Working with a Cornerstone Multi-Location/Single Database system

If your Cornerstone* Software and database are shared by multiple practice locations, follow the steps below to:

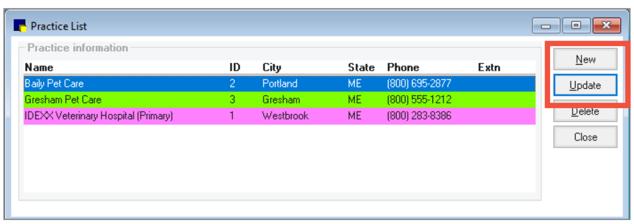
- Add practice(s) and designate one as the primary practice.
- Assign a default practice to staff or to a workstation.
- Assign clients to a home practice.
- Create cashier IDs and revenue centers per practice.
- Add and designate appointment suites.

You'll find a list of Multi-Location/Single Database (MLSD) reports at the end of this document.

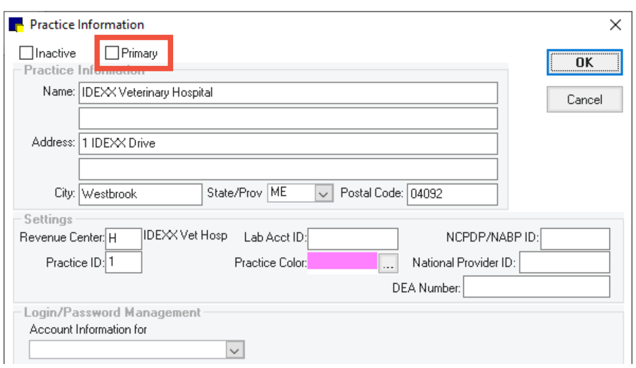
Adding a practice and designating the primary practice

Use the Practice List to manage practices associated with your database. One active practice must be marked as primary. Its name and contact information will be listed on all client communications with Pet Health Network* Pro.

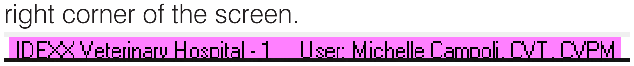
1. Go to **Lists>Practice**, and then click **New** or **Update**.



2. Select the **Primary** check box. **Note:** The Primary practice cannot be inactivated until another practice is designated as Primary.



3. Enter or update the practice information.
Tip: Next to the **Practice Color** box, click the three dots (…) to choose a color. The practice and staff member names will appear in that color in the lower right corner of the screen.



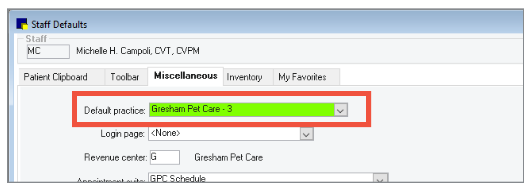
4. Click **OK**.

Assigning a default practice

A default practice can be assigned either to a staff ID or to a workstation. Cornerstone first looks for a default practice for the logged-in user; if none exists, it uses the workstation default. If both are absent, the primary practice is used.

To assign a default practice to a staff ID:

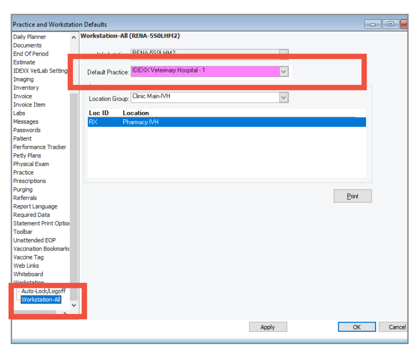
1. Go to **Controls>Defaults>Staff**.
2. Select the **Miscellaneous** tab.
3. Select the default practice for this staff ID.



4. Click **Save** to add a default practice for another Staff ID, or click **OK** to save changes and close.

To assign a default practice to a workstation:

1. Go to **Controls>Defaults>Practice and Workstation**.
2. On the left, select **Workstation>Workstation-All**.
3. In the Default Practice list, select the default practice for this workstation and click **OK**.
When a staff member logs in, they will use the default practice's information.



