

IDEXX Cornerstone®

Patient Advisor® User's Guide



Practice what's possible™

IDEXX
LABORATORIES

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What can Patient Advisor do for my practice?

Read this manual

Please read this manual very carefully before using Patient Advisor. It contains information on how to use this program efficiently. We recommend using the procedures described here to add, update and view medical information contained within the software.

The client instructions and medical protocols included with Patient Advisor software are intended as convenient starting material for veterinarians to adapt to their own practice policies and procedures; VetConnect Systems, Inc. does not represent or warrant that these instructions or protocols provide either preferred or optimal practice for specific conditions or patients. Accordingly, these instructions and protocols should be modified to fit the needs of your practice and your clients. The responsibility for selecting the appropriate diagnostic and therapeutic regimen for any given patient remains with the graduate veterinarian overseeing its care.

Warning VetConnect Systems, Inc. assumes no responsibility for patient liability with respect to the use of any information contained within Patient Advisor. Your use of the Patient Advisor software is subject to the express terms and conditions of the written license agreement by and between VetConnect Systems, Inc. and you.

Patient Advisor and you

Patient Advisor is an additional program that enhances Cornerstone® Foundation software. Patient Advisor is an entirely different approach to the way most veterinarians practice medicine because it:

- Is medically-driven. The software creates information as it guides you through a computerized outline of a standard exam instead of creating information after you have performed the services.
- Integrates with Cornerstone Foundation. You can transfer the services you performed to the invoice, add information to medical history and produce prescription labels.
- Is a "win-win" situation for every veterinarian who uses this product and every client who goes to a veterinarian who uses this product.

- Is designed to help you set a new record of pet visits and profits by doubling the average number of pets seen per veterinarian and simultaneously increasing profits. Today the average number of pets seen per veterinarian per year is 3000.

Gather consistent medical records

- Records and identifies services you provided as well as services your clients declined.
- Includes customized exam information as it guides the user through each body system.
- Records the information when and where it is generated, increasing the accuracy of the medical information gathered.
- Creates an outline of what is to be covered during an exam, providing more consistent and thorough exams. This formalizes the "Standard of Care" and empowers your staff.
- Saves your observations so you can use them later as customized exam information.

Provide personalized, consistent information to clients

- Generates Pet Health Report Cards, which enhance your clients' understanding and adds value to your services. Each document is personalized for the patient and his owner, facilitating easy explanation of services to be performed.
- Generates Treatment Plans, which provides consistent information to each client and prepares the clients for second visit contingency plans. Treatment Plans educate your clients with important information about their pet's health, increasing client compliance and responsibility.
- Medically driven client correspondence which reminds on diagnostic codes, providing a higher level of care, and enhancing the opportunities to see the patient to monitor the chronic condition.

What does this mean for the doctor?

If we contribute to the doctor's efficiency, the doctor can:

- See more patients.
- See patients more often.
- Increase and provide a standard level of medicine to all clients.
- Allow the client to decline the treatment rather than not recommend products and services at all.
- Ensure quality control through the entire hospital.
- Encourage better client compliance.
- Increase profits.

Disclaimer

We are proud to provide you with the right tools to help make your job easier and your practice more productive.

IMPORTANT We strongly recommend that you take the time to read this manual before you begin to use Patient Advisor in your practice. You should add or change the start up data to meet your particular practice needs.

 Print the Instruction Templates Report to view start up data included with Patient Advisor. Refer to page 88 for more information on reports.

Because this report is so large, it can take several hours to print. We recommend that you print the report for one system, subsystem or diagnosis.

Before you can use Patient Advisor

Introduction

The Patient Advisor:

- includes the most up-to-date diagnostic information available, allowing you to get started quickly.
- easily integrates with Cornerstone Foundation.

Patient Advisor and the Foundation

Patient Advisor and Cornerstone Foundation work together in many ways.

- As patients are checked into the practice, the patient's file appears as a minimized icon in Patient Advisor. This allows any staff member to easily access the patient's medical history.
- The check-in feature is also available in Patient Advisor.
- As you perform services or dispense medicines during the physical exam, these items may be added to the Patient Visit List in Foundation.
- The Patient Census appears in both Cornerstone Foundation and Patient Advisor so you can quickly see who is checked into the practice.
- Patient Advisor uses species information set up through Foundation.
- You can add a patient picture to a patient's medical history, which you can view in Patient Advisor or Foundation.

Patient Advisor and Prescription Labels

When using Patient Advisor, you can prescribe medicine from:

- The Patient Visit List
- The Patient File
- The Physical Exam
- Prescription Labels on the Activities menu

Getting Started with Patient Advisor... a Checklist

- Review your species information from the Cornerstone Foundation. During the Upload process (the program that installs the start-up data) you must link your species IDs to the ones preset in Patient Advisor. Make sure to link all applicable species. The upload process is done only once. See next page.
- Immediately after installing Patient Advisor and logging into Patient Advisor the first time, the Upload program is initiated. This program installs the Patient Advisor information. The program must be completed before you can use Patient Advisor. See below.
- Review the start up data thoroughly before starting to use Patient Advisor. The information may need to be customized to meet your practice's needs or procedures.
- Use the Patient Advisor List to link your invoice item IDs to the items that are resident in the start up data. Having as many linked as possible before you get started will prevent delays during a physical exam. Carefully review the amount dispensed to make sure it meets your approval.

Installing Patient Advisor

To install Patient Advisor, insert the CD into the CD-ROM drive, choose **Run** from the Start menu on the taskbar, type **d:\setup**, (where **d** represents your CD-ROM drive) and then choose **OK**. Follow the instructions as they appear.

The First Time you Start Patient Advisor

The Upload program contains the information included with Patient Advisor. The information needs to be converted to match your database.

Before you begin

- The program's database update must have been completed. (You should have been automatically prompted to do this when you started the program.)
- The upload must be performed on the server.

To run the Upload program

Patient Advisor Upload

Before proceeding, the Patient Advisor module requires that the start up data is uploaded.

To import species-specific data into the Patient Advisor module, link the species name you use with the standard species names below. If you do not treat this species, select <None>. If a species name is left as <None> no data will be uploaded for that species.

Species link

Avian: Avian	Gerbil: Gerbil
Bovine: Bovine	Guinea Pig: Guinea Pig
Canine: Canine	Hamster: Hamster
Caprine: Caprine	Mouse: Mouse
Equine: Equine	Ovine: Ovine
Feline: Feline	Porcine: Porcine
Ferret: Ferret	Rabbit: Rabbit
Reptile/Amphibian: Reptile/Amphibian	

- 1 The species the Upload can identify appear in the fields.
- 2 Using the drop-down list box, choose your **species name** from the list. If you do not use a species, choose **None**.

 **Warning** Verify the species information you have chosen. You will not be able to redo this process and if your species are not identified here, the start up data related to that species will not be loaded.

- 3 Choose **Process** to link the species information. The start up data is now installed into your database.

Related topics

See the section "Linked vs. Non-linked Invoice Item IDs" on page 18.

Logging into Patient Advisor

As in all Cornerstone programs, when you start the program, the Login dialog box appears.

In Patient Advisor you also have the option of logging in under your room assignment and the staff member assignment. If you choose to login as a particular staff member or in a room, the patients assigned to that staff member or room through the patient check-in appear as minimized icons in the Patient Advisor window.

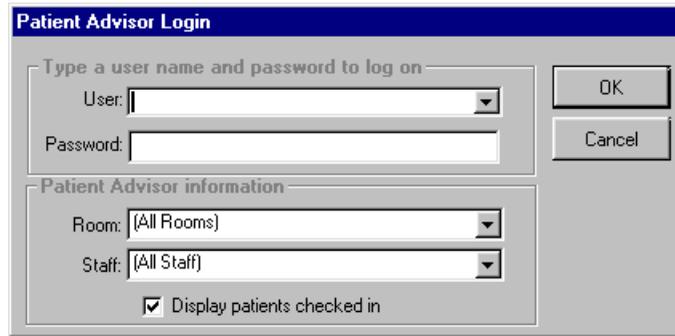
Before you begin

- Open Patient Advisor.
- Add rooms in Cornerstone Foundation.

To log in to Patient Advisor

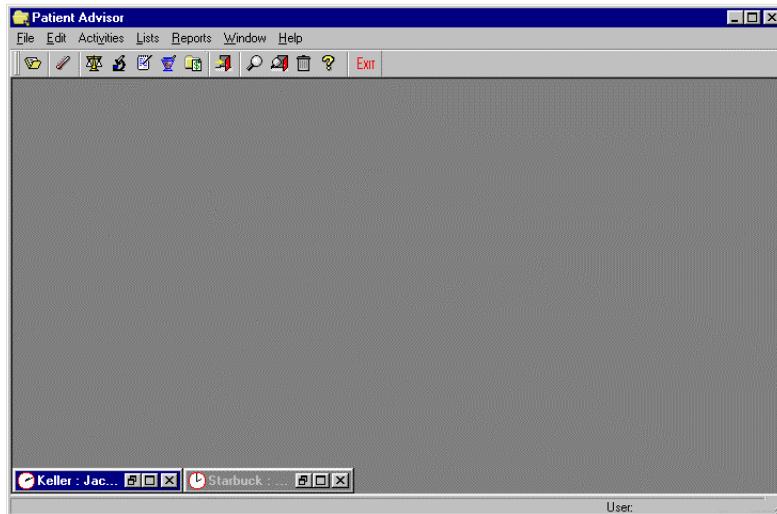
- 1 On the **File** menu, choose **Password Entry**.
- 2 In the User box, type or select your **name** or **ID**.
- 3 In the Password box, type your password. As you type your password, asterisks appear in place of the characters.
- 4 If you want to view the patient file icons for patients checked into this room, type or select the **room** in the Room box.
- 5 If you want to display patient files based on the staff member who checked the animal in, choose a staff member. In the Staff box, type or select the **staff member**.
- 6 Select **Display Patients Checked In** to have the patients checked into your practice appear as minimized icons on the workstation (based on the default).
- 7 Choose **OK**.
- 8 If you selected Display Patients Checked In, the patient files of patients who have already been checked in through Cornerstone Foundation are minimized icons in the Patient Advisor window.

Note Each subsequent time you log in, the system displays the room and staff selected previously. To change login information (room or staff), select Password Entry from the File menu.



Results

- Each workstation will default to the Login information from the prior session.
- When you login as All Staff and/or All Rooms, the files for every patient that has been checked in appear as minimized icons on the Patient Advisor window. (This is based on the default number set up in Data Defaults.)
- If you have more than one location with a workstation that has Patient Advisor, you may want to select the specific room and/or staff member assigned to that room. This way only those patients assigned to that room and/or staff member through the patient check-in appear as minimized icons on that workstation.



Minimized Patient File Icons

Benefits of the Minimized Patient Files

- Visual indication of who has been checked into the practice. The patient's name is visible in the minimized icon.
- Displays the client and patient name and the check-in time and room assignment.
- Easy double-click access to that patient's medical file.
- Easy to minimize when leaving the room. (Preventing the patient's information from being seen by other clients.)

Setting up Security

Due to its confidential nature, specific security instructions are not provided in this book. To set up security for each staff member, choose **Security Setup** on the **File** menu, and follow the instructions included separately with Cornerstone Foundation.

Two reports your clients will love

Two Reports for Client Education

One of Patient Advisor's basic premises is providing personalized, consistent information to clients. Understanding the two documents that Patient Advisor produces for client education is key to helping you complete your setup. These documents are: the **Pet Health Report Card** and the **Treatment Plan**. The information that appears on these reports can be set up from and edited in Patient Advisor Setup.

Pet Health Report Card

The Pet Health Report Card provides details of the physical exam. By following a template, the provider can systematically examine the patient. Each body system can be marked as normal, abnormal or not examined.

4/19/00	Cornerstone Animal Clinic	Page 1 of 2
Pet Health Report Card		
Client ID: 556 Gail, Abby 72199 Western Ave. Eau Claire, WI 54703 (715) 555-7219 Exam Date: 4/19/00 Staff: John M. James	Patient ID: 556 Patient Name: Starbuck Species: Canine Breed: Retriever, Golden Weight: 26 pounds Birthday: 7/3/99 Sex: Neutered Technician: Laura M. Cox	
<p>Appearance, Weight, Temperature: (Normal) Your dog is bright and friendly. It has good body conformation with normal weight and muscle mass for age and breed. Hydration (amount of fluid in the skin and other tissues) and body temperature are completely normal as well.</p> <p>Breed Predispositions: (Normal) No specific predispositions to be concerned about at this time.</p> <p>Age-Specific Concerns: (Normal) No age-specific concerns that need to be discussed at this time. Continue regular check-ups, vaccinations, flea and parasite control and a high-quality diet to optimize your pet's health.</p> <p>Behavior: (Normal) No behavioral problems were reported.</p> <p>Abdomen and Abdominal Organs: (Normal) Abdomen has a healthy conformation and is free of painful areas. The liver, bowel loops, kidneys, spleen, and lymph nodes have normal sizes, location, and consistency.</p> <p>EARS: (ABNORMAL) Ear mites observed. Should be treated as the irritation they cause can lead to more serious ear problems.</p> <p>Cardiovascular: (Normal) The heart is strong and healthy. Each heart valve sounds normal. There are no murmurs (abnormal sounds). The pulse has a normal rate and strength. The pulse has a normal regular rhythm. Capillary refill rate is rapid, indicating good peripheral circulation.</p> <p>Respiratory: (Normal) Respiration is normal. All the lung fields sound clear and healthy and your pet has a normal breathing rate and depth. The trachea (windpipe) is of normal size and sensitivity for the breed.</p> <p>Eyes: (Normal) Eyes are bright, clear, and free of discharge. The cornea, sclera, and conjunctiva are intact and healthy. The lens is transparent, and the iris has a natural color and texture. The pupils are normally responsive to light. Vision appears normal. Eyelid function and conformation is normal.</p> <p>Nervous System: (Normal) Bright and alert with a crisp, responsive mental attitude. Your pet has excellent body control, posture, balance, and</p>		
<div style="background-color: black; color: white; padding: 5px; margin-bottom: 5px;">Systems</div> <p><i>The Pet Health Report Card is organized by body systems and subsystems. Your practice can customize the preloaded systems and the order they appear.</i></p>	<div style="background-color: black; color: white; padding: 5px; margin-bottom: 5px;">Status</div> <p><i>The patient's status displays in parenthesis after the instruction heading. You can choose between normal, abnormal and did not examine.</i></p>	<div style="background-color: black; color: white; padding: 5px; margin-bottom: 5px;">Observation text</div> <p><i>Appropriate observation text will display beneath the instruction headings, based on the status entered during a physical exam. Your practice customizes pre-loaded observation information.</i></p>

Treatment Plan

Part of providing excellent medical care is recommending treatment for any abnormal findings. The Treatment Plan provides details of any diagnosis and outlines a subsequent plan for treatment.

