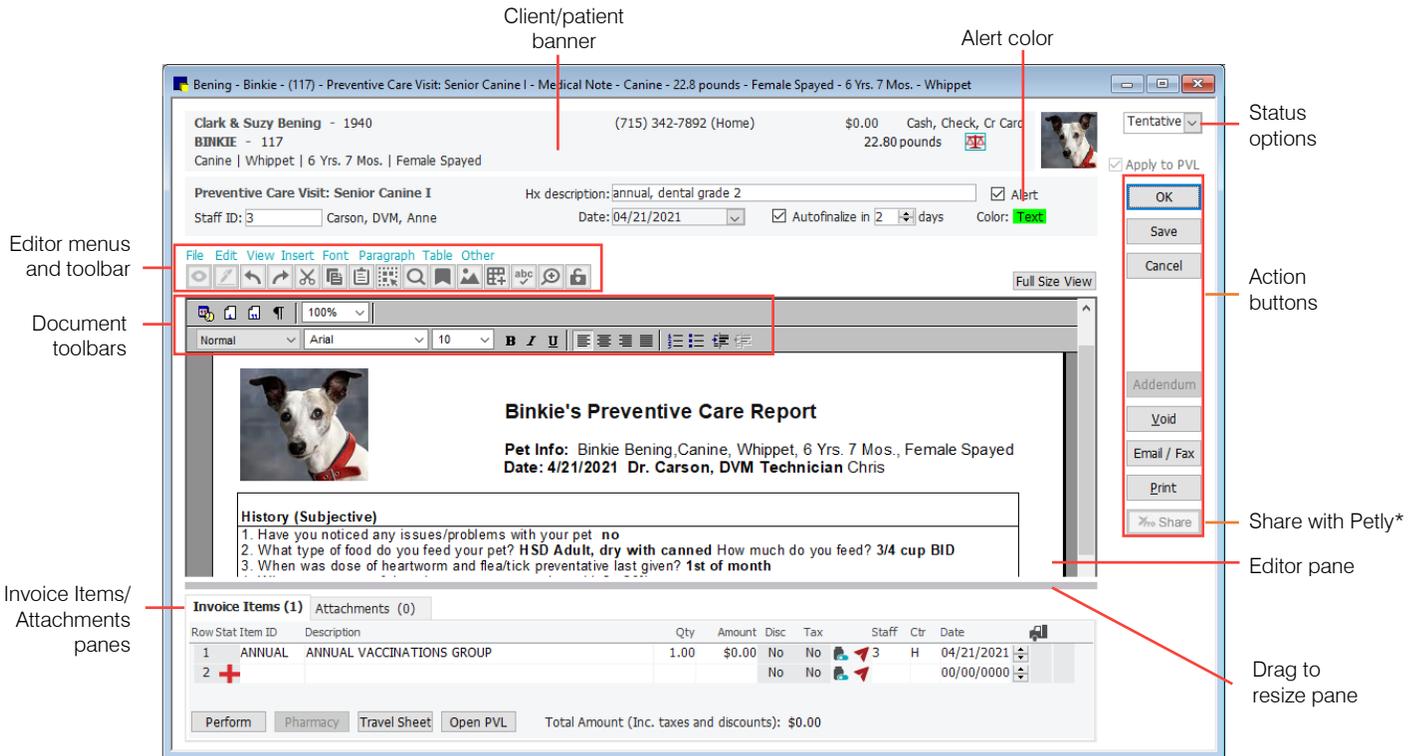


Medical notes

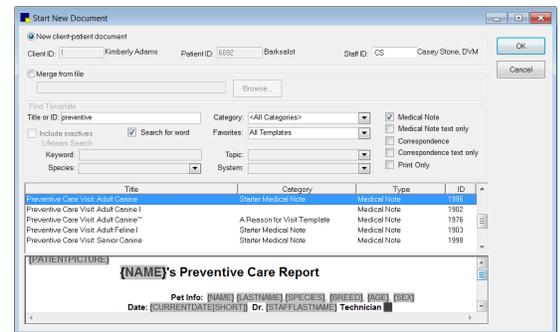
Create medical notes in the Cornerstone* Editor window using Cornerstone templates or those set up by your practice.



