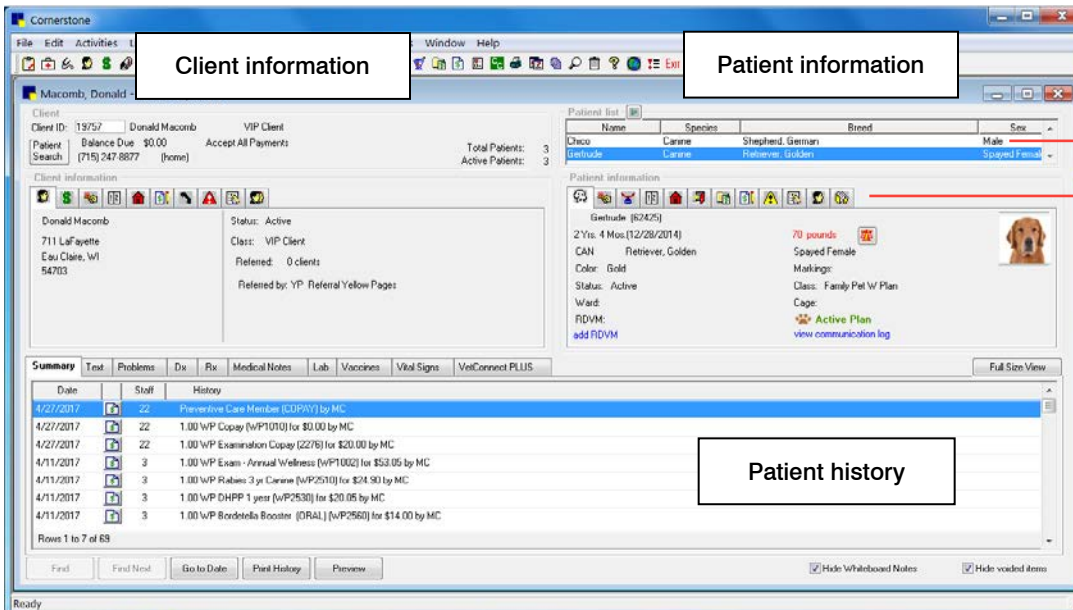


Patient Clipboard*—Clients and Patients

The Patient Clipboard* shows everything in a patient's record. It is divided into three main areas: client information, patient information, and patient history.




Patient list

Hover cursor over icons to learn what each tab does.

Tip: To refresh or clear the data, right-click in the **Client** area and select **Refresh** or **Clear**.


Opening the Patient Clipboard



- Toolbar—Click the **Patient Clipboard** button .
- Menu—On the Activities menu, select **Patient Clipboard**.

Using the Patient Clipboard

1. In the **Client ID** box, type the ID, or to search for the client, press **F2** or double-click. Select the **Include inactives** check box to search all clients.
2. Click the tabs under **Client information** area to view, add, or change information.
3. In the **Patient list** area, select the patient to view from the client's list of pets.
4. Click the tabs under **Patient information** or in the patient history area to view, add, or change information.

Common actions

To...	Do this...
Add a new client	Open the Client List window (see step 1 above), and ensure there isn't an existing account. Click New ; in the Client ID box, type the ID or press Tab to accept an automatically assigned ID.
Update client information	Right-click in the Client area and select Update .
Add a new patient to a client	Right-click in the Patient list area and select New . In the Patient ID box, type the ID or press Tab to accept an automatically assigned ID. On the Information tab, complete the Information and Weight/Body Score areas. Complete any relevant information on the remaining tabs. Tip: To learn how to add a pet picture, see "Using Patient Picture" in the Cornerstone Help  .

To...	Do this...
Update patient information	In the Patient list area, right-click the patient and select Update . Acknowledge or resolve any alerts and make the changes to the patient's information.
Add a patient weight	In the Patient list area, right-click the patient and select Vital Signs/Weight . Update the Weight Entry area and make any other vital sign updates. You can also click the Vital Signs button  on the Patient Information tab in the Patient Information area.
Add or edit patient reminders	In the Patient list area, right-click the patient and select Reminders . On the Letters and Call Backs tabs, add or edit reminders. You can also view, add, and edit reminders on the Reminders tab in the Patient information area.
View or edit a patient's Petly* Plan information:	In the Patient information area, click the Petly Plans widget button  Active Plan to view available items (active plan) or update/enroll a patient (inactive/not enrolled plan statuses). Right-click the button to refresh the plan status. Note: All patients display a Not Enrolled status if your practice does not subscribe to Petly Plans.
View client communications	In the Patient information area, click view communication log to view outbound email and fax communications.
Update patient status to inactive or deceased	In the Patient list area, right-click the patient and click Update . From the Status drop-down list, select Inactive or Deceased . For a deceased patient, verify the deceased date.
Transfer patient ownership	In the Patient list area, right-click the patient and select Update . In the Owners area, right-click the owner to be changed and select Update . In the Status area, select Past and then click OK . Right-click in the Owners area and select New . Enter the new owner's client ID. Note: Medical history follows the patient. Financial history (invoices) are retained by the original client.

Keyboard shortcuts

F1	Display onscreen Help for the current window.
F2	Look up values for a list, such as in ID fields.
F7/F8	Move through recently accessed client/patient lists.
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 tools. Different right-click options are available in each section of the Patient Clipboard.

Tip: Double-click in an ID field to search for an item. Double-click any tab in the **Patient information** or **Client information** area to open the information window.

For more information

For detailed Patient Clipboard instructions, see "Patient Clipboard" in the Cornerstone Help .

Go to idexxlearningcenter.com to view snippet videos about the Patient Clipboard and many other features in Cornerstone.

Find this document at idexx.com/cornerstoneresources