# Cornerstone Daily Planner

The Cornerstone* Daily Planner window displays open cases for patients currently being seen at the practice. The information is organized in nine tabs, which display information for the logged in user by default.

- You can change the staff ID as needed, or select **View for all staff**.
- You can sort each tab's information in ascending/descending order by clicking the column headers.
- Right-clicking any information row displays a related menu.
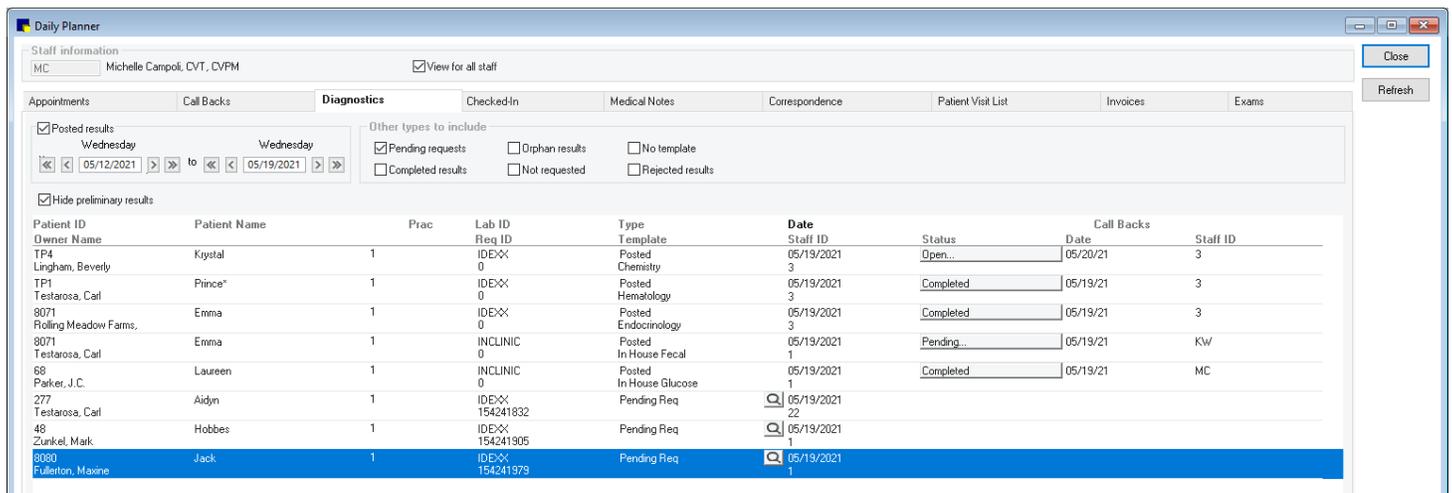


## Opening the Daily Planner window

- **Toolbar**—Click the **Daily Planner** button ⊕.
- **Menu**—On the **Activities** menu, select **Daily Planner**.

**Tip:** You can set the Daily Planner to open when you log in at **Controls > Defaults > Staff > Miscellaneous**. The Staff Default security setting is required.

## Daily Planner tabs

| Tab | Description |
|---|---|
| Appointments | View scheduled and no-show status patient appointments for a specific staff ID or view for all staff. Once an appointment is checked in, the patient information is displayed on the Checked-In tab. Use the right-click options to check the patient in, update the appointment, or open the Patient Clipboard*. |
| Call Backs | View scheduled reminder callbacks. Use the right-click options to update a callback, delete a callback, add a note to the callback, change the date of the callback, enter patient comments about the callback, or open the Patient Clipboard. By default, callbacks are listed for the past 7 days. This setting can be adjusted under **Controls > Defaults > Practice & Workstation > Daily Planner**. |
| Diagnostics | View and manage many of your laboratory-related tasks, including VetConnect* PLUS results and laboratory callbacks. Use the right-click options to update a lab request, update a callback, update a laboratory result, refresh the information, or open the Patient Clipboard. |
| Checked-In | View a list of patients currently checked into the practice, including status details. Use the right-click options to update check-in information, check out the patient, or open the Patient Clipboard. **Tip:** Hover the cursor over the **Appointment Notes** icon to view appointment notes for the patient and the **Alert Notes** ⚠ icon to view alert notes. |

| Tab | Description |
|---|---|
| Medical Notes | View tentative medical notes and classic medical notes to see which medical notes need to be reviewed and marked as final (finalized medical notes are not displayed). Use right-click options to update or finalize medical notes or open the Patient Clipboard. |
| Correspondence | Access tentative correspondence documents to see which correspondence documents need to be reviewed and marked as final (finalized correspondence documents are not displayed). Use right-click options to update the correspondence or open the Patient Clipboard. |
| Patient Visit List | View all patients with items on the Patient Visit List as well as their hospital status. Use the right-click options to update the Patient Visit List, print the Patient Visit List Report, or open the Patient Clipboard.  |
| Invoices | View a list of all open invoices. Use the right-click options to update an invoice or open the Patient Clipboard. |
| Exams | View a list of open physical examinations and Patient Advisor examinations. Use the right-click options to update an examination or open the Patient Clipboard. |
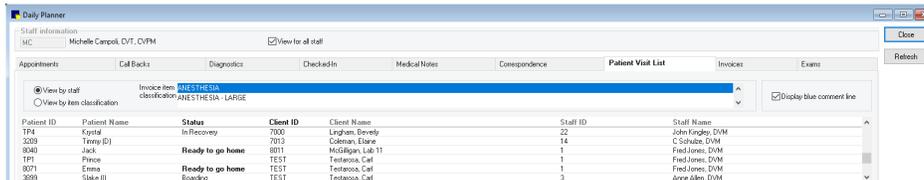
## Keyboard shortcuts

| | |
|---|---|
| F1 | Display on-screen Help for the current window. |
| F2 | Look up values for a list, such as 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 shortcut options on each tab.

**Tip:** Click **Refresh** or right-click and select **Refresh** to update the Daily Planner after making changes in another window.

## For more information

For Daily Planner setup and detailed help, see the "Daily Planner" section of the Cornerstone Help ？.

Go to idexxlearningcenter.com to view snippet videos about the Daily Planner.

Find this document at **idexx.com/cornerstonehelp**.