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**—Select the patient. In the Patient information area, click the Patient Visit List tab, and then right-click within the tab and select Update.
- **Client/patient search**—Right-click a patient card and select Patient Visit List.
- **Toolbar**—Click the Patient Visit List (PVL) button.

Notes: 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. You can also open the PVL from an invoice containing items by clicking Special > Patient Visit > OK.

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 list, no icon is displayed.
- **Status buttons**—Item status is displayed in the second column. The button indicates a recommended item or service and is displayed by default. To change the item status, right-click the button and select the appropriate status, as follows:
  - **Accepted**. The client has accepted the recommended item/service.
  - **Performed**. The item has been dispensed or the service performed. To mark all accepted items as performed, click the Perform button on the right.
  - **Declined**. The client has declined the item/service. The item will be deleted when the other items are transferred to the invoice, and there will be no history entry.
  - **Declined to history**. The item is declined to history and will be deleted when the other items are transferred to the invoice. A history entry will indicate 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 Patient Visit List, 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 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 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; if necessary, change the item status by clicking the button in the first column of the grid.
4. When finished adding items, click OK.

### Other Patient Visit List actions

<table>
<thead>
<tr>
<th>To…</th>
<th>Do this…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add departing instructions.</td>
<td>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.</td>
</tr>
<tr>
<td>Process special actions</td>
<td>Click the Special button to view and process any special actions linked to the invoiced items on this PVL.</td>
</tr>
<tr>
<td>Apply Petly Plans discounts.</td>
<td>Click the Petly Discount button to apply a 100% discount to available plan items when working with a patient on an active plan.</td>
</tr>
<tr>
<td>View all PVLs on the Daily Planner window.</td>
<td>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.</td>
</tr>
<tr>
<td>Create an invoice.</td>
<td>After reviewing charges, click Invoice to transfer the items to an invoice and continue posting.</td>
</tr>
</tbody>
</table>

### 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 Patient Visit List statuses
- Right-click an individual line 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/cornerstonehelp.