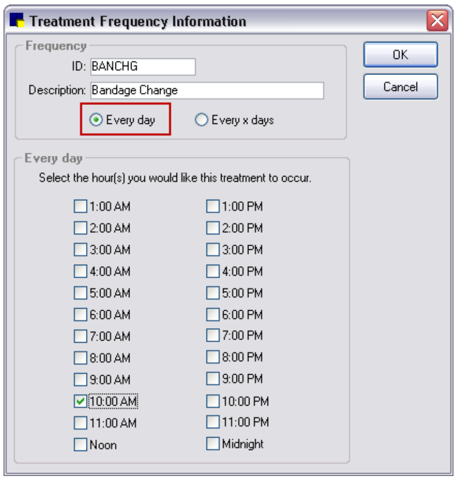
Categories

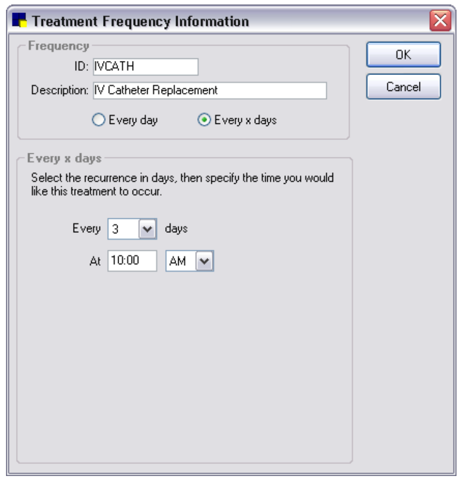
- Use categories to:
  - Assign per patient order
  - View patient treatments
  - Filter Electronic Whiteboard reports and Whiteboard treatments view
- Select **Lists > Electronic Whiteboard > Categories** to open the Treatment Category List window.
  - Customize categories so that the Patient Treatments window has a general order that works for your medical team.
  - The following treatment categories are already set up for you in the Cornerstone software:
    - Vital Signs
    - Diagnostics
    - Treatments
    - Medications
    - Daily Care
    - Communication/Discharge



Frequencies

- Select **Lists > Electronic Whiteboard > Frequencies** to open the Treatment Frequency List window.
- Make frequency changes so that:
  - Practice hours and treatment times are reflected in the provided frequencies already set up in your database.
  - You can treat every hour, every other hour, every day, every x days, start today with the same time tomorrow, and start today with a different time tomorrow.
  - Patient Visit List charges will be calculated properly (billing type x frequency = Patient Visit List charge).





- Customize to fit practice hours and needs.

  Example: every day vs. every x day
- Modify frequency description to include time.

  Example: BID 8a, 5p; every two hours (even)
- Set order of frequency drop-down list.

A list of default frequencies is provided below.

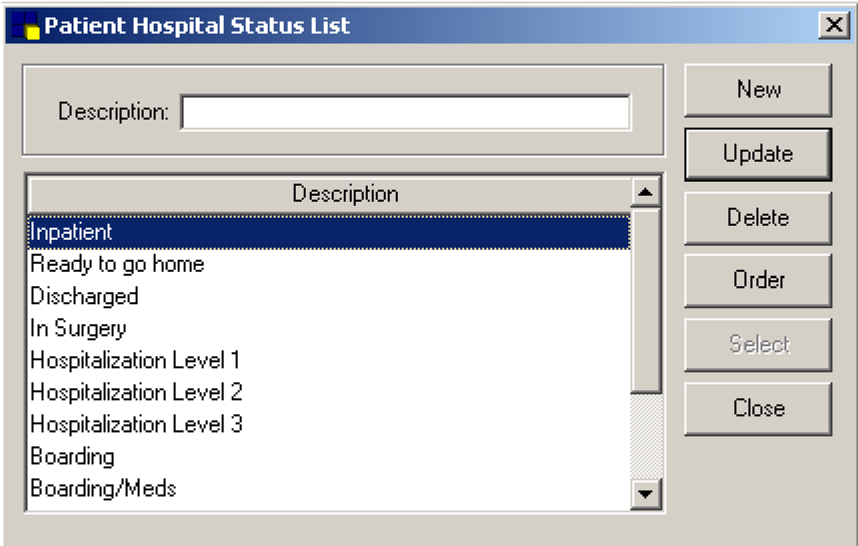
Nonrecurring	Recurring (24-hour based)	Recurring (set to clinic preferences)
One Time	Every 4 hours	SID
Until Completed†	Every 6 hours	BID
	Every 8 hours	TID
	Every 12 hours	QID
	Every 24 hours	Every 2 days
	Continuous†	Every 3 days

†These frequencies do not include an "overdue" notification.

Recommended Additional Electronic Whiteboard Frequencies		
SID Noon	Every 2 hours (even)	Hourly
SID PM	Every 2 hours (odd)	

Patient Hospital Status

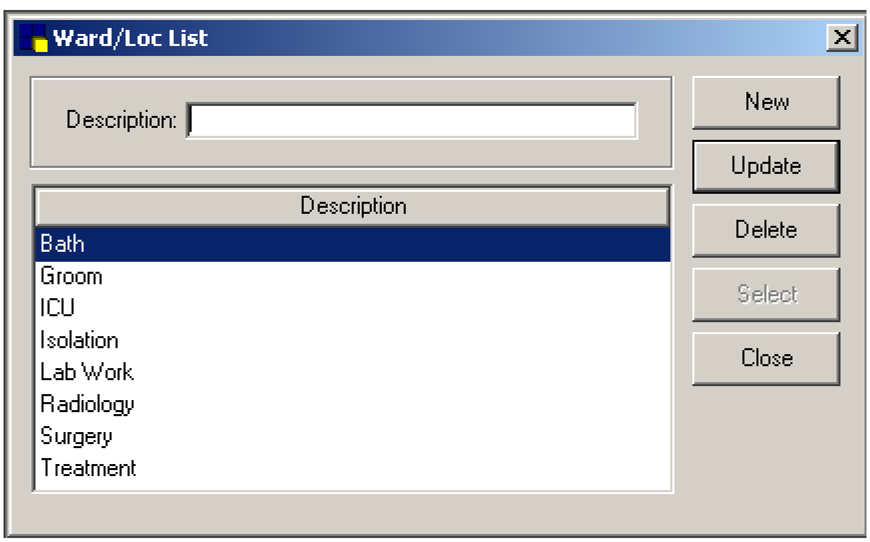
- Select **Lists > Patient Hospital Status** to open the Patient Hospital Status List window.
- Customize patient hospital statuses so that, at a glance, any staff member can see the current status.



Additional statuses will be treated as “ready to go home” if the following keywords are included in the description: **home**, **discharge**, **release**, or **pick**.

Ward/Location

- Select **Lists > Ward/Loc** to open the Ward/Loc List window.
- Customize wards/locations so that you can filter by the number of patients in certain areas of the practice on the main Electronic Whiteboard window.



Ward/Loc *(Wards/Locations assigned per patient)*		
Setup Suggestions		
Location in Hospital	⇨	Sx Tx Iso ICU
Department	⇨	Boarding Hospital Grooming
Use Options		
• Sort or filter Electronic Whiteboard main view and Electronic Whiteboard reports. • Enter or modify from Check-In and Patient Orders windows. • Readily visible from Census List and Patient Clipboard* windows.		

tip The table below shows how areas and wards/locations are related and how they can be used together. Both areas and wards/locations are filters for the main Electronic Whiteboard window.

Electronic Whiteboard Settings—Areas and Ward/Loc

Areas (assigned per order)		**Ward/Loc** (assigned per patient)	
Setup Suggestions		**Setup Suggestions**	
Location in Hospital	Boarding, ICU, Treatment	Location in Hospital	Sx, Tx, Iso, ICU
Task List	Lab Work, Radiology, Exam	Department	Boarding, Hospital, Grooming
Staff to Complete	Tech, Doctor, Assistant	Reason for Visit	Board, Surgery, Drop Off
Use Options		**Use Options**	
Filter Whiteboard main view and Whiteboard reports.		Filter Whiteboard main view and Whiteboard reports .	
Assign to each patient order.		Enter/modify from Check-In and Patient Orders windows.	
		Readily visible from the Census List and Patient Clipboard windows.	

Electronic Whiteboard Nonbillable Item Setup

Create invoice items for use on the Electronic Whiteboard that will not be part of the client invoice.

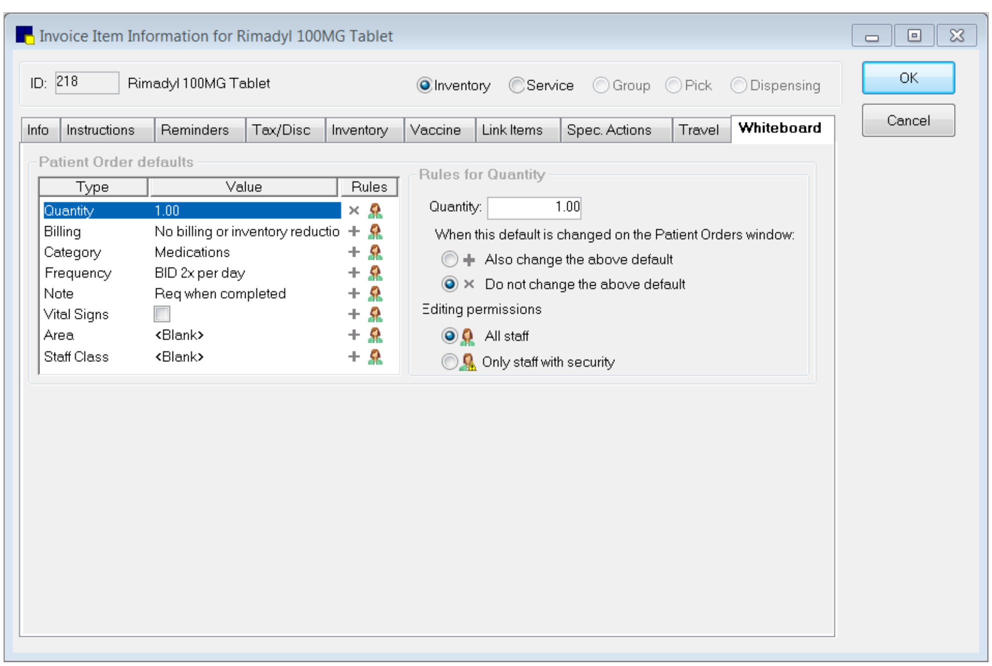
1. Create a specific classification for the nonbillable items (**Lists > Invoice Item Class**). This will help the set up of pick lists and travel sheets in the future, as well as mass setup of default values.
2. Using the following examples as a guide, create invoice items under the Electronic Whiteboard classification created in step 1. As these items will be nonbillable, there is no need to set pricing, link instructions, or add reminders or special actions.

   tip Select the **Miscellaneous** check box to allow customized descriptions when using on the Patient Orders window.

Whiteboard Nonbillable Items	
☐ Administer Medication	☐ Monitor Appetite and Drinking
☐ Blood Draw	☐ Monitor Catheter/Fluids
☐ Call Client	☐ Monitor Urination
☐ Remove Catheter	☐ Take Radiograph
☐ Check Bandage	☐ Vital Signs
☐ Check Stool	☐ Walk
☐ Check for Vomiting	☐ Water
☐ Check Incision	☐ Clean Cage/Change Litter
☐ Feed	☐ Procedure (a placeholder for the main procedure)
☐ Feed (Owner Food)	

3. Click the **Whiteboard** tab. Set default values and field-level rules for the invoice items that staff may enter on the Patient Orders window. Refer to the following image on the next page for available fields.

   The Invoice Item Setup tool (**Tools > Invoice Item Setup**) is used to set up your invoice items for the first time or to quickly make mass changes to many invoice items simultaneously. The **Whiteboard** tab allows you to perform a mass setup of default values and field-level rules for invoice items that staff may enter on the Patient Orders window.



tip
- See the Cornerstone Help system for more information on using the Invoice Item Setup tool.
- For increased efficiency in using Electronic Whiteboard non-billable invoice items, consider using a smart group or travel sheet. Please see the Appendix for the setup information for these features.

Other Whiteboard Considerations

Modified Pricing Solutions

For these scenarios, estimate or Patient Visit List (PVL) items with modified prices revert to normal price after they are completed on the Electronic Whiteboard and transferred back to the PVL:

- Smart group using price mark up/down
- Items with estimate markup percentage
- Manually modified prices

Use these techniques as solutions for price changes:

Smart Groups

- Move the entire group from the Patient Visit List to Whiteboard.
- Leave “special price” items on the Patient Visit List and add nonbillable items to the Patient Orders window.
- Adjust groups to not use mark up/mark down feature.
- Always check Patient Visit List before invoicing.

Items with Estimate Markup Percentage

- Leave “special price” items on the Patient Visit List and add nonbillable items to the Patient Orders window.
- Remove estimate markups.
- Always check Patient Visit List before invoicing.

Manually Modified Prices

- Leave “special price” items on Patient Visit List and add nonbillable items to the Patient Orders window.
- Always check Patient Visit List before invoicing.

Chapter Summary

You learned these important concepts in this chapter:

- **Customization Recommendations—**View and adjust various defaults and setups that improve the effectiveness of using the Electronic Whiteboard window in your practice. Customize alerts, categories, areas, frequencies, patient hospital statuses, and wards/locations to make it easy for your staff to use the Whiteboard.
- **Electronic Whiteboard Nonbillable Invoice Item Setup**—Create nonbillable invoice items for the Electronic Whiteboard and set the rules for Whiteboard use.
- **Other Electronic Whiteboard Considerations**

Medical Notes and Correspondence

You'll learn these important concepts in this chapter:

- **Document Template Overview—**Document template benefits, types, and sample listings of correspondence and medical notes you may want to create.
- **Windows and Features for Creating Document Templates**—Become acquainted with the windows to select and modify the document templates, including the toolbars to add elements that make the document easy to use, such as text input fields, check boxes, bookmarks, tables, and images.
- **Template Properties and Save Properties**—Options that control how a document is saved in history, managed, and printed.
- **Other Procedural Steps**

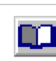
Document Template Overview

Document templates are reusable forms used to create medical notes and client correspondence type of documents. Document templates are just like familiar word processing programs and are easy to use. The benefits of setting up templates include data entry efficiencies and consistent content amongst staff.

Create a print-only, correspondence, or medical note document template type.

- **Print Only** documents are considered one-time use documents and are not saved to the patient's history. Examples of print-only documents might include PetDetect* collars, vaccination schedules, and information or cage cards.
- **Correspondence** documents are saved to a patient's history either as the entire document or as the title only, depending on how the template was set up. Examples of correspondence documents might include consent forms, insurance forms, or health certificates.
- **Medical Note** documents accommodate routine procedures and create forms for a consistent look and content. This makes searching easier and reduces missing information. Suggestions for medical note document templates include Medical Exam, Surgery Notes, or Grooming Notes. These document templates are located on the **Medical Notes** tab on the bottom of the Patient Clipboard* window. Information in a medical note can be edited until it is finalized. After the document is finalized, it cannot be changed, but an addendum can be added

This chart shows the document types that are recorded in the patient's medical history and what the source icon for each one looks like.

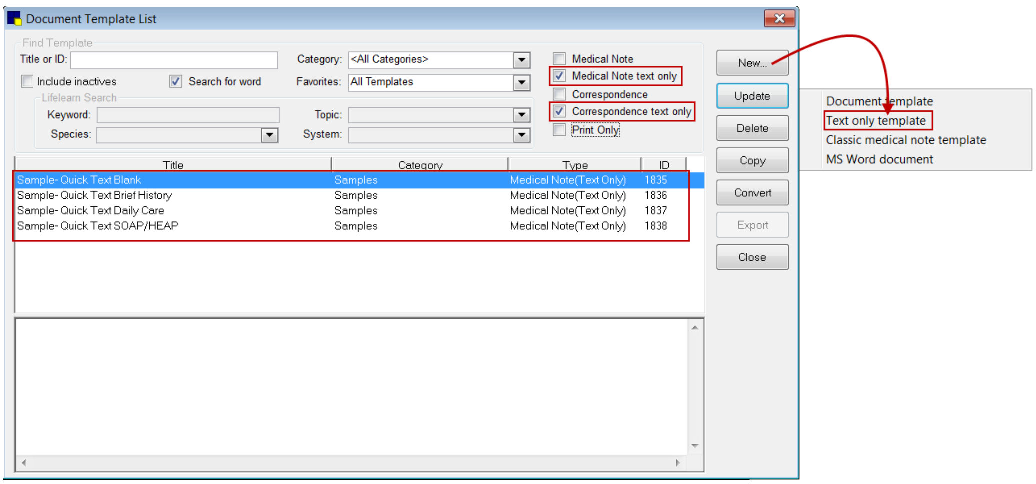
Document Type	Recorded in Medical History	Source Icon
Print only	No	None
Correspondence—Title Only	Yes	
Correspondence—Entire Document	Yes	
Medical Notes	Yes	

Document templates can be used to create a variety of documents. Here is a list of some document templates you may want to use and create:

Client Education	Breed sheets, medication information, wellness programs, and pet's first year
Labels	Lab, cage, file, client, storage, and bar code
Certificates	Health, surgical sterilization, vaccination, puppy/kitten class, and brushing teeth
Letters	New client, returning client, collections, lost pet, medication information, newsletter, and special offers
Forms	Surgery authorization, health certificates, medication requests, discharge instructions, feeding schedules, and check-in checklists
Medical Notes	Exams, procedures, treatments, diagnostic results, health profiles, and vital signs

Windows and Features For Creating Document Templates

The Document Template List window (**Lists > Documents > Templates**) includes options for finding, creating, and converting templates.



tip Four sample "Quick Text" templates are included in the Samples category.

