Frequently used tools

Starting the Cornerstone Software

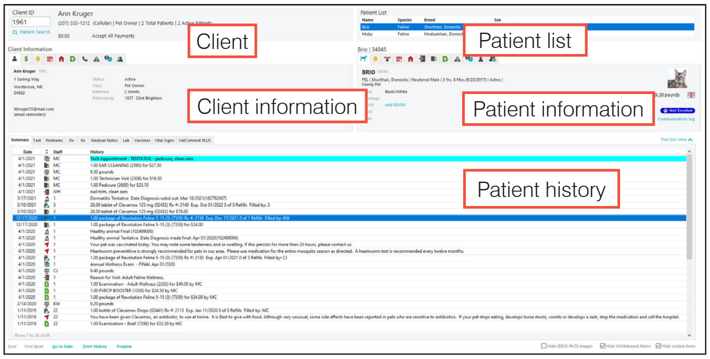
1. To open the Cornerstone* Software, do one of the following:
   - Double-click the **Cornerstone shortcut** icon on your desktop.
   - Click **Start** on the taskbar and then in the Apps list, click **Cornerstone>Cornerstone**.
2. In the **Log In** box, type your staff ID or select your name from the drop-down list; press **Tab** and type your password.
3. Click **OK** or press **Enter**.

Using the Patient Clipboard

The Patient Clipboard* gives you easy access to common tasks by using right-click menus, while keeping the general client and patient information available.

To access the Patient Clipboard:

1. Click the **Patient Clipboard** button in the toolbar. The Patient Clipboard is divided into these five areas:



2. In each area, right-click to display a menu of commands for that area.
3. To move from field to field, press **Tab**.

Tips:

- The patient history area can be displayed in normal view (shown above), in full size view, and with a preview pane for previewing medical notes, correspondence documents, and IDEXX Lab Reports.
- On each tab in the client information or patient information area, right-click to select from a menu of commands for the area.

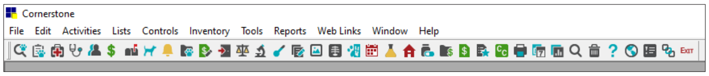
Tabs in the client area

	View or update basic **client information**, such as address and phone numbers.
	Access the client's **account information**.
	View or update **reminders** for the client's animals.
	View or update **scheduled appointments**.
	View or update **boarding reservations**.
	View or update **estimates** for the client.
	View or update the **client's phone numbers**.
	View or process **alerts** relating to the client. Icon is red if alert is present.
	View or update client-related **prompts and notes**.
	View or update **additional names** on the client's record.

Tabs in the patient information area

	View or update **patient information**, such as birth date and breed.
	View or update **reminders** for the selected patient.
	View or update the patient's **microchip ID, rabies/vaccine tag,** and **registration** information.
	View or update **appointments** for the selected patient.
	View or update **boarding reservations** for the selected patient.
	Check in a patient. If the patient is already checked in, details about the check-in are displayed.
	View or update patient items on the **Patient Visit List**.
	View or update **estimates** for the patient.
	View or process **alerts** relating to the patient. Icon is red if alert is present.
	View or update **patient prompts and notes**.
	View or update the patient's **ownership information**.
	View or update **referral information**.

Toolbar buttons



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

Keyboard shortcuts

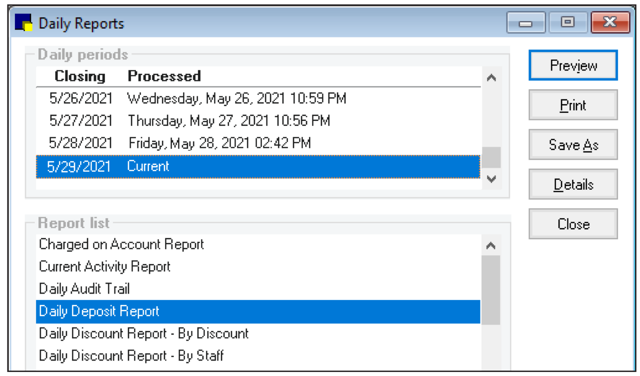
F1	Open on-screen Help.
F2	Search for and select from a list.
F3	Display Census List (checked-in patients).
F7	Move back through Client or Patient List.
F8	Move forward through Client or Patient List.
Ctrl+N	Create new item (e.g., invoice).
Ctrl+D	Delete highlighted field or blank record.
Ctrl+U	Update highlighted field.
Ctrl+L	Log out of Cornerstone.
Ctrl+Enter	Start new line in a text box.
Tab	Move to next field.
Shift+Tab	Move to previous field.

Daily tasks

Balance the drawer:

You can perform this procedure at any computer.

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



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

   OR

   If the drawer does not balance, print the **Daily Payment Register** or **Itemized Audit Trail** report to find the error and make corrections; then complete EOD processing.

Run EOD processing:

Perform these steps manually on the server or any workstation if not using unattended EOD. You cannot invoice or process payments during this process.

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

Print End of Day reports:

1. On the **Reports** menu, select **End of Period> End of Day**.
2. Under **Daily periods**, select the date of the daily reports you want to print.
3. Click **Print** to print default reports, or select an individual report and click **Print**.

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