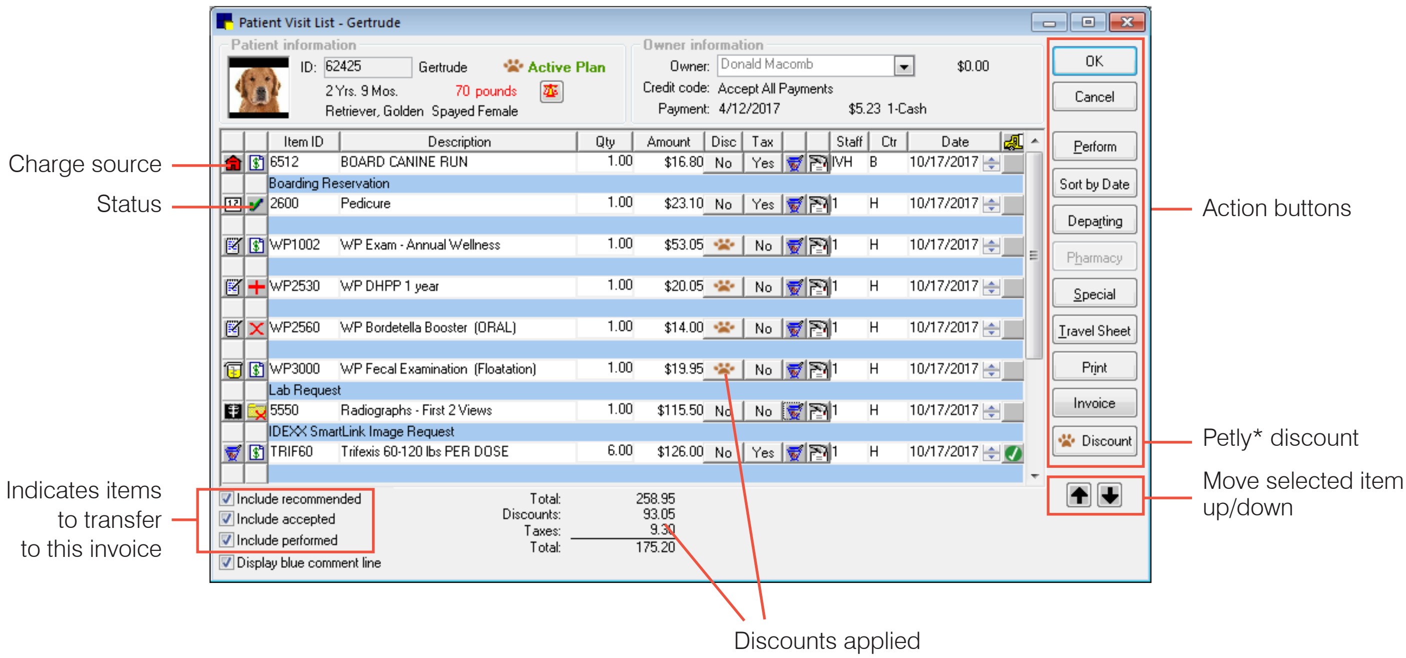
Patient Visit List

The Patient Visit List (PVL) holds invoice items and other information that you may want to transfer later to an invoice or patient history. It also allows you to keep track of communications during a visit.



Open the Patient Visit List window

Access the Patient Visit List window in the following ways:

- **Patient Clipboard***—With the patient selected, in the Patient information area, click the **Patient Visit List** tab, right-click within the tab, and select **Update**.
- **Toolbar**—Click the **Patient Visit List (PVL)** button.
- **Invoice**—On an invoice with existing items, click **Special**, click **Patient Visit,** and then click **OK**.

  Note: The Patient Visit List will open automatically when you open or create an invoice, unless the **Display Patient Visit Message** check box has been selected under **Invoice Defaults**.

Looking at the Patient Visit List

- **Charge source**—When an item is transferred to the Patient Visit List, the first column displays an icon showing the charge source, such as an estimate or a laboratory request. If you add an item directly to the PVL, no icon is displayed.
- **Status buttons**—Item status is displayed in the second column. The + button indicates a recommended item. If the client accepts the recommended item, click the button to change it to ✔. When an item is dispensed or the service is performed, click the button to change it to $ (or to mark all items performed at one time, click the **Perform** button). Use ✕ to indicate a declined item; the item is deleted when the other items are transferred to the invoice, and there is no history entry. Use to indicate declined to history; the item will be deleted when the other items are transferred to the invoice, and a history entry is recorded that indicates the item was recommended but declined. Declined history items cannot be hidden, voided, or edited, but they can be excluded from the Patient History Report.
- **Automatic status updates**—When estimates and appointments are transferred to the PVL, their status is automatically changed to accepted. When boarding, imaging, Electronic Whiteboard, and laboratory items are transferred, their status is automatically changed to performed.

- **Petly* Plans**—Subscribers to Petly Plans will see plan status. Available items will be discounted when you click the Petly Discount button .
- **Include check boxes**—The three check boxes in the lower left of the Patient Visit List indicate which items to transfer to the invoice. If **Include recommended** is selected, items marked + transfer. If **Include accepted** is selected, items marked transfer. If **Include performed** is selected, items marked transfer.
- **Blue comment line**—The blue line that appears under each line item in the PVL grid stores comments or notes about the item. The note is not transferred to the medical record unless it is declined to history. To hide the blue line, clear the **Display blue comment** line check box.

Add recommended items to the Patient Visit List

1. On the Patient Visit List window, if the patient information is not displayed, type the ID in the **Patient ID** box or press F2 to search for the patient.
2. In the next available **Item ID** field, type the ID or press F2 to search for the item.
3. Complete the remaining fields in the line as needed.
4. If necessary, change the status of the item by clicking the button in the first column of the grid.
5. When finished adding items, click **OK**.

Other Patient Visit List actions

To…	Do this…
Add departing instructions.	Click the **Departing** button to open the Departing Instructions window, where you can view and modify departing instructions linked to invoice items on this PVL. You can also add or update general instructions to associate with this PVL.
Process special actions	Click the **Special** button to view and process any special actions linked to the invoiced items on this PVL.
Apply Petly Plans discounts.	Click the Petly Discount button to apply a 100% discount to available plan items when working with a patient on an active plan.
View all PVLs on the Daily Planner window.	Use the **Patient Visit List** tab on the Daily Planner window to view all PVLs associated with a specific staff member or for all staff.
Create an invoice.	After reviewing charges, transfer the items to an invoice to continue posting the invoice by clicking **Invoice**.

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+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

Right-click a status icon to display and select from a list of all PVL statuses

Right-click an icon in the first column of the grid to view a breakdown of the item's pricing.

Tip: Green text rows indicate a price was changed; red text rows indicate duplicate entries.

For more information

For detailed Patient Visit List 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**