



Central and Remote Users Guide



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Introduction

Overview of Cornerstone[®] Central and Cornerstone[®] Remote

Cornerstone Central and Cornerstone Remote are separate programs used together to collect and update information from multiple practices.

Using Central and Remote software, practices that are linked can:

- Generate combined reports by gathering summary data from remote sites.
- Maintain common invoice item information.



Cornerstone[®] Central

The location with the Cornerstone Central program serves as the control center for your remote sites.

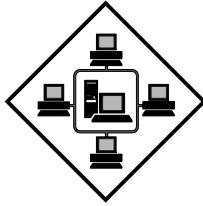
At Cornerstone Central:

- Automatically receive end-of-day information from your remote sites on the time schedule you choose.
- Organize remote information into reports of summary activity for each remote site or region. These reports are printed at the Central site.
- Add and change invoice classes and items at the Central site. To keep invoice item information standard among your sites, it is important that all modifications to invoice information be controlled by the Central site.
- Transmit invoice item additions and changes to remote sites.

Note If set up to do so, remote sites can accept or reject individual invoice item modifications.

- If set up to do so, print and send reminders for remote sites.

Note The reminder files must be generated at the remote sites and automatically transmitted to the Central site before the Central server can print the reminders.



Cornerstone® Remote

At remote sites, Cornerstone Foundation software is used to process most of the activity (end-of-day, invoicing, reminders, client and patient records, etc.).

At Cornerstone Remote sites:

- Automatically collect End-of-Period summary data and transmit the data to the Central server.
- Allow you to accept or reject invoice item modifications sent from the Central server if set up to do so. However, you can choose to set up your remote site so that all invoice item modifications are automatically accepted.
- Transmit reminder files to the Central server to be printed. (Optional. You can choose to print reminders at the remote site.) Whether you print the files from the Central server or at the remote sites, the reminder files must be generated in the Cornerstone Foundation software.

Initial Setup

Preparing to Use Central and Remote

To be able to transfer data between Cornerstone Remote and Cornerstone Central, you must first set up the information the Remote module requires to synchronize the Central and Remote databases.

Follow this checklist to ensure that you have completed all steps.

Initial setup on Remote:



- 1 Load Cornerstone Foundation and Remote Module software.
- 2 Set up security for Remote location.
- 3 Set preferences.
- 4 Set up reminder defaults.
- 5 Share the folder (usually cstone) that contains the Cornerstone database.
- 6 Set up a Site ID for the Remote site. Communicate this ID to Central. Central must have your remote Site ID when it sets up your remote site in the Central database.

Initial setup on the Central:



- 1 Load Cornerstone Foundation (optional) and Central Module.
- 2 Set up security for Central location.
- 3 Set up Central information (name, address, state, postal code, phone and fax numbers).
- 4 Set up defaults (unit of measure, dispensing fee, etc.).
- 5 Set up Central toolbar preferences.
- 6 Set up the staff members who can access Central software.
- 7 Set up site information (site regions and sites) for each remote site.
- 8 Fill the Central database with existing invoice items and species extracted from one of the remote sites or from the main site.
- 9 If necessary, set up additional invoice items (including invoice item classifications and units of measure).

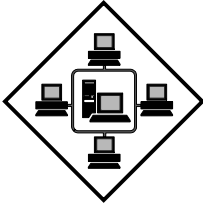
- 10 If necessary, set up additional species.
- 11 Set up data selections.
- 12 Set up transmission groups.
- 13 Synchronize master files.

Set up links at Remote locations after completing initial Central setup:



- 1 Set up species links.
- 2 Set up unit of measure links.
- 3 Set up invoice item links.
- 4 Set up sex ID links.

Initial Remote Setup



Set Up Security for Remote Location

Due to its confidential nature, specific security instructions are not provided in this book. To set up security for each staff member, choose **Security Setup** on the **File** menu, and follow the instructions included separately with Cornerstone Foundation.

Note If none of the staff at a remote has security access to the Update Invoice Item dialog box, invoice items updates from the Central server will occur as soon as Cornerstone Remote software is opened.

Set Up Remote Preferences

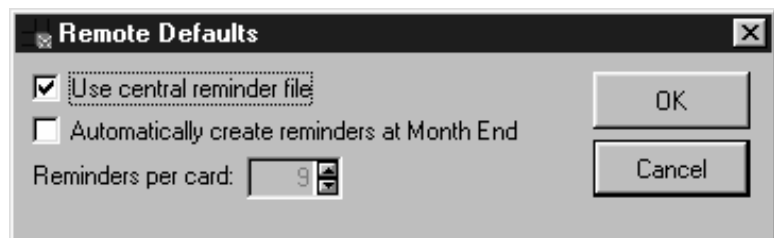
You can display the toolbar in different locations in the Cornerstone Remote window. For each remote location, you can also designate if you want to print reminders from the Central server or the remote site.

To Change the Toolbar

- 1 On the **File** menu, choose **Preferences** and then **Toolbar**. The Toolbar Setup dialog box appears.
- 2 Select **Show Toolbar** to display the toolbar.
- 3 Select **Show Text** to display helpful text on the toolbar button.
- 4 If **Show Toolbar** is selected, specify where you want the toolbar to appear in the window.
- 5 Click **Close**.

To Set the Reminder Defaults

- 1 On the **File** menu, choose **Preferences** and then **Defaults**. The Remote Defaults dialog box appears.



Remote Defaults dialog box

- 2 Click the **Use central reminder file** check box if you want to print your reminders from the Central server. Leave this box unchecked if you want to print your reminders at the remote location.
- 3 Click **OK** when finished.

Set Up a Shared Folder

In order for Cornerstone Central software to access necessary data from your remote computer, you must allow shared access to the folder that contains the Cornerstone database (cstone.db). By default this is the **cstone** folder on the server's hard drive.

Note You must be logged on the network as a user with administrator privileges.

- 1 In Windows Explorer, right-click the folder that contains the Cornerstone database. (By default this is the **cstone** folder.) A pop-up menu appears.
- 2 On the menu, click **Sharing**. The Cstone Properties dialog box appears.
- 3 Click the **Sharing tab** (if not already selected) and specify **Share this folder**.
- 4 In the **Share name** field, enter **cstone**.
- 5 In the **User Limit** field, select **Maximum allowed**.
- 6 Choose **OK**.

Set Up Your Site ID at Remote

As data is being retrieved from remote locations, site IDs make it easier to identify the location where the data was generated.

So that Central can identify your site when it receives your data, you must set up a Site ID record at Remote. When your remote site information is set up at Central, this same Site ID must be included in Central's information for your remote site.

You must also identify your shared directory. This shared directory is where the data that is being received from Central resides.

To Add Your Site ID

- 1 At Remote, on the **Activities** menu, select **Site ID Setup**. The Setup Site ID dialog box appears. In the **Practice** field, the practice name set up in Cornerstone Foundation Practice Information appears by default.
- 2 In the **Site ID** field, enter an ID for the site. The ID can be letters, numbers, or a combination of letters and numbers. You choose the

ID. Communicate this ID to Central because the ID must match the Site ID used in the Central database.

Note You must set up the remote site ID before Central can set up your site information in the Central database.

3 In the **Cornerstone directory share name** field, enter your machine (computer) name or remote server's IP address followed by \cstone, e.g., machine name\cstone.

Note If you do not know your machine name or remote server's IP address, call Software Support at 1-800-695-2877 for assistance.

4 Click **OK**.

Initial Central Setup



Set Up Security in Central

Due to its confidential nature, separate security instructions are not provided in this book. To set up security for each staff member, choose **Security Setup** on the **File** menu, and follow the instructions provided separately.

Set Up Central Preferences

Through Preferences, you can do the following:

- Set up location information (name, address, phone #, etc.) for the Central site. (This information must be entered before using Cornerstone Central Practice Explorer reports.)
- Select default settings for unit of measure, dispensing fee amount, and beginning invoice item ID.
- Determine where the toolbar appears on the Cornerstone Central window.

To Enter the Central Information

- 1 On the **File** menu, choose **Preferences** and then choose **Central Information**. The Central Information dialog box appears.
- 2 Type the **Name**, **Address**, **City**, **State**, **Postal code**, and **Phone** and **Fax** numbers of the Central location.
- 3 Click **OK**.

To Set the Defaults

- 1 On the **File** menu, choose **Preferences** and then **Defaults**. The Setup Defaults dialog box appears.

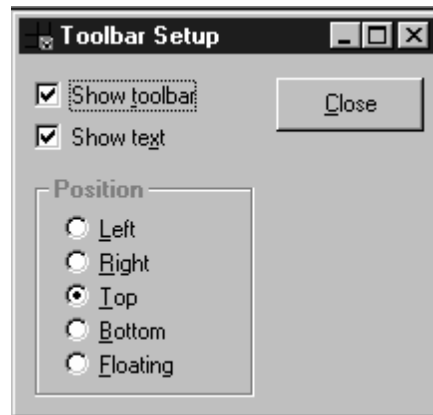
Setup Defaults dialog box

- 2 Select the **Unit of Measure** to appear by default when setting up new invoice items.
- 3 Type the **Dispensing Fee** to appear by default when setting up new invoice items.

- 4 Type the beginning **Invoice Item ID**. IDs are automatically generated; however, you can change the ID when you enter a new invoice item.
- 5 Enter the name and location of the reminder file. The default name is central_remind.txt.
- 6 Make sure the **Use default communication system check** box is checked.
- 7 Click **OK**.

To Change the Toolbar

- 1 At Central, on the **File** menu, choose **Preferences** and then **Toolbar**. The Toolbar Setup dialog box appears.



- 2 Select **Show Toolbar** to display the toolbar.
- 3 Select **Show Text** to display helpful text on the toolbar button.
- 4 If **Show Toolbar** is selected, specify where you want the toolbar to appear in the window.
- 5 When finished, click **Close**.

Set Up Staff Members

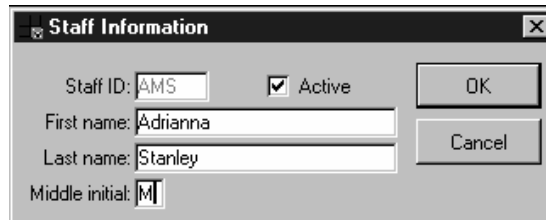
You must add the staff members who will use Cornerstone Central.

➤ Before beginning to set up all staff members, set up at least one staff member as an administrator, and then log off, and log on as the administrator. *See the security instructions provided separately.*

To Set up Staff Members

- 1 At Central, on the **Lists** menu, select **Staff Members**. The Staff Members List appears.
- 2 Click **New**. The Staff Information dialog box appears.
- 3 Type a **Staff ID**. (Up to three characters.)