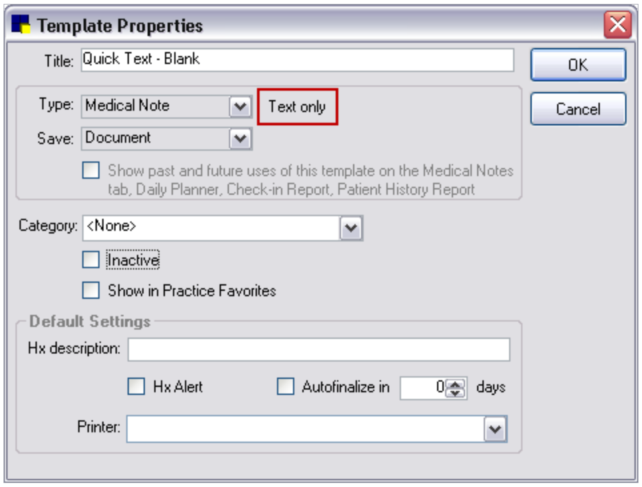
Text Only vs. Enhanced Medical Notes—Feature Comparison Table

The following table summarizes the main features and functionality available with the two main styles of medical notes offered in Cornerstone.

Feature/Functionality	Text Only Templates	Enhanced Templates
Use a designated Medical Note Quick Text document for immediate text entry, bypassing the Start New Document window steps.	●	
Click the **Color All Text** button to apply a single color to all text.	●	
Apply multiple colors to select words or paragraphs throughout a document.		●
Apply text styles and formatting, such as font selection, bold, italics, indent level, numbered/bulleted lists, etc.		●
Insert check boxes, tables, and other design elements.		●
Import graphic files, photos, and logos.		●
Add standard text-based bookmarks.	●	●
Add image-based bookmarks (bookmarks that include signatures, images, etc. or bookmarks that are inserted in a table format).		●
Insert a date/time stamp.	●	●
Insert a problem description or diagnosis description.	●	●
Insert a table of problem details, diagnosis details, or vital signs.		●
Lock a medical note to create a quick "tab-through" form using text input fields.	●	●
Use spell check.	●	●
Use header/footer features.		●
Include attachments.	●	●
Include invoice items.	●	●
Use options for page setup and margins.		●
Email the client directly from the medical note	●	●
Save a document with a Draft, Tentative, or Final status and continue to add to or update the document.	●	●
Void a document.	●	●
Add an addendum to a document.	●	●
Insert an entire medical note into a correspondence document.	●	●
View full contents of the medical note on the Patient Clipboard **Text** tab and **Medical Notes** tab.	●	
View medical note in the Preview pane on the Patient Clipboard*.	●	●

To create a new text only template:

On the menu, select **Lists > Documents > Templates** and do one of the following:



- Click **New** and then select **Text only template**. Create the template and click **Save**.
- Select an existing template in the list and click **Update**. Make changes to the template and click **Save As** to create a new template and update the template properties.
- Select an existing template of the same type, click **Copy**, and enter a name for the new template in the **Description** box. Then select the copied template in the list and click **Update** to make any changes. Click **Save** to save with the existing template properties or **Save As** to change the template properties.

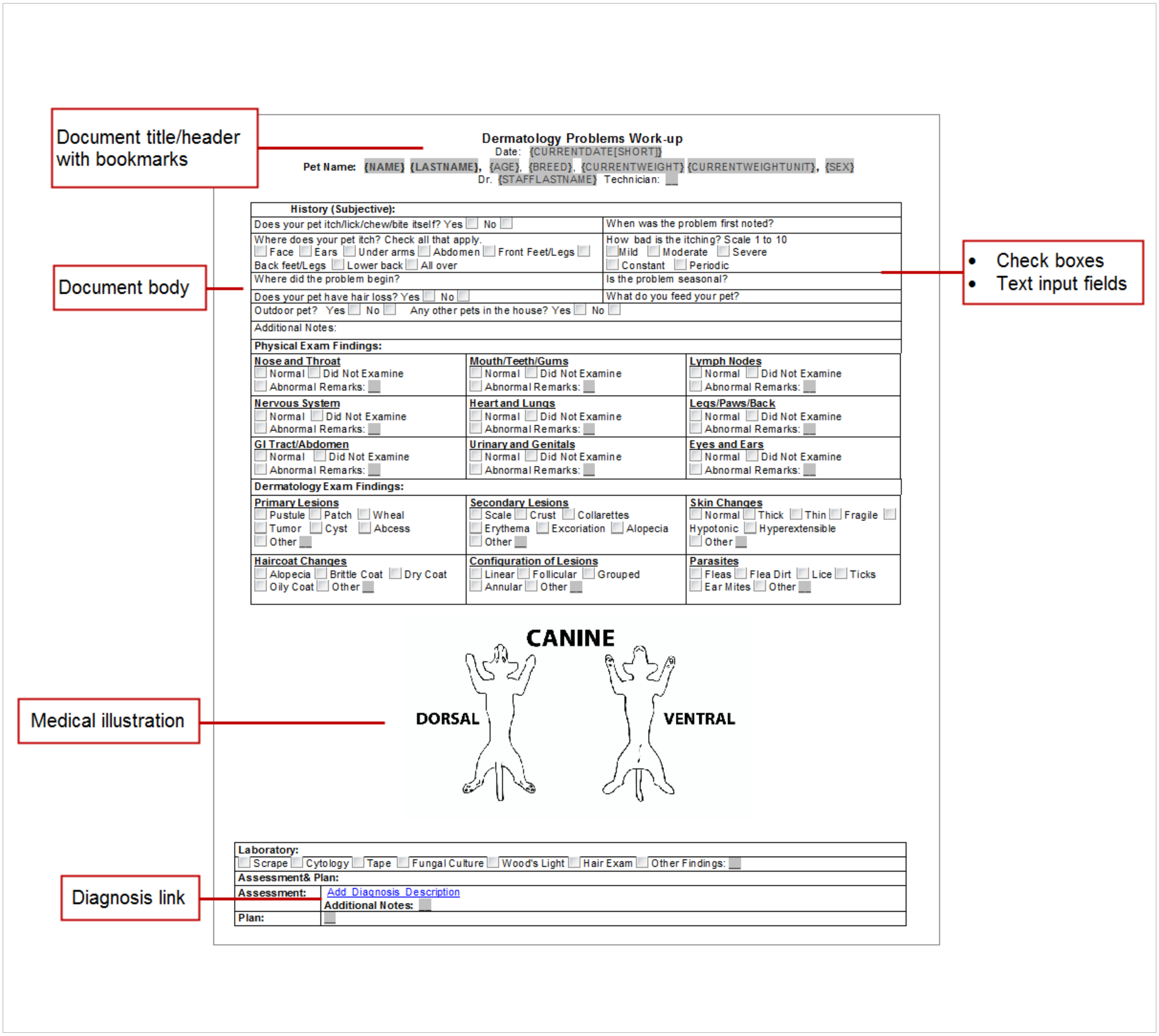
Click **Edit Properties** to set properties, including the title, category, and history description. You can also do this when you save the template..

Template Properties and Save Options

Setup Basics for Templates

1. Create a new template or update an existing template and click **Save As**.
2. Create/update the top of the document (title or letterhead).
3. Create/update the body of the document.
   - Develop content and layout first.
   - Identify work flow considerations: technician/doctor use and order of entries
   - Use fonts, text alignment, bullets, numbering, and colored text (formatting options found in programs like Microsoft® Word).
   - Paste text from Word and some types of PDF files (may lose original formatting).
   - Apply shading or colors to table cells to separate document sections.
4. Add elements:
   - Bookmarks
   - Text input fields
   - Check boxes
   - Links
   - Medical illustrations and pictures
   - Page breaks
5. Create/update the bottom of the document (footer or signature).
6. Set properties (description, type, practice favorite, auto finalize, default printer).

Bookmarks for Cornerstone data can be included in document templates. At the time of use, when a document with bookmarks is printed, the bookmarks are replaced with the applicable data. For example, if the client FullName bookmark is included in the template, the client's name replaces the bookmark in the document at the time of use.



Dermatology Problems Work-up
Date: {CURRENTDATE[SHORT]}
Pet Name: {NAME} {LASTNAME}, {AGE}, {BREED}, {CURRENTWEIGHT} {CURRENTWEIGHTUNIT}, {SEX}
Dr. {STAFFLASTNAME} Technician:

History (Subjective):
Does your pet itch/lick/chew/bite itself? Yes No
When was the problem first noted?
Where does your pet itch? Check all that apply. Face Ears Under arms Abdomen Front Feet/Legs Back feet/Legs Lower back All over
How bad is the itching? Scale 1 to 10 Mild Moderate Severe Constant Periodic
Where did the problem begin?
Is the problem seasonal?
Does your pet have hair loss? Yes No
What do you feed your pet?
Outdoor pet? Yes No Any other pets in the house? Yes No
Additional Notes:

Physical Exam Findings:
Nose and Throat: Normal Did Not Examine Abnormal Remarks:
Mouth/Teeth/Gums: Normal Did Not Examine Abnormal Remarks:
Lymph Nodes: Normal Did Not Examine Abnormal Remarks:
Nervous System: Normal Did Not Examine Abnormal Remarks:
Heart and Lungs: Normal Did Not Examine Abnormal Remarks:
Legs/Paws/Back: Normal Did Not Examine Abnormal Remarks:
GI Tract/Abdomen: Normal Did Not Examine Abnormal Remarks:
Urinary and Genitals: Normal Did Not Examine Abnormal Remarks:
Eyes and Ears: Normal Did Not Examine Abnormal Remarks:

Dermatology Exam Findings:
Primary Lesions: Pustule Patch Wheal Tumor Cyst Abcess Other
Secondary Lesions: Scale Crust Collarettes Erythema Excoriation Alopecia Other
Skin Changes: Normal Thick Thin Fragile Hypotonic Hyperextensible Other
Haircoat Changes: Alopecia Brittle Coat Dry Coat Oily Coat Other
Configuration of Lesions: Linear Follicular Grouped Annular Other
Parasites: Fleas Flea Dirt Lice Ticks Ear Mites Other

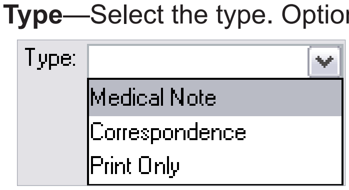
Laboratory:
Scrape Cytology Tape Fungal Culture Wood's Light Hair Exam Other Findings:
Assessment& Plan:
Assessment: Add Diagnosis Description
Additional Notes:
Plan:

Use the following information to change template properties and use the various save options.

1. Click the **Edit Properties** button to open the Template Properties window.
   - **Name**—Type a name for this document template. The document template name will be included in the history entry when this document template is used to create a patient document.

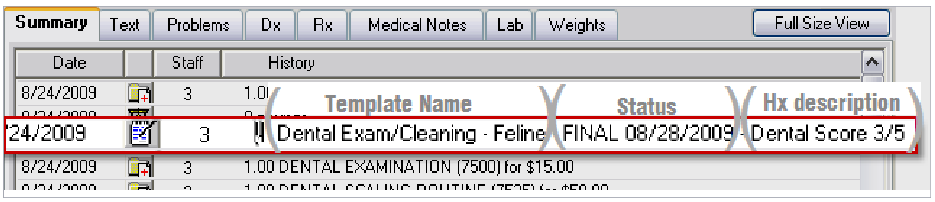
   - **Type**—Select the type. Options are **Medical Note**, **Correspondence**, or **Print Only**.

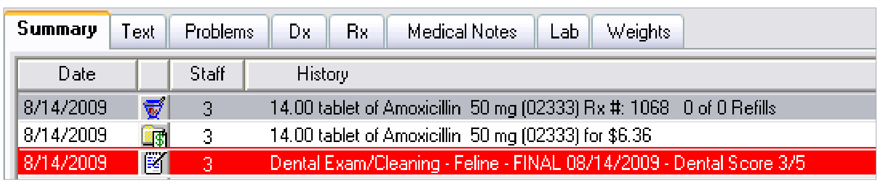
- **Save Correspondence as**—When **Correspondence** is selected as the type, select how to save the document: **Title Only** (only the title and no content will be recorded in medical history) or **Document** (the entire document will be recorded in medical history). The **Save** option is not applicable to Medical Note or Print Only documents.
- **History (Hx) description**—(Optional) Type a default history description for this document template. This provides you with an additional description for this document and will be recorded in medical history. When recorded, the history line will be listed with the document name, followed by the status, and then followed by the history description for the document.

  tip History descriptions can be added or modified as needed.

  Sample of history description in history entry.

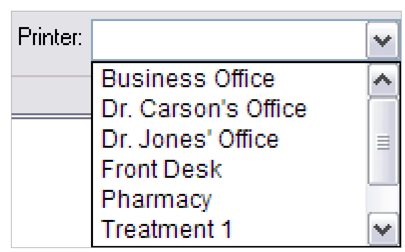


- **History (Hx) Alert**—Select the **Hx Alert** check box to mark this document template as an alert in medical history. Alerts help draw attention to the medical history entry.



- **Autofinalize in**—Select the **Autofinalize in** check box if you want the documents created from this document template to autofinalize. Indicate the number of days in which the document should autofinalize.

- **Printer**—If this document template should print to a specific printer, select it from the list.



2. When the Template Properties window is complete, click **OK**.
3. Save the document template by clicking **OK**, **Save**, or **Cancel**.
   - **OK**— Save and exit.
   - **Save**—Save and continue.
   - **Cancel**—Cancel changes and close.
4. The document template has been added to the list. Click **Close** to close the Document Template List window.

Other Procedural Steps

Template Conversion Options

On the Document Template List window, select a template in the list and then click **Convert**. The conversion options available depend on the type of template you selected to convert.

Text Only conversion options include:

- **Enhanced converted to Text Only**—Converts the template and opens it for editing in the Cornerstone* Editor (in Text Only mode). The template retains only text from the enhanced template; tables, images, check boxes, etc. will be removed.
- **Text Only converted to Enhanced**—Converts the template and opens it for editing in the Cornerstone Editor.
- **Classic converted to Enhanced or Text Only**—Converts the template and opens it for editing in the Cornerstone Editor (in Text Only mode).

Conversion notes:

- When you convert a template, the original template is saved but inactivated.
- Bookmarks and invoice items are retained in the conversion, but note that when converting to Text Only, any nontext bookmarks will be removed.

Inserting Headers and Footers

1. On the Template Update window, on the menu, select **Insert > Header Footer >** and then select **Insert Header**, **Insert Footer**, **Delete Header**, **Delete Footer**, or **Edit Header Footer** (the options available depend on what the template already contains).
2. Make any changes, such as inserting bookmarks, page numbers, etc.
3. Select **Insert > Header Footer > Edit Header Footer** to exit the header or footer.

Inserting Tables

1. Place your cursor in the location where you want to add a table, right-click, and select **Insert > Table**. The New Table Parameters window opens.
2. Type the number of rows to include in the table.
3. Type the number of columns to include in the table.
4. Click **OK**.

Inserting Pictures

1. Place your cursor in the location where you want to add a picture, right-click, and select **Insert > Picture** (or **Picture and Description**). The Select Image File to Insert window opens.
2. Browse to the image (picture) you want to add to the document template and click **Open**. The image (picture) will be added to the template.
3. To resize an image:
   a. Left-click the image.
   b. Rest your cursor on the handle in the corner of the image until your cursor becomes a double-pointed arrow.
   c. Left-click the handle and drag it to resize the image to the size you want.

Do not copy and paste images. Use only the **Insert > Picture** or **Insert > Picture and Description** method.

Inserting Page Breaks

1. Place your cursor in the location where you want to add a page break and right-click.
2. Select **Insert > Page break**. The page break is added at the cursor's location.

Inserting Bookmarks

1. Place your cursor in the location where you want to add a bookmark and right-click.

   If inserting a bookmark within a table cell, select **Insert > Bookmark** on the menu or click the **Bookmark** button on the editor toolbar. Right-clicking in a table cell opens a table menu.

2. From the right-click menu, select **Insert > Bookmark**.
3. From the **File Description** list, select the appropriate type of file.
4. From the **Field Description** list, select the appropriate type of field.
5. If applicable, update the name in the **Bookmark** box.
6. Click **Add Bookmark**.

