IDEXX **Cornerstone**®

Practice Management System

Cornerstone Practice Explorer User's Guide

Powered by SmartLink™ Technology

IDEXX LABORATORIES

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Using Practice Explorer

Introduction

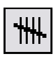
Practice Explorer® is an IDEXX Cornerstone® Practice Management System module that allows you to extract information from your practice’s database. This information can help you identify opportunities for your practice’s growth and also help you effectively communicate with your clients.

How it works

Your Cornerstone practice management software stores all your practice’s information, including client and patient information, medical records and invoice items, in a file called a database. Practice Explorer allows users to select and extract information from the database. You can use the preloaded reports and tallies or you can create your own reports and tallies and run updates to change certain reminder information in your database.

The Practice Explorer toolbar

Click the **New Report** button to start a new report.



Click the **New Tally** button to start a new tally.

Click the **New Update** button to add or update reminder information in patient records.

Click the **Open Saved Criteria** button to view pre-designed reports and tallies and those created and saved by practice staff.

Click the **Save Current Criteria** button to save the current criteria listed for report, tally or update.

Click the **Run Criteria** button to run the report, tally or update.

Click the **Delete Row** button to remove criteria listed for a report, tally or update.

Understanding Practice Explorer

The database

The Cornerstone database (cstone.db) contains information saved from Cornerstone Foundation and any Cornerstone modules you use. The database stores all your Cornerstone data. Each time you make changes in your software, information is added to (or updated in) the database. Practice Explorer allows you to retrieve, analyze or change information in your Cornerstone database.

Categories and tables

The Cornerstone database is made up of many tables that contain rows of information organized in columns. The information is stored by type.

In Practice Explorer, database tables are called categories. Columns in the database table are known as fields in Practice Explorer. For example, if you select “Client” as the category and “client ID” as the field, Practice Explorer will access the client table and client ID column in the database.

Sometimes, the name of the table is different than the category.

Relationships between categories

Some categories are related to other categories through the information they contain. For example, a relationship exists between the Account Transactions category and the Client category because they both contain the Client ID field.

Because the Cornerstone database is a relational database, you can only select information related to previous information you have selected.

Structured Query Language

The standard language used to gather information from databases is called SQL (Structured Query Language). A query is the request to gather information from the database. Practice Explorer allows users to make a “query” of the database without knowing a special programming language.

When you create or run a Practice Explorer report, tally or update, the actual SQL text is displayed in the box under the Selection, Output and Update tabs.

```
SELECT RECORDS WHERE  Client Aged 90 > 5.00  And Client Client ID Not In ( SELECT CLIENT.aged90 FROM
CLACTPAY,CLIENT WHERE (CLIENT.clientid = CLACTPAY.clientid) AND (   DATE(CLACTPAY.txn_date)  >'2002-05-15'    ) )
```

If you want to save the actual SQL statement, see Preferences on page 5.

Codes for information

Information (or data) is saved in several ways in the database. When you select an item from a list in Cornerstone, the database often saves a code for your selection which refers to the text that appeared in the list.

Example: A practice may have several invoice types (boarding, dental, emergency, examination, etc.). If the invoice type of *examination* is used on an invoice, the word “examination” is not saved with the invoice. Instead, a number that represents “examination” (from the Invoice Types table in the database) is saved with the invoice.

Operators

When you build a query, Practice Explorer puts your requests into SQL.

Operator	Symbol	What will be selected
Is	=	An equal value specified
Is Less Than	<	Dates prior to the specified date; Amounts lower than the specified amount
Is Greater Than	>	Dates after the specified date; Amounts higher than the specified amount
Is Less Than or Equal to	<=	Dates on or before the specified date; Amounts equal to or lower than the specified amount
Is Greater Than or Equal to	=>	Dates on or after the specified date; Amounts equal to or higher than the specified amount
Is Not Equal to	<>	Any value other than the one specified
Is Null	NULL	Any field that is blank (has no value in it)
Is Not Null	IS NOT NULL	Any field that is not blank (has an entry)

Operators used only when creating nested reports

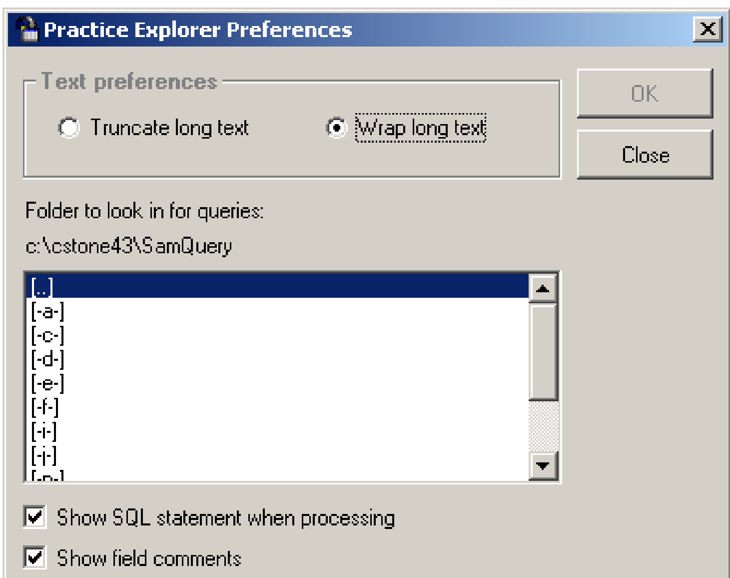
Is In Report	IN	Find additional information to narrow the selection in your query
Is Not In Report	NOT IN	Find information that does not exist in your query

Preferences

Practice Explorer preferences provide you with some ways to customize the software to suit your practice's needs.

Setting preferences

1 On the **File** menu, select **Preferences**.
2 Specify whether to **Truncate long text** or **Wrap long text**. Truncating long text prevents long comments from displaying completely.
3 Select the **Folder to look in for queries**. Practice Explorer looks in this folder for reports, tallies and updates, which are saved in this folder by default.
4 Click the **Show SQL statement when processing** check box to view or save queries in the SQL. If this option is selected, the Report SQL dialog box displays when you run a query. The SQL statement shows your report, tally or update as it appears in the SQL language. This statement is often used by support as a method of troubleshooting.
5 Deselect the **Show field comments** check box if you do not want specific help comments to appear as you select categories and fields.
6 Click **OK** to save your changes.



Quick Start - Using a Pre-Designed Report

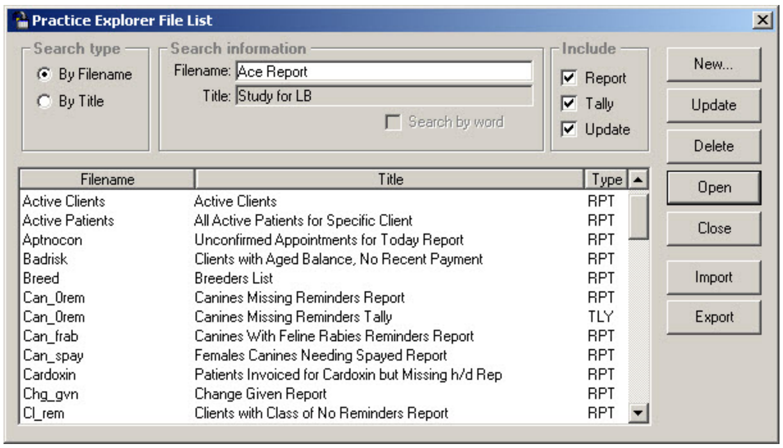
This section allows you to get started quickly by using pre-designed reports that come with the software. These "canned queries" gather information from the Cornerstone database that can be used to analyze the productivity of the practice and determine opportunities to generate revenue.

Note You should always verify practice-specific fields such as IDs, as well as transaction dates and some of the database fields before running a query.

See the "Pre-Designed Reports" section beginning on page 40 for a complete listing of all pre-designed reports including information on the file name, title, description, summary of displayed information, and nested values (where applicable) for each report.

1 Start Practice Explorer.

2 On the **File** menu, select **Open**, or click the **Open Saved Criteria** toolbar button . The Practice Explorer File List dialog box appears.



3 Highlight the report you want to run and click **Open**, or double-click the title of the report.

4 The report criteria window opens. If necessary, make changes to the selection conditions and adjust any criteria and/or output. See page 13 for more information about changing your selection conditions.

5 Click the **Run Criteria** toolbar button to run the report.

6 In the Report Options dialog box, select your Output Type and click **OK**.
   - **Print Preview** to display on screen with the option to print
   - **Print** to send directly to the printer
   - **Export** to save the data to a file

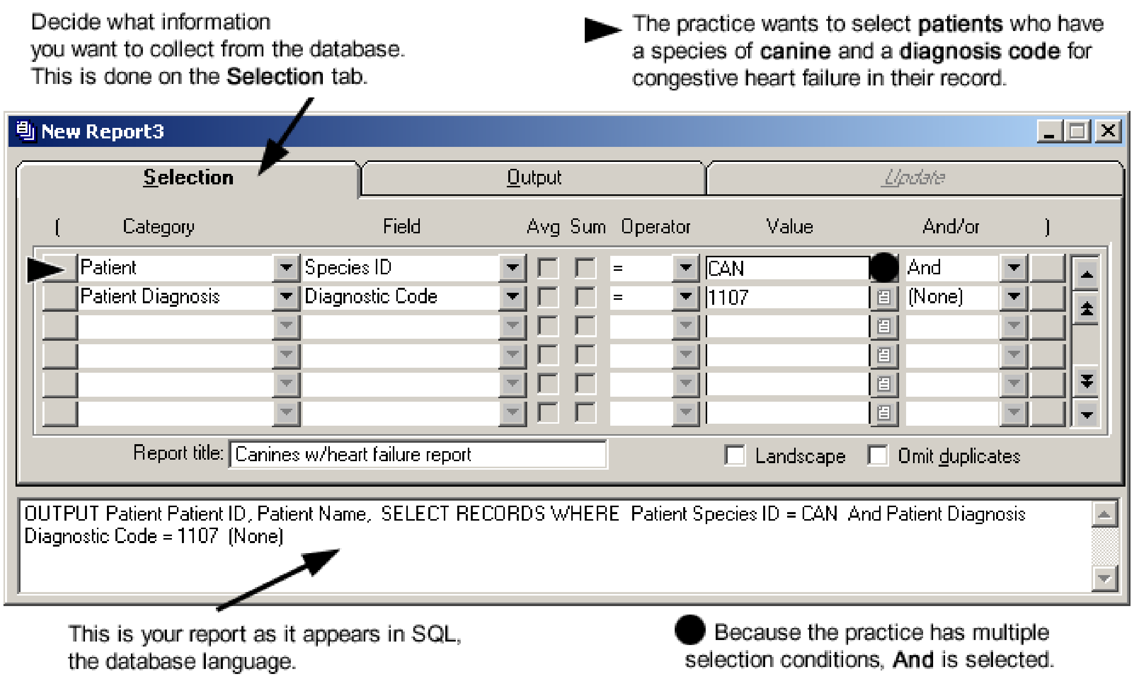
7 The Report SQL dialog box displays if you have the Show SQL Statement When Processing option in preferences selected. Click **OK** to run the report.

Analysis of a Report

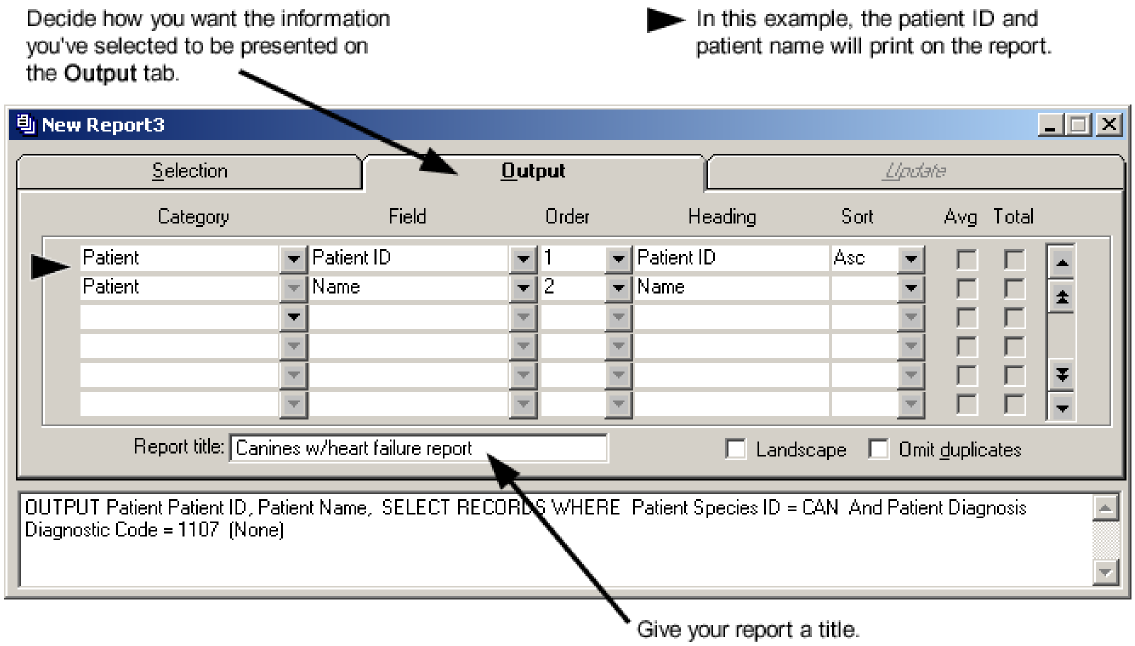
One of the easiest ways to understand Practice Explorer is to take a look at a practical example.

Example: Anywhere Animal Practice wanted to see a list of all canines that suffered from a diagnosis of congestive heart failure.

