New employee onboarding guide

Use this guide to complete the steps for setting up a new employee in Cornerstone Software and as a checklist for the training/tasks they'll need to complete. In this guide you will find:

- Tasks for you to complete to set up the new employee.
- Self-paced training courses to assign to the new employee.
- Tasks for the new employee to practice.

Set up the employee in Cornerstone Software

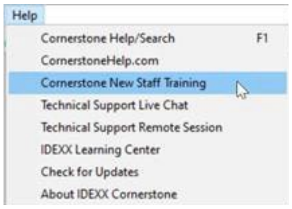
Employee:

Cornerstone Software management tasks	Complete
Create staff (Lists > Staff)	Y ☐ N/A ☐
Assign security permission (File > Security Setup)	Y ☐ N/A ☐
Create staff password (File > Security Setup)	Y ☐ N/A ☐
Create cashier ID (Lists > Cashier)	Y ☐ N/A ☐
Create cashier password (Lists > Cashier)	Y ☐ N/A ☐
Ensure the employee has a MyIDEXX account associated with your practice. They will use their MyIDEXX credentials to access self-paced training courses on the IDEXX Learning Center. To create an account have the employee: • Go to the IDEXX Learning Center and select **Sign In** from the top right corner. • Select **Register now.** • Complete the required fields to finish setting up your login. • Select **Create account.** For more information on setting up a MyIDEXX account, go to https://www.idexx.com/en/veterinary/support/myidexx/ If the employee already has a MyIDEXX account, have them adjust their business affiliation to your practice. For more information on this and on the IDEXX Learning Center, go to: https://learn.idexx.com/pages/16/help-and-support	Y ☐ N/A ☐
Assign applicable courses for the employee to complete.	Y ☐ N/A ☐
Provide access to your live Cornerstone database. This will ensure the employee can complete the Core Workflow training and explore Cornerstone Software at the same time.	Y ☐ N/A ☐

Assign self-paced eLearning courses

The IDEXX Learning Center has several courses available for learning how to use Cornerstone Software. We recommend all new employees start with the eLearning course **Getting Started with Cornerstone Core Workflow**. This course is designed to introduce new employees to Cornerstone and walks through using Cornerstone following a patient visit workflow.

In addition to the direct links to the courses below, these courses can be accessed via the Help menu in Cornerstone. Click **Cornerstone New Staff Training** for Getting Started with Cornerstone Core Workflow or click **IDEXX Learning Center** to search for the other courses.



Note: You need to be logged into the IDEXX Learning Center with your credentials to find the courses.

General training: All new employees	Assigned
Course Name: Getting Started with Cornerstone Core Workflow Topics included: • Log in to and navigate Cornerstone. • Search for and create clients and patients. • Navigate and use the features of the Patient Clipboard*. • Navigate and use the Daily Planner to manage Daily activities. • Create and check in appointments. • Use medical notes and correspondence documents for a patient. • Create, sign, and finalize an estimate. • Add items to the Patient Visit List (PVL), decline items to history, transfer items to an invoice, and use other PVL features. • Add items to and post an invoice and take payment on the invoice. • Balance the drawer for end of day using reports, and then process end of day.	Y ☐ N/A ☐

Additional notes/instructions:

Optional training courses: Dependent on employee’s role	Assigned
Course name: Reports Learning Journey Topics included: • How to use report goals to help you find the report you need. • How to search for reports. • Create, filter, and sort reports. • Learn about frequently used reports. • Explore many reports and the real-life situations they can be used for. • Create custom reports using the Client and Patient Report Builder.	Y ☐ N/A ☐
Course name: Inventory & Invoice Item Management I Topics included: • Structuring your items: classes and subclasses. • Types of invoice items. • Setting up service items and inventory items.	Y ☐ N/A ☐
Course name: Inventory & Invoice Item Management II Topics included: • Review of groups, picks, and dispensing items. • What a dispensing item and pick lists are and how to set them up • How to set up group codes and smart groups.	Y ☐ N/A ☐
Course name: Reminder Strategy and Setup Topics Included: • Building a reminder strategy that works for your practice. • Set up invoice items to generate and satisfy reminders on the patient’s record. • The different reminder reports and how to use them.	Y ☐ N/A ☐
Course name: Client Account Management 1 Topics included: • Identify important financial information on a client's account • Generate end of period reports to review financial information • Correct a payment error	Y ☐ N/A ☐
Course name: Client Account Management 2 Topics included: • Making a payment on account • Payment Corrections • Return Invoice Items • Refunding a missed discount or credit balance	Y ☐ N/A ☐
Course name: Laboratory Integration with Cornerstone Topics included: • Lab default settings and linking diagnostic profiles to invoice items • Creating a lab request (IDEXX Reference lab and IDEXX in-house) • Updating a pending lab request and adding tests to a lab order • Review lab results and manual lab result entry • Reconciling results (orphans/not requested) • Updating lab prices	Y ☐ N/A ☐

Additional notes/instructions:

Tasks for employee to complete

After completing the **Getting Started with Cornerstone Core Workflow** course, the employee will be able to complete the list of tasks below. Each of the task lists corresponds with a lesson from the course. Completing these exercises will give them the opportunity to practice using Cornerstone Software.

How to use the task lists:

- Assign any task to the employee that they will need to perform in their role at the practice.
- In the additional note areas, specify any instructions on how they should practice this task. Is there a test account in Cornerstone they should use? Should they perform the task on an actual client/patient record while someone observes?

