Medical Task Summary

Create an estimate

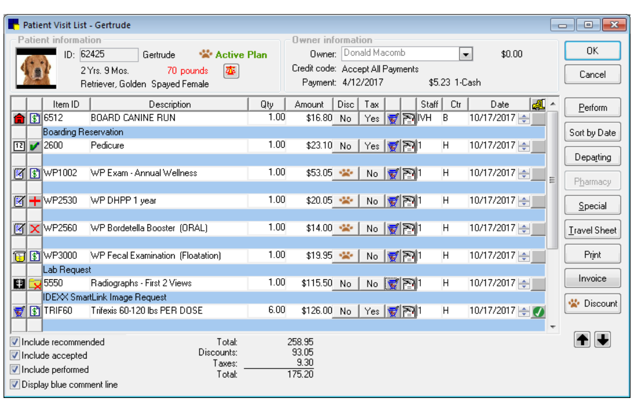
1. Select the client and patient on the Patient Clipboard*; in the Patient list area, right-click the patient name and select **Estimate**.
2. With the cursor in the **Estimate #** field, press Tab.
3. Type an estimate description and press Tab.
4. In the Item ID column, type the item ID of the first product or service (or press F2 to select the item).
5. Verify the quantities, staff ID, revenue center, and date, and enter any additional invoice items.
6. Click **OK**. The Save Estimate dialog box appears.
7. Do one of the following:
   - If you use electronic signatures: Select the **Preview/ Signature** option and click **OK**. See the *Estimates* quick guide or Cornerstone Help for more information.
   - If you do not use electronic signatures: Select the **Save and continue** option, specify your preferences for printing, emailing, saving, and/or finalizing, and then click **OK**.

Use the Patient Visit List

The Patient Visit List stores products and services for a patient. When you start an invoice, you can transfer the items from the Patient Visit List. Access the Patient Visit List any of these ways:

- Select the client and patient on the Patient Clipboard; in the Patient list area, right-click the patient name and select **Patient Visit List**.
- Click the **Patient Visit List** toolbar button .
- While adding a medical note in the Cornerstone Editor, click the **Open PVL** button near the bottom of the window.
- While on the Daily Planner, click the **Patient Visit List** tab, right-click on the patient name, and select **Update**.

Use the blue lines for temporary notes or internal communication on any item not declined to history. On items declined to history, any notes on the blue lines will be saved in patient history.



How are items added to the Patient Visit List?

Items are transferred to the Patient Visit List with a status of recommended or performed (based on activity) whenever they are added from:

- A lab or imaging request
- A finalized estimate
- Electronic Whiteboard completed treatments
- Documents (medical notes or correspondence)
- Prescriptions
- Appointments that are checked in
- A boarding and grooming reservation (upon checkout)
- A Patient Advisor exam

Patient Visit List status buttons

Change the status of an item by clicking a status button or by right-clicking and selecting the item status from the popup menu.

= recommended by your practice

= accepted by the owner

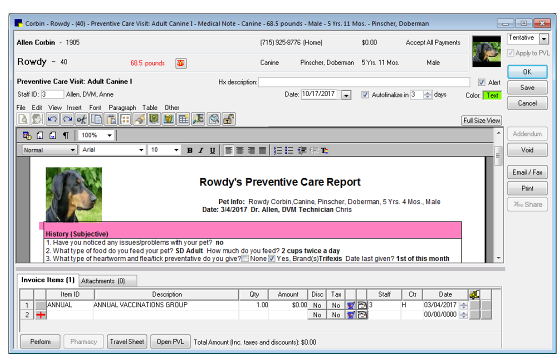
= performed by your staff

= declined by the owner and **will not** appear in patient history

= declined by the owner and **will** appear in patient history

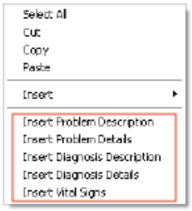
Start a Medical Note for a patient

1. Select the client and patient on the Patient Clipboard; in the Patient list area, right-click the patient name and select **Medical Note**. The Start New Document window appears.
2. If a default staff person has not been designated in Patient defaults, enter the staff ID and press Tab.



3. Select the template and click **OK,** or double-click the template.
4. If the patient weight is not current (based on the **Ask for weight…** setting in Documents defaults), a weight entry dialog box opens; update the patient weight.
5. Complete the medical note information.
6. Select a status (Draft, Tentative, or Final) from the drop-down box in the upper-right corner of the window, and click **OK**. Refer to the *Medical Notes* quick guide or Cornerstone Help for more information.