Screen 1



Screen 2

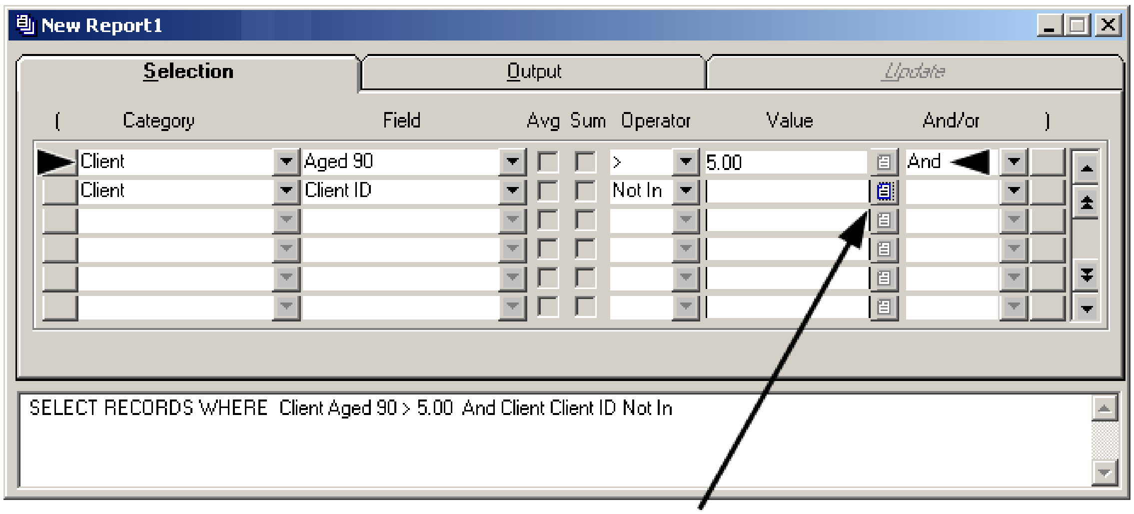

Decide how you want the information you've selected to be presented on the Output tab.
In this example, the patient ID and patient name will print on the report.
New Report3
Selection
Output
Update
Category
Field
Order
Heading
Sort
Avg
Total
Patient
Patient ID
1
Patient ID
Asc
Patient
Name
2
Name
Report title:
Canines w/heart failure report
Landscape
Omit duplicates
OUTPUT Patient Patient ID, Patient Name, SELECT RECORDS WHERE Patient Species ID = CAN And Patient Diagnosis Diagnostic Code = 1107 (None)
Give your report a title.

Analysis of a Nested Report

Example: In June 2002, Anywhere Animal Practice decided to design a report to show all clients who have a balance over $5.00 that is over 90 days and who have not made a payment in the last 30 days.

Screen 1

The practice wants to select **clients** who have a balance of **$5.00** that is over **90 days**.



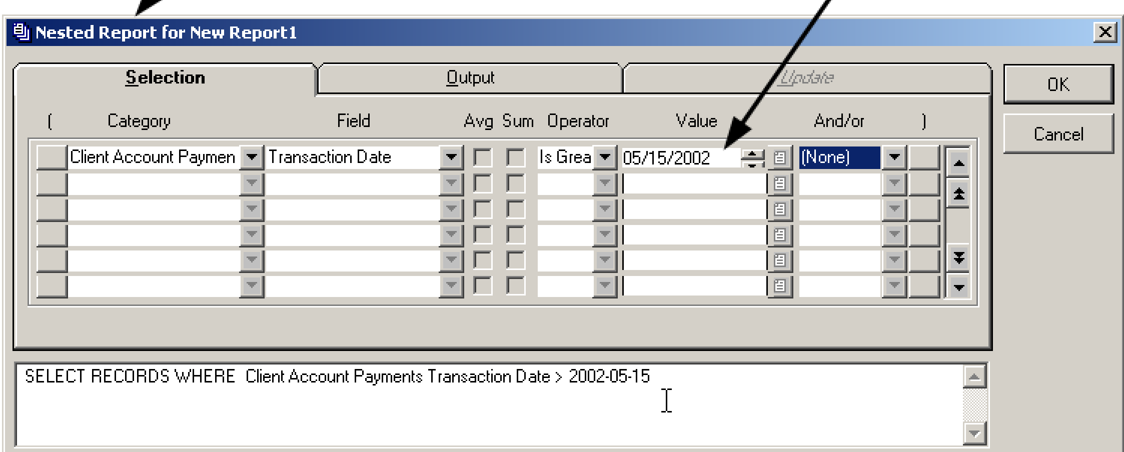
Because the practice has multiple selection conditions, **And** is selected. Another line is added to select clients who have not made a payment in the last 30 days.

Nested reports are reports that reside within a report. Click the **nested report** icon to launch another window and design a new report as a subset of this one.

Screen 2

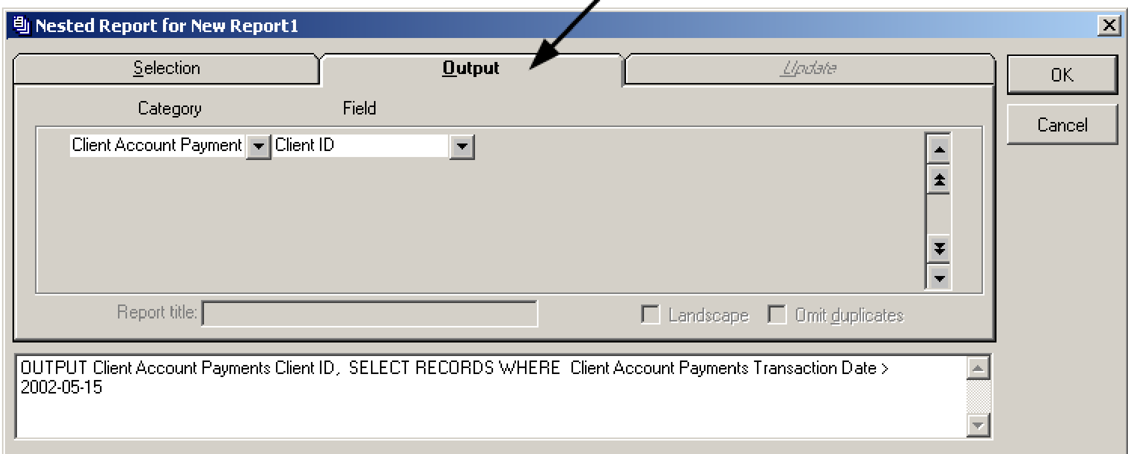
A new window displays for the design of your nested report.

This nested report is selecting client payments that have been made since May 15, 2002. When this report is run again, a different date may be selected.



Screen 3

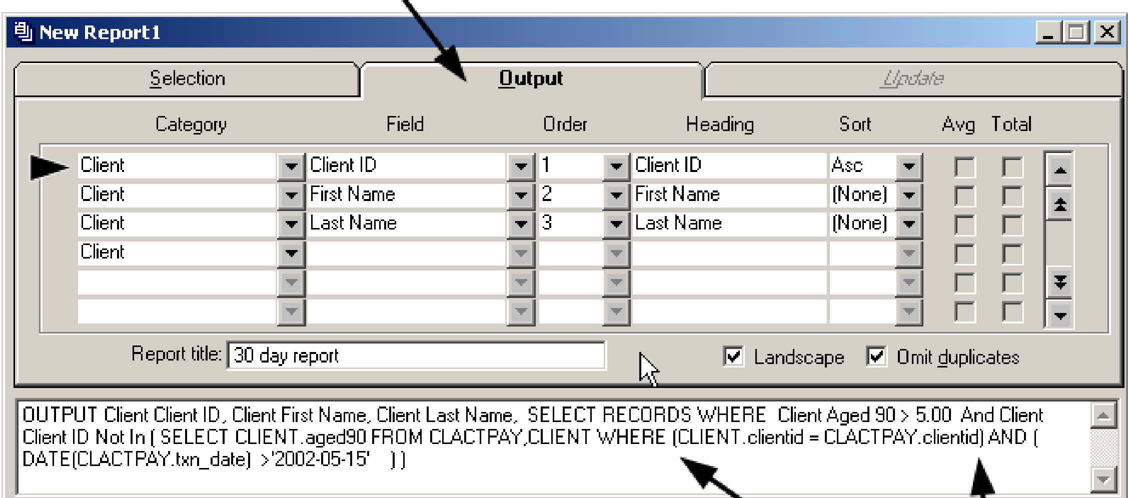
Click the **Output** tab to arrange the results of the nested report. The practice wants all client IDs of the clients who were selected by the nested report.



Screen 4

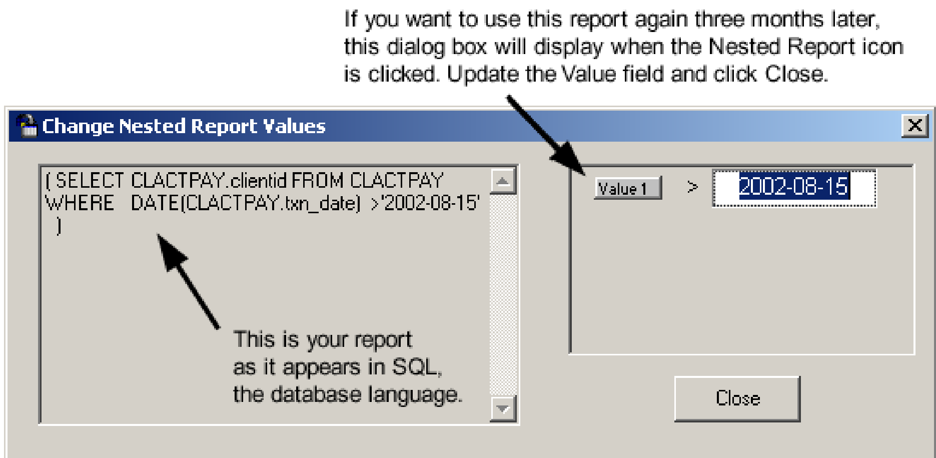
Decide how you want the information you've selected to be presented on the **Output** tab.

In this example, the client ID and the clients' first and last names will print on the report.



Notice the parenthesis which group your selection conditions together.

Screen 5


If you want to use this report again three months later, this dialog box will display when the Nested Report icon is clicked. Update the Value field and click Close.
Change Nested Report Values
(SELECT CLACTPAY.clientid FROM CLACTPAY WHERE DATE(CLACTPAY.txn_date) >'2002-08-15')
This is your report as it appears in SQL, the database language.
Value 1
>
2002-08-15
Close

Creating Reports

You can create your own Practice Explorer reports. See page 4 for background information on your Cornerstone database.

Tip You may find it helpful to use a form to design reports. See page 48 for a sample of a query details form.

1. On the **File** menu, select **New**, then select **Report**, or click the **New Report** toolbar button . The Selection tab displays.
2. Enter your selection conditions. See page 13 for more information.
3. Group your conditions. See page 14 for more information.
4. Decide if you need to use a nested report. See page 15 for more information.
5. Enter the fields you would like to **Output** to the report.
6. Click the **Save** button to save your new report.
7. To run the report, click the **Run Criteria** toolbar button .
8. Verify the information displayed on the report is accurate by selecting a random number of line items and accessing the information within Cornerstone.

Enter selection conditions

You must have at least one selection condition in your report. Practice Explorer will display help about each category and field if you have this option selected in Preferences. See page 6 for more information.

1. From the **Category** drop-down list, select the type of information for which you want to search. See page 29 for a list of categories.
2. From the **Field** drop-down list, select the specific information (within the category) for which you want to search.
3. The **Avg** and **Sum** check boxes are active for only certain categories and fields. If necessary, select either of these check boxes to display the information on the report. See page 14 for more information.
4. From the **Operator** drop-down list, select the condition that must be met before the data is selected. See page 5 for a list of operators.
5. Enter the **Value** you are searching for. Often times, you can press F2 to select the value from a list.
6. If you want to enter more than one selection line, you must specify how the next selection line relates to the lines you have already entered. From the **And/Or** drop-down list, select **And** to include records that meet all the conditions you have entered; select **Or** to include records that meeting either or any of the conditions entered.
7. Repeat steps 2–6 to add selection conditions.

Averages and sums on reports

When using certain categories and fields, you may find it useful to have Practice Explorer automatically average or total quantities or dollar amounts.

To display the total average or sum on the bottom of the report, click the **Avg** or **Sum** check box.

Note You may only choose to display either average or sum, but not both.

The table lists the categories and fields when this feature can be used.

Category	Field
Account Transactions	Invoice Totals
EOM Client Summary	Total Number of Visits
Patient Visit	PVL Totals
Transaction Discounts	Total discount amount
Transaction	Total Invoice Price, Total Quantity
Transaction Discounts	Total Discount Amount

Grouping conditions

The parentheses buttons are used to group conditions. Practice Explorer selects the records that meet these conditions first. The remaining condition rows are then applied to this group of records.

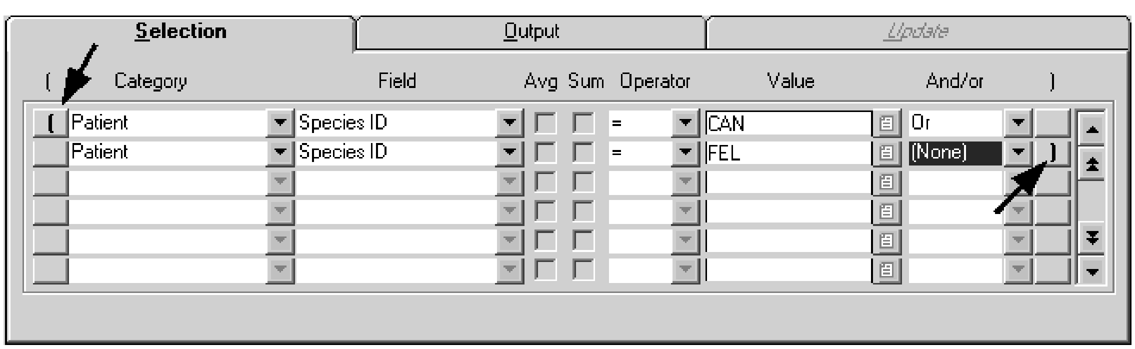
For each starting parenthesis, you must have an ending parenthesis.

