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 appear 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.

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### 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.

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### 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.

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

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.