Do not copy and paste bookmarks. This will "break" the bookmark and could create "protected text" errors in the Cornerstone database.

tip See the Appendix for a list of all document bookmarks.

Inserting Check Boxes

1. Place your cursor in the location where you want to add a check box and right-click.
2. From the right-click menu, select **Insert > Check Box**. You can type a corresponding name to appear next to the check box.

Inserting Text Input Fields

1. Place your cursor in the location where you want to add a text input field and right-click.
2. From the right-click menu, select **Insert > Text Input**.
3. In the **Field Name** box, type a name for the field.
4. In the **Initial Data** box, type any initial data.
5. In the **Maximum Field Length** box, type the maximum number of characters for the field.

   tip Leave the **Maximum Field Length** box blank to allow unlimited text.

6. Click the **Font** button to customize the font, and then click **OK**.
7. Click **OK**.

Inserting Links

You can add the following links: Problem Description, Problem Details, Diagnosis Description, Diagnosis Details, and Vital Signs.

1. Place your cursor in the location where you want to add a link and right-click.
2. From the right-click menu, select **Insert** and then select the appropriate link.

Vaccination Preferences

Vaccination preferences allow vaccination information to be included on vaccination certificates, health certificates, and other similar documents.

1. Select **Controls > Defaults > Practice and Workstation > Vaccination Bookmarks**.
2. Select the vaccinations to appear on vaccination certificates, health certificates, and other similar documents.
3. In the **Vaccination line pattern** area, select the buttons in the order in which the information should print on documents.
4. Click **OK**.
5. You can now insert a bookmark (Reminder Info or Vaccinations–Use Preferences) into a document template.

    The Reminder Info bookmark lists all items from the Vaccinations bookmark and also inserts dates based on patient history. The Vaccinations bookmark lists only items and dates from the vaccination bookmark list currently on the patient reminder file.

Access the Cornerstone Online Community

Check out all of the medical note templates available for download at community.idexx.com.

Importing a Document Template

Import templates from the Cornerstone* Online Community using the Import Document Templates feature.

1. On the **Tools** menu, select **Import Document Templates**.
2. If you have not already downloaded the document template to import, click the **Cornerstone Community** link and download the template file to the Downloads folder in your Cornerstone directory (for example: C:\Cstone \Downloads).
3. On the Import Document Template window, click **Browse** and select the document template (.csz file) to import.
4. If a template with the same name already exists on your system, a message asks if you want to continue with the import. If you click **Yes**, a number is appended to the new template name (“Eye Exam” will be changed to “Eye Exam (1)”). If you click **No**, the currently selected template will not be imported. Click **Browse** to select a different template or click **Cancel** to close the dialog box without importing a template.
5. Click **Import Template**. A message displays to inform you that the import was successful.
6. The next time you open the Document Template List window, the imported template will be available for selection in the Samples category.

If the Document Template List window is open while you import the template, you will need to close the Document Template List window and reopen it to see the new template in the list.

Once you have document templates set up, you can use them by accessing Correspondence or Medical Notes through the menu bar, toolbar, and right-click menus.
To automate document templates, link them to:

- Reason for Visit as a check-in/out document.
- Invoice items with the Print Document special action.
- Diagnostic codes.

Chapter Summary

You learned these important concepts in this chapter:

- **Document Template Overview—**Document template benefits, types, and sample listings of correspondence and medical notes you may want to create.
- **Windows and Features for Creating Document Templates**—Become acquainted with the windows to select and modify the document templates, including the toolbars to add elements that make the document easy to use, such as text input fields, check boxes, bookmarks, tables, and images.
- **Template Properties and Save Properties**—Options that control how a document is saved in history, managed, and printed.
- **Other Procedural Steps**

Electronic Medical Records Default Settings

You'll learn these important concepts in this chapter:

- **Default and Security Settings Guide Overview**—Gain knowledge of the *Default and Security Settings Guide*.
- **Recommended Security Settings for Electronic Medical Records**—Learn key security settings for electronic medical records.
- **Default Settings for Electronic Medical Records**—Successfully access defaults for electronic medical records and the Electronic Whiteboard window.

Default and Security Settings Guide Overview

Creating a secure environment for your electronic medical records (EMR) is extremely important. As you move through the setup process, it is extremely important that you look more deeply into your security to prevent data compromises.

This training guide contains portions of the *Default and Security Settings Guide* that apply to electronic medical records.

tip Go to idexxlearningcenter.com to view the current version of the *Default and Security Settings Guide*.

Recommended Security Settings for Electronic Medical Records

This list outlines the key security settings for using electronic medical records:

- Compliance
- Correspondence—Finalize (all or key staff)
- Departing Instruction Setup
- Defaults—Practice
- Defaults—Staff
- Diagnostic Code Setup (doctors, medical team for on-the-fly entry with medical notes)
- Document Template Setup
- Documents—Void
- Import Document Template
- Invoice Item Information
- Medical Notes—Finalize (all medical team)
- Patient Diagnosis (all medical team)
- Patient Hospital Status Information
- Patient Vaccine Information
- Patient Vaccine Corrections (key staff)
- Prescription Instruction Setup
- Problem List Information (doctors, medical team for on-the-fly entry)
- User Defined Prompt Setup
- Vital Sign Setup
- Vital Signs—Add, Edit, Void
- Whiteboard Information/Setup/Override Items
- Whiteboard Remove Patient
- Whiteboard Undo Treatment
- Ward/Loc Information

Discussion Questions:

1. Where do I locate the "Security Settings" section of the *Default and Security Settings Guide*?
2. How do I find out about updates or changes to security?
3. Why is security so important?
4. What is an example of a setup area related to EMR that may be compromised if security is not properly managed?

Default Settings for Electronic Medical Records

The “Default Settings” section of the *Default and Security Settings Guide* outlines the default settings that must be addressed and the order in which they must be addressed once the database is loaded. The defaults are located on the Cornerstone* **Lists** and **Controls** menus. Use the guide to make database decisions prior to establishing default settings. To complete the information listed in this guide, a staff person must be set up and proper security access must be granted.

How the Default Settings Tables are Organized

This document uses a table format to present the steps that you need to follow to set up the IDEXX Cornerstone* Practice Management System. Here's a key to how these tables are organized:

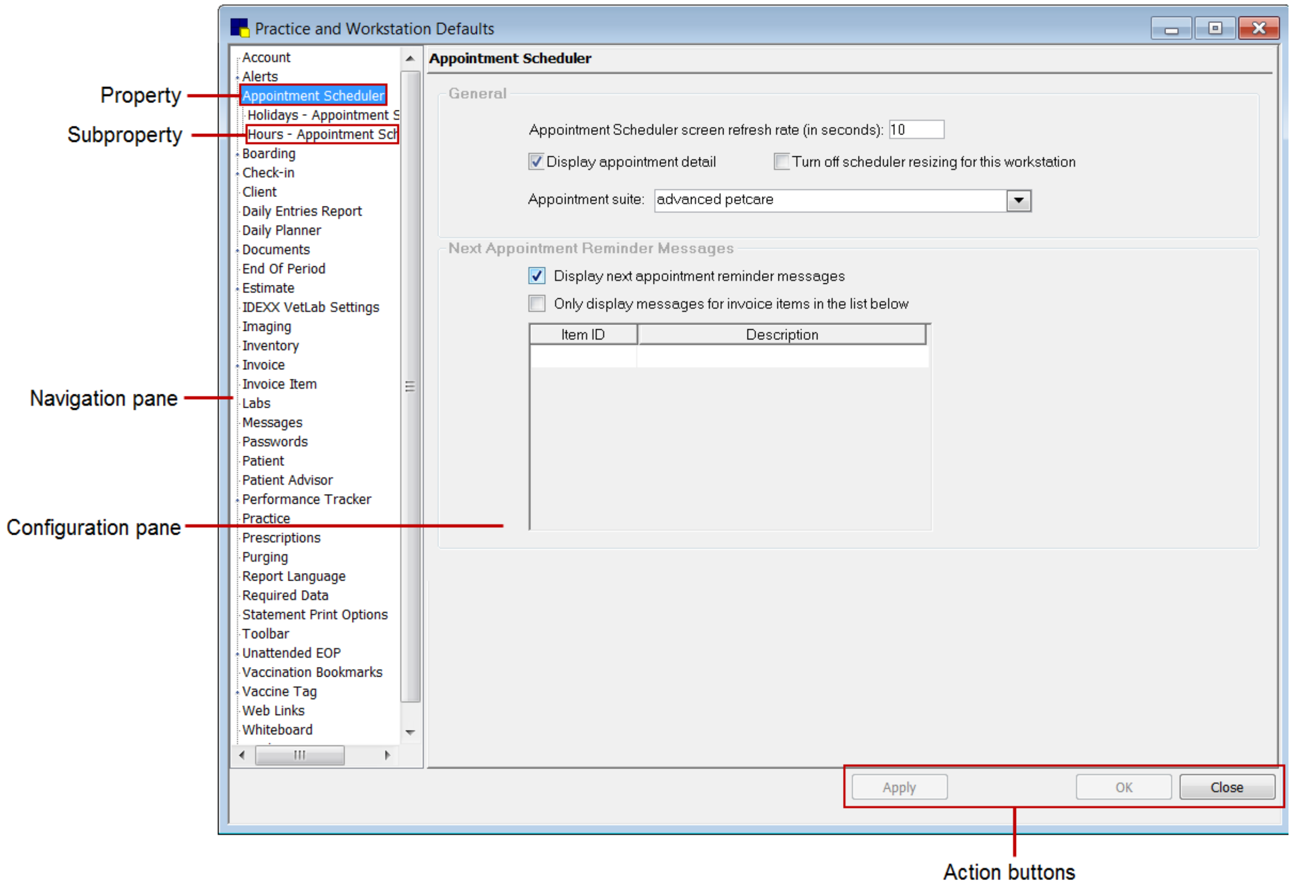
- **Menu Access** lists the selections you need to make, starting at the Cornerstone menu bar. For example, “**Controls > User Defined Prompts > Client**” means to select **Controls** from the menu bar, then select **User Defined Prompts**, and then select **Client**. In some cases, the last selection may be a tab within a window or dialog box.
- **Description** tells you about the dialog box, window, or window area and what you should do there.

Additional Information

Additional information about all of windows in Cornerstone are available in the Help. With the window open, press F1 to open the applicable Help topic.

Practice and Workstation Defaults Window

This window simplifies your initial Cornerstone setup and saves you time when looking for a particular default setting.



Accessing Practice and Workstation Defaults

1. On the menu bar, select **Controls > Defaults > Practice and Workstation**.
2. The navigation pane on the left side of the window lists the available properties that you can configure. A plus sign **[+]** box to the left of a property indicates that it has one or more associated subproperties; click the **[+]** box (or the property) to expand its list of subproperties. Select the property or subproperty to configure. The corresponding configuration pane displays on the right.
3. Depending on your actions, the following buttons may be available on the bottom of the Practice and Workstation Defaults window:
   - **Apply**—Applies any changes made since the last time **Apply** was clicked and leaves the Practice and Workstation Defaults window open so you can view and change additional properties as needed.
   - **OK**—Applies any changes and closes the Practice and Workstation Defaults window.
   - **Cancel**—If any changes have been made, you are prompted to save the changes, and then the Practice and Workstation Defaults window is closed. (Any previous changes that were applied using the **Apply** button are retained, not cancelled.)
   - **Close**—Closes the Practice and Workstation Defaults window (displays in place of the **Cancel** button if no changes have been made or if changes have been applied).

Discussion Questions:

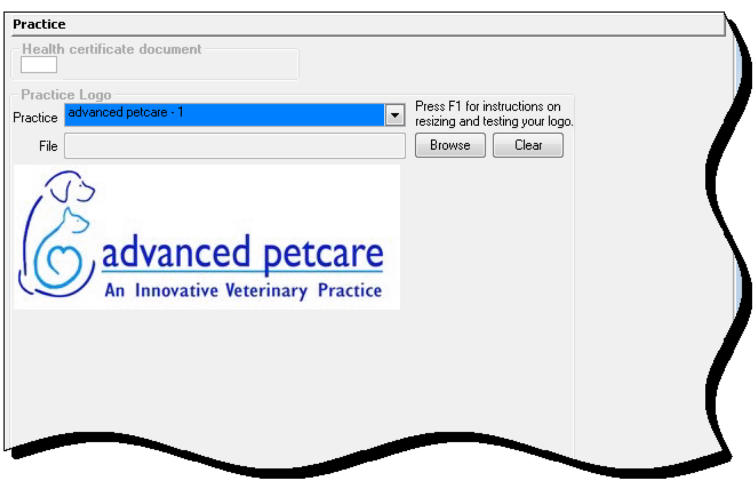
1. Where do I locate the “Default Settings” sections of the *Default and Security Settings Guide*?
2. How do I find out about updates or changes to defaults?
3. How will changes affect the appearance of my past records?

Electronic Medical Records—Default Settings Table

Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Practice *See figure CC*	Health certificate document	Press F2 to search for and select the document to use as your health certificate document.
	Practice Logo	Select the practice (for multiple practices) for which you want to add the practice logo. **Click Browse** to select the practice log file. Click **Clear** to clear the practice log and select a different one.

Figure CC

(Controls > Defaults > Practice and Workstation > Practice)



<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="5">Estimate
See figure C</td><td>Staff ID</td><td>Enter the staff ID to appear on new estimates.</td></tr>
<tr><td>Number of days to store unsigned estimates</td><td>Both finalized and tentative unsigned estimates will remain in the system the number of days selected and then will disappear. If an estimate is finalized and a patient visit list is created, that list will not be removed until the items are either invoiced or deleted. This option is only a default setting when saving and can be overridden when saving an estimate.</td></tr>
<tr><td>Finalize estimate</td><td>Select this check box to default an estimate’s status to final when saving estimates. When creating an estimate, you have the option of changing the selection of the finalize estimate check box. Finalizing an estimate means that no changes can be made to its contents. Finalizing also creates an entry on the Patient Visit List (PVL) window for the charges listed.</td></tr>
<tr><td>Transfer to Patient Visit List when finalized</td><td><table>
<tr><th>Low prices</th></tr>
<tr><td>Select this option to transfer the low prices from an estimate to the Patient Visit List.</td></tr>
<tr><th>High prices</th></tr>
<tr><td>Select this option to transfer the high prices from an estimate to the Patient Visit List.</td></tr>
<tr><th>Add invoice items to PVL</th></tr>
<tr><td>Select a practice-wide default specifying if invoice items should automatically be added to the Patient Visit List from a finalized estimate.</td></tr>
</table></td></tr>
<tr><td>Estimate print</td><td><table>
<tr><td># copies</td><td>Enter the number of estimate copies you want to print. This option is a default setting only when the user can override printing when printing an estimate.</td></tr>
<tr><td>Print staff name</td><td>Select this check box to print the staff name on estimates. The name will print as it displays in the Staff List window.</td></tr>
<tr><td>Print item ID</td><td>Select this check box to print invoice item IDs on estimates.</td></tr>
<tr><td>Use authorizing signature</td><td>Select this check box if you want the option to have clients provide electronic signatures on estimates.

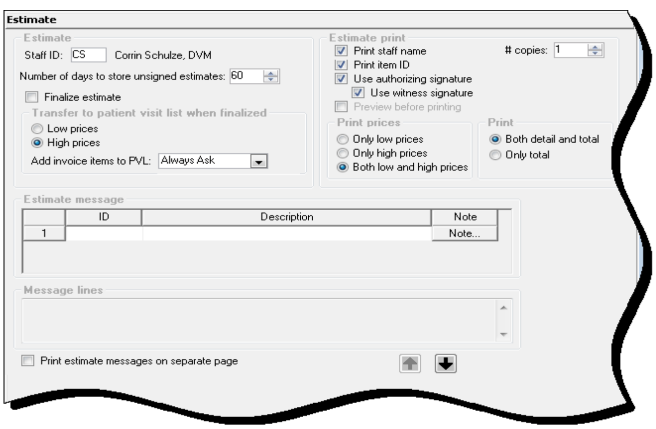
This setting also determines which option is selected by default on the Save Estimate dialog box—Preview/Signature (if check box is selected) or Save and continue (if check box is not selected).</td></tr>
<tr><td>Use witness signature</td><td>Select this check box if you want the option to capture an electronic witness signature; a witness signature line is added to the estimate.</td></tr>
<tr><td>Preview before printing</td><td>This check box is enabled if the Use authorizing signature check box is cleared. Select this check box to allow the Print Preview window for estimates to appear before printing an estimate. With the Print Preview window, you can complete the following estimate processing tasks in a single window:
View the estimate at different zoom levels.
Specify the number of days to keep an unsigned estimate (signed estimates are automatically finalized and saved to patient history).
Finalize an estimate.
Print an estimate.
Email an estimate.
Obtain an electronic signature and optional witness signature on an estimate (requires a connected signature capture device or a tablet PC).</td></tr>
</table></td></tr>
</table>

Controls > Defaults > Practice and Workstation

Menu Access	Default	Description
Estimate *See figure C (continued)*	Print prices	**Print prices**—Only low prices: Select this option to print only the low prices on the estimate. **Print prices**—Only high prices: Select this option to print only the high prices on the estimate. **Print prices**—Both low and high prices: Select this option to print both low and high prices on the estimate. **Print**—Both detail and total: Select this option to print the estimate detail and total. **Print**—Only total: Select this option to print only the estimate total.
	Estimate message	Combine multiple estimate messages to use as the default message that prints on the estimate. Estimate messages can be changed as estimates are created. Originates from **Controls > Estimate Messages**.
	Print estimate messages on separate page	Select this check box to print all estimate messages on a separate page from the invoice, usually following the last printed page of the invoice.