Example: Where {(date 1 and date 2) and (item 1 or item 2)}…

First the dates will be selected, and then the items will be selected. Second, all other conditions will be applied to this group.

To add parentheses, click the button at the beginning of the first condition row in the group. Click the button to the right of the And/Or box of the group's last condition.

Example: Anywhere Animal Practice begins writing a new report by selecting all patients who are canines *or* felines. Selecting patients in this manner narrows the search immediately, ensuring that other patients (avian, exotics, etc.) are not included in the report. Parentheses are used to group these conditions together.



Understanding nested reports

Nested reports are used to find information that does **not** exist in the selected records or to create a "sub-report" that narrows the selection of records. It will search the database for this information first, narrowing the information that will be searched within the main criteria search area.

Example: Anywhere Animal Practice wants to find all canines or felines over six months who have **not** had a dental exam.

Take a closer look at what the practice is looking for:

1 Active patients,

2 ***And*** who are canine ***or*** feline,

3 ***And*** who are older than six months,

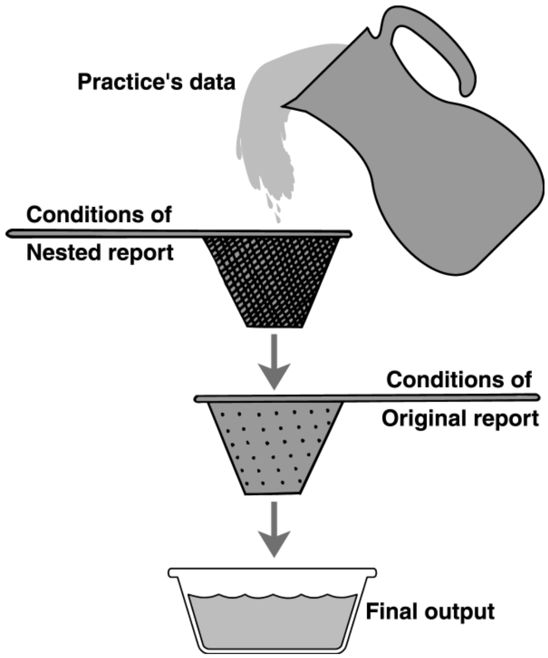
4 ***And*** who **DON'T** have the item ID for dental exam in their record.

The practice could use one report to find the first three conditions, but condition 4 presents a problem. The dental exam item ID is **not** present in the records found by the first three conditions. The only way to select information that exists separately from your other conditions is to build a nested report.

A nested report is a separate set of conditions that is saved within another report.

Practice Explorer runs the nested report(s) first. When results are compiled from the nested report(s), the original report will run against the results.

Generally, nested reports are put in as the last selection condition. If you put a nested report as the first selection condition in the original report, then make a change to selection condition lines after the nested report line, you will lose your nested report line.



Another way to look at nested reports is to look at it as the first filter that your data is poured through. Only the data that gets through the first filter will be poured through the second filter of the original report.

Using nested reports

Note After you OK a nested report, the conditions in the report cannot be changed. If you reopen a nested report, you will only have the option of modifying the values from the saved nested report.

1. On the **Selection** tab, at the **Operator** drop-down list, select **In Report** or **Not in Report**.
2. Click the nested report icon. 
3. Enter the selection conditions and select the output.
4. Click **OK** when finished to return to the original report.

Changing Reports

Preloaded and existing reports can be changed. If you are using preloaded reports, check to make sure that the values in the report match the values you use in your practice. For example, you may need to enter client or patient IDs, or user-defined prompts. You also may need to change the dates in preloaded reports.

Use care when changing categories in a report. If you change a **category**, you may lose related selection rows. For example, if the report is set up to select from the “client” category and you change the category to “patient,” any selection rows related to the client category will be lost.

If you change a **field**, you will not lose any related conditions.

Changing the data to be selected

1. On the **File** menu, select **Open**, or click the **Open Saved Criteria** toolbar button .
2. Highlight the report you want to change and click **Open**.
3. On the **Selection** tab click in the row to change.
4. Change the Field or Category. To delete a row, press CTRL+D or click the **Delete Row** toolbar button . If you may lose rows related to the row you want to delete, a message will display.
5. Enter a **Category**, **Field**, **Operator** and **Value** as usual.

Changing the report’s output

1. On the **File** menu, select **Open**, or click the **Open Saved Criteria** toolbar button .
2. Highlight the report you want to change and click **Open**.
3. On the **Output** tab click in the row to change.
4. Change the **Field** or **Category**. To delete a row, press CTRL+D or click the **Delete Row** toolbar button . If you may lose rows related to the row you want to delete, a message will display.
5. Enter an **Order** in which the column will appear on the report, the **Heading** that will display on the report, and the **Sort** order, if applicable.
6. You can enter a Report title that displays as the header on the report.
7. Place a checkmark in the **Landscape** checkbox to display the information in landscape format on the report.
8. Place a checkmark in the **Omit duplicates** checkbox to prevent duplicate records from appears in the report.

Exporting Data from Reports

You can export Practice Explorer files to use the data in other programs. If you would like to merge this information into a Cornerstone correspondence document, save the report as a comma separated (.CSV) file. If you would like to merge this information to a Microsoft Word document, save the report as a text (.txt) file.

These export formats are available: Comma separated (*.CSV), Text format (*.txt), Microsoft Excel format (*.xls), Microsoft Multiplan (*.slk), Lotus 1-2-3 (*.wks) or (*.wk1), Data Interchange (*.DIF), and dBase-III format (*.DBF).

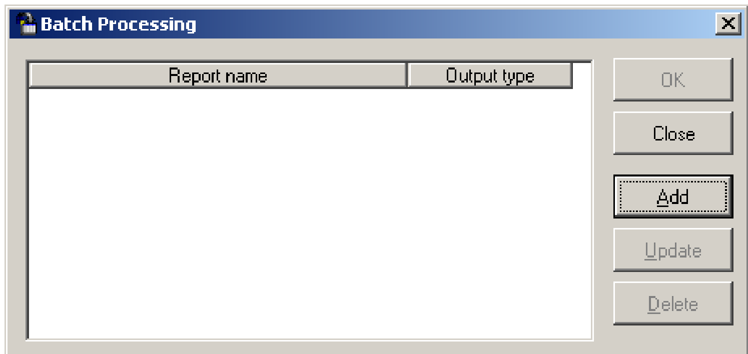
Exporting a single report

1. From an open report criteria window, click the **Run Criteria** toolbar button.
2. On the Report Options dialog box, select **Export** as the output type. The file name and location displays.
3. To change the file name or location, select **Browse**. Change the file name, type of file or location and click **OK**.
4. Click **OK** to export the report.

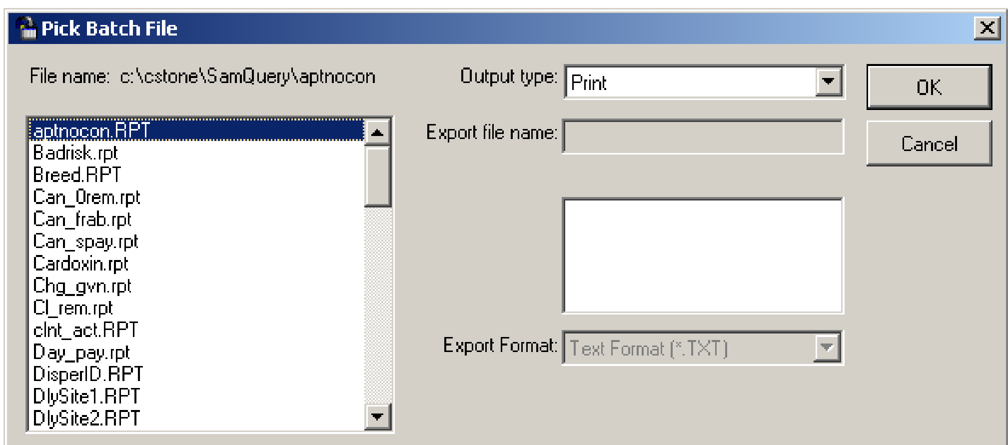
Tip You can also click **Save** if previewing a report and follow steps 3–4.

Running Reports in Batches

1 On the **File** menu, select **Run Report Batch**.



2 Click **Add**. The Pick Batch File dialog box displays.



3 Click on a file name to select it.

4 Select your output type and click **OK**.

- **Print Preview** to display on screen with the option to print
- **Print** to send directly to the printer
- **Export** to save the data to a file

5 Click **OK** to return to the Batch Processing dialog box.

6 Repeat steps 2–5 to add more reports to the batch.

- To update the report list, select the report to replace, click **Update** and change the applicable settings and select a different report.
- To remove a report from the batch, highlight the report to remove and click **Delete**.

7 Click **OK** to run the batch.

Using Tallies

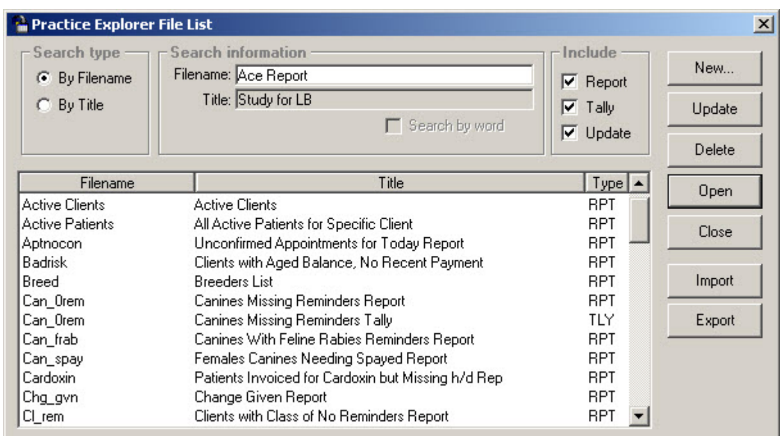
A tally works the same way as a report, but instead of providing a detailed report to be printed, it just gives you a count of the number of records that matched your selections.

Creating a tally

1. On the **File** menu, select **New**, then select **Tally**, or click the **New Tally** toolbar button. The Selection tab displays.
2. Enter your selection conditions. See page 13 for more information.
   - Group your conditions. See page 14 for more information.
   - Decide if you need to use a nested report. See page 15 for more information.
3. Click the **Save** button to save your new tally.
4. Click the **Run Criteria** toolbar button to run the tally.
5. When Practice Explorer is finished running the tally, the results will display in the Tally Results box. Click **OK** to close the box.

Running an existing tally

1. On the **File** menu, select **Open**, or click the **Open Saved Criteria** toolbar button. The Practice Explorer File List dialog box appears.



2. Highlight the tally you want to run and click **Open**, or double-click the title of the tally.
3. The tally will open. If necessary, make changes to the selection conditions. See page 13 for more information about changing your selection conditions.
4. Click the **Run Criteria** toolbar button to run the tally.
5. When Practice Explorer is finished running the tally, the results will display in the Tally Results box. Click **OK** to close the box.

Customizing Reminders

The ability to add and modify patient reminders in the Cornerstone database is a powerful tool included in Practice Explorer.

WARNING: Remember, this feature will change information in your database. Back up the Cornerstone database (cstone.db) before creating or running a database update.

Tip Before running, creating or updating reminders in your database, run a report with the same selection conditions entered. This will allow you to verify your results before actually making changes to your database.

Running updates

If you have saved reminder updates, you can run the update to create or change patient reminders in the Cornerstone database.

1. On the **File** menu, select **Open**, or click the **Open Saved Criteria** toolbar button. The Practice Explorer File List dialog box appears.
2. Highlight the update file name and click **Open**, or double-click the title of the update.
3. Modify the **Selection** and **Update** information if necessary.
4. Click the **Run Criteria** toolbar button. A warning message appears before changing the database.
5. Choose **Yes**. Practice Explorer will update the Cornerstone database.

After running an update, you can run a tally or report to see the changes you have made.

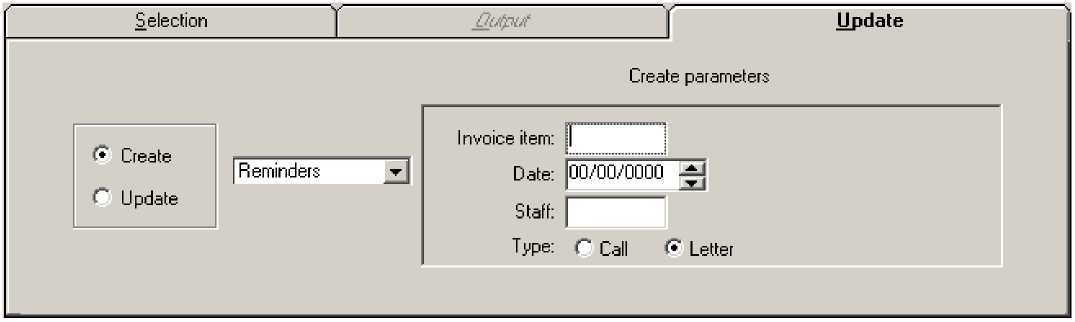
Creating reminders in the Cornerstone database

You can create reminders for patients that meet specific criteria using the Update tab. This option can be used to generate reminders for new services and products or to generate specific non-recurring reminders such as those for dental exams.

