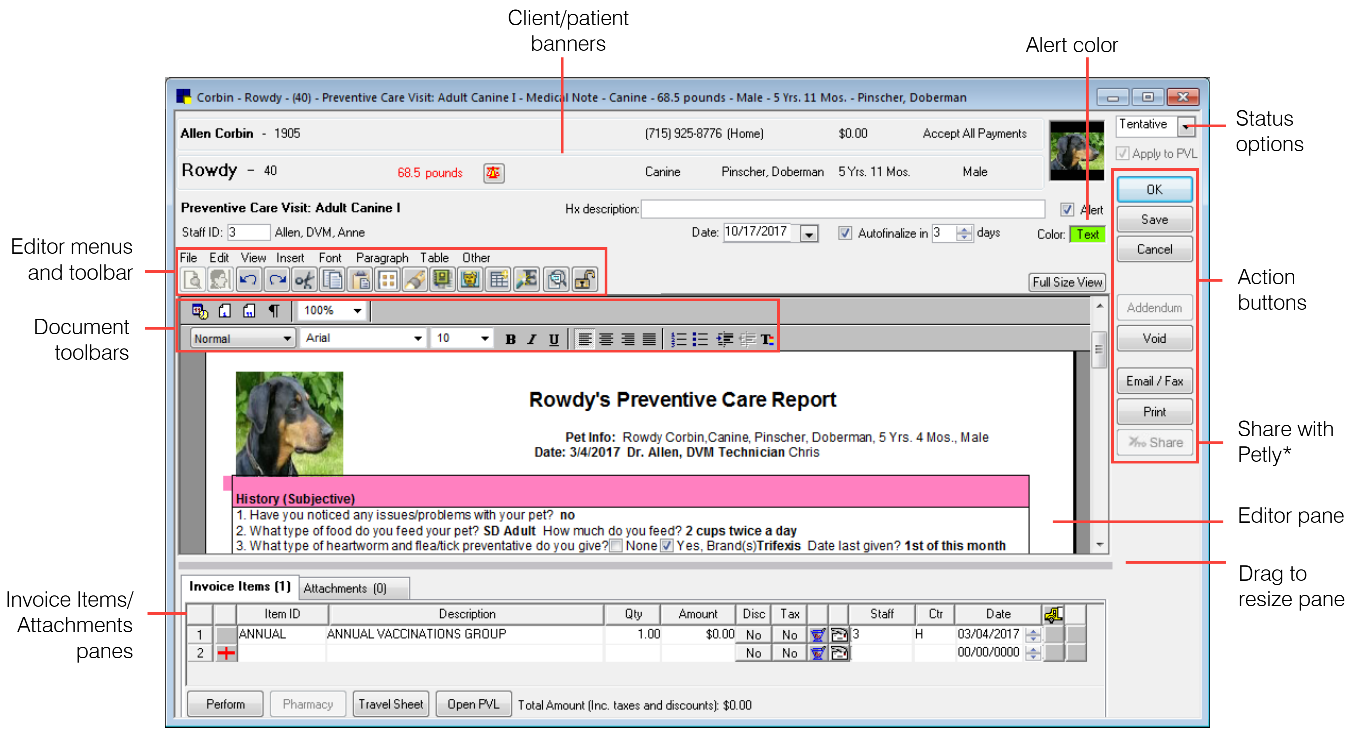
Medical Notes

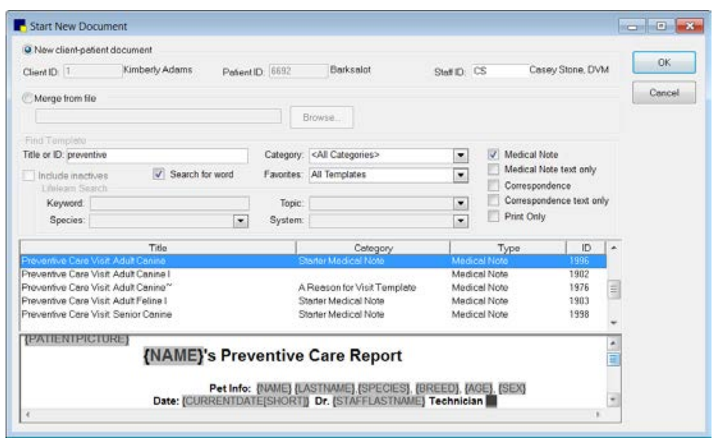
Create medical notes in the Cornerstone* Editor window using Cornerstone templates or those set up by your practice.