4/19/00	Cornerstone Animal Clinic	Page 1 of 1																
Treatment Plan																		
Client ID: 556 Gail, Abby 72199 Western Ave. Eau Claire, WI 54703 (715) 555-7219 Exam Date: 4/19/00 Staff: John M. James	Patient ID: 556 Patient Name: Starbuck Species: Canine Breed: Retriever, Golden Weight: 26 pounds Birthday: 7/3/99 Sex: Neutered Technician: Laura M. Cox																	
Ear Mites																		
<p>Diagnosis Ear mites are tiny white parasites infecting the ear canals of dogs and cats. They are highly contagious frequently infesting whole litters of puppies and kittens. Severe ear infections cause injury to the ear canal. A dark, crusty material is present in the infested ear canals. Head shaking and ear scratching are common signs. Microscopic and otoscopic examination confirms the presence of ear mites.</p>																		
<p>Home Care Ear mites are contagious and all contact pets need to be treated. Ear mites are not confined to the ears and medications that are used for fleas should be sprayed on the bedding materials to prevent re-infestation. Keep the ears dry - no swimming - use a drying solution if the ears become wet or after bathing. A drying ear cleanser that creates an acid pH in the ear canal that is antibacterial and antifungal is recommended. Use this for maintenance twice weekly and after the ears become wet.</p>																		
<p>Additional Information Ear mites live and breed in the ear canals but are not confined to the ear canals. Ear mites usually cannot be controlled by ear medicine alone and topical flea shampoo is recommended every week during this treatment to kill surface mites as well.</p>																		
<p>Medications</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;">2318</td> <td style="width: 75%;">Ear Flushing</td> <td style="width: 10%; text-align: right;">1.00</td> <td style="width: 10%; text-align: right;">\$15.00</td> </tr> <tr> <td colspan="4"> Large amounts of discharge, wax and debris accompany most ear disease. This material build-up prevents medications from reaching the problem areas and may inactivate antibiotic medications. Therefore a flushing and cleaning of the ear canal prior to therapy is recommended. This procedure may require sedation if the ear canal is painful. </td> </tr> <tr> <td>2613</td> <td>Tresaderm Solution 15 ml</td> <td style="text-align: right;">1.00</td> <td style="text-align: right;">\$17.00</td> </tr> <tr> <td colspan="4"> Tresaderm is effective at killing ear mites and is also anti-inflammatory as well as antifungal. Use four drops in each ear daily for 10 days. Skip 10 days then repeat for an additional ten days. </td> </tr> </table>			2318	Ear Flushing	1.00	\$15.00	Large amounts of discharge, wax and debris accompany most ear disease. This material build-up prevents medications from reaching the problem areas and may inactivate antibiotic medications. Therefore a flushing and cleaning of the ear canal prior to therapy is recommended. This procedure may require sedation if the ear canal is painful.				2613	Tresaderm Solution 15 ml	1.00	\$17.00	Tresaderm is effective at killing ear mites and is also anti-inflammatory as well as antifungal. Use four drops in each ear daily for 10 days. Skip 10 days then repeat for an additional ten days.			
2318	Ear Flushing	1.00	\$15.00															
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2613	Tresaderm Solution 15 ml	1.00	\$17.00															
Tresaderm is effective at killing ear mites and is also anti-inflammatory as well as antifungal. Use four drops in each ear daily for 10 days. Skip 10 days then repeat for an additional ten days.																		
<p>Recheck Mites are difficult to control. Their eggs will hatch in ten days and the new mites will be killed the next application of the medication. Periodic rechecks are needed to make sure that the mites are effectively controlled. Ear flushing may also be necessary at that time.</p>																		
<p>Symptoms to be Concerned About Painful or irritated ear canals can be difficult to medicate. If the medication is not applied correctly it cannot work. If the ear is too painful for you to medicate then please call the office so that alternative medications can be administered. Shaking the head, digging at the ears with the feet, rubbing the ears on the ground or furniture are signs of perpetuating disease and need further attention.</p>																		
		Subtotal: \$32.00 Tax: \$0.00 Total: \$32.00																
<div style="background-color: black; color: white; padding: 5px; margin-bottom: 5px;">Invoice Items</div> <p><i>When you link your invoice items to the diagnostic codes, prices are included on the Treatment Plan.</i></p>	<div style="background-color: black; color: white; padding: 5px; margin-bottom: 5px;">Instruction Headers</div> <p><i>The Treatment Plan uses Instruction Headers to organize information. The order the headers appear in may be changed.</i></p>	<div style="background-color: black; color: white; padding: 5px; margin-bottom: 5px;">Treatment Info</div> <p><i>Both general treatment information and information specific to a particular invoice item can be set up to print on the Treatment Plan.</i></p>																

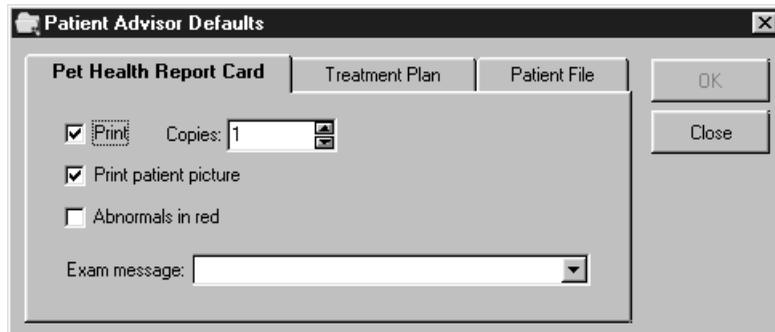
Setting up Patient Advisor Defaults

Set up the Patient Advisor defaults to preset information for the Pet Health Report Card and the Treatment Plan. These defaults can be changed when you print the Pet Health Report Card and the Treatment Plan for a patient.

To set the defaults

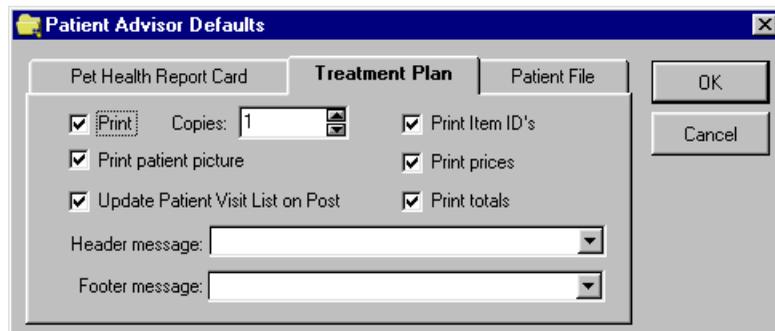
From the **File** menu, choose **Data Defaults**. The Exam Defaults dialog box appears.

- 1 On the **Pet Health Report Card** tab:



- Select the **Print** option if you want the Pet Health Report Card to automatically print (this will be the default print setting).
- Enter the default number of **copies** to print.
- Select the **Print Patient Picture** option if you want the patient's picture to print on the Pet Health Report Card.
- Select the **Abnormals in Red** option if you have a color printer and want the abnormal observation headings to print in red.
- Enter the **Exam Message** to print on the Pet Health Report Card. Use the drop-down list box to choose from existing messages. (Messages are set up in Cornerstone Foundation through Billing Messages on the Controls menu.)

- 2 On the **Treatment Plan** tab:

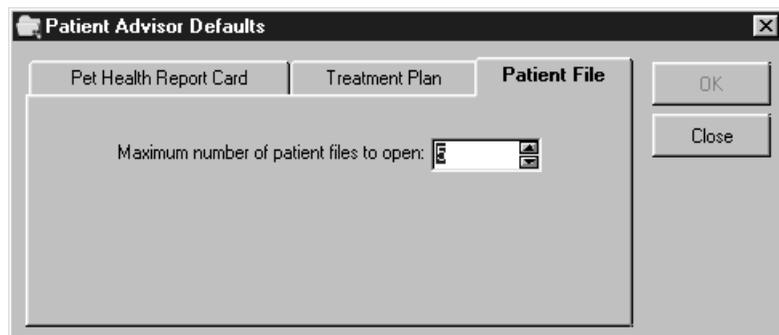


- Select the **Print** option if you want the Treatment Plan to automatically print (this will be the default print setting).
- Enter the default number of **copies** to print.
- Select the **Print Patient Picture** option if you want the patient's picture to print on the Treatment Plan.
- If you want to transfer items to the Patient Visit List only after you post an exam, select **Update Patient Visit List on Post**. If you do not select this option, items are transferred to the Patient Visit List when you save an exam.

Note Posted exams cannot be changed; saved exams can be changed.

- Select the **Print Item ID's** option if you want to print your practice's invoice item IDs on the Treatment Plan. Do not select this option if you want to keep your practice's item IDs confidential.
- Select **Print Prices** if you want prices to print on the Treatment Plan.
- Select **Print Totals** if you want totals to print on the Treatment Plan.
- Enter the **Header and Footer message**, as desired. These default messages will print on the top and bottom of the Treatment Plan. If necessary, you can change the messages when you print the Treatment Plan.

3 On the **Patient File** tab:



- Enter the maximum number of patient files you want to appear as minimized icons in the Patient Advisor window. There is a minimized icon for each patient checked into the practice.

4 Choose **OK**.

Customizing Patient Advisor

Introduction

Patient Advisor includes preprogrammed information, however, you should customize this information to reflect how *you* practice veterinary medicine in your practice. Patient Advisor uses the standard body systems and subsystems and associates observations, diagnoses, and instructions to these standards. Although you set up customized medical information, you can still modify specific information as you conduct the physical exam.

All of this medical information appears in the Patient Advisor Setup, the heart of the Patient Advisor. Customize the medical information through the Lists menu.

Important Before you begin using Patient Advisor, read this manual *and* the preprogrammed information included in the Patient Advisor software. Use the instructions in this manual to add or change the information to meet your practice's specific needs.

We are *not* responsible for patient liability with respect to the use of any information contained within Patient Advisor. Your use of the Patient Advisor software is subject to the express terms and conditions of the written license agreement by and between VetConnect Systems, Inc. and you.

Before you begin

- Install the Upload program to utilize the preprogrammed information. Refer to page 7 for information on installing the Upload program.
- Print the Instruction Templates Report to see what is currently set up in the Patient Advisor and what you need to change for your practice. Because this report is so large, it can take several hours to print. We recommend that you print the report for one system, subsystem or diagnosis.

Linked vs. Non-linked Invoice Item IDs

The preprogrammed information installed by Patient Advisor includes recommended treatment items and instructions contained in the various treatment templates. To use the treatment items, you will need to assign the appropriate invoice item ID to each treatment item to reflect your practice's invoice item structure.

It is not necessary to set up all the recommended treatment items prior to using Patient Advisor.

Why should I link my invoice item IDs to the treatment items?

There are some advantages to linking your invoice item IDs.

- Patient Advisor will list your practice's prices for services on the Treatment Plan and will also include a total amount.
- Patient Advisor will automatically transfer your charges to the Patient Visit List. From the Patient Visit List, charges can be transferred to an invoice in Cornerstone.

You may choose to use Patient Advisor for a while before linking your invoice item IDs. It will allow you to become familiar with the software and then you can decide which items should be included in specific systems.

To link invoice items through the Patient Advisor Setup

From the **Lists** menu, select **Patient Advisor Setup**. Use the Patient Advisor Setup to view the existing information. You can add your IDs to the items as you discover unidentified items.

Note A diagnosis must be marked as linked before any linked item IDs will display price information and print on the Treatment Plan.

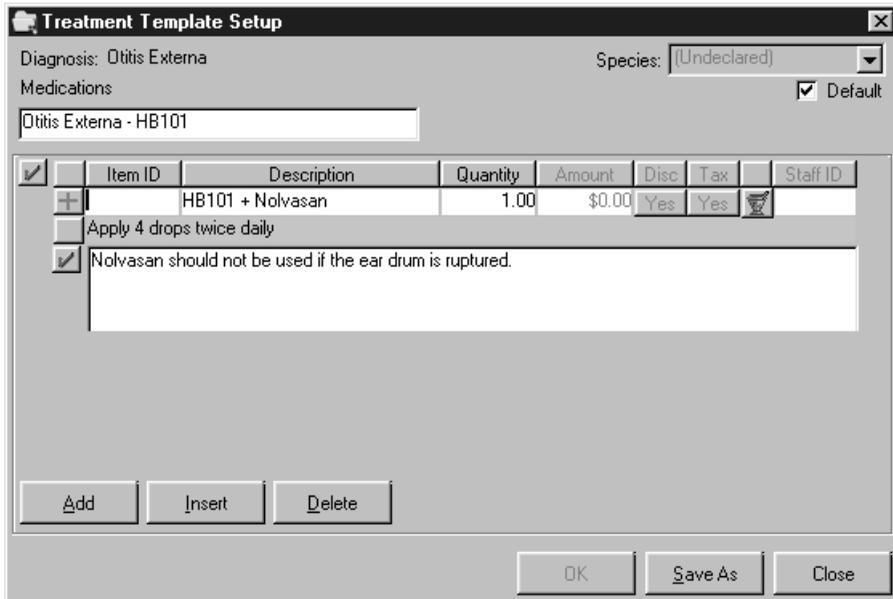
Use **F2** to locate your item's ID. If an item does not exist, it can be created in Cornerstone Foundation or another item can be chosen from your invoice item list. You can also delete any of the invoice items or instructions that you do not want to appear in the recommended treatments. Deselect the green check mark of any item you do not want to print on the Treatment Plan.

To link invoice items through the Physical Exam

You can also add IDs during a Physical Exam. From the **Activities** menu, select **Physical Exam**. You will be prompted to insert your ID if you try to leave the dialog box without entering the ID. Choose **OK** to return to the Physical Exam and enter your item ID.

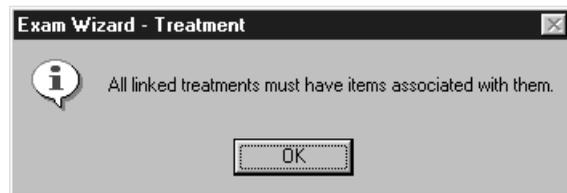
Note A diagnosis must be marked as linked before any linked item IDs will display price information and print on the Treatment Plan.

Use **F2** to locate your item's ID. If an item does not exist, it can be created in Cornerstone Foundation or another item can be chosen from your invoice item list. You can also delete any of the invoice items or instructions that you do not want to appear in the recommended treatments. Deselect the green check mark of any item you do not want to print on the Treatment Plan.



This treatment needs an item ID associated with it. Use F2 to locate your invoice item ID.

If you try to leave the Exam Wizard - Treatment dialog box without updating the item IDs, this warning will display. Choose OK to return to the dialog and add the item IDs. Be sure to scroll down through the dialog box, if necessary, to change additional item IDs. This message could appear more than once, if all treatment item IDs are not updated.



Updating matching codes feature

When a user is completing a physical exam and enters an invoice item code in a blank item ID field, the system will prompt users with appropriate security access to update all templates with the same description with this same invoice item. This feature prevents staff members from accidentally updating invoice items.

*If you have appropriate security access, you will then be asked if you want to update all instances of the item with the item ID you chose. Choose **Yes** to update all treatment templates that contain the recommended item or choose **No** to update only this item on this exam.*

For information on changing your security, please contact Cornerstone support.

Related topics

Setting up Treatment Templates

Page 34

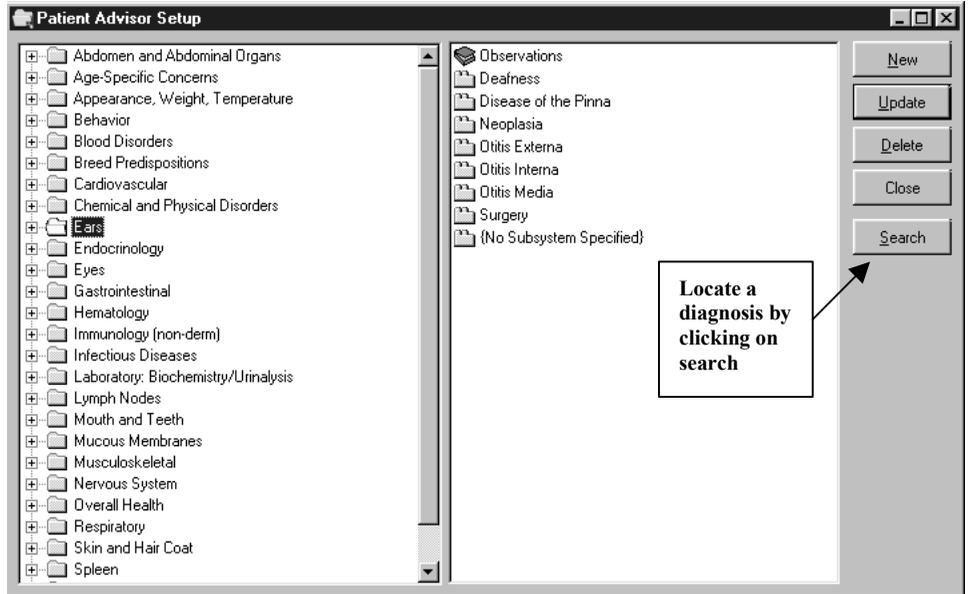
Updating Treatment Templates

Page 41

Introduction to the Information included in Patient Advisor Setup

All of the preprogrammed information in Patient Advisor can be viewed and edited through Patient Advisor Setup (on the **Lists** menu). This window looks and works a lot like Windows Explorer. Like Windows Explorer, the components in Patient Advisor Setup are organized in a hierarchical structure or "tree."

