IDEXX Cornerstone®

A User Guide for

IDEXX Cornerstone® Boarding and Grooming

IDEXX VetConnect Systems

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How to Use and Navigate the User Guide

View the user guide on your computer and/or print all or selected parts of it.

Bookmarks

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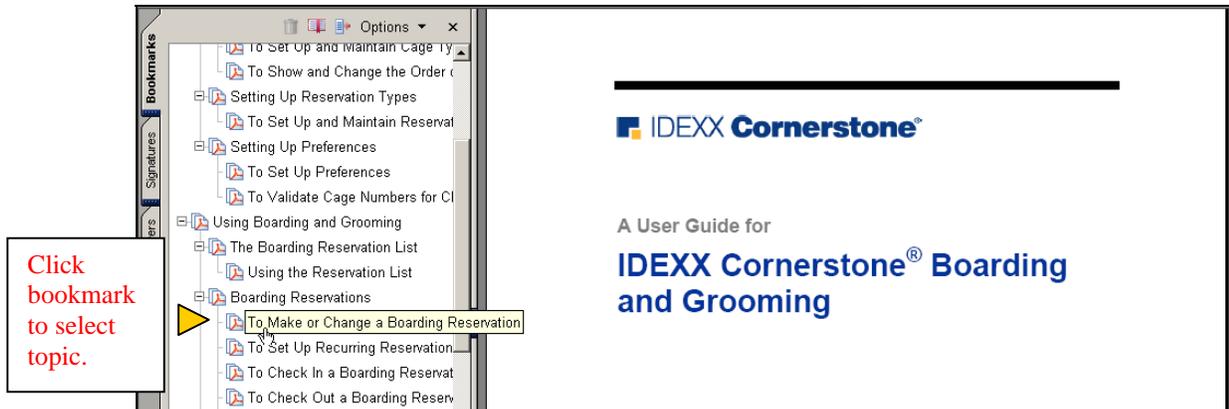
Select topic

Within a topic, move the open hand cursor 🖑 over a cross-referenced topic. When the open hand cursor changes to a pointed hand cursor (see below), click to view the cross-reference.

Sample text with cross-reference

To attach an invoice item to a profile, use the special actions option (below) or add the invoice item to a profile. (See "Maintain profiles" on page 46.)

Toolbar buttons

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Overview of IDEXX Cornerstone® Boarding and Grooming

Although IDEXX Cornerstone Boarding and Grooming software is an optional module that is sold separately, it is started from within the IDEXX Cornerstone® Foundation practice management system like many other practice management activities.

It uses Cornerstone Foundation invoice items and charges. When a patient is checked out, these invoice items and charges are transferred to the Patient Visit List for invoicing and accurate record keeping.

It works with IDEXX Cornerstone Appointment Scheduler to allow you to schedule grooming appointments for patients during their boarding stays.

To help manage your boarding facility and grooming appointments, IDEXX Cornerstone Boarding and Grooming software provides you with a range of useful reports that are accessed and printed through the Cornerstone Foundation Reports menu.

Setting Up Boarding and Grooming

Boarding and Grooming Set Up Checklist

Cornerstone Boarding and Grooming software draws information from and uses several lists in the Cornerstone Foundation and Cornerstone Appointment Scheduler database. Be sure these items are set up before proceeding to set up Boarding and Grooming items. For more information on setting up Cornerstone Foundation and Appointment Scheduler items, see the applicable section of your *IDEXX Cornerstone Reference Manual*.

Cornerstone Foundation Items Used By Boarding and Grooming

❑ Staff ID's

❑ Staff Classifications

❑ Invoice Items for Boarding & Grooming

❑ Rooms

❑ Reason for Visit

Cornerstone Appointment Scheduler Items Used by Boarding and Grooming

❑ Practice Hours

❑ Holidays

❑ Groomers' Schedules

❑ Templates

❑ Staff Setup

Cornerstone Boarding and Grooming Module Items

❑ Boarding Facility Holidays

❑ Cage Types

❑ Reservation Types

❑ Preferences

Setting Up Holidays

Use the Boarding Facility Holidays feature to define when the boarding facility is open on holidays. These hours are scheduled independently of those for the veterinary practice.

Note Boarding holidays must be set up specifically for each year (they do not automatically carry over to the next year). If you use a five-year calendar to set up holidays in advance, you will not have to remember to do this every year.

To Set Up and Maintain Boarding Facility Holidays

1 From the Cornerstone Foundation **Activities** menu, select **Boarding** then select **Boarding Facility Holidays**. The Boarding Facility Holidays window displays.
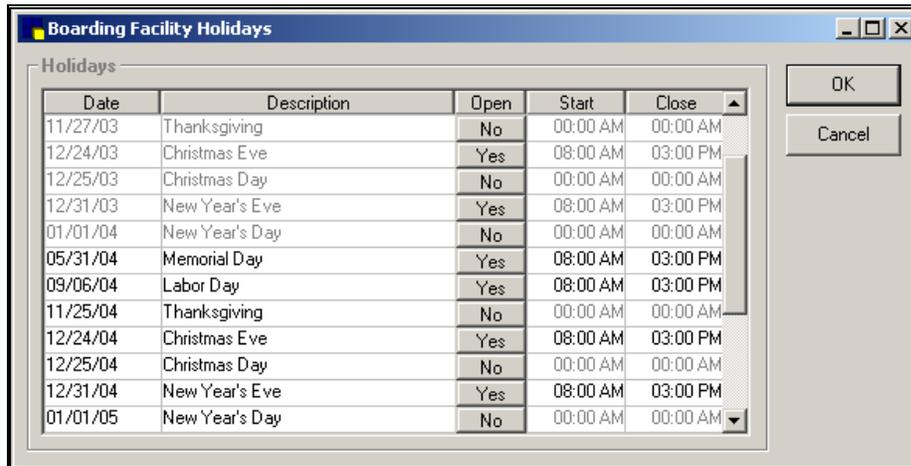
Boarding Facility Holidays window

2 In the **Date** field, enter or edit the date of the holiday (or press **F2** to use the Calendar Tool) and then press **Tab**.

3 In the **Description** field, enter or edit the name or description of the holiday.

4 If the boarding facility will be open for check in and check out on a holiday, click **No** in the **Open** field for that holiday to change the **No** to **Yes**. The standard office hours for that date (set up in Appointment Scheduler) appear in the Start and Close fields.

5 In the **Start** and **Close** fields, enter the start and close times for the boarding facility if different from the practice hours for that date.

6 Click **OK**.

Note To remove a holiday from the list, select a field in the holiday line that you want to delete and press **Ctrl+D**.

Setting Up Cage Types

Cage types define the kind of boarding units available in the boarding facility. You can specify the number of available cages and the number of overbooked reservations that are allowed. You can link invoice items to the cage type for billing.

To Set Up and Maintain Cage Types

1 From the Cornerstone Foundation **Activities** menu, select **Boarding** and then **Cage Types**. The Cage Types window displays.
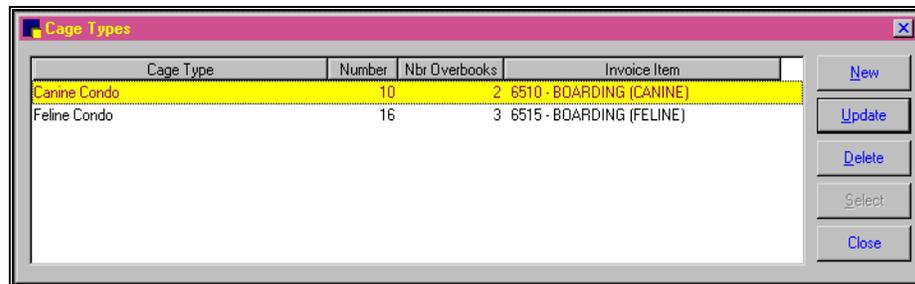
Cage Types window

2 Select one of the following options:

- To add a cage type, click **New**. The Cage Information window (below) displays.

- To change cage type information, click the cage type that you want to change and then click **Update**. The Cage Information window (below) displays.

- To delete a cage type record, click the cage type that you want to delete and click the **Delete** button.
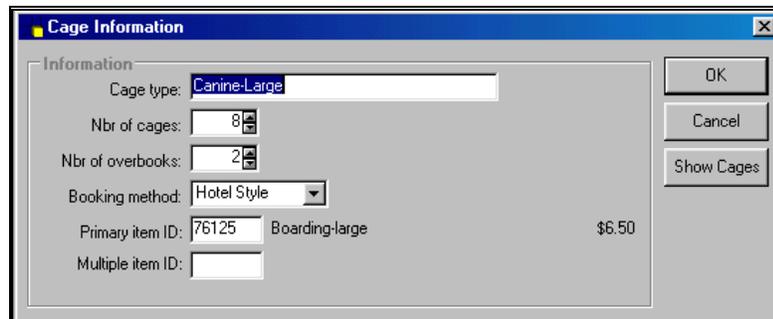
Cage Information window

3 In the **Cage type** field, enter a cage type description.

4 In the **Nbr of cages** field, enter (or use the arrows to select) the number of cages of this type that are available for boarding. If you use a room or play area instead of a cage for day care or training, enter the number of pets allowed in the room or play area.

