

How to Create a List of Cornerstone* Overdue Reminders or Callbacks

1. For both callbacks and reminders, go to **Reports > Patient > Reminder Report**.
For callbacks only, go to **Reports > Patient > Reminder Recall Report**.
For reminders only, go to **Reports > Patient > Reminder Letter Report**.
2. Double-click the report you want in the list.
OR
Select the report you want and then click **Create Report**.
3. From the **Sort order** drop-down list, select one of the following:
 - **Client ID**—Sorts the report alphabetically by client ID.
 - **Client Last Name**—Sorts the report alphabetically by client last name.
 - **Inv. Item Desc.**—Sorts the report alphabetically by invoice item name.
 - **Invoice Item ID**—Sorts the report alphabetically by invoice item ID.
 - **Patient ID**—Groups all reminders by patient ID.
4. To print a list of all existing reminders for active clients and patients, click **Print** or **Preview**. (In the Range area, in the **Description** column, the Client Status and Patient Status options are set to active by default to show only active clients and patients.)
5. To refine your list, select **AND** or **OR** in the **And/Or** column to add more range filters.
Note: Select AND to show results that meet both criteria. Select OR to show results that meet either criteria. Ranges of the same type must be separated by OR. If using both **AND** and **OR** within the same report, AND must be selected first.
6. To refine your list, from the **Description** column drop-down list, select an additional filter:
 - **Client ID**—Lets you enter a range of client IDs.
 - **Client Status**—Lets you include only active or only inactive clients.
 - **Invoice Item ID**—Lets you enter a range of invoice item IDs.
 - **Patient ID**—Lets you enter a range of patient IDs.
 - **Patient Status**—Lets you include only active or only inactive patients.
 - **Reminder Date**—Lets you enter a date range.
 - **Staff ID**—Lets you enter a range of staff IDs or a specific staff ID.
7. Enter a range of values in the **Starting value** and **Ending value** fields. For all filters except Client Status and Patient Status, you can double-click or press **F2** to open a list and select your values. For Client Status or Patient Status, enter either **active** or **inactive** in both fields.
Note: Your starting and ending values will usually be the same unless the items you choose are sequential (such as invoice item IDs 100 to 200) and you want to print all items within that range.

8. After entering all the filters you need, click **Preview** to view the report before printing.

Description	Starting value	Ending value	And/Or
Patient Status	active	active	AND
Client Status	active	active	AND
Reminder Date	1/1/2016	12/31/2016	AND
Invoice Item ID	1171	1171	

This report prints a list of all active patients with active owners that had reminders due in the year 2016 for the invoice item 1171.

Find this guide

Look under “Resources by Topic” on the [Cornerstone Software Resources](#) page.