- To prevent a staff member from logging into the Central server, deselect the **Active** box.
- Type the staff member's **First Name**, **Last Name**, and **Middle Initial**.



Staff Information dialog box

- Click **OK**.
- Repeat steps **2 - 6** to add more staff members.
To update staff member information, select the staff member and then click **Update** to modify the Staff Information.
To delete a staff member, select the staff member and click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

Set Up Site Region Descriptions

In the Cornerstone Central database, each remote location must be set up as a site with a Site ID. Because each site must be included in a Site Region, before you can set up a site, you must set up Site Regions. A Site Region includes a group of sites organized by similar properties, such as location, market size, ownership, or time zone.

The Central server sends invoice item information to remote sites and site regions through transmission groups.

Note Site regions appear when you set up regional pricing in the Setup Invoice Item Information dialog box.

- On Central, on the **Lists** menu, select **Regions**. The Site Region List appears.
- Click **New**. The New Region dialog box appears.
- Type the region **Description**.
- Click **OK**.
- Repeat steps 2-4 to add another region.
To modify a region description, select the site region and then click **Update**. Change the **Description**.
To delete the site region, select the region and then click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

Set Up Site Information


- 1 On Central, on the **Lists** menu, select **Sites**. The Site List appears.
- 2 Click **New**. The New Site dialog box appears.

If you do not know the remote server's IP address, call 1-800-695-2877.

The 'New Site' dialog box is shown with the following fields and options:

- Site ID: [] Description: []
- Contact: []
- Region: [] Phone: [] - []
- Address: [] Fax: [] - []
- City: []
- State: [] Postal code: []
- Connection information:
 - Connection: Direct Modem
 - Connect time: []
 - Try to connect: [] times
 - Timeout: [] seconds
 - Connection name: [] Password: []
 - Computer name\sharename: **REMOTE SERVER'S IP ADDRESS**
 - DB server name: []

New Site dialog box

- 5 In the **Site ID** field, enter the site ID that the remote location used when it set up its Site ID record. The two IDs must match. This ID is associated with the computer name/sharename (see below) and links the remote site to Central. See "Set Up Your Site ID at Remote" on page 6.
- 6 In the **Contact** field, enter the name of the contact person at the remote site.
- 7 In the **Region** field, click the down arrow  to the right of the field. From the drop-down list, select the site region (group) to assign the new site to. This group is listed with the individual sites in Transmission Groups dialog box, and as a region in Setup Invoice Item regional pricing and Mass Markup.
- 8 Enter the remote site's **Phone** and **Fax** numbers, **Address**, **City**, **State**, and **Postal code**.
- 9 At **Connection**, select **Direct**.
- 10 In the **Connect time** field, enter the time of day that you want the summary data files retrieved from this remote site, e.g., 12:15 AM.
- 11 In the **Try to Connect** field, enter the number of times to try to connect to the remote site.
- 12 In the **Timeout** field, enter the number of seconds to wait for the computer to find the necessary files before disconnecting. If nothing is entered, the system waits 300 seconds.

- 13 In the **Connection Name** field, enter a name for the connection to the remote. This is a required field; however, you choose the name you want to use.
- 14 If applicable, in the **Password** field, enter the password of the remote site.
- 15 In the **Computer name\sharename** field, enter your remote server's IP address followed by \cstone, e.g., IP address\cstone.

Note If you do not know your remote server's IP address and do not know how to find it, call Software Support at 1-800-695-2877 for assistance.

- 14 In the **DB Server Name** field, enter the database server name of the Cornerstone server at the remote site. The database server name is usually **cstone**. However, depending on your configuration your database server may be different.

Note If the database name is incorrect, a 999 error message appears when Central attempts to connect to the remote site.

- 15 Click **OK**.

- 16 Repeat steps 2 – 14 to add another site.

To modify a site's information, select the site and then click Update. Change the applicable information.

To delete the site, select the site and click Delete. A message appears asking you to confirm the decision. Click **Yes**.

Fill Central database with Invoice Items, Units of Measure, Species and Sex IDs

Your Central database does not include any invoice items and species.

To fill the Central database with existing invoice items and species, choose **one** of your remote locations and run a custom Cornerstone program to copy your invoice items, units of measure, species and sex ID to disk. Take the disk to the Central location and run the same custom program to place the extracted data in the Central database.

To copy invoice items, units of measure, species and Sex IDs from a main or remote server

Do not perform this step more than **once**. Running this custom program will take the species, invoice items, units of measure and sex IDs from a Remote site and load it into the Central database.

Note If you have more than one remote site, run this program on the Remote server that has the database you want to copy to Central.

- 1 On the selected remote server, click the **Start** button and then select **Run**.
- 2 In the *Open* box, type **csextrac** to open the program. If the program does not run, enter the full path to the program, e.g. **c:\cstone\csextrac**.
- 3 Click the **Extract** button.
- 4 The system prompts "Are you at your Central Management Site?" Insert a blank disk into your drive. Click **No** to save the files to a *floppy* disk. You may need more than one disk.
- 5 After saving the files to disk, the system displays a message telling you to take the disk to the Central site. Click **OK** and then click **Close** to exit.

To place extracted data in Central database

- 1 At Central, click the **Start** button and then select **Run**.
- 2 In the *Open* box, type **csextrac** to open the program. If the program does not run, enter the full path to the program, e.g. **c:\cstone\csextrac**.
- 3 Click the **Insert** button.
- 4 The system prompts "Are you importing files from floppy disks?" Click **No** unless you are using floppy disks. Press **Enter** when ready.
- 5 When done, the system displays a message telling you the process is finished. Click **OK** and then click **Close** to exit.

Set Up Invoice Items

Set up the invoice item classifications, units of measure and invoice items in Cornerstone Central in order to update remote sites' databases.

- **Invoice item classifications** are used to group common types of service and inventory invoice items in Cornerstone. Examples of classifications include anesthesia, diet or supplies.
- Common weights, measurements and amounts need to be set up in the Central database. Bottle, capsule, cc and tablet are examples of invoice item **units of measure**.
- Finally, you must set up the **invoice items** to maintain in the Cornerstone Central database.

To Set up Invoice Item Classifications

Remote site invoice item classifications must match Central invoice item classifications in order for invoice items to be accepted at the remote site.


- 1 On the **Lists** menu, choose **Invoice Items** and then **Invoice Item Classes**. The Invoice Item Classification List appears.
- 2 To add a classification, choose **New**. The Invoice Item Classification Information dialog box appears.

- 3 Type a **Class ID** (of up to seven characters) and **Description**.
- 4 Click **OK**.
- 5 Repeat steps 2 - 4 to add another classification.
To modify a classification description, select the classification, and click **Update**. Change the **Description**.
To delete the classification, select the classification and then click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

To Set up Units of Measure

- 1 On the **Lists** menu, choose **Invoice Items** and then **Unit of Measure**. The Invoice Item Units of Measure list appears.
- 2 Click **New**. The Invoice Item Unit of Measure Setup appears.
- 3 Type a unit of measure **Description**.
- 4 Click **OK**.
- 5 Repeat steps 2 - 4 to add another unit of measure.
To modify a unit of measure description, select the classification, and click **Update**. Change the **Description**.
To delete the unit of measure, select the unit of measure and click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

You cannot delete a unit of measure that is linked to an invoice item.

 You can set up a unit of measure as a default to use when entering invoice items. See “To Set the Defaults” on page 8.

To Set up Invoice Item Information

- 1 On the **Lists** menu, choose **Invoice Items** and then **Invoice Items**, or click the **Invoice Item** toolbar button. The Invoice Items List appears.
- 2 Click **New**. The Setup Invoice Item Information window appears.

Setup Invoice Item Information window

- 3 If you enter new IDs manually, type the **invoice item ID** (up to seven characters).
If you have set up an invoice item ID in the defaults, the next available number appears. You can change this number, if necessary.
- 4 Type the **Hospital Description** and the **Client Description** of the invoice item. (Invoices display the client description, if the item has one.)
- 5 Specify the **Type** of item: Service, Inventory, Group, Pick or Dispensing. If you select **Group**, see the instructions “To Group Invoice Items” on page 18 before continuing. If you select Pick or Dispensing, for more information, see the applicable section in the *Cornerstone Reference Manual*.
- 6 In the **Status** field, select the status of the item. For a new item, do not change the default status of active. Mark an invoice item as inactive only when you have discontinued use of the item and do not want it to display on lookup lists related to invoicing.
- 7 Enter the **Classification**. You can press **F2** to select a classification. If desired, enter the **Subclass**. Press **F2** to select a subclass.
- 8 Select a **Unit of Measure** for the item. If you do not want to use a unit of measure with the item, select **[None]**.
- 9 Select whether this item is a **Miscellaneous Item**, a **Controlled Substance** or a **Hazardous Material**.

To Enter Invoice Item Pricing Information

The pricing set up under Pricing Information is automatically sent with the item's information to the remote site, **unless** the site is included in a site group that has regional pricing set up for the item. (If nothing is set up for the regional pricing, it still sends the default price.) See "To Set Regional Pricing" on page 17.

- 1 Under *Pricing Information* in the Setup Invoice Item Information window, type the **Base Amount** to charge for this item. If you have quantity discounts (tiered pricing) for the item and want this pricing calculated automatically, type the minimum **Quantity** and **Price** under *Quantity* and *Amount* after the Base Amount.
- 2 Type the **Minimum Price** for the item and the **Dispensing Fee**, if applicable.
- 3 Select the **Omit Dispensing Fee for Multiple Patients** check box to charge the dispensing fee one time per invoice. (Use this check box if you do **not** want multiple patients in the same household charged the dispensing fee for each patient, when the item is packaged together for all patients.)
- 4 Type an **Estimate Markup** percentage, if applicable. The estimate markup is the item's percentage markup used to calculate the high range on estimates.
- 5 In the **Allow Change** field, select one of the following options:
 - **Always** allow price to be overwritten.
 - **Never** allow the price to be overwritten, unless the user has administrator security privileges.
 - **Only increases** only allows the price to be increased, never decreased.
 - **Only with reason** allows the price to be changed, but a reason must be entered for the change. To use this option, you must create a list of price change reasons in your Cornerstone Foundation software. Do this at each remote location. On the Cornerstone Foundation's **Main menu**, click **Controls** and select **Price Change Reasons**.
 - **Require Change** always forces the price to be changed. This safeguard is used in cases where the price fluctuates and ensures that the correct price is charged. The price on the item must be set to zero.
- 6 If you want to apply a dispensing item to this invoice item, click the **Dispensing** button. Dispensing items cannot be used alone, but instead are linked to an inventory item.
- 7 Set up regional pricing for the item or choose **OK**. See "To Set Regional Pricing" on page 17.