Note When you add a cage to your boarding facility, increase this number. If you use the **Assign cage numbers** option, an extra field is created in the Cage numbers list when you increase the number of cages. To assign a specific name to a new cage, see "To Show and Change the Order of Cages for a Cage Type" on page 7.

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5 In the **Nbr of overbooks** field, enter (or use the arrows to select) the number of overbooked boarding reservations to allow for this cage type.

Hotel style reservations are for more than one day. Daycare style reservations are for a single day.

6 In the **Booking method** field, from the pull-down list, select **Hotel style** if the cage type is used for reservations that are for more than one day. Select **Daycare style** if the cage type is used for reservations for a single day. The booking method determines the billing style (set up in Reservation Types).

7 In the **Primary item ID** field, enter (or use **F2** to select from the Cornerstone Invoice Item list) the invoice item to link to this cage type. The linked primary invoice item assesses the charge for occupancy of the cage type and is automatically included on the reservation when one of the following occurs:

- The cage type *is not* shared by multiple pets.

- The cage type *is shared and one of the primary pet options in Preferences is selected*. If one of the primary pet options is selected, the primary invoice item and its charge are placed on the reservation for the primary pet. For example, if the primary invoice item includes a charge of $7.50, the primary pet is charged $7.50 for cage occupancy. See "To Set Up Preferences" on page 11.

The multiple item ID field is only used if a cage type allows pets to share cages

8 In the **Multiple item ID** field, if this cage is not shared, leave this field blank. If it is shared, enter (or use **F2** to select from the Cornerstone Invoice Item list) the invoice item to link to this cage type. The linked invoice item

assesses the charge for occupancy of the cage type and is automatically included on a reservation when one of the following occurs:

- More than one pet share a cage and each pet is charged the same multiple fee for cage occupancy.

- More than one pet share a cage and the first pet is charged a primary fee and each additional pet is charged the multiple fee.

9 Click **OK**.

To Show and Change the Order of Cages for a Cage Type

The Show Cages option allows you to assign specific cage numbers and set the order in which you want cages occupied.

Show Cages

To assign cage numbers and/or set up the order in which you want cages occupied:

1 In the Cage Information window, click the **Show Cages** button. A cage number description list displays.

To fill cages in a predetermined order, move the cage numbers up or down by clicking the up arrow or down arrow button until cages are listed in the order in which you want them occupied.

Initially, you can automatically name cages in the cage list. In the cage position *at the top* of the list, type a new cage description and press **Tab**.

A dialog box displays asking if you want to automatically name all cages in the same format. If you select **Yes**, all cages (except overbooks) are named in the new format.

	Cage Description
1	CL3
2	CL1
3	CL2
4	CL4
5	CL5
6	CL6
7	CL7
8	CL8
9	OB1
10	OB2

Cage Information window

Cage type: Canine-Large
Nbr of cages: 8
Nbr of overbooks: 2
Booking method: Hotel Style
Primary item ID: 76125   Boarding-large $6.50
Multiple item ID:

OK   Cancel   Hide Cages

Cage Information window (with Show Cages selected)

2 Click the **Cage Description** field that you want to name and type a description for the cage. Press **Tab** to go to the next Cage Description field.

Note Initially, you can automatically name cages in the cage list. In the cage position *at the top* of the list, type a new cage description and press **Tab**. A dialog box asks if you want to automatically name all cages in the same format. If you select **Yes**, all cages (except overbooks) in the list are named in the new format.

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3 To fill cages in a predetermined order, move the cage numbers up or down by clicking on the up arrow or down arrow button until cages are listed in the order in which you want them occupied. For example, if you want to fill cage 3 (in our example, CL3) first, click CL3, then click the up arrow button until CL3 is at the top of the cage list.

4 Click the **Hide Cages** button when you no longer want to view the cage list.

Note To activate this feature, from the **Activities** menu, select **Boarding**, then **Preferences**. At the Assign Cage Number check box, click the box. A ✓ appears in the box, indicating the Assign Button on the Reservation screen is activated. Then, when you make or check in a reservation, on the reservation screen, click the **Assign** button, and the first available cage on the cage list is automatically assigned to the pet.

Setting Up Reservation Types

Reservation types allow you to do the following:

- Define charging frequency.

- Define booking method.

- Define default feeding, exercise, medication, and other services that are included with boarding.

- Specify how the system bills for the cage.

- Specify invoice items associated with the reservation type.

Invoice items specified for the reservation type are transferred to the boarding instructions for the reservation and are printed on the boarding reports.

To Set Up and Maintain Reservation Types

1 From the Cornerstone Foundation **Activities** menu, select **Boarding** then select **Reservation Types**. The Reservation Types List dialog box displays.

2 Select one of the following options:

- To add a new reservation type, click **New**. The Reservation Type Information dialog box displays.

- To change information for an existing reservation type, click the reservation type that you want to change then click **Update**. The Reservation Type Information dialog box displays.

- To delete a reservation type record, click on the reservation type you want to delete and click **Delete**.

Reservation Type Information window

3 In the **Description** field, enter or edit the description for the reservation type.

4 In the **Number of times to charge for cage** field, from the pull-down list, select how often to charge the

client for the cage (once per visit, once each hour, once each day, or once each time it passes the cutoff time).

⬛ **Example**   If **Once each day** is selected, the client is charged for each day his or her pet occupies a cage even if the pet occupies the cage for only part of the day. For example, if the pet occupies the cage from 5:00 P.M. Wednesday to 10:00 A.M. Thursday, the client is charged for two full days.

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5   In the **Booking method** field, use the pull-down list to select the booking method for this type of reservation (**Hotel style** or **Daycare style**).

Check-in Report/Document Preferences

6   Place a ✓ in the **Print check-in report** check box to automatically print a Check-in report when patients are checked in.

7   If you choose to print a boarding document, in the **Doc ID** field, enter the ID of the document you want to print or press **F2** to select it from the Correspondence List.

Note   A cage card, a cage label, a boarding release form and boarding activity sheet are included with your software and can be selected from the Correspondence List. See "Print Boarding Documents" on page 46.

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8   Place a ✓ in the **Charge Items based on frequency** check box if you want to charge for each time an invoice item or service is provided. For example, if the feeding instructions for a reservation type indicate that the pet should receive one can of dog food (at $1.24 per can) twice a day, based on frequency (twice), charges for feeding the pet for one day would be $2.48.

Note   If you have set your reservation type to charge once each hour, the instruction quantity remains one.

These invoice items are automatically transferred to the Boarding Instructions list when a reservation is booked for this reservation type.

9   Add invoice items you want linked to the reservation type or change information for invoice items already linked to the reservation type.

- Select the item **Type** from the pull-down list (feeding, exercise, medication or other).

- Enter the **Item ID** (press **F2** to select from the Invoice Item List).

- Select the **Frequency** of providing the item (once, daily, daily AM, daily PM, twice a day, three times a day or every other day).

- Enter the **Staff ID** (press **F2** to select from the Staff List) of the staff member who usually provides boarding items.

10 When finished, click **OK**.

Setting Up Preferences

Preferences are default settings (usually the most commonly used choice) that the program uses to automatically enter information into window and dialog box fields to save you time. Defaults can be left blank if you choose not to use them.

To Set Up Preferences

1 From the Cornerstone Foundation **Activities** menu, select **Boarding**, then select **Preferences**.

Boarding/Grooming Preferences window

2 In the **Default hotel style check-in time** field, enter the default check-in time to use when making hotel style boarding reservations.

Note   When a hotel style reservation is made for a pet, the check-in time that you enter in this field is automatically placed in the Arrival field on the reservation. You can choose to accept it or you can enter a different arrival time on the reservation.

3 In the **Default hotel style check-out time** field, enter the default check-out time to use when making hotel style boarding reservations.

Note   When a hotel style reservation is made for a pet, the check-out time that you enter in this field is automatically placed in the Departure field on the reservation. You can choose to accept it or you can enter a different departure time.

4 In the **Default daycare style check-in time** field, enter the default check-in time to use when making daycare style boarding reservations. Daycare style reservations are reservations with check in and check out occurring on the same date.

Note   When a daycare style reservation is made for a pet, the check-in time that you enter in this field is automatically placed in the Arrival field on the reservation. You can choose to accept it or you can enter a different arrival time.

5 In the **Default daycare style check-out time** field, enter the default check-out time to use when making daycare style boarding reservations.

Note   When a daycare style reservation is made for a pet, the check-out time that you enter in this field is automatically placed in the Departure field on the reservation. You can choose to accept it or you can enter a different departure time.

6 In the **Default reservation type** field, from the pull-down list, select the default reservation type to use for making boarding reservations.

7 In the **Default staff ID** field, select the staff ID for the staff member who usually provides boarding services (or press **F2** to select from the Staff List).

8 **IMPORTANT** Before you select Assign cage numbers (below), you must set up cage numbers for your practice in your cage type records. To do this, see "To Show and Change the Order of Cages for a Cage Type" on page 7.

