Working with a Cornerstone Multi-Location/Single Database system

If your Cornerstone* Software and database are shared by multiple practice locations, follow the steps below to:

- Add practice(s) and designate one as the primary practice. .
- Assign a default practice to staff or to a workstation.
- Assign clients to a home practice.

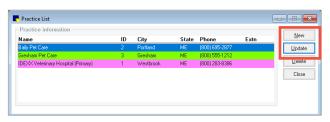
- Create cashier IDs and revenue centers per practice.
- Add and designate appointment suites.

You'll find a list of Multi-Location/Single Database (MLSD) reports at the end of this document.

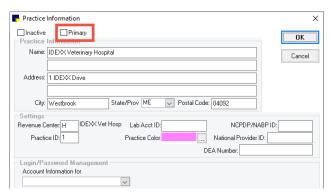
Adding a practice and designating the primary practice

Use the Practice List to manage practices associated with your database. One active practice must be marked as primary. Its name and contact information will be listed on all client communications with Pet Health Network* Pro.

Go to Lists>Practice, and then click New or Update. 1.



Select the **Primary** check box. **Note:** The Primary 2. practice cannot be inactivated until another practice is designated as Primary.



Enter or update the practice information. З. Tip: Next to the Practice Color box, click the three dots (...) to choose a color. The practice and staff member names will appear in that color in the lower right corner of the screen.

IDEXX Veterinary Hospital - 1 User: Michelle Campoli, CVT, CVPM

Assigning a default practice

A default practice can be assigned either to a staff ID or to a workstation. Cornerstone first looks for a default practice for the logged-in workstation; if none exists, it uses the default practice for the staff. If both exist, the workstation default is used. If both are absent, the primary practice is used.

To assign a default practice to a staff ID:

- 1. Go to Controls>Defaults>Staff.
- 2. Select the **Miscellaneous** tab.
- Select the default practice for this staff ID. З.

Staff Defau	ults Michelle H. Campo				
Patient Clipbo		Miscellaneous	Inventory	My Favorites	
	Default practice:	Gresham Pet Care	- 3	ł	~
	Login page:	<none></none>		~	
	Revenue center	G Gresha	m Pet Care		
	A	GPC Schedule			

4. Click **Save** to add a default practice for another Staff ID, or click OK to save changes and close.

To assign a default practice to a workstation:

- 1. Go to Controls>Defaults>Practice and Workstation.
- On the left, select Workstation>Workstation-All 2.
- З. In the Default Practice list. select the default practice for this workstation and click OK. Tip: To log in to a different practice, a staff member with appropriate

Practice and Workstatie	on Defaults		
Daily Planner	Workstation-All (RENA-SS0LHP12)	0.0	
Estimate IDEXX VetLab Setting Imaging Inventory	Default Practice IDDX Veterinary Hospital - 1	×	
Invoice Invoice Item	Location Group: Cinic Nain-WH Loc ID Location	~	
Non Messages Passwords Patient Performance Tracker Petry Plans Physical Exam Practice Prescriptions Purging	RX Phenocy IVI		
Referrals Report Language Required Data Statement Print Optior Toolber Unattended EOP Vaccinution Boolemarks Vaccine Tog Web Links Whiteboord			Dist
-Workstation-All		Acoly	OK Cano

security privileges can select File>Switch Logged In Practice.

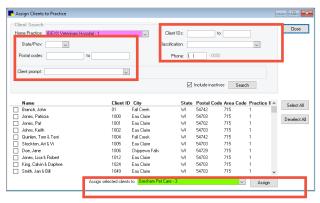
4. Click OK.

Assigning clients to a home practice

Each client must be assigned to a home practice. When you generate an Accounts Receivable report, you'll find the client's name on the accounts receivable list for the home practice only; however, the client's balance will be the total outstanding balance from all practices.

You can assign multiple clients to a home practice at one time.

- 1. Go to Tools>Assign Clients to Practice.
- 2. Enter search criteria to find the group of clients (for example, enter a range of postal codes), and then click **Search**. A list of clients is displayed.
- 3. To the right of the Client List, click **Select All** or select the check boxes for each client you want to include.