To modify invoice item information, select the item and click **Update**. You can change any information except the ID.

To delete an invoice item, select the item and click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

To Set Regional Pricing

After entering an item's information in the Setup Invoice Information dialog box, do the following if you want to apply different prices for the item based on its region:

- 1 On the Setup Invoice Item Information window, click **Region** to set up specific prices to apply to different site regions. The Select Region dialog box appears.
- 2 Select the **Region** to set up specific pricing for and then click **OK**. The Regional Pricing dialog box appears.

Quantity	Amount
Base	\$.00
.00	\$.00

Minimum price: \$.00 Dispensing fee: \$.00

Estimate markup: .00 % Omit dispensing fee for multiple patients

Buttons: Dispensing, OK, Close

Regional Pricing dialog box

- 3 Type the item's price **Base Amount**. If you want quantity pricing calculated automatically for this item, type the minimum **Quantity** and **Price** in the additional rows as necessary.
- 4 Type the **Minimum Price** for the item and the **Dispensing Fee**, if applicable.
- 5 Select the **Omit Dispensing Fee for Duplicate Patients** check box to charge the dispensing fee one time per invoice. (Use this check box if you do **not** want multiple patients in the same household charged the dispensing fee for each patient, when the item is packaged together for all patients.)
- 6 Type an **Estimate Markup** percentage, if applicable. The estimate markup is the item's percentage markup used to calculate the high range on estimates.
- 7 If you want to apply a dispensing item to this invoice item, click the **Dispensing** button. Dispensing items cannot be used alone, but instead are linked to an inventory item.
- 8 Click **OK**.
- 9 Repeat steps 1 - 8 to set up pricing for additional regions.

☞ Choose **Set All** to apply the default pricing information in the Setup Invoice Item Information to all regions (which includes every site).

To Group Invoice Items

- 1 In the Setup Invoice Information dialog box, specify **Group** as the invoice item **Type** and then click the **Group Items** button. The Group Item Information dialog box appears.

Tip If this is a new group, in the **Copy line items from group ID** field, press **F2** to select invoice items from another group.

- 2 Enter the **Item ID** of each item in the group or press **F2** to select an item from the Invoice Item List.
- 3 Type the **Quantity** of each invoice item in the group.
- 4 To designate an invoice item as a Smart code, click in the *Smart* column. For more information about Smart codes, see the Cornerstone Reference Manual.
- 5 From the Printing option drop-down menu, select how you want the group to print on invoices.
- 6 Click **OK**.

Note When remote sites use group items, the pricing information is taken from the *individual* invoice item's information, not the group item. Therefore, if an individual item is not updated in the remote site's Cornerstone database, the same item within a group will not contain accurate price information.

Set Up Species

In order to print statistical reports by species, you must set up all of the species used by your sites. A number of standard species are preloaded when you run *csextract*. You can also set up additional species.

To Set up Species

- 1 On the **Lists** menu, choose **Species**. The Species List appears.
- 2 To add a new species, click **New**. The New Species dialog box appears.
- 3 Type a **Species ID** (of up to seven characters) and the **Description**.
- 4 Click **OK**.
- 5 Repeat steps **2 - 4** to add another species.

To modify a species description, select the species, and then click **Update**. Change the description.

To delete the species, select the species, and then click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

To Set up Sexes

A number of standard sexes are preloaded when you run *csextract*. You can also set up additional sexes.

- 1 On the **Lists** menu, choose **Patient Sexes**. The Sexes List appears.
- 2 To add a new species, click **New**. The New Patient Sex dialog box appears.
- 3 In the **Description** field, type a description of the sex.
- 4 Click **OK**.
- 5 Repeat steps **2 - 4** to add another sex.

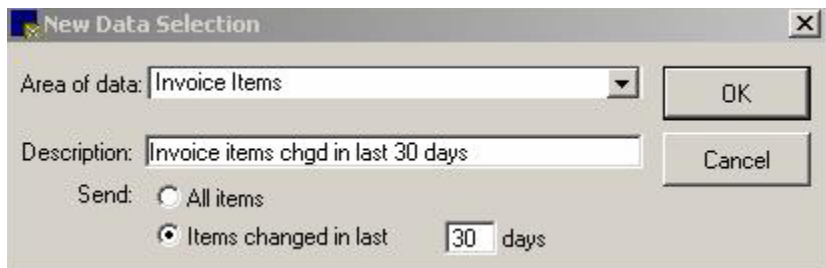
To modify a sex description, select the sex, and then click **Update**. Change the description.

Set Up Data Selections

The type of information to send to remote sites (in order to update their databases) is set up in the Data Selections dialog box.

To Set up Data Selections

- 1 On the **Lists** menu, choose **Data Selections**. The Data Selection List appears.
- 2 Click **New**. The New Data Selection dialog box appears.



New Data Selection dialog box

- 3 Select the **Area of Data** to update. (Currently you can only update Invoice Item Information.)
- 4 Type the Data Selection **Description** to appear in the Data Selection List.
- 5 Specify whether to **Send** all items or items changed within a specified number of days. If you specify **Items Changed in Last __ Days**, type the number of days.

Note Sending **All Items** may take several minutes for the remote site to receive.

6 Click **OK**.

7 Repeat steps 2 - 6 to add another data selection.

To modify a data selection, select the data selection, and then click **Update**. Change the **Description**, items to **Send**, or when to send data.

To delete the data selection, select the data selection, and click **Delete**. A message appears asking you to confirm the decision. Click **Yes**.

Note You cannot delete a data selection that is linked to a transmission group.

Set Up Transmission Groups

Set up the types of changes and where to send them in the Transmission Groups dialog box. You must also schedule when the transmission will be sent, although you can send a transmission at any time in addition to the scheduled time by choosing **Transmit Group Now** on the **Activities** menu.

To Set up Transmission Groups

- 1 On the **Lists** menu, choose **Transmission Groups**. The Transmission Groups List appears.
- 2 Click **New**. The Transmission Group dialog box appears.

The screenshot shows the 'Transmission Group' dialog box. It features a 'Description:' field at the top left. Below it are two list boxes: 'Data Selection' and 'Sites'. The 'Data Selection' list contains 'invoice items chgd in last 30 days' and 'All invoice items'. The 'Sites' list contains 'West Region' and 'South region'. Between the lists are buttons for 'Add', 'Add all', 'Clear', and 'Clear all'. To the right of each list is a text box labeled 'Send this' and 'Send to'. At the bottom, there is a 'Transmission schedule type' section with radio buttons for 'One time', 'Daily', 'Weekly', 'Monthly - day', and 'Monthly - date'. Below this is a 'One time' section with 'Date' and 'Time' input fields.

Transmission Group dialog box

- 3 Under *Data Selections*, click the **Data Selection** that this transmission group updates. Click **Add** to place it into the Send This box. Repeat this for each type of update you want sent with this transmission.

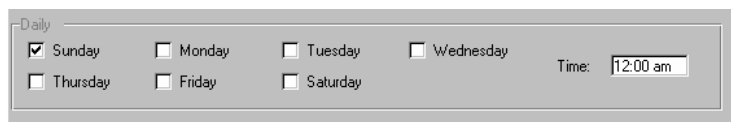
If you add a region, each site in that region is individually added to the Send To list.

To send all of the data selections, click **Add All**.

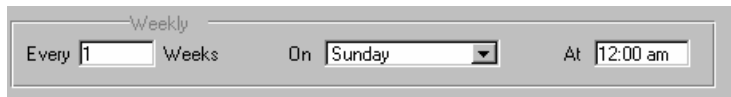
- 4 Under *Sites*, click the **Site** or **Region** to send the selected updates to, and click **Add** to enter the sites into the Send To box. Repeat this for each applicable site or region.

To send to all of the sites, click **Add All**.

- 5 Under *Transaction Schedule Type*, choose one of the following options:
 - Specify **One Time** and the **Date** and **Time** if you do not want this transmission to send the selected update regularly.



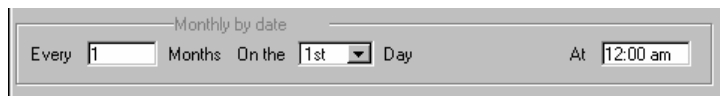
- Specify **Daily** to send this transmission each day. Enter the day of the week and type the time.



- Specify **Weekly** to send the update less frequently than daily, and more frequently than monthly. Enter the frequency, day of the week, and time to send the update.



- Specify **Monthly - Day** to send the update monthly on a specific day of the week. Enter the frequency, day of the week and time to send the update.



- Specify **Monthly - Date** to send the update every number of months on a specific date. Enter the frequency and time information.

- 6 When finished, click **OK**.
- 7 Repeat steps **2 - 6** to add another transmission group.

To modify a transmission group, select the group, and then click **Update**. Change the **Data Selections**, **Sites** or **Transmission Schedule**.

To delete a transmission group, select the group and then choose **Delete**.

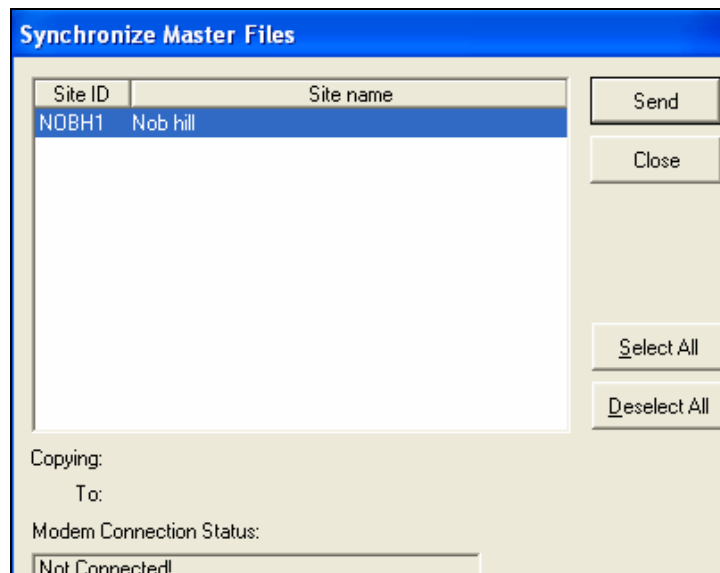
Synchronizing IDs with Remote Sites

In order for remote sites to update their item information with data sent from Central, the remote sites must link their species IDs, units of measure, invoice item IDs and sex IDs with the IDs used by Central.

