Check-in and Census List

When you check in a patient, the Cornerstone* Software adds the patient to the Census List and allows you to view basic client and patient information, as well as add notes and alerts.

Open the Patient Check-in/out window

You can access the Patient Check-in/out window as follows:

- **Patient Clipboard**—With the client’s account open in the Patient Clipboard, right-click the patient in the Patient list area and select Check-in.
- **Appointment Scheduler**—On the Schedule for Today window, right-click the appointment and select Check-in.
- **Client/patient search**—Right-click a patient card and select Check In.
- **Census List**—Press F3 or Lists > Open to open the Census List. Select the patient and click Check-in.
- **Toolbar**—Click the Check-in/out button .

Check in a patient

**Note:** Depending on how you access the window, some information may already be displayed.

1. Open the Patient Check-in/out window (see above).
2. In the Client ID and the Patient ID boxes, type the IDs or press F2 to search.
3. In the Additional notes box, type any notes to be printed on the Check-in Report.
4. In the Alert notes box, type an alert for this visit only. For inpatients, the alert is displayed on the Electronic Whiteboard. This alert is not part of the patient history and will be deleted when the patient is checked out.
5. In the Documents area, specify documents to be printed upon check-in (besides the Check-in Report) or check-out.
6. Under Reason for Visit:
   a. Select a reason from the Primary drop-down list. You can also add a secondary reason.
   b. From the Room drop-down list, select the room where the patient will be seen.
   c. Select Outpatient or Inpatient. Inpatients are automatically added to the Electronic Whiteboard. If an inpatient is critical, select the Critical check box to display the critical icon on the Check-in/out window, the Census List, and the Electronic Whiteboard window.
   d. From the Status drop-down list, select an appointment status.
   e. If applicable, include the ward and cage information.
   f. As needed, click the add/edit RDVMs link to update RDVM information. Select the Referral Recheck to separate new vs. recheck referral visits.
7. View reminders and upcoming appointments in the corresponding fields.
8. Verify that the Staff ID box displays the staff member seeing the patient. If it does not, type the ID (or press F2 to search). In the Checked in by box, a staff ID may appear by default and/or be required.

Update check-in information

To update check-in information, open the Patient Check-in/out window (see above) and click Update.
Use the Census List or Daily Planner

Use the Census List to see all patients checked in to your practice, the assigned staff member, the room, the reason for visit, and how many patients have checked in/out for the day. To view the Census List, press F3.

Use the Checked-In tab on the Daily Planner to see a list of checked-in patients, and client, patient, staff, and visit details. To see appointment and check-in alert notes, hover the mouse pointer over the icons on the right.

To view the Daily Planner, click and then click the Checked-In tab. Select View for all staff to see all checked-in patients.

Census List/Daily Planner actions

<table>
<thead>
<tr>
<th>To…</th>
<th>Do this in Census List…</th>
<th>Or do this in Daily Planner…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh the list</td>
<td>Click the Refresh button.</td>
<td>Click the Refresh button.</td>
</tr>
<tr>
<td>Change the view</td>
<td>Use the View and Sort by drop-down lists to display and sort the patient list. You can also view by staff, suite, and room. <strong>Tip:</strong> For Multi-Location/Single-Database practices, the Census List will also have a Practice drop-down list.</td>
<td>Click the appropriate column header to sort by ascending/descending values; click again to reverse.</td>
</tr>
<tr>
<td>Check out</td>
<td>Select the appointment and click Check-out; then click Yes. You must manually remove an inpatient from the Electronic Whiteboard or check the patient out through invoicing.</td>
<td>Double-click or right-click and then select Update.</td>
</tr>
</tbody>
</table>

Keyboard shortcuts

- **F1** Display onscreen Help for the current window.
- **F2** Look up values for a list, such as with ID fields.
- **F3** Open the Census List.
- **Tab** Move the cursor to the next field.
- **Shift+Tab** Move the cursor to the previous field.
- **Ctrl+U** Update the selected record.
- **Ctrl+Enter** Move the cursor to the next line in note areas.

Right-click menus

Use right-click menus for quick access to the Patient Clipboard on the Daily Planner.

For more information

For Patient Check-in/out and Census List setup and detailed instructions, see the Cornerstone Help. Go to idexxlearningcenter.com to view snippet videos about many other Cornerstone features. Find this document at idexx.com/cornerstonehelp.