- 4. In the **Assign selected clients to** drop-down list, select the new home practice for the clients, and then click **Assign**.
- 5. Click Close.

Creating or updating cashier IDs

If a staff member works at more than one location, create a separate cashier ID for that person at each location.

- 1. Go to Lists>Cashier ID, and then click New or Update.
- 2. When prompted, enter an administrator user name and password.
- 3. Enter the cashier information, including a cashier ID, user name, and password, and then click **OK**.

Cashier ID Information		
Cashier ID:	Status: Active	OK
Cashier name:		Close
Password:		
Confirm password:		

Tips:

- Each cashier ID must have a unique password.
- If a staff member works at multiple practices, create a cashier ID for each location with consistent naming, for example the practice ID followed by initials (1RT, 2RT, 3RT). This will improve the display of cashier IDs or ID ranges on reports.

Cashier Name	Cashier ID	\mathbf{A}	New
Cornerstone IVH	1CS		Hem
Kate-APC	2KW		<u>U</u> pdate
Kate-IVH	1KW		
Lisa	1LL		<u>D</u> elete
M Campoli-APC	2MC		Select
M Campoli-IVH	1MC		201000
Sue B-APC	2SB		Close

Sales tax by practice

If your practice locations use different sales tax rates, the sales tax can be applied based on the logged-in practice.

- 1. Go to **Controls>Taxes**, and then click **New** or **Update**.
- 2. Enter or modify the description, percentage, GL account, and practice information accordingly.

	ion	OK
Description	: Sales Tax - Portland	
Percentage:	Cance	
GL Account	: 9090]
Status		
Active 💿	Inactive 🔘	
Practice Info	10 million (1997)	
THUCAUGE HITC	ormation	
	e(s): 1-IDEXX Veterinary Hospital (Primary)	
	e(s): 1-IDEXX Veterinary Hospital (Primary) 2-Baily Pet Care	
Apply to Practic	e(s): 1-IDEXX Veterinary Hospital (Primary)	
Apply to Practic	e(s): 1-IDEXX Veterinary Hospital (Primary) 2-Baily Pet Care	
Apply to Practic	e(s): 1-IDEXX Veterinary Hospital (Primary) 2-Baily Pet Care	
Apply to Practic	e(s): 1-IDEXX Veterinary Hospital (Primary) 2-Baily Pet Care	

- 3. Click **OK**. Repeat as needed for each tax and practice.
- To apply taxes to each invoice item, go to the Lists>Invoice item>Tax/Disc tab; to apply taxes to all items, go to Tools>Mass Markup. (Note: You can use Mass Markup only when no one else is logged in and no other instances of Cornerstone are running).

For more details, press **F1** or refer to *Reconfiguring Taxable Items*.

Creating or updating revenue centers

Assigning a revenue center to each practice enhances practice-specific reporting by separating sales, taxes (including different tax rates), and discounts. (Line item discounts are reported by revenue center on the end of period summary reports only.).

1. Go to Lists>Revenue Centers, and then click New or Update.

Revenue Center	Revenue I		New
Baily Pet Care		Baily Pet Care - 2	<u>N</u> ew
Gresham Pet Care	G	Gresham Pet Care - 3	Update
DEXX Vet Hosp	Н	IDEXX Veterinary Hospital - 1	Update
			Delete
			Select
			Close

2. Enter a revenue center description and ID. Each ID must be unique among all the practices sharing the database.

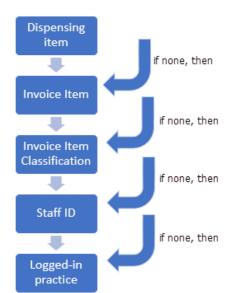
Revenue Center Information for IDEXX Vet Hosp	- • •
Revenue Center: IDEX: Vet Hosp	OK
ID: H	Cancel
Practice: IDEXX Veterinary Hospital - 1	~

3. Select the practice name to associate with this revenue center, and then click **OK**.

Determining revenue centers

A revenue center is required for each item for an invoice, patient visit list, estimate, prescription label, diagnostic request, or appointment item.