After you set up the species IDs, units of measure and invoice item IDs on Central, you can update the choices available at remote sites by synchronizing master files. This process sends the IDs used by Central to the selected remote sites and then updates the options the remote sites can use to link their IDs.

To Synchronize Master Files

- 1 At Central, on the **Tools** menu, choose **Synchronize Master Files**. The Synchronize Master Files dialog box appears.



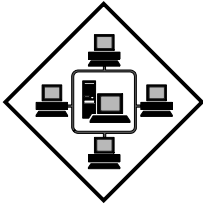
- 2 Deselect any remote sites that you do not want synchronized and click **Send**. The synchronization process begins.

Note You can view the status of the synchronization by reading the information in the **Modem Connection Status** box at the bottom of the Synchronize Master Files dialog box.

- 3 Click **Close** after all connections have been disconnected.

Note After the synchronization is completed, the selected remote sites must update their ID links (Invoice Item links, Species links, Unit of Measure links and/or Sex ID links). See "Maintain Remote links to Central" on page 23.

Maintain Remote links to Central



Set Up Species Links

The species links must be set up before End-of-Period information can be extracted in order to correctly report statistics by species.

If a remote site's species ID and description already match the Central species ID and description, the ID appears in a gray box and cannot be changed.

If either the remote site's species ID or description differs from the Central ID or description, the ID appears in a white box and can be linked.

To Add Species Links

- 1 At the remote location, on the **Activities** menu, click **Species Link Setup** or click the **Species Link** toolbar button. The Species Link dialog box appears.

You can choose to sort the species by ID or Description.

Species ID	Species name	Central species ID
AVI	AVIAN	BOO
BOV	BOVINE	BOV
CAN	CANINE	CAN
CAP	CAPRINE	CAP
CHI	CHINCHILLA	CHI
CLG	CASH LARGE	CLG
CSM	CASH SMALL	CSM
DOG	CANINE - Adult	DOG
EQU	EQUINE	EQU
FEL	FELINE	FEL
FER	FERRET	FER

- 2 Species ID **and** description that do not match the species ID **and** description in the Central database appear in a white box. Click the down arrow to display the list of species available from Central. From the list, click the species ID to link.

Note If all of the IDs from the Central database are already linked, nothing appears in the drop-down list. By default, Cornerstone Remote enters the species ID your site has assigned to that species. Select a different ID from the drop-down list, if necessary.

- 3 Repeat step 2 to link another species
- 4 When finished, click **OK**.

Set Up Unit of Measure Links

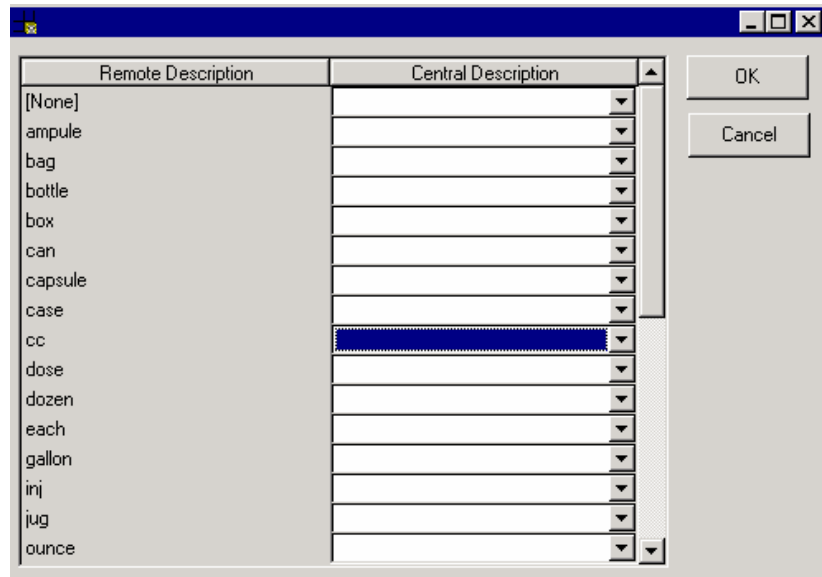
You must set up Unit of Measure links to properly identify a Remote site's units of measure to Central.

If the unit of measure and description already match the Central unit of measure and description, the unit of measure appears in a gray box, and cannot be changed. If either the unit of measure or description is different, the unit of measure appears in a white box and can be linked.

Note Initially, all boxes are white and you must link each remote unit of measure description to the applicable unit of measure description from Central. If no applicable unit of measure exists at Central or if it has already been selected once, select **Do Not Link** from the *Central Description* drop-down list.

To Add Unit of Measure Links

- 1 At the remote location, from the **Activities** menu, choose **Unit of Measure Link Setup** or click the **Unit of Measure Link** toolbar button. The Setup Unit of Measure Links dialog box appears.



Setup Unit of Measure dialog box

- 2 Any unit of measure **and** description that do not match the ID **and** description in the Central database appear in a white box. Click the down arrow to display the list of units of measure. From the list, click the unit of measure to link.

Note If all units of measure from Central are linked, nothing appears in the drop-down list. By default, Cornerstone Remote

enters the unit of measure your site has assigned. Select a different ID from the drop-down list, if necessary.

- 3 Repeat step 2 to link another unit of measure or click **OK** to exit.

Set Up Invoice Item Links

The invoice item links must be set up to properly identify the Remote site's invoice items to Central. Invoice items must be linked before End-of-Period information can be extracted from the remote site.

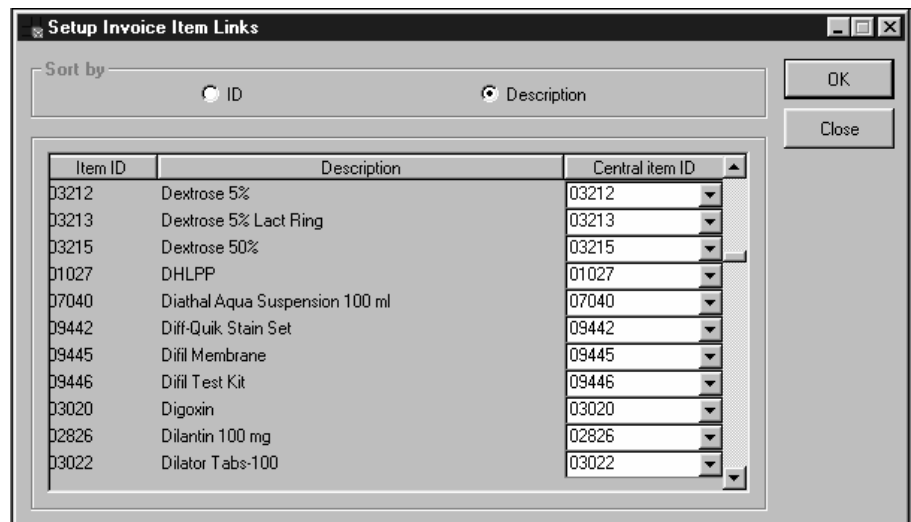
When Central sends updates to invoice item information, you can see which items at your site vary from those at the Central.

If your site's invoice item ID and description match the Central invoice item ID and description, the ID appears in a gray box and cannot be changed. If either the invoice item ID or description is different, the ID appears in a white box and can be linked.

To Add Invoice Item Links

- 1 At the remote location, from the **Activities** menu, choose **Invoice Item Link Setup**, or click the **Invoice Item Link** toolbar button. The Setup Invoice Item Links dialog box appears.

You can choose to sort invoice items by ID or description.



Setup Invoice Item Links dialog box

- 2 Any invoice item **and** description that do not match the ID **and** description in the Central database, appear in a white box. Click the down arrow to display a list of Central invoice items. From the list, click the Central item to link to the Remote invoice item.

Note If all of the IDs from Central are linked, nothing appears in the drop-down list. By default, Cornerstone Remote enters the invoice item ID your site has assigned to the item. Select a different ID from the drop-down list, if necessary.

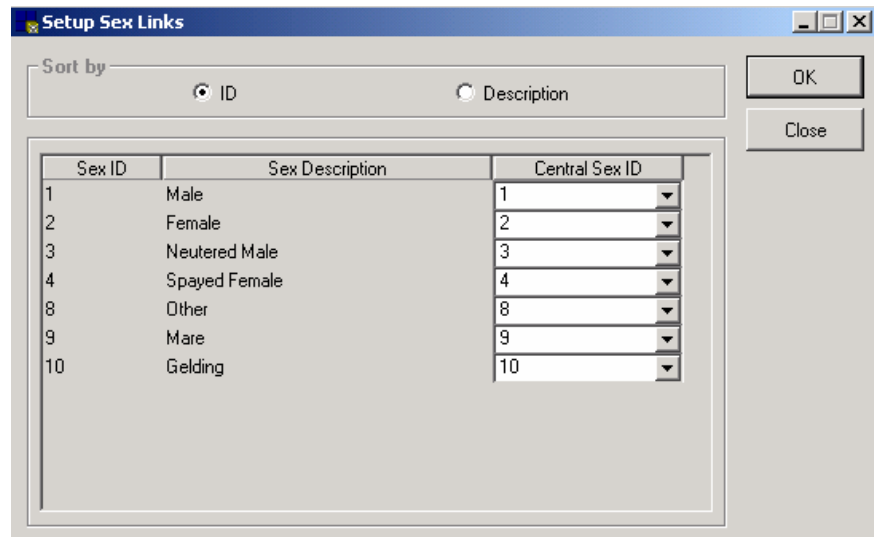
- 3 Repeat step 2 to link another item.
- 4 When finished, click **OK**.

Set Up Sex ID Links

You must set up sex links to properly identify sexes at the Remote location to Central.

If the remote site's sex ID and description match the Central sex ID and description, the ID appears in a gray box and cannot be changed. If either the sex ID or description is different, the ID appears in a white box and can be linked.

You can choose to sort the sexes by ID or description.



Setup Sex Links dialog box

- 1 At the remote location, on the **Activities** menu, choose **Sex ID Link Setup** or click the **Sex ID Link** toolbar button. The Setup Sex Links dialog box appears.
- 2 Any sex ID and description that does not match a sex ID and description in the Central database appears in a white box. Click the down arrow to display a list of available sexes. From the list, select the sex to link.
- 3 Repeat step 2 to link another sex.
- 4 When finished, click **OK**.

Using Cornerstone Central

Introduction


Central is the hub of the Cornerstone Central and Remote programs. Use Central to do the following:

- Maintain the database of invoice item information.
- Collect information from remote sites and generate collective reports.
- Print reminders.