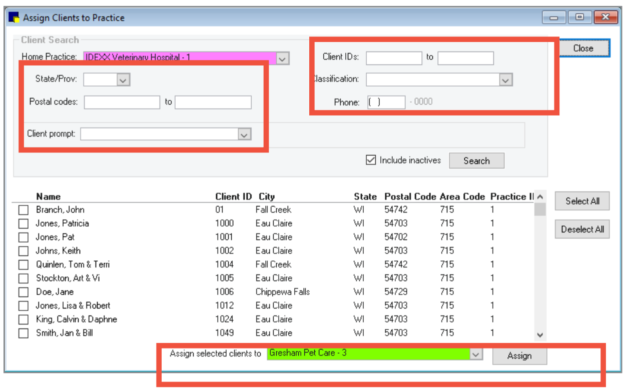
Tip: To log in to a different practice, a staff member with appropriate security privileges can select **File>Switch Logged In Practice.**

Assigning clients to a home practice

Each client must be assigned to a home practice. When you generate an Accounts Receivable report, you'll find the client's name on the accounts receivable list for the home practice only; however, the client's balance will be the total outstanding balance from all practices.

You can assign multiple clients to a home practice at one time.

1. Go to **Tools>Assign Clients to Practice**.
2. Enter search criteria to find the group of clients (for example, enter a range of postal codes), and then click **Search**. A list of clients is displayed.
3. To the right of the Client List, click **Select All** or select the check boxes for each client you want to include.

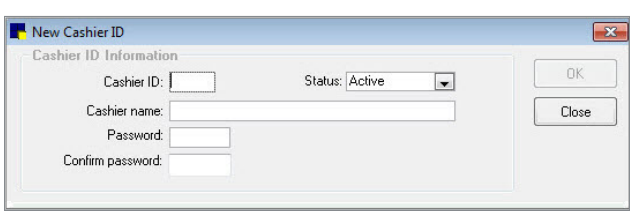


4. In the **Assign selected clients to** drop-down list, select the new home practice for the clients, and then click **Assign**.
5. Click **Close**.

Creating or updating cashier IDs

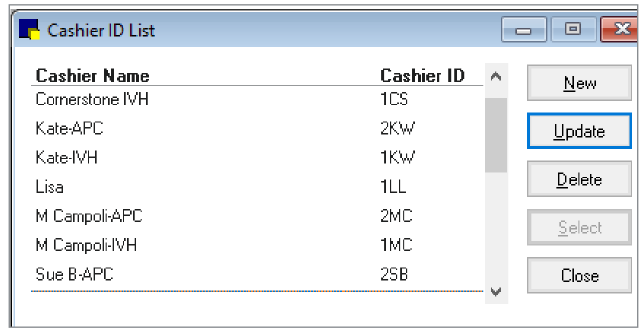
If a staff member works at more than one location, create a separate cashier ID for that person at each location.

1. Go to **Lists>Cashier ID**, and then click **New** or **Update**.
2. When prompted, enter an administrator user name and password.
3. Enter the cashier information, including a cashier ID, user name, and password, and then click **OK**.



Tips:

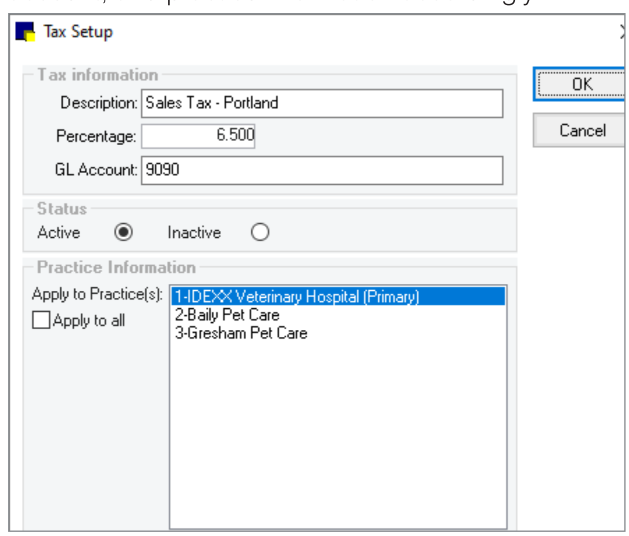
- Each cashier ID must have a unique password.
- If a staff member works at multiple practices, create a cashier ID for each location with consistent naming, for example the practice ID followed by initials (1RT, 2RT, 3RT). This will improve the display of cashier IDs or ID ranges on reports.



