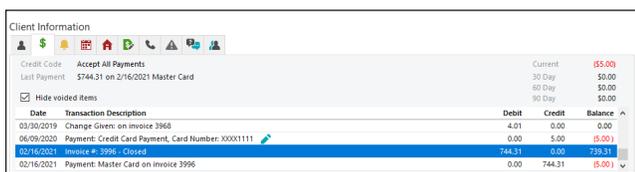# Printing guide

## Reprint an invoice

1. On the Patient Clipboard*, enter the client ID or press **F2** to search for and select the client.

2. In the Client Information area, click the **Account Information 💲** tab. **Note:** You can also use the Client Account window.



3. Double-click the invoice you want to reprint. The invoice information displays in the Client Invoice window.

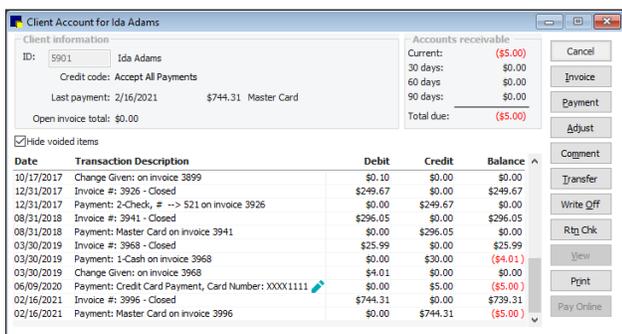4. Click **Print** or **email.**

## Reprint a credit/debit card transaction receipt

To reprint a payment on account or invoice with payment, double-click the transaction in the Client Account window and click **Print**. Reprints of payments on invoices will not contain signatures or detailed card information.

For detailed reprints or for receipts older than 180 days, reprint or access them through the integrated card processor's portal, using the order ID.

## Print a client account history report

1. With the client selected on the Patient Clipboard, right-click in the Client area and select **Client Account**. The Client Account window opens.



2. Click **Print**. The Client Account History window opens.

3. If desired, change the sort order for the report and narrow the report results by specifying a range to print.

4. Click **Preview** or **Print**. You can also opt to hide or include account comments.

## Print/email a patient history report

1. With the client and patient selected on the Patient Clipboard, click **Print History** (at the bottom of the Patient Clipboard) to open the Patient History Report dialog box.

3. Specify a date range.

4. (Optional) In the History area, adjust the types of history information to include in the report (highlighted/shaded lines are selected).

5. Click **OK**. A report preview is displayed.

6. Click **Print**, then **OK**; or click **Email,** complete communication details, and then click **Send**.
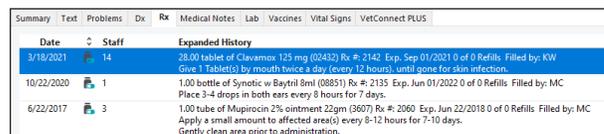
## Print patient reminders

1. From the Patient Clipboard, click the **Reminders 🔔** tab in either the client or patient area.

2. If you clicked In the client area, right-click the patient name and select **Update**; if you clicked in the patient area, right-click anywhere in the **Reminders** tab and select **Update**. The Patient Reminders box appears.

3. Click **Print**.

4. From the pop-up menu, select **Client All Patients**, **Selected Patient Only** (for letter or recall reminder reports), or **Health Certificate** (document setup and default settings required).



5. If you selected either of the first two options above, you can change the sort order and narrow the report results by specifying a range to print. Click **Preview** or **Print**.

6. If you selected the Health Certificate option, enter the **Staff ID** and click **OK** to generate the document. Then click **Print** or **Email/Fax**.