Logging on to and out of Cornerstone Central

To protect the information you keep in the Cornerstone Central database, you can limit staff members' access to certain areas of the Central software through the security feature. Because different security levels can pose a problem if several staff members use the same computer, Cornerstone Central software allows you to enter a password at any time to change the security level access for the current user.

The current user can also log off without exiting Cornerstone by choosing **Log Off** on the **File** menu. Logging off forces the next user to log on before using Cornerstone Central software.

 **Important!** Exercise care when changing users. The database records the user who is logged on when it saves information.

To Enter a Password

Cornerstone Central software automatically prompts you for your password when you start the program; however, you can change users at any time.

- 1 To enter a password, on the **File** menu, select **Password Entry**. The Cornerstone Central Login dialog box appears.
- 2 In the **User** field, type or select your name or ID.
- 3 In the **Password** field, type your password. As you type your password, asterisks appear in place of the characters.
- 4 Click **OK** or press **ENTER**.

Updating Invoice Item Information at the Central Site

The Central database maintains common invoice item information for all Cornerstone remote sites. Invoice item information should be modified at the Central location and then sent to the remote sites to update each individual practice's Cornerstone database.

You can change most information for individual items, or you can mass markup (or markdown) price information for a particular item, or invoice item classification or subclass, either by a specified dollar amount or by a percentage.

To Update Invoice Item Information

- 1 On the **Lists** menu, choose **Invoice Items** and then **Invoice Items**, or click the **Invoice Item** toolbar button. The Invoice Items List appears.
- 2 Select the item to update and click **Update**. The Setup Invoice Item Information appears.
- 3 Change the applicable item information. *See the following instructions to mass markup prices by region.*
- 4 Click **OK**.

To Mass Markup Prices by Region

Important! We strongly advise making a backup of your database before mass marking invoice items.

- 1 On the **Activities** menu, choose **Regional Mass Markup**. The Select Region dialog box appears.



If you choose Default region, Mass Markup uses the items' default pricing information.

- 2 Select the **Region** to change pricing for and then click **OK**.

- To narrow the list of items to display, enter an invoice item **Class** and/or **Subclass**. Press **F2** to select a class or subclass from a list. To change one item, enter a specific **Item ID**.

You can also select or deselect the **Type** of invoice items to include in the list. You can select service items only, inventory items only or both.

Choose **Get Data** to display all of the invoice items in the database (except group items) and the current price of each item for the selected region.

- Specify whether to **Mark Up** or **Mark Down** the prices of the selected group. Mark up is the default.
- Select the **Nearest** amount to round uneven amounts. The list includes: \$0.01, 0.05, 0.10, 0.25, 0.50, and 1.00. The default is \$0.01.

Rounding

If this number	is rounded to the nearest	during Markup it will become	during Markdown it will become
2.522	.01	2.52	2.52
	.05	2.55	2.50
	.10	2.60	2.50
	.25	2.75	2.50
	.50	3.00	2.50
	1.00	3.00	2.00

- Type or select the **Percentage** to change prices. If you are changing prices by a flat dollar amount, leave the percentage at **.00%**.

- 7 Type the **Minimum Amount** to change a price. If you are changing prices by a flat dollar amount, type the dollar amount in the box.
- 8 Select **Include Zero** to change items with no current price by the minimum amount.
- 9 Deselect the **Modify** checkmark button if you do not want an invoice item affected by the price change.
- 10 Choose **Calculate** to see the effect of the price change in the Price column. (The change is not applied to the checked items until you choose **Apply**. After viewing the new prices, if you decide you do not want to make the change, click **Cancel** or deselect specific items that you do not want to change.)

New Price =

Greater of:

Old Price + (Old Price * % Price Change)

OR

Old Price + Minimum Amount Change

Rounding is performed last.

- 11 Click **Apply** to apply the new pricing.

Regional Dispensing Items

When you set up an invoice item, you can assign dispensing items to it. With the Regional Dispensing Items feature in the Central software, you can also assign dispensing items to selected items in a region. This allows different regions to apply different dispensing items.

To Set Up Regional Dispensing Items

Important! We strongly advise making a backup of your database before setting up regional dispensing fees.

- 1 On the **Activities** menu, choose **Regional Dispensing Items**.
- 2 A message appears that prompts you to backup your database. Make sure a backup has been made and click **Yes** to continue. The Select Region dialog box appears.
- 3 Select the region to which you want the dispensing item or items to apply and click **OK**. The Apply Dispensing Items window appears.
- 4 Choose one of the following options:
 - If you want the item to apply to a particular class, enter the **Class ID** (or press **F2** to select from list) and click **Get Data**.
 - If you want the item to apply to a particular sub-class, enter the **Class ID** and **Subclass ID** (or press **F2** to select from list) and click **Get Data**.
 - If you want the item to apply to an individual invoice item, enter the item's **ID** (or press **F2** to select from list) and click **Get Data**.
- 5 The selected invoice item or items appear in the window. A list of dispensing items also displays.

Item ID	Description	Disp Item ID	Dispensing Item Description	Region
01066	Docusate Sodium			Default
02005	Dexamethasone 0.25mg			Default
02006	Doxycycline 100MG			Default
02010	Banamine 50 mg/50 ml			Default
02016	Diphenhydramine Capsules 25mg			Default
02017	Benadryl 50 mg			Default
02102	Pediapred Oral Solution			Default

Dispensing Item ID	Dispensing Item Description
DISP1	Dispensed In-Hospital
DISP2	Dispensed to Client

- 6 Select the invoice items to which you want the dispensing item or items to apply. To select more than one item, hold the **Ctrl** key and click the items you want to select. To select all items, click **Select All**.
- 7 In the *Dispensing Item* section, click the dispensing item that you want to add to the selected invoice item or items.
- 8 Click **Add**.
- 9 When finished, click **Apply**.

To Remove a Dispensing Item

- 1 On the **Activities** menu, choose **Regional Dispensing Items**.
- 2 A message appears that prompts you to backup your database. Make sure a backup has been made and click **Yes** to continue. The Select Region dialog box appears.
- 3 Select the region in which you want to remove the dispensing item and click **OK**. The Apply Dispensing Items window appears.
- 4 Choose one of the following options:
 - If you want to remove a dispensing item in a particular class, enter the **Class ID** (or press **F2** to select from list) and click **Get Data**.
 - If you want to remove a dispensing item in a particular subclass, enter the **Class ID** and **Subclass ID** (or press **F2** to select from list) and click **Get Data**.
 - If you want to remove a dispensing item from a single invoice item, enter the item's **ID** (or press **F2** to select from list) and click **Get Data**.
- 5 The selected invoice item or items appear in the window. A list of dispensing items also displays.
- 6 Click the invoice item from which you want to remove a dispensing item.
- 7 In the *Dispensing Item* box, click the dispensing item that you want to remove.
- 8 Click **Remove**.
- 9 Repeat steps **5-8** to remove dispensing items from additional invoice items.
- 10 When finished, click **Apply**.

Sending Updated Invoice Item Information to Remote Sites

You should have set up a schedule of sending updated invoice item information to remote sites when you set up transmission groups. Transmission groups send the data selections you specify to specific sites or site groups.

You can, however, send information at any time to one transmission group by using **Transmit Group Now**.

To Immediately Send Updated Information

- 1** On the Central server, on the **Activities** menu, choose **Transmit Group Now** or click the **Transmit Group Now** toolbar button. The *Transmit Group Now* dialog box appears.
- 2** Select the **Transmission Group** to send the updated invoice item information to.
- 3** Click **Send**. Like Synchronize Master Files, the **Status** of the connection appears at the bottom of the dialog box.
- 4** After all connections are disconnected, click **Close**.

Note Before this process is complete, you must update the invoice information at your remote sites. See "Updating Invoice Item Information at the Remote Site" on page 52.

Retrieving Summary Data

Each time a Cornerstone remote site runs End of Day or End of Month or generates reminders, several files of summary data are generated and placed in a special folder (cstone\send) on the remote site's Cornerstone server.

When Central calls each remote site, it retrieves all of the files in this folder.

Updating Central

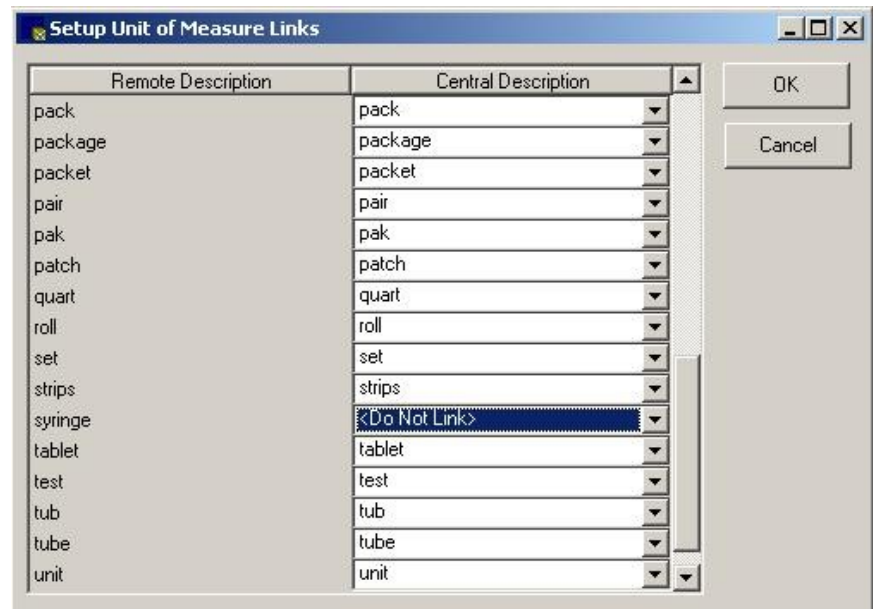
After retrieving the summary data from each Remote site, you must update Central information.

☺ Tip

To save time, update Central with the information from all of the sites at one time (after all of the Remote files have been retrieved).


To Update Central

- 1 On the **Activities** menu, choose **Update Central** or click the **Update** toolbar button. The Update Central dialog box appears displaying the retrieved files.



Update Central dialog box

- 2 Under *Files*, select the file(s) to add to the Central database. (You can use standard windows methods to select multiple files.)
- 3 Click **Add** to move the highlighted files to the *Selected* box or click **Add All** to move all of the files.
To remove files from the *Selected* box, select the file to remove, and click **Clear**, or **Clear All** to remove all of the files.
- 4 Click **OK**.

 **Important!** Choosing **New Files** will call every site to retrieve summary files. This process can take several minutes.

Verifying Transmissions

You can verify that information was sent or received from a remote site by checking the Transmission Summary.