Sales tax by practice

If your practice locations use different sales tax rates, the sales tax can be applied based on the logged-in practice.

1. Go to **Controls>Taxes**, and then click **New** or **Update.**
2. Enter or modify the description, percentage, GL account, and practice information accordingly.



3. Click **OK**. Repeat as needed for each tax and practice.
4. To apply taxes to each invoice item, go to the **Lists>Invoice item>Tax/Disc** tab; to apply taxes to all items, go to **Tools>Mass Markup.** (**Note:** You can use Mass Markup only when no one else is logged in and no other instances of Cornerstone are running).

For more details, press **F1** or refer to *Reconfiguring Taxable Items*.

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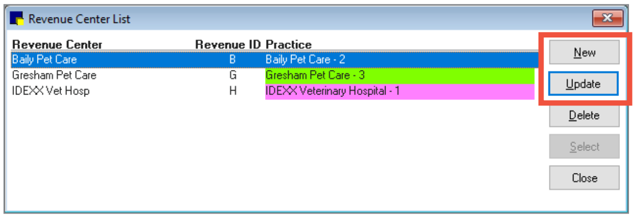
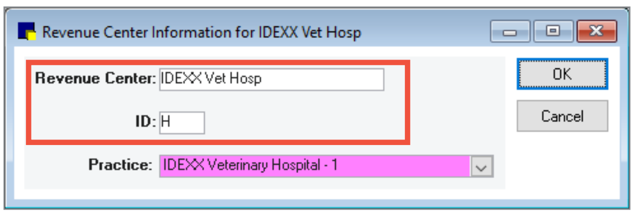
Creating or updating revenue centers

Assigning a revenue center to each practice enhances practice-specific reporting by separating sales, taxes (including different tax rates), and discounts. (Line item discounts are reported by revenue center on the end of period summary reports only.).

1. Go to **Lists>Revenue Centers**, and then click **New** or **Update**.



2. Enter a revenue center description and ID. Each ID must be unique among all the practices sharing the database.

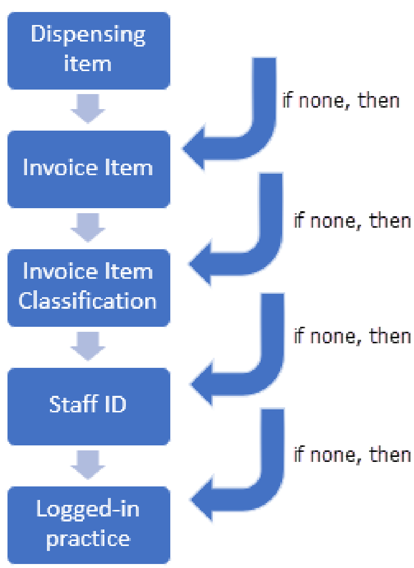


3. Select the practice name to associate with this revenue center, and then click **OK**.

Determining revenue centers

A revenue center is required for each item for an invoice, patient visit list, estimate, prescription label, diagnostic request, or appointment item.

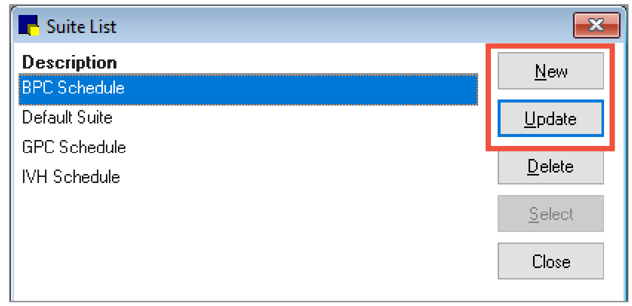
Based on your practice's MLSD configuration and practice type, revenue centers can be assigned at the item, classification, or staff level.