To automatically assign cage numbers, place a ✓ in the **Assign cage numbers** check box by clicking it. This allows you to do the following:

- Automatically assign cages when making or checking in reservations.

- Activate the Reservation Book so that you can view cage reservations by cage numbers and dates.

- Select and assign a cage when viewing the Reservation Book.

- Activate a Cage # field on the Blocked Cages screen. Pressing F2 in the Cage # field allows you to access the Reservation Book and from it select the cage you want to block.

⮌If the Assign cage numbers option is selected, the system *does not* let you check in a reservation without first assigning a cage number.

Note When you click in the Assign cage numbers check box to select this option and pets are already checked in for boarding, the system displays a list of the checked-in pets and prompts you to enter valid cage numbers for them. See "To Validate Cage Numbers for Checked-In Patients" on page 15.

Cage Sharing Preferences

9 In the Sharing section, select one of the following fee options.

- Select **Use primary fee for first pet** if none of your cages are shared or if cages are shared, but you only want to charge one fee for the cage and not assess a separate fee for each pet sharing the cage. For

example, if this option is selected and the cage is shared, the same price is charged for cage occupancy whether one pet or five pets occupy the cage. This is the default selection.

- Select **Primary fee for first, multiple fee for all others** if cages are shared and you want to charge a separate fee for the first pet and a different fee for additional pets that occupy a cage.

- Select **Use multiple fee for each pet** if cages are shared and you want to charge a fee for each pet occupying the cage.

Note   You can automatically link an invoice item with the fee to charge for cage occupancy, depending on whether a primary fee, a multiple fee or both is charged. Then each time a reservation is made for a cage, the invoice item and its price is automatically included on the reservation. If necessary, this invoice item and price can be changed. To set up linked invoice items, see *Primary item ID* on page 6 and *Multiple item ID* on page 7.

Round Down Hourly Charge Preferences

10 Your system calculates charges based on 15, 30 or 60-minute increments. Choose how you want to round time that is not a full 15, 30, or 60-minute increment. If you choose to round down to 15 minutes, the client is charged for 15 minutes only after the entire 15 minutes has past. For example, if a pet is checked in at 1:00 p.m. and checked out at 6:12 p.m. the same day, the charges are calculated for 5 hours, not 5 ¼ hours if you choose the 15-minute round down option.

Note   The **Round down hourly charge** options *only apply* to reservations of a reservation type for which the number of times to charge for a cage is set to **Once each hour**.

Grooming Appointment Preferences

11 In the **Default reason for visit** field, from the pull-down list, select the default reason for visit to use for making grooming appointments.

12 In the **Default staff classification** field, from the pull-down list, select the default staff classification to use for making grooming appointments.

13 In the **Rooms to use for grooming** section, select **Yes** for each room you use for grooming appointments. These rooms are used when searching for available grooming appointments.

14 When finished, click **OK**.

To Validate Cage Numbers for Checked-In Patients

When you click the **Assign cage numbers** check box to activate this feature, a list of checked-in pets and their cage numbers is displayed, prompting you to update cage numbers on the Checked-in list so that they match cage descriptions on the Cage Number list. (The Cage Number list must be created *before* clicking the Assign cage numbers check box.) For more information about the Cage Number list, see

The system checks each pet's cage number and stops at cage number fields that do not match cage descriptions on the Cage Number list.

To update cage numbers:

1 In the **Cage #** field, type a valid cage description for the cage. (This is found on the Cage Number list.)

2 Repeat until all Cage # fields are updated.

3 When finished, click **OK**.

Tip If your practice previously did not assign cage numbers or the Checked-in list is long and you are unsure of the cage numbers of checked-in pets, click the **Print** button and the Checked-in list prints. Click **Cancel** to exit. Determine the correct cage numbers for the pets and write them on the printed list. Return to the Preferences screen, click the Assign cage numbers check box again, and enter correct cage numbers.

Using Boarding and Grooming

The Boarding Reservation List

The Reservation List window is the main window for Cornerstone Boarding and Grooming. From it you can do the following:

- Review reservations by date, cage type and status.
- Start new reservations.
- Update or delete existing reservations.
- Print a Check-in Report and/or print a cage card.
- View a Census List showing all patients with a boarding and grooming checked-in status.

Using the Reservation List

Reservation List toolbar button

1 To go to the Reservation List window, select one of the following options:

- On the toolbar, click ⌂.
- From the Cornerstone Foundation **Activities** menu, select **Boarding** then select **Reservation List**.

Press **F2** here to view cage availability.

The Reservation List can be sorted by any of the heading tabs (Cage, Patient ID and Name, Owner Name, Arrival, Departure, etc.). To sort, click the heading tab.

Numbered blocks are the same color for all pets sharing the same cage.

Reservation List window

2 In the **Select cage/date** section, click the cage type for which you want to view reservation information. You can select more than one cage type. The default is <All Cages>. To view the cage availability graph, press **F2**.

Click the single arrows to move the calendar forward or backward one day. Click the double arrows to move the calendar forward or backward one week.

3 Enter the date for which you want to view reservation information (or press **F2** to use the calendar tool). The default is today's date.

Note If cages are booked for the selected date, a green color bar displays behind the cage type text, indicating the availability of bookings for the cage type. A longer color bar indicates more bookings for the cage type. If the cage type is overbooked, a red square at the end shows the number of overbooks.

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4 In the **Select status** section, select which type of reservations to view by checking the box to the left of the status description (scheduled, checked-in, checked-out, no show, cancelled). By default, scheduled and checked-in reservations display.

5 In the **Client ID** field, enter the client's ID number and press **Tab** (or press **F2** to select from the Client List). All of the client's prior and future reservations for the selected status (scheduled, checked-in, checked-out, no show, cancelled) can be displayed by checking the status boxes.

Note If you have Appointment Scheduler, in the **Client ID** field, press **F3** to view a Census List showing all patients with a checked-in status for boarding and grooming.

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6 Select one of the following options:

- To make a new reservation, click **New**.

- To update a reservation on the list, click the reservation that you want to update and click **Update**.

- To delete a reservation on the list, click the reservation you want to delete and click **Delete**. The Delete Reservation dialog box displays. Select the reason you want to delete the reservation (no show, cancelled, delete) and click **OK**. If the reservation is a recurring reservation, choose whether you want to delete all occurrences of the recurred reservation or

only the selected reservation. See "To Delete Boarding Reservation Information" on page 26.

- To recur a reservation, highlight the reservation that you want to recur and right-click. From a pop-up menu, select **Recurring Reservations**, then select the recurring time interval (Daily, Weekly, Monthly, Yearly) for the recurring reservation, or select **Print a recurring reservation report** to print a list of recurring reservations and grooming appointments (if applicable) for the client. See "To Set Up Recurring Reservations and Grooming Appointments" on page 23.

- Click a reservation on the list and right-click. A pop-up menu appears. From the menu, make a new reservation, update the existing reservation, delete the reservation, or if the reservation is checked-in, reprint a Check-In Report, print a cage card or print both.

7 To exit the Reservation List window, click **Close**.

Boarding Reservations

You can do the following when making boarding reservations:

- Include multiple patients on one reservation.
- Allow patients to share cages and bill accordingly.
- Add invoice items to the reservation to bill for products and services provided during the patient's stay.
- Set up special instructions for the care and feeding of the patient.
- Schedule a grooming appointment.

To Make or Change a Boarding Reservation

1 Select one of the following options:

- On the Reservation List window, click **New** to make a reservation.

- From the Cornerstone Foundation **Activities** menu, select **Boarding** and then select **Make Reservation**.

- On the Reservation List window, click the reservation you want to change, check in, check out, or confirm and click **Update**. The Reservation Information window displays.

Reservation Information window

2 If this is a new reservation, in the **Client ID** field, enter the client's ID (or press **F2** to select from the Client List) and press **Tab**. The client's personal information, A/R information, and a list of patients belonging to the client display.

Note If set up to do so, an alert appears if a client previously cancelled a grooming appointment, boarding reservation, or was a no show. Click **OK** to continue *OR* if you want to remove the no show and/or cancelled information from the alert, select the no show or cancelled line you want to remove, click **Process** and enter zero in the **No show** and/or **Cancelled** field.

Reservation numbers are automatically assigned. The assigned number does not appear in the field until the reservation is saved.

3 If this is a new reservation, in the **Reservation #** field, press **Tab**. The system automatically assigns a reservation number. If the client has any reservations currently scheduled, the system asks if you want to schedule a new reservation.

4   In the **Reservation type** field, select the type of reservation from the pull-down list.

5   In the **Arrival** field, enter the arrival date for this reservation (or press **F2** to use the calendar tool to select the date). If necessary, change the default arrival time to reflect patient's actual arrival time.

6   In the **Departure** field, enter the departure date for this reservation (or press **F2** to use the calendar tool to select the date). If necessary, change the default departure time to reflect patient's actual departure time.

