Check-in and Census List

When you check in a patient, the Cornerstone* Software adds the patient to the Census List and lets you view basic client and patient information and add notes and alerts.

Open the Patient Check-in/out window

You can access the Patient Check-in/out window any of these ways:

- Patient Clipboard*—With the client's account open, right-click the patient in the Patient list area and select Check-in.
- Appointment Scheduler—On the Schedule for Today window, right-click the appointment and select Check-in.
- Client/patient search—Right-click a patient card and select Check In.
- Census List—Press F3 or go to Lists>Census to open the Census List. Select the patient from the Scheduled Appointments view and click Check-in.
- Toolbar—Click the Check-in/out button

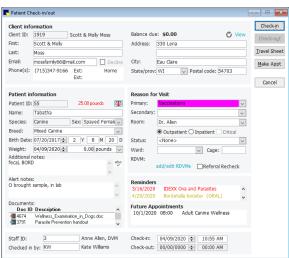
Check in a patient

Depending on how you access the window, some information may already be displayed.

- Open the Patient Check-in/out window (see above), and in the Client ID and the Patient ID boxes, type the IDs or press F2 to search. You can modify client and patient information as needed.
- 2. In the **Additional notes** box, type any notes to be printed on the Check-in Report and saved to the patient record.
- 3. In the Alert notes box, type an alert for this visit only. The alert is displayed on the Electronic Whiteboard and the Checked-in tab of the Daily Planner for the current visit only. Once the patient is checked out, the most recent alert information is available with a document patient bookmark.
- 4. In the **Documents** area, specify documents to be printed upon check-in (besides the Check-in Report) or check-out.
- 5. Under Reason for Visit:
 - a. Select a reason from the **Primary** drop-down list. You can also add a secondary reason.
 - b. From the **Room** drop-down list, select the room where the patient will be seen.
 - c. Select **Outpatient** or **Inpatient**. Inpatients are automatically added to the Electronic Whiteboard. If an inpatient is critical, select the **Critical** checkbox to display the critical icon on the Check-in/out window, the Census List, and the Electronic Whiteboard window.
 - d. From the **Status** drop-down list, select an appointment status. **Note:** This status appears on the Daily Planner checked-in and PVL tabs, as well as on the Census List Patients in Hospital view.
 - e. If applicable, include the ward and cage information.
 - f. As needed, click the **add/edit RDVMs** link to update RDVM information. Select **Referral Recheck** to separate new vs. recheck referral visits. **Note:** this checkbox may already be selected, based on the primary Reason for Visit.
- 6. View reminders and upcoming appointments in the corresponding fields.
- 7. Verify that the **Staff ID** box displays the staff member seeing the patient. If it does not, type the ID (or press **F2** to search). In the **Checked in by** box, a staff ID may appear by default and/or be required.

Update check-in information

Open the Patient Check-in/out window (see above) and click Update.



Use the Census List or Daily Planner

To view the Census List: Press F3.

 Use the Census List to see a list of checked-in patients, assigned staff members, rooms, reasons for visit, hospital statuses, and how many patients have checked in/out for the day.

To view the Daily Planner: Click and then click the Checked-In tab.

- Select View for all staff to see all checked-in patients.
- The Checked-In tab displays a list of checked-in patients and client/patient/staff/visit details, including hospital status.
- To see appointment and check-in alert notes, hover the mouse pointer over the icons on the right.

Tip: The Daily Planner can be set to

Check-in View Patients In Hospital ~ Checked in today: 2 <u>U</u>pdate Suite: Doctor/Technicia Checked out today: 0 Outpatients Check-out Room: All Rooms in Suite Scheduled: 0 Total patients Patient Name Patient ID Breed Practice-Room-Cag Close Client Name Client ID Ward <u>R</u>efresh Bening, Clark & Suzy 1940 Female Spayed 136 Kilev Chihuahua, Smooth-coated Brighton, Betty ₩ TX 1946 Female Maniac(I) Johns, Keith 1002 Parker, J.C. ₩, 1934

Census List

Staff information -									
	helle Campoli, CVT, CVPM		☑View for all staff						Close
Appointments	Call Backs	Diagnostics	Checked-In	Medical Notes	Correspondence	Patient Visit List	Invoices	Exams	Refresh
Client ID	Client Name		Patient ID	Patient Name	e	Check-in Date/Time			
	Reason for Visit		Room	Status		Staff Name			
7000	Lingham, Beverly		TP4	Krystal		3/29/2021 10:57 AM		Ef A	
	Dental		Dr. Jones	In Recovery		Fred Jones, DVM			
TEST	Testarosa, Carl		TP2	Test Kitty		3/29/2021 04:08 PM			
	Dental			Ready to go	home	Fred Jones, DVM			
8011	McGilligan, Lab 11		8048	Jack		3/38/2021 12:26 PM		E#	
	Admit			Ready to go	home	Fred Jones, DVM		_	
7013	Coleman, Elaine		7025	Kitho		3/30/2021 09:54 AM		*	
	Admit , Chk Eyes			Waiting		Anne Allen, DVM			
6010	Silver, Lany		6037	Murphy		3/30/2021 03:55 PM		Ef A	
	Exam - Medical			Walting		John Kingley, DVM			ments: IM Consult > chronic V/D. D bringin
15130	Post, Jennifer		49137	Buttercup		3/29/2021 02:43 PM		recon	ds

Daily Planner

open at login under: Controls>Defaults>Staff>Miscellaneous.

То	Do this in Census List	Or do this in Daily Planner		
Refresh the list	Click the Refresh button.	Click the Refresh button.		
Change the view	Use the View and Sort by drop-down lists to display and sort the patient list. You can also view by staff, suite, and room. Tip: For Multi-Location/Single-Database practices, the Census List will also have a Practice drop-down list.	Click the appropriate column header to sort by ascending/descending values; click again to reverse. You can also change the Staff ID or select View for all staff .		
Check out	Select the appointment and click Check-out ; then click Yes . You must manually remove an inpatient from the Electronic Whiteboard or check the patient out through invoicing.	Double-click or right-click and then select Update .		

Keyboard shortcuts

F1	Display on-screen Help for the current window.	
F2	Look up values for a list, such as ID fields.	
F3	Open the Census List.	
Tab	Move the cursor to the next field.	
Shift+Tab	Move the cursor to the previous field.	
Ctrl+U	Update the selected record.	
Ctrl+Enter	Move the cursor to the next line in note areas.	

Right-click menus

Use right-click menus for quick access to the Patient Clipboard on the Daily Planner.

For more information

For Patient Check-in/out and Census List setup and detailed instructions, see the Cornerstone Help?. Go to idexxlearningcenter.com to view snippet videos about many other Cornerstone features.



