Cornerstone 9.1 Software

Computer hardware and software requirements

- For workstations and peer-to-peer servers, we recommend a computer that:
  - Is less than 5 years old.
  - For optimal performance has at least:
    - 8 GB of memory (for workstations)
    - 16 GB of memory (for peer-to-peer servers)
  - Is running **at least** Windows* 7 Professional **or later** operating system with Internet Explorer* **version 10 or later** recommended. For VetConnect* PLUS results, Internet Explorer* **version 9 or later** is required.

    IMPORTANT: Cornerstone* Software does not support Windows* operating systems that are no longer supported by Microsoft, including Windows Server* 2003, Windows* XP, Windows* Vista, and, as of January 14, 2020, Windows* 7, Windows* Server 2008, and Windows Server* 2008 R2.

- For more detailed hardware and operating system information, including details on dedicated servers and thin-client workstations, see the *Hardware and Operating System Guidelines*.

- To use internet-based services in the Cornerstone Software (such as IDEXX Reference Laboratories request forms, VetConnect PLUS, etc.) the server and the workstations used to access the services must be connected to the internet.

- IDEXX Diagnostic Imaging users: The Cornerstone software requires Microsoft .NET Framework 4.0 or later on the server and on all workstations to support the Image Request and Results feature. You will be notified at the end of the Cornerstone installation if .NET 4.0 or later is not found.

- If you have skipped any previous upgrades, be sure to review the release notes for those upgrades, so you know about all the new features and enhancements from those upgrades that have been incorporated into Cornerstone 9.1.

What's new

To learn more about the new features and enhancements in Cornerstone 9.1:

1. After you upgrade, press **F1** or click the **Help** button on the toolbar.
2. If any windows are open in Cornerstone, click **Getting Started** on the Contents tab. The Welcome topic describes all the new features, with links to more details.

Security and default settings

There are two new default settings in the Cornerstone Software 9.1 release. There are no new security settings.

Welcome to the new face of Cornerstone Software!

We've modernized the most frequently accessed areas of Cornerstone so you can find information more quickly and streamline tasks you perform dozens of times a day—updated areas include the Appointment Scheduler, Patient Clipboard*, Patient Visit List, Daily Planner, Whiteboard, Check In, and Estimates.

Appointment Scheduler

The Appointment Scheduler has a new look and improved functionality, including:

- The Time column is now displayed on both the left and right side of the Appointment Scheduler window.

- Scheduling templates now appear in the room column(s) with a lighter variant of the color used for the reason for visit; they are also displayed more intuitively to the left of the Room column (**Controls > Appointment Scheduler > Template Designs**).

- Designated staff time per appointment is indicated with a new icon that appears in the far right Scheduling Status column when staff time is indicated on an appointment. It appears in gray, yellow, or red. Hover your mouse pointer

over the icon to see if staff presence is required or if staff are double booked or overbooked. In the Display Staff view, the icon also appears to the left of the appointment.

- Scheduled slots are displayed with the reason-for-visit color in the first time slot and bold font to indicate where the appointment time begins. Additional scheduled time slots use a slightly lighter version of the color, as well as a bullet for any slots not displaying appointment details (**Controls > Appointment Scheduler > Reasons for Visit**).

- Appointment block colors are now configurable. You can select a different block or lunch color under: **Controls > Defaults > Practice & Workstation > Appointment Scheduler > Hours – Appointment**.

- The appointment grid layout has been updated with darker time-slot lines at the beginning of each hour and half hour, and the lines are more distinct per time slot, replacing the option for manually darkened grid lines.

- We have improved the appointment and block details that appear when you hover the mouse:
  - When hovering over a scheduled appointment, details for the appointment time, patient/client information, appointment notes, and confirmed status are displayed with corresponding icons.
  - When hovering over an appointment block, the block end time and reason (block note) are displayed.

- A new **Refresh** button is now available. The button will update the screen with any new appointment information while maintaining any manually applied filters.

