

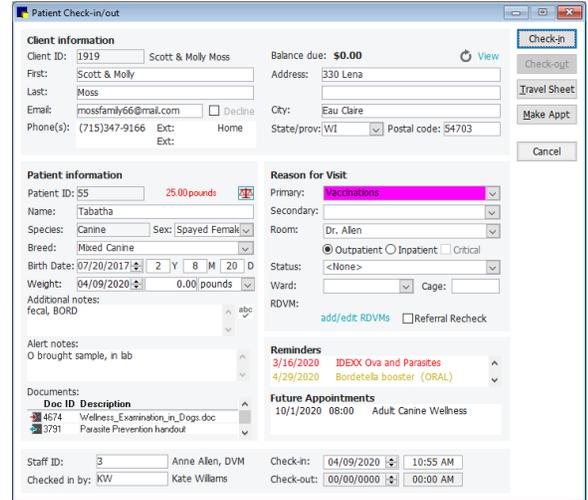
Check-in and Census List

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

Open the Patient Check-in/out window

You can access the Patient Check-in/out window any of these ways:

- **Patient Clipboard***—With the client’s account open, 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 go to **Lists>Census** to open the Census List. Select the patient from the **Scheduled Appointments** view and click **Check-in**.
- **Toolbar**—Click the **Check-in/out** button .



Check in a patient

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

1. Open the Patient Check-in/out window (see above), and in the **Client ID** and the **Patient ID** boxes, type the IDs or press **F2** to search. You can modify client and patient information as needed.
2. In the **Additional notes** box, type any notes to be printed on the Check-in Report and saved to the patient record.
3. In the **Alert notes** box, type an alert for this visit only. The alert is displayed on the Electronic Whiteboard and the Checked-in tab of the Daily Planner for the current visit only. Once the patient is checked out, the most recent alert information is available with a document patient bookmark.
4. In the **Documents** area, specify documents to be printed upon check-in (besides the Check-in Report) or check-out.
5. 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** checkbox 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. **Note:** This status appears on the Daily Planner checked-in and PVL tabs, as well as on the Census List Patients in Hospital view.
 - e. If applicable, include the ward and cage information.
 - f. As needed, click the **add/edit RDVMs** link to update RDVM information. Select **Referral Recheck** to separate new vs. recheck referral visits. **Note:** this checkbox may already be selected, based on the primary Reason for Visit.
6. View reminders and upcoming appointments in the corresponding fields.
7. 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

Open the Patient Check-in/out window (see above) and click **Update**.

Use the Census List or Daily Planner

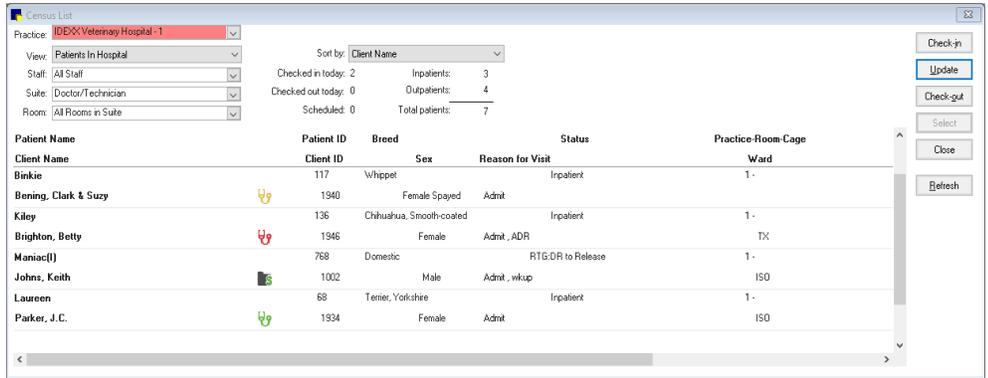
To view the Census List: Press F3.

- Use the Census List to see a list of checked-in patients, assigned staff members, rooms, reasons for visit, hospital statuses, and how many patients have checked in/out for the day.

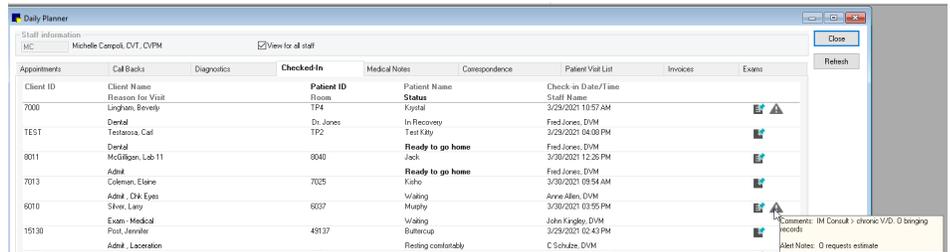
To view the Daily Planner: Click  and then click the **Checked-In** tab.

- Select **View for all staff** to see all checked-in patients.
- The Checked-In tab displays a list of checked-in patients and client/patient/staff/visit details, including hospital status.
- To see appointment and check-in alert notes, hover the mouse pointer over the icons on the right.

Tip: The Daily Planner can be set to open at login under: **Controls > Defaults > Staff > Miscellaneous.**



Census List



Daily Planner

To...	Do this in Census List...	Or do this in Daily Planner...
Refresh the list	Click the Refresh button.	Click the Refresh button.
Change the view	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. Tip: For Multi-Location/Single-Database practices, the Census List will also have a Practice drop-down list.	Click the appropriate column header to sort by ascending/descending values; click again to reverse. You can also change the Staff ID or select View for all staff .
Check out	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.	Double-click or right-click and then select Update .

Keyboard shortcuts

F1	Display on-screen Help for the current window.
F2	Look up values for a list, such as 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.