If a reminder with the same item ID and reminder type (call or letter) already exists, the existing record is not changed. Reminders are not created for deceased or inactive patients.

Note The Reminders Not Created dialog box appears to notify you of any reminders which were not created and why. For each reminder created, this dialog box displays the patient ID, patient name and status (reason the reminder was not created). Choose **Print** to print this information in the Reminders Not Created Report.

1. On the **File** menu, select **New**, then select **Update**, or click the **New Update** toolbar button .
2. On the **Selection** tab, enter the selection conditions. The first condition must be from a patient-related category.
3. Click the **Update** tab and click the **Create** option.



4 Enter the invoice item ID for which you want to generate the reminder. Press F2 to select an invoice item.
5 Enter the date the reminder should be generated.
6 Enter the staff ID. Press F2 to select a staff member.
7 Specify the reminder type (call or letter).
8 Save the update. The update can be run at any time.

Updating reminders in the Cornerstone database

You can update reminders in the Cornerstone database. This feature can be used to update seasonal reminder dates (to make sure they are sent at an appropriate time of year) or to change reminder dates for different groups of owners.

1 On the **File** menu, select **New**, then select **Update**, or click the **New Update** toolbar button .
2 On the **Selection** tab, enter the selection conditions. The first condition must be from a patient-related category.
3 Click the **Update** tab, and then click the **Update** option. The information needed to update reminders displays.
4 Under **Parameter**, select Decrease by Days, Set to Date or Increase by Days.
5 Under **Value**, enter the applicable number or date.
6 Save the update. The update can be run at any time.

Additional Resources

List of Categories that are Connected to other Categories

Category	Connects information from these categories
Account Transactions	Client, Client Account Adjustments, Client Account Invoices, Client Account Payments, Client Account Refunds, Practice, Staff
Additional Holidays	Practice
Adjustment Reason	QOH Adjustments
Appointment	Client, Patient, Room, Staff
Appointment Template	Appointment Template Detail
Appointment Template Detail	Appointment Template, Room
Automatic Reminders	Invoice Item
Barn	Client, Patient
Breed	Patient, Species
Cashier Information	Client Account Payments, Client Account Refunds, Client Account Return Checks
Classic Medical Note Templates	Classic Medical Notes
Classic Medical Notes	Classic Medical Note Templates, Classic Medical Notes Problems Link, Patient, Practice
Classic Medical Notes Problems Link	Classic Medical Notes, Patient, Problems
Clients	Account Transactions, Appointment, Barn, Client Account Adjustments, Client Account Discounts, Client Account History, Client Account Invoices, Client Account Payments, Client Account Refunds, Client Account Return Checks, Client Account Write Offs, Client Classes, Client Defined Prompt Answers, Client Discounts, Client Phones, Credit Codes, EOM Client Summary, Estimate, Lab Results Header, Owner, Partnership, Patient Census, Patient Census History, Patient Visit, Practice, Prescription Labels, Secondary Names, Trainer
Client Account Adjustments	Account Transactions, Client
Client Account Discounts	Client, Client Account Invoices
Client Account History	Client
Client Account Invoices	Account Transactions, Client, Client Account Discounts, Practice, Transaction, Transaction Departing Instructions, Transaction Discounts, Transaction Special Actions, Transaction Taxes
Client Account Payments	Account Transactions, Cashier Information, Client, Payment Types, Practice
Client Account Refunds	Account Transactions, Cashier Information, Client
Client Account Return Checks	Cashier Information, Client
Client Account Write Offs	Client
Client Classes	Client
Client Defined Prompt Answers	Client, Client Defined Prompts
Client Defined Prompt List	Client Defined Prompts
Client Defined Prompts	Client Defined Prompt Answers, Client Defined Prompt Lists
Client Discounts	Client, Discounts

Category	**Connects information from these categories**
Client Phones	Client
Cost Center	Internal Usage
Credit Codes	Client
Default Usage Taxes	Invoice Item, Taxes
Departing Instructions	Invoice Item Departing Instructions
Diagnostic Codes	Exam Instructions, Exam Treatments, Patient Diagnosis, Subsystems, Systems, Treatment Templates
Discounts	Client Discounts, Estimate Discounts, Invoice Item Discounts, Transaction Discounts
Dispensing Item Link	Invoice Item
Document Items	Documents, Invoice Item
Documents	Documents Items, Invoice Item Special Actions, Patient Documents, PVL Special Actions, Transaction Special Actions
EOM Client Summary	Client
EOM Invoice Class Sales Summary	Invoice Item Classes, Practice
EOM Invoice Item Summary	Invoice Line
EOM Practice Summary	Practice
EOM Revenue Center Summary	Invoice Line, Revenue Center
EOM Revenue Center Summary by Location	Invoice Line, Location, Revenue Center
EOM Species Summary	Species
EOM Species Summary by Practice	Practice, Species
EOM Staff Commission by Revenue Center	Invoice Line, Revenue Center
EOM Staff Sales Summary	Invoice Line
Estimate	Client, Estimate Detail, Estimate Messages, Patient, Practice, Staff
Estimate Detail	Estimate, Estimate Discounts, Estimate Taxes, Invoice Item, Price Change Reasons, Revenue Center
Estimate Discounts	Discounts, Estimate Detail
Estimate Messages	Estimate
Estimate Taxes	Estimate Detail, Taxes
Exam Instructions	Diagnostic Codes, Exams, Instruction Headers
Exam Observations	Exams, Observation Types, Systems
Exam Treatments	Diagnostic Codes, Exams, Instruction Headers, Invoice Line, Price Change Reasons, Revenue Center
Exams	Exam Instructions, Exam Observations, Exam Treatments, Patient, Patient Diagnosis, Practice, System Templates
Group Items	Invoice Item
Image Source	Location, Revenue Center
Image Study	Patient
Instruction Headers	Exam Instructions, Exam Treatments, Treatment Templates
Internal Usage	Cost Center, Internal Usage Taxes, Invoice Line, Location
Internal Usage Taxes	Internal Usage
Inventory Reorder Points	Item Location, Location

Category	Connects information from these categories
Invoice Items	Automatic Reminders, Default Usage Taxes, Dispensing Item Link, Document Items, Estimate Detail, Group Items, Invoice Item Classes, Invoice Item Departing Instructions, Invoice Item Discounts, Invoice Item Qty Pricing, Invoice Item Rx Instructions, Invoice Item Special Actions, Invoice Item Subclasses, Invoice Item Taxes, Item Location, Item Vendor Information, Link Item, Location, Ordering Information, Patient Visit, Pick Invoice Items, QOH Adjustments, Reminders, Revenue Center, Satisfy Reminders, Travel Sheet Items, Treatment, Units of Measure, Vendor
Invoice Item Classes	EOM Invoice Class Sales Summary, Invoice Item, Invoice Item Classification Tax, Invoice Item Classification Usage Tax, Invoice Item Subclasses, Invoice Line, Revenue Center
Invoice Item Classification Tax	Invoice Item Classes, Taxes
Invoice Item Classification Usage Tax	Invoice Item Classes, Taxes
Invoice Item Departing Instructions	Departing Instructions, Invoice Item
Invoice Item Discounts	Discounts, Invoice Item
Invoice Item Pricing History	Invoice Line
Invoice Item QOH	Item Location, Location
Invoice Item Quantity Pricing	Invoice Item
Invoice Item Rx Instruction	Invoice Item, Prescription Instructions
Invoice Item Special Actions	Documents, Invoice Item, Special Action Apply Codes, Special Actions
Invoice Item Subclasses	Invoice Item, Invoice Item Classes, Invoice Line
Invoice Item Taxes	Invoice Item, Taxes
Invoice Line	EOM Invoice Item Summary, EOM Revenue Center Summary, EOM Revenue Center Summary by Location, EOM Staff Commission by Revenue Center, EOM Staff Sales Summary, Exam Treatments, Internal Usage, Invoice Item Classes, Invoice Item Pricing History, Invoice Item Subclasses, Place Order Detail, Prescription Labels, Receipt Distribution, Receive Order Detail, Reminders, Return to Vendor Detail, Revenue Center, Stock Transfer Items, Transaction, Units of Measure, Want List
Invoice Location	Inventory Reorder Points, Invoice Item, Invoice Item QOH, Location
Item Vendor Information	Invoice Item, Vendor
Lab Results	Patient
Lab Results Header	Client, Lab Templates, Patient
Lab Templates	Lab Results Header
Link Item	Invoice Item, Vendor
Location	EOM Revenue Center Summary by Location, Image Source, Internal usage, Inventory Reorder Points, Invoice Item, Invoice Item QOH, Item Location, Location Group, QOH Adjustments, Receipt Distribution, Return to Vendor Detail, Stock Transfer, Stock Transfer Items, Want List
Location Group	Location, Place Order, Want List
Observation Types	Exam Observations, Observations, System Template Details
Observations	Observation Types, Species, Systems
Order Changes	Place Order Detail
Order Information	Invoice Item
Owner	Client, Patient
Partnership	Client

Category	**Connects information from these categories**
Patient	Appointment, Barn, Breed, Classic Medical Notes, Classic Medical Notes Problems Link, Estimate, Exams, Image Study, Lab Results, Lab Results Header, Owner, Patient Census, Patient Census History, Patient Class, Patient Defined Prompt Answers, Patient Diagnosis, Patient Document Problems, Patient Documents, Patient Sex, Patient Visit, Patient Weights, Prescription Labels, Problems, Rabies Tags, Referral Patient Invoices, Referring Doctor/Hospital, Reminders, Species, Species Defined Prompt Answers, Trainer, Transaction, Transaction Departing Instructions
Patient Census	Client, Patient, Practice, Reason for Visit, Room
Patient Census History	Client, Patient, Practice, Reason for Visit, Room
Patient Class	Patient
Patient Defined Prompt Answers	Patient, Patient Defined Prompts
Patient Defined Prompt Lists	Patient Defined Prompts
Patient Defined Prompts	Patient Defined Prompt Answers, Patient Defined Prompt Lists
Patient Diagnosis	Diagnostic Codes, Exams, Patient
Patient Document Problems	Patient, Patient Documents, Problems
Patient Documents	Documents, Patient, Patient Document Problems, Practice
Patient Sex	Patient
Patient Visit	Client, Invoice Item, Patient, Practice Change Reasons, PVL Special Actions, Revenue Center
Patient Weights	Patient, Units of Weight
Payment Types	Client Account Payments
Pick Invoice Items	Invoice Item
Place Order	Location Group, Place Order Detail, Vendor
Place Order Detail	Invoice Line, Order Changes, Place Order, Receive Order Detail, Units of Measure
Practice	Account Transactions, Additional Holidays, Classic Medical Notes, Client, Client Account Invoices, Client Account Payments, EOM Invoice Class Sales Summary, EOM Practice Summary, EOM Species Summary by Practice, Estimate, Exams, Patient Census, Patient Census History, Patient Documents, Practice Phones, Prescription Labels, Rabies Tags, Revenue Center, Tax Summary by Practice
Practice Phones	Practice
Prescription Instructions	Invoice Item Rx Instructions
Prescription Labels	Client, Invoice Line, Patient, Practice
Price Change Reasons	Estimate Detail, Exam Treatments, Patient Visit, Transaction
Problem Categories	Problem Links
Problem Links	Problem Categories, Problem List
Problem List	Problem Links, Problem Severity, Problem States, Problems
Problem Severity	Problem List, Problems
Problem States	Problem List, Problems
Problems	Classic Medical Notes Problems Link, Patient, Patient Document Problems, Problem List, Problem Severity, Problem States
PVL Special Actions	Documents, Patient Visit, Special Action Apply Codes, Special Actions
QOH Adjustments	Adjustment Reason, Invoice Item, Location

Category	Connects information from these categories
Rabies Tags	Patient, Practice
Reason for Visit	Patient Census, Patient Census History
Receipt Distribution	Invoice Line, Location, Receive Order
Receive Order	Receipt Distribution, Receive Order Detail, Vendor
Receive Order Detail	Invoice Line, Place Order Detail, Receive Order, Units of Measure
Referral Patient Invoices	Patient, Referring Doctor Information, Referring Hospital Information
Referring Doctor Information	Referral Patient Invoices, Referring Doctor/Hospital Link
Referring Doctor/Hospital	Patient, Referring Doctor/Hospital Link
Referring Doctor/Hospital Link	Referring Doctor Information, Referring Doctor/Hospital, Referring Hospital Information
Referring Hospital Information	Referral Patient Invoices, Referring Doctor/Hospital Link
Reminders	Invoice Item, Invoice Line, Patient, Staff
Return to Vendor	Return to Vendor Detail, Vendor
Return to Vendor Detail	Invoice Line, Location, Return to Vendor, Units of Measure
Revenue Center	EOM Revenue Center Summary, EOM Revenue Center Summary by Location, EOM Staff Commission by Revenue Center, Estimate Detail, Exam Treatments, Image Source, Invoice Item, Invoice Item Classes, Invoice Line, Patient Visit, Practice, Staff, Tax Summary by Revenue Center, Transaction
Room	Appointment, Appointment Template Detail, Patient Census, Patient Census History, Staff, Staff Goals
Satisfy Reminders	Invoice Item
Secondary Names	Client
Special Action Apply Codes	Invoice Item Special Actions, PVL Special Actions, Special Action Availability, Special Actions, Transaction Special Actions
Special Action Availability	Special Action Apply Codes, Special Actions
Special Actions	Invoice Item Special Actions, PVL Special Actions, Special Action Apply Codes, Special Action Availability, Transaction Special Actions
Species	Breed, EOM Species Summary, EOM Species Summary by Practice, Observations, Patient, Species Defined Prompt Answers, Species Defined Prompts, System Templates, Treatment Templates, Units of Weight
Species Defined Prompt Answers	Patient, Species, Species Defined Prompts
Species Defined Prompt Lists	Species Defined Prompts
Species Defined Prompts	Species, Species Defined Prompt Answers, Species Defined Prompt Lists
Staff	Account Transactions, Appointment, Estimate, Reminders, Revenue Center, Room, Staff Class, Staff Defined Prompt Answers, Staff Goals, Staff Phone
Staff Class	Staff
Staff Defined Prompt Answers	Staff, Staff Defined Prompts
Staff Defined Prompt Lists	Staff Defined Prompts
Staff Defined Prompts	Staff Defined Prompt Answers, Staff Defined Prompt Lists
Staff Goals	Room, Staff
Staff Phones	Staff
Stock Transfer	Location, Stock Transfer Items

