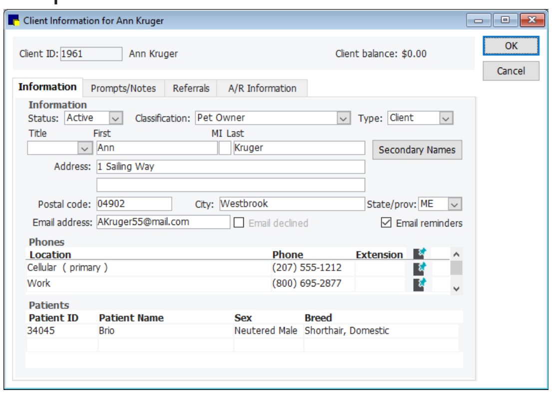
Reception

Add or update a client record

1. On the Cornerstone* Patient Clipboard*, do one of the following:
   - For a new client—right-click in the **Client ID** field (top left corner) and select **New**; press **Tab** to accept the ID (or type an ID).
   - For an existing client—with the client selected on the Patient Clipboard, right-click in the **Client ID** field and select **Update**.



2. On the Information tab, enter or update name and contact information; right-click in the **Phones** area and select **New** or **Update**.
3. Enter information as needed on the **Prompts/Notes**, **Referrals**, and **A/R Information** tabs. Some information may be optional or required based on practice settings.
4. To add or update a patient for this client, right-click in the Patients area and select **New** or right-click an existing patient and select **Update**.
5. Click **OK** to save the record.

Check in a Patient

- **Patient Clipboard**: in the Patient list area, right-click the patient name and select **Check-In**.
- **Schedule for Today window**: right-click the appointment and select **Check-in**.

When you check in a patient:

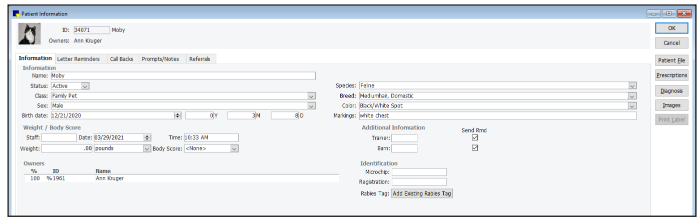
- You can print a Check-In Report and other needed documents.
- The patient is added to both the Checked-In tab on the Daily Planner and the Census List (F3), which display visit and status information about patients currently being seen at the practice.

Tips for using the Patient Check-in/out window:

- You can record weights taken in the reception area in the Patient Check-in/out window.
- Select **Inpatient** to add the patient to the Electronic Whiteboard.
- You can update the patient's hospital status at any time.

Add or update a patient record

1. With the client selected on the Patient Clipboard, in the Patient list area, right-click and select **New**, or right-click a patient name and select **Update**.



2. For a new patient, press **Tab** to accept the ID (or type an ID).
3. On the **Information** tab, enter or update information in the patient record. Sex, Species, and Breed are required fields. Other fields may be required by your practice.
4. The Weight / Body Score area options differ, depending on whether you are adding a new patient or updating an existing patient:
   - For a new patient: Enter your staff ID and the patient's weight. You can also enter a body score, if this vital sign has been activated for your practice.
   - For an existing patient: Click the **Vital Signs/Weight** button to display the Vital Signs window. You can enter a current weight and add other vital sign entries as appropriate.

   Note: If the button is red/yellow, it means at least one vital sign (other than weight and body score) has not been entered for the patient within the past 10 days.
5. To add or update patient owner information, right-click in the **Owners** area and select **New**, or right-click an existing owner and select **Update**.
6. To document a new patient's rabies tag if it was issued elsewhere, click the **Add Existing Rabies Tag** button.
7. (Optional) To add a pet picture, right-click in the field in the upper left corner and select **Capture>File**.
8. Enter information as needed on the **Letter Reminders**, **Call Backs**, **Prompts/Notes**, and **Referrals** tabs. Some information may be required based on practice settings.
9. Click **OK** to save the record.

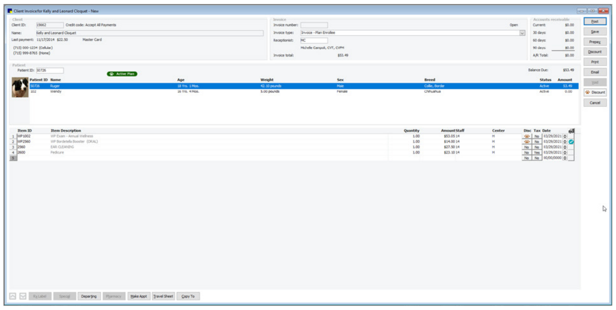
Issue a rabies/vaccine tag

1. To issue a new rabies/vaccine tag, add a vaccine item (set up with the Vaccine Tag special action) to the Patient Visit List (PVL) or invoice.
2. Enter tag information in the Vaccine Tag window and print a rabies certificate, if applicable.