Figure C

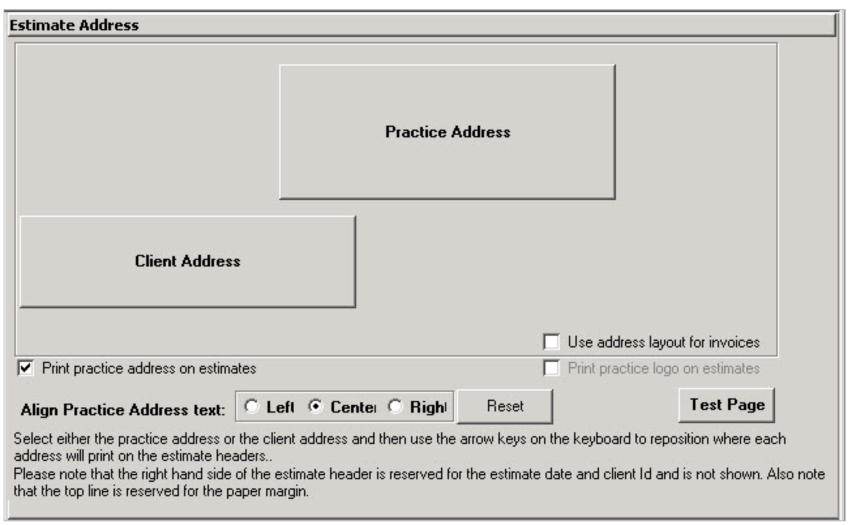
(Controls > Defaults > Practice and Workstation > Estimate)



Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Estimate > Estimate Address *See figure C-1*	Client Address	To adjust the placement of the client address on the estimate when using window envelopes, click the **Client Address** box and use the arrow keys on your keyboard to adjust the location.
	Print practice address on estimates	Select this check box to print the practice address on estimates. If you are using letterhead or preprinted paper, clear the check box.
	Practice Address	To adjust the placement of the practice address on the invoice when using window envelopes, click the **Practice Address** box and use the arrow keys on your keyboard to adjust the location.
	Align Practice Address text	Select an alignment option for the practice address text on estimates.
	Reset	Click this button to reset the alignment for address text.
	Use address layout for invoices	Select this check box to use this address layout for invoices.
	Print practice logo on estimates	Select this check box to print the practice logo on estimates.
	Test Page	Click this button to print a test page.

Figure C-1

(Controls > Defaults > Practice and Workstation > Estimate > Estimate Address



<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="10">Invoice
See figure D</td><td>Staff ID</td><td>Enter the staff ID to appear by default on a new invoice. If you have multiple staff members, it may be best not to default to a staff member. Not selecting a default staff ID will require staff to choose the appropriate provider at the time of invoicing.</td></tr>
<tr><td>Invoice type</td><td>Select the invoice type to appear by default on a new invoice.</td></tr>
<tr><td>Display patient visit message</td><td>Clear the Display patient visit message check box if you want the Patient Visit List window to automatically appear when items exist on the Patient Visit List for any patient belonging to the client that you’re invoicing. If this option is selected, a message will display, asking if you want to select items from the list.</td></tr>
<tr><td>Automatically mark patient as deceased</td><td>Select this check box to automatically change a patient’s status to Deceased when they are invoiced for an item with the Mark as Deceased special action.</td></tr>
<tr><td>Apply group item pricing before dispensing fee and minimum price</td><td>Select this check box if your practice gives discounts on invoice item groups and you want to exclude dispensing fees from the discount. This can be changed per item later if necessary.</td></tr>
<tr><td>Prompt for call back note</td><td>Select this check box to display a call back note during invoicing. This option will allow staff to enter specific callback information at the time of invoicing so it is available to the staff making the call at a later time. The invoice item must be set to generate a call back reminder.</td></tr>
<tr><td>Display below reorder point warning</td><td>Clear this check box to prevent an alert box from displaying when an item that is below the reorder point is placed on an invoice.</td></tr>
<tr><td>Omit duplicate special action documents</td><td>Select this check box to prevent duplicate documents from printing.</td></tr>
<tr><td>Use controlled substance reasons</td><td>Select this check box to allow the display of items from the Controlled Substance Reason List on invoices. Items must be marked as a controlled substance for this feature to work.

Originates from Controls > Controlled Substance > Controlled Substance Reasons.</td></tr>
<tr><td>Invoice print</td><td>
<table>
<tr><td>Print heading</td><td>Clear this check box if you do not want your practice information to appear at the top of invoices.

This is usually done if you are using letterhead or preprinted paper instead of plain paper for printing invoices or estimates.

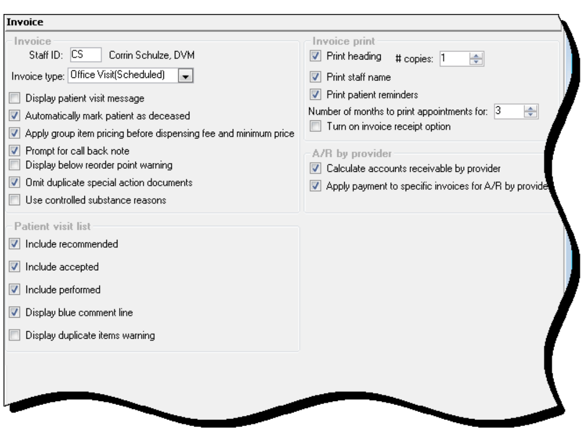
Originates from Lists > Practice.</td></tr>
<tr><td># copies</td><td>Enter the number of invoice copies you want to print.</td></tr>
<tr><td>Print staff name</td><td>Select this check box to print the provider name on invoices. The name will print as it displays in the Staff List window.</td></tr>
<tr><td>Print patient reminders</td><td>Select this check box if you want patient reminders to print on the invoice.</td></tr>
<tr><td>Number of months to print appointments for</td><td>Enter the number of months to include for printing future appointments for a client’s active patients on the bottom of invoices.</td></tr>
<tr><td>Turn on invoice receipt options</td><td>Select this check box to allow the user to print 3⅛” receipts instead of full-page invoices. The receipt does not include client information and does not list invoices items by patient. This option requires an EPSON® TM-T88IV receipt printer.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th colspan="3">Controls > Defaults > Practice and Workstation</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="3">Invoice
See figure D
(continued)</td><td>Calculate accounts receivable by provider</td><td>If you pay your providers based on collected accounts receivable, select this check box. If you do not pay your providers this way, do not activate this option.
<table>
<tr><th colspan="2">Use this feature if:</th></tr>
<tr><td>Doctors are paid by commission</td><td>If yes, how much?</td></tr>
<tr><td>Doctors are paid only by production

Doctors are paid by money received on production?</td><td>The percentage the doctor earns on the money received on production.</td></tr>
</table></td></tr>
<tr><td>Apply payment to specific invoices for A/R by provider</td><td>Select this check box to always apply payments received to a specific invoice. We recommend that this check box not be selected. Then, the payment on the invoice will be applied to the oldest balance first. Unless you selected the previous option (Calculate accounts receivable by provider), skip this option. You must select this option if you want to print an A/R report by provider as part of your End of Month.</td></tr>
<tr><td>Patient Visit List</td><td>
<table>
<tr><td>Include recommended</td><td>Select this check box if you want items with a Recommended status to be automatically selected to transfer to an invoice and to be included in the total displayed on the Patient Visit List (PVL) window.</td></tr>
<tr><td>Include accepted</td><td>Select this check box if you want items with an Accepted status to be automatically selected to transfer to an invoice and to be included in the total displayed on the Patient Visit List.</td></tr>
<tr><td>Include performed</td><td>Select this check box if you want items with a Performed status to be automatically selected to transfer to an invoice and to be included in the total displayed on the Patient Visit List.</td></tr>
<tr><td>Display blue comment line</td><td>Select this check box if you want the blue comment lines to appear on the Patient Visit List.</td></tr>
<tr><td>Display duplicate items warning</td><td>Clear this check box if you do not want this warning window to appear. The items will still show in a maroon color.</td></tr>
</table></td></tr>
</table>

Figure D

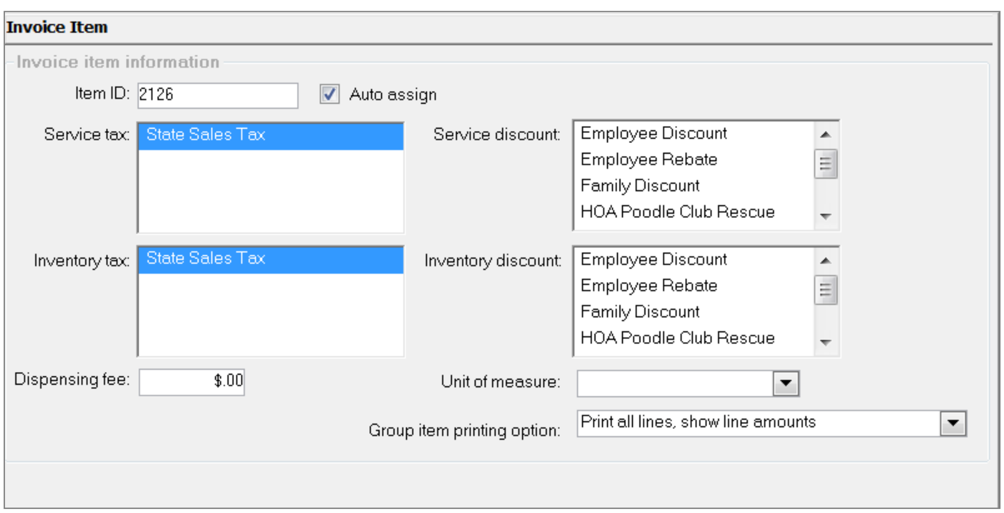
(Controls > Defaults > Practice and Workstation > Invoice



Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Invoice Item *See figure E*	Item ID	To automatically assign item IDs, enter the starting item ID number.
	Auto assign	Select this check box to automatically assign an item ID when a new item is added.
	Service tax	Select a default service tax rate to be used with any new service item created. Originates from **Controls > Taxes**.
	Inventory tax	Select a default inventory tax rate to be used with any new inventory item created. Originates from **Controls > Taxes**.
	Dispensing fee	If you have a default dispensing fee, enter it here to add the fee to any new inventory items that will be dispensed.
	Service discount	Select any service discounts to be used with any new service item created.
	Inventory discount	Select any inventory discounts to be used with any new inventory item created.
	Unit of measure	Select a default unit of measure for any new inventory item created.
	Group item printing option	Set a default option for the way groups are displayed when printed. Options are: • Print all lines, show line amounts • Print all lines, show group total amount • Print detail lines only • Print group line only This setting can be changed per group when the groups are created.

Figure E

(Controls > Defaults > Practice and Workstation > Invoice Item)

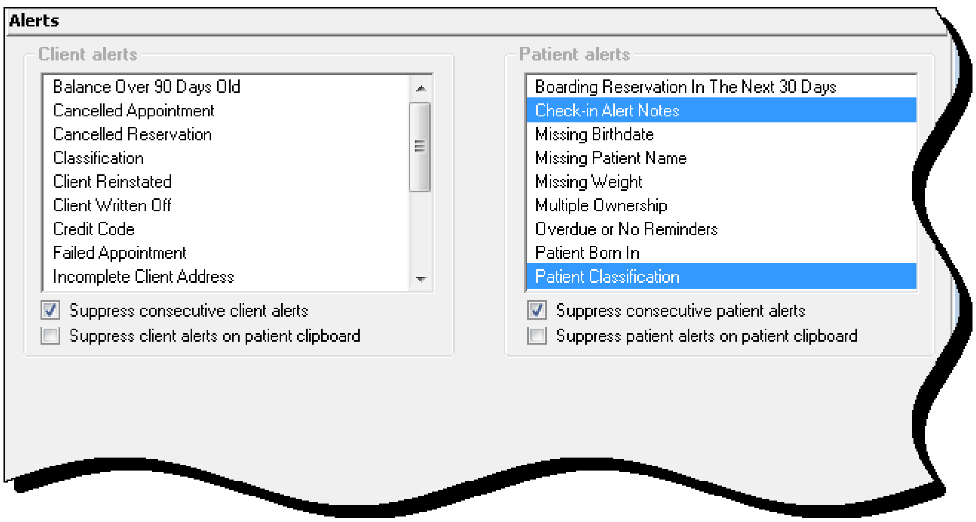


Controls > Defaults > Practice and Workstation

Menu Access	Default	Description
Alerts *See figure J*	Client alerts	Select the client alert items you want to display as alerts for the client. Selected items are highlighted in blue.
	Suppress consecutive client alerts	Select this check box if you want the alerts to display only once per client, per day.
	Suppress client alerts on Patient Clipboard	Clear this check box to display alerts when a client is accessed from the Patient Clipboard* window.
	Patient alerts	Select the patient alert items you want to display as alerts for the patient. Selected items are highlighted in blue.
	Suppress consecutive patient alerts	Select this check box if you want the alerts to display only once per day.
	Suppress patient alerts on Patient Clipboard	Clear this check box to display alerts when a patient record is accessed from the Patient Clipboard.

Figure J

(Controls > Defaults > Practice and Workstation > Alerts)



Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Alerts > Compliance Alerts *See figure K*	Compliance alerts	If using the Compliance Assessment Tool*, select protocols for which you want alerts to display.
	Display predefined IDEXX protocols	Cornerstone software has predefined a number of protocols that can be used. Select this check box to display alerts for these protocols.
	Display compliance alerts	If using the Compliance Assessment Tool, select where in Cornerstone you want the alerts to display.
Check-in *See figure L*	Reason for visit	Select a default reason for visit to appear in new appointments. Originates from **Controls > Reason for Visit**.
	Default room	Select a default room to appear in a new appointment.
	Staff ID	Enter a default staff ID that to appear in a new appointment. Leave blank if you do not want to use a default staff ID.
	Verify check out	Select this check box if you want to be prompted to verify check out when you click **Check-out** on the Census List or the Check-in window.
	Use check-in date for compliance	Select this check box if you want to use the patient's check-in date for compliance within the Compliance Assessment Tool. If this check box is not selected, all patients will be counted in calculating compliance, even if they only came in to purchase food.

Figure K

(Controls > Defaults > Practice and Workstation > Alerts > Compliance Alerts)

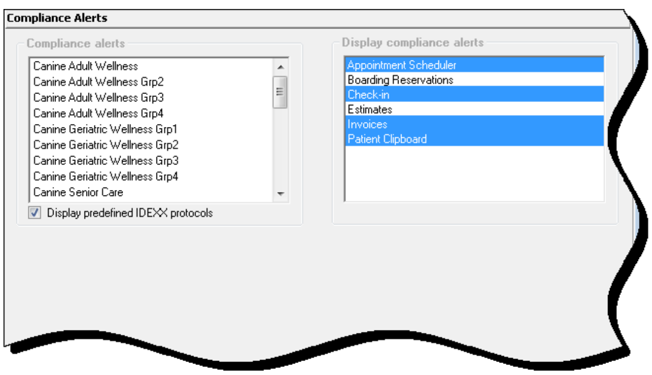
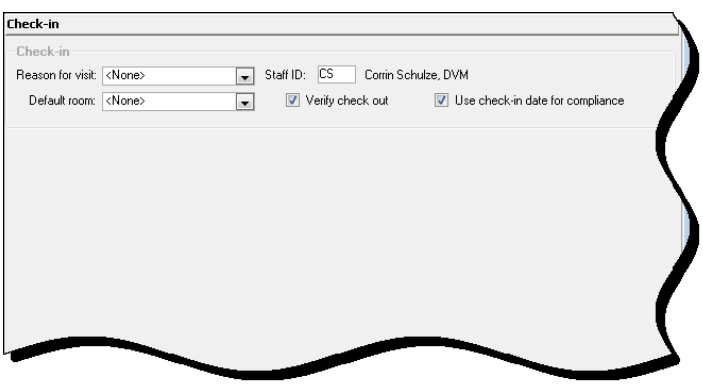


Figure L

(Controls > Defaults > Practice and Workstation > Check-in)



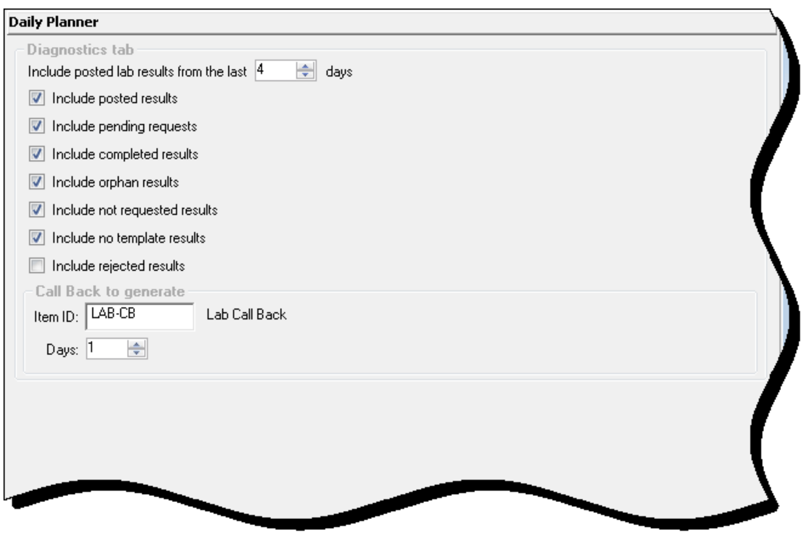
Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Check-in > Check-in Print Options	Information to print	This window allows you to decide what information will print on the Check-in Report. For most selected items you can designate a date range (e.g., All, Last month, Last three months, etc.). See the table below to view the check-in item and any specific date ranges.