The observations for the Pet Health Report Card and the instructions for the Treatment Plan are organized under systems and subsystems.



The window is divided into two panes. The left pane (or *All Folders* pane) displays all of the body systems in Patient Advisor. Contained within these systems are subsystems, observations, diagnostic codes and instructions. As you click a file in the left pane, the right pane (or *Contents* pane) displays the items associated with the highlighted file.

You can double-click an item to open it.

A plus sign (+) to the left of an icon indicates there are additional items associated with that item. When you click the plus sign, the items within that component appear in the left pane.

The information in Patient Advisor Setup includes:

 **Systems** *Systems*, designated by the file folder icon, are the highest (or most general) level of diagnoses. Patient Advisor comes preprogrammed with the major body systems examined during a patient exam. See page 28.

 **Subsystems** *Subsystems*, designated by the icon of a file folder with two tabs, further classify system disorders. Several subsystems are included with the Patient Advisor. See page 28.

 **Observations** *Observations*, designated by a book icon, are the symptoms you look for in a normal or abnormal situation. Each system includes *Normal*, *Did Not Examine* and *Abnormal* observations. Observations print on the Pet Health Report Card. See page 30.

 **Species-specific Observations** *Species-specific Observations*, designated by the dog icon within an observation type, contain observation text for a specific species. See page 30.

 **Observation text** *Observation text*, indicated by the single paper icon within an observation type, are specific abnormal or normal conditions. See page 30.

 **Diagnostic Codes** Each subsystem contains *Diagnostic Codes*, designated by the microscope icon. A diagnostic code can also be linked to an undeclared subsystem. Each diagnostic code has an ID, a VPI description, hospital description, default status (tentative, final or ruled out), status (active or inactive), enabled option, linked option and send reminders option. You can associate specific instructions and treatments (with their treatment instructions) with each diagnostic code. See page 25.

 **Instruction Headers** *Instruction Headers*, designated by the multiple papers icon, are linked to specific diagnostic codes. These headings (with the instruction text from the associated treatment template) print on the Treatment Plan. See page 23.

 **Treatment Templates** *Treatment Templates*, designated by the single paper icon, appear under instruction headers. These templates may contain instruction text, treatments and treatment instructions. See page 34.

 **Species-specific Treatment Templates** *Species-specific Treatment Templates*, indicated by the dog icon, contain treatment templates for a specific species. See page 34.

Setting up the Instruction Header List

Basically, instructions headers are categories on the Treatment Plan. Patient Advisor uses Instruction Headers to:

- Organize Patient Advisor Setup instruction information and treatments.
- Determine which, and in what order, information prints on the Treatment Plan.

While instruction headers appear in alphabetical order in the Instruction Header List, the headers (and instructions) appear in Patient Advisor Setup and print on the Treatment Plan based on the order assigned in the Instruction Header Order Setup.

Diagnosis

Severe itching and scratching of the ears and head area, with excessive black wax. Microscopic and otoscopic examination confirms the presence of ear mites. Therapeutic cleaning and medications administered.

Symptoms to be Concerned About

Painful or irritated ear canals can be difficult to medicate. If the medication is not applied correctly it cannot work. Shaking the head, digging at the ears with the feet, rubbing the ears on the ground and furniture are signs of perpetuating disease and need further attention.

Diagnostic Plans

2043	EAR SWAB	1.00	\$18.00
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The ear material can be removed on a swab. This is then applied to a microscope slide and stained. In addition debris from the ear is mixed with mineral oil to loosen and disperse mites from the material. Microscopic examination will reveal any organisms or disease.

Therapeutic Plans

5089	Tresaderm 15 ml	1.00	\$17.25
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Tresaderm is effective at killing ear mites and is also anti-inflammatory as well as anti-fungal. Use four drops in each ear daily for 10 days. Skip 10 days then repeat for an additional ten days.

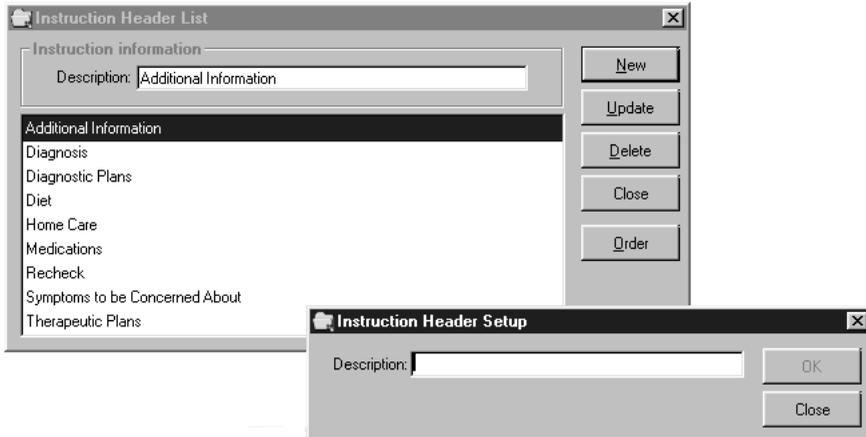
Example of the Treatment Plan. Instruction headers are in bold text.

To add an instruction header to the list

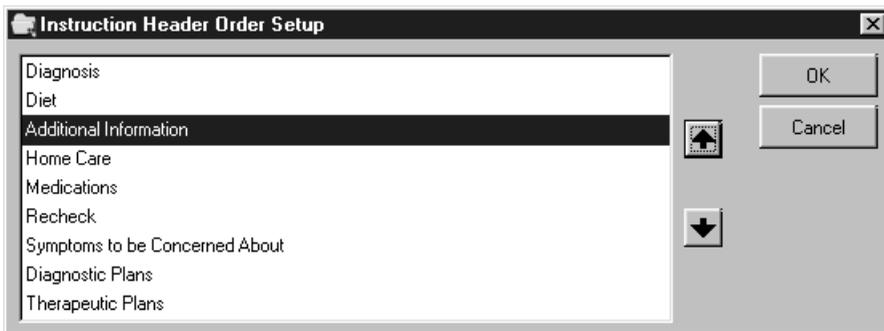
- 1 From the **Lists** menu, choose **Instruction Headers**.
- 2 Choose **New** on the Instruction Header List. The Instruction Header Setup dialog box appears.
- 3 In the Description box, type the instruction header as you want it to appear on the Treatment Plan.
- 4 Choose **OK**.

To change the order instruction headers appear in the Treatment Plan

- 1 Choose **Order** on the Instruction Header List. The Instruction Header Order Setup dialog box appears.
- 2 Click the instruction header to move and click the up or down arrow to change the order of the highlighted instruction.
- 3 Repeat step **2** to change the order of another instruction header or choose **OK**.



Add a new Instruction Header by choosing New. Type the Instruction Header description and choose OK.



Change the order the instructions print on the Treatment Plan and appear in the Patient Advisor Setup by using the up and down arrows.

Results

- When you print Treatment Plans, the instruction headers appear above each section of information.
- The instruction headers appear under each diagnostic code in the Patient Advisor Setup.

Related topics

Printing Treatment Plans

Page 81

Updating Systems, Subsystems, Observations and Diagnostic Codes

Page 32

Setting up Diagnostic Codes

Patient Advisor uses *Diagnostic Codes* to identify diagnoses, generate Treatment Plans and recommend treatments.

Note You can also set up diagnostic codes in Cornerstone Foundation and from the Patient Advisor Setup window.

Timesaver

Use the Diagnostic Codes List if you are adding or updating several diagnostic codes. If you are adding or updating a few specific diagnostic codes, it may be easier to use the Patient Advisor Setup window.

To open the Diagnostic Codes List

On the **Lists** menu, choose **Diagnostic Codes**. You can narrow the list of diagnostic codes which appear by selecting a specific **System** or **Subsystem**.

To open the Patient Advisor Setup window



On the **Lists** menu, choose **Patient Advisor Setup**. Click a diagnostic code (designated by the microscope icon) in the applicable body system or subsystem.

To add a Diagnostic Code

- 1 Choose **New**. The Diagnostic Code Setup dialog box appears.
- 2 Type the diagnostic code. The code must begin with a letter and is limited to five (5) characters.
- 3 In the **Hospital Desc.** box, type the hospital description.
- 4 Select the **Default Status** as Tentative or Final. (You can change the diagnosis status when you use this diagnostic code.)

Note Do *not* change the status of the code to inactive. You cannot use an inactive diagnostic code for a diagnoses.

- 5 Select the **System** and/or **Subsystem** relating to this diagnostic code from the appropriate drop-down lists, if applicable.
- 6 Select the **Enabled** check box to use this diagnostic code during a physical exam.

Note A diagnostic code is disabled and cannot be used for a patient exam until the practice has approved it by selecting the Enabled check box.

- 7 Select the **Linked** check box to associate this diagnostic code with invoice items used by your practice.

Note If the Linked check box is selected, the invoice items entered in Patient Advisor Setup will be transferred to the Patient Visit List when this diagnostic code is used.

- 8 Select the **Send Reminders** check box to flag the diagnosis in the physical exam. You will be able to send reminders to patients with this diagnostic code in their Patient File.
- 9 If you chose to enable this diagnostic code, but did not link it, you will want to utilize the **Exam Message** field. The content of this field prints on Patient Advisor reports. You can put an estimate range in this field.

Note Only one exam message can print on the report. If you select two or more diagnostic codes, a pop-up box will display any applicable exam messages. Choose the most appropriate message to print.

- 10 Choose **OK**.

Diagnostic Code Setup

Diagnostic code information

Diagnostic code: 06

VPI description: BSP

Hospital desc: BSP

Default status: Tentative

Status: Active

Patient Advisor settings

System: Laboratory: Biochemistry/Urinalysis

Subsystem: [Undeclared]

Enabled

Linked

Send reminders

Exam Message:

OK

Cancel

Results

- The diagnostic code will be inserted into the Patient Advisor Setup linked to the coinciding system/subsystem and can be used in the Physical Exam or the Patient File.
- The diagnostic codes with the **Send Reminders** option checked will be flagged diagnostic codes. When you want to send reminders based on diagnostic codes, you can generate the reminder report based on All Diagnoses or Flagged Diagnoses.

Related topics

Updating Systems, Subsystems, Observations and Diagnostic Codes Page 32

Deleting Systems, Subsystems, Observations and Diagnostic Codes
Page 33

Introduction to the Physical Exam Page 45

Generating Diagnostic Reminders Page 86



For more information on diagnostic codes, please refer to "Setting up Diagnostic Codes" in the chapter CORNERSTONE LISTS in the *Cornerstone Reference Manual*.

Setting up Systems and Subsystems



Systems, designated by the file folder icon, are the highest (or most general) level of diagnoses. Patient Advisor comes preprogrammed with the major body systems examined during a patient exam.



Subsystems, designated by the icon of a file folder with two tabs, further classify system disorders. Several subsystems are included with Patient Advisor.

To add a System

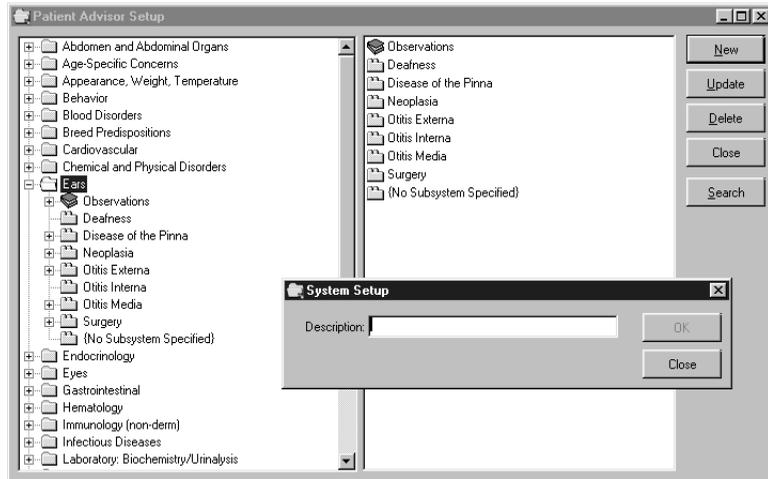
- 1 On the **Lists** menu, choose **Patient Advisor Setup**.
- 2 Click an existing system or {No System Specified} and choose **New**.
- 3 In the **Description** box, type the system description.
- 4 Choose **OK**. The system will be inserted alphabetically.

Note So that the information you gather stays consistent, when you create a new system, Patient Advisor automatically creates Normal, Did Not Examine, and Abnormal categories, and a Subsystem file {No Subsystem Specified} which contains a {No Diagnoses Specified} diagnosis.

A system can only be deleted if no information has been linked to the system and it has never been used in a patient's file.

To add a Subsystem

- 1 Click an existing subsystem or {No Subsystem Specified} and choose **New**.
- 2 The current information for the system displays. You can modify as necessary.
- 3 In the **Description** box, type the subsystem description.
- 4 Choose **OK**. The subsystem will be inserted underneath the coinciding system.



Locating a diagnosis in Patient Advisor Setup

- 1 In the Patient Advisor Setup window, click **Search**. The Diagnostic Codes dialog box appears.
- 2 Choose the desired diagnosis and choose **Select**.
- 3 The Patient Advisor Setup window returns with the focus on the appropriate system expanded and the diagnosis highlighted.

For more information on searches, see the section "The Find Tool:F2" in your *Cornerstone Reference Manual*.

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Setting up Treatment Templates	Page 34
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Setting up Observations



Observations, designated by a book icon, are the symptoms you look for in a normal or abnormal situation. Each system includes *Normal*, *Did Not Examine* and *Abnormal* observations. Observations print on the Pet Health Report Card.

Species-specific Observations, designated by the dog icon within an observation type, contain observation text for a specific species.

Observation text, indicated by the single paper icon within an observation type, are undeclared species abnormal or normal conditions.

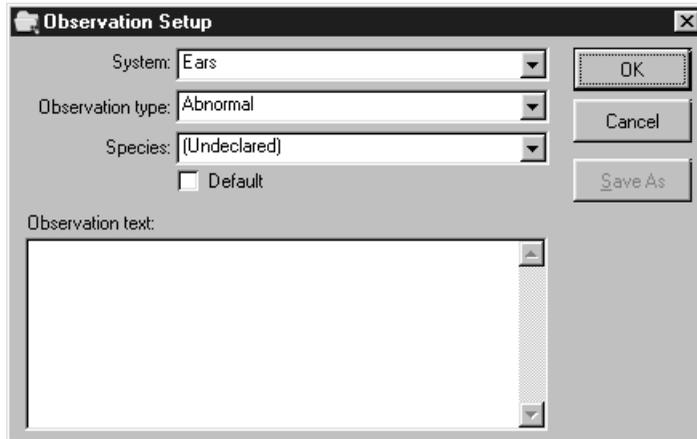
Observations may be up to 4000 characters. Only the first 245 characters display in the observation screen. If more than 245 characters are included, they will be followed by ellipses (...). To view the entire observation, highlight the desired observation, right-click and select **Update**.

To add an Observation

- 1 On the **Lists** menu, choose **Patient Advisor Setup**. Click to select the appropriate body system. Double-click on the observation icon.
- 2 Click the Normal or Abnormal observation in the system and choose **New**. The Observation Setup dialog box appears with the current system and observation type entered. Modify if necessary.
- 3 If this observation is specific to a species, select the species from the drop-down list next to the **Species** box.
- 4 If you want this observation to be the default observation for this system and observation status in the physical exam, click the **Default** check box.

Note There must be one default observation for each system and each species-specific observation or the system will not appear on the Physical Exam.

- 5 In the Observation Text box, type the symptoms you would observe in this situation.
- 6 Choose **OK**. The observation will be inserted underneath the coinciding system and observation type on the Patient Advisor List.



Results

- The observation status and observation text appears on the Physical Exam dialog box.
- When an observation is chosen in the Physical Exam, the system will first search for a species/type-specific observation, then a type-specific observation, then species-specific observation, and finally a general observation.

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Updating Systems, Subsystems, Observations and Diagnostic Codes

Important Before you begin using the Patient Advisor, read this manual *and* the preprogrammed information included in the Patient Advisor software. Use these instructions to update the information to meet your practice's specific needs.

We are *not* responsible for patient liability with respect to the use of any information contained in Patient Advisor.

