Laboratory daily checklist for Cornerstone Software

It's important to check your Cornerstone* Software Lab Requests and Results 🧪 window **daily** for any outstanding requests or unresolved results that may have occurred. From this window you can:

- Assign orphan results to patient records and update billing items.
- Update not-requested billing items.
- Evaluate outstanding pending requests.
- Access the Patient Clipboard* from the right-click menu to review medical and billing information (Cornerstone Software 9.3 and later only).

Resolving these requests and results helps to ensure:

- All charges are captured correctly.
- Results are assigned correctly; tests results will not appear in patient records until not-requested and orphan results are resolved.
- Proper workflows are being followed.
- Invoice items are accurately set up and linked to the correct profile.

Note: If outstanding pending requests and/or not-requested results persist for the same tests, ensure that the correct profile is linked. For help, double-click the item row and then press F1.

Why do I have unresolved requests and results?

Use this table to learn how to resolve orphan results, not-requested results, and unresolved pending requests.

	Cause	Solution

Orphan results	You did not create a request within the Cornerstone Software, so there was no request to match the results.
	
	Possible reasons:
	• Sending a paper form to IDEXX Reference Laboratories
	• Submitting a request from vetconnectplus.com
	• Deleting a request after the laboratory receives the sample, without informing the lab
	• Deleting a reference lab request prior to pickup but still submitting the sample and the form
	• Client or patient information could not be matched to a request (the information changed after the request was made)
	
	Example:
	Dr. Blinker used VetConnect* PLUS to submit an IDEXX Reference Laboratories request for a Canine Senior Profile. Since his request was not made directly in Cornerstone Software, the results came back with an Orphan status.
		Preventing orphan results:
		Always create laboratory requests within the Cornerstone Software.
		
		Resolving orphan results:
		
		1. From the Lab Requests and Results 🧪 window, double-click the orphan row or highlight it and click **Update**.
		
		2. Using the patient and request details in the **Lab Work Information** pane at the bottom of the window, assign the results to the correct patient in the **Patient Information** area.
		
		3. Determine billing status by reviewing the patient **Summary** tab on the Patient Clipboard for billed items and then do one of the following:
		  • Leave **Bill this client** selected and then complete the **Invoice Item ID** field if no billed item is verified.
		  • Select **Do not bill this client** if a billed item is verified or instructions are to not bill.
		
		4. Click **OK** to save your changes.

	Cause	Solution

Not Requested results	More results were received than were requested.
	
	Possible reasons:
	• Calling the reference laboratory to add additional tests without updating the request in Cornerstone
	• Performing additional tests without a request or entering a request directly on the IDEXX VetLab* Station
	• Updating a reference lab request prior to pickup but including the original, instead of the updated, form
	• An item was not linked to the correct profile
	
	Example:
	Dr. Blinker requested an in-house CBC through Cornerstone Software. As his technician ran the test, Dr. Blinker also asked her to run a Chem 10 profile. She ran the Chem 10 without updating the request in Cornerstone Software, causing the results to come back with a Not Requested status.
		Preventing not-requested results:
		Always update the original request within the software before running additional tests. Ensure items are linked to the correct profile.
		
		Resolving not-requested results:
		
		1. From the Lab Requests and Results 🧪 window, double-click the not-requested row or highlight it and click **Update**.
		
		2. Determine billing status by reviewing the patient **Summary** tab on the Patient Clipboard for billed items and then do one of the following:
		  • Leave **Bill this client** selected and then complete the **Invoice Item ID** field if no billed item is verified.
		  • Select **Do not bill this client** if a billed item is verified or instructions are to not bill.
		
		3. Click **OK** to save your changes.

Unresolved pending requests	Fewer results were received than were requested. **Possible reasons:** • Calling the reference laboratory to cancel tests without deleting the request • Not performing all tests ordered on the IDEXX VetLab Station • Connection problems prevented results from being imported • An item was not linked to the correct profile • Deleting and re-creating a request but submitting the sample with the previous requisition form	**Preventing unresolved pending requests:** • Always update the original request within the software. • Perform all tests. • Ensure items are linked to the correct profile. **Resolving lingering pending requests:** **Note:** Delete a request only if no results are expected. Deleting a request for which results are later received will cause orphan results. 1. Evaluate the cause (refer to the list on the left) to determine whether the request is still valid. If the request should be deleted, continue to step 2. **Note:** For connection problems, go to **Activities>Lab Work>Lab Results Log** to verify that results are being imported. Call Cornerstone Customer Support, if needed. 2. From the Lab Requests and Results 🧪 window, right-click the pending request, and then click **Delete**. 3. When prompted to confirm, click **Yes**. The associated billing items are removed from the Patient Visit List. If the billing items cannot be removed, a message alerts you to validate your charges.

Find this guide

Look under "Resources by Topic" on the Cornerstone Help page.

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