Print Option	Date Range	Check-in Item	Date Range
Billing information	All, Last 3 (6, 12, 18, 24) months	Lab results	All, Last 3 (6, 12, 18, 24) months
Client referrals		Expand lab results	N/A
Medical notes		Images	All, Last 3 (6, 12, 18, 24) months
		Image cases	
Hide Whiteboard notes	N/A	Patient referrals	
Departing instructions	All, Last 3 (6, 12, 18, 24) months	Call backs	
Reminders	All, Due in 1 (3, 6, 12) months	Problems	
Weight/Body score	All, Last 3 (6, 12, 18, 24) months		
Vital Signs			
Diagnostic codes			
Appointments	All, Due in 1 (3, 6, 12) months	Hide voided items	N/A
Exams	All, Last 3 (6, 12, 18, 24) months	Print birth date as age	N/A
Patient prompts	N/A	Communications	All, Last month, Last 3 (6, 12, 18, 24) months
		Print check-in report	Always Ask, Always Print, Never Print
Prescriptions	All, Last 3 (6, 12, 18, 24) months	Print history in date order	N/A
		# of lines of history to print __________	All, 1–100

Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Daily Planner *See figure MM*	Diagnostics tab	Select the **Include posted lab results from the last ___ days** check box and enter the number of days for including posted results on the Diagnostics tab of the Daily Planner. Select each check box to include those results: • Include posted results • Include pending requests • Include completed results • Include orphan results • Include not requested results • Include no template results • Include rejected results
	Call Back to generate	• Enter the default invoice item ID you have set up for laboratory callbacks. • Enter the default number of days before a laboratory callback is due.

Figure MM

(Controls > Defaults > Practice and Workstation > Daily Planner)



Controls > Defaults > Practice and Workstation

Menu Access	Default	Description	
Documents *See figure V*	Medical Note options	Display partial medical note in correspondence (classic only)	Select the check box for **Display partial medical notes in Correspondence** to be able to select which information from your medical note templates to include in correspondence documents where medical note bookmarks are being used.
		Medical Note must be finalized before patient can be checked out	Select the check box for **Medical Note to be finalized before patient can be checked out** if you want medical notes to be finalized prior to patient check out.
		Auto finalize after ___ days	Select the number of days before the medical notes will be automatically finalized.
		Ask for weight if last entry is older than ___ days	Select the number of days for the computer to prompt for a weight entry.
	Default templates	For new templates use	Select the Medical Note template you want to use as a default.
		For Medical Note Quick Text documents use	Select the Quick Text Medical Note you want to use as a default.
	Include invoice items when printing Medical Notes	Select this check box to include invoice items when printing medical notes. Select the **Also include** check box to add the following options: **Declined item**, **Amount**, and **Staff ID**.	
	Include invoice items when printing Correspondence	Select this check box to include invoice items when printing correspondence documents. Select the **Also include** check box to add the following options: **Declined item**, **Amount**, and **Staff ID**.	

Figure V

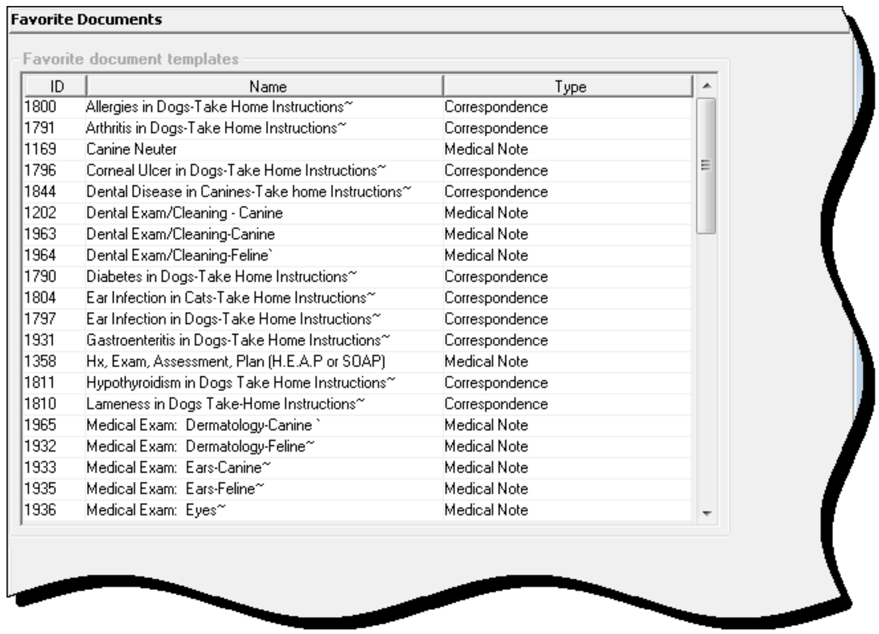
(Controls > Defaults > Practice and Workstation > Documents)

Controls > Defaults > Practice and Workstation

Menu Access	Default	Description
Documents > Favorite Documents *See figure W*	Favorite document templates	In the first empty ID field, enter the document ID of the medical note or correspondence documents you would like to include on your Favorites list. (**Lists > Documents > Templates**).

Figure W

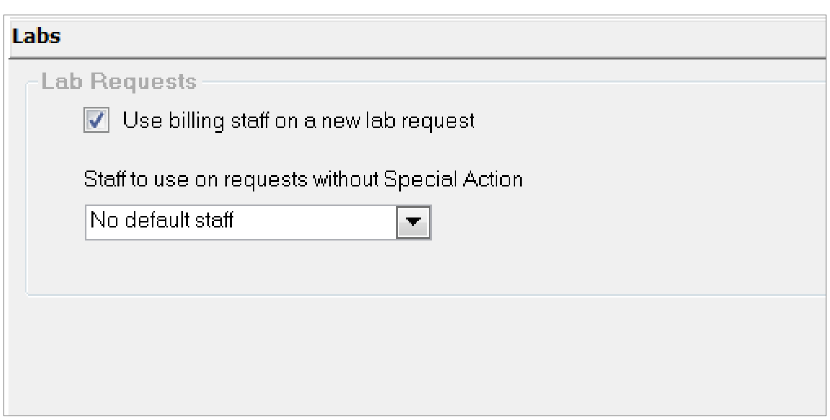
(Controls > Defaults > Practice and Workstation > Documents > Favorite Documents)



Menu Access	Default	Description
Labs *See figure LB*	Use billing staff on a new lab request	Select this check box to designate that the billing staff on the Patient Visit List or the invoice should be used as the default staff ID on the request. If this check box is not selected, the default staff ID for special action requests is the last staff member who performed a lab request on the workstation.
	Staff to use on requests without Special Action	Select the staff to use for lab requests not associated with special actions. Options are **No default staff**, **Last staff used on workstation**, or **Specific staff** (enter staff ID).

Figure LB

(Controls > Defaults > Practice and Workstation > Labs)

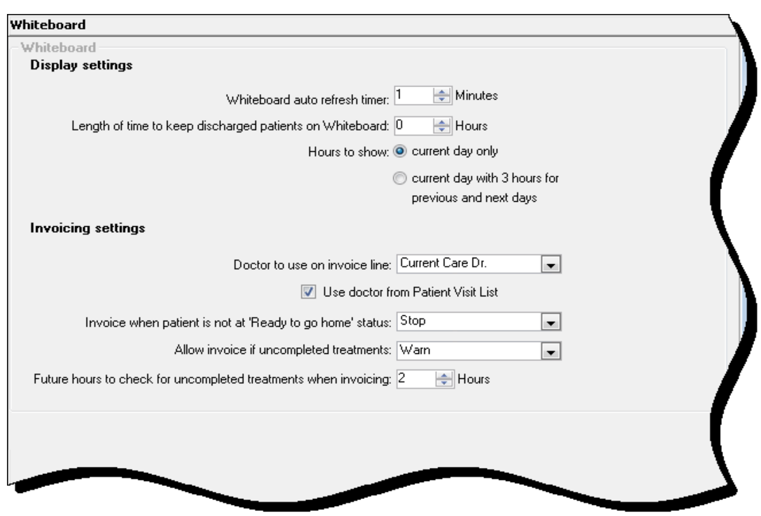


Controls > Defaults > Practice and Workstation

Menu Access	Default	Description
View a snippet online demonstration **Whiteboard** *See figure LL*	Whiteboard auto refresh timer ____ Minutes	Enter a number (in minutes) for how often the Electronic Whiteboard should automatically refresh.
	Length of time to keep discharged patients on Whiteboard ____ Hours	Enter the number of time (in hours) to keep patients on the Electronic Whiteboard.
	Hours to show	Select one of the following options for how many hours to show on the Electronic Whiteboard: • Current day only • Current day with 3 hours for previous and next days
	Doctor to use on invoice line	Select a default doctor to use on the invoice line. Options are **Supervising Dr., Current Care Dr.**, or **Who Performed**. The supervising and current care doctors are determined at the time orders are written. Performing staff is determined at the time items are marked completed.
	Use doctor from Patient Visit List	Select this check box if you want the staff from the Patient Visit List invoice item lines to transfer as the doctor for the patient orders.
	Invoice when patient is not at "Ready to go home" status	Determines under which circumstances a staff member is allowed to invoice a client for a patient who is still in the Not ready to go home status on the Electronic Whiteboard. Options are **Allow**, **Manager Override**, **Stop**, and **Warn**.
	Allow invoice if uncompleted treatments	Determines under which circumstances a staff member is able to invoice a client when a patient has treatment on the Electronic Whiteboard that has not been marked complete. Options are **Allow**, **Manager Override**, **Stop**, and **Warn**.
	Future hours to check for uncompleted treatments when invoicing ____ Hours	Enter the number of hours in the future to check for uncompleted treatments when invoicing.

Figure LL

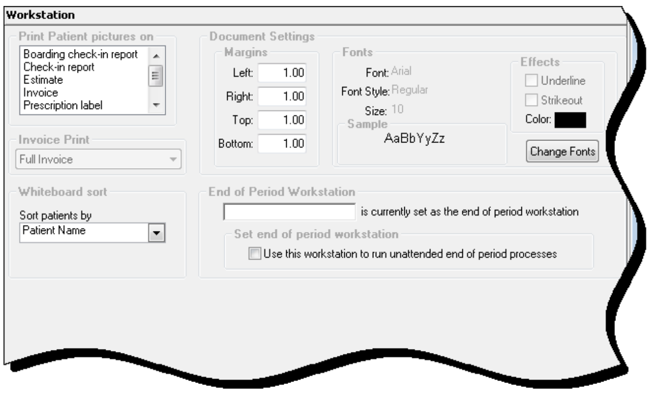
(Controls > Defaults > Practice and Workstation > Whiteboard)



Controls > Defaults > Practice and Workstation		
Menu Access	**Default**	**Description**
Workstation (Defaults are set per workstation) *See figure R*	Print Patient pictures on	Select the client correspondence items on which to print the patient’s picture. The patient’s picture can print on the Boarding Check-in Report, Check–in Report, estimates, invoices, prescription labels, rabies certificates, and reminders.
	Whiteboard sort • Sort patients by	Select the method for sorting patients on the Electronic Whiteboard.

Figure R

(Controls > Defaults > Practice and Workstation > Workstation)

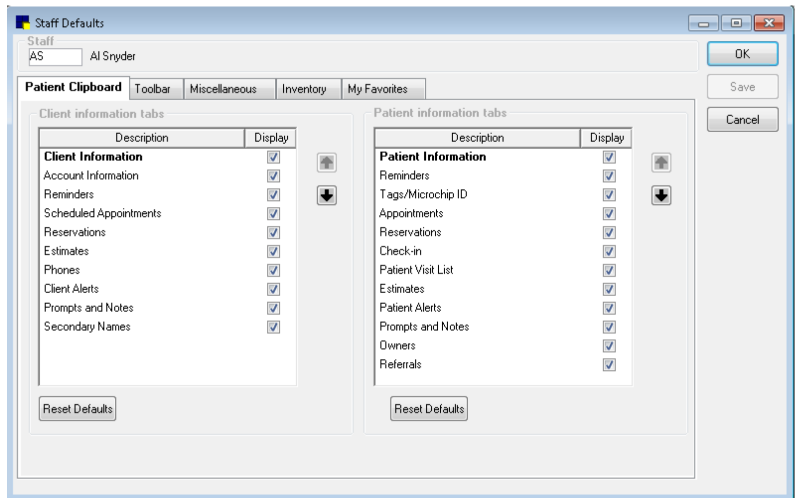


Controls > Defaults > Staff

Menu Access	Default	Description
Controls > Defaults > Staff > Patient Clipboard tab *See figure SS*	Staff	This allows the practice administrator to determine, based on staff ID or login, what is shown on the **Client information** and **Patient information** tabs on the Patient Clipboard* window. Enter the staff ID for whom you want to set default settings.
	Client information tabs Patient information tabs	In the **Display** column, select the check box for each item to display for this staff member. Use the arrows to order the items. Click **Reset Defaults** to reset the defaults to the original settings.

Figure SS

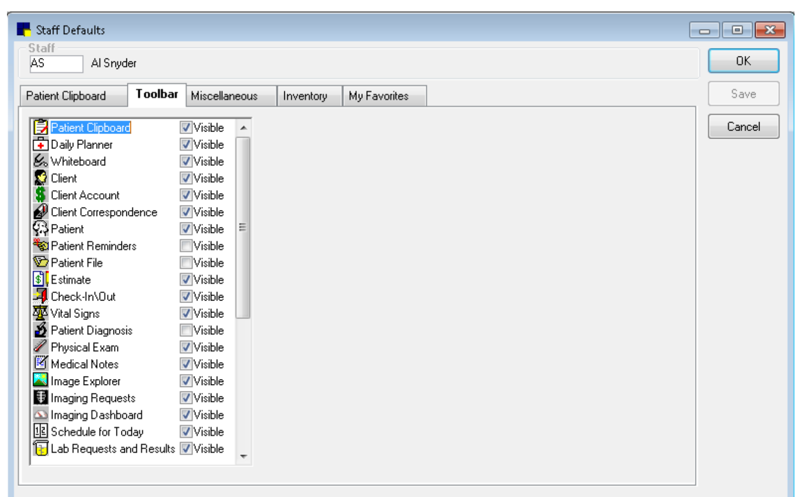
(Controls > Defaults > Staff > Patient Clipboard)



Menu Access	Default	Description
Controls > Defaults > Staff > Toolbar tab *See figure TT*	Staff ID	This allows the practice administrator to determine, based on staff ID or login, which toolbar buttons are shown on the toolbar. Enter the staff ID for whom you want to set default settings.
	Toolbar	Select the **Visible** check box next to each toolbar button to display for this staff member.

Figure TT

(Controls > Defaults > Staff > Toolbar)

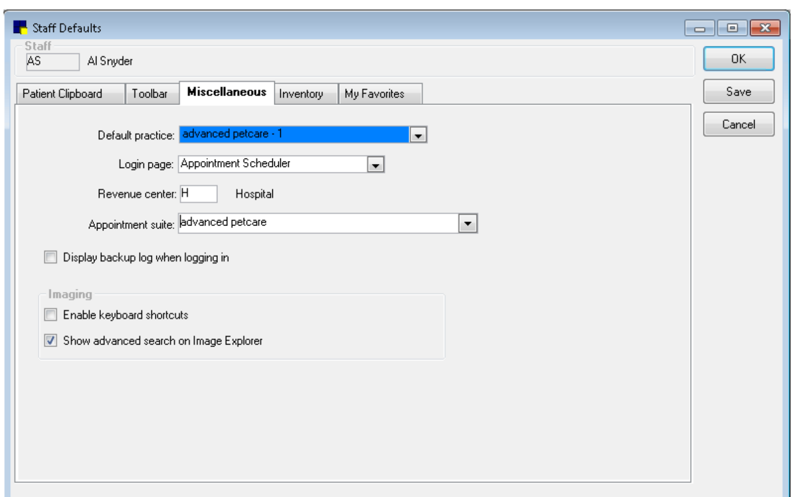


<table>
<tr><th colspan="3">Controls > Defaults > Staff</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="2">Controls > Defaults > Staff > Miscellaneous tab
See figure UU</td><td>Staff</td><td>This allows the practice administrator to determine, based on staff ID or login, the miscellaneous settings for the staff member.

