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.

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.

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.

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