

## Add or Update a Client Record

- On the Patient Clipboard\*, do one of the following:
  - For a new client – Right-click in the **Client ID** field (top left corner) and select **New**.
  - For an existing client – With the client selected on the Patient Clipboard, right-click in the **Client ID** field and select **Update**.

The Client Information window appears.

Patient ID	Patient Name	Sex	Breed
6692	Barksalot	Neutered Male	Retriever, Labrador Mix
15290	Casey	Spayed Female	Mediumhair, Domestic

- For a new client, press TAB to accept the ID generated by Cornerstone (or type the ID if not auto-generated).
- On the **Information** tab, enter or update basic name and contact information in the client record.
- To add or update client phone numbers, right-click in the **Phones** area and select **New** or **Update**.
- 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**.
- To prevent incomplete records, enter information as needed on the **Prompts/Notes**, **Referrals**, and **A/R Information** tabs.
- Click **OK** to save the record.

## Check In a Patient

To check in a patient, do one of the following:

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

When you check in a patient:

- Depending on your default, you may print a Check-In Report, which is useful for referring to the patient's history.
- The patient is added to the **Checked-In** tab on the Daily Planner, which displays information pertaining to the patients currently being seen at the practice.
- The patient is added to the Census List, which lists all clients and patients currently in your practice.

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

- If **Inpatient** is selected, the patient is automatically added to the Electronic Whiteboard.
- If the patient is weighed in the Reception area, you can record the weight immediately on the Patient Check-in/out window.

## Add or Update a Patient Record

- With the client selected on the Patient Clipboard, in the **Patient list** area, right-click and select **New** to add a new patient or right-click a patient name and select **Update** to update a patient's record.

- For a new patient, press TAB to accept the ID generated by Cornerstone (or type the ID if not auto-generated).
- On the **Information** tab, enter or update information in the patient record. Name, Sex, Breed, and Species are required fields. Other fields may be required by your practice.
- The **Weight / Body Score** area options that display differ depending on whether you are adding a new patient or updating information for an existing patient:
  - For a new patient – Enter your Staff ID and the patient's Weight in the fields provided. Optionally, 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 for the patient. Here you can enter a current weight and add other vital sign entries as appropriate for this patient.
- Note:** The button displays in red/yellow as an alert if at least one vital sign (other than weight and body score) has not been entered for the patient within the past 10 days.
- 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**.
- For a new patient, the **Add Existing Rabies Tag** button is available. Click this button to enter an existing tag into the system if the patient was issued a tag elsewhere and you want to document the tag information in their record.
- To prevent incomplete records, enter information as needed on the **Letter Reminders**, **Call Backs**, **Prompts/Notes**, and **Referrals** tabs.
- Click **OK** to save the record.

## Issue a Rabies/Vaccine Tag for a Patient

In Cornerstone 8.1 and above, to issue a new rabies/vaccine tag for a patient you must invoice an item that has been set up to initiate the **Vaccine Tag** special action. When this item is invoiced, the Vaccine Tag window appears, allowing you to enter information for the tag and print a rabies certificate, if applicable.

## Process an Invoice

1. With the client selected on the Patient Clipboard, right-click in the *Client* area and select **Invoice**. The Client Invoice window appears.

Client Invoice for Joe & Terri Farrell - New

Client: Client ID: 9174, Name: Joe & Terri Farrell, Credit code: Credit, Last payment: 4/23/2008 \$138.02, Cash

Invoice: Invoice number: [blank], Invoice type: <None>, Receptionist: M/W, Mark J. Fiala DVM, Invoice total: \$57.66

Accounts receivable: Current: \$0.00, 30 days: \$0.00, 60 days: \$0.00, 90 days: \$0.00, A/R Total: \$0.00

Balance Due: \$57.66

Patient ID	Name	Age	Weight	Sex	Breed	Status	Amount
9174	Danny	9 Yrs. 0 Mos.	70.00 pounds	Neuter	RETRIEVER, GG	Active	0.00
91746	Murphy	11 Yrs. 1 Mos.	83.60 pounds	Spay	RETRIEVER, GG	Active	57.66

Item ID	Item Description	Quantity	Amount	Staff	Center	Disc	Tax	Date
19892	C/D Canine Dry 40 lbs	1.00	\$53.89M/W	F	No	Yes	10/07/2009	
2				M/W	No	No	00/00/0000	

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 old invoice, press F2 to select the invoice.
3. Select the **Invoice type**.
4. In the **Receptionist** field, type the staff ID or press F2 to search for and select a staff member from the Staff List.
5. If there is more than one patient associated with this client, highlight the patient record to be charged.
6. In the **Item ID** column, type the item ID of the first product or service to add to the invoice (or press F2 to search for and select the item from the Invoice Item List).
7. If necessary, change the Quantity, Amount, Staff ID, Revenue Center, Discount(s) or Tax(es) applied, or the Date.
8. Enter any additional invoice items.
9. To remove an item from the invoice, 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**, then click **OK**. (Remember that after an invoice is posted, it cannot be changed.)
11. If you post an invoice and there are special actions linked to any of the invoice items, a dialog box displays the special actions:
  - Click **Process** to perform the highlighted special action.
  - Click **Continue** to continue posting or saving the invoice.
  - Click **Close** to return to the invoice.
12. On the Payment dialog box, if your practice uses cashier passwords, enter your cashier password, then press TAB.
13. In the **Amount** column, enter the payment amount using decimal points or right-click and select **Invoice Balance**, 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.
16. When you are ready to post the payment, click **Post**.

## Invoicing and the Patient Visit List

The Patient Visit List (PVL) stores products and services for a patient. If a patient has items stored on the PVL, the list may appear (depending on your Invoice defaults) when the cursor is in the Item ID field on the Client Invoice. If desired, you can transfer the PVL items to the invoice.

If the Patient Visit List does not automatically appear, you can open the PVL from the invoice using these steps:

1. On the Client Invoice window, click the **Special** button.
2. Select **Patient Visit**, then click **Process**.
3. Select the items you want to transfer to the invoice (or verify that the correct items will be transferred), then click **Transfer**.
4. Click **Continue** to continue posting or saving the invoice.


## Correct an Invoice

Use this method if a client has returned an item or if an incorrect item was entered on an invoice and it has been posted.

1. With the client selected on the Patient Clipboard, right-click in the *Client* area and select **Invoice**. The Client Invoice window appears.
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.
3. In the **Item ID** column, type the ID of the item that is being returned or that was incorrectly entered on the invoice (or press F2 to select the item from a list).
4. In the **Quantity** column, enter a negative quantity (-1).
5. Click **Post** to save your changes.

**Remember:** If a payment was accepted, enter a negative payment on the Payment window. (In some cases a client may decide to leave the payment on the account as payment for future products or services.)

## Apply a Payment to a Client Account

1. With the client selected on the Patient Clipboard, in the *Client information* area, click the **Account Information**  tab.
2. Right-click in the white area of the tab and select **Payment**.
3. If your practice uses cashier passwords, enter your cashier password.
4. In the **Amount** column, enter the payment amount using decimal points or if the client is paying off the account, right-click and select **Client Balance**.
5. Select the payment type and answer any prompts (questions) in the **Answer** field.
6. Make sure the payment amount, change given, and balance after payments are correct, then click **Post**.

**IDEXX**  
LABORATORIES

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