IDEXX **Cornerstone***

Practice Management System

This quick reference guide applies to Cornerstone 8.1 and higher. If you are using a previous version, some features and windows may vary from those shown here.

Frequently Used Tools and Daily Tasks — QUICK REFERENCE GUIDE

Starting the Cornerstone Software

1. To open the Cornerstone* software, do one of the following:
   - Double-click the Cornerstone shortcut icon on your desktop.
   - Click the **Start** button on the taskbar, select **Programs**, select **Cornerstone**, and then click **Cornerstone**.

   The Cornerstone Log In dialog box appears.
2. In the **User** box, type your staff ID or select your name from the drop-down list, then press TAB.
3. In the **Password** box, type your password. As you type your password, asterisks appears in place of the characters.
4. Click **OK** or press ENTER.

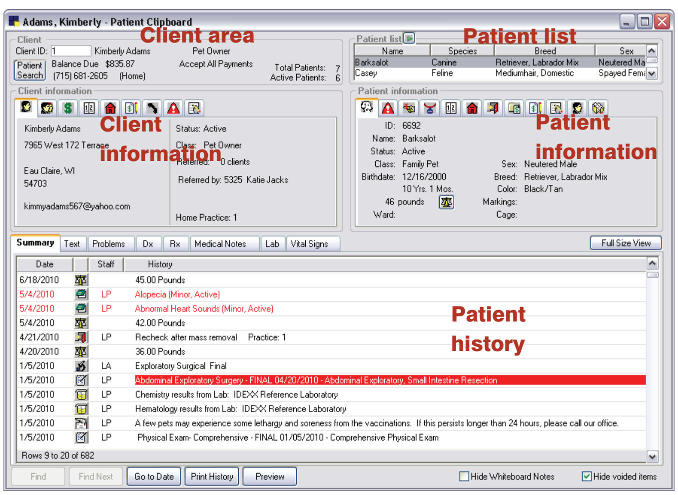
The Patient Clipboard

The Patient Clipboard* provides a central location from which to view or access information. Using the Patient Clipboard gives you easy access to common tasks (using right-click menus), while keeping the client and patient general information available.

To access the Patient Clipboard:

- Click the **Patient Clipboard** toolbar button.

The Patient Clipboard is divided into five areas, as shown below.



In each area of the window, right-click to display a menu of commands for that area.

Tip: The *Patient history* area can be displayed in normal view (shown above), full size view, and with a Preview pane view for previewing medical notes, correspondence documents, and IDEXX Lab Reports from the Patient Clipboard.

Helpful Hints for Using the Patient Clipboard

- To move from field to field, press the TAB key.
- Right-click to display shortcut menus.

Summary of Tabs in the Client Information Area

Client Information: View or update basic client information, such as address and phone numbers.

Account Information: Access the client's account information.

Reminders: View or update reminders for the client's animals.

Scheduled Appointments: View or update appointments.

Reservations: View or update boarding reservations for the client's animals.

Estimates: View or update estimates for the client.

Phones: View or update the client's phone numbers.

Client Alerts: View or process alerts relating to the client.

Prompts and Notes: View or update client prompts and notes.

Secondary Names: View or update additional names on the client's record.

Tip: On each tab, right-click to select from a menu of commands related to that tab.

Summary of Tabs in the Patient Information Area

Patient Information: View or update basic information, like birth date and breed.

Reminders: View or update reminders for the selected patient.

Tags/Microchip ID: View or update the patient's microchip ID, rabies/vaccine tag, and registration information.

Appointments: View or update appointments for the selected patient.

Reservations: View or update boarding reservations for the selected patient.

Check-in: Check in a patient. If the patient is already checked in, details about the check-in are displayed.

Patient Visit List: View or update the patient's items on the Patient Visit List.

Estimates: View or update estimates for the patient.

Patient Alerts: View or process alerts relating to the patient.

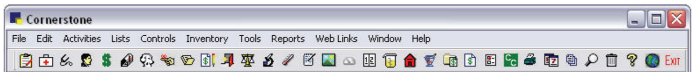
Prompts and Notes: View or update patient prompts and notes.

Owners: View or update the patient's ownership information.

Referrals: View or update referral information.

Tip: On each tab, right-click to select from a menu of commands related to that tab.

Toolbar Buttons



- Patient Clipboard
- Daily Planner
- Whiteboard
- Client
- Client Account
- Correspondence
- Patient
- Patient Reminders
- Patient File
- Estimate
- Check-in/Out
- Vital Signs/Weight
- Patient Diagnosis
- Patient Advisor/Physical Exam
- Medical Notes
- Patient Images
- Imaging
- Schedule for Today
- Lab Requests and Results
- Reservation List
- Prescription Labels
- Patient Visit List
- Invoice
- Want List
- Care Credit
- Print
- End of Day
- Reports
- Find (F2)
- Delete (CTRL+ D)
- Help
- Support Center
- Exit

Keyboard Shortcuts

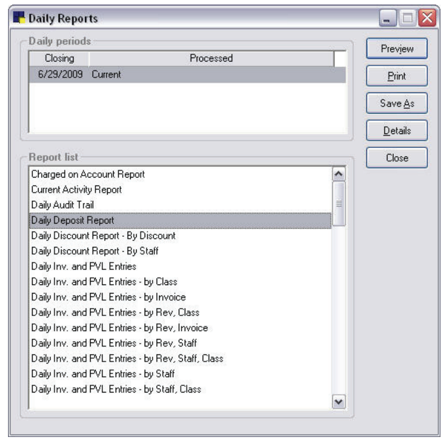
F1	Open the online Help
F2	Look up and select from a list
F3	Display the Census List (patients currently checked into practice)
F7	Move back through names on the Client List or Patient List
F8	Move forward through names on the Client List or Patient List
CTRL+N	Create a new item (e.g., an invoice)
CTRL+D	Delete a highlighted field or blank record
CTRL+U	Update a highlighted field
CTRL+L	Log off Cornerstone
CTRL+ENTER	Start a new line when typing in a text box
TAB	Move to the next field
SHIFT+TAB	Move to the previous field

Daily Tasks

Balance the drawer

This procedure may be performed at any computer.

1. On the **Reports** menu, select **End of Period,** then select **End of Day**.
2. Under *Daily periods*, select **Current**.
3. Under the *Reports list*, select **Daily Deposit Report**.



4. Click **Preview** to view the report, or click **Print** to print the report.
5. If the drawer balances against the Daily Deposit Report, complete your end-of-day processing.

   OR

   If the drawer does not balance, print the **Daily Payment Register** or **Itemized Audit Trail** to find the error.
6. Click **Close**.

Run End of Day processing

This procedure may be performed on the server or on any workstation. Staff will not be able to invoice or process payments during this process.

1. On the **Activities** menu, select **End of Period,** then select **End of Day**.
2. In the Note box, type any notes concerning this daily period closing or type your initials, and click **OK**.
3. Click **OK**. You are prompted to confirm the decision.
4. Click **Yes**.

Print End of Day reports

1. On the **Reports** menu, select **End of Period,** then select **End of Day**.
2. Under *Daily periods*, select the date of the daily reports you want to print.
3. Click **Print** to print default reports.

   OR

   To print an individual report, select the report, then click **Print**.

IDEXX LABORATORIES

idexx.com/cornerstone