Insert problem, diagnosis, or vital signs information within a medical note

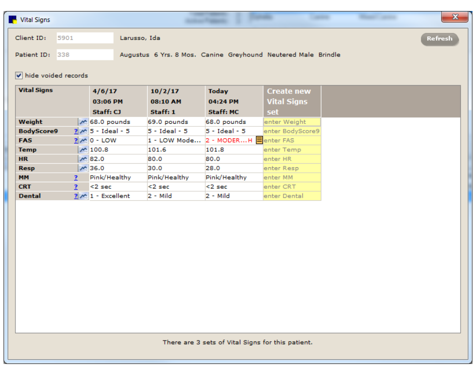


1. Create or open the medical note.
2. Click the links within the document for problem, diagnosis, or vital sign entry. If the links do not appear, right-click and select the desired option from the menu.
3. To insert a problem: On the Problems dialog box, in the Problem column, type the problem ID, or press F2 to select from a list. Specify the severity, state, and staff ID. Ensure the **Add to Document** check box is selected for each problem you want to insert, and click **OK**.
4. To insert a diagnosis: On the Patient Diagnosis dialog box, in the Code column, type the diagnostic code ID, or press F2 to select from a list. Change the date, status, and staff if needed. Ensure the **Add to Document** check box is selected for each diagnosis you want to insert, and click **OK**.
5. To insert vital signs information: In the Vital Signs column (left column), click the check box next to each vital sign to include in the document. In the date/time/staff column headers, select the check box for each vital signs set to include, and click **OK**.

Record vital signs for a patient

You can easily access the Vital Signs window by clicking the **Vital Signs/Weight** button located in many places in Cornerstone.

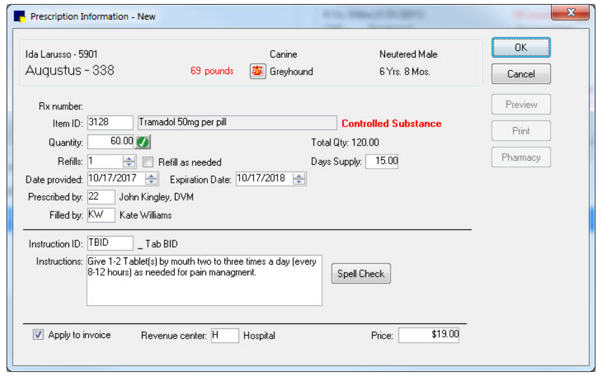
1. In the **Create new Vital Signs set** column (right column), double-click in any cell to display the vital sign fields.
2. Record vital signs as applicable for this patient:
   - Enter or select the appropriate value in the text box or drop-down list.
   - If needed, click the "?" link to view detailed descriptions.
   - If this is an abnormal entry, use the **Normal** drop-down list to mark this vital sign as High, Low, or Abnormal.
   - To add a comment (e.g., panting, in pain, scared, etc.), type in the **enter comment** text box.
3. When finished, click **OK**. A Staff Selection dialog box appears.
4. Enter the staff ID or select the staff from the list, and click **OK**.



Create a prescription

Prescriptions remain on the Patient Visit List until transferred to an invoice.

1. With the client and patient selected on the Patient Clipboard, in the Patient list area, right-click the patient name and select **Prescribe**. The Prescription Information dialog box appears.



2. In the **Item ID** field, type the item ID or press F2 to select a prescription item from the Invoice Item List.
3. Complete the prescription information fields.
4. Enter an instruction ID (if applicable) or type instructions in the text box. (**Note:** To start a new line, press Ctrl+Enter)

   Note: If the **Apply to invoice** check box is selected, the prescription will be placed on the Patient Visit List. From there it can be moved to an invoice. (Uncheck this option only if you do not want to bill the client for the prescription.)
5. Click **OK** to save the prescription in patient history.
6. Click **OK** to print a prescription label to the assigned printer (in **File > Printer Assignment > General Reports**).

Manually finalize a medical note

Note: You must have security access to finalize documents.

If a medical note is not set to automatically finalize after a specified number of days, you can manually finalize it as follows:

- **From the Daily Planner**—On the Medical Notes tab, right-click a tentative document and select **Finalize**. (Draft documents must be updated and saved as Tentative before they can be finalized using this method.)
- **From the Cornerstone Editor**—When adding or updating a document, select **Final** from the drop-down box in the top right corner and then save the document.

Note: You cannot edit a finalized medical note, but you can insert additional notes at the bottom. To do this, right-click on the finalized document on the Patient Clipboard Summary tab or Medical Notes tab and select **Addendum**.

For more information

For more information, see the Cornerstone Help.

Go to idexxlearningcenter.com to view snippet videos about many other Cornerstone features.

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