Setup Custom Search to Fetch Reviews Cornerstone



To create a new Fetch Reviews Search Criteria in Cornerstone:

- Click Reports
- Then Client and Patient Report Builder



Click the **New** button on the right

F Cornerstone							-	-	-	-	-	-	-
<u>File Edit Activities List</u>	ts <u>C</u> ontrols	Inventory	<u>T</u> ools	<u>R</u> eports	Web Link <u>s</u>	<u>W</u> indow	<u>H</u> elp						
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Add the following criteria:

- Report Name: Fetch Reviews
- List results in order of: Client ID
- Select Show clients only
- Change the Last invoice date to cover dates you wish to Fetch Reviews for
 - We recommend daily or weekly
 - If daily, both dates will be current date
 - If weekly, choose 7 days prior and the current date

Click Save button when complete

Your search will now be added as **Fetch Reviews** and you are now ready to run a report and Fetch Reviews! View the **Create Recent File** directions on how to run a new search.