Boarding and grooming

The boarding and grooming features in the Cornerstone* Software let you schedule, check in, and check out boarding pets independently of your hospital patients. While booking a reservation, you can add invoice items, set up special instructions for care and feeding, and schedule a grooming appointment.
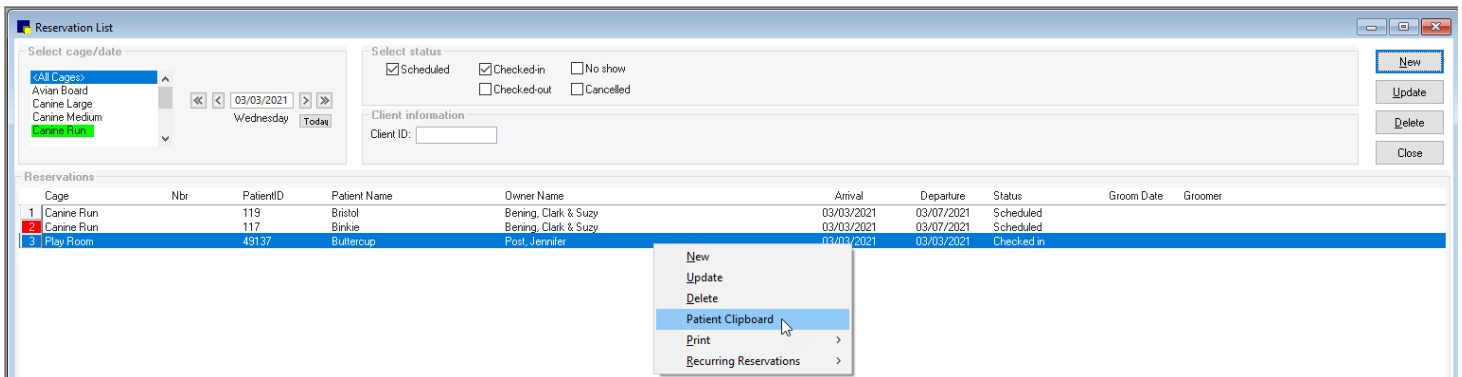
Using the Reservation List

To open the Reservation List:

- Menu—On the **Activities** menu, select **Boarding>Reservation List**.
- Toolbar—Click the **Reservation List** button 🏠.

To use the Reservation List:

- Review reservations by cage type and status and to create, update, or delete a reservation.
- From the right-click menu, you can access the Patient Clipboard*, print a check-in report, a cage card, or other documents, schedule recurring reservations, and view a boarding and grooming Census List.
- If cages are booked for the selected date, the cage type is highlighted in green. A longer green bar indicates more bookings for that cage type.
- If the cage type is overbooked, a red square shows the number of overbooks.

Scheduling a single pet reservation

1. On the Reservation List, click **New**, or right-click the patient from the Patient Clipboard and select **Reservation**. The Reservation Information window opens.

2. In the **Client ID** box, type the ID or press **F2** to search for the client. Client information is displayed and patients belonging to the client appear in the Patient area.

3. In the **Reservation #** box, press **Tab** to assign a reservation number. If the client has existing reservations, a message asks if you want to make a new reservation. **Tip:** Click in the **Reservation # box** and press **F2** to view the client's reservation history.

4. From the **Reservation type** drop-down list, select the type of reservation.

5. Enter the arrival and departure dates and times. For a new reservation, press **Tab** to skip the Confirmed box. To confirm a reservation, enter the information or click **Confirm**.

6. In the **Made by** box, type the ID or press **F2** to search for a staff member.

7. In the **Patient** area, select the pet to add to the reservation (press **F2** to search if necessary).

8. Select the **Include on reservation** checkbox.
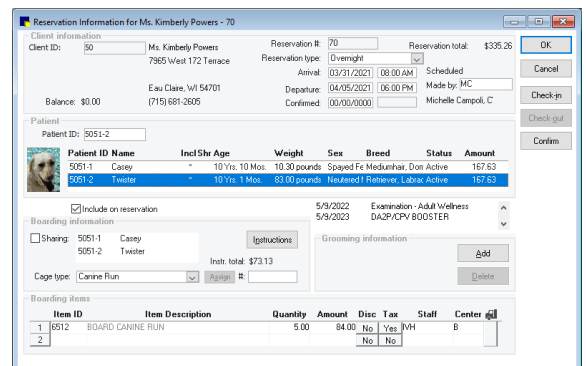
9. From the **Cage type** drop-down list, select the type of cage.

10. (Optional) Click **Assign** to assign the first available cage, or press **F2** in the **Assign #** box to pick a cage. **Note:** You can assign cages only if the **Assign Cage Numbers** default setting is on (**Controls>Defaults>Practice and Workstation>Boarding**).

11. Click the **Instructions** button, and then add notes, feeding instructions, and any other information.

12. To add a grooming appointment, in the Grooming information area, click **Add** and complete the information.

13. In the Boarding items area, enter the reservation charges. In each line, enter an item ID or press **F2** to select the ID and then enter the required information.

14. Click **OK** to save the reservation.

Other reservation actions

To…	Do this…
Schedule a reservation for multiple pets with separate cages	Follow steps 1–6 for scheduling a single pet reservation. Select the first pet to add, select the **Include on reservation** checkbox, and complete steps 7–13. Repeat for each pet. If any pets will be sharing a cage, see the next item. Click **OK**.
Schedule a reservation for multiple pets sharing a cage	Follow the steps above for adding all the pets to the reservation. Select the primary pet, verify the cage type to be shared, and then select the **Sharing** checkbox. In the **Sharing** box, select each pet that will share the cage with the primary pet.
Schedule a recurring reservation	On the Reservation List window, right-click a reservation and select **Recurring Reservations** and the recurrence period (Daily, Weekly, Monthly, or Yearly). **Note:** The length of the reservation is based on the original reservation and cannot be modified.
Delete a reservation	On the Reservation List window, select the reservation and click **Delete**.
Block cages	To block reservations from being made for a cage, go to **Activities>Boarding>Block Cages**. Click **New** and enter the required information. You can also update or delete blocked cages. **Note:** You can block cages only if the **Assign Cage Numbers** setting is on (**Controls>Defaults>Practice and Workstation>Boarding**).
Check-in a reservation	Select the reservation and click **Update**. Click **Check-in**. If you have any documents linked to your boarding reservation types, they will be automatically generated. Follow the prompts to complete any needed information, and then click **OK** to print.

Keyboard shortcuts

F1	Display on-screen Help for the current window.
F2	Look up values for a list, such as ID fields.
Tab	Move the cursor to the next field.
Shift+Tab	Move the cursor to the previous field.
Ctrl+D	Delete the selected record.
Ctrl+C/Ctrl+V	Copy and paste the selected item.
Ctrl+Enter	Move the cursor to the next line in note areas.

Right-click menus

In the Reservation List, right-click a reservation to create, update, or delete a reservation, reprint a Check-in Report, and print other documents.

Tips:

- Double-click in an ID field to search for an item.
- Double-click a reservation to open the Reservation Information window.
- Double-click in a date box to open a calendar.

For more information

For setup information and detailed instructions, see the "Boarding and Grooming" section of the Cornerstone Help ❓.

Go to idexxlearningcenter.com to view snippet videos about Boarding and Grooming.

Find this document at **idexx.com/cornerstonehelp**.

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