Category	Connects information from these categories
Stock Transfer Items	Invoice Line, Location, Stock Transfer, Units of Measure
Subsystems	Diagnostic Codes, Systems
System Template Details	Observation Types, System Templates, Systems
System Templates	Exams, Species, System Template Details
Systems	Diagnostic Codes, Exam Observations, Observations, Subsystems, System Template Details
Tax Summary by Practice	Practice, Taxes
Tax Summary by Revenue Center	Revenue Center
Taxes	Default Usage Tax, Estimate Taxes, Invoice Item Classification Tax, Invoice Item Classification Usage Taxes, Invoice Item Taxes, Tax Summary by Practice
Trainer	Client, Patient
Transaction	Client Account Invoices, Invoice Line, Patient, Price Change Reasons, Revenue Center, Transaction Discounts, Transaction Taxes
Transaction Departing Instructions	Client Account Invoices, Patient
Transaction Discounts	Client Account Invoices, Discounts, Transaction
Transaction Special Actions	Client Account Invoices, Documents, Special Action Apply Codes, Special Actions
Transaction Taxes	Client Account Invoices, Transaction
Travel Sheet Items	Invoice Item, Travel Sheets
Travel Sheets	Travel Sheet Items
Treatment	Invoice Item, Treatment Templates
Treatment Templates	Diagnostic Codes, Instruction Headers, Species, Treatment
Units of Measure	Invoice Item, Invoice Line, Place Order Detail, Receive Order Detail, Return to Vendor Detail, Stock Transfer Items Want List
Units of Weight	Patient Weights, Species
Vendor	Invoice Item, Item Vendor Information, Link Item, Place Order, Receive Order, Return to Vendor, Return to Vendor Detail, Vendor Phone, Want List
Vendor Phone	Vendor
Want List	Invoice Item, Location, Location Group, Units of Measure, Vendor

List of Available Categories and the Fields that Appear on Them

Category	Fields that appear on the category
Account Transactions	Amount - Client ID - Description - Invoice Totals - Practice ID - Staff ID - Staff Sequence - Transaction Date - Transaction Number - Transaction Type
Additional Holidays	Date - Holiday Name - Practice ID
Adjustment Reason	Active - Adjustment Reason ID - Description
Appointment	Amount Scheduled - Appointment Date - Appointment ID - Appointment Time - Appointment Type - Client ID - Date Appointed - Date Confirmed - Last Modified Date - Note - Patient ID - Prefix - Reason For Visit ID - Recurring ID - Room Number - Staff ID - Tickler Status - Time Slot - Time Units
Appointment Note	Date - Note ID - Note Text
Appointment Template	Description - End Time Slot - Start Time Slot - Template ID
Appointment Template Detail	Reason For Visit ID - Room Number - Template ID - Time Slot
Automatic Reminders	Ask for Months/Days - Days - Generate Invoice Item ID - Item ID - Months - Reminder ID - Type
Barn	Client ID - Patient ID - Reminders
Billing Messages	Description - Message Content - Message ID
Breed	Breed ID - Breed Name - Species ID
Cashier Information	Cashier ID - Name - Status
Classic Medical Note Templates	Days - Template Description - Template ID - Template Text - Template Type
Classic Medical Notes	Auto Finalize - Date Finalized - Days to Finalize - Finalizing Staff ID - First Transaction Number - Items Transferred - Medical Note - Patient ID - Practice ID - Staff ID - Staff Sequence - Status - Template ID - Transaction Date
Classic Medical Notes Problems Link	Patient ID - Problem ID - Transaction Date
Client	Aged 30 - Aged 60 - Aged 90 - Apply Billing - Apply Finance - Balance - Canceled Appointments - Class ID - Client ID - Client Type - Create Date - Credit Code - Current Month - E-Mail Address - E-Mail Reminders - Failed Appointments - Finance Charge - First Name - Last Invoice Date - Last Modified Date - Last Month - Last Name - Mailing Address 1 - Mailing Address 2 - Mailing City - Mailing Postal Code - Mailing State - Middle Initial - Note - Practice ID - Referred By - Status - Tax Exempt - Title
Client Account Adjustments	30 Days - 60 Days - 90 Days - Client ID - Current Month - Finance Charge - Last Month - Transaction Date - Transaction Number - Transfer Description
Client Account Discounts	Client ID - Invoice ID - Manual Discount Description - Transaction Date - Transaction Number
Client Account History	Aged 30 - Aged 60 - Aged 90 - Client ID - Current Billing Charge - Current Finance Charge - Current Month - Finance Charge - First Transaction Number - Last Month - Previous Balance - Transaction Date
Client Account Invoices	Cash Client Name - Client ID - Invoice ID - Invoice Type – Practice ID - Status - Transaction Date - Transaction Number

Category	Fields that appear on the category
Client Account Payments	Cashier - Change Given - Client ID - Deposit Date - Invoice ID - Payment Type ID - Practice ID - Prompt Answer - Transaction Date - Transaction Number
Client Account Refunds	Cashier - Client ID - Invoice ID - Transaction Date - Transaction Number
Client Account Return Checks	Alert - Cashier - Check Number - Client ID - Service Charge - Transaction Date - Transaction Number
Client Account Write Offs	Action - Aged 30 - Aged 60 - Aged 90 - Client ID - Current Month - Description - Finance Charge - Last Month - Transaction Date - Transaction Number
Client Alerts	Client Alert Description - Client Alert ID
Client Classes	Class ID - Client Alert - Description - Reminders - Send Statements
Client Defined Prompt Answers	Answer - Client ID - Prompt ID
Client Defined Prompt List	List Description - List ID - Prompt ID
Client Defined Prompts	Alert - Date Type - Encryption Flag - Prompt - Prompt ID - Required - Status
Client Discounts	Client ID - Discount ID
Client Phones	Client ID - Extension - Location - Note - Phone - Sequence
Cost Center	Active - Cost Center ID - Description
Credit Codes	Client Alert - Credit Code ID - Description
Default Usage Taxes	Invoice Item ID - Tax ID
Departing Instructions	Description - Instruction - Instruction ID
Diagnostic Codes	Default Status - Diagnostic Code - Diagnostic Code Sequence - Hospital Description - Send Reminders - Status -Subsystem ID - System ID - VPI Code Description - VPI State
Discounts	Description - Discount ID - Percentage - Sequence - Status
Dispensing Item Link	Dispensing Item ID - Invoice Item ID
Document Items	Description - Document ID - Item ID - Quantity
Documents	Description - Document ID - History Description - Show as Medical Note
End of Day	Close Date - First Transaction Number - Last Transaction Number - Note - Transaction Date
End of Month	Close Date - First Transaction Number - Last Transaction Number - Note - Summary Month - Summary Year - Transaction Date
End of Year	Close Date - First Transaction Number - Last Transaction Number - Note - Summary Year - Transaction Date
EOM Client Summary	Client ID - Date - First Transaction Number - Inventory Sales - Last Transaction Number - Month Number - Number of Visits - Payments - Service Sales - Total Number of Visits - Year Number
EOM Invoice Class Sales Summary	Class ID - Date - Discounts - First Transaction Number - Gross Sales - Last Transaction Number - Month Number - Practice ID - Year Number
EOM Invoice Item Summary	Date - First Transaction Number - Invoice Item ID - Invoice Item Sequence - Last Transaction Number - Month Number - Number of Invoices - Quantity - Total Cost - Total Price - Year Number

Category	Fields that appear on the category
EOM Practice Summary	30 Days - 60 Days - 90 Days - Active Clients - Adjustments - Billing Charges - Cash Refunds - Change Given - Current Finance Charge - Current Month - Date - Discounts - Finance Charges - First Transaction Number - Inactive Clients -Inventory Sales - Last Month - Last Transaction Number - Manual Discounts - Month Number - Number of Invoices - Number of New Clients - Number of New Patients - Payments - Practice ID - Returned Checks - Service Charges - Service Sales - Taxable Amount - Write offs - Year Number
EOM Revenue Center Summary	Date - First Transaction Number - Invoice Item ID - Invoice Item Sequence - Last Transaction Number - Month Number - Quantity - Revenue Center - Total Price - Year Number
EOM Revenue Center Summary by Location	Cost - Date - Discounts - First Transaction Number - Gross Sales - Invoice Item ID - Invoice Item Sequence - Last Transaction Number - Location ID - Manual Discounts - Month Number - Quantity Sold - Revenue Center - Year Number
EOM Species Summary	Active Patients - Date - Deceased Patients - Discounts - First Transaction Number - Inactive Patients - Inventory Quantity -Inventory Sales - Last Transaction Number - Month Number - Number of Invoices - Number of Visits - Service Quantity - Service Sales - Species ID - Taxes - Year Number
EOM Species Summary by Practice	Active Patients - Date - Deceased Patients - Discounts - First Transaction Number - Inactive Patients - Inventory Quantity -Inventory Sales - Last Transaction Number - Month Number - Number of Invoices - Number of Visits - Practice ID - Service Quantity - Service Sales - Species ID - Taxes - Year Number
EOM Staff Commission by Revenue Center	Date - First Transaction Number - Gross Commissions - Gross Sales - Invoice Item ID - Invoice Item Sequence - Last Transaction Number - Month Number - Net Commission - Number of Invoices - Quantity - Revenue Center - Staff ID - Staff Sequence - Total - Year Number - YTD Number of Invoices - YTD Quantity - YTD Total
EOM Staff Sales Summary	Date - First Transaction Number - Gross Commissions - Gross Sales - Invoice Item ID - Invoice Item Sequence - Last Transaction Number - Month Number - Net Commission - Number of Invoices - Quantity - Staff ID - Staff Sequence - Total - Year Number - YTD Number of Invoices - YTD Quantity - YTD Total
EOM Staff Summary	Date - Discounts - Distinct Number of Patients - First Transaction Number - Inventory Quantity - Inventory Sales - Last Transaction Number - Month Number - Number of Invoices - Number of Patients - Service Quantity - Service Sales - Staff ID - Staff Sequence - Taxes - Year Number
EOM Tax Summary	Date - First Transaction Number - Last Transaction Number - Month Number - Tax Amount - Tax ID - Tax Sequence - Taxable Amount - Year Number
Estimate	Amount - Cash Client Name - Client ID - Estimate Date - Estimate Description - Estimate ID - Expiration Date - Finalized - Message ID - Patient ID - Practice ID - Separate Page - Staff ID - Staff Sequence

Category	Fields that appear on the category
Estimate Detail	Dispensing Item ID - Dispensing Item Sequence - Estimate ID - Group Item ID - Group Item Sequence - Group Line Item - High Price - High Quantity - Invoice Item Sequence - Item ID - Line Item - Low Price - Low Quantity - Miscellaneous Item Description - Reason Code - Revenue Center - Staff ID - Staff Sequence - Sub Line Item - Transaction Date
Estimate Discounts	Discount ID - Discount Sequence - Estimate ID - Line Item - Sub Line Item
Estimate Message Defaults	Estimate Message - Estimate Message Description - Estimate Message ID - Sequence Number
Estimate Messages	Estimate ID - Estimate Message - Estimate Message Description - Estimate Message ID - Sequence Number
Estimate Taxes	Estimate ID - Line Item - Sub Line Item - Tax ID - Tax Sequence
Exam Instructions	Diagnostic Code - Diagnostic Sequence - Exam ID - Instruction ID - Order - Treatment Template ID
Exam Observations	Exam ID - Observation Text - Observation Type ID - Order - Patient ID - Print - System ID
Exam Treatments	Amount - Diagnostic Code - Diagnostic Sequence - Dispensing Item ID - Dispensing Item Sequence - Exam ID - Group Item ID - Group Item Sequence - Group Line Item - Instruction ID - Instruction Text - Invoice Item ID - Invoice Item Sequence - Line Item - Miscellaneous Item Description - Note - Print - Quantity - Reason Code - Revenue Center - Staff ID - Staff Sequence - Sub Line Item - Treatment Status - Treatment Type
Exams	Date Admitted - Date Released - Exam ID - Exam Message - Exam Message ID - Exam Status - Note - Patient ID - Practice ID - Release Instruction Footer Message ID - Release Instruction Header Message ID - Release Instructions Footer - Release Instructions Header - Staff ID - Staff Sequence - System Template ID - Technician ID - Technician Sequence
Group Items	Adjust Price - Adjust Price Amount - Adjust Price Method - Adjust Price Percent - Age Rule - Ask for Weight - Ask to Add - Group Item ID - Group Item Sequence - High Age Months - High Age Years - High Weight - Ignore Minimum Price - Item ID - Line Item - Low Age Months - Low Age Years - Low Weight - New Weight - Quantity - Sex ID 1 - Sex ID 2 - Species ID 1 - Species ID 2 - Species ID 3 - Species ID 4 - Weight Rule - Weight Unit
Image Location	Archive Location - Default Location - Location Description - Location ID - Path
Image Modality	Modality Type - Modality Type Description
Image Source	Source Description - Source ID
Image Study	Patient ID - Study Description - Study ID
Images	Comments - Create Date - Distance - Distance Units - Exposure - Exposure Units - File Name - KVP - Location ID - Modality ID - Patient ID - Source ID - Staff ID - Study ID - Title - Veterinarian ID - X-ray Number
Instruction Headers	Description - Instruction ID - Order
Internal Usage	Cost - Cost Center ID - Expiration Date - Internal Usage ID - Invoice Item Description - Invoice Item ID - Invoice Item Sequence - Location ID - Lot Number - Note - Quantity - Staff ID - Staff Sequence - Transaction Date - Usage Date

