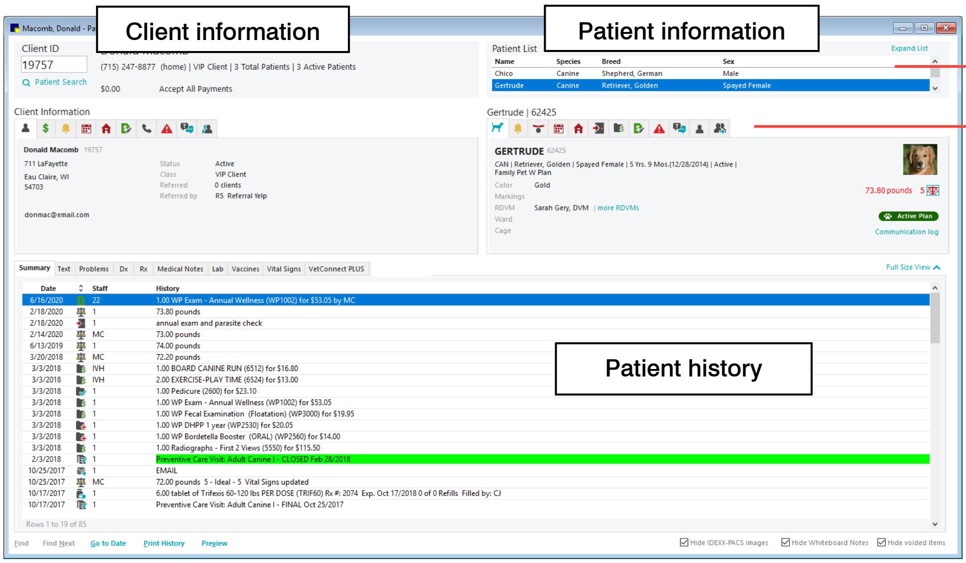
Patient Clipboard—clients and patients

The Patient Clipboard* shows everything in a patient's record. It is divided into three main areas: client information, patient information, and patient history. Information tabs provide details for client and patient alerts, appointments, estimates, important notes, reminders, and more.



Patient list

Hover cursor over icons to learn what each tab does.

Tip: To refresh or clear the data, right-click in the **Client** area and select **Refresh** or **Clear**.

Opening the Patient Clipboard

- Toolbar—Click the **Patient Clipboard** button.
- Client/patient search—Right-click a client or patient card.
- Daily Planner—Right-click a patient on any tab.
- Schedule for Today—Right-click an appointment.

Using the Patient Clipboard

1. In the **Client ID** box, type the ID, or to search for the client, press **F2** or double-click in the field. Select the **Include inactives** checkbox to search all clients.
   Alternately, click **Patient Search** to search for and select a patient. Select the **Include Inactives/deceased** checkbox to search for all patients.
2. Click the tabs under **Client information** area to view, add, or change information.
3. In the **Patient list** area, select the patient from the client's list of pets, and then click the tabs under **Patient information** or in the patient history area to view, add, or change information.
4. Use the **Full Size View** to expand the patient history area; use **Normal View** to return to standard view.
5. Right-click the **client information area** or a patient name in the Patient List area to access a menu of activity options.

Common actions

To…	Do this…
Add a new client	Open the Client List window (see step 1 above), and ensure there isn't an existing account. Click **New;** in the **Client ID** box, type the ID or press **Tab** to accept an automatically assigned ID.
Update client information	Right-click in the **Client** area and select **Update**.

To…	Do this…
Add a new patient to a client	Right-click in the Patient list area and select **New**. In the **Patient ID** box, type the ID or press **Tab** to accept an automatically assigned ID. On the Information tab, complete the **Information** and **Weight/Body Score** areas. Complete any relevant information on the remaining tabs. Tip: To learn how to add a pet picture, see "Using Patient Picture" in the Cornerstone* Help ?.
Update patient information	In the Patient list area, right-click the patient and select **Update**. Acknowledge or resolve any alerts and make the changes to the patient's information.
Add a patient's weight	In the Patient list area, right-click the patient and select **Vital Signs/Weight**. Update the **Weight Entry** area and make any other vital sign updates. You can also click the **Vital Signs** button on the **Patient Information** tab in the Patient Information area.
Add or edit patient reminders	In the Patient list area, right-click the patient and select **Reminders**. On the **Letters** and **Call Backs** tabs, add or edit reminders. You can also view, add, and edit reminders on the **Reminders** tab in the Patient information area.
View or edit a patient's Petly* Plan information	In the Patient information area, click the **Petly Plans** widget button Active Plan to view available items (active plan) or update/enroll a patient (inactive/not-enrolled plan statuses). Right-click the button to refresh the plan status. **Note:** All patients display a Not Enrolled status if your practice does not subscribe to Petly Plans.
View communications	In the Patient information area, click **Communication log** to view outbound email and fax communications.
Update patient status to inactive or deceased	In the Patient list area, right-click the patient and click **Update**. From the **Status** drop-down list, select **Inactive** or **Deceased**. For a deceased patient, verify the deceased date.
Transfer patient ownership	In the Patient list area, right-click the patient and select **Update**. In the **Owners** area, right-click the owner to be changed and select **Update**. In the **Status** area, select **Past** and then click **OK**. Right-click in the **Owners** area and select **New**. Enter the new owner's client ID. **Note:** Medical history follows the patient. Financial history (invoices) are retained by the original client.

Keyboard shortcuts

F1	Display on-screen Help for the current window.
F2	Look up values for a list, such as ID fields.
F7/F8	Move through recently accessed client/patient lists.
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 the cursor to the next line in note areas.

Right-click menus

Use right-click menus for quick access to many tools. Different right-click options are available in each section of the Patient Clipboard.

Tip: Double-click in an ID field to search for an item. Double-click any tab in the Patient information or Client information area to open the information window.

For more information

For detailed Patient Clipboard instructions, see "Patient Clipboard" in the Cornerstone Help ?.

Go to idexxlearningcenter.com to view snippet videos about the Patient Clipboard and many other Cornerstone features.

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