To View Transmission Results

- 1 On the **Tools** menu, choose **Transmission Summary**. The Transmission Summary dialog box appears with the list of all of the transmissions made from the central site to remote sites, and the status of each.
- 2 Click **Close** when you have finished viewing the log.

To Purge Transmission Data

- 1 On the **Tools** menu, choose **Data Purge** and then **Transmission Log**. The Delete Transmission Log Entries dialog box appears.
- 2 Enter the date range of transmission log entries to delete in the **From** and **To** boxes.
- 3 Click **OK**. A message appears asking you to confirm the decision.
- 4 Click **Yes**.

To Recall a Remote Site to Upload Summary Data


You may have to call a remote site again for any of the following reasons:

- The remote site neglected to process End of Period, so the information was not available for Central to retrieve at the scheduled connection time.
- The remote site regenerated end-of-period data, which you need before the next scheduled connection.
- Central did not connect with the remote site within the allotted number of attempts. (This is entered in the Try to Connect box in the site's information.)

Verify with the remote site that their computer is turned on and that the summary data files are waiting to be retrieved in the cstone\send folder. To recall the site:

- 1 On the **Lists** menu, select **Sites**. The Site List appears.
- 2 Select the site to recall, and click **Update**. The site's information appears.
- 3 If the date has not changed since the Central server last tried to connect to the site, increase the number in the **Try to Connect** box by 1.
If the date is now different than the date Central last tried to connect to the site, change the **Connect Time** to 1 minute past the current system time.
- 4 Click **OK**. The Central server should try to connect to the site and retrieve the summary data.
- 5 Return changed site information to the original settings.

The system time can be found at the end of your taskbar.

 If you need to recall all of the sites, choose **New Files** on the Update Central dialog box.

Printing Reminders in Central

Reminders for a remote location can be printed from Central. To use this feature, you must set up reminder defaults for the remote location. See "To Set the Reminder Defaults" on page 5. For your convenience, special reminder templates are included with your Central software.

To print reminders from Central

- 1 On the Central server, start Microsoft® Word and from the **File** menu, select **Open**.
- 2 At the **Files of Type** drop down box, select document templates (*.dot) and from the cstone directory, select the applicable reminder template.

Note All reminder templates to be used with Central software begin with "cent," for example, centrifolds.dot. These templates include bookmarks for the specific site name and address. The templates will automatically import the central_remind.txt file that was created by the Central server during a recent update. For more information on generating reminders at a remote site, see "Generating Reminders at the Remote" on page 51.

- 3 Print your reminders as usual. For more information on printing reminders, see your *Cornerstone Reference Manual*.
- 4 After all your reminders have successfully printed, delete the central_remind.txt file from your cstone directory. It will be created again the next time you generate reminders at the remote site and send an update to Central.

Note If you do not delete the central_remind.txt file, each time you generate reminders at a remote site and send an update to Central, the new information will be appended to the existing file. The existing information will not be written over.

Reminder Templates for Central

Here is a list of the special reminder templates to be used with reminders printed from Central:

- Centemail.dot
- Centlasrem3s.dot
- Centmaillb2b.dot
- Centmaillb2.dot
- Centmaillb3.dot
- Centposterds.dot

- Centrereminder4.dot
- Centrifolds.dot

Connecting to Another Site

To Connect to Another Site

Alert Are you trying to connect to an **off-site** Remote server from your Central workstation? If yes, you must close the Cornerstone database server on your local area network or disconnect from the network. Contact support for help with this process. If you are connecting to an **on-site** Remote server, proceed with the instructions.

- 1 On the **Activities** menu, choose **Connect to Site**, or click the **Connect** toolbar button. The Connect to Site dialog box appears.
- 2 Select the site to connect to and choose **Connect**.
- 3 When you are connected to the remote site, minimize Central and open Cornerstone on your computer.

Note These instructions apply for using a Cornerstone module as well. (Open the module instead of the Cornerstone Foundation on your computer.) The remote site must be using the same version of the module as Central.

- 4 When you are finished using Cornerstone, exit Cornerstone, maximize Central and choose **Hang Up** on the Connect to site dialog box.

Generating Central Reports

You can run many reports in Cornerstone Central software or use Cornerstone Central Practice Explorer to generate reports you design.

Previewing, Printing, and Saving Reports

Cornerstone Central software includes four categories of reports:

- Client and patient reports
- Financial reports
- Inventory reports
- Sales reports

A description of the information each report contains begins in "Cornerstone Central Reports" on page 42.

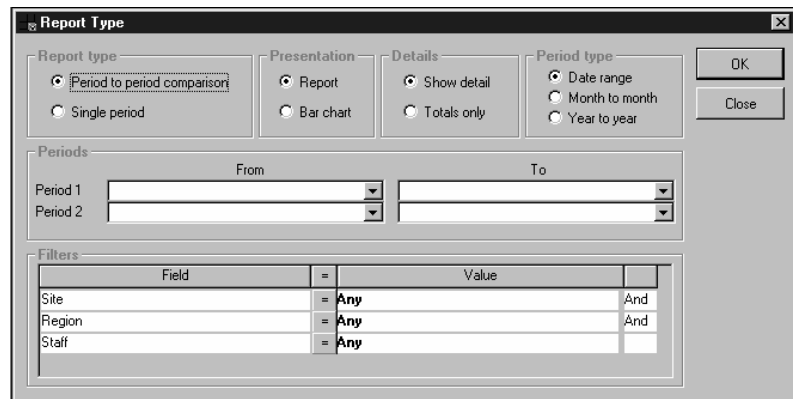
You can:

- Preview, print, or save (to a file) any of the reports.
- Specify the type of report to print and the data it will contain in the Report Type dialog box.
- Format report as a report or a bar chart.

You can only display summary data (for periods or sites) in bar charts.

To Specify the Report Type

Before you can generate a report, you must specify the type of report to generate. The Report Type dialog box appears automatically before you preview, print or save a report.



Report Type dialog box

- 1 Specify the **Report Type**, if applicable. You can specify to generate period-to-period comparisons or data from a single period for some financial reports.
- 2 Specify the **Presentation** as a report or a bar chart.
- 3 Specify the **Details** to show details or to display totals only.
- 4 Specify the **Period Type**, if applicable. You can specify to generate data from a date range, month to month, or year to year period.
- 5 If this is a period report, you must select the **Period(s)** to generate data **From** and **To**.
- 6 You can also narrow the categories of data for the report using **Filters**.

In the **Field** column, select a category of data.

In the **Value** column, enter which data from the selected field to include.

To Preview a Report or Bar Chart

- 1 On the **Reports** menu, select the **type of report** to generate. The Reports List for that category appears.

- 2 Select the specific report to generate.
- 3 Click **Preview**. The Report Type dialog box appears.
- 4 Specify the **Report Type, Presentation, Details** and **Period Type**, as applicable.

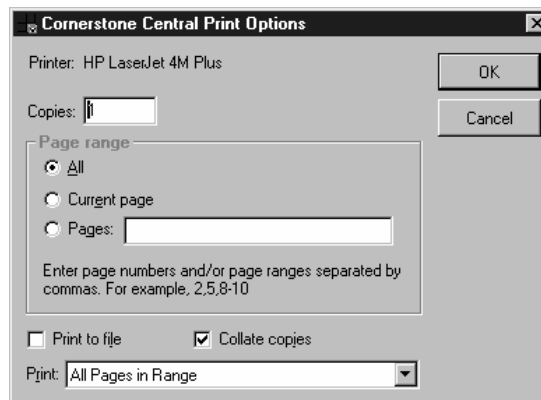
If you have chosen a Period Type, select the **Period(s)** to generate data **From** and **To**.

- 5 Enter any **Filters** to use for this report.
- 6 Click **OK** to preview the report for the selected range. The Reports Preview appears.

The top of the Report Preview displays the total amount of records in the report, the number of records selected (either all or a range), and the number of records read. It also displays the number of pages in the report and the current page being viewed.

To Print a Report or Bar Chart

- 1 On the **Reports** menu, select the **type of report** to generate. The Reports List for that category appears.
 - 2 Select the specific **report** to generate.
 - 3 Click **Print**. The Report Type dialog box appears.
 - 4 Specify the **Report Type, Presentation, Details** and **Period Type**, as applicable.
- If you have chosen a Period Type, select the **Period(s)** to generate data **From** and **To**.
- 5 Enter any **Filters** to use for this report.
 - 6 Click **OK**. The Cornerstone Print Options dialog box appears.



Cornerstone Print Options dialog box

- 7 If necessary, make changes.
- 8 Click **OK** to print the report.

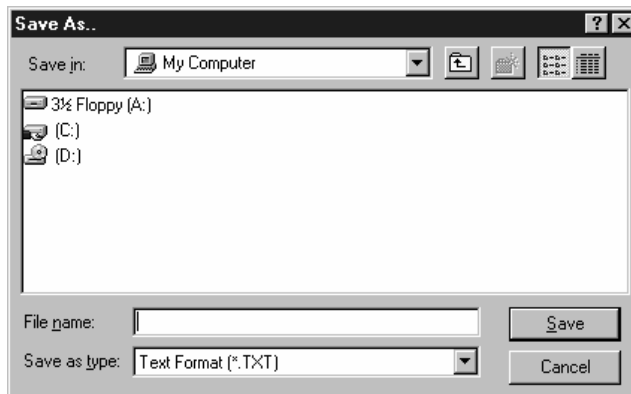
To Save a Report to a File

You do not have to save a report to a file to reprint the report at a later time. However, to import the data into another program (such as a spreadsheet or word processing program), you must save the report to a file. Formats you can save reports as include: **.doc** format (for Word) and **.txt** format (for general applications), among others.

- 1 On the **Reports** menu, select the **type of report** to generate. The Reports List for that category appears.
- 2 Select the specific report to generate.
- 3 Choose **Save As**. The Report Type dialog box appears.
- 4 Specify the **Report Type, Presentation, Details** and **Period Type**, as applicable.

If you have chosen a Period Type, select the **Period(s)** to generate data **From** and **To**.

- 5 Enter any **Filters** to use for this report.
- 6 Click **OK**. The Save As dialog box appears.



Save As dialog box

- 7 Select the **Folder** to save to and type a file name. The file saves as a **.txt** (text) file unless you type **.doc** after the file name.
- 8 Click **Save** to save the report in the specified folder.