Category	Fields that appear on the category
Internal Usage Taxes	Internal Usage ID - Tax ID- Tax Sequence
Inventory EOM	EOM Transaction Date - EOM Transaction Number - Invoice Item ID - Quantity Adjusted - Quantity On Hand - Quantity Received - Quantity Returned
Inventory Reorder Points	Invoice Item ID - Location ID - Month From - Month To - Overstocked Quantity - Reorder Point - Reorder Quantity
Invoice Item	Allow Price Change - Auto Calculate Price - Buy UOM - Client Description - Controlled Substance - Dispensing Fee For Multiple Patients - Dispensing Fee - Dispensing Item Amount - Dispensing Item Method - Dispensing Item Percent - Estimate Markup - Hazardous Material - Hospital Description - Item Class ID - Item ID - Item Subclass ID - Item Type - Location - Maintain QOH - Minimum Price - Miscellaneous Item - MSDS - NDC/DIN Code - Override Drug Price - Pick Class ID - Pick Subclass ID - Primary Vendor - Revenue Center - Round to Nearest - Sell Ratio - Sequence - Serial Number - Status - Track Expiration Date - Track Lot Numbers - Unit of Measure - UPC Code
Invoice Item Classes	Active - Description - Item Class ID - Revenue Center
Invoice Item Classification Tax	Item Class ID - Tax ID
Invoice Item Classification Usage Tax	Item Class ID - Tax ID
Invoice Item Departing Instructions	Departing ID - Item ID
Invoice Item Discounts	Discount ID - Item ID
Invoice Item Pricing History	Item ID - Modified Date - Quantity From - Quantity Unit Price - Sequence
Invoice Item QOH	Expiration Date - Invoice Item ID - Invoice Item Sequence - Location ID - Lot Number - On Hand
Invoice Item Quantity Pricing	Item ID - Quantity From - Quantity Unit Price - Sequence
Invoice Item RX Instructions	Item - RX Instruction ID
Invoice Item Special Actions	Document ID - Item ID - Sequence - Special Action ID - Weight Days - When to Apply
Invoice Item Subclasses	Class Description - Item Class ID - Item Subclass ID
Invoice Item Taxes	Item ID - Tax ID
Invoice Line	Allow Price Change - Auto Calculate Price - Buy Barcode - Buy UOM - Client Description - Controlled Substance - Dispensing Fee for Multiple Patients - Dispensing Fee - Dispensing Item Amount - Dispensing Item Method - Dispensing Item Percent - Estimate Markup - Group Printing Flag - Hazardous Material - Hospital Description - Item Class ID - Item ID - Item Subclass ID - Item Type - Location - Maintain QOH - Minimum Price - Miscellaneous Item - MSDS - NDC/DIN Code - Override Drug Price - Pick Class ID - Pick Subclass ID - Primary Vendor - Revenue Center - Round to Nearest - Sell Ratio - Sequence - Serial Number - Status - Track Expiration Date - Track Lot Numbers - Unit of Measure - UPC Code
Invoice Types	Close at EOM - Description - Invoice Type ID
Invoice Location	Invoice Item ID - Location ID - On Hand
Item Vendor Information	Date - Invoice Item ID - Lead Time - Note - Price - Vendor ID- Vendor Item ID

Category	Fields that appear on the category
Lab Results	Critical High Range Value - Critical Low Range Value - Date/Time Run - High Range Value - High/Low Indicator - Lab Comments - Low Range Value - Marker Position - Operator - Patient ID - Template ID - Test Name - Test Value - Units
Lab Results Header	Client ID - Clinic Comments - Date/Time Run - Lab Comments - Lab ID - Manually Entered - Patient ID - Preliminary - Requisition Sequence Number - Requisition ID - Result Status - Staff ID - Staff Sequence - Template ID
Lab Templates	Description - Template ID
Link Item	Invoice Item ID - Link Item ID - Quantity
Location	Description - Location Group ID - Location ID - Status - Stock Order
Location Group	Active - Description - Location Group ID
Location Type	Description - Location Type ID
Observation Types	Observation Type Description - Observation Type ID
Observations	Default - Observation ID - Observation Type - Species ID - System ID - Text
Order Changes	Change ID - Expected Date - Order ID - Quantity - Sequence - Status
Ordering Information	Average Cost - Invoice Item ID - Last Cost - Last Purchase Date - On Back Order - On Hand - On Order - On Unsent Order - Total Cost
Owner	Beginning Date - Client ID - Ending Date - Patient ID - Percentage - Send Reminders - Status
Partnership	Member ID - Partnership ID - Percentage - Send Reminders - Sequence
Patient	Birth Date - Breed ID - Class ID - Color - Creation Date - Deceased Date - Last Invoice Date - Markings - Microchip ID - Name - Note - Patient ID - Patient Status - Registration - Sex ID - Species ID
Patient Alerts	Patient Alert Description - Patient Alert ID
Patient Census	Additional Comments - Cage - Check-in Date - Client ID - Patient ID - Practice ID - Reason ID - Staff ID - Staff Sequence - Status - Ward
Patient Census History	Additional Comments - Clients ID - Date In - Date Out - Patient ID - Practice ID - Reason ID - Staff ID - Staff Sequence
Patient Class	Class ID - Description - Patient Alert
Patient Color	Color ID - Description
Patient Defined Prompts Answers	Answer- Patient ID - Prompt ID
Patient Defined Prompt Lists	List Description - List ID - Prompt ID
Patient Defined Prompts	Alert - Data Type - Encryption Flag - Prompt - Prompt ID - Required - Status
Patient Diagnosis	Diagnosis Date - Diagnostic Code - Diagnostic Code Sequence - Exam ID - Final Diagnosis Date - Patient ID - Send Reminders - Staff ID - Staff Sequence - Status
Patient Document Problems	Date - Patient ID - Problem ID
Patient Documents	Change Date/Time - Client ID - Create Date - Create Date/Time - Date Finalized - Description - Document ID - Patient ID - Practice ID - Staff ID - Staff Sequence - User ID/Change - User ID/Create - User ID/Finalize - User Sequence/Change - User Sequence/Create
Patient Sex	Description - Modified Sex ID - Sex ID

Category	Fields that appear on the category
Patient Visit	Client ID - Dispensing Item ID - Dispensing Item Sequence - Group Item ID - Group Item Sequence - Group Line Item - Invoice Item ID - Invoice Item Sequence - Invoice Price - Item Status - Line Item - Miscellaneous Item Description - Patient ID - PVL Totals - Quantity - Reason Code - Revenue Center - Source - Source ID - Sub Line Item - Transaction Date
Patient Weights	Patient ID - Transaction Date - Voided - Weight - Weight Unit
Payment Types	Payment Type Description - Payment Type ID - Prompt - Type
Pick Invoice Items	Invoice Item ID - Pick Invoice Items
Place Order	Location Group ID - Order Date - Order ID - Order Status - Reference Number - Total - Vendor ID
Place Order Detail	Available to Receive - Cost - Invoice Item Description - Invoice Item ID - Invoice Item Sequence - Line Item - Note - Place Order ID - Quantity - Special - Staff ID - Staff Sequence - Status - Unit of Measure
Postal Codes	City - Postal Code - State
Practice	Address 1 - Address 2 - City - County - Postal Code - Practice ID - Practice Name 1 - Practice Name 2 - Primary Practice ID -Revenue Center - State
Practice Phones	Extension - Location - Note - Phone - Practice ID - Sequence
Prescription Instructions	Description - Instruction - Instruction ID
Prescription Labels	Apply Invoice - Client ID - Current Number of Refills – Dispensing Item ID - Dispensing Item Sequence - Expiration Date - Invoice Item Description - Invoice Item Sequence - Item ID - Patient ID - Practice ID - Prescription Date - Prescription Instruction - Prescription Instruction ID - Prescription Label ID - Prescription Type - Quantity - Staff ID - Staff Sequence - Total Number of Refills
Price Change Reasons	Reason Code - Reason Text - Status
Problem Categories	Category ID - Description
Problem Links	Category ID - Problem ID
Problem List	Description - Predefined - Problem ID - Severity ID - State ID - Status
Problem Severity	Description - Problem Severity ID
Problem States	Description - Final - Problem State ID
Problems	Change Date/Time - Change Staff ID - Change Staff Sequence - Create Date/Time - Create Staff ID - Create Staff Sequence - ID - Patient ID - Problem ID - Problem Severity ID - Problem State ID
PVL [Patient Visit List] Special Actions	Document ID - Line Item - Patient ID - Performed - Sequence - Special Action ID - Sub Line Item - Visit Type - Visit Type ID - Weight Days - When to Apply
QOH Adjustments	Adjusted Quantity - Adjusted Total - Adjustment Date - Adjustment Reason - Current Quantity - Current Total - Description - EOM Transaction Number - Expiration Date - Invoice Item ID - Location - Lot Number - Sequence - Status
Rabies Tags	Amount - Expiration Date - Lot Number- Manner- Patient ID - Practice ID – Producer - Staff ID - Staff Sequence - Tag Number - Transaction Date - Vaccine - Vaccine Type - Years
Reason For Visit	Description - Reason ID
Receipt Distribution	Expiration Date - Invoice Item ID - Location ID - Lot Number - Quantity - Receipt Number - Vendor ID

Category	Fields that appear on the category
Receive Order	Date Posted - EOM Transaction Date - EOM Transaction Number - Receipt Date - Receipt Number - Shipping Charge - Total - Total Tax - Vendor ID
Receive Order Detail	Cost - Invoice Item Description - Invoice Item ID - Invoice Item Sequence - Line Item - Note - Place Order ID - Quantity - Receipt Number - Special - Staff ID - Staff Sequence - Tax Amount - Unit Of Measure ID - Vendor ID
Referral Patient Invoices	Doctor ID - Hospital ID - Invoice ID - Patient ID - Recheck - Sales - Staff ID
Referring Doctor Information	Class ID - Doctor ID - E-Mail Address - Fax Number - First Name - Last Name - License - Mailing Address 1 - Mailing Address 2 - Mailing City - Mailing Postal Code - Mailing State - Middle Initial - Note - Send Information - Status - Title
Referring Doctor/Hospital	Date - Doctor ID - Hospital ID - Patient ID
Referring Doctor/Hospital Link	Doctor ID - Hospital ID
Referring Hospital Information	E-Mail Address - Fax Number - Hospital ID - Mailing Address 1 - Mailing Address 2 - Mailing City - Mailing Postal Code - Mailing State - Name - Note - Send Information - Status
Reminders	Invoice ID - Invoice Item ID - Invoice Item Sequence - Line Item - Note - Patient ID - Reminder Status - Sequence - Staff ID - Staff Sequence - Sub Line Item - Transaction Date - Type
Return To Vendor	EOM Transaction Date - EOM Transaction Number - Restocking Fee - Return Date - Return Number - RMA Number - Shipping Charge - Total - Total Tax - Vendor ID
Return To Vendor Detail	Cost - Expiration Date - Invoice Item Description - Invoice Item ID - Invoice Item Sequence - Line Item - Location ID - Lot Number - Note - Quantity - Receipt Number - Return Number - Staff ID - Staff Sequence - Tax Amount - Unit of Measure ID
Revenue Center	Name - Practice ID - Revenue ID
Room	Order of Display - Room Name - Room Number - Staff ID
Satisfy Reminders	Item ID - Satisfy Invoice Item ID
Secondary Names	Client ID - First Name - Last Name - Middle Initial - Print
Special Action Apply Codes	Special Action Apply Description - Special Action Apply ID
Special Action Availability	Special Action ID - When to Apply
Special Actions	Default When to Apply Code - Description - Special Action ID
Species	Large or Small - Species ID - Species Name - VPR Specie - Weight Unit ID - Weight Unit of Measure
Species Defined Prompt Answers	Answer - Patient ID - Prompt ID - Species ID
Species Defined Prompt Lists	List Description - List ID - Prompt ID
Species Defined Prompts	Data Type - Encryption Flag - Prompt - Prompt ID - Required - Species ID - Status
Staff	Address 1 - Address 2 - City - Class ID - First Name - Last Name - License Number - Middle Initial - Note - Postal Code - Revenue Center - Staff ID - Staff Sequence - State - Status - Title
Staff Class	Class ID - Description - Doctor Class
Staff Defined Prompt Answers	Answer - Prompt ID - Staff ID
Staff Defined Prompt Lists	List Description - List ID - Prompt ID