Before you begin

Print the Instruction Templates Report to see what is currently set up in Patient Advisor and what you need to change for your practice.

Because this report is so large, it can take several hours to print. We recommend that you print the report for one system, subsystem or diagnosis.

To update a system, subsystem, observation, or diagnostic code

- 1 From the **Lists** menu, choose **Patient Advisor Setup**.
- 2 Click the item you want to change and click **Update**. The item's set up dialog box appears.
- 3 Modify or update the information as necessary and choose **OK**.
- 4 Repeat steps **2 - 3**.

Or choose **OK** to close the Patient Advisor Setup window.

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Deleting Systems, Subsystems, Observations and Diagnostic Codes

When you create a system, a generic subsystem {No Subsystem Specified}, a generic diagnostic code {No Diagnoses Specified} and observations (Normal, Abnormal, and Did Not Examine) are automatically created. The generic items cannot be deleted, but will automatically be deleted with the system.

An observation and/or diagnostic code cannot be deleted if it has been used in a patient's file or on a Physical Exam.

To delete a system, all subsystems, observations and diagnostic codes (except the generic items) must be deleted first.

To delete a system, subsystem, observation, or diagnostic code

- 1 Select the item to delete.
- 2 Choose **Delete**. A message appears asking you to confirm your decision.
- 3 Choose **OK**.

Setting up Treatment Templates

Treatment templates display under instruction headers in Patient Advisor Setup and are used by Patient Advisor during the Physical Exam. Treatment templates include:

- General information about the diagnosis
- Invoice items to dispense or services to perform
- Information specific to included invoice items or services.



Treatment templates, designated by the paper icon in the Patient Advisor Setup window, print below the instruction header on the Treatment Plan. For each instruction heading you can include text about the diagnosis. This text might include home care instructions, medicinal information or special care instructions.

Before you begin

Before you begin adding or updating treatment information or invoice items within a diagnostic code, you must set up the instruction headers and diagnostic codes. See "Setting up the Instruction Header Lists" on page 23 and "Setting up the Diagnostic Codes Lists" on page 25.

To add general information on a new Treatment Template

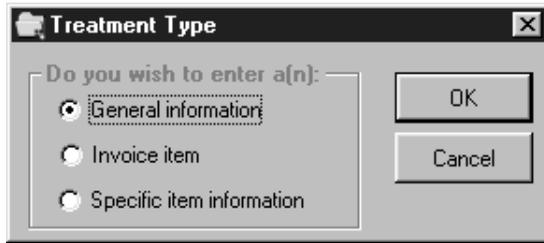


- 1 On the **Lists** menu, choose **Patient Advisor Setup**. Select the system, subsystem and click on the appropriate diagnosis. Under the applicable diagnostic code, click the instruction heading (designated by the multiple papers icon) that applies to this instruction and choose **New**. The Treatment Templates Setup dialog box appears.
- 2 Type a detailed description of this treatment template. This description appears in the drop-down list in the Exam Wizard-Treatments dialog box, but does not print on client reports.
- 3 Select a **Species** if this instruction only applies to a specific species.
- 4 Select the **Default** check box to use this treatment template as the default within this header (or group of species-specific templates) for this diagnosis. (At least one treatment template must be a default or the system will not automatically appear on the Physical Exam. A treatment template can still be selected from the drop-down list in the Exam Wizard-Treatments dialog box.)

Note If you select the Default check box, *this* treatment template becomes the default and Patient Advisor clears the Default check box of the previous default template for each species.

Adding information places it at the bottom of the template.

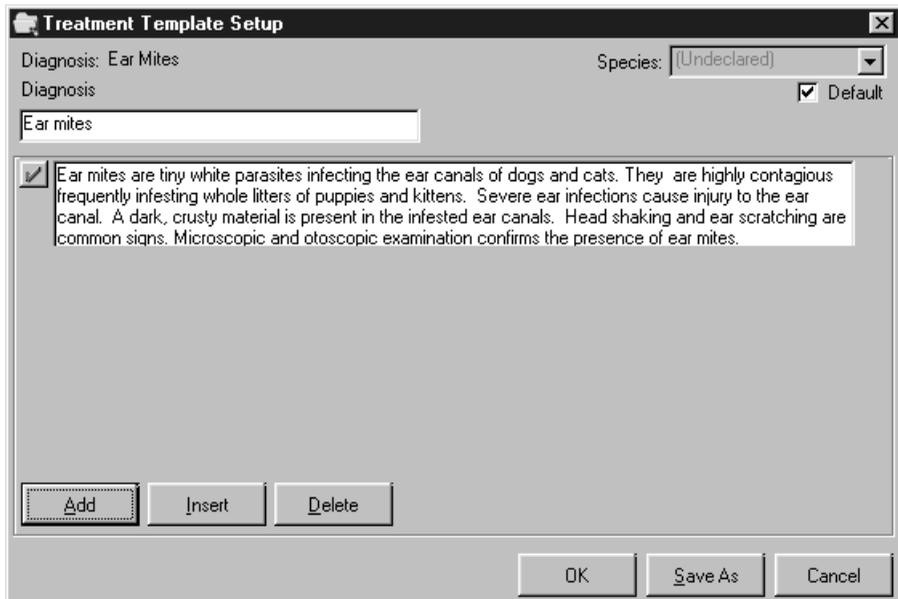
- 5 Click the **Add** button. The Treatment Type dialog box appears.



Sample Treatment Type dialog box

- 6 Specify **General Information** to add text about this diagnosis and choose **OK**. A text box appears in the Treatment Template Setup dialog box.
 - 7 Type the information in the box.
 - 8 The check mark must appear beside information in order for it to print on the Treatment Plan.
 - 9 Repeat steps 5 - 8 to add additional information.
- Or Choose **OK**.

Begin typing when the blinking cursor appears in the box.



Adding information will place a text box in the dialog box. Use this feature to communicate information to the client that is important to their pet's health, such as home care instructions, symptoms to watch for, drug interactions or bandage care.

To add an invoice item to a new Treatment Template

You can add invoice items to dispense or services to perform on a patient to a Treatment Template. The invoice items or services (also called treatments) are transferred to the Patient Visit List where you can transfer the items to the invoice (through Cornerstone Foundation).

- 1 On the **Lists** menu, choose **Patient Advisor Setup**. Select the system, subsystem and click on the appropriate diagnosis. Under the applicable diagnostic code, click the instruction heading that applies to this instruction and choose **New**. The Treatment Template Setup dialog box appears.
- 2 Type a detailed description of this treatment template. This description appears in the drop-down list in the Exam Wizard-Treatments dialog box.
- 3 Select a **Species** from the drop-down list if this instruction only applies to a specific species.
- 4 Select the **Default** check box to use this treatment template as the default within this header (or group of species-specific templates) for this diagnosis. (At least one treatment template must be a default or the system will not automatically appear on the Physical Exam. A different treatment template can still be selected from the drop-down list in the Exam Wizard-Treatments dialog box.)

Note If you select the Default check box, *this* treatment template becomes the default and Patient Advisor clears the Default check box of the previous default template.

- 5 Click the **Add** button. The Treatment Type dialog box appears.
- 6 Specify **Invoice Item** and choose **OK**. A treatment item row appears in the Treatment Template Setup dialog box.

Note You may not receive the Treatment Type dialog box. For example, if your cursor is currently located on information specific to an item and you choose Insert, the appropriate box automatically appears.

Enter an item as you would enter an item in the invoice.

- 7 Select an **item ID**. The description appears. Use **F2** to search for an item ID.
 - 8 Type the quantity of the item. The amount (price) updates.
 - 9 You can type an item note in the blue box below the item row, if necessary. This note appears in the treatment template and Patient Visit List only. It will not print on the Treatment Plan or appear in the Patient File.
 - 10 A check mark must appear beside any general information or invoice item in order for it to print on the Treatment Plan.
 - 11 Repeat steps **5 - 9** to add another invoice item.
- Or* Choose **OK**.

Treatment Template Setup

Diagnosis: Ear Mites Species: [Undeclared]

Medications Default

Flushing of ears / Tresaderm

Large amounts of discharge, wax and debris accompany most ear disease. This material build-up prevents medications from reaching the problem areas and may inactivate antibiotic medications. Therefore a flushing and cleaning of the ear canal prior to therapy is recommended. This procedure may require sedation if the ear canal is painful.

<input checked="" type="checkbox"/>	Item ID	Description	Quantity	Amount	Disc	Tax	Staff ID
<input checked="" type="checkbox"/>	2613	Tresaderm Solution 15 ml	1.00	\$17.00	Yes	Yes	

Tresaderm is effective at killing ear mites and is also anti-inflammatory as well as antifungal. Use four drops in each ear daily for 10 days. Skip 10 days then repeat for an additional ten days.

Add Insert Delete

OK Save As Cancel

In this example, the Instruction Header is Medications. We have chosen to add an invoice item. The check marks indicate the information will print on the Treatment Plan. Use the invoice items to indicate services, such as Ear Flush, or medications such as Tresaderm that need to be included in the treatment for this diagnosis. The treatment items appear in the Patient Visit List so they can be transferred to an invoice.

To add specific item information to a new Treatment Template

Specific Item Information applies directly to a particular invoice item and appears on the Treatment Plan. You must add the invoice item before adding the item specific information.

- 1 In the **Patient Advisor Setup** window, click the treatment template to add the treatment instruction to and choose **New**. The Treatment Templates Setup dialog box appears. Click the invoice item that the information applies to and then click the **Add** button. The Treatment Type dialog box appears.

Note You may not receive the Treatment Type dialog box. For example, if your cursor is currently located on information specific to an item and you choose Insert, the appropriate box automatically appears.

- 2 Specify **Specific Item Information** and choose **OK**. An item information box appears below the treatment.
- 3 Type the information pertaining to the invoice item. A check mark must appear beside the information in order for it to print on the Treatment Plan.
- 4 Repeat steps **1 - 3** to add information on a different invoice item.
*Or Choose **OK**.*

Note When a specific item information is deleted, the item itself will remain. If an invoice item is deleted, the specific item information will be deleted also.

In this example, the Instruction Heading is Medications.

We have chosen to Add Specific Item Information. This option is used to communicate specific information about the above item, such as allergic reactions to drugs, specific care instructions, or encouragement to return for a recheck.

<input checked="" type="checkbox"/>	Item ID	Description	Quantity	Amount	Disc	Tax	Staff ID
<input checked="" type="checkbox"/>	+	HB101 + Nolvasan	1.00	\$0.00	Yes	Yes	
<input checked="" type="checkbox"/>		Apply 4 drops twice daily					

Results

- General information will print on the Treatment Plan under the instruction header.
- The system selects the species specific treatment first (if available), then the general treatment on the Physical Exam.
- The treatment items are transferred to the patient visit list when a Physical Exam is completed.

To insert general information, invoice items or specific item information

Inserting information will place it between items in the template.

- 1 Click the instruction or treatment located *below* where you want to insert a new instruction and then click the **Insert** button. The Treatment Type dialog box appears.
- 2 Select the type of information to insert and choose **OK**.
- 3 Complete the information in the box or row that appears.

Treatment status buttons

All invoice items are transferred to the Patient Visit List. The treatment status button (the plus sign next to the treatment item) is used to indicate the status of the item for this patient. The plus sign is the default and can be modified during the exam.

Click on the button to change it to a different status.

The  indicates the item was recommended to the client.

The  indicates the item's recommendation was accepted by the client.

Note Don't confuse this check mark with the check mark in the left margin that determines if the line prints on the Treatment Plan.

The  indicates the item was performed on the patient and should be included on the invoice.

The  indicates the item or service was declined by the client.

The  indicates the item or service was declined by the client and you want it to appear in the patient's history.

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Updating Systems, Subsystems, Observations and Diagnostic Codes	Page 32
Deleting Systems, Subsystems, Observations and Diagnostic Codes	Page 33
Introduction to the Physical Exam	Page 45
The Patient Visit List	Page 81

Updating Treatment Templates

After saving a treatment template, you can:

- Add, update or delete general information, invoice items or specific information about invoice items.

Before you begin

Print the Instruction Templates Report to see what is currently set up in the Patient Advisor and identify what you need to change.

Because this report is so large, it can take several hours to print. We recommend that you print the report for one system, subsystem or diagnosis.

To open the Treatment Template

- 1 Open the Patient Advisor Setup window. (On the **Lists** menu, choose **Patient Advisor Setup**.)
- 2 Select the System, Subsystem, Diagnosis and Instruction Header.
- 3 Click the treatment template to open and choose **Update**. The Treatment Templates Setup dialog box appears.

To update general information, invoice items, or information specific to invoice items

- 1 Click the information or invoice item to change.
- 2 The preprogrammed information will not contain an item ID. Press **F2** to locate your invoice item that matches the treatment to link your item ID. (If the invoice item does not exist in your database, you can add it through Cornerstone Foundation or choose another item.) You cannot continue through this screen without linking the item ID, unless the diagnosis is not marked as linked.
- 3 Modify the information as necessary.
- 4 Choose **OK**.

See "Linked vs. Non-linked Invoice Item IDs" on page 18.

To delete general information or an invoice item

- 1 Click the information or invoice item to delete.
- 2 Choose **Delete**.

Related Topics

Updating Systems, Subsystems, Observations and Diagnostic Codes	Page 32
Setting up System Templates	Page 43
Setting up Treatment Templates	Page 34
Deleting Systems, Subsystems, Observations and Diagnostic Codes	Page 33
Introduction to the Physical Exam	Page 45

Setting up System Templates

Patient Advisor uses *System Templates* to determine how to structure the Physical Exam. In Cornerstone Foundation, the **Species** option (found on the **Lists** menu), allows you to link a species to a system template. This system template will be used in Patient Advisor when that species is examined.

For more information, see "Setting up Species and Breeds" in the *Cornerstone Reference Manual*.

Mark the system template to use for the majority of your physical exams as the default. This template includes:

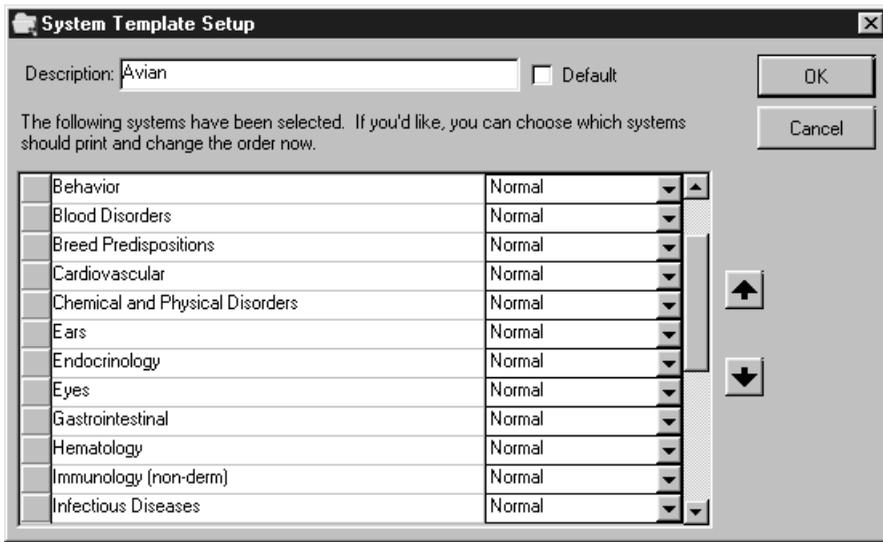
- The systems to appear in the Physical Exam dialog box.
- The systems to print on the Pet Health Report Card and the order they appear.
- The default observation status (normal, abnormal or did not examine) that appears on the Physical Exam dialog box.

This allows you to customize the Physical Exam on the systems you examine most for each species.

To add a System Template

- 1 From the **Lists** menu, choose **System Templates**.
- 2 Choose **New**. The System Template Setup dialog box appears.
- 3 In the Description box, type a description for this system template.
- 4 Select the **Default** check box if you want to use this template for the majority of your physical exams. You can only have one default template per species. (If another template is marked as default, selecting the default check box here will deselect the other template.)
This template will display by default in a Physical Exam, but you can choose a different template when using the Physical Exam.
- 5 Select the **systems** to include in this exam template. To include a system, click the box to the left of the system to make the check mark appear. (Click the check mark to remove the system from the exam template.)
- 6 Select a default observation status for this system: Normal, Abnormal or Did Not Examine.
- 7 Order the systems as you want them to appear in the Physical Exam and on the Pet Health Report Card. To move a system, click the system and then click the arrow key to move the system up or down in the sequence.
- 8 Choose **OK**.