Enter the staff ID for whom you want to set default settings.</td></tr>
<tr><td>Miscellaneous tab</td><td>
<table>
<tr><td>Default practice</td><td>If your practice has multiple locations, select the default practice for this staff member.</td></tr>
<tr><td>Login page</td><td>Select the default window that opens for this staff member upon login.</td></tr>
<tr><td>Revenue center</td><td>Enter the default revenue center for this staff member.</td></tr>
<tr><td>Appointment suite</td><td>Select the default appointment suite used in the Appointment Scheduler for this staff member.</td></tr>
<tr><td>Display backup log when logging in</td><td>Select this check box if you want to display the backup log when this staff member logs in.</td></tr>
<tr><td>Imaging—Enable keyboard shortcuts</td><td>Select this check box to allow this staff member to use keyboard shortcuts.</td></tr>
<tr><td>Imaging—Show advanced search on Image Explorer</td><td>Select this check box to make advance search in Image Explorer the default search type for this staff member.</td></tr>
</table>
</td></tr>
</table>

Figure UU

(Controls > Defaults > Staff > Miscellaneous tab)



<table>
<tr><th colspan="3">Controls > Defaults > Staff</th></tr>
<tr><th>Menu Access</th><th>Default</th><th>Description</th></tr>
<tr><td rowspan="2">Controls > Defaults > Staff > Inventory tab
See figure VV</td><td>Staff</td><td>This allows the practice administrator to determine, based on staff ID or login, the inventory settings for the staff member.

Enter the staff ID for whom you want to set default settings.</td></tr>
<tr><td>Inventory tab</td><td>
<table>
<tr><td>Auto save changes without prompting</td><td>If you want a “Do you want to save?” confirmation prompt to appear if the staff member switches windows without saving inventory changes first, clear the check box (recommended).

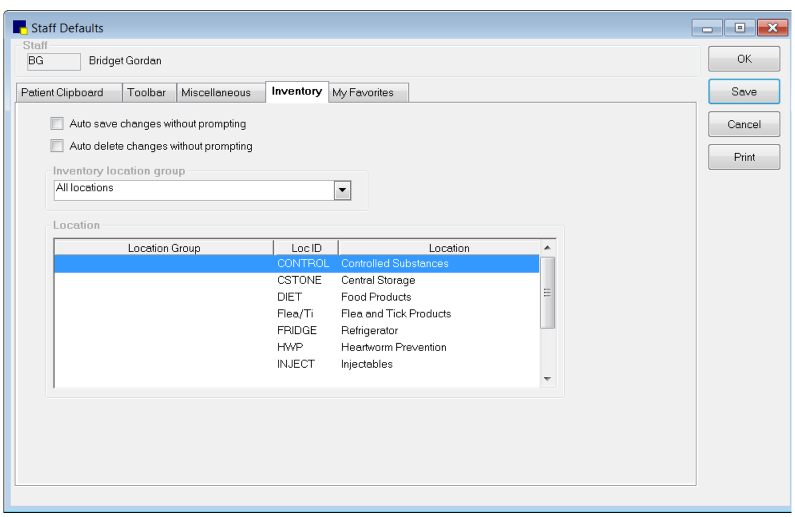
If you want the program to automatically save inventory changes the staff member makes without displaying a confirmation prompt, select the check box.</td></tr>
<tr><td>Auto delete changes without prompting</td><td>If you want a “Do you want to delete?” confirmation prompt to appear for this staff member when Delete button is clicked on any inventory window, clear the check box (recommended).

If you want the program to automatically delete within inventory (when the Delete button is clicked on any inventory window) without displaying a confirmation prompt for this staff member, select the check box.</td></tr>
<tr><td>Inventory location group

Location</td><td>If using a multi-location inventory configuration, select the default location for inventory depletion for this staff member from the list. The Location table displays information about the selected location.</td></tr>
</table>
</td></tr>
</table>

Figure VV

(Controls > Defaults > Staff > Inventory tab)

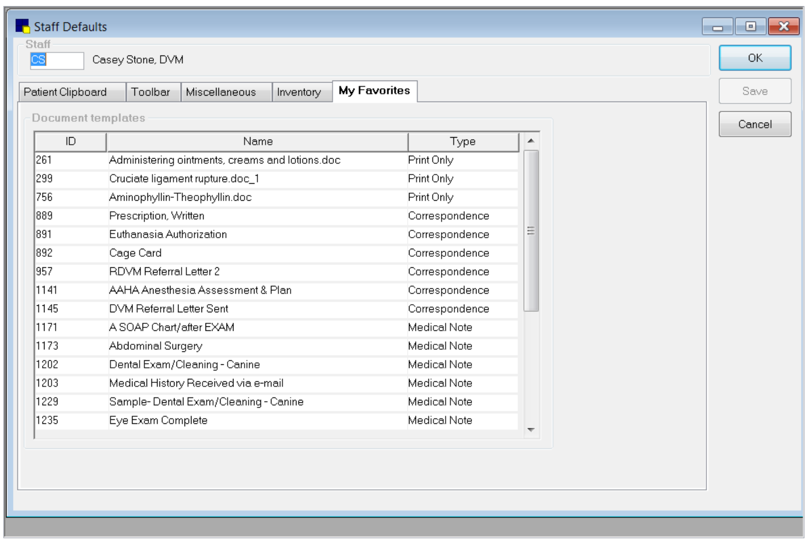


Controls > Defaults > Staff

Menu Access	Default	Description
Controls > Defaults > Staff > My Favorites tab *See figure WW*	Staff	This allows the practice administrator to determine, based on staff ID or login, documents templates that appear in the staff member's Favorites list on the Document Template List window. Enter the staff ID for whom you want to set default settings.
	My Favorites tab	To add a document template to the list, double-click in the blank row at the bottom of the list or press F2 to display the Document Template List and select the template to add to the favorites list. To remove a document template from the list, click on the template's ID in the ID column and then press CTRL+D.

Figure WW

(Controls > Defaults > Staff > My Favorites tab)



Menu Access	Description
Lists > Practice > Update	**Practice Information window—Login/Password Management** Set up login and password information for the following features. When you select a feature, the fields required for set up appear. For more information about these features, including prerequisites, see the Cornerstone Help. To access the Help for this window, press F1 while the window is open.

Antech Reference Lab Results	To set up the Antech Diagnostics® module: If you already have Antech Diagnostics module set up in Cornerstone, click **Apply Primary Practice Settings**. The account information boxes are automatically completed. If you don't have existing Antech account information, enter the information provided by Antech when you set up your account. Click the **Test** button. When the **Login Settings Passed** message appears, click **OK**.
Communications—Email	To set up email service: Select your email service; you can use your desktop email client or an SMTP (web-based) email service. If you want to use SMTP mail, you must set it up in the Imaging Configuration window. Click the link or go to **Controls > Defaults > Imaging** and select **Email** in the menu. Then, enter your email account information.
Communications—Fax	To activate IDEXX Faxing service: Select the **Use IDEXX Faxing Service** check box. Click **Accept** in the terms and conditions of use window. Upon successful activation, the system will log the user who enrolled the IDEXX Faxing Service. In the Practice Information window, the name, time/date stamp, and a link to the IDEXX Faxing terms and conditions are displayed. Note that all practices in a Multi-Location/Single Database configuration must accept the terms and conditions.
Vendor—MWI Veterinary Supply	To activate IDEXX SmartOrder* electronic inventory ordering: From the **Associated Cornerstone Vendor** list, select the practice-specific vendor to use for this service. In the **Customer Number** box, type your practice's MWI® customer number. Select the **Enable Online Ordering** check box. Click **Accept** in the Terms and Conditions of Use window, and then click **OK** when notified that the activation was successful. Click **Test** to verify that you have a working Internet connection and valid login.

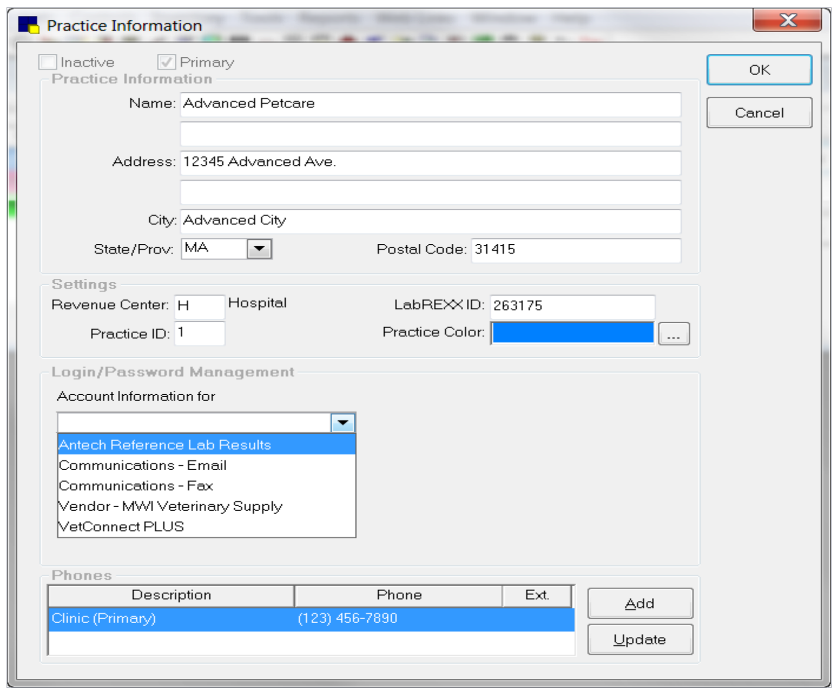
<table>
<tr><th>Menu Access</th><th>Description</th></tr>
<tr><td>Lists > Practice > Update
(continued)</td><td>
<table>
<tr><td>VetConnect PLUS</td><td>To activate IDEXX VetConnect* PLUS:

If you are a new IDEXX Reference Laboratories user, select the VetConnect option, enter your practice’s VetConnect* administrator user name and password, and then click Submit to Activate VetConnect PLUS.
OR
If you are an existing IDEXX Reference Laboratories user, the VCAgent option should already be selected and your VetConnect user name and password should be completed.

Click Submit to Activate VetConnect PLUS.

Read the agreement, and then click Accept. A message states that IDEXX Reference Laboratories historical data will be uploaded. Click Next.

IDEXX VetLab* Station only: A message giving you the option to print instructions on uploading data displays. Click Yes to open the printable message or No to continue. Click Finish. A message states that activation is complete and that data upload will continue. Close the message window.

After you activate VetConnect PLUS from within the Cornerstone* software, activate VetConnect PLUS from your IDEXX VetLab* Station (if applicable).</td></tr>
</table>


</td></tr>
</table>

Chapter Summary

You learned these important concepts in this chapter:

- **Default and Security Settings Guide Overview**—Gain knowledge of the Default and Security Settings Guide.
- **Recommended Security Settings for Electronic Medical Records**—Learn key security settings for electronic medical records.
- **Default Settings for Electronic Medical Records**—Successfully access defaults for electronic medical records and the Electronic Whiteboard window.

Appendix

IDEXX Cornerstone Chartless Setup Checklist

Client/Patient Information Recommendations

- **User Defined Prompts:** Consider creating user-defined prompts to create fields for information that does not already exist in the client or patient record. User-defined prompts can also be set as alerts.
    - Client Prompts: Preferred Doctor, Client Alert
    - Patient Prompts: Medical Condition, Patient Alert, Temperament, Special Diet, Vaccine Reactor, Allergic To

Medical History Recommendations

- **List Top 10 Reasons for Visit:** Create a list of your top ten reasons for visit. Use this list to ensure that all Cornerstone features are setup to support your protocols for the most common visits.
- **Review/Modify Reasons for Visit:** Review reasons for visit. Create reasons for visit for the top 10 reasons for visit if not already listed. Attach alerts to remind staff of information they should collect from or provide to the client. Documents can also be attached to print at check-in or checkout. (**Controls > Reasons for Visit**)
- **Create Smart Groups:** Create smart groups for your top 10 reasons for visit. Smart groups will establish your protocol and ensure charges are not missed. Pick lists may also be used in smart groups. (**Lists > Invoice Item**)
- **Create Document Templates:** Create medical notes and documents (correspondence or print only) for each reason for visit. (**Lists > Documents > Templates**)

  Medical note templates will standardize the information recorded for each visit in the patient's file. Ensure templates include fields for SOAP or HEAP notations and links to enter vital signs, problems, and diagnoses.
  Documents can be created for consent forms, discharge instructions, and client education, which can be electronically signed and saved to the patient's file.

- **Review/Modify Problems:** Review/modify the problem list. This will ensure the majority of common problems will be on the list to be added to the patient's file as needed. By reviewing now, it will eliminate time entering new problems during exam time. (**Controls > Problems > Problem List**)
- **Review/Modify Diagnoses:** Review/modify the diagnostic code list. This will ensure the majority of common diagnoses will be on the list to be added to the patient's file as needed. By reviewing now, it will eliminate time entering new diagnoses during exam time. (**Lists > Diagnostic Codes**)
- **Review/Modify Callback Reminders:** Review/modify callback reminders attached to invoice items for each reason for visit to ensure callbacks are performed and documented in the patient's file. (**Lists > Invoice Item**)
- **Review/Modify and Attach Departing Instructions:** Review/modify the departing instructions and attach to invoice items to ensure consistent information is provided to clients regarding service and inventory items where appropriate. (**Lists > Departing Instructions**)
- **Review/Modify and Attach Prescription Instructions:** Review/modify prescription instructions and attach to invoice items where appropriate. This will create efficiency when creating prescription labels for medications that have standard dosing instruction. (**Lists > Prescription Instructions**)
- **Review Diagnostic Integration Options:** IDEXX SmartLink* technology can advance the standard of medical care in your practice. It will help you provide better medicine and increase efficiency which lead to better business and increased client loyalty. Lab results and digital radiography can be directly downloaded to the patient's file. Contact your IDEXX Computer Systems Representative for more information on integration options for your practice.
- **Create Compliance Protocols:** Create compliance protocols for your top reasons for visit to measure compliance rates and review missed revenue-generating opportunities. Use the compliance results to determine opportunities for staff education. (**Reports > Compliance Assessment Tool > Protocol Setup Wizard**)

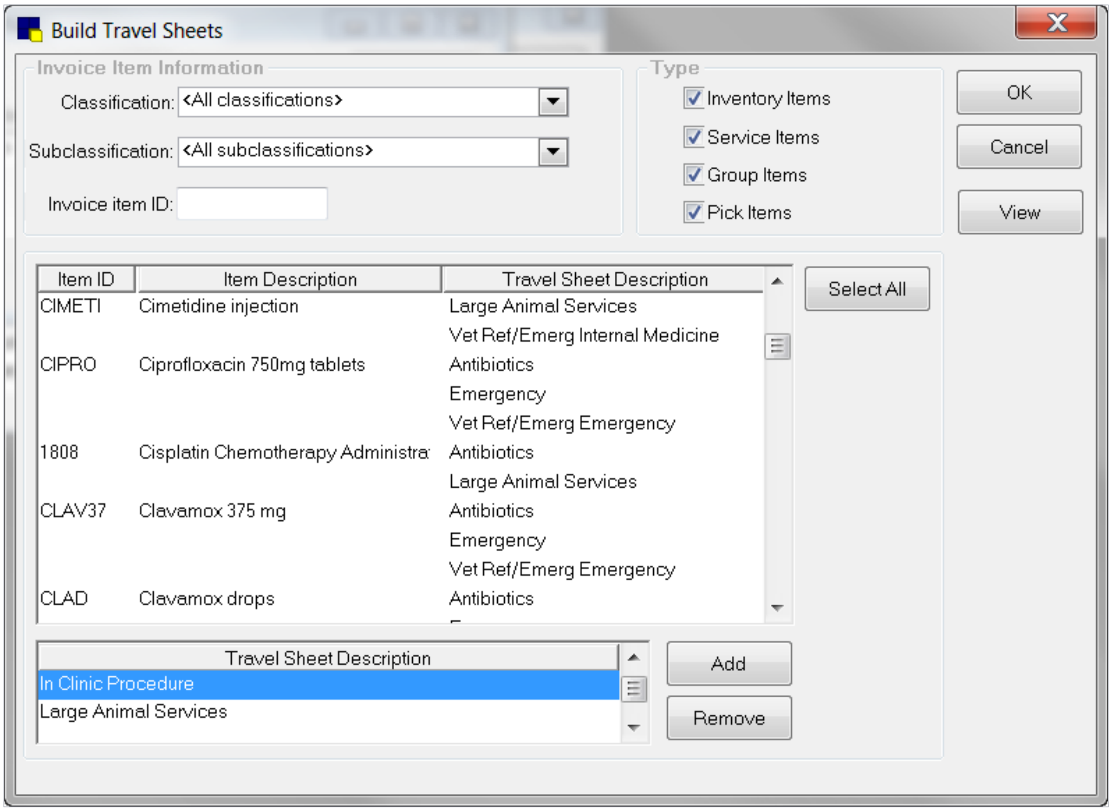
Travel Sheets

Create custom travel sheets of frequently used products and services used in your practice. You can use the travel sheet on your computer or print copies.