7   In the **Confirm** field, if this is a new reservation, press **Tab** to skip. If this is a reservation that a client is confirming, click the **Confirm** button. This enters the current date and time in the Confirm field. Clicking the Unconfirm button clears the Confirm field.

Note   On the Reservation List, an * displays after *scheduled* for all confirmed reservations.

8   In the **Made by** field, enter the **Staff ID** of the staff member making the reservation (or press **F2** to select from the Staff List).

9   To add a pet to the boarding reservation, highlight the pet you want to include on the reservation, and click the **Include on reservation** check box to add this pet to the boarding reservation.

10   If the client is boarding multiple pets and wants the pets to share a cage:

   • Repeat step 9 until all of the client's pets are included on the reservation.

   • Click the **sharing** check box to select the last pet included on the reservation as the primary pet; otherwise, from the list of patients in the Patient box, select the pet you want to designate as the primary pet

and click the sharing check box.
OR
If you want to update or change information for a shared cage reservation, from the list of pets in the Patient box, click on the **primary pet** (a "P" in the *Shr* column in the Patient box designates the primary pet).

To view cage type availability, press **F2**. *See "Viewing Cage Availability" on page 44.*

- In the **Sharing** list box, click each pet that will share the same cage with the primary pet.

11 In the **Cage type** field, select the type of cage from the pull-down list (press **F2** to view cage type availability). The selected cage type must match the booking style (hotel or daycare) defined for the reservation type.

12 In the **Assign #** field, select one of the following options:

If the Assign button is active, the system does not let you check in a client without first assigning a cage number.

- Press **F2** to view the Reservation Book to determine which individual cages of the selected cage type are available. Click the available cage that you want to assign and click the **Select** button.

- If the Assign button is active, click the **Assign** button and the system automatically assigns the first available cage for the selected cage type.

Note   To use the Assign button, from the Activities menu, select Boarding, then Preferences. Click the Assign Cage Number check box. A ✓ appears in the box, indicating the Assign Button is activated.

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13 In the **Item ID** field, select one of the following options:

- Enter the **Item ID of the invoice item** you want to add (or press **F2** to select from the Invoice Item List).

- To change an invoice item to a different invoice item, select the ID of the item you want to change and enter a new Item ID (or press **F2** to select from the Invoice Item List).

- To change invoice item information, select the information to change (qty, amount, disc, tax or staff) and enter the changes.

- To delete an invoice item, select the item and press **Ctrl+D**.

Note   Boarding invoice items include the boarding fee (automatically added to the list when the cage type is selected). Additional boarding items can be added also. These items are transferred to the Patient Visit List when the reservation is checked out.

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14 To include boarding instructions, click the **Instructions** button. The Boarding Instructions window displays.

15 Enter reservation notes, equipment notes and other types of instructions (feeding, exercise, medication, other).

Note   Boarding instructions can be transferred from a previous reservation. See "To Transfer Boarding Instructions From a Previously Scheduled Reservation" on page 31.

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16 To make a grooming appointment for the pet, click the **Add** button. The Grooming Appointment window displays. If the pet has prior grooming appointments, the View History button is active. To transfer information from a prior grooming appointment, see "To Transfer Grooming Appointment History to a New Grooming Appointment" on page 42.

Grooming Information dialog box for practices without Appointment Scheduler

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Note   If you use Appointment Scheduler, grooming appointments are integrated with Appointment Scheduler software and a different Grooming Appointment screen displays. See "Make or Change Grooming Appointments with Appointment Scheduler" on page 35.

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17 At the **Grooming Information** dialog box:

- In the **Date** field, enter grooming date.

- In the **Staff** field, enter the groomer's staff ID.

- In the **Time units** field, enter the number of time units that you want to schedule for the grooming appointment. For example, if the length of a time unit is 10 minutes, you need four time units for a 40-minute appointment.

- In the **Notes** field, enter grooming notes.

- To exit the Grooming Information dialog box and return to the Reservation Information window, click **OK**.

18 When finished, click **OK** to save the reservation.
OR
Click **Check-in** to save reservation information and to check in the patient if the patient is ready to be checked in.

To Set Up Recurring Reservations and Grooming Appointments

An existing reservation can be set up to recur at specified intervals (Daily, Weekly, Monthly or Yearly). If a grooming appointment is included with the reservation, the recurring grooming appointments are placed in Appointment Scheduler for the selected recurring dates and times and can be viewed in the Schedule for Today.

1 On the toolbar, click .

2 At the **Client ID** field, type the ID of the client who wants to set up a recurring reservation (or press F2 to select from lookup list). A list of the client's reservations displays.

3 In the Reservation List, locate the reservation that the client wants to recur and right-click.

4 From a pop-up menu, select **Recurring Reservations** and then select the recurring time interval (Daily, Weekly, Monthly or Yearly).

5 In the **Arrival** and **Departure** fields, press **Tab** to accept the default times that are displayed; otherwise, enter the arrival and departure times for the recurring reservations.

6 The **Length of reservation (days)** field shows the length of days for the original reservation and cannot be changed.

Note To set up recurring reservations with a different length of days than on the original reservation, create a new reservation with the length of days that you want to include on recurring reservations. Then from the reservation list, select the new reservation and create the recurring reservations from it.

7 In the Patient list, all patients on the original reservation are displayed. To deselect any patient that you do not want to include on recurring reservations, highlight and click the patient's name.

8 Under Recurrence pattern, do one of the following:

- Select **Daily** and enter the number of days for which you want the reservation to recur *OR* select **Every weekday** to recur reservations every day for one or more weeks.

- Select **Weekly**. At the **Recur every** field, enter how often you want reservations to recur in terms of weeks, e.g., to recur a reservation once every two weeks, enter a 2. Click the appropriate check box to select the day of the week for the recurrence.

- Select **Monthly**. Enter the day of the month that you want the reservation to recur and the number of months that you want the reservation to recur *OR* select the week of the month (First, second, etc.), the day of the week (Sunday, Monday, etc.) and the number of months that you want the reservations to recur.

- Select **Yearly**. Select the month and the day that you want the reservation to recur *OR* select the week of the month, the day of the week and the month that you want the reservation to recur.

9 Under Range of recurrence, do one of the following:

- In the **Start** field, the first available date after the departure date of the original reservation is

automatically selected. If you do not want to use this date, enter or select a different start date. Future recurring reservations are set up based on this date. Select **End after** and enter the number of times that you want the reservation to recur.

- Select **End by** and select or enter a date when you want the reservation to stop recurring.

10 Click **OK**.

11 When complete, the following message displays: "Recurrence processing is complete. Do you want to print?" Select **Yes** to print a Reservation Recurrence Report for a client or select **No** to skip the report.

Note If one or more recurring reservations or grooming appointments cannot be created, a Reservation Recurrence Exception Report automatically prints, listing the date and reason the reservation or appointment could not be made. Some reasons include cages are full, the grooming appointment time is not available, or the reservation or appointment occurs when the practice is closed.

To Check In a Boarding Reservation

1 Locate the reservation in the Reservation List and click **Update**.

2 Complete the reservation information and make any necessary changes to the reservation information, boarding instructions, grooming appointment(s) and boarding items.

Note If the Assign cage numbers check box is checked in Preferences, the system **does not** let you check in a client without assigning a cage number.

---

3 Click **Check-in**. The reservation status is changed to checked in and the Reservation Information window closes. If set up to do so, the Check-In Report and/or other documents print automatically. See "To Set Up Preferences" on page 11. Checking in the reservation checks in all patients on the selected reservation.

> **Note** If you try to check in a boarding reservation on a different date than the scheduled check-in date, a warning message displays. To check in the reservation, change the arrival date and click **Check-in**.
>
> If you check in or check out a reservation within one day of its scheduled date, the system asks if you want to use the original scheduled date. Select **Yes** to use it or select **No** to change it to the current date.

To Check Out a Boarding Reservation

1 Locate the reservation in the Reservation List and click **Update**.

2 Review boarding instructions, grooming appointment items and boarding items for each patient.

3 Make any necessary changes and click **Check-out**. Invoice items for all patients boarded during this stay are written to the Patient Visit List.

4 Start an invoice for the client and select the patient. When the Patient Visit List displays, click the **Transfer** button to transfer boarding and grooming charges for the patient from the Patient Visit List to the invoice.

To Delete Boarding Reservation Information

Boarding reservations, grooming appointments associated with reservations, or any other boarding reservation information are easily deleted. A reservation can be marked with a status of "No Show" or "Cancelled" and the reservation can be deleted.

1 OPTIONAL. From the **Reservation List** window in the **Select cage/date** section, enter the date of the reservation to delete (or press **F2** to use the calendar tool).

2 OPTIONAL. In the **Select cage/date** section, select the cage type for which you want to view reservation information.

3 OPTIONAL. In the **Select status** section, make sure the status (scheduled, checked-in, checked-out, no show, cancelled) of the reservation that you want to delete is

selected (a check mark should display in the check box to
the left of the status).

4 Select the reservation to delete from the list of
reservations and click the **Delete** button. The Delete
Reservation dialog box opens.

