

IDEXX Cornerstone*

Practice Management System



Referral Relationship Management

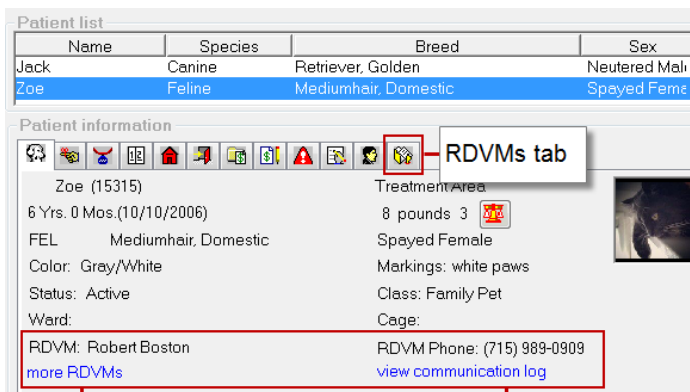
QUICK REFERENCE GUIDE

Cornerstone* offers a comprehensive solution for managing your relationships and communications with referring veterinarians (RDVMs). There are a variety of 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 displays on the **Patient Information** tab . Click the links to view additional RDVMs or communications with the primary RDVM. Click the **RDVMs** tab  to view all current RDVMs and their associated hospital information; click the **view details** link to view or update the selected RDVM's communication information.

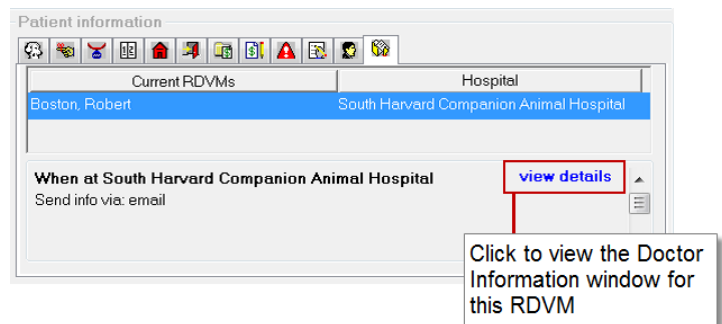


| Name | Species | Breed | Sex |
|------|---------|----------------------|---------------|
| Jack | Canine | Retriever, Golden | Neutered Male |
| Zoe | Feline | Mediumhair, Domestic | Spayed Female |

Patient information for Zoe (15315):
6 Yrs. 0 Mos. (10/10/2006)
FEL Mediumhair, Domestic
Color: Gray/White
Status: Active
Ward:
RDVM: Robert Boston
[more RDVMs](#)
Treatment Area: 8 pounds 3
Spayed Female
Markings: white paws
Class: Family Pet
Cage:
RDVM Phone: (715) 989-0909
[view communication log](#)

Click the link to view additional RDVMs

Click the link to view communications with this RDVM



Current RDVMs: Boston, Robert
Hospital: South Harvard Companion Animal Hospital

When at South Harvard Companion Animal Hospital
Send info via: email
[view details](#)

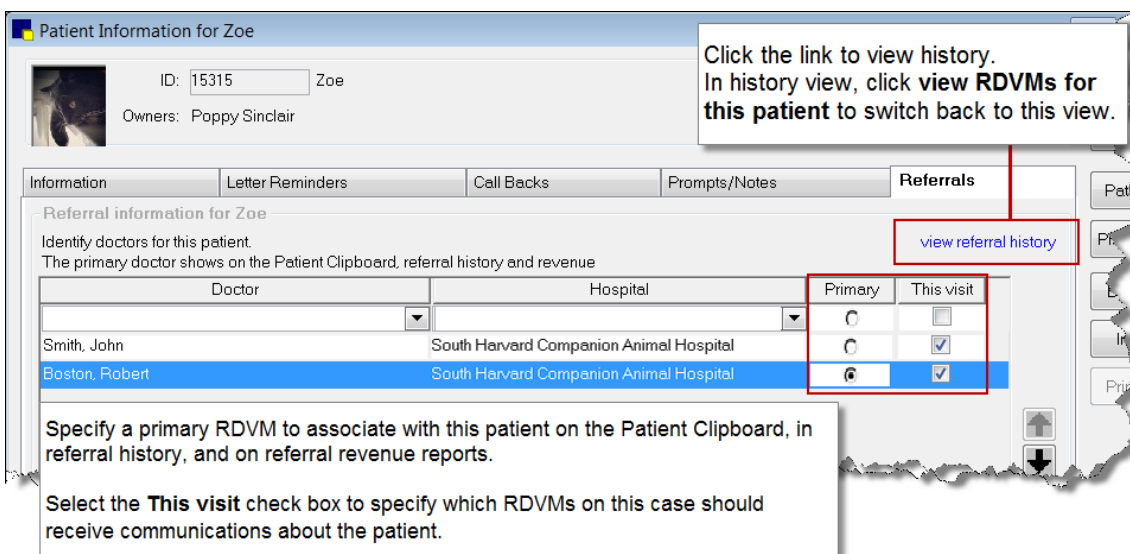
Click to view the Doctor Information window for this RDVM

Tip

Use the right-click menu to access detailed referral information and contacts for the patient.

Patient Information window

The Patient Information window's **Referrals** tab allows you to view RDVMs and hospitals for the patient, as well as referral history for the patient.



Patient Information for Zoe
ID: 15315 Zoe
Owners: Poppy Sinclair

Referrals tab: Referral information for Zoe
Identify doctors for this patient.
The primary doctor shows on the Patient Clipboard, referral history and revenue

| Doctor | Hospital | Primary | This visit |
|----------------|---|----------------------------------|-------------------------------------|
| Smith, John | South Harvard Companion Animal Hospital | <input type="radio"/> | <input type="checkbox"/> |
| Boston, Robert | South Harvard Companion Animal Hospital | <input checked="" type="radio"/> | <input checked="" type="checkbox"/> |

[view referral history](#)

Specify a primary RDVM to associate with this patient on the Patient Clipboard, in referral history, and on referral revenue reports.

Select the **This visit** check box to specify which RDVMs on this case should receive 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 addition, you can click the **add/edit RDVMs** link to open the Patient Information window's **Referrals** tab, where you can update RDVM information.

The screenshot shows the 'Patient Check-in/out' window with the following sections:

- Client information:** Client ID: 9041, Poppy Sinclair, 32 Maple Ave, Harmony, ME 04321, Phone(s): (207) 755-5555, Ext: []
- Patient information:** ID: 15315, Zoe, 8 pounds 3 [] Medium, 6 Yrs. 0 Mos. Spayed
- Check-in/out information:** Staff ID: 406, Bridget Wall, RDVM: Robert E Boston, [add/edit RDVMs](#) (highlighted with a red box and callout), Reason for Visit: Referral Recheck, Primary: Consultation, Secondary: [], Additional notes: []

Tip

To search for a doctor or hospital, on the **Lists** menu, go to **Referrals > Doctors** or **Referrals > Hospitals** and then enter information in the text boxes.

KEYBOARD SHORTCUTS

| | |
|---------------------|--|
| F1 | Display online 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 + Enter | Move cursor to the next line in note areas. |

RIGHT-CLICK MENU

Use right-click menus for quick access to many 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 information and detailed instructions, see the Referral Relationship Management section of the Cornerstone* Help. Go to idexxlearningcenter.com to view snippet videos about many features in Cornerstone.



idexx.com/cornerstone

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