When you install your software, Cornerstone automatically creates a Sample Travel Sheet with the top 150 invoice items from the last 12 months to help you get started. You cannot make changes to the Sample Travel Sheet; however, you can save the travel sheet with a different name and make changes to the new travel sheet.

To add or edit a travel sheet:

1. On the **Lists** menu, select **Travel Sheets**.
2. Click **New** to add a new travel sheet or double-click an existing travel sheet to update it. The Travel Sheet Setup window opens.
3. In the **Enter description for travel sheet** box, type a description.
4. Click **Setup** to build your travel sheet. The Build Travel Sheets window opens.



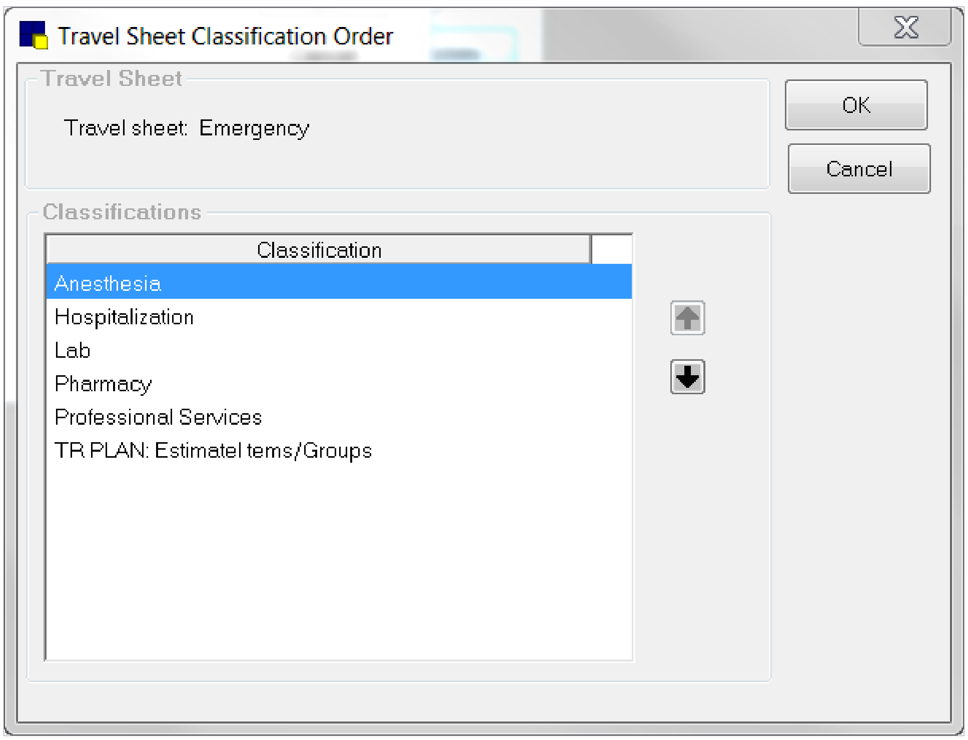
5. In the **Invoice Item Information** area and **Type** area, use the drop-down lists and check boxes to filter the item IDs list for quick selection from a narrowed list of items.
6. In the **Item ID** list, select the items to add to the travel sheet(s).
   - To select all item IDs in the list, click **Select All**.
   - To select more than one item, press and hold the CTRL key while you click to select each item.
   - To select a range of consecutive items, click the first item and then press and hold the SHIFT key while you click the last item in the range.
7. In the **Travel Sheet Description** list, select the travel sheets to which you want to add the selected products and services and click **Add**.
   - To select more than one travel sheet, press and hold the CTRL key while you click to select each sheet.
   - To select a range of consecutive travel sheets, click the first sheet and then press and hold the SHIFT key while you click the last sheet in the range.

8. Repeat steps 5–7 until you have added all items.
9. To remove an item from a travel sheet, select the item in the **Item ID** list, select the applicable travel sheet or sheets in the **Travel Sheet Description** list, and click **Remove**.
10. To see a list of all items selected for an individual travel sheet, click **View**. On the View Travel Sheet window, select a travel sheet and scroll through the list to view the items. Click **Close** when finished.
11. When finished building your travel sheet, click **OK** two times, and then click **Close**.

To arrange the order of the classifications on your travel sheet:

You cannot change the order of the items on your travel sheet, but you can change the order of the classifications.

1. On the **Lists** menu, select **Travel Sheets**.
2. Select the travel sheet to change and click **Update**.
3. Click **Order**. The Travel Sheet Classification Order window opens.



4. Select a classification and then use the up and down arrow buttons to move the classification into a different order on your travel sheet.
5. Continue to move classifications using the arrow buttons until they are in the order you want.
6. Click **OK** two times and then click **Close**.

Referral Management Default Settings

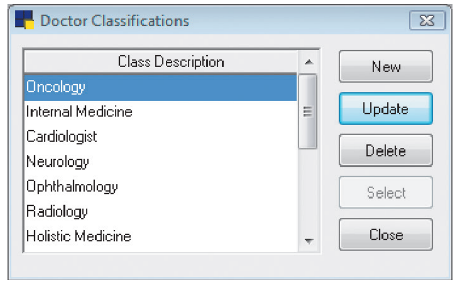
<table>
<tr><th>Menu Access</th><th>Description</th></tr>
<tr><td>Lists > Referrals > Classification</td><td>

Doctor Classifications window

Used to classify the type of hospital that referred the patient.

Used in the following manner throughout the IDEXX Cornerstone* Practice Management System:

- When setting up the referring doctors, select from this classification list



</td></tr>
<tr><td>Lists > Referrals > Doctors</td><td>

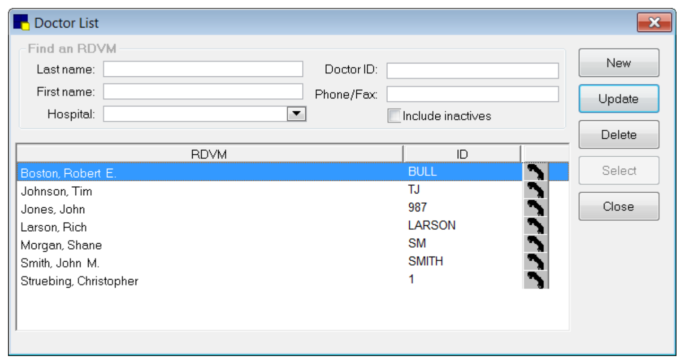
Doctor List window

Used to record the doctor who referred the patient. Doctors must be associated with hospitals.

Click the phone icon to open the RDVM Phone Information window, where you can access all personal and hospital-affiliated phone/fax numbers for the RDVM. The primary contact number for both personal and hospital numbers is indicated.

Used in the following manner throughout Cornerstone:

- When setting up the referring doctors, select from this classification list
- Referral Doctor Master Report



</td></tr>
<tr><td>Lists > Referrals > Hospitals</td><td>

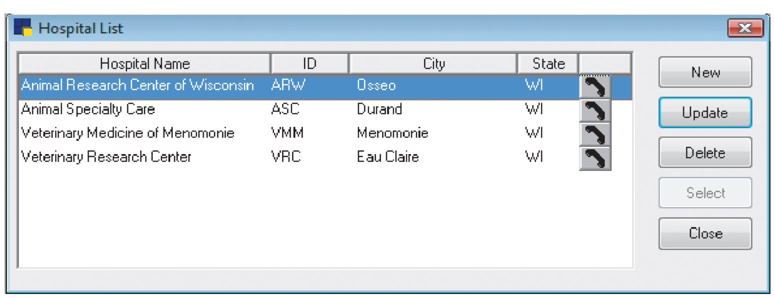
Hospital List window

Used to record the hospital from which the patient was referred.

Click the phone icon to open the Hospital Phone Information window.

Used in the following manner throughout Cornerstone:

- When setting up the referring doctors, select from this hospital list
- Referral Hospital Master Report



</td></tr>
</table>

Use the following chart to help review your current chartless feature setup to determine where there are gaps.

Medical Protocol	Consistent Use of Feature with Description			
	Example: Preventive Care Exam			
Patient Alerts	Yes			
Compliance Alerts	No			
Reason for Visit	Yes			
Medical Note Templates	No			
SOAP/HEAP Notations	No			
Vital Signs	No			
Problems/Diagnosis	No			
Report Card	Yes			
Smart Group	No			
Documents	No			
Reminders/Call Backs	Yes			
Departing Instructions	Yes			
Prescription Instructions	N/A			
Diagnostic Results Laboratory Radiographs	 Yes No			
Compliance Protocol	No			

Electronic Whiteboard Setup and Usage Quick Reference Guide

Electronic Whiteboard Setup

The setup portion of this document provides best practice setup tips that help you:

- Customize Alerts
- Customize Areas
- Add New Categories
- Add New Frequencies
- Add New Patient Hospital Statuses
- Customize Wards/Locations
- Create Secondary Reasons for Visit
- Create Electronic Whiteboard Invoice Items

Customize Alerts

Use Electronic Whiteboard alerts to ensure your staff is aware of important information regarding your patients. Patient prompts and patient classifications can be set as Whiteboard alerts. You can also create or manually add Whiteboard alerts on the fly.

- [ ] Review patient user-defined prompts and set appropriate prompts as alerts. Prompt color can be also be modified and will show on the Whiteboard.
- [ ] Review patient classifications and set appropriate classifications as alerts.
- [ ] Create Whiteboard alerts.

  Examples:

  - [ ] DNR
  - [ ] NPO
  - [ ] Isolation Protocol
  - [ ] Nurse's Name

Customize Areas

Areas can be used as a secondary function of wards/locations as below. The Electronic Whiteboard can be filtered by area. An area can be assigned to each line item on the Patient Orders window (optional).

- [ ] Use as service/treatment types to quickly view the Whiteboard for specific task lists.

  Examples:

  - [ ] Labs
  - [ ] Rads
  - [ ] Exams

- [ ] Use as staff responsibility list to quickly view tasks by staff:

  Examples:

  - [ ] Doctor
  - [ ] Technician

☐ Use as a location or department in hospital.

Examples:

☐ Treatment ☐ Isolation

☐ Boarding

Add New Categories

The Electronic Whiteboard comes with categories already set up. Common categories we have seen added are:

☐ Bathing
☐ Grooming
☐ Fluids

Add New Frequencies

The Electronic Whiteboard comes with frequencies already set up. Frequencies can be set to recur every day or every x number of days. After working with our clients, we've discovered there are some frequencies that could be added to enhance the functionality:

Frequency	Example Treatment
☐ SID PM	Medications, feeding, etc.
☐ Every 2 hours (even)	Diagnostic testing to be completed starting on even hours
☐ Every 2 hours (odd)	Diagnostic testing to be completed starting on odd hours
☐ Hourly	Monitoring critical patient and able to receive overdue notices if a treatment is missed.
☐ Every 2 days	Medication every other day

It has also been useful to include the times in the frequency description (e.g., SID 8a, BID 7a, 5p)

Add New Patient Hospital Statuses

To alert staff of the status of hospitalized patients, consider creating new patient hospital statuses to meet your needs. The patient hospital status can be updated throughout the patient's stay in your practice.

Additional statuses will be treated as "ready to go home" if the following keywords are included in the description: home, ready, discharge, release, or pick.

Examples:

☐ In Surgery or Under Anesthesia ☐ In Recovery or Anesthetic Recovery
☐ Patient Care Level for Emergency Cases ☐ Doctor to Discharge
☐ Boarding ☐ Needs Discharge Appointment
☐ Boarding/Meds ☐ Discharge Appointment Made

Customize Wards/Locations

Wards/locations are used to notify staff where the patient is located in your practice, to filter the main Whiteboard view and to filter Whiteboard reports. Wards/locations can be updated throughout the patient's stay if necessary. There are two ways wards are generally used.

- ☐ **Specific Areas of Practice**—For practices with more than one treatment area or who need to know exactly at which location the patient is staying, specific wards/locations can be created.

  Examples:

  - ☐ ICU
  - ☐ Isolation
  - ☐ Treatment
  - ☐ Boarding

- ☐ **Departments**—General wards are created when practices do not want to specify areas (ICU, isolation, treatment, etc.) of the practice where the patient will stay. These practices want to use the wards/locations to determine if the patient is a hospitalized or boarding patient.

  Examples:

  - ☐ Boarding
  - ☐ Hospital

Create Secondary Reasons for Visit

To avoid staff having to select from a long list of secondary reasons, you may want to set up the predefined list with only the most common secondary reasons and instruct staff to type other secondary reasons as needed.

Examples:

- ☐ Hit by Car
- ☐ Barium Series
- ☐ TPLO
- ☐ Glucose Curve

Create Electronic Whiteboard Invoice Items

- ☐ Create Electronic Whiteboard invoice item classification.
- ☐ Create Electronic Whiteboard invoice items. (Refer to your current paper treatment sheet.)

  Examples:

  - ☐ Walk
  - ☐ Check for Vomiting and Diarrhea
  - ☐ Feed (Hospitalized Patient)
  - ☐ Take Radiograph
  - ☐ Water
  - ☐ Check Incision
  - ☐ TPR Monitoring
  - ☐ Call Owner—Status Update
  - ☐ Monitor Appetite and Drinking
  - ☐ Blood Draw
  - ☐ Monitor Fluids/Check Catheter
  - ☐ Remove Catheter
  - ☐ Check Bandage
  - ☐ Administer Medication

- ☐ Assign pricing, if applicable; there does not need to be a price associated with these items unless they are billable.

  Nonbillable treatments show on the Whiteboard and not on the invoice.

- ☐ Set patient order defaults for Electronic Whiteboard invoice items.

  Patient order defaults can be set by modifying a specific item through **Lists > Invoice Item > Whiteboard** tab or multiple items through **Tools > Invoice Item Setup**.

☐ Create Whiteboard travel sheet, if applicable.

☐ Create Whiteboard smart groups, if applicable.

Examples:

☐ Admit Patient Orders ☐ Inpatient Care

Electronic Whiteboard Usage

The usage portion of this document provides best practice usage tips for:

- Diagnostic Test Requests (IDEXX SmartLink* In-house Laboratory and IDEXX SmartLink* Digital Imaging)
- Patient Orders Tips—Blue Line
- Prescriptions
- Items with Special Pricing
- Patient Order Treatment Schedule

Diagnostic Test Requests

Decisions will need to be made for handling diagnostic requests with the use of the Whiteboard. Ask yourself the following question:

Do I want to see if the diagnostic test has been completed on the Whiteboard?

Prerequisite: Invoice items must have appropriate diagnostic request special actions attached.

Yes	1. Finalize estimates and select **Continue** on the Special Action window. 2. Enter patient orders. 3. Transfer diagnostic items(s) from the Whiteboard Patient Visit List (PVL) to the patient orders. 4. Complete patient treatments. 5. Click **Process** on the Special Action window to send the diagnostic request to the IDEXX VetLab* Station, Imaging Dashboard window, or to generate the IDEXX LabREXX* test request form and show the diagnostic request as completed. **- OR -** 1. Finalize estimates and click **Process** on the Special Action window to send the diagnostic request to the IDEXX VetLab Station, Imaging Dashboard, or to generate the IDEXX LabREXX test request form. 2. Enter nonbillable patient orders for diagnostic request. 3. Use the blue line to note which tests will be run, how much blood to draw, radiograph position, etc. 4. Complete patient treatments.
No	1. Finalize estimates and click **Process** on the Special Action window to send the diagnostic request to the IDEXX VetLab Station, Imaging Dashboard, or to generate the IDEXX LabREXX test request form. 2. The charge will be found on the Patient Visit List and will not need to be transferred to the Whiteboard.

Patient Orders Tips—Blue Line

Use the blue lines to communicate treatment details to your staff that are not included in the invoice item description. The information entered on the Patient Orders blue line will be saved to the patient's electronic medical record when your staff completes the treatment.

Invoice Item	Example Blue Line Note
☐ Fluid Administration	Fluid Rate: 60 mL/hr for 2 hours
☐ Eye or Ear Medications (e.g., Ointment)	Right eye, left eye, both eyes
☐ Boarding—Admin Meds	Amoxicillin 100 mg; 2 tabs BID
☐ Boarding—Special Diet	Owner brought treats—treat BID
☐ Radiograph Initial View	VD, Lat Abdomen, Qty: 2

Prescriptions

There are two ways to handle items with dispensing fees on the Whiteboard. Ask yourself these questions:

Do you dose from a prescribed bottle?

