

# IDEXX Cornerstone\*

## Practice Management System

### How to Set Up the Compliance Assessment Tool\* for a Wellness Protocol

#### Prerequisites for effective Compliance Assessment Tool reporting:

##### SET UP ASSESSMENT BASED ON CHECK-IN DATE

The Compliance Assessment Tool\* uses either check-in dates or invoice dates to determine when the patient was last seen in the practice.

Compliance reporting based on check-in dates:

- Is based on when patients were checked into the practice through the Cornerstone\* Practice Management System.
- Reflects all patient visits, even if no invoice was generated during the visit.
- Does not include activities that don't involve checking in, such as over-the-counter sales and prescription refills.
- Is the preferred method for tracking compliance.

To set this up, go to **Controls > Defaults > Practice and Workstation > Check-in** and select the **Use check-in date for compliance** check box.

##### ENSURE PATIENT AGES AND WEIGHTS ARE RECORDED

Because the Compliance Assessment Tool places each patient into a certain weight/age group, patients who are missing weight or birth date from their patient record will not be included in the results.

Use the following reports to review your files for missing birth dates or weights:

- Patients Missing Birth Dates (**Reports > Patient > Animals Without Birthdates**)
- Patients Missing Weights (**Reports > Patient > Animals Without Weight**)

#### Customize protocols for wellness:

1. Go to **Reports > Compliance Assessment Tool > Protocol Setup Wizard**.
2. In the Protocol Setup Wizard—Protocol selection/entry window, select the **Display predefined IDEXX protocols** check box.
3. Select one of the protocols in the protocol group that you want to customize. For example, you could select Canine Adult Wellness Grp1 to customize the whole canine adult wellness group.
4. In the list on the left, select **Select services**.
5. Select the regular compliance search option (“Search for missed opportunities...”) and click **OK**.
6. In the **Tests/Services** list:
  - For any tests that you want that aren't already selected, click the test to select it.
  - For any selected test that you don't want to include, click the test to deselect it.

**Note:** If a message asks whether you want to make this change to all the protocols in this group, click **Yes**. You may see this message on this step or one of the following steps.
7. Click **Add/update tests and services**.
8. For each test or service:
  - a. Double-click it in the **Tests** list.
  - b. In the **Search for descriptions containing** box, type part of the description of the service or inventory item related to this test/service, and do the following:
    - i. Select the item(s) you want on the **Invoice item search results** list. Hold down the CTRL key to select multiple items. Items in red are inactive, but you can still select them for protocols.
    - ii. In the **Invoice items selected** list, select one item as the default item. This default item will serve as the price basis when calculating your opportunity.
    - iii. For each item, in the **Hx Search (months)** column, select the number of months that you want the tool to search back in the patient history to find invoices that demonstrate compliance with the protocol.
  - c. Click **Finish**.

9. If you want to add a new test or service, type a name in the **New Test** box, click **Add**, and follow the instructions in step 8 to assign invoice items to the new test.
10. In the Select services window, click **Next**. The Protocol summary window displays the protocol.
11. Click **Finish**.
12. When a message asks if you would like to generate compliance results:
  - If you would like to generate compliance results immediately, click **Yes** and follow the “Run a compliance assessment report” instructions below.
  - If you would like to generate results at a later time, click **No**.

### Run a compliance assessment report:

1. If you aren't already on the Generate compliance results window, go to **Reports > Compliance Assessment Tool > Generate Compliance Results**.
2. In the **Protocol/Group** list, select each protocol or protocol group to include in the compliance check.
3. In the **Date range** area, enter the date range to include in the results. As described in the prerequisites at the beginning of this document, the date range uses either the check-in date or the invoice date, depending on which you have set up.
4. In the **Patient classification** list, deselect any classifications that you don't want to include, such as Referral Only or Emergency Only.
5. If applicable, in the **Invoice item classification** area, select invoice item classifications to which this search applies.
6. In the **Display in** area, click **Dollars** to display results in dollar amounts or click **Services** to display results by quantity.
7. Click the **Search** button. The results appear in the bottom half of the window.
8. Use the **Next** and **Back** buttons to view the detail sections of the compliance results. You can print or save any section.
9. Click **Finish** to exit.

### Set up compliance alerts:

You can set up your system to display an alert when a patient who needs a recommended service is seen. When the alert displays, you can process it to see which services or tests are missing from the patient record.

1. Go to **Controls > Defaults > Practice and Workstation**.
2. In the navigation pane, click **Alerts** and then click **Compliance Alerts**.
3. In the **Compliance alerts** list, select (or deselect) the protocols for which you want alerts to display. Alerts appear for patients who need a recommended service that is associated with the protocols you select here. The more alerts you select, the longer the compliance check will take.
4. If you want to view the predefined protocols, select the **Display predefined IDEXX protocols** check box.
5. In the **Display compliance alerts** list, select where you want the alerts to display.
6. When you've finished setting up compliance alerts, click **OK**.

### Learn more:

- On the IDEXX Learning Center, view [Setting up Alerts](#), a 5 minute snippet video that walks you through both setting up a protocol and setting up compliance alerts.
- For detailed information, see the [Compliance Assessment Tool Primer Workbook](#).
- To get the most out of the Compliance Assessment Tool, we recommend the [Measuring and Managing Compliance](#) course. For more information, click the link or call your IDEXX Cornerstone Sales Representative at 1-800-283-8386.

