Patient Visit List

The Cornerstone* Patient Visit List (PVL) displays invoice items and other information that you may want to transfer later to an invoice or patient history. It also allows you to keep track of communications during a visit.

Inventory status

Charge source

Item status

Action buttons

Indicates items to transfer to this invoice

Petly* Plans Discount

Move selected item up/down

Discounts applied

Open the Patient Visit List window

Access the Patient Visit List window in the following ways:

- **Patient Clipboard***—Select the patient. In the Patient information area, click the **Patient Visit List** tab ![icon], and then right-click within the tab and select **Update**.
- **Client/patient search**—Right-click a patient card and select **Patient Visit List**.
- **Toolbar**—Click the **Patient Visit List (PVL)** button ![icon].

Note: The Patient Visit List opens automatically when you open or create an invoice, unless the **Display Patient Visit Message** checkbox has been selected under **Invoice Defaults**. You can also open the PVL from an invoice containing items by clicking **Special>Patient Visit >OK**.

Understanding the Patient Visit List

- **Charge source**—When an item has been transferred to the Patient Visit List, the first column displays an icon showing the charge source, such as an estimate or a laboratory request. If you add an item directly to the list, no icon is displayed.
- **Status icons**—Item status is displayed in the second column. The ![plus icon] icon indicates a recommended item or service and is displayed by default. To change the item status, right-click the icon and select the appropriate status, as follows:

  ![accepted icon] **Accepted**. The client has accepted the recommended item/service.

  ![performed icon] **Performed**. The item has been dispensed or the service performed. To mark all accepted items as performed, click the **Perform** button on the right.

  ![declined icon] **Declined**. The client has declined the item/service. The item will be deleted when the other items are transferred to the invoice; there will be no history entry.

  ![declined to history icon] **Declined to history**. The item is declined to history and will be deleted when the other items are transferred to the invoice. A history entry will indicate the item was recommended but declined. Declined history items cannot be hidden, voided, or edited, but they can be excluded from the Patient History Report.

- **Automatic status updates**—When estimates and appointments are transferred to the Patient Visit List, their status is automatically changed to Accepted. When boarding, imaging, Electronic Whiteboard, and laboratory items are transferred, their status is automatically changed to Performed.
- **Petly* Plans**—Subscribers to Petly Plans will see plan status. Available items will be discounted when you click the Petly Plans Discount button [Discount] .
- **Include checkboxes**—The three checkboxes in the lower left of the list indicate which items to transfer to the invoice. If **Include recommended** is selected, items marked ✚ transfer. If **Include accepted** is selected, items marked ✔ transfer. If **Include performed** is selected, items marked $ transfer.
- **Blue comment line**—The blue line that appears under each line item stores comments or notes about the item. The note is not transferred to the medical record unless it is declined to history. To hide the blue line, clear the **Display blue comment line** checkbox.

Add recommended items to the Patient Visit List

1. On the Patient Visit List window, if the patient information is not displayed, type the ID in the **Patient ID** box or press **F2** to search for the patient.
2. In the next available **Item ID** field, type the ID or press **F2** to search for the item.
3. Complete the remaining fields in the line as needed; if necessary, change the item status by clicking the status icon in the second column of the grid.
4. When finished adding items, click **OK**.

Other Patient Visit List actions

To…	Do this…
Add departing instructions	Click the **Departing** button to open the Departing Instructions window, where you can view and modify departing instructions linked to invoice items on this PVL. You can also add or update general instructions to associate with this PVL.
Process special actions	Click the **Special** button to view and process any special actions linked to the invoiced items on this PVL.
Apply Petly Plans discounts	Click the Petly Plans **Discount** button to apply a 100% discount to available plan items when working with a patient on an active plan.
View all PVLs on the Daily Planner window	Use the **Patient Visit List** tab on the Daily Planner window ✚ to view all PVLs associated with a specific staff member or for all staff.
Create an invoice	After reviewing charges, click **Invoice** to transfer the items to an invoice and continue posting.
Review a line's pricing detail	Right-click the item line to display the Calculated Price window.

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

Right-click a status icon to display and select from a list of all Patient Visit List statuses

Right-click an individual line to view a breakdown of the item's pricing.

Tip: Green text rows indicate a price was changed; red text rows indicate duplicate entries.

For more information

For detailed Patient Visit List instructions, see the Cornerstone Help ❓ .

Go to idexxlearningcenter.com to view snippet videos about many other Cornerstone features.

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

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