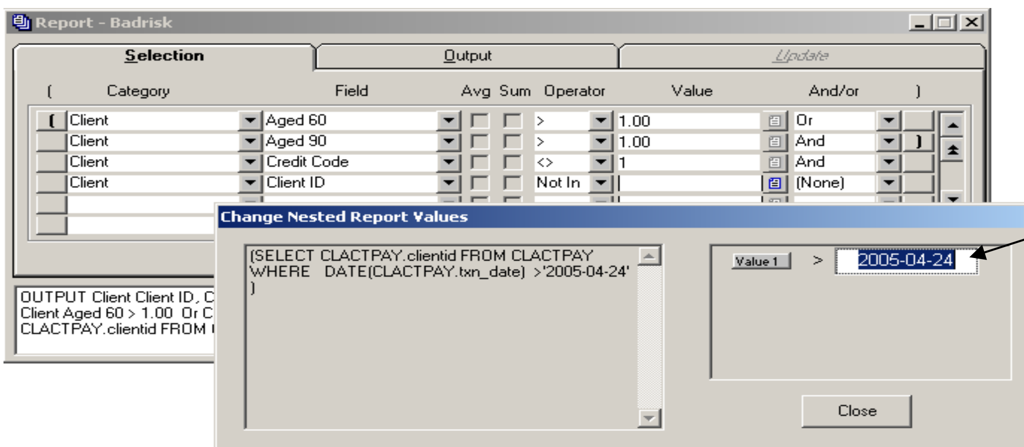
Category	Fields that appear on the category
Staff Defined Prompts	Data Type - Encryption Flag - Prompt - Prompt ID - Status
Staff Goals	Goal for Friday - Goal for Monday - Goal for Saturday - Goal for Sunday - Goal for Thursday - Goal for Tuesday - Goal for Wednesday - Room Number- Staff ID
Staff Phone	Extension - Location - Note - Phone - Sequence - Staff ID
Stock Transfer	Confirmed Staff ID - Confirmed Date - Date - Location ID - Staff ID - Value
Stock Transfer Items	Average Cost - Confirmed Quantity - Expiration Date - From Location ID - Invoice Item ID - Lot Number - Quantity - Unit of Measure
Subsystems	Description - Subsystem ID - System ID
System Template Details	Observation Type ID - Order - Print - System ID - System Template ID
System Templates	Default - Description - System Template ID
Systems	System Description - System ID
Tax Summary by Practice	Date - First Transaction Number - Last Transaction Number - Month Number - Practice ID - Sequence - Tax Amount - Tax ID - Tax Sequence - Taxable Amount - Year Number
Tax Summary by Revenue Center	Date - First Transaction Number - Last Transaction Number - Month Number - Revenue Center - Sequence - Tax Amount - Tax ID - Tax Sequence - Taxable Amount - Year Number
Taxes	Description - Percentage - Sequence - Status - Tax ID
Titles	Description - Title ID
Trainer	Client ID - Patient ID - Reminders
Transaction	Cost of Goods Sold - Dispensing Item ID - Dispensing Item Sequence - Group Item ID - Group Item Sequence - Group Line Item - Invoice ID - Invoice Item Sequence - Invoice Price - Item ID - Line Item Number - Miscellaneous Item Description - Patient ID - Quantity - Reason Code - Revenue Center - Staff ID - Staff Sequence - Sub Line Item Number - Total Invoice Price - Total Quantity - Transaction Date
Transaction Departing Instructions	Departing ID - Invoice ID - Line Item - Note - Patient ID - Sequence - Staff ID - Staff Sequence - Sub Line Item - Transaction Date
Transaction Discounts	Discount Amount - Discount ID - Discount Sequence - Invoice ID - Line Item - Sub Line Item - Total Discount Amount
Transaction Special Actions	Action Completed - Document ID - Invoice ID - Line Item Numbers - Special Action ID - Sub Line Item - Weight Days - When to Apply
Transaction Taxes	Amount - Invoice ID - Line Item Number - Sequence - Sub Line Item Number - Tax ID - Tax Sequence - Taxable Amount
Travel Sheet Items	Invoice Item ID - Travel Sheet ID
Travel Sheets	Travel Sheet Description - Travel Sheet ID
Treatment	Instruction Text - Invoice Item ID - Line Item - Note - Print - Quantity - Sub Line Item - Template ID - Treatment Status - Treatment Type
Treatment Templates	Default - Description - Diagnostic Code - Diagnostic Sequence - Instruction ID - Print - Species ID - Template ID
Units of Measure	Description - Measure ID
Units of Weight	Description - Weight Unit ID
Vendor	Account Number - Active - Mailing Address l - Mailing Address 2 - Mailing City - Mailing Postal Code - Mailing State - Note - Vendor Alert - Vendor ID - Vendor Name - Vendor Type - Web Address

Category	**Fields that appear on the category**
Vendor Phone	Contact - E-mail Address - Extension - Note - Phone Number - Phone Sequence - Primary - Vendor ID
Want List	Completed - Invoice Item ID - Location Group ID - Location ID - Quantity - Reason
Whiteboard All Patient Orders	Case Admit Date - Case Admit Date and Time - Case Attending Doctor First Name - Case Attending Doctor ID - Case Attending Doctor Last Name - Case Attending Doctor Middle Initial - Case Cage - Case Change Date - Case Change Date and Time - Case Change Staff First Name - Case Change Staff ID - Case Change Staff Last Name - Case Change Staff Middle Initial - Case Current Doctor First Name - Case Current Doctor ID - Case Current Doctor Last Name - Case Current Doctor Middle Initial - Case Discharge Date - Case Discharge Date and Time - Case ID - Case Sequence - Case Status - Case Ward - Client First Name - Client ID - Client Last Name - Client Middle Initial - Patient Birth Date - Patient Breed ID - Patient Breed Name - Patient ID - Patient Name - Patient Sex Description - Patient Sex ID - Patient Species ID - Patient Species Name - Tx Area - Tx Category - Tx Dose Now (Yes/No) - Tx Duration Days - Tx Duration Hours - Tx Frequency Description - Tx Frequency ID - Tx Instructions - Tx Item Billing Method - Tx Item Description - Tx Item ID - Tx Item Quantity - Tx Line Number - Tx Name - Tx Note Required - Tx PRN - Tx Staff Class Description - Tx Staff Class ID - Tx Start Date and Time - Tx Status ID - Tx Sub Line Number
Whiteboard Completed Late Treatments	Case Admit Date - Case Admit Date and Time - Case Attending Doctor First Name - Case Attending Doctor ID - Case Attending Doctor Last Name - Case Attending Doctor Middle Initial - Case Cage - Case Current Doctor First Name - Case Current Doctor ID - Case Current Doctor Last Name - Case Current Doctor Middle Initial - Case Discharge Date - Case Discharge Date and Time - Case Ward - Client First Name - Client ID - Client Last Name - Client Middle Initial - Comp Tx Actual Date and Time - Comp Tx Hours Performed Late - Comp Tx Processed Date and Time - Comp Tx Scheduled Date and Time - Comp Tx Staff First Name - Comp Tx Staff ID - Comp Tx Staff Last Name - Comp Tx Staff Middle Initial - Patient ID - Patient Name - Tx Area - Tx Category - Tx Duration Days - Tx Duration Hours - Tx Frequency Description - Tx Frequency ID - Tx Instruction - Tx Item Description - Tx Item ID - Tx Name - Tx PRN - Tx Staff Class Description - Tx Staff Class ID - Tx Start Date and Time
Whiteboard Completed Treatments	Case Admit Date - Case Admit Date and Time - Case Attending Doctor First Name - Case Attending Doctor ID - Case Attending Doctor Last Name - Case Attending Doctor Middle Initial - Case Cage - Case Current Doctor First Name - Case Current Doctor ID - Case Current Doctor Last Name - Case Current Doctor Middle Initial - Case Discharge Date - Case Discharge Date and Time - Case Ward - Client First Name - Client ID - Client Last Name - Client Middle Initial - Comp Tx Actual Date and Time - Comp Tx Processed Date and Time - Comp Tx Scheduled Date and Time - Comp Tx Staff First Name - Comp Tx Staff ID - Comp Tx Staff Last Name - Comp Tx Staff Middle Initial - Patient ID - Patient Name - Tx Area - Tx Category - Tx Duration Days - Tx Duration Hours - Tx Frequency Description - Tx Frequency ID - Tx Instruction - Tx Item Description - Tx Item ID - Tx Name - Tx PRN - Tx Staff Class Description - Tx Staff Class ID - Tx Start Date and Time

Category	Fields that appear on the category
Whiteboard Discontinued Treatments	Case Admit Date - Case Admit Date and Time - Case Attending Doctor First Name - Case Attending Doctor ID - Case Attending Doctor Last Name - Case Attending Doctor Middle Initial - Case Cage - Case Change Date - Case Change Date and Time - Case Change Staff First Name - Case Change Staff ID - Case Change Staff Last Name - Case Change Staff Middle Initial - Case Current Doctor First Name - Case Current Doctor ID - Case Current Doctor Last Name - Case Current Doctor Middle Initial - Case Discharge Date - Case Discharge Date and Time - Case ID - Case Sequence - Case Status - Case Ward - Client First Name - Client ID - Client Last Name - Client Middle Initial - Patient Birth Date - Patient Breed ID - Patient Breed Name - Patient ID - Patient Name - Patient Sex Description - Patient Sex ID - Patient Species ID - Patient Species Name - Tx Area - Tx Category - Tx Discontinued Date and Time - Tx Dose Now (Yes/No) - Tx Duration Days - Tx Duration Hours - Tx Frequency Description - Tx Frequency ID - Tx Instructions - Tx Item Billing Method - Tx Item Description - Tx Item ID - Tx Item Quantity - Tx Line Number - Tx Name - Tx Note Required - Tx PRN - Tx Staff Class Description - Tx Staff Class ID - Tx Start Date and Time - Tx Status ID - Tx Sub Line Number
Whiteboard Latest Patient Orders	Case Admit Date - Case Admit Date and Time - Case Attending Doctor First Name - Case Attending Doctor ID - Case Attending Doctor Last Name - Case Attending Doctor Middle Initial - Case Cage - Case Change Date - Case Change Date and Time - Case Change Staff First Name - Case Change Staff ID - Case Change Staff Last Name - Case Change Staff Middle Initial - Case Current Doctor First Name - Case Current Doctor ID - Case Current Doctor Last Name - Case Current Doctor Middle Initial - Case Discharge Date - Case Discharge Date and Time - Case ID - Case Sequence - Case Status - Case Ward - Client First Name - Client ID - Client Last Name - Client Middle Initial - Patient Birth Date - Patient Breed ID - Patient Breed Name - Patient ID - Patient Name - Patient Sex Description - Patient Sex ID - Patient Species ID - Patient Species Name - Tx Area - Tx Category - Tx Dose Now (Yes/No) - Tx Duration Days - Tx Duration Hours - Tx Frequency Description - Tx Frequency ID - Tx Instruction - Tx Item Billing Method - Tx Item Description - Tx Item ID - Tx Item Quantity - Tx Line Number - Tx Name - Tx Note Required - Tx PRN - Tx Staff Class Description - Tx Staff Class ID - Tx Start Date and Time - Tx Status ID - Tx Sub Line Number

Pre-Designed Reports

File Name	Title	Description	Report Display	Nested Values
Aptnocon	Unconfirmed Appointments for Today Report	Lists all patients that have appointments scheduled for a specific date and the appointment has not been confirmed within the Appointment Scheduler	Report displays Patient ID, Patient Name, Room Name, Staff First Name, Staff Last Name and Number of Records	N/A
Badrisk	Clients with Aged Balances, No Recent Payment	Lists all clients with an account balance over 60 days who have not made a payment recently, and have a credit code other than Cash Only	Report displays Client ID, First and Last Name, Balance, Credit Code, Average, Sum, and Number of Records	See Example Below



The nested value may be changed to reflect the practice search criteria.

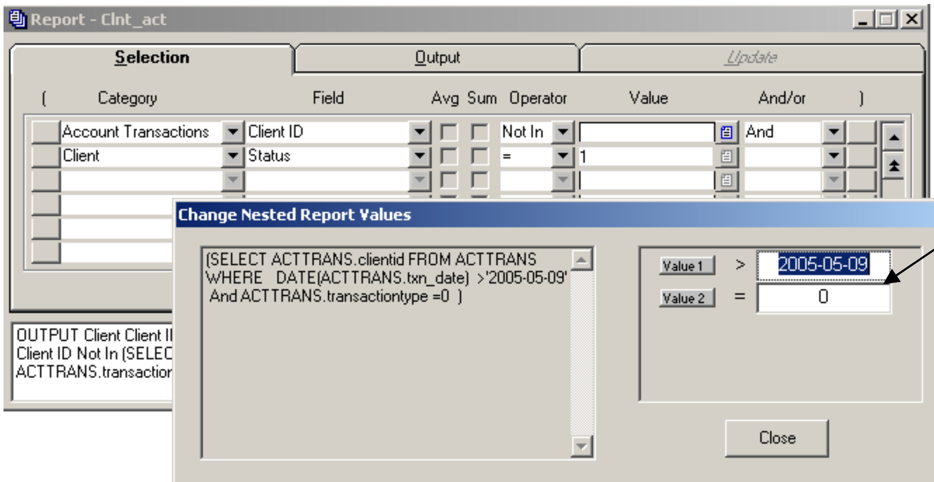
Value 1 → Payment Collection yyyy/mm/dd

(The nested search is excluding all clients who have made a payment after a specified date.)