1. Create a prescription label for the medication from the Patient Clipboard* or Patient Visit List **OR** enter the medication in the Patient Orders window to be completed one time. This will bill the medication and create the prescription label (if the prescription label special action is being used) when your staff completes the treatment.
2. Attach the prescription label special action on the invoice item's **Special Actions** tab.
3. Enter an order for a nonbillable service to give the medication with a note on the blue line to denote how much medication. Set the frequency to how often the medication should be given.

Do you dose medication as needed from a common vial?

Enter the medication in the Patient Orders window to be administered with the appropriate frequency. Dispensing items should also be created and attached to the appropriate inventory items to ensure your full dispensing fee will not be charged each time you administer the medication. Dispensing items allow the staff a choice on the dispensing fee that will be added to the medication price.

Dispensing Item Examples:

☐ Meds To Go Home ☐ Meds Admin In Hospital

Dispensing items are created in the invoice item list.

Items with Special Pricing

When transferred from PVL to Whiteboard, items with special pricing will revert to original price upon completion from Whiteboard. This includes:

- ☐ Estimate Markup %
- ☐ Manually changed prices on estimate/PVL
- ☐ Smart groups with markdown/markup

Suggestions until future release:

- ☐ Consider removing estimate markup % from invoice items
- ☐ Leave "special price" items on PVL and add as nonbillable items on the Patient Orders window

- ☐ Groups must be moved and completed as an entity for special pricing to remain intact (including group header line)
- ☐ Alternately, adjust groups to not use markdown/markup feature
- ☐ Always check/update final PVL pricing before posting to invoice (compare to finalized estimate)

Patient Order Treatment Schedule

Vital Signs

- ☐ Used to bring up the Vital Signs window when item completed on Patient Treatments window
- ☐ Use blue line to detail specific vitals to be recorded

PRN

- ☐ Used in addition to frequency
- ☐ For treatments to be performed only "as needed"
- ☐ Treatments will not list as overdue

Dose Now

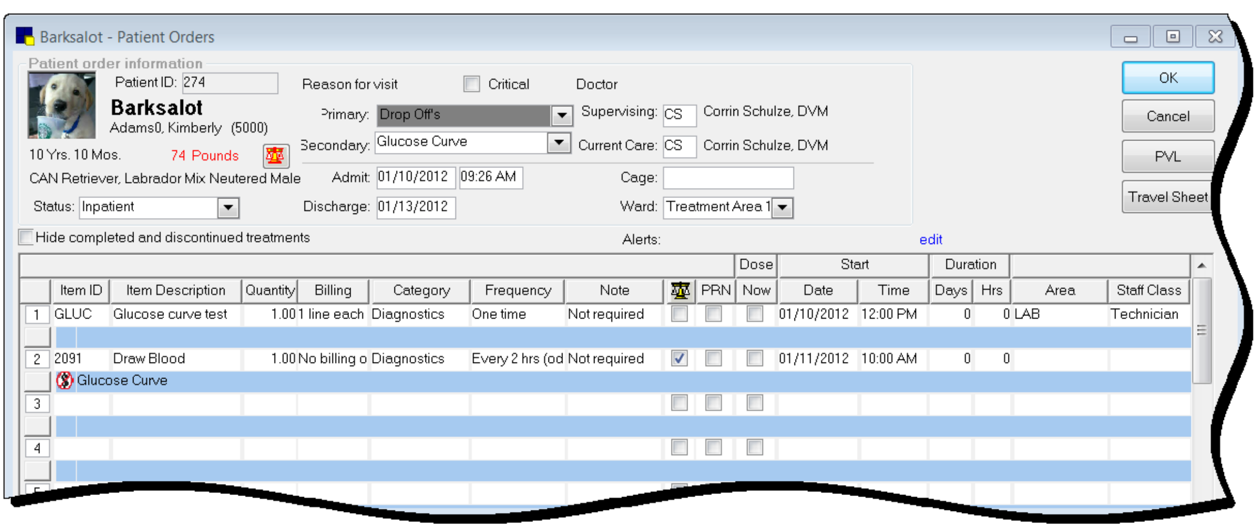
- ☐ Used in addition to frequency
- ☐ For treatments to be performed now, then follow regularly scheduled frequency

Start Date/Times

- ☐ Used in addition to frequency
- ☐ Can set specific dates/start times for each treatment in hour and minute increments

Duration

- ☐ Used in addition to frequency
- ☐ Can set specific duration in days/hours for treatments
- ☐ Often used in conjunction with the "continuous" frequency



Medical Notes and Correspondence Bookmark List

File descriptions and bookmarks are listed below.

Bar Codes

BC Client First Name	BC Client Last Name	BC Staff Full Name
BC Client Full Name	BC Patient ID	BC Staff ID
BC Client ID	BC Patient Name	BC Staff Last Name
	BC Staff First Name	

Boarding

Arrival Date	Cage Number	Departure Time
Arrival Time	Cage Type	Patient Information
Boarding Status	Departure Date	

Choice

our/your	us/you	we/you

Client

Address 1	Last Name	Referred Address 1
Address 2	Last Payment Amount	Referred Address 2
All Phones	Last Payment Date	Referred By Name
City	LY Sales—Inventory	Referred City
Classification	LY Sales—Services	Referred Postal Code
Client Signature	LY Visits	Referred State
Credit Code	Middle Initial	Secondary Name
Current A/R	Ninety Days A/R	Sixty Days A/R
Date Client Entered	Note	State
Email Address	Outstanding Balance	Status
Finance Charges A/R	Overdue Balance	Thirty Days A/R
First Name	Phone Description	Title
Full Name	Phone Extension	YTD Sales—Inventory
ID	Phone Number	YTD Sales—Services
Last Month A/R	Postal Code	YTD Visits

Imaging

Image	Patient Picture

Invoice Items

List

Lab

Lab Results

Medical History

Abnormal Exam Observ. Only	All Exam Observations	Patient Diagnosis
	Departing Instructions	

Medical Notes

All or any specific medical notes	Header and Footer
	Header and Footer w/fonts

Merge

Invoice Item BC	Invoice Item Desc (description)	Invoice Item ID

Miscellaneous

Current Date	Current Time

Patient

Age	Date Patient Entered	Rabies Tag Date
Birth Date	Deceased Date	Rabies Tag Number
Breed	Manner Of Injection	Registration Number
Check In Date (Last)	Markings	Sex
Check In Time (Last)	Microchip ID	Species
Check Out Date (Last)	Name	Vaccine Amount
Check Out Time (Last)	Number of Years	Vaccine Expiration
Color	Patient Classification	Vaccine Lot Number
Current Weight	Patient ID	Vaccine Name
Current Weight Unit	Patient Note	Vaccine Producer
Current Weight Unit Date	Patient Status	Vaccine Type
Date Current Weight	Rabies Expiration Date	

Practice

All Phones	Clinic Address 2	Clinic Phone
Clinic Address 1	Clinic City	Clinic Postal Code
	Clinic Name	Clinic State
	Clinic Name 2	

Prescription Inst (instructions)

List

Question

Displays a window for a question to be entered.

Referral Doctor

All Phones
Ref. Doctor Address 1
Ref. Doctor Address 2
Ref. Doctor City
Ref. Doctor Email
Ref. Doctor Fax
Ref. Doctor First Name
Ref. Doctor Full Name
Ref. Doctor Last Name
Ref. Doctor License
Ref. Doctor Note
Ref. Doctor Phone Desc. (description)
Ref. Doctor Phone Extension
Ref. Doctor Phone Number
Ref. Doctor Postal Code
Ref. Doctor State
Ref. Doctor Title

Referral Hospital

All Phones
Ref. Hospital Address 1
Ref. Hospital Address 2
Ref. Hospital City
Ref. Hospital Email
Ref. Hospital Fax
Ref. Hospital Name
Ref. Hospital Note
Ref. Hospital Phone Desc. (description)
Ref. Hospital Phone Extension
Ref. Hospital Phone Number
Ref. Hospital Postal Code
Ref. Hospital State

Reminder Info

Varies by practice

Staff

All Phones
Signature
Signature w/Pwd. (password
Staff Address 1
Staff Address 2
Staff City
Staff Classification
Staff Extension
Staff First Name
Staff Full Name
Staff ID
Staff Last Name
Staff License Number
Staff Middle Initial
Staff Note
Staff Phone Description
Staff Phone Number
Staff Postal Code
Staff State
Staff Status
Staff Title

User Def Client

Varies by practice (depending on what you set up as user-defined prompts (**Controls > User Defined Prompts > Client** tab)

User Def Patient

Varies by practice (depending on what you set up as user defined prompts (**Controls > User Defined Prompts > Patient** tab)

Vaccinations

Varies by practice

Project Champion: ____________________ Project Lead: _____________________ Core Team: __________________________

Goal/ Task	Goal/ Task ID	Goal/Task	Start Date	End Date	Status *(Not Started, In Progress, Complete)*	Responsibility/Notes
Goal		Increase our practice's __________________ ______________________________________ *(enter goal)* from _____%/$_____ amount from _______ *(date)* to _____ %/$_____ amount by ______ *(date)*.				
T A S K	**1.1**	**Assess and Commit:**				
	1.1.1					
	1.1.2					
	1.1.3					
	1.2	**Train and Change:** *Once gaps are identified, training is used to bring staff and management to new level of proficiency.*				
	1.2.1					
	1.2.2					
	1.2.3					
	1.3	**Measure and Manage:** *Setting goals that can be quantified has a powerful influence on the success of any transition.*				
	1.3.1					
	1.3.2					
	1.3.3					

Project Champion: Dr. Jones Project Lead: Dr. Jones Core Team: Dr. Jones, Dr. Carson, Sue Bee

Goal/ Task	Goal/ Task ID	Goal/Task	Start Date	End Date	Status *(Not Started, In Progress, Complete)*	Responsibility/Notes
Goal		Implement usage of electronic medical records, create practice standards of care.				
TASK	**1.1**	**Assess and Commit:**				
	1.1.1	Outline protocols and visit work flows—include list of invoice items for each protocol and work flow.				
	1.1.2	Outline intended use of Cornerstone electronic medical records—include smart groups and medical note templates.				
	1.1.3	Set up Cornerstone electronic medical record features.				
	1.2	**Train and Change:** *Once gaps are identified, training is used to bring staff and management to new level of proficiency.*				
	1.2.1	Core Team—Test electronic medical records.				
	1.2.2	Core Team—Modify setup of electronic medical record features, modify protocols, modify work flows.				
	1.2.3	Core Team—Retest electronic medical records.				
	1.2.4	Provide staff training for use of electronic medical records.				

Goal/ Task	Goal/ Task ID	Goal/Task	Start Date	End Date	Status *(Not Started, In Progress, Complete)*	Responsibility/Notes
TASK	**1.3**	**Measure and Manage:** *Setting goals that can be quantified has a powerful influence on the success of any transition.*				
	1.3.1	Measure patient compliance documented in electronic medical records.				
	1.3.2	Create plan for improving patient compliance.				
	1.3.3	Create plan for ongoing measures and improvements.				

Benefits: Improve documentation of patient medical records, increase use of electronic functionality, and reduce use of patient files, hard copies, and paper, as well as improve patient compliance through standardized protocols and visit work flows.

Skill Assessment and Evaluation

Electronic Medical Records and Whiteboard Setup Skill Assessment

Practice Name: ______________________________

Your Name: ______________________________

Completion Date: ______________________________

Instructions: After completing your training, please read each of the following skill assessment statements and evaluate your ability to perform each task. Mark only one X for each skill statement.

	Can Perform	Can Perform but NOT Using	Cannot Perform	Not Applicable
1. I can locate the Cornerstone Workflow.				
2. I can locate the technology items that would be useful for a practice with electronic medical records.				
3. I can locate the Security Settings document.				
4. I can access and set Cornerstone defaults.				
5. I can access and set default settings from the Controls menu.				
6. I can create and update a dispensing item.				
7. I can create, update and explain the use of a pick item.				
8. I can create, update and explain the use of a smart group.				
9. I can attach special actions to invoice items.				
10. I can attach reminders to generate and satisfy to invoice items.				
11. I can set up vaccine tag information for invoice items.				
12. I can set up treatment categories and frequencies.				
13. I can set up wards/locations and treatment areas.				
14. I can set up vital signs.				
15. I can create a document template.				
16. I can insert an invoice item into a document template.				
17. I can insert a table into a document template.				
18. I can insert a document template to autofinalize in a specific number of days.				
19. I can edit and/or delete a default header and/or footer in a document template.				
20. I can set properties for a document template.				
21. I can mark a document template as inactive.				

Results of the Skill Assessment

_____ Can Perform

_____ Can Perform but Not Using

_____ Cannot Perform

_____ Not Applicable

Please return this skill assessment using one of the following methods:

Return this information to:
Cornerstone Education Department at CornerstoneCoach@idexx.com.

Mail this information to:
IDEXX Laboratories
Attn: Cornerstone Education Department/Gina Toman
One IDEXX Drive
Westbrook, Maine 04092

IDEXX Cornerstone* Practice Management System

Electronic Medical Records and Whiteboard Setup Evaluation

We value your opinion! Tell us what you think about the course.

Practice: ______________________________ Date: __________________

Trainer: ______________________________

Feedback received from you regarding the training is vital to our continued improvement.

Course Description

During this course, key project leaders who are moving their practice towards becoming a chartless practice or setting up medical note templates or Whiteboard for the first time, will complete the setup of their electronic medical records and Whiteboard in their real data files. The content includes:

- Patient Visit Overview and Technology Overview
- Medical Record Strategy
- Reason for Visit Alerts and Documents
- User-defined Prompts and Classifications
- Prescription Instructions, Departing Instructions, Problems, and Diagnosis
- Invoice Item Setup
- Vital Signs Setup
- Electronic Whiteboard Setup
- Medical Notes and Correspondence
- Electronic Medical Record Default Settings

1. **How likely would you be to recommend an IDEXX Cornerstone course to a friend or colleague?**

1 Not Likely... ....Likely 10

1	2	3	4	5	6	7	8	9	10
O	O	O	O	O	O	O	O	O	O

2. **For us to better understand the opinions of our participants, please explain why you selected the rating above?**

3. **The prerequisites for this course are:**

- The most current version of Cornerstone installed at practice.
- Basic Cornerstone navigation.
- Access to set up Cornerstone features, which means security for electronic medical record setup.
- Basic Cornerstone setup knowledge: invoice items, departing instructions, and prescription instructions.

Indicate which participants were ready for, and met the prerequisites for, this course.
Please select all that apply.

O Our practice O All other practices O Some other practices

4. How was the length of the course?

O Too short O Too long O Just right

Additional Comments:

5. Referring to the items listed below, did we meet your expectations:

	No 1	2	3	4	5	6	7	8	9	Yes 10	N/A
The course content matched the course description.	O	O	O	O	O	O	O	O	O	O	O
The course materials were professional looking.	O	O	O	O	O	O	O	O	O	O	O
The course materials provided contained valuable content.	O	O	O	O	O	O	O	O	O	O	O
The trainer arrived well prepared and used appropriate examples.	O	O	O	O	O	O	O	O	O	O	O
The trainer used effective communication skills.	O	O	O	O	O	O	O	O	O	O	O
The trainer answered all of my questions effectively.	O	O	O	O	O	O	O	O	O	O	O
As a result of this course we can expand our use of Cornerstone's features.	O	O	O	O	O	O	O	O	O	O	O
This course provided a good value for the cost.	O	O	O	O	O	O	O	O	O	O	O

Additional Comments:

6. Did you follow along with the participant workbook during the course presentation?

- O **Yes**—I followed the participant workbook the majority of the time.
- O **No**—I didn't use the participant workbook.
- O **Sometimes**—I used the participant workbook some, but not most, of the time.

If **No** or **Sometimes**, why not?

7. What was the most valuable aspect of this course?

8. What suggestions do you have for future revisions of this course?

9. Using the roles listed, count and record how many participants (from your practice) attended some, or all, of this course. *If someone holds more than one of these roles, record their primary role only*.

Primary Roles	Number of participants with this primary role that attended this course
Veterinarian	
Technician or Nurse	
Reception or Client Services	
Office, Practice or Business Manager	
Practice Owner	
Other *(List role and record number)*	
Other *(List role and record number)*	

Thank you! We appreciate your feedback.

Testimonial Permission:
(Please check the box below)

☐ Please have an IDEXX Computer Systems Representative contact me to discuss featuring my comments in promotional materials.

Please Print:

Your Name: ______________________

Practice Name: ______________________

Practice City, State: ______________________

Practice Telephone #: ______________________

Reminder: Please return this Evaluation using one of the following methods:

Return this information to:
Cornerstone Education Department at CornerstoneCoach@idexx.com.

Mail this information to:
IDEXX Laboratories
Attn: Cornerstone Education Department/Gina Toman
One IDEXX Drive
Westbrook, Maine 04092

IDEXX LABORATORIES