Additional tag functions are available from the right-click menu of the Tags/Microchip ID tab of the Patient Clipboard (security access required).

Process an invoice

1. Select a client or patient on the Patient Clipboard; right-click in the **Client ID** or **Patient list** area and select **Invoice**.
2. In the **Invoice number** field, press **Tab** to start a new invoice. To start a second invoice while another invoice is open, press **Ctrl+N**. To reprint an invoice, press **F2** and select the invoice.



3. Select the invoice type (may or may not be required).
4. In the **Receptionist** field, type the staff ID or press **F2** to search for and select a staff member.
5. If the patient is not already selected, choose the patient to include on the invoice.
6. In the **Item ID** column, type the item ID of the first product or service (or press **F2** to search for and select the item).
7. If necessary, change the **Quantity**, **Amount**, **Staff ID**, **Revenue Center**, **Discount(s) or Tax(es) applied**, or the **Date** fields.
8. Continue adding additional invoice items. To add items for another patient, select the name from the patient list or press **F2** or double-click in the **Patient ID** field.
9. To remove an item, highlight the item ID and press **Ctrl+D**. To delete an item that is part of a group, click on the quantity and press **Ctrl+D**.
10. Click **Post**. If there are any not-requested diagnostics or unprocessed special actions, a dialog box opens.

    For not requested results:
    - Click **Yes** to resolve billing.
    - Click **No** to continue posting or saving the invoice.
    - Click **Cancel** to return to the invoice.

    For the special actions:
    - Click **Process** to perform the highlighted special action.
    - Click **Continue** to continue posting or saving.
    - Click **Close** to return to the invoice.
11. At the Post Invoice window, make any needed changes and click **OK**. (Remember: After an invoice is posted, it cannot be changed.)
12. If your practice uses cashier passwords, in the Payment dialog box, enter your cashier password and press **Tab**.
13. In the **Amount** column, enter the payment amount using decimal points, or right-click and select **Invoice Balance** and then press **Tab**.
14. Select the payment type. If prompted for more information, enter the information in the **Answer** column.
15. Verify that the amount and the balance after payment are correct, and then click **Post**.

Transfer Patient Visit List items to an invoice

The Patient Visit List (PVL) stores products and services for a patient. You can transfer items from the PVL to the invoice either from the PVL or from the client invoice (with the cursor in the item ID field).

From the invoice:

1. On the Client Invoice window, click **Yes** or **Process** on the PVL message.
2. Select the items you want to transfer (or verify that the correct items will be transferred), and then click **Transfer**.
3. Repeat as needed for additional pets, and then click **Post**.

From the PVL:

1. Open the PVL for the patient from Patient Clipboard or the PVL tab of the Daily Planner.
2. Verify the items to be transferred to the invoice; click **Invoice**.
3. If the client has other patients, select the patients from the list and enter charges or follow prompts to transfer their PVL items.
4. Click **Post**.

Correct an invoice or process a return

1. With the client selected on the Patient Clipboard, right-click in the **Client ID** area and select **Invoice**.
2. In the **Invoice number** field, press **Tab** to start a new invoice. To start a second invoice, press **Ctrl+N**.
3. In the **Item ID** column, type the ID of the item that is being returned or that was incorrectly entered (or press **F2** to select from a list).
4. In the **Quantity** column, enter a negative quantity (-1).
5. Repeat as needed for additional items.
6. Associate the return(s) with the same staff ID and Revenue Center as the original invoice.
7. To apply a credit, right-click in the amount field and select **Invoice Balance,** or enter a negative payment on the Payment window.
8. Select the payment type and verify that the change given and the balance due fields are correct, and then click **Post**.
   Note: If a client prefers to apply the credit to future products or services, post the corrected invoice without a payment.

Apply a payment to a client account

1. Select the client on the Patient Clipboard, and then click the **Account Information** $ tab in the Client Information area.
2. Right-click in the **Transaction Description** area of the tab and select **Payment**.
3. If your practice uses cashier passwords, enter your password.
4. In the **Amount** column, enter the payment amount using decimal points; if the client is paying the balance, right-click and select **Client Balance**.
5. Select the payment type and answer any questions in the **Answer** field.
6. Ensure the payment amount, change given, and balance after payments are correct, and then click **Post**.