The text of the selected system is green.



Related topics

Introduction to the Physical Exam

Page 45

Introduction to the Physical Exam

Overview

The Patient File and the Physical Exam work together to make entering and changing information easy.

Use the minimized icons of the Patient File to know which patients are checked into the practice and are waiting to be seen. Use the Patient File to view the patient's medical history and add pertinent information during the exam. From the Patient File you can continue with a diagnosis through the Physical Exam and the Exam Wizard. The wizard creates an outline that will provide a consistent standard of care and creates the personalized Treatment Plan and Pet Health Report Card for the patient.

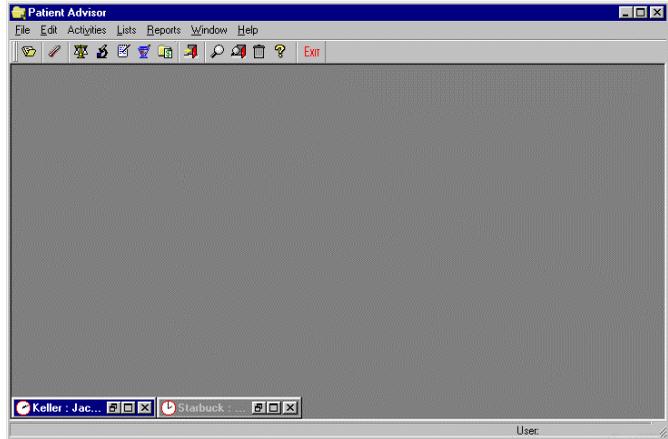
At any time during a diagnosis through the Physical Exam, you can choose to go directly to the end. For instance, if it's a procedure you perform on a regular basis and you know the treatment information is correct and does not need any editing, you can choose Finish to return to the Physical Exam dialog box and save, post or print the Pet Health Report Card and Treatment Plan.

On the following pages you will find a representation of a typical routine using Patient Advisor.

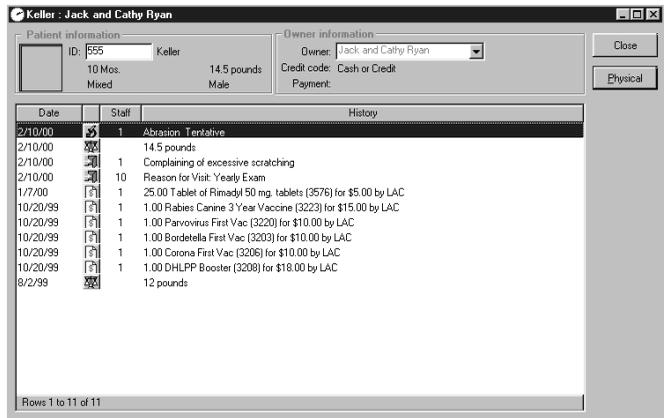
Before you begin

- One observation text for each status (under each system) must be marked as a default in order for observation text to appear in the Physical Exam.
- One treatment template for each instruction header (under each diagnosis) must be marked as a default in order for the treatment template to appear in the Physical Exam.

1. Click the Patient File icon to view a patient's medical history or click on the desired checked-in patient. Checked-in patients' records are minimized at the bottom of the screen. Click on the square button to restore the record to full size.

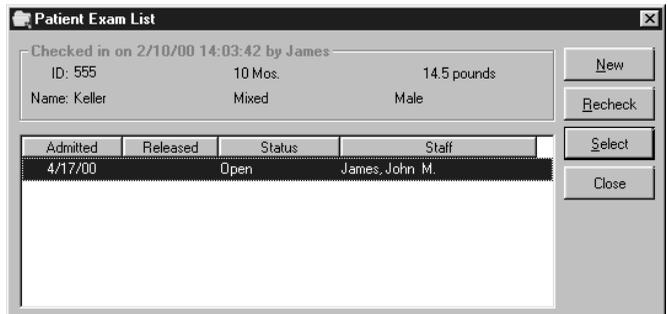


2. From the Patient File you can view the history of the patient. Choose Physical to continue through the Physical Exam.



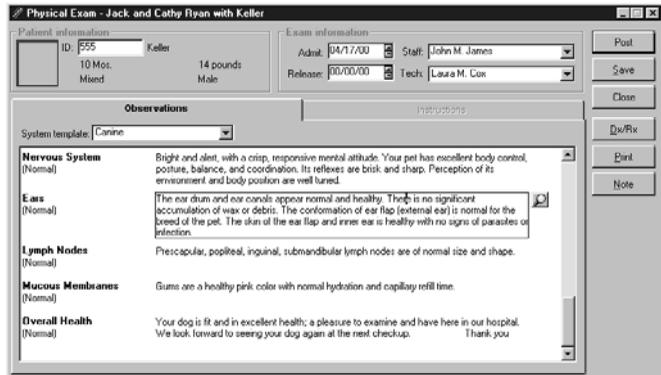
3. Choose New to perform a new exam or select a previous exam from the list and choose Select or Recheck. If the patient has been checked into the hospital, it will be indicated here also.

NOTE: If the patient is checked in, the check-in information appears above the patient information. If the patient is not checked in, this information will not appear.

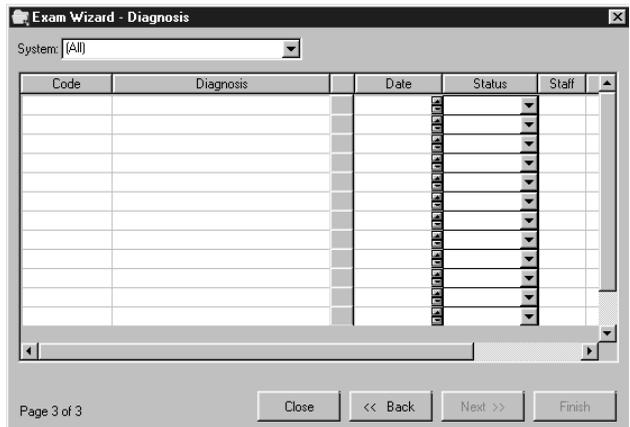


4. The body systems display based on the default template. If there are any abnormal systems, right-click on the system and update the status. The observation text will automatically change to reflect the system status. To modify the observation text, double-click the text. (If you modify the observation you can return to the Physical Exam to change the observation for other body systems or proceed directly to the Diagnosis.) Choose Dx/Rx when the Physical Exam is completed.

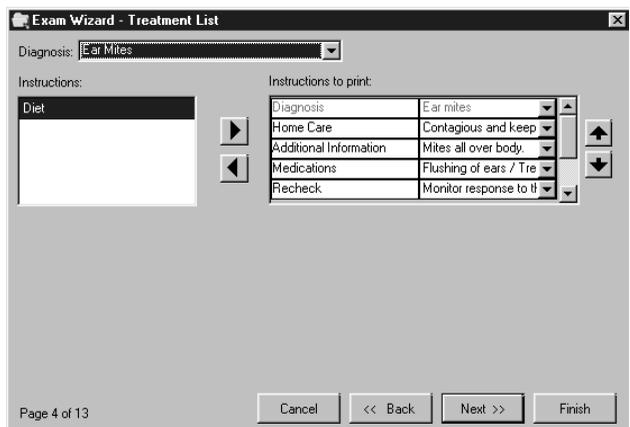
NOTE: You can set species specific system templates in Foundation through Species on the Lists menu.



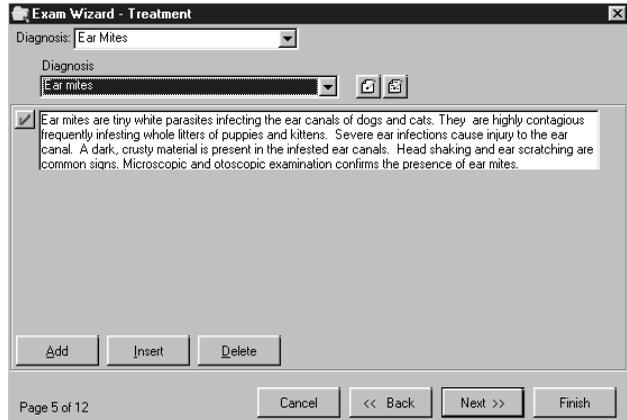
5. Choose the diagnostic code for this patient. Press F2 in the Code field to select from a list of enabled and active diagnostic codes.



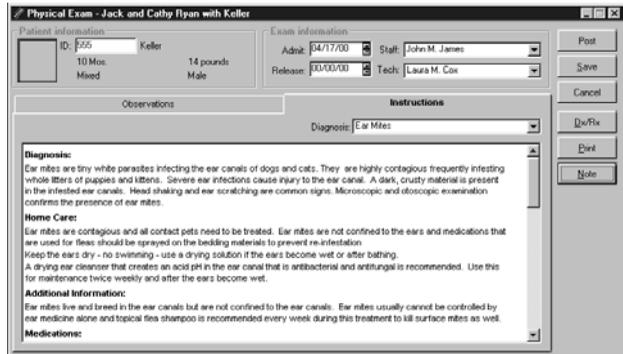
6. The instruction headers that will print on Treatment Plan are in the Instructions to Print box. Choose Next to proceed and view each instruction header. Choose Finish to create the Treatment Plan without reviewing each instruction header.



7. For each instruction header, you will be able to view the information linked to the diagnosis. Change or add any information as necessary. At any point you may choose Finish to immediately create the Treatment Plan without reviewing the remaining instruction headers. Choose Next to continue through the screens. The last screen will be a summary of the abnormal systems and the diagnoses. Choose Finish.



8. You will return to the Instructions tab of the Physical Exam. Modifications to this exam can be done by double-clicking on the part of the exam that you want to change. You can choose to print, post or save the Physical Exam. Post will close the exam. Changes cannot be made to a posted exam. Save allows you to reopen this exam at a later time to change and edit the information as necessary. You can also do a recheck on a saved or posted exam.



Checking Patients into the Practice

If you want the patients' files to automatically be available to you as a minimized icon in Patient Advisor, check patients into the practice using Cornerstone Foundation. The Check-In feature is also available in Patient Advisor.

Helpful Hints

- Patient Advisor will frequently check for patients that have been checked in during the day to keep the icons updated. For information on setting the number of icons to display, see "Setting up Patient Advisor Defaults" on page 14.
- If you have workstations in certain rooms, specify patients in certain rooms or with specific staff members when they are checked in. Then when you log into Patient Advisor using the staff and room, only those patients that are checked into that room or with that staff member will appear on that workstation.
- Use the check-in time to reflect the patient's appointment time if you check in several patients at once, for instance, at 7:30 each morning.

 For more information on checking in patients, please refer to the *Cornerstone Reference Manual*.

To open the Patient Check In from Patient Advisor

- From the **Activities** menu, choose **Check-In/Out**.
- Choose the Check-In/Out toolbar button from the taskbar.
- Choose Check In from the Census List. (From the **Lists** menu, choose **Census List** or press **F3**.)

Alerts

The client and patient alerts appear when you access a patient using the Patient File or the Physical Exam.

 For more information on client and patient alerts, please refer to the *Cornerstone Reference Manual*.

Introduction to the Patient File

Items display in the Patient File as the result of using the Physical Exam and Exam Wizard. Any information collected and prepared through the Physical Exam is held in the Patient File.

From the Patient File dialog box you can:

- View the patient's medical history.
- View departing instructions, invoice transactions, and images.
- Diagnose through the Physical Exam Wizard.
- Update the patient's medical history.
- Update comments, patient weight and diagnoses.
- Prescribe medications and print prescription labels.
- Check-in a patient.
- Update patient images.

To open the Patient File

- Double click the patient's minimized icon in Patient Advisor. The patient's file appears automatically.

OR Click **Patient File** from the **Activities** menu. Select the **patient** and press **TAB**.

OR Choose the Patient File toolbar button from the taskbar. Select the **patient** and press **TAB**.

Viewing and adding to the Patient File

The Patient File will show the medical history of the patient. The dialog box displays the patient information (such as age, weight, sex and breed) and owner information (such as name, balance, credit code and last payment information).

The Patient File displays medical history such as patient comments, prescriptions, weight history, invoice items, diagnoses, departing instructions, physical exams, check-in, declined history and patient images. You can customize the information that you want to view in the patient file.



For more information about customizing the information to be viewed in the Patient File and adding information to the Patient File, refer to the *Cornerstone Reference Manual*.

Introduction to the Physical Exam

The Physical Exam is the main feature of Patient Advisor. The Physical Exam will:

- Walk you through the diagnosis.
- Record the information when and where it is generated.
- Help determine the treatments based on the diagnosis.
- Update the patient's medical record.
- Update the Patient Visit List with the items to be invoiced if the template is set up with invoice items and the diagnosis is set as linked.
- Prepare documents the client can take home.

To open the Physical Exam

- On the **Activities** menu, choose **Physical Exam**.
- OR* Select the **Physical Exam** toolbar button.
- OR* Click the **Physical** button from the Patient File.

Timesaver

The most efficient way of using the Exam Wizard is through the Patient File. Use the Patient File to view the patient's history and make comments about the current exam. Choose the **Physical** button on the Patient File dialog box to start the Exam Wizard.

Using the Physical Exam

Overview

Once the preliminary information about the patient has been gathered and added to the Patient File, you can begin the diagnosis.

Before you begin

Become familiar with the preprogrammed information. Make sure you have customized the information to meet your practice standards.

The Patient Exam List

The Patient Exam List appears when you select a patient for the Physical Exam. It shows the patient's exam history.

Before you begin

- Select **Physical Exam** from the **Activities** menu and choose a patient.
- OR*
- Select **Patient File** from the **Activities** menu; select a patient and click on the **Physical** button.

To begin a new exam

Click on the **New** button. The Exam Wizard will display with default system information.

To recheck an exam

- 1 Select the open or posted exam.
- 2 Choose **Recheck**.

The Exam Wizard displays the previous exam. Add follow up care treatments as necessary.

To view an exam

- 1 Select the exam.
- 2 Choose **Select**.

If you selected a closed exam, it can only be viewed. You cannot change a closed exam.

If you selected an open exam, the Exam Wizard displays the previous exam. You can modify the information as needed. For more information on modifying an open (saved) exam, refer to page 80.

If the patient is checked into the practice, the check-in information will appear on the top of the window.

Use Recheck in instances such as broken limbs when you want the patient to come in to have bandages changed or additional x-rays performed.



The screenshot shows a window titled "Patient Exam List". At the top, it displays "Checked in on 5/6/93 14:32:44 by PSI". Below this, patient information is shown: ID: 308, 0 Yrs. 0 Mos., 0.00 pounds, Name: Spike, Pug, and Neutered. On the right side, there are buttons for "New", "Recheck", "Select", and "Close". Below the patient information is a table with columns: Admitted, Released, Status, and Staff.

Admitted	Released	Status	Staff
9/3/99	9/3/99	Closed Recheck	Peters, Sam L.
5/18/98	5/18/98	Closed	Peters, Sam L.
5/18/98	5/18/98	Closed	Peters, Sam L.

Related topics

Beginning the Diagnosis in the Physical Exam	Page 55
Modifying Observations on the Physical Exam	Page 56
Adding Observation Text Line-by-Line	Page 58
Adding Exam Notes to the Physical Exam	Page 64
Diagnosing with the Physical Exam Wizard	Page 61
Selecting Instructions to Print on the Exam Wizard	Page 65
Adding an Instruction to the Diagnosis in the Exam	Page 67
Adding a Treatment to the Diagnosis in the Exam Wizard	Page 69

Beginning the Diagnosis in the Physical Exam

If you have entered the Exam Wizard through the Patient File, the patient's information automatically displays.

To add exam information

- 1 The current date displays in the **Admit** field. Press **TAB** to continue or select a new date.
- 2 Select a **Staff ID**.
- 3 Select a **Tech ID**.
- 4 The default system template appears. Use the drop-down list to select a different system template, if necessary. If the system template has been linked to a specific species, that template appears. See "Setting up System Templates" on page 43. The default observation text appears based on the patient entered.