Start a medical note

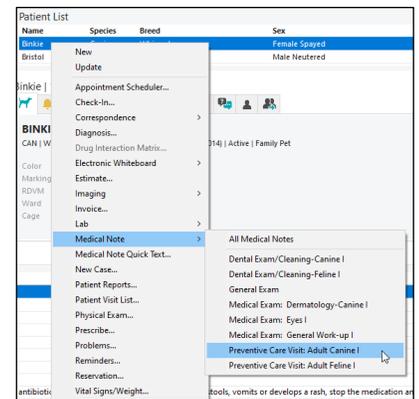
Select a template from the Start New Document window:

1. In the **Patient Clipboard**, right-click the patient's name and select **Medical Note...**, or in the toolbar, click the **Medical Notes** button .
2. In the Start New Document window, fill out any staff, client, and patient information not already entered.
3. Use the options in the Find Template area to search for the template you want, and then select it from the list. A preview is displayed.
4. Click **OK**. The Cornerstone Editor window opens.



If your practice uses favorite documents with document submenus:

1. In the **Patient Clipboard**, right-click the patient's name, select **Medical Note**, and then choose the template from the submenu. Or you can select **All Medical Notes** and then choose a template, as described above.
2. Enter the staff ID when prompted. The Cornerstone Editor window opens. **Note:** For instructions on submenu settings, see "Document defaults" and "Favorite document defaults" in the on-screen help .



Actions in the Cornerstone Editor window

To...	Do this...
Update a patient's weight/vital signs.	Depending on your practice's settings, you may be prompted to update the patient's weight when the Cornerstone Editor window opens. You can click the Vital Signs/Weight  button at any time to open the window. Enter the patient's weight, and click the add more vital signs link to add more information.
Set the status of a medical note.	Use the Status drop-down list to set the status of the medical note to Draft (work in progress), Tentative (basically complete but can be updated), or Final (no changes can be made). The Apply to PVL checkbox is selected by default and cannot be cleared when the medical note is tentative or final. This ensures that any invoice items on the medical note are applied to the Patient Visit List.
Update or modify the document.	The Editor pane is where you can fill in the template, add necessary test and other patient data, or insert pictures or additional bookmarks. Use the menu bar, Editor toolbar, or right-click menus to add elements to the template.
Add invoice items to a medical note.	On the Invoice tab, enter an invoice item ID or press F2 to search for an item. Complete the information for the item row, and then set the status by clicking the button at the beginning of the row:  Recommended  Accepted  Performed  Declined  Declined to History
Attach a document or URL to a medical note.	On the Attachments tab, right-click and select one of the following: New File —Browse to the file's location, select the file, and click Open . New URL —Copy the URL from your browser, right-click in the Attachments area, and select Paste URL .
Lock/unlock a medical note.	Click the Lock/Unlock document  button in the toolbar. When the document is locked  , press the Tab key on your keyboard to quickly insert data in tab-ordered fields or to accept default data without entering text or data.
Email or fax a medical note.	Click the Email/Fax button. If you have not finalized the medical note, you will be prompted to do so. On the Communications window, make changes to the email subject, recipients, and message, as needed, and then click Send .
Share via Pet Health Network* Pro.	Click the Share button. If you have not finalized the medical note, you will be prompted to do so. On the Pet Health Network Pro window, enter the staff ID and a message, and then click OK .
View/update client or patient information	Double-click the client or patient name in the banner to open the corresponding information window. TIP: This is a great way to view patient reminders.

Keyboard shortcuts

F1	Display on-screen Help for the current window.
F2	Look up values for a list, such as 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 the cursor to the next line in note areas.

Right-click menus

Use right-click menus for quick access to many editing tools. The options vary depending on the part of the document you are on.

Tips:

- Click the **Full Size View** button to expand the document working area.
- Double-click the client/patient banner to view or update client/patient information from the document window.

For more information

For medical notes setup and detailed instructions, see the “Medical Notes and Correspondence” section of the Cornerstone Help .

Go to idexxlearningcenter.com to view snippet videos about many features in the Cornerstone Software.

Find this document at idexx.com/cornerstonehelp.