IMPORTANT: Some of the practice exercises on the subsequent pages are **highlighted in blue.** These exercises will require clean-up if they are performed on a test account within your live database. **If they are not cleaned up they will affect your reporting, patient history, client account, etc.**

Core workflow: Logging in and navigation		
Assigned	Task	Done
☐	Log in to Cornerstone Software.	☐
☐	Practice logging out of Cornerstone Software using the keyboard shortcut.	☐
☐	Open the Help window using the keyboard shortcut and practice using the search window.	☐
☐	Locate and click the Search Clients and Patients icon.	☐
☐	Locate and click the Patient Clipboard icon. Why is this feature important to you? **Answer:**	☐
☐	Locate and click the Daily Planner icon. How can this help you manage your day? **Answer:**	☐
☐	Locate and click the Schedule for Today icon. Identify how/why you might use this feature in your role. **Answer:**	☐
☐	Locate and click the Laboratory Requests and Results icon. Identify how/if you might use this in your role. **Answer:**	☐
☐	Locate the Micro help area. What is currently in the Micro help? **Answer:**	☐
☐	Verify that you are logged in. Where did you find this information? **Answer:**	☐
☐	(Optional) Print the *Cornerstone Basics Quick Reference Guide.*	☐

Additional notes/instructions:

Core workflow: Client and patients		
Assigned	Task	Done
☐	Open a blank Patient Clipboard.	☐
☐	Search for a client and display them on the Patient Clipboard.	☐
☐	Locate the Client Account tab. What was the last amount paid? **Answer:**	☐
☐	Locate the Patient Reminders tab. What reminder is due next for this patient? **Answer:**	☐
☐	Locate where client and patient alerts are displayed. What is one alert the client or patient has? **Answer:**	☐
☐	Review the patient history area and familiarize yourself with the different tabs, including Medical Notes, VetConnect* Plus, and Prescription History. What was the date of the patient's last prescription? **Answer:**	☐
☐	Starting from the Patient Clipboard, search by patient and select a record to view. What is the patient ID? **Answer:**	☐
☐	Practice searching by client and patient using the Search Clients and Patients tool.	☐
☐	Explore the rest of the tabs on the client and patient areas on the Patient Clipboard. What are two pieces of information you can find under both? **Answer:**	☐
☐	Right-click on both patient and client areas on the Patient Clipboard to view the available options. What are three things you can do from the right-click menu? **Answer:**	☐
☐	Create a new client account for yourself.	☐
☐	Create a new patient called "Training" within your account. Practice entering in reminders, prompts, and notes.	☐
☐	(Optional) Print the *Patient Clipboard Quick Reference Guide.*	☐

Additional notes/instructions:

Core workflow: Exploring the Daily Planner		
Assigned	Task	Done
☐	Change the Staff ID to view information for a different Staff member.	☐
☐	Find and name all the places where you can access the Patient Clipboard from the Daily Planner. **Answer:**	☐
☐	Check in an appointment.	☐
☐	Complete a Call Back.	☐
☐	Find where you can open and review medical notes and correspondence documents.	☐
☐	View items on the Patient Visit List. How can you transfer them to an invoice from the Daily Planner? **Answer:**	☐
☐	(Optional) Print the *Cornerstone Daily Planner Quick Reference Guide.*	☐

Additional notes/instructions:

Core workflow: Front desk		
Assigned	Task	Done
☐	Schedule an appointment for your newly created Training pet.	☐
☐	Hover the pointer over your appointment to review the information displayed.	☐
☐	Move the appointment to another time.	☐
☐	Check in your appointment.	☐
☐	Locate the visual indicator on the schedule view that informs you that an appointment is checked in. What is this indicator? **Answer:**	☐
☐	Press F3 to open your Census List as an alternate way to view patients in the hospital.	☐
☐	(Optional) Print the *Check-in and Census List Quick Reference Guide*.	☐
☐	(Optional) Print the *Appointment Scheduler Quick Reference Guide*.	☐
☐	(Optional) Print the *Reception Quck Reference Guide*.	☐

Additional notes/instructions:

Core workflow: Exam room and treatment area		
Assigned	Task	Done
☐	Start and complete a medical note.	☐
☐	Start and complete a quick text medical note.	☐
☐	Start and complete a correspondence document.	☐
☐	Create and finalize an estimate.	☐
☐	Prescribe and refill a medication.	☐
☐	Correct and reprint a prescription label.	☐
☐	Add items to the Patient Visit List.	☐
☐	Type "ready to go" on the Patient Visit List to indicate the patient is ready to be checked out.	☐
☐	Decline an item to history from the Patient Visit List.	☐
☐	(Optional) Print the *Estimates Quick Reference Guide*.	☐
☐	(Optional) Print the *Patient Visit List Quick Reference Guide*.	☐
☐	(Optional) Print the *Medical Team Quick Reference Guide*.	☐

Additional notes/instructions:

Core workflow: Check out and end of day activities		
Assigned	Task	Done
☐	Transfer items from the Patient Visit List to an invoice.	☐
☐	Add items directly to an invoice.	☐
☐	Post an invoice and take payment.	☐
☐	Use reports to balance your drawer prior to running end of day.	☐
☐	Use additional reports to find where payment errors were made prior to running end of day.	☐
☐	Locate where daily reports can be printed after end of day has been processed.	☐
☐	(Optional) Print the *Invoicing Quick Reference Guide*.	☐
☐	(Optional) Print the *End of period activities Quick Reference Guide*.	☐

Additional Resources

- Cornerstone Newsletter Sign-Up
- IDEXX Cornerstone User Webinar Series
- IDEXX Cornerstone Tip Tuesday
- Cornerstone Coach Professional Services Catalog
- IDEXX Cornerstone News & Information

We'd love to know what you think of this resource for onboarding new employees! Please use this link to take a brief four-question survey.

https://www.surveymonkey.com/r/CornerstoneOnboarding