

Estimates

A detailed estimate gives your client a realistic idea of the range of expenses that may be incurred for a patient requiring outpatient or inpatient care and services.

Estimated quantities

Petly* Plans status

Line item entry grid

Action buttons

Petly Plans discount

Move selected item up/down

Open travel sheet and transfer items

Low and high estimate totals

Item ID	Description	Qty - Low	Qty - High	Low Price	High Price	Staff	Center	Disc	Tax	Date
1	WP1002 WP Exam - Annual Wellness	1.00	1.00	\$53.05	\$53.051	H		No	No	10/17/2017
2	WP2560 WP Bordetella Booster (ORAL)	1.00	1.00	\$14.00	\$14.001	H		No	No	10/17/2017
3	WP2530 WP DHPP 1 year	1.00	1.00	\$20.05	\$20.051	H		No	No	10/17/2017
4	IL1850 IDEXX Adult Screen	0.00	1.00	\$0.00	\$186.641	H		No	No	10/17/2017
5	IL111 IDEXX Chem 25 w SDMA	1.00	0.00	\$140.74	\$0.001	H		No	No	10/17/2017
6	5550 Radiographs - First 2 Views	0.00	1.00	\$0.00	\$115.501	H		No	No	10/17/2017
7	2600 Pedicure	1.00	1.00	\$23.10	\$23.101	H		No	Yes	10/17/2017
8								No	No	00/00/0000

Client / patient information
 Client ID: 19757
 Name: Donald Macomb
 Patient ID: 62425 Gertrude
 2 Yrs. 9 Mos.
 Retriever, Golden
 Spayed Female
 70 pounds
 Active Plan

Estimate information
 Estimate #:
 Description:
 Annual visit with diagnostics

Total - Low: \$165.57 Total - High: \$326.97

Open the Estimate window


- Patient Clipboard*—In the Patient information area, right-click the patient and select **Estimate**.
- Toolbar—Click the **Estimate** button

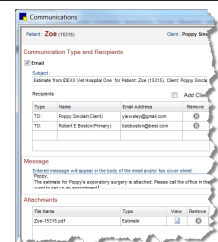
Create and save an estimate

1. In the Estimate window, if the client information is not displayed, type the ID in the **Client ID** box (or double-click or press F2 to search for the client), and then type the patient ID in the **Patient ID** box or press F2 to select the patient.
2. In the **Estimate** box, press Tab to assign an estimate number (for a new estimate). If a saved estimate is displayed, press Ctrl+N to create a new estimate. To view all existing estimates, press F2; an **F** appears next to finalized estimates.
3. In the **Description** box, type the purpose of the estimate, if applicable. **Note:** This description will appear on the Estimate tab of the Patient Clipboard and in Patient History when the estimate is electronically signed.
4. In the **Item ID** box, type an invoice item ID, or press F2 or double-click to search for the item.
5. In the **Qty-Low** and **Qty-High** fields, adjust the estimate quantities; press Tab to update prices as needed. **Note:** The Qty-High field can be 0 if the Qty-Low field is 1 to create an either/or option on the estimate. See the example above.
6. Repeat steps 4 and 5 for each item, and then click **OK**.

7. In the Save Estimate window, in the Estimate footer area, select a message from the **Message** drop-down list. The message will be printed on the estimate.
8. Select either **Save and continue** or **Preview/Signature**:
 - If you select **Save and continue**:
 - a. Click **Options**, if needed, to modify estimate defaults for printing details and Patient Visit List item transfer preferences; click **OK**.
 - b. On the Save Estimate window, select options to print the estimate, email it, save it for a specific time period, and/or finalize it; click **OK**.
 - If you select **Preview/Signature**:
 - a. Click **OK** on the Save Estimate window. The Print Preview window opens.
 - b. On the Print Preview window, choose options to:
 - Save and/or manually finalize the estimate, print it, or email it.
 - Use PDF controls to save the estimate as PDF or print it to a different printer.
 - Have the client electronically sign the estimate to finalize it (see below for details).

Other Estimate window actions

To...	Do this...
Have the client preview and sign an estimate.	Select Preview/Signature and click OK . Show your client the on-screen estimate, and have the client electronically sign it using a supported signature-capture device or tablet. Electronically signed estimates are automatically finalized, saved to patient history, and displayed with an electronically signed icon  .
Finalize a saved estimate.	Open a saved estimate in the Patient Clipboard to finalize it. With the patient record open, click the Estimates tab in the Patient Information area. Double-click the estimate to open it, make any changes, and click Finalize . On the Save Estimate window, select the Save and continue option and click OK .
Transfer items from a travel sheet.	When working with an estimate in progress or a saved estimate, click Travel Sheet to open the Travel Sheet window. Select items to transfer to the estimate and click Transfer .
Change transfer and print detail options.	Once you have saved an estimate, click Options to change transfer and print options.
Email an estimate.	On the Estimate or Estimate Preview window, click Email . In the Communications window, the client's information is completed (when available), and the estimate is attached. Review the Recipients information, and make any changes necessary; for example, add or delete referring doctor information. In the Message box, type the email message and then click Send .



Keyboard shortcuts


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

Right-click menus

Use the right-click menus for quick access to many tools.

Tip: Double-click in ID fields to search for an item.

For more information

For estimate 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/cornerstoneresources