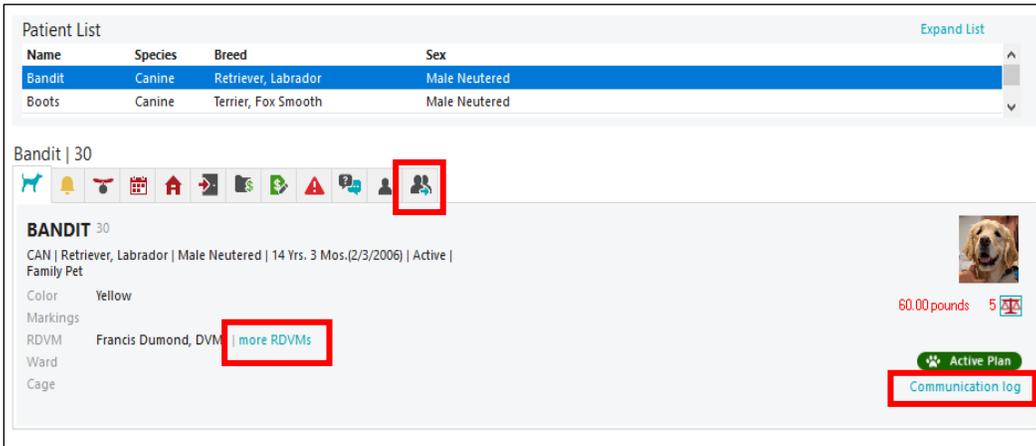


Referral relationship management

Cornerstone* Software offers a comprehensive solution for managing relationships and communications with referring veterinarians (RDVMs). There are many ways to access referral information within Cornerstone. You can view and manage the doctor and hospital information on the Hospital List and Doctor List windows. Go to **Lists>Referrals>Hospitals** or **Doctors**.

Patient Clipboard

When you select a patient on the Patient Clipboard*, the primary RDVM is displayed on the Patient Information tab .



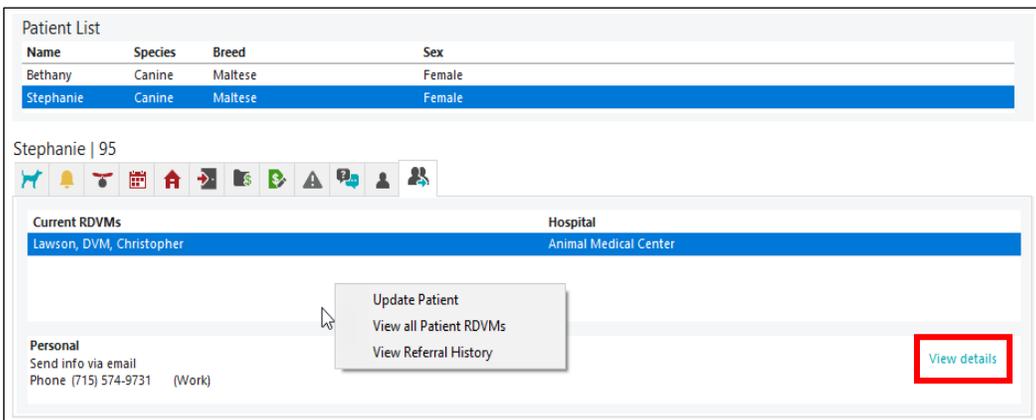
The screenshot shows the Patient Clipboard interface for a patient named Bandit. At the top, there is a 'Patient List' table with columns for Name, Species, Breed, and Sex. Below the table, the patient's details are displayed, including a navigation bar with icons. A red box highlights the 'RDVMs' icon in the navigation bar. Another red box highlights the 'more RDVMs' link in the patient details section. A third red box highlights the 'Communication log' link at the bottom right of the patient details.

Name	Species	Breed	Sex
Bandit	Canine	Retriever, Labrador	Male Neutered
Boots	Canine	Terrier, Fox Smooth	Male Neutered

BANDIT 30
 CAN | Retriever, Labrador | Male Neutered | 14 Yrs. 3 Mos.(2/3/2006) | Active |
 Family Pet
 Color: Yellow
 Markings:
 RDVM: Francis Dumond, DVM | [more RDVMs](#)
 Ward:
 Cage:
 60.00 pounds 5 
[Active Plan](#)
[Communication log](#)

Patient Information tab

- Click the links to view additional RDVMs or communications with the designated RDVM.
- Click the **RDVMs** tab  to view all RDVMs (those designated as This Visit) and their associated hospital information.



The screenshot shows the Patient Information tab for a patient named Stephanie. It features a 'Patient List' table at the top. Below the table, the patient's details are displayed, including a navigation bar with icons. A red box highlights the 'View details' link in the bottom right corner. A right-click menu is open over the patient details, showing options: 'Update Patient', 'View all Patient RDVMs', and 'View Referral History'.

Name	Species	Breed	Sex
Bethany	Canine	Maltese	Female
Stephanie	Canine	Maltese	Female

Stephanie | 95
 Current RDVMs: Lawson, DVM, Christopher
 Hospital: Animal Medical Center
 Personal: Send info via email, Phone (715) 574-9731 (Work)
[View details](#)

RDVMs tab

- In the RDVMs tab, click the **View details** link to view or update the selected RDVM's communication information.
- Use the right-click menu to update the patient, view all RDVMs, and view referral history.

Patient Information window

The Patient Information window Referrals tab lets you view current RDVMs and hospitals, as well as the referral history for the patient.

The screenshot shows the 'Patient Information for Stephanie' window. The 'Referrals' tab is active. It displays a table with columns for 'Doctor', 'Hospital', 'Primary', and 'This visit'. The 'View Referral History' link is highlighted with a red box. The 'Primary' and 'This visit' columns are also highlighted with a red box.

Doctor	Hospital	Primary	This visit
Nolles, Charity	Animal Specialty Care	<input type="radio"/>	<input type="checkbox"/>
Lawson, DVM, Christopher	Animal Medical Center	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

- Click the **View Referral History** link to view history. (In the history view, click **View rDVMs for this patient** to go back.)
- Specify a primary RDVM to associate with this patient on the Patient Clipboard, in referral history, in patient documents, and on referral revenue reports.
- Select the **This visit** checkbox to specify which RDVMs on this case should receive email/fax communications about the patient.

Patient check-in/out window

When you check a patient into the practice, if a primary RDVM has been assigned for the patient, the RDVM is listed in the Reason for Visit area of the Patient Check-in/out window. In addition, you can click the **add/edit RDVMs** link to open the Patient Information window **Referrals** tab , where you can update RDVM information.

Tip: To add or update a doctor or hospital, on the **Lists** menu, go to **Referrals>Doctors** or **Referrals>Hospitals** or **Doctors**, click **New** or **Update**, and then enter information in the text boxes.

The screenshot shows the 'Reason for Visit' section. It includes fields for Primary, Secondary, Room, Status, Ward, and Cage. The RDVM field is highlighted with a red box and contains the text 'Christopher R Lawson, DVM' and a link 'add/edit RDVMs'. There is also a checkbox for 'Referral Recheck'.

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.

Tips:

- Double-click in an ID field to search for an item.
- Double-click in many fields to open the corresponding window.

For more information

For setup and other detailed instructions, see the “Referral Relationship Management” 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.