No-show reservations,
cancelled reservations,
failed appointments,
and cancelled
appointments trigger a
client alert depending
on your Cornerstone
Foundation defaults.

Delete Reservation dialog box

5 Depending on the status of the reservation, do the
following:

- If the reservation is a *scheduled* reservation, in the
  Reservation section, select one of the following as
  the reason for deleting the reservation:

  ▶ **No Show** to give the deleted reservation a status
    of "No Show."

  ▶ **Cancelled** to give the deleted reservation a status
    of "Cancelled."

  ▶ **Delete the reservation**.

Note Deleted reservations with a status of "No Show" or
"Cancelled" can be viewed or printed and trigger an alert if set up
to do so. If you choose **Delete the reservation**, the reservation
record is removed from your files and can no longer be viewed or
printed.

- If the reservation is a *checked in* reservation—one
  checked in by mistake—in the Reservation section,

make sure the **Change reservation to 'Scheduled'** option is selected.

6 If you use Appointment Scheduler and a grooming appointment is associated with the reservation, in the **Grooming Appointment(s)** section, select whether the grooming appointment should be considered failed, cancelled or neither.

Note If you do not want to delete grooming appointment items from the Patient Visit List, deselect the check box labeled **Delete appointment items from patient visit**.

---

7 Click **OK**. The Delete Reservation dialog box closes. The reservation is deleted and the grooming appointment is removed from the grooming appointment schedule.

To Delete Boarding Invoice Items

1 OPTIONAL. On the Reservation List, in the **Select cage/date** section, enter the date of the reservation for which you want to delete boarding invoice items (or press **F2** to use the calendar tool).

2 OPTIONAL. In the **Select cage/date** section, select the cage type for which you want to view reservation information.

3 OPTIONAL. In the **Select status** section, select the status (scheduled, checked-in, checked-out, no show, cancelled) of the reservation from which you want to delete boarding invoice items (a check mark should display in the check box to the left of the status).

4 Select the reservation containing the boarding invoice items you want to delete.

5 Click **Update**. The Reservation Information window opens, displaying the invoice items on the reservation.

6 If this reservation includes more than one patient for the client, select the patient from the list.

7 To delete an invoice item, select the **Item ID** and press **Ctrl+D**. The selected item is deleted.

8   To return to the Reservation List, click **OK**.

View Reservation History

Previously scheduled boarding reservation information for a client can be viewed or edited. To view or edit a client's prior reservations:

1   On the toolbar, click 🏠. The Reservation List window displays.

2   Click **New**. The Reservation Information window displays.

3   In the **Client ID** field, enter the client's ID (or press **F2** to select from the Client List) and press **Tab**.

4   In the **Reservation #** field, press **F2**. A list of the client's previous reservations displays.

5   Using the up and down arrow keys, go to the reservation you want to view or edit and click **Select**. Prior reservation information for the selected reservation displays in the Reservation Information window.

6   When finished viewing or editing information, click **OK**.

To view or edit another prior reservation for the client, place the cursor in the Reservation # field and repeat steps 2 - 6 above.

To Add or Change Boarding Instructions

Boarding instructions allow you to make notes about the reservation, list equipment that accompany the pet, and add invoice items related to the daily care of the pet. Boarding instructions from a prior boarding stay can be transferred to a new reservation and can be added when the reservation is made or at check-in time. Boarding instructions print on the boarding reports.

1   In the Boarding Information section of the Reservation Information window, click **Instructions**. The Boarding Instructions window displays.

Boarding Instructions window

Note To view or transfer boarding instructions from a prior stay, click the **View History** button. This button is only active if the patient has boarding instructions from previously scheduled reservations on file.

To enter a line without using word wrap in the **Reservations notes** *and* **Equipment** *fields, press* **Ctrl**+**Enter**.

2 To add or change boarding instructions, in the **Reservation notes** field, enter or change any notes regarding this reservation.

3 In the **Equipment** field, enter or change any equipment for this pet (toys, leash, etc.).

4 In the **Type** field of the first empty row of the items list, select the item type (feeding, exercise, medication, other) from the pull-down list.

5 In the **Item ID** field, enter the **Invoice Item ID** (or press **F2** to select from the Invoice Item List). The description, quantity, amount, discount and tax for the selected invoice item displays.

6 In the **Frequency** field, select the frequency to provide the item to the patient during this boarding stay (once, daily, daily AM, daily PM, twice a day, three times a day or every other day).

7 In the **Beginning On** field, the arrival date for this reservation is automatically displayed. Change the date if necessary. For example, if the item is to be provided once

on a particular date during the boarding stay, in the
Beginning On field, enter the date the item is to be
provided.

8   In the **Staff** field, enter the staff ID of the staff member
    providing the service (or press **F2** to select from the Staff
    List).

9   In the free-form text field row below the item information,
    enter or edit any notes or special instructions that pertain
    to this item. These notes print on the Boarding Feeding
    List, Exercise List, Medications List, Combination List
    and Other Services List, depending on the type of invoice
    item (Feeding, Exercise, Medication, Other) the notes are
    associated with.

To Transfer Boarding Instructions From a Previously Scheduled Reservation

If there are boarding instructions from a previously scheduled
reservation, the View History button in the Boarding Instructions
window is active.

1   To view boarding instruction history for this pet, click the
    View History button. The Boarding Instructions History
    window displays.

2   In the **Reservation dates** field, select the boarding
    reservation date for which you want to view or transfer
    history.
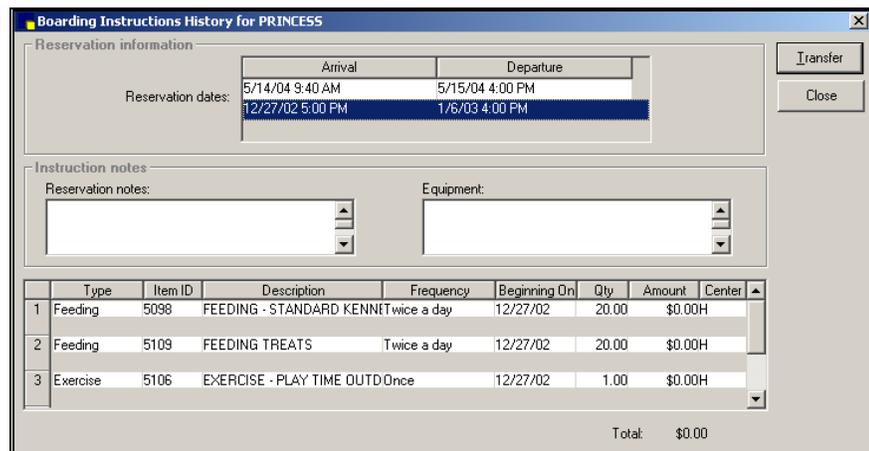
Boarding Instructions History window

| | **3** | To transfer boarding instructions from history to the current reservation, click **Transfer**. The instructions (including reservation notes and equipment) from the selected reservation are transferred to the Boarding Instructions window for the pet's current reservation. |

Transfer

4 If necessary, make changes to the transferred history.

> **Note** All boarding instruction history information from the selected reservation is transferred except the **Beginning On** date for feeding, exercise, medication and other items. The **Beginning On** date is changed to the arrival date for the current reservation.

To Delete Boarding Instructions

1 OPTIONAL. On the Reservation List window in the **Select cage/date** section, enter the date of the reservation from which you want to delete boarding instructions (or press **F2** to use the calendar tool).

2 OPTIONAL. In the **Select cage/date** section, select the cage type for which you want to view reservation information.

3 OPTIONAL. In the **Select status** section, select the status (scheduled, checked-in, checked-out, no show, cancelled) of the reservation from which you want to delete boarding instructions (a check mark should display in the check box to the left of the status).

4 Select the reservation with the boarding instructions you want to delete from the list of reservations and click **Update**. The selected reservation displays.

5 If this reservation includes more than one pet for the client, select the desired pet from the patient list and click **Instructions**. The Boarding Instructions window opens.

6 To delete reservation notes or equipment information, select the text to delete and press the **Delete** or the **Backspace** key. The highlighted text is deleted.

7 To delete an invoice item from Boarding Instructions, select the item and press **Ctrl+D**.

8 To save the changes and return to the Reservation Information window, click **OK**.

View Boarding Reservation Book

The Reservation Book allows you to view which cages of a selected cage type are occupied, scheduled for occupancy, blocked, or are available for occupancy for selected dates.

If you access the Reservation Book by pressing **F2** at the **Assign #** field on the Reservation Information window, you can also schedule a cage for occupancy or assign a cage when a pet is checked in. This option is not available when you access the Reservation Book from the Activities menu.

Note To activate the Reservation Book, the **Assign cage number** check box in Preferences *must be* checked. See "To Set Up Preferences" on page 11.

To View Reservation Book

1 To display the Reservation Book, select one of the following options:

- From the Cornerstone Foundation **Activities** menu, select **Boarding**, then select **Reservation Book**

- On the Reservation Information window, click in the **Assign #** field and press **F2**.