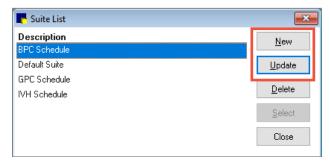
Based on your practice's MLSD configuration and practice type, revenue centers can be assigned at the item, classification, or staff level.



Creating appointment suites

You can create an appointment suite per practice to group practice-specific rooms in the Appointment Scheduler.

1. Go to Controls>Appointment Scheduler>Suite Setup, and then click New or Update.



2. Enter or modify the description, the number of columns to display on the grid, the rooms to display, and the order of rooms, accordingly.

Suite description: BPC Schedule		ОК
Columns on grid: 04	●6 ○8 ○12 ○16	Cancel
Room	Display	
Dr. Carson BPC	\checkmark	
Dr Schulze BPC	\checkmark	
Walk Ins BPC	\checkmark	
Admits BPC	\checkmark	~
Technician BPC	\checkmark	
Dr. Schulze IVH		
Admits IVH		\sim
Technician IVH		
Dr. Jones IVH		
Dr. Jones GPC		
Dr Carson GPC		
Walk Ins GPC		
Walk Ins IVH		
Technician GPC		

3. Click **OK**. Repeat as needed for each appointment suite.

Designating appointment suites

An appointment suite can be applied based on logged-in staff. Cornerstone looks first for the staff default setting; if none exists, the Appointment Scheduler default is used. If neither are found, the default suite is applied.

To assign a default appointment suite to a staff ID:

- 1. Go to Controls>Defaults>Staff.
- 2. Select the Miscellaneous tab.
- 3. Select the appointment suite for this staff ID.
- 4. Click **Save** to add an appointment suite for another staff ID, or click **OK** to save changes and close.

Ī	🗧 Staff Def	aults							
	Staff MC	Michell	e H. Campo	II, CVT, CVPM					
	Patient Clipt	ooard	Toolbar	Miscellaneous	Inventory	My Favorites			
		Defa	ult practice:	Gresham Pet Care	-3		~		
		l	.ogin page:	<none></none>		\sim			
		Reve	enue center:	G Gresha	m Pet Care				
		Appoin	tment suite:	GPC Schedule			~		

To assign a default appointment suite for all practices:

- 1. Go to Controls>Defaults>Practice and Workstation.
- 2. On the left, select Appointment Scheduler.
- In the Appointment suite list, select the default appointment suite for the Appointment Scheduler and click OK.

Account	~ /	ppointment Schedule	r		
Alerts		General			
- API Integrations		Appointme	nt Scheduler screen ref	resh rate (in seconds): 60	
 Appointment Schedule Holidays - Appointr 		🗹 Display	appointment detail	Turn off scheduler resizing for this workstation	
-Hours - Appointmer		Prefix	required	Always add deletions to tickler file	
Boarding		Show.	appointment time on the		
Check-in Client		Appointme		×	
- Daily Entries Report			BPC Schedule		
- Daily Planner		Next Appointment F	emined Default Suite		
Documents		🗹 Display	next gGPC Schedule		
- End Of Period		🗹 Only di	oplay IVH Schedule		
Estimate		Item ID			
- IDEXX VetLab Settings		2315			
- Imaging		2335	EXAMINATION V		

Multi-Location/Single Database reports

Reports that display data by practice, which typically include client information, accounts receivable, or payments:

- Daily Payment Register By Practice
- New Client Report By Practice
- Daily Summary Report By Practice⁺
- Monthly Sales Summary By Practice[†]
- Yearly Sales Summary By Practice[†]
- Accounts Receivable Report By Practice
- Monthly Invoices and Statement
- Client/Patient Report Builder
- Census
- Client Account History

¹Summary reports use a combination of client home practice, logged in practice, and revenue center.

Reports that display data by revenue center, which typically include sales information:

- Itemized Audit Trail for Revenue Center
- Serv. and Inv. Sales by Revenue Center
- YTD Net Sales by Center
- Sales Tax Summary By Revenue Center
- Cost of Goods Sold by Center
- Referral Revenue Report by Rev Center
- Referral Summary by Revenue Center

For more information about using a Cornerstone Multi-Location/Single Database configuration, call a Cornerstone Support Representative at **1-800-695-2877**.