Physical Exam - Jack and Cathy Ryan with Keller

Patient information
ID: 555 Keller
10 Mos. 14 pounds
Mixed Male

Exam information
Admit: 04/17/00 Staff: John M. James
Release: 00/00/00 Tech: Laura M. Cox

Observations
System template: Canine

Nervous System (Normal)
Bright and alert, with a crisp, responsive mental attitude. Your pet has excellent body control, posture, balance, and coordination. Its reflexes are brisk and sharp. Perception of its environment and body position are well tuned.

Ears (Normal)
The ear drum and ear canals appear normal and healthy. There is no significant accumulation of wax or debris. The conformation of ear flap (external ear) is normal for the breed of the pet. The skin of the ear flap and inner ear is healthy with no signs of parasites or infection.

Lymph Nodes (Normal)
Prescapular, popliteal, inguinal, submandibular lymph nodes are of normal size and shape.

Mucous Membranes (Normal)
Gums are a healthy pink color with normal hydration and capillary refill time.

Overall Health (Normal)
Your dog is fit and in excellent health; a pleasure to examine and have here in our hospital. We look forward to seeing your dog again at the next checkup. Thank you

Buttons: Post, Save, Close, Dx/Rx, Print, Note

Timesaver

If the exam is normal and no diagnoses need to be made, choose to post or save.

Related topics

Modifying Observations on the Physical Exam	Page 56
Adding Observation Text Line by Line	Page 58
Diagnosing with the Physical Exam Wizard	Page 61
Adding Exam Notes to the Physical Exam	Page 64
Using the Instructions Tab to View the Treatment Plan	Page 77

Modifying Observations on the Physical Exam

The observations show the status and the text for each body system. The status of the observation can be changed. The observation text can be modified as well.

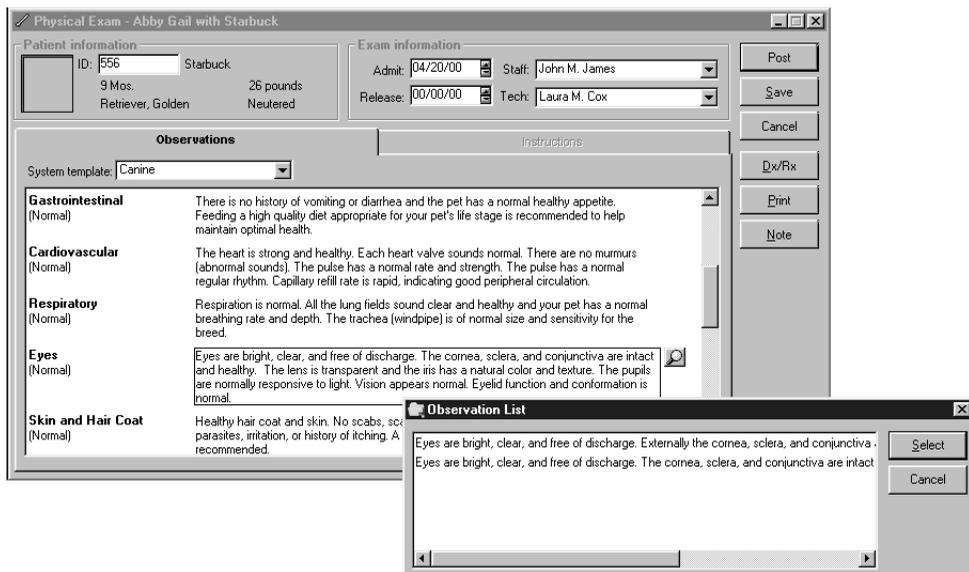
To change the observation status

- 1 Right-click on the observation and choose **Normal**, **Abnormal** or **Did not Examine**.
- 2 The status of the item and the text changes according to default text that is set up for the status. If there is no default text for the status, the text area will be left blank.

To change the observation text

- 1 Click on the lookup icon and a dialog box will display with the observations.
- 2 Click the desired observation.

If you change the observation status, the text will change according to the default text that is set up for that status.



To edit the observation text

Click the observation at the point you want to edit text and type text as needed.

OR

- 1 Double-click the observation to be changed or right-click on the observation and choose **Update**.
OR click on the **Search** button to select a different pre-defined observation.
- 2 Choose **Finish** to return to the Physical Exam or choose **Next** to continue through the Exam Wizard.

Related topics

Adding Observation Text Line by Line	Page 58
Diagnosing with the Exam Wizard	Page 61
Adding Exam Notes to the Physical Exam	Page 64
Posting the Exam	Page 78
Saving the Exam	Page 80

Adding Observation Text Line-by-Line

In some cases the observation may need to be customized for a patient. You can use existing observation text from Patient Advisor List and add it line-by-line to the patient's observation.

You can also add new observations to the Patient Advisor List.

To add observation text line-by-line

- 1 Double-click the observation or right-click the observation and choose **Update**. The Exam Wizard will display.
- 2 Select the **Status** (normal, abnormal or did not examine) from the drop-down list. Click in the Observation box and press **F2** or choose the **Search** button. The Observations List will display.
- 3 From the Observation text box, select the text to add to the observation.
- 4 Choose **Add**. The observation text will move from the middle box to the lower box. Text in the lower box will appear on the Physical Exam. Choose **Clear** to remove any text from the lower box.
- 5 Choose **OK** to save your changes and return to the Exam Wizard - System dialog box.
- 6 Choose **Finish** to return to the Physical Exam. Choose **Next** to continue with the diagnosis.

Note You can also click the magnifying glass button, highlight the desired line and click **Select**. The new observation text will replace the existing text.

Timesaver

At any point you can choose **Finish** to return to the Physical Exam and save, post or print the Pet Health Report Card and the Treatment Plan.

Adding a new observation to the Patient Advisor List for use with other systems

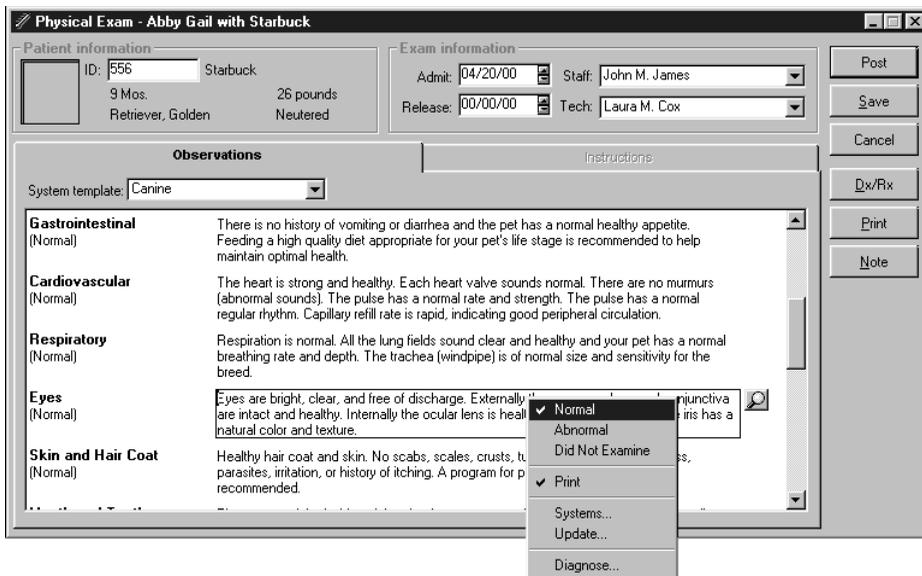
- 1 Double-click the observation or right-click the observation and choose **Update**. The Exam Wizard will display.
- 2 Click in the Observation box and press **F2** or choose the **Search** button. The Observations List will display.
- 3 Choose **New**. The Observation Setup dialog box appears.
- 4 Select the **system**, **observation type** and **species** to link to this observation.
- 5 Select the **Default** check box to use this observation as the default for this system. (If you select this item as default, this observation becomes the default

for this system, type and species and Patient Advisor clears the default check box of any previous default observations.)

- 6 Type the observation text.
- 7 Choose **OK**.
- 8 The new observation appears in the Observation box.
- 9 If you want to use this observation on this exam, choose **Add**. The observation text will move the lower box.
- 10 Choose **OK** to save your changes and return to the Exam Wizard-System dialog box.
- 11 Choose **Finish** to return to the Physical Exam. Choose **Next** to continue with the diagnosis.

Timesaver

If you modify an observation, you automatically proceed through the wizard. Choose Finish to return to the Physical Exam.



Physical Exam - Abby Gail with Starbuck

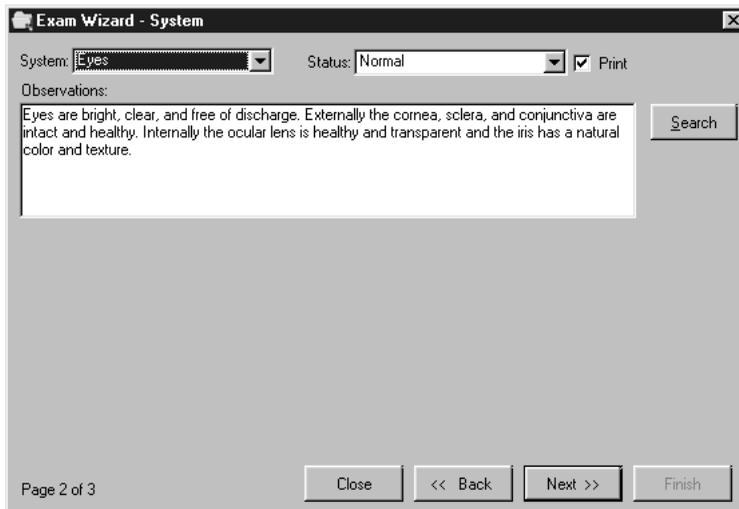
Patient information
ID: 556 Starbuck
9 Mos. 26 pounds
Retriever, Golden Neutered

Exam information
Admit: 04/20/00 Staff: John M. James
Release: 00/00/00 Tech: Laura M. Cox

Observations
System template: Canine

System	Description
Gastrointestinal (Normal)	There is no history of vomiting or diarrhea and the pet has a normal healthy appetite. Feeding a high quality diet appropriate for your pet's life stage is recommended to help maintain optimal health.
Cardiovascular (Normal)	The heart is strong and healthy. Each heart valve sounds normal. There are no murmurs (abnormal sounds). The pulse has a normal rate and strength. The pulse has a normal regular rhythm. Capillary refill rate is rapid, indicating good peripheral circulation.
Respiratory (Normal)	Respiration is normal. All the lung fields sound clear and healthy and your pet has a normal breathing rate and depth. The trachea (windpipe) is of normal size and sensitivity for the breed.
Eyes (Normal)	Eyes are bright, clear, and free of discharge. Externally are intact and healthy. Internally the ocular lens is healthy and of natural color and texture.
Skin and Hair Coat (Normal)	Healthy hair coat and skin. No scabs, scales, crusts, tufts, parasites, irritation, or history of itching. A program for prevention is recommended.

Context menu for 'Eyes' observation:
✓ Normal
Abnormal
Did Not Examine
✓ Print
Systems...
Update...
Diagnose...



Deleting observation text

Warning Following these steps will delete the observation from Patient Advisor, not just from this exam.

- 1 Right-click the observation.
- 2 Select the **Status** (normal, abnormal or did not examine) from the drop-down list. Choose **Update**, then click on the **Search** button.
- 3 Select the text to delete. Click **Delete**.
- 4 Choose **Finish** to return to the Physical Exam. Choose **Next** to continue with the diagnosis.

Related topics

Diagnosing with the Exam Wizard	Page 61
Adding Exam Notes to the Physical Exam	Page 64
Using the Instructions Tab to View the Treatment Plan	Page 77
Posting the Exam	Page 78
Saving the Exam	Page 80

Diagnosing with the Exam Wizard

Once you have viewed the observation text and physically examined the patient, you can continue to diagnose the animal.

Before you begin

- You must have a Physical Exam started.
- From the Physical Exam, choose **Dx/Rx**. The Exam Wizard - Diagnosis dialog box appears.

Adding a diagnosis in the Exam Wizard

- 1 Any diagnostic history for this patient displays in the dialog box.
 - Previous diagnostic history displays in gray.
 - Previous tentative diagnoses display in green.
 - New entries (tentative, final or ruled out) display in black.
- 2 Select the **system**, if necessary.
- 3 Select the **Diagnostic Code**. Press **F2** to search for a diagnostic code, if necessary. The diagnostic code description appears.

Note The F2 search displays the Diagnostic Code List dialog box. From this dialog you can add new diagnostic codes, update existing diagnostic codes or delete diagnostic codes.

- 4 The **Reminder** button displays if the diagnostic code was defaulted to Send Reminders in the Diagnostic Code setup. The Reminder button must display for this diagnostic code to be flagged for reminders. Change this button as necessary.
- 5 The current date appears. Select a new date if necessary.
- 6 Select the status of **Tentative**, **Final** or **Ruled out**. The default appears from the diagnostic setup.
- 7 Select the **Staff ID**.
- 8 To continue to add diagnoses, repeat steps 3-6.
- 9 Choose **Next** to continue through the Exam Wizard.

Timesaver

If you feel comfortable with the instruction and treatment information linked to a diagnosis, you can choose **Finish** to proceed quickly through an exam.

Related topics

Determine the Instruction to print on the Treatment Plan	Page 65
Adding an Instruction to the Diagnosis	Page 67
Adding a Treatment to the Diagnosis	Page 69
Modifying Treatment Templates	Page 72
Posting the Exam	Page 78
Saving the Exam	Page 80

Adding Exam Notes to the Physical Exam

Use the exam note to save comments about the exam. Notes are saved in the medical file with the exam. The note will not print on the exam.

To add exam notes

- 1 From the Physical Exam dialog box, choose **Note**.
- 2 Type the **note** and choose **OK**.

The exam note can be modified on an open or new exam and viewed on a closed exam.



Selecting Instructions to Print in the Exam Wizard

In the Exam Wizard, a treatment template appears for each diagnostic code that was entered on the previous dialog box. Review the information that you want to print on the Treatment Plan.

The instruction headings in the Instructions to Print box will print by default on the Treatment Plan.

To determine the instruction to print on the Treatment Plan

- 1 The instruction header and the title of the default template to print appear in the Instructions to Print box.
- 2 If you want additional instructions to print, select the **instruction** and choose the **right arrow** to move the instruction to the Instructions to Print box.
- 3 To remove an instruction from the Instructions to Print box, select the **instruction** and choose the **left arrow**.
- 4 Choose **Next** to continue through the wizard.

You can also double-click in the instruction to move it to the Instructions to Print box.

To change the order of the instructions to print

- 1 Choose the **instruction** to be moved. The item displays in green.
- 2 Use the **up** and **down arrow keys** to move the instruction to the order in which you would like it to appear on the Treatment Plan.
- 3 The instructions will print in the order displayed.

If you need to add an instruction heading for an item not specified to print, you can move the item and then add instructions and treatments as necessary.

Exam Wizard - Treatment List

Diagnosis: Ear Mites

Instructions:

Diet

Instructions to print:

Diagnosis	Ear mites
Home Care	Contagious and keep
Additional Information	Mites all over body.
Medications	Flushing of ears / Tre
Recheck	Monitor response to t

Page 4 of 13

Cancel << Back Next >> Finish

Note This dialog box will appear for each diagnosis that was entered on the previous dialog box.

Results

- When you choose Next, the wizard proceeds to the Exam Wizard - Treatment dialog box, where you can view, modify, and add treatments for each diagnosis for this patient.
- When you choose Finish, the wizard returns to the Physical Exam where you can change, save, post, or print the Pet Health Report Card and Treatment Plan for this patient.

Related topics

Adding Instructions to the Diagnosis	Page 67
Adding a Treatment to the Diagnosis	Page 69
Modifying Treatment Templates	Page 72
Posting the Exam	Page 78
Saving the Exam	Page 80

Adding an Instruction to the Diagnosis in the Exam Wizard

For each diagnosis' instruction a detailed treatment dialog box appears. You can add or change information.