Reservation Book

*In the **Date** field, press **F2** to use the calendar tool to select date.*

2 In the **Cage type** field, select the type of cage you want to view from the pull-down list (press **F2** to view cage availability). All cages of the selected cage type are displayed in the Reservation Book.

3 Enter the **date** for which you want to view reservation information. Click the single arrows to move the calendar forward or backward by one day or click the double arrows to move the calendar forward or backward by one week. Information for the date you enter and for the next 19 days is displayed. Use the horizontal scroll bar to view all of the days. The default is today's date.

4 Scheduled reservations, checked in reservations, and blocked cages display in different colors in the Reservation Book. To change these colors, in the Legend section, click the applicable box (Scheduled, Checked in or Blocked). A color palette displays. Select the new color from the palette and click **OK**.

Note Scheduled reservations that do not have assigned cage numbers, do not appear on the Reservation Book.

5 If you are scheduling or checking in a reservation and you want to assign a cage, click the **cage number** you want to assign and click the **Select** button. The system returns to the Reservation Information window and assigns the selected cage number to the reservation for the date you selected in the Reservation Book. (This is the first date listed in the Reservation Book.)

Note Cage numbers can only be assigned if the Reservation Book is accessed by pressing **F2** at the **Assign #** field and the **Assign cage numbers** check box is checked in Preferences. See

6 To exit the Reservation Book without selecting a cage, click **Close**. If you have made any changes to the Reservation Book (for example, changed colors using the color palette), a prompt asks if you want to save changes. To save changes, click **Yes**.

Grooming Appointments

Grooming appointments can be scheduled through the Cornerstone Boarding and Grooming module or through the Cornerstone Appointment Scheduler module.

If you have Appointment Scheduler, you have additional options when scheduling grooming appointments. For example, you can search the appointment database for available grooming appointment dates and times.

Make or Change Grooming Appointments with Appointment Scheduler

The following instructions only apply to practices using Appointment Scheduler. For instructions on making grooming appointments without Appointment Scheduler, see Step 16 – 17 in "To Make or Change a Boarding Reservation" on page 18.

The only items you can change on a scheduled grooming appointment are Prefix, Appointment Items, Staff Time Allocation, and Notes.

You cannot change the appointment time or date from within Boarding and Grooming. To change the grooming appointment Date, Time, Room, Time units, Reason for visit or Staff, use your Cornerstone Appointment Scheduler software.

1 From the Reservation Information window in the **Grooming Information** section, select one of the following options:

- Click **Add** to make a grooming appointment.

- Click **Update** to change grooming information.

Grooming Appointment window for practices using Appointment Scheduler

> **Tip**   If the patient has prior grooming appointments, the **View History** button is active. To transfer information from a prior grooming appointment to the current grooming appointment, see "To Transfer Grooming Appointment History to a New Grooming Appointment" on page 42.

2   If you are changing information for an existing appointment, change information in the **Prefix**, **Appointment Items**, **Staff Time** and/or **Notes** fields.

> **Note**   To change other grooming appointment information, such as date/time, staff, room, reason for visit and time units, use your Cornerstone Appointment Scheduler software.

3   If you are making a new grooming appointment, in the **Units** field, if necessary, change the number of time units to schedule.

4   In the **Reason for visit** field, select the reason for visit from the pull-down list.

5   In the **Staff** field, enter the staff ID of the provider responsible for the grooming and press **Tab** or press **F2** to display a list of staff members. Click the staff member that is responsible for the grooming and click **Select**.

6 At the Grooming Appointment window, if desired, in the **Prefix** field, enter a one or two character prefix to designate the type of grooming appointment. The prefix appears in front of the client's name in the Appointment Scheduler daily schedule grid.

7 In the **Amount** field, enter or revise a standard or usual amount for this type of appointment. (If a default amount is set up in Appointment Scheduler for the reason for visit, it displays.)

8 To search for available grooming appointment times, select one of the following options (Find or Grid):

- Click the **Find** button. The Appointment Search window (below) displays. If necessary, change the room, reason for visit, and units.

Appointment Search window (Find button)

▶ In the **Staff** field, do one of the following:

▶ Press **Tab** to accept selected staff member.

▶ From the pull-down list, select **Any Staff**. In Preferences, if the Default Staff Classification field is set to **<none>** and you choose Any

Staff, the system searches for open appointments for all members of your staff. *Otherwise* If you choose Any Staff, the system only searches for open appointments for the staff members in the default staff classification set up in Preferences. See "To Set Up Preferences" on page 11.

▶ In the **Dates From** and **To** fields, enter the date range in which to search for an open appointment time (or press **F2** to use the calendar tool).

▶ Click **Search**. The system searches for available grooming appointments based on the criteria you have set and displays the results in a list at the bottom of the dialog box.

Note You can halt the search by clicking the **Stop** button. If necessary after stopping the search, select different criteria and restart the search.

▶ Select an appointment date/time and click **Schedule**. The Appointment Search window closes and the system returns to the Grooming Appointment window.

• Click **Grid**, the Grooming Appointment Grid window (below) displays, showing available time slots by room.

Note Only rooms set up as grooming rooms in Boarding Preferences display on the grid.
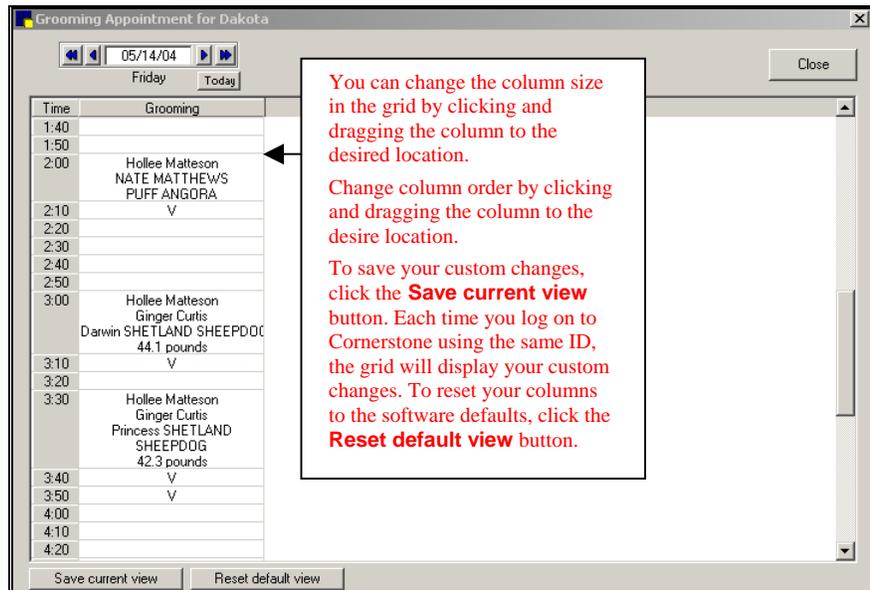
Grooming Appointment Grid window (Grid button)

> ▶ In the **Date** field, select the date that you want to search for an open appointment time (or press **F2** to use the calendar tool).
>
> ▶ On the daily grid (above), double-click in the desired appointment time slot to schedule an appointment. The system returns to the Grooming Appointment window.

9 On the Grooming Appointment window in the **Staff time** section, click a check box for each time unit that the staff member is scheduled to provide for this service during the appointment.

➲ **Example** If the total number of time units for the appointment is four and the scheduled staff member is needed for the first two time units, click the first two check boxes. If the staff member is only needed for the last two time units, click the last two check boxes.

---

10 In the **Notes** field, enter any notes pertaining to the grooming appointment.

11 In the Appointment Items section, enter the invoice **Item ID** of the item you want to add (or press **F2** to select from the Invoice Item List) and press **Tab**. The invoice item's information displays. If necessary, change the **Quantity** and **Amount** fields.

12 To save the appointment, click **OK**.

To Check In a Grooming Appointment with Appointment Scheduler

With Appointment Scheduler, the Cornerstone Foundation Census List allows you to check in and check out grooming appointments.

Patients can be checked-in for grooming appointments through the Cornerstone Foundation Census List.

1 Press **F3**. The Census List displays.

2 If necessary, in the **View** field, select **Scheduled Appointments** from the pull-down list. A list of scheduled appointments displays.

3 From the list, select the grooming appointment you want to check in and click the **Check-in** button. The Patient Check-in/out dialog box displays.

4 If necessary, enter additional comments, change grooming appointment information, such as reason for visit, room, staff and check-in date/time.

5 When finished, click the **Check-in** button again.

To Check Out a Grooming Appointment with Appointment Scheduler

Patients can be checked out from a grooming appointment through the Cornerstone Foundation Census List or the Appointment Scheduler.

1 Press **F3**. The Census List displays.

2 If necessary, in the **View** field, select **Patients in Hospital**. A list of hospitalized patients displays.

3 From the list, select the grooming appointment you want to check out and click the **Check-out** button.

Note   The patient will be automatically checked out if the Check-Out Patients box is checked when posting the invoice.

To Delete a Grooming Appointment

When you delete a grooming appointment, only the grooming appointment information is deleted from the boarding reservation.

