


The boarding and grooming features in the IDEXX Cornerstone* Practice Management System allow you to schedule boarding reservations and check reservations in and out independently of your clinic/hospital patients. While booking a reservation, you can add invoice items to bill for products and services provided during the patient's stay, set up special instructions for the care and feeding of the pet, and schedule a grooming appointment.

Use the Reservation List to quickly review reservations by cage type and status for a day, create a new reservation; update or delete an existing reservation, print a check-in report, print a cage card or other documents, and view a boarding and grooming Census List.

Note If cages are booked for the selected date, there will be a green color bar behind the cage type text in the list indicating the availability of bookings for the cage type. A longer color bar indicates more bookings for that cage type. If the cage type is overbooked, a red square at the end will show the number of overbooks.

	Cage	Nbr	Patient ID	Patient Name	Owner Name	Arrival	Departure	Status	Groom Date	Groomer
1	Canine Cage		9030-1	Maggie Mae	Struebing, Christopher	10/04/2012	10/05/2012	Checked in		
2	Feline Condo		15315	Zoe	Sinclair, Poppy	10/04/2012	10/05/2012	Checked in		

Open the Reservation List

- **Menu**—On the **Activities** menu, select **Boarding > Reservation List**.
- **Toolbar**—Click the **Reservation List** button .

Scheduling a single pet reservation

1. On the Reservation List, click **New**. The Reservation Information window opens.
2. In the **Client ID** box, type the ID or press F2 to search for the client. The client's information displays and patients belonging to the client will appear in the **Patient** area.
3. In the **Reservation #** box, press Tab to assign a reservation number. If the client has any reservations scheduled, a message box asks you if you want to make a new reservation.
Tip Click in the **Reservation #** box and press F2 to view the client's reservation history.
4. From the **Reservation** type drop-down list, select the type of reservation.
5. Enter the arrival and departure dates and times for the reservation. Press Tab to skip the **Confirmed** box for a new reservation. To confirm a reservation, enter the information or click **Confirm**.
6. In the **Made by** box, type the ID or press F2 to search for a staff member.
7. In the **Patient** area, select the pet to add to the reservation (press F2 to search if necessary).
8. Select the Include pet on reservation check box.
9. From the **Cage type** drop-down list, select the type of cage.
10. Click the **Assign** button to assign the first available cage to the pet or press F2 in the **Assign #** box to view the Reservation Book and pick a cage.
11. Click the **Instructions** button and add notes, feeding instructions, and any other information for the pet.
12. To add a grooming appointment, in the **Grooming information** area, click **Add** and complete the information for the appointment.

13. In the **Boarding items** area, enter charges for the reservation. In each line enter an item ID or press F2 to select the ID and enter the required information.
14. Click **OK** to save the reservation to the Reservation List.

Other reservation actions

To	Do this
Schedule a reservation for multiple pets with separate reservation check box and complete steps 7–13. Repeat for each pet. If any pets will be sharing a cage, see cages	Follow steps 1–6 for scheduling a single pet reservation. Select the first pet to add, select the Include on check box and complete steps 7–13. Repeat for each pet. If any pets will be sharing a cage, see the next item.
Schedule a reservation for multiple pets sharing a cage	Follow the steps above for adding all the pets to the reservation. Select the primary pet and then select the Sharing check box. In the Sharing box, select each pet that will share the cage with the primary pet.
Schedule a recurring reservation	On the Reservation List window, right-click a reservation and select Recurring Reservations and the recurrence (Daily, Weekly, Monthly, or Yearly).
Delete a reservation	On the Reservation List window, select the reservation you want to delete and click Delete .
Block cages	To block reservations from being made for a cage, go to Activities > Boarding > Block Cages . Click New and enter the required information. You can also update or delete blocked cages.
Check in a reservation	On the Reservation List window, select the reservation and click Update . Click Check-in . If a correspondence document window opens, follow the prompts to complete the information, and then click OK . If you have a correspondence document linked to your boarding invoice items, it will automatically generate and print.

KEYBOARD SHORTCUTS

F1	Display online Help for the current window.
F2	Look up values for a list, such as in ID fields.
Tab	Move the cursor to the next field.
Shift + Tab	Move the cursor to the previous field.
Ctrl + D	Delete the selected record.
Ctrl + U	Update the selected record.
Ctrl + C/Ctrl + V	Copy and paste the selected item.
Ctrl + Enter	Move cursor to the next line in note areas.

RIGHT-CLICK MENUS

On the Reservation List, right-click a reservation to make a new reservation, update the existing reservation, delete the reservation, reprint a Check-In Report, and print other documents.

Tips

Double-click in an ID box to search for an item.

Double-click a reservation to open the Reservation Information window.

Double-click in a date box to open a calendar.

FOR MORE INFORMATION

For Boarding and Grooming setup and detailed instructions, see the Boarding and Grooming section of the Cornerstone* Help. Go to idexxlearningcenter.com to view snippet videos about Boarding and Grooming.