## Reprint a prescription label

1. With the client and patient selected on the Patient Clipboard, click the **Rx** tab in the Patient History area.



2. Double-click the prescription and click **Print**.

## Print or email correspondence

For a document already in the patient history:
Double-click the document from the patient history area on the Patient Clipboard and click **Print** or **Email/Fax.**

For a new document:

1. Select the client and patient on the Patient Clipboard, and then right-click the patient name in the Patient list area and select **Correspondence.**
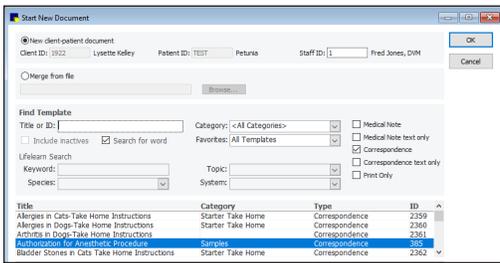
   The next step varies depending on your Cornerstone* settings.

2. If a submenu of templates appears, select a template and enter your staff ID when prompted. Or select **All Correspondence** to open the Start New Document window.
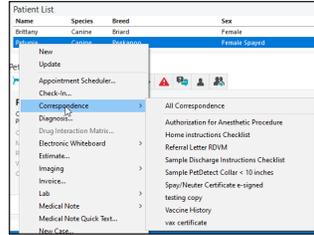
   OR

   If the Start New Document window opens, search for and select a template; enter the appropriate staff ID in the Staff ID field; and then click **OK**.

3. In the Cornerstone editor, customize the text as needed.

4. When finished, click **Print** or **Email/Fax**.

**Note:** The document will be finalized when it is emailed or faxed.

## Print a duplicate rabies certificate

1. With the client and patient selected on the Patient Clipboard, in the patient information area, click the **Tags/Microchip ID** tab.

2. Double-click the rabies tag you want to reprint.

3. Click **Print**.

**Note:** To issue a new rabies certificate, you must invoice an item that has been set up to initiate the Vaccine Tag special action. The Vaccine Tag window opens, where you can enter tag information and print the certificate.

## Create and print or save a report

1. On the **Reports** menu, select **Find a Report**.

2. Do one of the following to find the report:

   - Type a search keyword or phrase and click **Search**. The top five report matches are displayed. The top-ranked report is automatically selected.

   - In the **Reports** list, click a plus sign [**+**] to open a report group and browse through the reports.

3. Click on a report in the **Reports** list to view the report details and a sample in the right-hand pane.
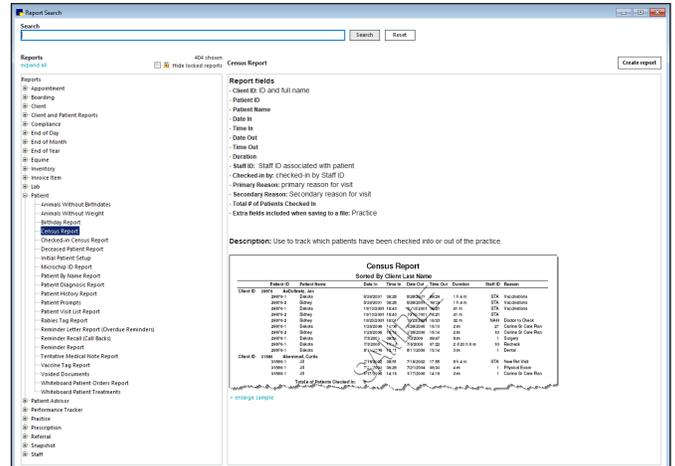
4. If desired, click **+enlarge sample** (located below the report sample image) to view a full-page preview.

5. Double-click the report name or highlight it and click **Create report**. (**Note:** For Inventory reports, click **Create report** and then click **Run**.)

   Depending on the report, different options are available. For standard reports, a Filters dialog box appears.

6. If applicable, set the sort order and specify one or more ranges to filter the information on the report.

7. Do one of the following:

   - Click **Preview** to view the report in the Reports preview window. You can print or save the report from the preview window as well.

   - Click **Print** to set print options and print the report. To save the report as a PDF file, select the **Cornerstone PDF** printer.

   - Click **Save As** to save the data to a file.

   Find this document at **idexx.com/cornerstonehelp.**

IDEXX