1   OPTIONAL. In the Reservation List window in the **Select cage/date** section, enter the date of the reservation from which you want to delete grooming appointments (or press **F2** to use the calendar tool).

2   OPTIONAL. In the **Select cage/date** section, select the cage type for which you want to view reservation information.

3   OPTIONAL. In the **Select status** section, select the status (Scheduled, Checked-in, Checked-out, No Show, Cancelled) of the reservation from which you want to delete a grooming appointment (a check mark should display in the check box to the left of the status).

4   Select the reservation containing grooming appointments you want to delete from the list and click **Update**. The Reservation Information window opens.

5   If this reservation includes more than one patient for the client, select the patient from the patient list.

6   In the Grooming information section, click **Delete**. The Delete Appointment dialog box (see below) opens and displays the grooming appointment information.

Note   If you do not use Appointment Scheduler, the system asks "Are you sure you want to delete the grooming information." Click **Yes** to delete. (Only the grooming appointment is deleted. The boarding reservation is not deleted.)

Delete

Failed and cancelled appointments will trigger a client alert if "Failed Appointments" or "Cancelled Appointments" are selected in Cornerstone Foundation defaults.
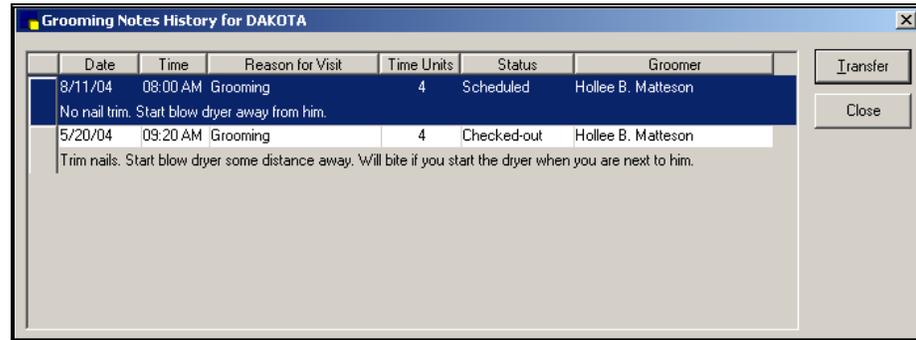
Delete Appointment

Appointment Information

Client name: 4040   Violet Benton
Patient name: 1109   Nelden
Staff: Hollee Matteson
Date/Time: 5/17/04 8:20 am

OK
Cancel

This appointment should be considered as:
  ○ Failed
  ● Cancelled
  ○ Neither

☑ Delete appointment items from patient visit

Delete Appointment dialog box

7   In the **This appointment should be considered** section, select one of the following options:

- **Failed** if the patient did not show up.

- **Cancelled** if the patient called in with enough advance notice.

- **Neither** if you do not want the deleted appointment to show up in the client's alerts.

8   If you do not want to delete the appointment items from the Patient Visit List, uncheck the **Delete appointment items from patient visit** check box.

9   Click **OK**. The Delete Appointment dialog box closes.

10 In the Reservation Information window, click **OK**. The grooming appointment is deleted. (The boarding reservation is not deleted).

To Transfer Grooming Appointment History to a New Grooming Appointment

1   In the Reservation Information window, in the Grooming Information section, click the **Add** button. The Grooming Appointment window displays. If there are prior grooming appointments for the patient, the View History button is active.

2 To view prior grooming appointment history or transfer information from a prior appointment to an appointment being scheduled, click the **View History** button. The Grooming Notes History dialog box opens.

	Date	Time	Reason for Visit	Time Units	Status	Groomer	
	8/11/04	08:00 AM	Grooming	4	Scheduled	Hollee B. Matteson	
	No nail trim. Start blow dryer away from him.						
	5/20/04	09:20 AM	Grooming	4	Checked-out	Hollee B. Matteson	
	Trim nails. Start blow dryer some distance away. Will bite if you start the dryer when you are next to him.						

Grooming Notes History dialog box

3 To transfer grooming information to the appointment being scheduled, select the previous appointment from the list and click **Transfer**. The Grooming Notes History dialog box closes and the time units, reason for visit, groomer, and notes are transferred to the appointment being scheduled.

4 If necessary, make changes to the transferred history.

Viewing Cage Availability

On the Cage Availability window, view available and booked cages of all types. Select a cage type and view booked and open cages of the selected type in a stacked column graph for eight days. (More days can be displayed if you enlarge the window or use a finer screen resolution.)

To View Cage Availability

1 To view cage availability, select of the following options:

- In the Reservation Information window, in the **Cage Type** field, press **F2**.

- From the Cornerstone Foundation **Activities** menu, select **Boarding** then select **View Cage Availability**.

- In the Reservation List window, in the **Cage/Date** field, press **F2**.

The Cage Availability window displays.
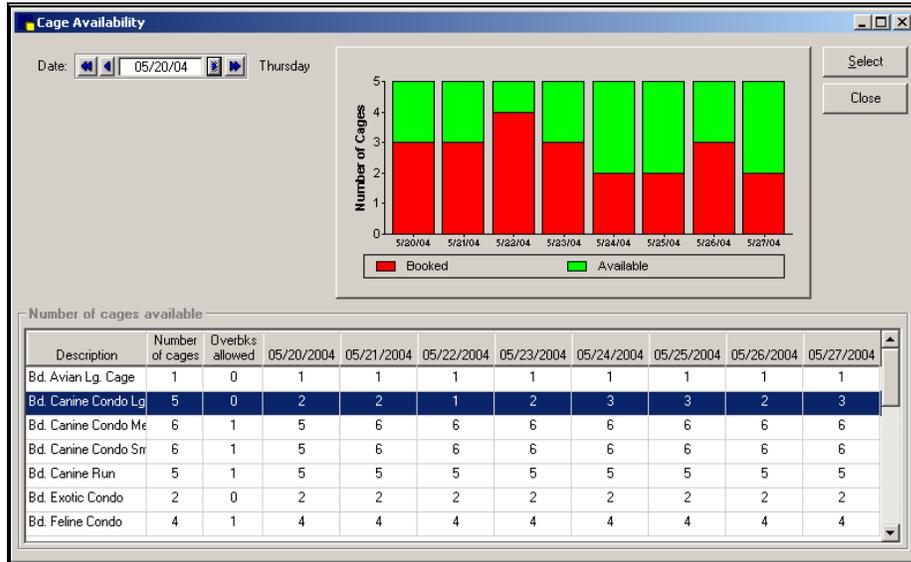
Cage Availability window

2 In the **Date** field, select the beginning date to view (or press **F2** to use the calendar tool).

3 Click the description of the cage type to display on the graph. On the graph, booked cages display in red; available cages display in green.

Note On the Reservation Information window, if you access the Cage Availability window by pressing **F2** in the **Cage Type** field, you can select the cage type for the reservation on the Cage Availability window by clicking the cage type you want to use then clicking the **Select** button.

Blocking Reservations for Cages

You can block reservations from being made for a cage while it is being cleaned or repaired. The blocked cage reduces the number of available cages during the time period that the cage is blocked.

To Block Cages

1 From the Cornerstone Foundation **Activities** menu, select **Boarding** and select **Block Cages**. The Blocked Cages List dialog box displays.
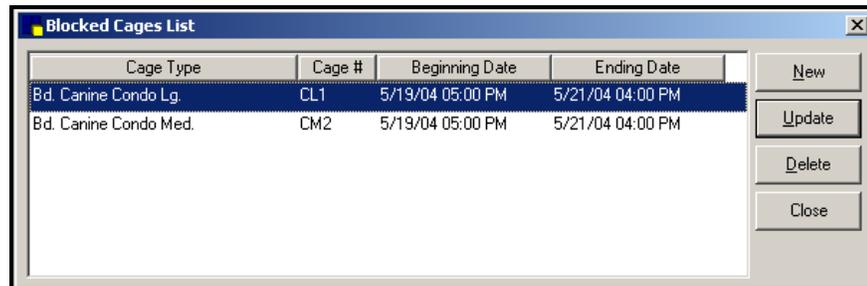
Block Cages List dialog box

2 Select one of the following options:

- Click **New** to add a cage to the Blocked Cages List. The Blocked Cage dialog box (see below) displays.

- Click the cage type for which you want to change information and click **Update** to change the dates a cage type is unavailable or to update notes concerning the cage type. The Blocked Cage dialog box displays.

