IDEXX **Cornerstone***

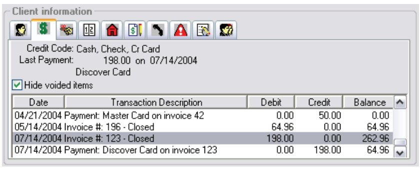
Practice Management System

This quick reference guide applies to Cornerstone 8.1 and higher. If you are using a previous version, some features and windows may vary from those shown here.

Printing | QUICK REFERENCE GUIDE

Reprint an Invoice

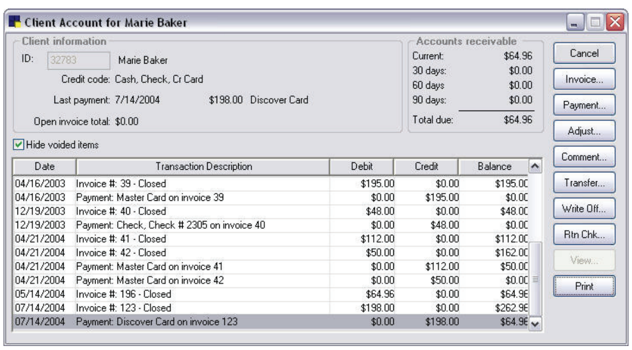
1. On the Patient Clipboard*, in the **Client ID** field (top left corner), type the client ID or press F2 to search for and select the client.
2. In the *Client information* area, click the **Account Information** tab.



3. Double-click the invoice you want to reprint. The invoice information displays in the Client Invoice window.
4. Click **Print**.

Print a Client Account History Report

1. With the client selected on the Patient Clipboard, right-click in the *Client* area and select **Client Account**. The Client Account window appears.



2. Click **Print**. The Client Account History window appears.
3. If desired, change the *Sort order* for the report and narrow the report results by specifying a *Range* to print.
4. Click **Preview** or **Print**.

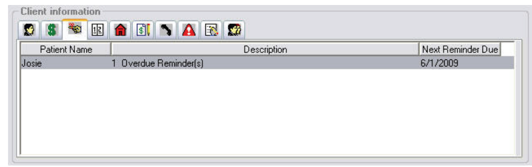
Print a Patient History Report

1. With the client and patient selected on the Patient Clipboard, click the **Print History** button (at the bottom of the Patient Clipboard). The Patient History Report dialog box appears.
2. If desired, change the *Sort order* for the report.
3. Narrow the report results by specifying a *Range* to print.

   Note: If a range is not specified, Cornerstone will include medical history data for all patients. If you have a large database, this report may take a long time to generate.
4. In the *History* area, select the types of history information to include in the report (highlighted/shaded lines are selected).
5. Click **OK**. A preview of the report is displayed.
6. Click **Print**, then click **OK**.

Print a Patient's Reminders

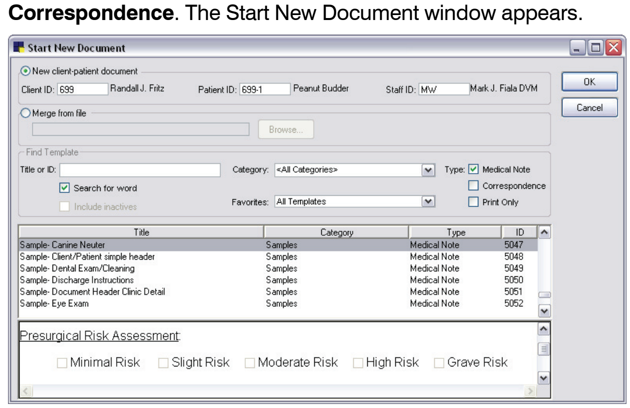
1. With the client selected on the Patient Clipboard, in the *Client information* area, click the **Reminders** tab.



2. Right-click on the patient name for which you want to print reminders, then select **Update**. The Patient Reminders dialog box appears.
3. Click **Print**.
4. From the popup menu that displays, select **Selected Patient Only**, and then select either **Reminder Letter Report** or **Reminder Recall Report**.
5. If desired, change the *Sort order* for the report and narrow the report results by specifying a *Range* to print.
6. Click **Preview** or **Print**.

Print a Correspondence Document

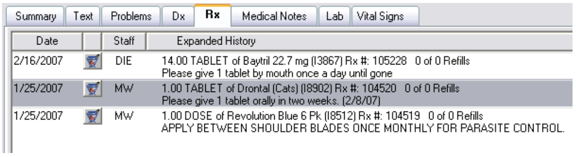
1. With the client and patient selected on the Patient Clipboard, in the *Patient list* area, right-click the patient name and select **Correspondence**. The Start New Document window appears.