Opening the Exam Wizard - Treatment dialog box

- Choose **Dx/Rx** from the Physical Exam and proceed through the wizard to the Instruction tab of the Physical Exam, which displays the Treatment Plan.
- Right-click an instruction header, procedure or text entry and choose **Update**.

To add an instruction

Adding an instruction/treatment will place it as the last item in the dialog box.

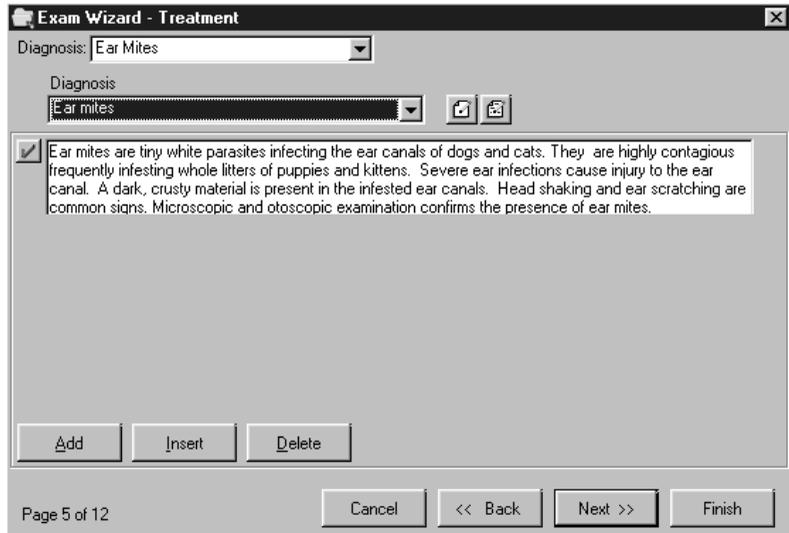
- 1 Select **Add**.
- 2 You can choose to add instruction text or a treatment (an invoice item). Select **instruction** and choose **OK**.
- 3 Type the instruction text in the box for this diagnosis.
- 4 Choose **Finish** to return to the Treatment Plan or choose **Next** to continue through the Exam Wizard.

To insert an instruction

Inserting an instruction/treatment will place the new item above the item where the cursor is currently located.

- 1 Select **Insert**.
- 2 You can choose to add instruction text or a treatment (an invoice item). Select **instruction** and choose **OK**.
- 3 Type the instruction text in the box for this diagnosis.
- 4 Choose **Finish** to return to the Treatment Plan or choose **Next** to continue through the Exam Wizard.

To return to a previous dialog box, click the **Back** button.



Results

- Information entered here prints on the Treatment Plan.
- The invoice items appear in the Patient Visit List.
- When you choose Next, the wizard proceeds through the Exam Wizard - Treatment dialog boxes.
- When you choose Finish, the wizard returns to the Physical Exam where you can change, save, post, or print the Pet Health Report Card and the Treatment Plan for this patient.

Related topics

To determine the instruction to print on the Treatment Plan	Page 65
Adding a Treatment to the Diagnosis	Page 69
Posting the Exam	Page 78
Saving the Exam	Page 80

Adding a Treatment to the Diagnosis in the Exam Wizard

To open the Exam Wizard - Treatment List

- Choose **Dx/Rx** from the Physical Exam and proceed through the wizard.
- From the Instructions tab of the Physical Exam, right-click a treatment or instruction and choose **Update** or **Treatments**.

Before you begin

The preprogrammed treatment information must have an item ID linked before you can continue through this dialog box. Press **F2** to choose your item ID to link to this treatment. (If the invoice item does not exist in your database, you can add it through Cornerstone Foundation.) See the section "Linked vs. Non-linked Invoice Item IDs" on page 18.

To add treatment information or an invoice item

Adding information or an invoice item will place it as the last item in the dialog box or directly below the focus of the cursor.

- 1 Select **Add**.
- 2 You can choose to add general information or an invoice item. Select **invoice item** and choose **OK**.
- 3 Select an **item ID**. The description appears.
- 4 In the Quantity, type the quantity to dispense of this item. The amount is updated.
- 5 Apply taxes and discounts as necessary.
- 6 In the blue line, type an item note, if necessary. This note will transfer to the Patient Visit List if the diagnosis is linked.
- 7 Choose **OK** to save the instruction.
- 8 Choose **Next** to continue through the Exam Wizard.

Select the prescription button to open the prescription label dialog box.

Timesaver

At any time during the Exam Wizard, you can choose **Finish** to return to the Physical Exam. If information is linked to the diagnoses, it appears in the Treatment tab.

To add information for a specific item

- 1 In the Treatment Template Setup dialog box, select the treatment.
- 2 Choose **Add**.
- 3 Choose **Specific Item Information**.
- 4 Type the information for this item.
- 5 Choose **Insert** to insert the information.
- 6 Choose **OK** to save the information.
- 7 Choose **Next** to continue through the Exam Wizard.

Specific item information will not be available unless there are items for this diagnosis.

To insert treatment information or an invoice item

Inserting information or an invoice item will place the new entry above the item where the cursor is currently located.

- 1 Select **Insert**.
- 2 You can choose to add general information or an invoice item. Select **invoice item** or **specific item information** and choose **OK**.
- 3 Select an **item ID** or type the text in the box for this diagnosis.
- 4 Choose **Next** to continue through the Exam Wizard.

Exam Wizard - Treatment

Diagnosis: Ear Mites

Diagnosis: Ear mites

Item ID	Description	Quantity	Amount	Disc	Tax	Staff ID
2318	Ear Flushing	1.00	\$15.00	No	No	1

Ear mites are tiny white parasites infecting the ear canals of dogs and cats. They are highly contagious frequently infesting whole litters of puppies and kittens. Severe ear infections cause injury to the ear canal. A dark, crusty material is present in the infested ear canals. Head shaking and ear scratching are common signs. Microscopic and otoscopic examination confirms the presence of ear mites.

Item ID	Description	Quantity	Amount	Disc	Tax	Staff ID
				No	No	

Add Insert Delete

Page 5 of 13

Cancel << Back Next >> Finish

Treatment status buttons

The treatment status button, the plus **+** sign next to the treatment item, is used to indicate the status of the item for this patient.

Click on the button to change it to a different status.

The  indicates the item was recommended to the client.

The  indicates the item's recommendation was accepted by the client.

The  indicates the item was performed on the patient and should be included on the invoice.

The  indicates the item or service was declined by the client.

The  indicates the item or service was declined by the client and you want it to appear in the patient's history.

Results

- Item notes (notes typed in the blue line) will not print on the Treatment Plan or appear in the patient's file.
- The invoice item and matching information appears on the Treatment Plan and in the patient's file.
- If the diagnosis is marked as linked, the invoice items are in the Patient Visit List, so they can be transferred to the invoice.



Please refer to the *Cornerstone Reference Manual* for additional information about items that are placed in the Patient Visit List.

Related topics

Adding an Instruction to the Diagnosis	Page 67
Posting the Exam	Page 78
Saving the Exam	Page 80

Modifying Treatment Templates

At any time through the Exam Wizard, you can change the treatment information and attached invoice items to meet the needs of your practice or the needs of the patient.

To open the Exam Wizard - Treatment List

- Choose **Dx/Rx** from the Physical Exam and proceed through the wizard.
- From the Instruction tab of the Physical Exam, right-click a procedure or instruction and choose **Update** to proceed to the Exam Wizard - Treatment dialog box. Choose **Treatments** to proceed to the Treatment List dialog box.

To modify treatment information, invoice items and specific item information

- 1 Modify the general information, invoice item(s) and/or specific item information as necessary.
- 2 The preprogrammed information will not contain an item ID. Press F2 to locate your invoice item ID that matches the treatment. (If the invoice item does not exist in your database, you can add it through Cornerstone Foundation or choose another invoice item.) You cannot continue through this dialog box without linking the item ID if the diagnosis is marked as linked.

See the section "Linked vs. Non-linked Invoice Item IDs" on page 18.

- 3 Choose **Next** to continue through the Exam Wizard.
- 4 Choose **Finish** to return to the Physical Exam dialog box.

Changing the Systems to Print During the Physical Exam

You can modify the default templates during a Physical Exam.

To add a System to print on the Pet Health Report Card

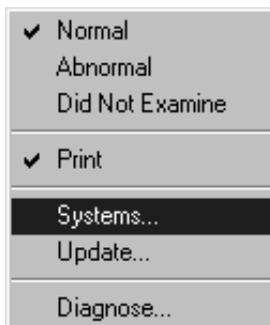
- 1 Right-click on a system.
- 2 Choose **Systems**.
- 3 The systems with a check mark will print on the Pet Health Report Card.
- 4 Select additional systems to print. The check mark displays.
- 5 Choose **OK** to save the changes for this physical exam.

To prevent a System from printing on the Pet Health Report Card

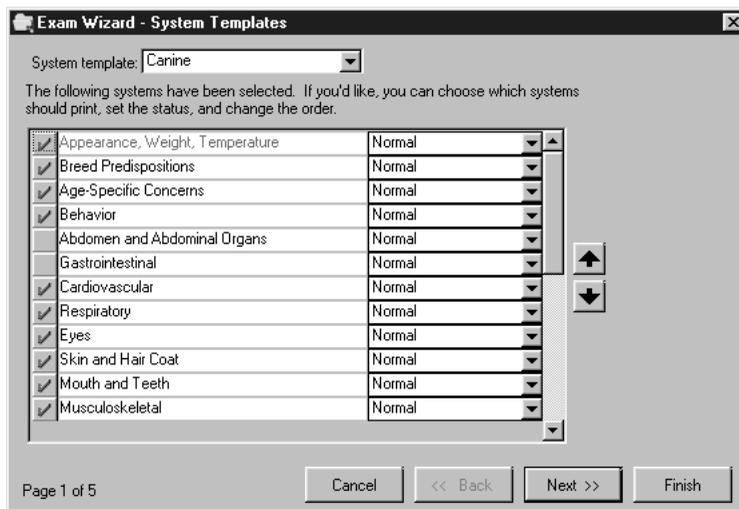
- 1 Right-click on a system.
- 2 Choose **Systems**.
- 3 The systems with a check mark will print on the Pet Health Report Card.
- 4 Deselect any systems that you do not want to print on the Pet Health Report Card. The check mark will not display.
- 5 Choose **OK** to save the changes for this physical exam.

Or

- 1 Right-click on the system you do not want to print.
- 2 The Print command appears with a check mark. This system is defaulted to print.
- 3 Select **Print**. The system will not print on the Pet Health Report Card.



In this example, the Abdomen and Abdominal Organs and Gastrointestinal systems will not print on this patient's Pet Health Report Card.



Results

The systems are updated for this Physical Exam only. The system template will not be changed permanently. To change the system template for the practice, select **System Templates** from the **Lists** menu.

Finishing the Physical Exam

Overview

You have completed the Physical Exam. Use the summary dialog box to view the patient's abnormal diagnoses and the diagnostic codes. You can use the Treatment tab in the Physical Exam to view the treatment information for this patient. You can save or post the exam so it is included in the patient's file.

Using the Summary Dialog Box to View the Diagnosis

The Summary dialog box shows the abnormal diagnoses that you selected on the Physical Exam and the diagnosis information from the Exam Wizard.

To open the Summary dialog box

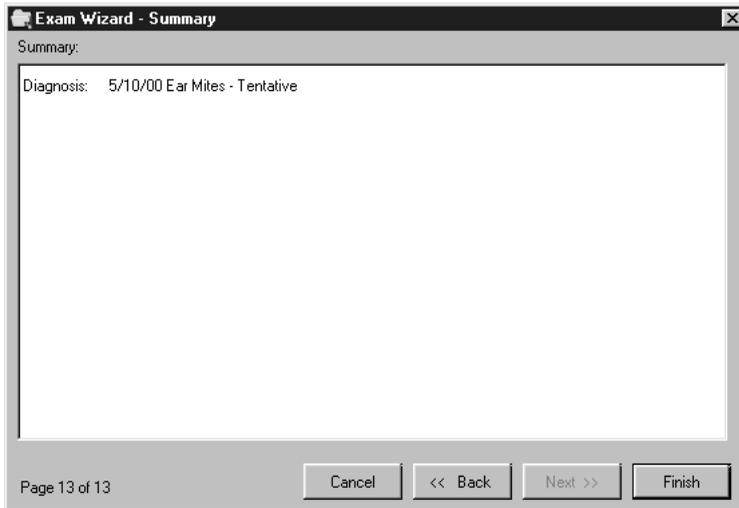
- Choose **Dx/Rx** from the Physical Exam and proceed through the wizard until you reach the Summary dialog box.

OR

- From the Instruction tab of the Physical Exam, right-click a treatment or instruction and choose **Update** to proceed to the Exam Wizard – Treatment List dialog box. Choose **Treatments** to proceed to the Treatment List dialog box. Proceed through the wizard to reach to the Summary dialog box.

Viewing the Diagnosis Summary

- 1 If you find information that you want to change, choose **Back** to return to a previous dialog box of the Exam Wizard.
- 2 If you want to finish the Exam Wizard and return to the Physical Exam, choose **Finish**. You can post, save, or print the exam.



Related topics

Using the Instructions Tab to View the Treatment Plan

Page 77

Posting the Exam

Page 78

Saving the Exam

Page 80

Using the Instructions Tab to View the Treatment Plan

The Treatment dialog box shows you the treatment information that you selected through the Exam Wizard. If you finished the Exam Wizard before going through each dialog box, use the Instructions tab to view the Treatment Plan.

Viewing the Treatment Plan

- 1 From the **Physical Exam**, select the **Instructions** tab.
- 2 View the information.
- 3 Return to the Observation tab to complete the exam.

Physical Exam - Abby Gail with Starbuck

Patient information

ID: 556 Starbuck
9 Mos 26 pounds
Retriever, Golden Neutered

Exam information

Admit: 04/20/00 Staff: John M. James
Release: 00/00/00 Tech: Laura M. Cox

Buttons: Post, Save, Cancel, Dx/Rx, Print, Note

Instructions

Diagnosis: Ear Mites

Code	Description	Quantity	Price
2318	Ear Flushing	1.00	\$15.00

Diagnosis:
Ear mites are tiny white parasites infecting the ear canals of dogs and cats. They are highly contagious frequently infesting whole litters of puppies and kittens. Severe ear infections cause injury to the ear canal. A dark, crusty material is present in the infested ear canals. Head shaking and ear scratching are common signs. Microscopic and otoscopic examination confirms the presence of ear mites.

Home Care:
Ear mites are contagious and all contact pets need to be treated. Ear mites are not confined to the ears and medications that are used for fleas should be sprayed on the bedding materials to prevent re-infestation.
Keep the ears dry - no swimming - use a drying solution if the ears become wet or after bathing.
A drying ear cleanser that creates an acid pH in the ear canal that is antibacterial and antifungal is recommended. Use this for maintenance twice weekly and after the ears become wet.

Additional Information:
Ear mites live and breed in the ear canals but are not confined to the ear canals. Ear mites usually cannot be controlled by

Modifying the Treatment Plan from the Instructions Tab

- 1 If you need to change information, right-click the item.
- 2 Choose **Update** to return to the Treatment dialog box and modify the instruction or treatment item in the treatment template.
- 3 Choose **Treatment** to return to the Treatment List dialog box and modify the instructions to print and proceed through the wizard.
- 4 Choose **Finish** from the Exam Wizard to return to the Physical Exam.
- 5 If changes were made, you must save or post the exam to save the changes.

Related topics

Posting the Exam

Page 78

Saving the Exam

Page 80

Posting the Exam

When you post an exam, the exam is saved in the patient's medical history and is considered closed. After an exam is posted, it cannot be modified. You can use a posted exam to recheck a patient. When you recheck a patient, the observation text from the posted exam appears in the Physical Exam.

Before you begin

- Complete a physical exam.
- Open a saved exam to be posted.

To post the exam

- 1 On the Physical Exam, choose **Post**.
- 2 You can choose to print the Pet Health Report Card and/or the Treatment Plan.
- 3 The header and footer information appears automatically as set up in Data Defaults. Change the information as necessary.
- 4 If **Print Item IDs** is selected, the invoice item IDs used by your practice will print on the Treatment Plan. If **Print Prices** is selected, the individual invoice item's prices will print on the Treatment Plan. If Print Prices is not selected, the invoice items' prices will not appear on the Treatment Plan. If **Print Totals** is selected, a total for all of the invoice items will be included.
- 5 Choose **Post**.

