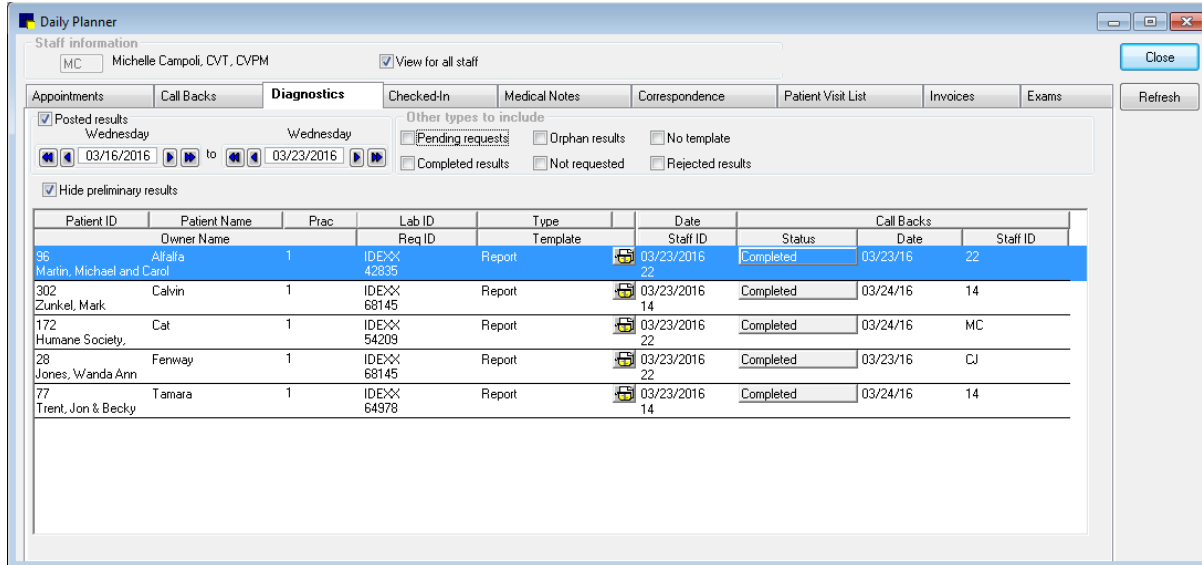



Cornerstone* Daily Planner



The Daily Planner window displays open cases for patients currently being seen at the practice. The information on the Daily Planner is organized in nine tabs.



Opening the Daily Planner window

- **Toolbar**—Click the **Daily Planner** button .
- **Menu**—On the **Activities** menu, select **Daily Planner**.

Daily Planner tabs

Tab	Description
Appointments	View appointments for currently checked in patients, scheduled patients, and no-shows. Use the right-click options to check the patient in, update the appointment, or open the Patient Clipboard*.
Call Backs	View scheduled reminder callbacks. Use the right-click options to update a callback, delete a callback, add a note to the callback, change the date of the callback, enter patient comments about the callback, or open the Patient Clipboard. By default, callbacks are listed for the past 7 days. This setting can be adjusted under Controls > Defaults > Practice & Workstation > Daily Planner .
Diagnostics	View and manage many of your laboratory-related tasks, including viewing VetConnect* PLUS results and lab callbacks. Use the right-click options to update a lab request, update a callback, update a lab result, refresh the information, or open the Patient Clipboard.
Checked-In	View a list of patients currently checked into the practice. Use the right-click options to update check-in information, check out the patient, or open the Patient Clipboard. Tip: Hover the cursor over the Appointment Notes icon  to view appointment notes for the patient and the Alert Notes icon  to view alert notes.
Medical Notes	View tentative medical notes and classic medical notes to see which medical notes need to be reviewed and marked as final (finalized medical notes are not displayed). Use right-click options to update or finalize medical notes or open the Patient Clipboard.
Correspondence	Access tentative correspondence documents to see which correspondence documents need to be reviewed and marked as final (finalized correspondence documents are not displayed). Use right-click options to update the correspondence or open the Patient Clipboard.

Tab	Description
Patient Visit List	View items on the Patient Visit List by staff member or item classification. Use the right-click options to update the Patient Visit List, print the Patient Visit List Report, or open the Patient Clipboard.
Invoices	View a list of open invoices. Use the right-click options to update an invoice or open the Patient Clipboard.
Exams	View a list of open physical examinations and Patient Advisor examinations. Use the right-click options to update an examination or open the Patient Clipboard.

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

Use right-click menus for quick access to shortcut options on each tab.

Tip: Click **Refresh** or right-click and select **Refresh** to update the Daily Planner after making changes in another window.

For more information

- For Daily Planner setup and detailed help, see the **Daily Planner** section of the Cornerstone Help.
- Go to idexlearningcenter.com to view snippet videos about the Daily Planner.

Find this guide

Look under “Other Resources” on the [Cornerstone Software Resources](#) page.