2. If a default staff has not been designated in Patient defaults, enter the **Staff ID** and press TAB.
3. Use the fields in the *Find Template* area to locate the desired template.
4. Select the template to use to create the document and click **OK** (or double-click the template). The template opens in the Cornerstone Editor.
5. Edit the document as needed using the Cornerstone Editor tools.
6. When you are ready to print the document, click the **Print** button on the Editor Toolbar.

Reprint a Prescription Label

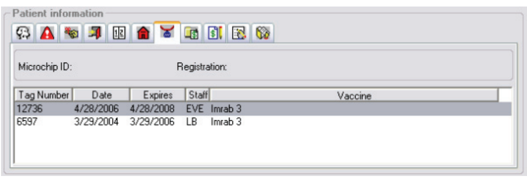
1. With the client and patient selected on the Patient Clipboard, click the **Rx** tab in the *Patient History* area.



2. Double-click the prescription.
3. Click **Print**.

Print a Duplicate Rabies Certificate

1. With the client and patient selected on the Patient Clipboard, in the *Patient information* area, click the **Tags/Microchip ID**  tab.



2. Double-click the rabies tag you want to reprint.
3. Click **Print**.

Note: In Cornerstone 8.1 and above, to issue a *new* rabies certificate for a patient you must invoice an item that has been set up to initiate the **Vaccine Tag** special action. When this item is invoiced, the Vaccine Tag window appears, allowing you to enter information for the tag and print a rabies certificate for the patient.

Reprint an X-Charge Credit/Debit Card Transaction Receipt

In Cornerstone 8.1 and above, Cornerstone Payment Solutions works with X-Charge® software to process credit and debit card transactions through an Internet connection. If this integrated payment processing solution has been set up in your practice, you can use the X-Charge **Transaction Lookup** feature to print a copy of a receipt or a transaction detail report for a selected transaction.

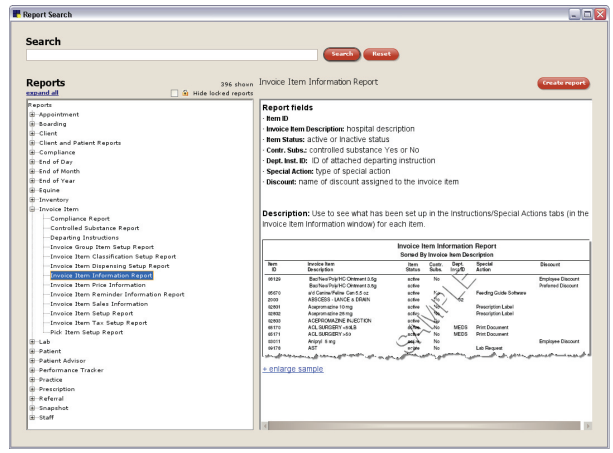
Note: Receipts can be printed for approved transactions only.

1. In the X-Charge software (**Start** > **Programs** > **X-Charge** > **X-Charge**), click the **Lookup** button.
2. Use the available fields to specify a date range or batch number for the desired transaction, and then click the **Search** button.
3. Select the desired transaction in the list, and then click the **Receipt** button. The receipt information displays in a receipt preview window.
4. Click the printer icon on the toolbar to print a copy of the receipt.

Create and Print (or Save) a Report

Creating a Report

1. On the **Reports** menu, select **Find a Report**. The Report Search window appears.
2. Do one of the following to find the desired report:
   - In the **Search** text box, type a search keyword or phrase and click **Search**. The top five report matches are displayed in ranked order within their expanded report groups. The top ranking report is automatically selected in the tree.
   - In the Reports list, click a plus sign [+] to open a report group and display the reports (or subgroups) within it and browse through the reports.
3. Click on a report in the Reports list to view the report details and a sample in the right-side pane.



4. If desired, click +enlarge sample (located below the report sample image) to view a full-page preview of the sample report.
5. To create a report, double-click the report name in the Reports list or highlight it and click **Create report**. (Note: For Inventory reports, click **Create report** and then click **Run**.)
6. Depending on the type of report you are creating, different options are available. For standard Cornerstone reports, a Filters dialog box appears. If applicable, set the *Sort order* and specify a *Range* to filter the information that displays on the report.
7. Do one of the following:
   - Click **Preview** to view the report in the Reports Preview window.
   - Click **Print** to set print options and print the report.
   - Click **Save As** to specify a file name and type for saving the data to a file.

Saving a Report as a PDF (Portable Document Format) File

1. Create a report and click **Print**. The Cornerstone Print Options dialog box appears.
2. Click **Printer**, select the **Cornerstone PDF** printer, and click **OK**.
3. Click **OK** again. The Save As dialog box appears.
4. Specify a location and file name for the PDF file, then click **Save**.

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