Use data defaults to set up the standard information such as print, or not print and exam messages for this dialog box.

The screenshot shows a dialog box titled "Physical Exam" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Pet health report card - print information" and "Treatment plan - print information".

Pet health report card - print information:

- A checked checkbox labeled "Print" is followed by "# copies:" and a text input field containing "1".
- A "Message:" label is followed by a dropdown menu and a large empty text area below it.

Treatment plan - print information:

- A checked checkbox labeled "Print" is followed by "# copies:" and a text input field containing "1".
- A "Diagnosis to print:" label is followed by a dropdown menu showing "(All)".
- Three checked checkboxes are listed: "Print item ID's", "Print prices", and "Print totals".
- A "Header:" label is followed by a dropdown menu and a large empty text area below it.
- A "Footer:" label is followed by a dropdown menu and a large empty text area below it.
- A "Diagnosis message:" label is followed by a dropdown menu and a large empty text area below it.

On the right side of the dialog, there are two buttons: "Post" and "Cancel".

Sample Physical Exam dialog box

Related topics

The Patient Visit List

Page 81

Printing the Pet Health Report Card and the Treatment Plan

Page 81

Saving the Exam

A saved exam can be modified and used for a recheck on a patient. A saved exam is considered open. If you select a saved exam, the observation, diagnosis and treatment information from the saved exam appears in the Physical Exam. On a recheck, the observation text from the saved exam will be defaulted into the Physical Exam.

Before you begin

- Complete a physical exam or open a saved or recheck exam.

To save the exam

- 1 On the Physical Exam, choose **Save**.
- 2 You can choose to print the Pet Health Report Card and/or Treatment Plan.
- 3 The header and footer information appears automatically as set up in Data Defaults. Change the information as necessary.
- 4 If **Print Item IDs** is selected, the invoice item IDs used by your practice will print on the Treatment Plan. If **Print Prices** is selected, the individual invoice item's prices will print on the Treatment Plan. If Print Prices is not selected, the invoice items' prices will not appear on the Treatment Plan. If **Print Totals** is selected, a total for all of the invoice items will be included.
- 5 Choose **Save**.

Use data defaults to set up the standard information such as print, or not print, and exam messages for this dialog box.

Modifying a Saved (Open) Exam

When an open exam is chosen, the Physical Exam dialog box contains the previous exam's information. You can modify or add to this exam with the necessary treatments or instructions.

To modify the exam

- 1 Select an open exam from the Patient Exam List.
- 2 Proceed through the Exam Wizard as usual. You can make changes as necessary.
- 3 Choose **Finish** to complete the exam.
- 4 Choose **Save** to leave the exam open.
Or Choose **Post** to close the exam.
Or Choose **Print** to print the Pet Health Report Card and the Treatment Plan.

Performing a Recheck

You can perform a recheck exam on a closed or open exam. When you choose recheck, the Physical Exam dialog box contains the previous exam's observation information only. You can add to this exam with necessary follow-up care instructions and treatments.

To perform a recheck

- 1 Select an open or closed exam from the Patient Exam List and choose **Recheck**.
- 2 Proceed through the Exam Wizard as usual. You can make changes as necessary.
- 3 Choose **Finish** to complete the exam.
- 4 Choose **Save** to leave the exam open.
Or Choose **Post** to close the exam.
Or Choose **Print** to print the Pet Health Report Card and/or the Treatment Plan.

Printing the Pet Health Report Card and the Treatment Plan

Before you begin

- Complete a physical exam.
- Open a saved or recheck exam.

To print the Pet Health Report Card and the Treatment Plan

- 1 On the Physical Exam, choose **Print**.
- 2 You can choose to print the Pet Health Report Card and/or the Treatment Plan.
- 3 The header and footer information appears automatically as set up in Data Defaults. Change the information as necessary.
- 4 If **Print Item IDs** is selected, the invoice item IDs used by your practice will print on the Treatment Plan. If **Print Prices** is selected, the individual invoice item's prices will print on the Treatment Plan. If Print Prices is not selected, the invoice items' prices will not appear on the Treatment Plan. If **Print Totals** is selected, a total for all of the invoice items will be included.
- 5 Choose **Print**.

Note If you choose Print Preview, only the current diagnosis displays.

Patient Visit List

The Patient Visit List is available in Patient Advisor. Information from the other features of Cornerstone, including Appointment Scheduler and Prescription Labels is stored here. Information from Patient Advisor will display next to the thermometer icon (located in the left margin). The information in the Patient Visit List can then be applied to the invoice.

The Patient Visit List can be accessed from the **Activities** menu in Patient Advisor.

Patient Visit List - Keller

Patient information
ID: 555 Keller
11 Mos. 14.5 pounds
Mixed Male

Owner information
Owner: Jack and Cathy Ryan
Credit code: Cash or Credit
Payment:

	Item ID	Description	Qty	Amount	Disc	Tax	Staff ID	Date
	2318	Ear Flushing	1.00	\$15.00	No	No	1	04/17/00
	2613	Tresaderm Solution 15 ml	1.00	\$17.00	No	No	1	04/17/00
	2319	Ear Taping	1.00	\$0.00	No	No	1	04/17/00
					No	No		
					No	No		
					No	No		

Include recommended
 Include accepted
 Include performed

Total: 32.00
Discounts: 0.00
Taxes: 0.00
Total: 32.00

Buttons: OK, Cancel, Perform

For more information on the Patient Visit List, please refer to the *Cornerstone Reference Manual*.

Patient Census

To view all of the patients currently checked into your practice at any time, use the Patient Census. The Patient Census displays client and patient names and IDs, the check-in dates and times, staff member IDs, and explanations of visits. In addition, the Patient Census displays how many patients have checked into and out of the practice for the day. You can sort the list by client or patient name, date and time, staff, or the type of visit.

To view the Patient Census

Choose **Census** on the **Lists** menu *or* press **F3** *or* click the Patient Census icon on the toolbar. The Census List appears.

Client Name	Patient Name	Check-in Date/Time	Staff	Reason f
Dobler, Lloyd A.	Malibu	05/10/00 02:30:46 PM	4	Re-check
Gail, Abby	Starbuck	05/10/00 01:11:09 PM	1	Yearly Exam
Ryan, Jack and Cathy	Keller	05/10/00 02:06:33 PM	11	Vaccinations



For more information on the Patient Census, please refer to the *Cornerstone Reference Manual*.



Timesaver

If you use Cornerstone's Appointment Scheduler, you can select to only view Scheduled Appointments (instead of patients in hospital).

Analyzing Patient Advisor: Using Reports

Introduction

Now that you are using Patient Advisor, you can begin to generate data to analyze your practice, determine your practice's diagnostic history, and locate opportunities for growth. The data you need is easy to collect with Patient Advisor reports.

Using Filters and And/Or Statements



Please refer to the chapter ANALYZING YOUR PRACTICE: USING REPORTS in the *Cornerstone Reference Manual* for detailed instructions on using filters and "and/or" statements.

Printing reports

The top of the Report Preview displays the total amount of records in the report, the number of records selected (either all or a range), and the number of records read. It also displays the number of pages in the report and the current page being viewed.



Please refer to the chapter ANALYZING YOUR PRACTICE: USING REPORTS in the *Cornerstone Reference Manual* for detailed instructions on printing, previewing, and saving reports.

Generating Diagnostic Reminders

Reminders are an important tool for your practice. With the ability to send reminders based on the patient's diagnosis, you can expand your reminder system to include updates on new procedures or medications for diseases or chronic conditions.

Generating reminders pulls the reminder data from the patient files based on the diagnosis and holds that information in another file so you can use it to print your reminder postcards or letters.



For more information on Reminders, refer to the chapter, USING REMINDERS, in the *Cornerstone Reference Manual*.

Before you begin - understanding flagged diagnoses

Flagged diagnostic codes are those that display the tickler icon in the Physical Exam.

To generate diagnostic reminders

- 1 From the **Reports** menu, choose **Reminders by Diagnosis**.
- 2 Select the **Sort** order.
- 3 Select to **Send To** Flagged Diagnoses or All Diagnoses.

All Diagnoses sends reminders based on all the diagnoses that were assessed in the Physical Exam.

Flagged Diagnoses sends reminders based on the diagnoses that were assessed in the Physical Exam and only display the Send Reminders button.

- 4 Under System Information, select **ALL** to generate reminders for diagnostic codes included in all systems. **Deselect ALL** to choose the systems. Highlight the systems to include in the diagnostic code search.
- 5 Under Subsystem Information, select **ALL** to generate reminders for diagnostic codes included in all subsystems. **Deselect ALL** to choose the subsystems. Highlight the subsystems to include in the diagnostic code search.
- 6 Specify a **Range** to further break down your search.
- 7 Use **Preview** to view the information. Use the **Print** button to print the report.

The printed report will not include all of the information that the text file contains. Use the text file to print your reminder postcards or letters through Microsoft® Word.



For more information on printing the reminder report and the reminder postcards or letters, refer to USING REMINDERS in the *Cornerstone Reference Manual*.

Reminders by Diagnosis

Sort order:

Diagnosis information: Send to:

Systems information:

- Age-Specific Concerns
- Appearance, Weight, Temperature
- Behavior
- Blood Disorders
- Breed Predispositions

Select All Deselect All

Subsystem information:

Select All Deselect All

Range:

Description	Starting value	Ending value	And/Or
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Preview
Print
Close

Patient Advisor Reports

You can access all of the Patient Advisor reports from the Reports menu. The following alphabetical list outlines what each report contains.

 **Remember** When using ID filters, you can often press **F2** to select the ID to use.

Diagnosis Count Report

The Diagnosis Count Report shows a count of the number of times a diagnosis has been used.

Sort Order: Diagnostic Code and Diagnostic Description

Filters: Diagnostic Code, Description, and Date Range

Report Details: Each instance of a diagnosis being given to a patient will be counted and included on this report. The report shows the diagnostic ID, description, and the number of times diagnosed. Use this report to locate target markets.

Diagnostic Code Report

The Diagnostic Code Report provides a list of your existing diagnostic codes.

Sort Order: Diagnostic Code and Diagnostic Description

Filters: System, Subsystem, Default Status, Status, VPI Code, Diagnostic Code, and Diagnostic Description

Report Details: The report shows the Diagnostic Code, Description, Default Status, VPI Code, and Status (active or inactive).

Instruction Templates Report

The Instruction Templates Report lists all the treatments and instructions assigned to a particular diagnostic code. You can select what you want to include in this report.

Sort Order: System Description

Filters: Diagnostic Description, Instruction Description, System, and Subsystem

Report Details: The report shows the system, subsystem, diagnostic code, instructions linked to the diagnostic code. Use this report to review the start up data included with Patient Advisor.

 **Caution** This report can be extremely long. Consider using filters when printing this report.

Observations Report

The Observations Report shows the observation text for all normal and abnormal systems.

Sort Order: System

Filters: System

Report Details: This report shows the system, status, species, default, and the observation text for each body system.

Open Physical Exam

The Open Physical Exam Report lists all patients with open exams in admission date order.

Sort Order: Date

Filters: Date, Patient ID, Patient Name, Staff ID, and Staff Name

Report Details: The report shows the date admitted, exam ID, patient ID, patient name, client ID, client name, and staff member. Use this report to review the open exams and determine if a recheck exam is necessary or if the exam should be posted.

Patient Advisor System Setup Report

The Patient Advisor System Setup Report provides a list of the system names in alphabetical order by system description and the names of the subsystems in each system.

Sort Order: Description

Filters: Description

Patient Diagnosis Report

The Patient Diagnosis Report shows a list of all patients that have received a specific diagnosis.

Sort Order: Diagnostic Code and Diagnostic Description

Filters: Date, Diagnostic Code, Diagnostic Description, Patient ID, Patient Name, and Diagnosis Status

Report Details: This report includes the diagnostic code, diagnostic description, patient ID and name, the date diagnosed, and the status of the diagnosis. The total number of patients with the diagnosis is shown. The report will not show duplicate diagnoses. For instance, if a patient has been diagnosed with congestive heart failure more than once, it is listed only once on the report. If you choose to export this report, additional information such as client ID, name and address is included in the file.

Use the Patient Diagnosis Report to locate opportunities for target mailings.

Patient Diagnosis Status Report

The Patient Diagnosis Status Report shows the patients diagnoses and their status.

Sort Order: Diagnostic Code and Diagnostic Description

Filters: Diagnostic Code, Diagnostic Description, Date, Patient ID, Patient Name, Patient Status

Report Details: This report shows the diagnostic code and diagnostic description, patient ID and name, diagnosis status and the patient status. Each instance of a diagnosis being recorded will be included on the report. If the information is saved to a file, the client ID, name, and address will be included in the file.

Diagnosis by Staff Report

The Diagnosis by Staff Report shows the number of times a staff member has used a diagnosis.

Sort Order: Staff ID and Staff Name

Filters: Staff ID, Staff Last Name, Date, Diagnostic Code and Description and Diagnosis Status

Report Details: This report shows the staff ID and name, diagnostic code and description, and the number of times the diagnosis has been used. All instances of a diagnosis being recorded for a patient will be included on the report.

System Template Setup Report

The System Template Setup Report shows the body systems marked as default for each system template and the system's default status.

Sort Order: Description

Filters: Description, Body System, Status, and Default

Report Details: This report shows the template description, body systems for each template, the status and default for each body system. (Body systems print in order specified in System Template Setup.)

Glossary of Terms

Diagnosis/Assessment

The determination of the cause of the animal's condition.

Final

A diagnosis that has been determined or is obvious from the start, such as, broken leg or hit by a car.

Instruction Headings

An instruction heading is a category that appears on the Treatment Plan. There may be certain types of information you always want to appear on the Treatment Plan, such as diet, exercise, medications, recheck, and symptoms to be concerned about.

Item Status

As invoice items are included in the Physical Exam, they can be given a status to appear in the medical history.

Item Status, Accepted

After the invoice is generated, an item marked as accepted on the Patient Visit List will display in the patient's medical history, showing that the recommendation was accepted.

Item Status, Declined

A declined item is recorded in the Patient Visit List as being declined by the client.

Item Status, Declined to History

After the invoice is generated, an item marked as declined to history on the Patient Visit List will display in the patient's medical history, showing that the recommendation was declined.

Item Status, Performed

After the invoice is generated, an item marked as performed on the Patient Visit List will display in the patient's medical history, showing that the recommendation was performed.

Item Status, Recommended

After the invoice is generated, an item marked as recommended on the Patient Visit List will display in the patient's medical history, showing the recommended item.

Observations

Observations are symptoms you would be looking for in a normal or abnormal situation for each system. Observations are broken down into three categories; normal, abnormal, and did not examine. Observations print on the Pet Health Report Card.

Pet Health Report Card

The document that prints with all the system observation information after the Physical Exam has been completed. This document was called History and Physical Exam in earlier versions of Cornerstone.

Physical Exam

The dialog box used to determine the diagnosis. The exam wizard, included in the physical exam, is a step-by-step tool to help you through a diagnosis. The Pet Health Report Card prints with all the system observation information.

Ruled out

A diagnosis that was suspected, but then ruled out as valid.

Subsystems

Detailed system information that further breaks down the patient diagnosis.

System Templates

Used to set up your choices of systems and subsystems to appear on the physical exam document. If a particular species needs specific systems listed, you would define them here.

Systems

Include the basic organized groupings of related structures, e.g., circulatory. These systems are not species specific.

Tentative

A diagnosis that is subject to change when more information is gathered.

Treatment

Each diagnosis can have an invoice item associated with it. The invoice item is a treatment.

Treatment Instructions

An instruction associated with an individual diagnosis. Each instruction can have a unique body of text that would provide information about ongoing care or plans.

Treatment Plan

The document that includes the diagnostic information and the treatment and instruction information the owner needs to care for his or her pet. The Treatment Plan was called Patient Advisor Instructions in earlier versions of Cornerstone.

Treatment Template

The dialog box where the treatments, instructions, and treatment instructions are combined for a diagnosis.

VPI Codes

Veterinary Pet Insurance codes associated with certain procedures for billing.

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