- Click the cage type you want to remove and click **Delete** to remove a cage from the Blocked Cages List.
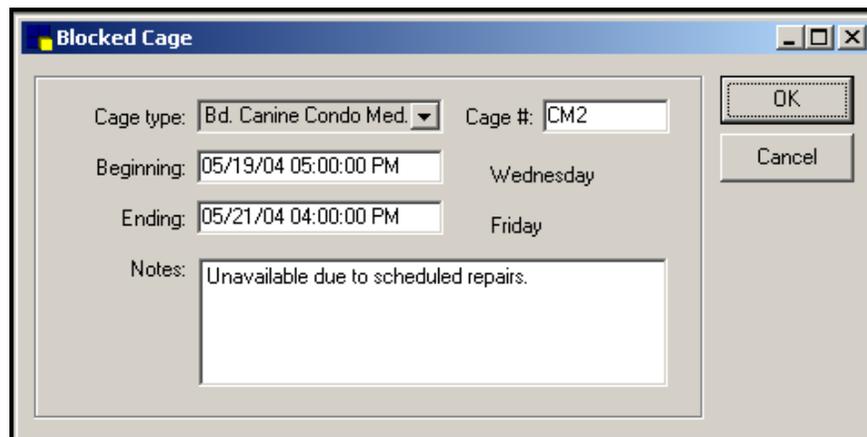
Block Cage dialog box

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3 From the pull-down menu, select the **Cage type**.

4 If the **Assign cage numbers** check box is checked in Preferences, the Cage # field is active. See "To Set Up Preferences" on page 11. If the field is active, in the **Cage #** field, press **F2** to display the Reservation Book. In the Reservation Book, highlight the cage that you want to block and click **Select**.

5 In the **Beginning** field, enter the date (or press **F2** to use the calendar tool) and time to begin blocking reservations for this cage.

The ending date must be a date later than the beginning date.

6 In the **Ending** field, enter the date (or press **F2** to use the calendar tool) and time to stop blocking reservations for the cage type, making the cage type available for reservations again.

7 In the **Notes** field, enter any notes regarding why the cage is blocked.

8 Click **OK**.

Print Boarding Documents

Four boarding documents are included with the boarding and grooming software. The documents are a boarding release form, a cage card, a cage label and a boarding activity sheet. These documents can be modified using the Cornerstone Document Editor (in Cornerstone Foundation). New boarding documents can also be created using the editor.

Note   To set up your boarding documents by modifying the preloaded documents or creating new ones, see "To Create a New Document Using the Document Editor" in the *Cornerstone Reference Manual* for details.

1 From the Cornerstone Foundation **Activities** menu, select **Boarding** then select **Print Boarding Documents**.

Print Boarding Documents window

2 In the **Doc ID** field, enter the identification number of the document you want to print (or press **F2** to select from the Document List).

3 If applicable, select the reservation status for which to print the document.

4 Select the dates for which you want to print documents by clicking to place a check mark in the **Arrival between** and **Departure between** check boxes.

5 Enter the dates for either or both as needed.

6 Select the **Cage type** and **Reservation type** from the pull-down lists. Patients whose reservations match your criteria display on the list.

7 To print the document for one or several patients, select the patient or patients from the list and click **OK**.
OR
To print the document for all patients on the list, click **OK** without selecting any patients.

8 When finished, click **Close**.

Print Boarding Reports

All boarding and grooming reports are accessed through the Cornerstone Foundation Reports menu by selecting **Boarding**.

The following reports are available:

- Boarding Feeding List.

- Boarding Exercise List.

- Boarding Medication List.

- Boarding Combination List.

- Boarding Census.

- Boarding Expected Check-Ins.

- Boarding Expected Check-Outs.

- Boarding No Shows.

- Boarding Cancelled List.

- Boarding Other Services List.

- Boarding Occupancy Forecast Report.

To Print Boarding Reports

1 From the Cornerstone **Reports** menu, select **Boarding**. The Boarding Reports window displays.
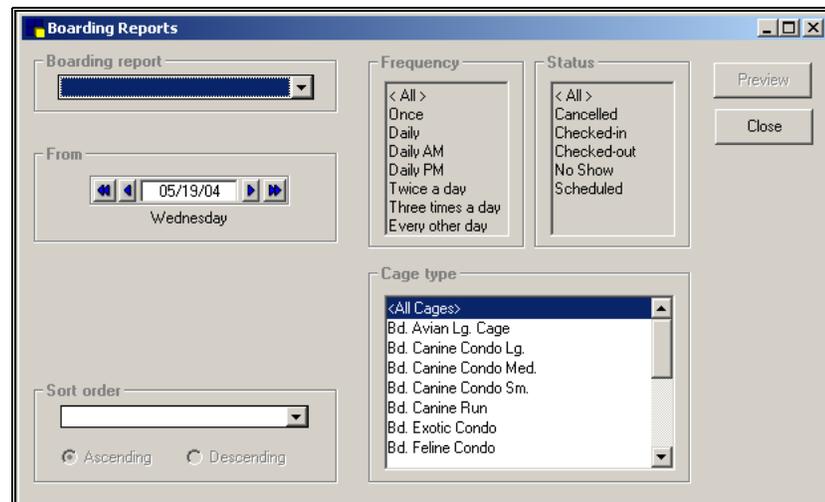
Boarding Reports window

2 In the **Boarding report** field, from the pull-down list, select the report you want to print.

3 In the **From** field, enter or use the arrow keys to select the date for which you want to print this report (or press **F2** to use the Calendar Tool).
OR
If this report can be printed for a date range, in the **From** field, select the beginning date for the report and in the **To** field, select the ending date for the report.

4 If applicable, in the **Frequency** field, select the frequency classifications to print on the report. (You can select more than one frequency.)

5 If applicable, in the **Status** field, select the status classifications (cancelled, checked-in, checked-out, no show, scheduled) to print on the report. (You can select more than one status.)

6 In the **Sort order** field, from the pull-down list, select the sort order for the report and select either an ascending or descending order.

7 If applicable, in the **Cage type** field, select the cage types to include on the report.

8 Click **Preview** to preview the report before printing it. The Report dialog box opens and displays the report.

9 Click **Print** to print the report. The Cornerstone Print Options dialog box opens. Select print options and click **OK**.

Boarding Reports

The Boarding Feeding List Report

The Boarding Feeding List Report provides a list of feeding requirements for checked-in patients on a specified date.

Note When you preview the report, if the departure date is past due and the pet has not been checked out, the departure date displays in red and an asterisk (*) appears at the end of the line.

The Boarding Exercise List Report

The Boarding Exercise List Report provides a list of exercise requirements for checked-in patients on a specified date.

Note   When you preview the report, if the departure date is past due and the pet has not been checked out, the departure date displays in red and an asterisk (*) appears at the end of the line.

The Boarding Medication List Report

The Boarding Medication List Report provides a list of medication requirements for checked-in patients on a specified date.

Note   When you preview the report, if the departure date is past due and the pet has not been checked out, the departure date displays in red and an asterisk (*) appears at the end of the line.

The Boarding Combination List Report

The Boarding Combination List Report provides a list of feeding, exercise, medication and other services for checked-in patients on a specified date.

Note   When you preview the report, if the departure date is past due and the pet has not been checked out, the departure date displays in red and an asterisk (*) appears at the end of the line.

The Boarding Census Report

The Boarding Census Report provides a list of patients by status (cancelled, checked-in, checked-out, no show, scheduled or all) for a selected date.

Note   When you preview the report, if the departure date is past due and the pet has not been checked out, the arrival date displays in red and an asterisk (*) appears at the end of the line.

The Boarding Expected Check-Ins Report

The Boarding Expected Check-Ins Report provides a list of reservations made for a specified date. Patients due to be checked in prior to the specified date also prints on the report. If the patient

has overdue reminders or no reminders entered into the system, a red R in a red box appears next to the patient's arrival date.

> **Note** When you preview the report, if the arrival date is past due and the pet has not been checked-in, the arrival date displays in red and an asterisk (*) appears at the end of the line.

The Boarding Expected Check-Outs Report

The Boarding Expected Check-Outs Report provides a list of patients expected to check out on a specified date. Patients due to be checked out prior to the specified date also print on the report.

> **Note** When you preview the report, if the departure date is past due and the pet has not been checked out, the departure date displays in red and an asterisk (*) appears at the end of the line.

The Boarding No Shows Report

The Boarding No Shows Report provides a list of boarding reservation no shows within a specified date range. For a reservation to appear on the Boarding No Shows Report, the reservation must be deleted and no show must be selected as the reason it was deleted.

The Boarding Cancelled List Report

The Boarding Cancelled List Report provides a list of reservations that have been cancelled within a date range. For a cancelled reservation to appear on the Boarding Cancelled List Report, the reservation must be deleted and cancelled must be selected as the reason it was deleted.

The Other Services List Report

The Other Services List Report provides a list of boarding items classified as Other Services for checked-in patients for a selected date.

> **Note** When you preview the report, if the departure date is past due and the pet has not been checked-out, the departure date displays in red and an asterisk (*) appears at the end of the line.

Boarding Occupancy Forecast Report

The Boarding Occupancy Forecast Report prints a list of the number of cages scheduled to be occupied for a selected range of dates. The report also includes the number of animals arriving and departing, as well as the total number of cages set up for each. Arrivals are included in the occupancy totals. The report is useful when planning for staff scheduling.

Glossary of Terms

Reservation number

Reservation numbers are uniquely assigned to each boarding reservation. The reservation number distinguishes between separate reservations made by the same client.

Sharing

More than one pet can be booked for reservations in a single boarding cage.

Time units

A time unit is the smallest unit of time for which an appointment can be scheduled. A time unit may be 10 or 15 minutes.

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