Cornerstone Central Reports

Client and Patient Reports

Report:	Period report?	Filters:	Displays:
Active Client	No	Site, Region	Site ID, site name, number of active clients for each site
Active Patients by Species	No	Region, Site, Species	Species ID, species description, number of active patients for each species
Deceased Patients by Species	No	Region, Site, Species	Species ID, species description, number of deceased patients for each species
Inactive Patients by Species	No	Region, Site, Species	Species ID, species description, number of inactive patients for each species
New Client	Yes	Site, Region	Site ID, site name, number of new clients for the selected period(s)
Patient Visits by Species	Yes	Region, Site, Species	Species ID, species description, number of visits for each species for the selected period(s)

Financial Reports

Report:	Period report?	Filters:	Displays:
Account Adjustments	Yes	Site, Region	Site ID, site name, amount adjusted for the selected period(s)
Accounts over 30 Days	No	Site, Region	Site ID, site name, amount of the accounts over 30 days for each site
Charged on Account	Yes	Site, Region	Site ID, site name, amount charged on accounts for the selected period(s)
Discount Statistics	Yes	Site, Region, Discount Type	Site ID, description of discount, number of discounts, total amount

			of each discount for the selected period(s)
Invoice Count	Yes	Site, Region	Site ID, site name, number of invoices for the selected period
Payment Statistics	Yes	Payment Type, Region, Site	Site ID, description of the payment type, number of payments, the total amount for each type for the selected period(s)
Returned Checks	Yes	Region, Site	Site ID, site name, the total amount of returned checks for the selected period(s)
Tax Statistics	Yes	Site, Region, Tax	Site ID, description of the tax, number of times the tax was charged, total amount of each tax for the selected period(s)
Write Off	Yes	Site, Region	Site ID, site name, total amount written off

Inventory Reports

Report:	Period report?	Filters:	Displays:
Cost of Goods Sold (by Class)	Yes	Site, Region, Class	Classification ID, description of the class, the cost of goods sold (in dollars) for the selected period(s)
Cost of Goods Sold (by Item)	Yes	Site, Region, Item ID	Item ID, description of the item, the cost of goods sold (in dollars) for the selected period(s)
Inventory Adjustments (by Class)	Yes	Site, Region, Class	Classification ID, description of the class, the quantity adjusted for the selected period(s)
Inventory Adjustments (by Item)	Yes	Site, Region, Item ID	Item ID, description of the item, the quantity of the item adjusted for the selected period(s)
Inventory Internal Usage (by Class)	Yes	Site, Region, Class	Classification ID, description of the class, the quantity used internally for the selected period(s)
Inventory Internal Usage (by Item)	Yes	Site, Region, Item ID	Item ID, description of the item, the quantity used internally for the selected period(s)
Inventory Purchases (by Class)	Yes	Site, Region, Class	Classification ID, description of the classification, the quantity purchased for the selected period(s)
Inventory Purchases (by Item)	Yes	Site, Region, Item ID	Item ID, description of the item, the quantity purchased for the selected period(s)
Inventory Quantity On Hand	No	Class, Item ID, Region, Site	Item ID, description of the item, quantity on hand, the extended value (the quantity on hand * average cost)
Inventory Quantity on Order	No	Class, Item ID, Region, Site	Item ID, description of the item, the quantity on order
Inventory Returns to Vendor (by Class)	Yes	Site, Region, Class	Classification ID, description of the class, the quantity returned to vendors for the selected period(s)
Inventory Returns to Vendor (by Item)	Yes	Site, Region, Item ID	Item ID, description of the item, the quantity returned to vendors for the selected period(s)

Sales Reports

Report:	Period report?	Filters:	Displays:
Inventory Sales (by Species)	Yes	Region, Site, Species	Species ID, description of the species, quantity of inventory items sold, the dollar amount invoiced for the selected period(s)
Inventory Sales (by Staff)	Yes	Site, Region, Staff	Staff ID, staff member's name, quantity of inventory items sold, the dollar amount invoiced for the selected period(s)
Inventory Sales	Yes	Site, Region	Site ID, site name, amount (in dollars) of inventory sales for the selected period(s)
Invoice Item Sales (by Class)	Yes	Site, Region, Class	Classification ID, description of the class, quantity, dollar amount sold for the selected period(s)
Invoice Item Sales (by Item)	Yes	Site, Region, Item ID	Item ID, description of the item, quantity, dollar amount sold for the selected period(s)
Sales by Species	Yes	Region, Site, Species	Species ID, description of the species, quantity, dollar amount sold for the selected period(s)
Sales by Staff	Yes	Site, Region, Staff	Staff ID, staff member's name, quantity, dollar amount sold for the selected period(s)
Service Sales	Yes	Site, Region	Site ID, site name, dollar amount of service sales for the selected period(s)
Service Sales by Species	Yes	Region, Site, Staff	Species ID, description of the species, quantity, dollar amount for the selected period(s).
Service Sales by Staff	Yes	Region, Site, Staff	Staff ID, name of the staff, quantity, dollar amount for the selected period(s).

Using Central Practice Explorer

Practice Explorer is an additional module for use with Cornerstone. A special version of Practice Explorer comes with Cornerstone Central software. This version of Practice Explorer can only be used with Central. (If you want to use Practice Explorer with Cornerstone Foundation, the regular version of Practice Explorer must be purchased.)

Using Practice Explorer, you can:

- Gather information from your Cornerstone Central database to help you identify opportunities for your practice's growth.
- Retrieve information from your Cornerstone Central database using pre-designed Practice Explorer reports, or design your own Practice Explorer reports.

For more information on the features of Practice Explorer, please refer to the *Practice Explorer* manual.

To Access Practice Explorer from Cornerstone Central


To access the Cornerstone Central Practice Explorer, choose **Practice Explorer** on the **Activities** menu, or click the **Practice Explorer** toolbar button.

You must use Practice Explorer to create ad hoc queries; however, you cannot compare periods using Practice Explorer (unless you import the data into another program).

Central-specific Reports in Practice Explorer

Several pre-designed queries are included with Practice Explorer. These reports gather information from your Cornerstone Central database so that you can analyze the productivity of your practice and determine opportunities to generate revenue.

Because not all practices are set up in the same way, you should verify practice-specific fields, such as IDs, as well as transaction dates and some of the database fields before running a query.

Rows marked with an  should be verified or changed before running the query. In most cases, you can press **F2** to select the necessary value.

Daily Site Statistics Report #1

Lists site statistics for each site by end-of-day processing date.

SELECTION

Category	Field	Operator	Value	And/Or
Site Statistics	Site ID	=	☛ site1	And
Site Statistics	Date/Time EOD Process	=	☛ 11/23/05	

OUTPUT

Category	Field	Order	Heading	Sort	Avg/ Total
Site Statistics	Invoices	1	Invoices		
Site Statistics	Open Invoices	2	Open Invoices		
Site Statistics	Adjustments	3	Adjustments		
Site Statistics	Write Offs	4	Write Offs		
Site Statistics	Change Given	5	Change Given		
Site Statistics	Refunds	6	Refunds		
Site Statistics	Returned Checks	7	Returned Checks		
Site Statistics	Service Charges	8	Service Charges		

OMIT DUPLICATES: no

Daily Site Statistics Report #2

Lists site statistics for each site by end-of-day processing date.

OUTPUT

Category	Field	Order	Heading	Sort	Avg/ Total
Site Statistics	Preset Discounts	1	Preset Discounts		
Site Statistics	Manual Discounts	2	Manual Discounts		
Site Statistics	Taxable Merchandise	3	Taxable Merchandise		
Site Statistics	Taxable Services	4	Taxable Services		
Site Statistics	Non-Taxable Merchandise	5	Non-Taxable Merchandise		
Site Statistics	Non-Taxable Services	6	Non-Taxable Services		
Site Statistics	Sales Tax	7	Sales Tax		
Site Statistics	Current Month Charges	8	Current Month Charges		

OMIT DUPLICATES: no

Daily Payment Statistics Report

Lists payment statistics for each site by end-of-day processing date.

SELECTION

Category	Field	Operator	Value	And/Or
Payment Statistics	Site ID	=	↻ site1	And
Payment Statistics	Date/Time EOD Process	=	↻ 11/23/05	

OUTPUT

Category	Field	Order	Heading	Sort	Avg/ Total
Payment Statistics	Site ID	1	Site ID		
Payment Statistics	Date/Time EOD Process	2	Date/Time EOD Process		
Payment Statistics	Description	3	Description		
Payment Statistics	Amount	4	Amount		

OMIT DUPLICATES: no


Using Cornerstone Remote

Introduction

Cornerstone Remote collects end-of-period summary data at each remote site and transmits it to Central. Using invoice item data sent from Central, each remote site periodically updates invoice items in their Cornerstone Foundation software.

Logging on to and out of Cornerstone Remote

The current user can also log off without exiting Cornerstone by choosing **Log Off** on the **File** menu. Logging off forces the next user to log on before using Cornerstone Remote software.

 **Important!** Exercise care when changing users. The database records the user that is logged on when it saves information.

To Enter a Password

Cornerstone Remote automatically prompts you for your password when you start the program; however, you can change users at any time.

- 1 To display the Cornerstone Remote Login dialog box, on the **File** menu, select **Password Entry**.
- 2 In the **User** field, type or select your name or ID.
- 3 In the **Password** field, type your password. As you type your password, asterisks appear in place of the characters.
- 4 Click **OK** or press **ENTER**.

To View the Current Users

If you are running Cornerstone Remote on a network, it is important to be the only user logged in Cornerstone when updating invoice items. By viewing user information, you can check if other users are logged into Cornerstone.

- 1 On the **File** menu, select **User Information**. The User Information dialog box appears, showing users who are currently logged into Cornerstone at the remote site.
- 2 Click **OK**.

Generating the Summary Data

Each time you run End of Day (EOD) or End of Month (EOM) at the remote site, text (.TXT) files of summary data are automatically generated for the Central location. These files are placed in the Send folder within the shared folder for Central to retrieve. Central uses this information to generate reports.

The computer must remain on and logged on to the network (if one exists) in order for Central to access the files it needs. These files should be retrieved daily.

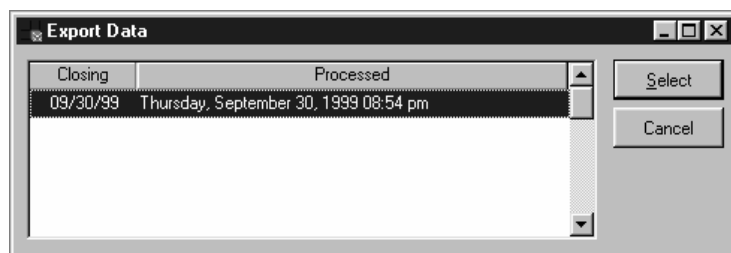
☞ Because your server will always be on, protect your hardware and phone lines with a high-quality surge protector. For more information, contact Supplies Sales (1-888-224-4408).