Breed	Breeders List	Lists clients and phone numbers for a specific breed, color, age, and sex that have not been invoiced for specified services	Report displays Client First Name, Client Last Name, Phone Number, and Number of Records	Value 1 → Invoice Item ID Value 2 → Invoice Item ID Value 3 → Invoice Item ID (List items that should be excluded from the search criteria.)
Can_0rem	Canines Missing Reminders Report (The Canines Missing Reminders Tally displays a dialog box that contains a total number of these records.)	Lists all active canines who are missing reminders	Report displays Patient ID, Patient Name, Breed ID, Birth Date, Client ID and Number of Records	No value to enter. (The nested search is excluding all patients who have reminders listed within Cornerstone.)
Can_frab	Canines with Feline Rabies Reminders Report	Lists all active canines that have a feline rabies reminder	Report displays Patient ID, Patient Name, Client ID, Invoice Item ID, Transaction Date, and Number of Records	N/A

File Name	Title	Description	Report Display	Nested Values
Can_spay	Female Canines Needing Spayed Report	Lists all active canine females over six months old, not of a specified classification, that need to be spayed (Can modify for males needing neutering)	Report displays Patient ID, Name (of Patient), Client ID, Breed ID, and Number of Records	Value 1 → Invoice Item ID Value 2 → Invoice Item ID Value 3 → Invoice Item ID Value 4 → Invoice Item ID (List items that should be excluded from the search criteria. In this instance, the exclusion includes Canine Spay services. The nested search will exclude all patients who have been invoiced for the service(s) listed.)
Cardoxin	Patients Invoiced for Cardoxin but Missing h/d Report	Lists all active patients invoiced for Cardoxin but missing Hill's h/d diet sales	Report displays Patient ID, Name, Species ID, Client ID, Invoice ID, Transaction Date, and Number of Records	Value 1 → Invoice Item ID Value 2 → Invoice Item ID Value 3 → Invoice Item ID Value 4 → Invoice Item ID (List items that should be excluded from the search criteria. In this instance, the exclusion lists patients who have not been invoiced for Hill's h/d inventory items.)
Chg_gvn	Change Given Report	Lists all clients who were given change back from a payment within a specific date range	Report displays Client ID, First Name, Last Name, Change Given, Invoice ID, Average, Sum, and Number of Records	N/A
Cl_rem	Clients with Class of No Reminders Report	Lists all clients with a classification that does not have Send Reminders selected	Report displays Client ID, First Name, Last Name, 1=Active (Indicates which Classification the Client is assigned), Description (Classification with Send Reminder not selected), and Number of Records	N/A

File Name	Title	Description	Report Display	Nested Values
Clnt_act	Client Activity Report	Lists clients with no activity since a specified date	Report displays Client ID, Last Name, First Name, Balance and Number of Records	See Example Below



The nested value may be changed to reflect the practice search criteria.

Value 1 → Transaction Date (yyyy/mm/dd)

Value 2 → Transaction Type (0 = Invoice)

(The nested search is excluding all clients who have been invoiced since a specified date.)

DisperID	Discounts per ID Report	Lists which staff IDs gave discounts	Report displays Total Discount Amount - (SUM), Discount ID, Description (of Discount), Sum and Number or Records	N/A
Email	Client E-mail Information	Lists detailed client e-mail information	Report displays Client ID, Last Name, First Name, E-Mail Address, Number of E-Mail Reminders and Number of Records	N/A
Equimlab	Equine Owners List	Lists all active clients who have 100% ownership of an active Equine patient. Output is suitable for exporting into mailing labels. May also be modified to target any specified breed/species	Report displays First Name, Last Name, Address, City, State, Postal Code and Number of Records	N/A
Fel_0rem	Felines Missing Reminders Report	Lists all active felines missing reminders in their patient record	Report displays Patient ID, Name (of Patient), Breed ID, Birth Date, Client ID, and Number of Records	No value to enter. (The nested search is excluding all patients who have reminders listed within Cornerstone.)
Fel_crab	Felines with Canine Rabies Reminders Report	Lists all active felines with reminders for canine rabies	Report displays Patient ID, Name (of Patient), Client ID, Invoice Item ID, Transaction Date, and Number of Records	N/A

File Name	Title	Description	Report Display	Nested Values
Fel_spay	Female Felines Needing Spayed Report	Lists all active feline females over six months old, not of a specified classification, that needs to be spayed (Can modify for males needing neutering.)	Report displays Patient ID, Name (of Patient), Client ID, Breed ID, and Number of Records	Value 1 → Invoice Item ID Value 2 → Invoice Item ID Value 3 → Invoice Item ID Value 4 → Invoice Item ID (List items that should be excluded from the search criteria. In this instance, the exclusion includes Feline Spay services. The nested search will exclude all patients who have been invoiced for the service(s) listed.)
Find_zip	Clients in Zip Code List	Lists all active clients within a specified zip/postal code (target market group) without a credit code of Cash Only	Report displays First Name, Last Name, Address, City, State, Postal Code and Number of Records	N/A
Findsale	Single Item Sales History Report	Lists all patients who were invoiced for a specified item within a date range. Useful for product recalls or following up after a specific treatment	Report displays Patient ID, Name (of Patient), Status 1=Active, Client ID, Quantity, Sum (Quantity) and Number of Records	N/A
Hazmatl	Hazardous Materials Report	Lists all invoice items designated as Hazardous in Invoice Item Information	Report displays Item ID, Description (of Item), Item Type, MSDS 1=Yes, and Number of Records	N/A
LabResults	Lab Results Report	Lists patients who have specific lab results within a specified date range	Report displays the Client ID Patient ID, (Patient) Birth Date, Test Name, Test Value, Date/Time Run and Number of Records	N/A
No_bday	Canines/Felines Missing Birthdays Report	All active canine and feline patients missing a birth date in their patient file	Report displays Patient ID, Patient Name, Species ID, Client ID, and Number of Records	No value to enter. (The nested search is excluding all patients who have birth dates listed within Cornerstone.)
No_dentl	Canines/Felines Missing Dental Report	Lists all active canines and felines over 6 months old who have not been invoiced for a dental exam	Report displays Patient ID, Patient Name, Species ID, Client ID, and Number of Records	Value 1 → Invoice Item ID (List the item that should be excluded from the search criteria. In this instance, the exclusion includes a Dental Examination service. The nested search will exclude all patients who have been invoiced for the service listed.)

File Name	Title	Description	Report Display	Nested Values
No_geri	Canines/Felines Missing Geriatric Exam Report	Lists all active canine and feline patients over seven years old missing a geriatric exam (If the practice doesn't offer a geriatric exam, use an ID for a regular or comprehensive exam.)	Report displays Birth Date, Species ID, Patient ID, Patient Name, Client ID and Number of Records	Value 1 → Invoice Item ID (List the item that should be excluded from the search criteria. In this instance, the exclusion includes a Comprehensive Examination service. The nested search will exclude all patients who have been invoiced for the service listed.)
No_itemx	Patients Invoiced for Item but not Item X Report	Lists all active patients invoiced for a specific invoice item (like a Dental Exam) but missing a related service or product (like t/d diet). Modify this report to detail Farm Call without Mileage, Surgery without a Recheck exam, and so on	Report displays Patient ID, Name (of Patient), Species ID, Client ID, Invoice ID, Transaction Date, and Number of Records	Value 1 → Invoice Item ID Value 2 → Invoice Item ID Value 3 → Invoice Item ID (List the possible missing related services or inventory items)
No_msds	Hazardous Materials Missing MSDS Report	Lists all items designated as Hazardous material but do not have the MSDS check box selected in Invoice Item Information	Report displays Item ID, Description (of Item), Item Type, and Number of Records	N/A
No_phone	Client Missing a Phone Number Report	Lists all active clients without a phone number in their client record	Report displays Client ID, First Name, Last Name, Balance, and Number of Records	No value to enter. (The nested search is excluding all clients who have a phone number listed within Cornerstone.)
No_wgt	Canines/Felines Missing Weight Report	Lists active canines and felines without a weight in their patient file	Report displays Patient ID, Patient Name, Species ID, Client ID, and Number of Records	No value to enter. (The nested search is excluding all patients who have a weight listed within Cornerstone.)
Noorder	Vendors Not Ordered From Report	Lists all active vendors the practice has not placed an order with within a specified period	Report displays Vendor ID, Vendor Name, Contact, Phone Number, Account Number and Number of Records	Value 1 → 'From' Order Date (yyyy/mm/dd) Value 2 → 'To' Order Date (yyyy/mm/dd) (The nested search lists the order date ranges (value 1 through value 2) that will be excluded from the report.)

File Name	Title	Description	Report Display	Nested Values
Nosched	Unscheduled Staff Report	Lists all doctors who have not had any appointments scheduled for a specified period within the Appointment Scheduler	Report displays Staff ID, First Name, Last Name, License Number and Number of Records	Value 1 → 'Up to' Appointment Date Value 2 → 'From' Appointment Date Value 3 → Appointment Type (A = Appointment, B = Block, L = Lunch, O = Other) (The nested search is excluding all appointments scheduled within a certain date range of Value 2 through Value 1.)
Not_dead	Patients Not Marked as Deceased Report	Lists all patients who were invoiced for a specific special action service (like euthanasia) but whose patient status is not marked deceased	Report displays Patient ID, Name (of Patient), Patient Status and Number of Records	N/A
Notrack	Items Ordered but Not Tracked Report	Lists all items that have been ordered, but whose quantity on hand is not currently being tracked	Report displays Item ID, Hospital Description, Item Type, Class Description, Location, and Number of Records	No value to enter. (The nested search is including all invoice items that have been ordered within Cornerstone Inventory.)
Numvisit	Number of Visits (Per Client)	Lists the number of visits per client since a specified date range	Report displays Client ID, Total Number of Visits-(SUM), Sum, and Number of Records	N/A
Numvisit2	Number of Visits (Per Client)	Lists the number of visits per client between a specified date range	Report displays Client ID, Total Number of Visits-(SUM), Sum, and Number of Records	N/A
Pnt_chip	Patient Microchip Report	Lists patients with microchip IDs	Report displays Microchip ID, Name (of Patient), Last Name, First Name, Phone, Location (of Phone), and Number of Records	N/A
Pt2inact	Patients Which Need to be Inactivated	Lists patients who need to be inactivated because their owners are inactive	Report displays Patient ID, Name (of Patient), Client ID, First Name, Last Name, and Number of Records	N/A
Rabietag	Rabies Tags	Lists patients and their rabies tag numbers, along with the clients and their phone numbers	Report displays Tag Number, Name (of Patient), Last Name, First Name, Phone, Location (of Phone Number) and Number of Records	N/A
Refund	Refund Report	Lists all clients with refunds within a specified date range	Report displays Client ID, First Name, Last Name, Invoice ID, Amount, Sum, and Number of Records	N/A

File Name	Title	Description	Report Display	Nested Values
Reinstat	Clients Reinstated Report	Lists all clients who were written off and then reinstated	Report displays Transaction Date, Client ID, First Name, Last Name, Description, and Number of Records	N/A
Rem_cnt	Reminders Count Tally	Provides a count of all reminders within a specified date range. (You can use this tally to calculate a rate of return on reminders.)	N/A	N/A
Senpatnt	Clients Owning Senior Patients	Lists all active clients who own senior patients	Report displays (Client Full) Name, Address, City, Postal Cost, State, and Number of Records	Value 1 → Invoice Item ID Value 2 → Invoice Item ID Value 3 → Transaction Date (The nested search is excluding all patients who have been invoiced for certain services since a specified date.)
Sls_rng	Sales Range Report	Lists all clients with an invoice sale over a specified amount within a specified date range	Report displays Client ID, First Name, Last Name, Amount, Invoice Item ID, Average (Amount), Sum (Amount), and Number of Records	N/A
Svc_chg	Service Charge Exception Report	Lists all clients who didn't receive a service charge on returned checks or who received a charge less than the standard amount	Report displays Client ID, First Name, Last Name, Service Charge, Average (Service Charge), Sum (Service Charge), and Number of Records	N/A

File Name	Title	Description	Report Display	Nested Values
Template	Template Report (Sample)	This report can be used to easily design a customized list of patients who have received certain services within a specified date period	Report displays Patient ID, Name (of Patient), Client ID, First Name, Last Name, and Number of Records	Nested Report 1: Value 1 → 'From' Transaction Date (yyyy/mm/dd) Value 2 → 'To' Transaction Date (yyyy/mm/dd) Value 3 → Invoice Item ID Value 4 → Invoice Item ID Value 5 → Invoice Item ID Value 6 → Invoice Item ID Value 7 → Invoice Item ID Value 8 → Invoice Item ID Value 9 → Invoice Item ID Value 10 → Invoice Item ID (The nested search includes a list of invoice items that were received within a specific transaction date range of Value 1 through Value 2.) Nested Report 2: Value 1 → 'From' Birth Date Value 2 → 'To' Birth Date (The nested search includes a list of patients with birth dates listed between Value 1 through Value 2.)
Totalinv	Client Invoice Totals	Shows clients who have spent over a specified total during specified date range	Report displays Client ID, First Name, Last Name, Address, City, State, Postal Cost, Invoice Totals – (SUM), Sum, and Number of Records	N/A
Who_adj	Adjustment Staff Exception Report	Lists all adjustments made by someone other than the specified doctor, staff member, or office manager (It is also possible to add a date range, if desired.)	Report displays Amount, Client ID, First Name, Last Name, Staff ID, Transaction Date, Average, Sum, and Number of Records	N/A

Sample Query Details Form

Practice Explorer Query File Name: ________________ ☐ Report ☐ Tally

Description: ____

____

SELECTION

(	Category	Field	Operator	Value	And/Or	)

OUTPUT **Report Title: ______________________________________**

Category	Field	Order	Heading	Sort	Avg.	Total

❒ Omit Duplicates

Nested Report SELECTION

(	Category	Field	Operator	Value	And/Or	)

Nested Report OUTPUT

Category	Field	Order	Heading	Sort	Avg.	Total

Glossary of Terms

Database

A collection of tables where your practice's data is stored

Category

Practice Explorer's name for database tables

Nested report

A query inside another query that narrows the selection of data; also used to find information that does not exist in selected records

Null

A column that does not have a value for a record

Operators

Symbols which determine which values to select

Query

The selection of information from the database

Report

A type of query which exports information in the form of a report, which can be previewed, printed or exported to a file

SQL

Stands for Structured Query Language, which is a standard programming language for databases

Table

The way information is stored in the database

Tally

A type of query which counts the number of records which meet the selected criteria

Update

A type of query which allows you to find and replace specific information

Support: 800-695-2877
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IDEXX LABORATORIES

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