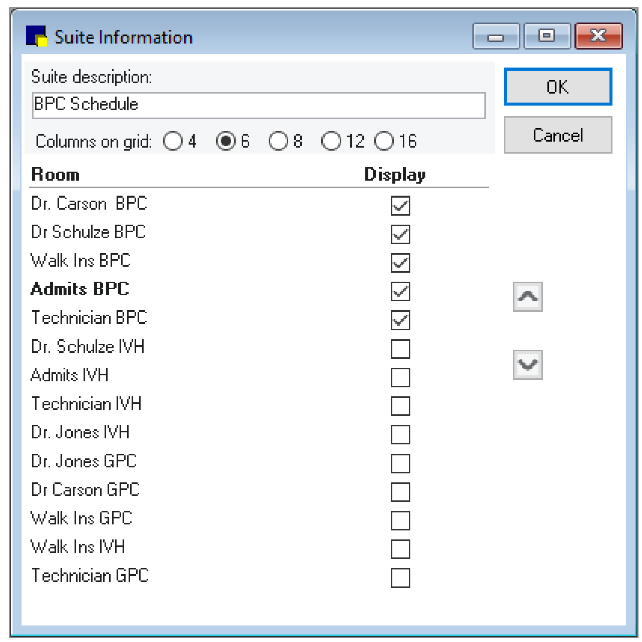
Creating appointment suites

You can create an appointment suite per practice to group practice-specific rooms in the Appointment Scheduler.

1. Go to **Controls>Appointment Scheduler>Suite Setup,** and then click **New** or **Update.**



2. Enter or modify the description, the number of columns to display on the grid, the rooms to display, and the order of rooms, accordingly.



3. Click **OK**. Repeat as needed for each appointment suite.

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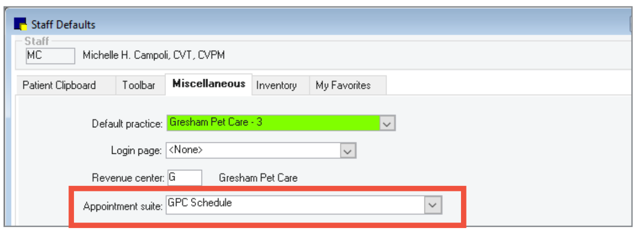
Designating appointment suites

An appointment suite can be applied based on logged-in staff. Similar to logging in to a default practice, Cornerstone looks first for the staff default setting; if none exists, the Appointment Scheduler default is used. If neither are found, the Default Suite is applied.

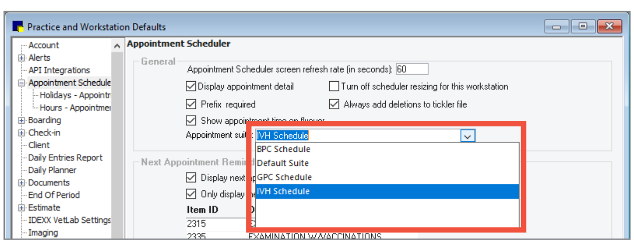
To assign a default appointment suite to a staff ID:

1. Go to **Controls>Defaults>Staff.**
2. Select the **Miscellaneous** tab.
3. Select the appointment suite for this staff ID.
4. Click **Save** to add an appointment suite for another staff ID, or click **OK** to save changes and close.



To assign a default appointment suite for all practices:

1. Go to **Controls>Defaults>Practice and Workstation**.
2. On the left, select **Appointment Scheduler.**
3. In the Appointment suite list, select the default appointment suite for the Appointment Scheduler and click **OK**.



Multi-Location/Single Database reports

Reports that display data by practice, which typically include client information, accounts receivable, or payments:

- Daily Payment Register – By Practice
- New Client Report – By Practice
- Daily Summary Report – By Practice†
- Monthly Sales Summary - By Practice†
- Yearly Sales Summary - By Practice†
- Accounts Receivable Report - By Practice
- Monthly Invoices and Statement
- Client/Patient Report Builder
- Census
- Client Account History

†Summary reports use a combination of client home practice, logged in practice, and revenue center.

Reports that display data by revenue center, which typically include sales information:

- Itemized Audit Trail for Revenue Center
- Serv. and Inv. Sales by Revenue Center
- YTD Net Sales by Center
- Sales Tax Summary - By Revenue Center
- Cost of Goods Sold by Center
- Referral Revenue Report by Rev Center
- Referral Summary by Revenue Center

For more information about using a Cornerstone Multi-Location/Single Database configuration, call a Cornerstone Support Representative at **1-800-695-2877**.