Open the Start New Document window

Before you can access the Cornerstone Editor window, you must start a new document and select a document template. You can access the Start New Document window in the following ways:

- **Patient Clipboard***—In the Patient information area, right-click the patient's name and select **Medical Note**. If you use this method, the patient's information will be completed.
- **Toolbar**—Click the **Medical Notes** button. Then, enter the client and patient IDs in the appropriate boxes or press F2 to search for them.



Use the options in the Find Template area to search for the template you need.

- The template list displays a list of templates that match your search criteria.
- The preview pane displays a preview of the selected template.
- Once you have selected your template, click **OK** to open the Cornerstone Editor window.

Editor actions

To…	Do this…
Update a patient's weight/vital signs.	Depending on your practice's settings, you may be prompted to update the patient's weight when the Cornerstone Editor window opens. At any time, you can click the **Vital Signs/Weight** button to open the window. Enter the patient's weight; click the **add more vital signs** link to add more information.
Set the status of a medical note.	Use the **Status** drop-down list to set the status of the medical note to **Draft** (work in progress), **Tentative** (basically complete but can be updated), or **Final** (no changes can be made). The **Apply to PVL** check box is selected by default and cannot be cleared when the medical note is tentative or final. This ensures that any invoice items on the medical note are applied to the Patient Visit List.
Update or modify the document.	The Editor pane is where you can fill in the template, add necessary text, pictures, and other patient data. Use the menu bar, Editor toolbar, or right-click menus to add elements to the template.
Add invoice items to a medical note.	On the Invoice tab, enter an invoice item ID or press F2 to search for an item. Complete the information for the item row, and then set the status by clicking the button at the beginning of the row. Recommended Accepted Performed Declined Declined to History
Attach a document or URL to a medical note.	On the **Attachments** tab, right-click and select one of the following: **New File**—Browse to the file's location, select the file, and click **Open**. **New URL**—Copy the URL from your browser, right-click in the **Attachments** area, and select **Paste URL**.
Lock/unlock a medical note.	Click the **Lock/Unlock document** button in the toolbar. When the document is locked, use the Tab key on your keyboard to quickly insert data in tab-ordered fields or to accept default data without entering text or data.
Email or fax a medical note.	Click the **Email/Fax** button. If you have not finalized the medical note you will be prompted to do so. On the Communications window, make changes to the email subject, recipients, and message as needed, and then click **Send**.
Share via Pet Health Network* Pro.	Click the **Share** button. If you have not finalized the medical note you will be prompted to do so. On the Pet Health Network Pro window, enter the staff ID and a message, and then click **OK**.

Keyboard shortcuts

F1	Display onscreen Help for the current window.
F2	Look up values for a list, such as with ID fields.
Tab	Move the cursor to the next field.
Shift+Tab	Move the cursor to the previous field.
Ctrl+D	Delete the selected record.
Ctrl+U	Update the selected record.
Ctrl+C/Ctrl+V	Copy and paste the selected item.
Ctrl+Enter	Move cursor to the next line in note areas.

Right-click menus

Use right-click menus for quick access to many editing tools. The options vary depending on the part of the document you are on.

Tips:

- Click the **Full Size View** button to expand the document working area.
- Double-click client/patient banners to view or update client/patient information from the document window.

For more information

For medical notes setup and detailed instructions, see the Medical Notes and Correspondence section of the Cornerstone Help .

Go to idexxlearningcenter.com to view snippet videos about many features in the Cornerstone Software.
Find this document at **idexx.com/cornerstoneresources**