Extracting Previous Summary Data Files

You can recreate previous data summary files. These files are text (.TXT) files, and are saved in the Send folder within the shared folder that appears in the Setup Site ID dialog box. If Central needs information from a previous End of Day, you can regenerate the summary data using the Extract Summary Data utility.

To Extract Summary Data

- 1 At the remote site, on the **Activities** menu, select **Extract Summary Data** or click the **Extract** toolbar button. The Export Data dialog box appears.



Export Data dialog box

- 2 Select the **closing date** that contains the end-of-day information to extract.
- 3 Click **Select**. The information is extracted and saved in the Send folder.

Generating Reminders at the Remote Site

At a remote location, you can either generate a reminder file that can be transmitted to the Central server to be printed or you can generate and print reminders at your remote location. Which option you use is determined by the reminder defaults that you set up. See "To Set the Reminder Defaults" on page 5.

To Generate Reminders

- 1 At your remote site, start Cornerstone.
- 2 From the **Activities** menu, select **Generate Reminders**.
- 3 Generate your reminders as usual. For more information on generating your reminders, see your *Cornerstone Reference Manual*.
- 4 Depending on how your reminder defaults are set up, follow the applicable instructions below.
 - **If you are set up to print reminders at the Central location**, at the remote site, generate a reminder file. The reminder file is automatically placed in your Send directory. The next time you send an update to Central, the reminder file is sent. From this file, Central creates a text file called central_remind.txt and places it in your cstone directory. From the Central server, print reminders. See "Printing Reminders in Central" on page 37.
 - **If you are set up to print reminders at the remote location**, using your Cornerstone Foundation software, generate reminders. This creates the namelist.txt file and reminders can be printed as usual at the remote location.

Updating Invoice Item Information at the Remote Site

At Central, invoice item information can be changed at any time. Central then transmits these changes to the remote sites. This process ensures standardized descriptions, fees, and other invoice item information at all practice locations.

Central can send updated invoice item information to a remote site on a predetermined schedule or at any particular time. In order to receive the update, your remote server should be left on at a point past the network login.

☞ Because your server will always be on, protect your hardware and phone lines with a high-quality surge protector.

Receiving Invoice Item Updates

Before Central can download invoice item updates to your remote site, you must have already linked your remote invoice item IDs with Central. See "Set Up Invoice Item Links" on page 25.

Automatic Update of Invoice Item Information

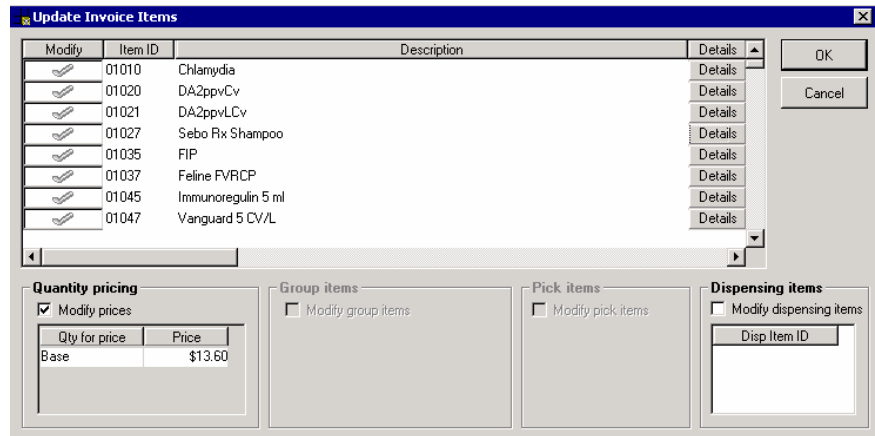
When you open the Cornerstone Remote software, if none of your staff members have security access to the Update Invoice Items dialog box, the remote site's database is automatically updated with the updated invoice item information from Central. The Invoice Item Update Reports dialog box appears so you can print invoice item reports as necessary. The Login dialog box then appears as usual.

Updating Invoice Item Information

When you process End of Day in Cornerstone, a message appears if invoice item files exist that need to be updated.

To Update Invoice Items

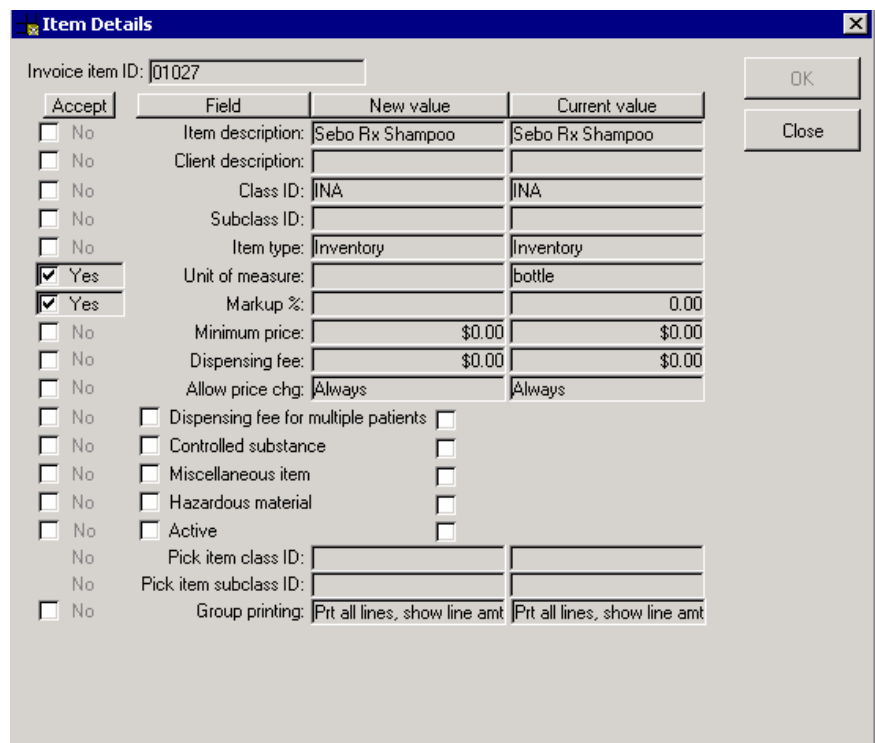
- 1 On the **Activities** menu, select **Update Invoice Items** or click the **Update** toolbar button.
- 2 A message box appears informing you that files are being imported.
If no updates have been received, a message appears to inform you that no update files from the central server exist. Click **OK**.
- 3 If there are items to be updated, the Update Invoice Items dialog box appears.



Update Invoice Items dialog box

- 4 To accept all of the changes, click **OK**.
If you do not want an item to be modified, click the Modify check mark. The check mark disappears and the item will not be modified.
- 5 To view a specific item's changes or accept individual changes to an item, click **Details**. The Item Details dialog appears.

The Item Details dialog box displays specific changes to an invoice item. You can choose to accept each change individually.

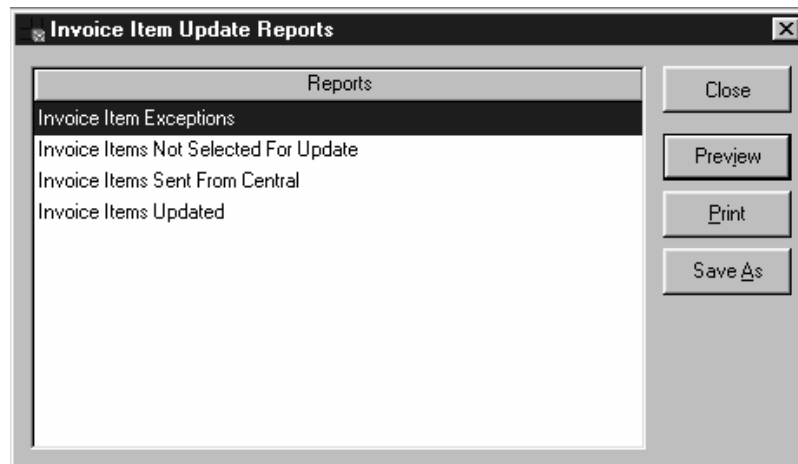


Item Details dialog box

- 6 The remote site's invoice item information that differs from the central site's information is highlighted in aqua.
- 7 Click **OK** to accept the individual item's changes, or if you do not want to accept a change, click the **Yes** check box to change accept to **No**.
- 8 To continue accepting individual item changes, repeat steps **5 - 8**, or click **OK**. The Update Invoice Item Reports dialog box appears. See "Generating Invoice Item Update Reports."

Generating Invoice Item Update Reports

After you have updated invoice items, the Invoice Item Update Reports dialog box appears. You must print these reports at this time; you **cannot** retrieve these reports at a later time.



Invoice Item Update Reports dialog box

Previewing and Printing Reports

To Preview a Report

The top of the Report Preview displays the total amount of records in the report, the number of records selected (either all or a range), and the number of records read. It also displays the number of pages in the report and the current page displayed.

- 1 In the Update Invoice Item Reports dialog box, select the report to generate.
- 2 Click **Preview**. The Reports Preview appears.
- 3 When you are finished viewing the report, click **Close**.
- 4 Repeat steps **1 - 3** to preview additional reports or click **Close** to exit.

To Print a Report

- 1 In the Update Invoice Item Reports dialog box, select the report to generate.
- 2 Click **Print**.
- 3 Make any changes, if necessary. (We recommend that you do **not** change the default settings. Use **Save to a File** to save a report as a text file.)
- 4 Click **OK** to print the report.
- 5 Repeat steps **1 - 4** to print additional reports or click **Close**.

To Save a Report to a File

Use this option if you want to import the data into another program (such as a spreadsheet or word processing program). Among other file formats, you can save the report in a **.doc** format (for Word) or a **.txt** format (for general applications).

- 1 In the Update Invoice Item Reports dialog box, select the report to generate.
- 2 Click **Save As**. The Save As dialog box appears.
- 3 Select the **Folder** to save to and type a file name. The file saves as a **.txt** (text) file unless you type a different extension (such as **.doc**) after the file name.
- 4 Click **OK** to save the report in the specified folder.
- 5 Repeat steps **1 - 4** to save additional reports to files or click **Close** to exit.

Cornerstone Remote Reports

The following reports are included in Cornerstone Remote software.

Invoice Items Exception Report

Includes the class ID of invoice items that do not match between the central site and remote site. You will need to modify the invoice item information for these items in the Cornerstone database.

Invoice Items Not Selected for Update

Includes items that have been deselected for modification.

Invoice Items Sent from Central

Includes every item that had modifications sent from the central server.

Invoice Items Updated

Includes the invoice items that were updated.

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