- Confirmed appointments are now indicated with a check mark to the left of the client name vs. asterisks around the name.
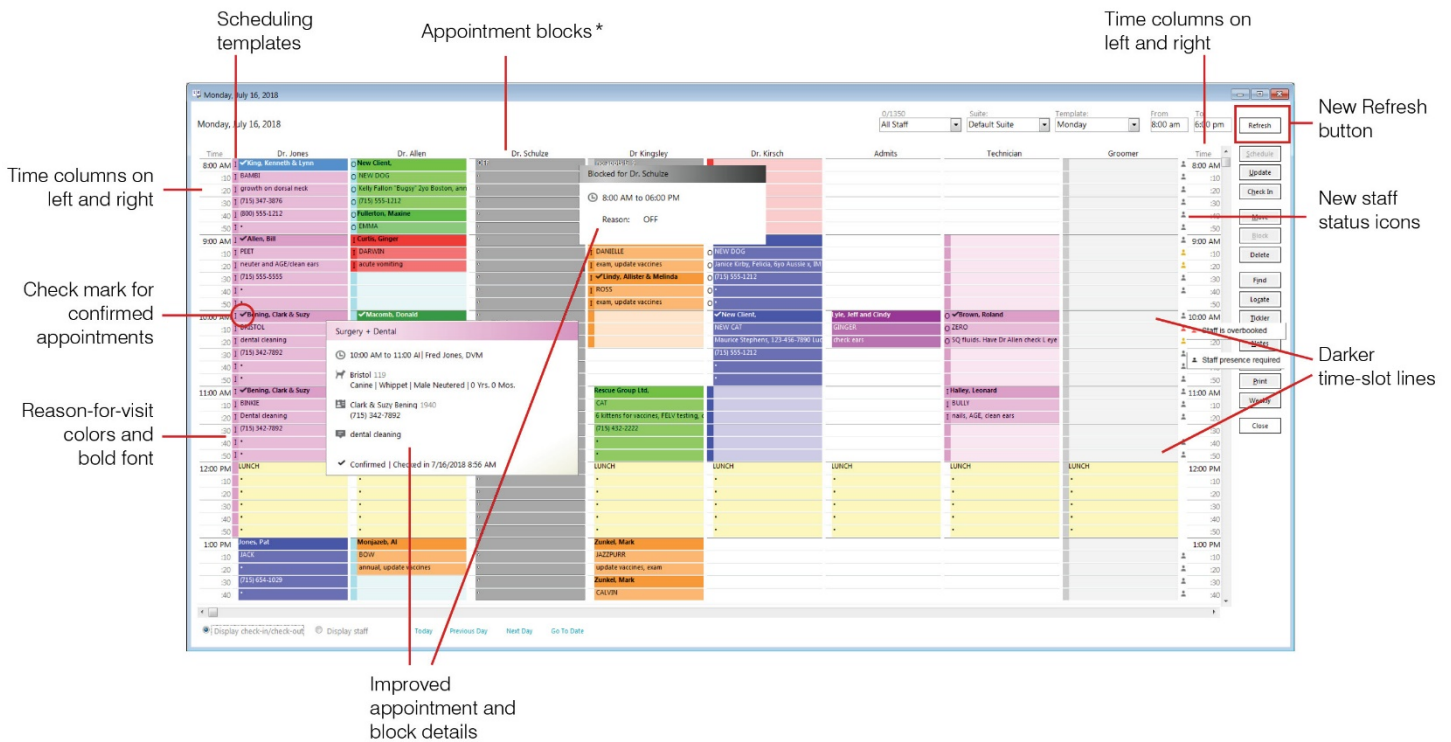

*Now a configurable option

Search clients and patients

We improved the client and patient search experience with a new search tool. Not only does it have the ability to search patients by breed, it is a single search window that can be accessed from the toolbar 🔍. The window has client and patient search tabs and uses the same search and sort criteria you are used to.

Additionally, search results are displayed as client/patient cards that display more detailed information. The cards better differentiate similar clients/patients, provide alerts, and show client and patient associations. There are right-click menus, as well, to direct you to primary task windows, such as Invoice, Appointment Scheduler, Patient Clipboard, Estimate, and Medical Notes. Be sure to press **F1** to see all the details about this new tool.
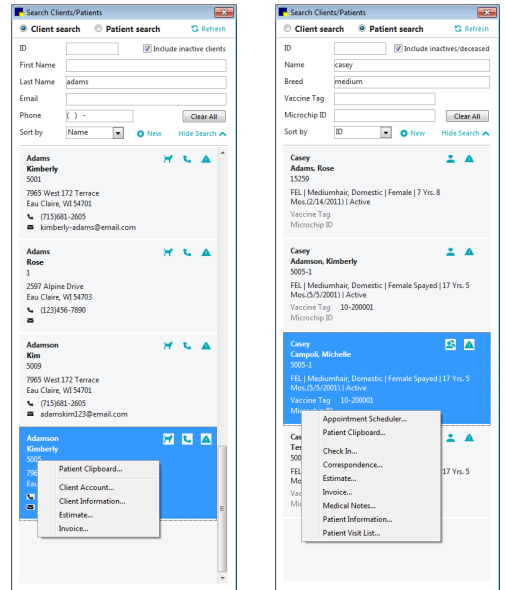
Patient Clipboard

Patient Clipboard, the main navigation window in Cornerstone, has an updated look, while retaining the same basic layout and functionality. Improvements include:

- Fonts are larger for client and patient names and IDs
- Inactive clients appear in red with an (I) after the name.
- Inactive or deceased patients appear in red with an (I) or (D) after the name.
- The expand-list option is improved for clients with multiple patients—inactive/deceased patients are displayed in darker grey with a corresponding (I) or (D).
- Updated information and patient history icons.
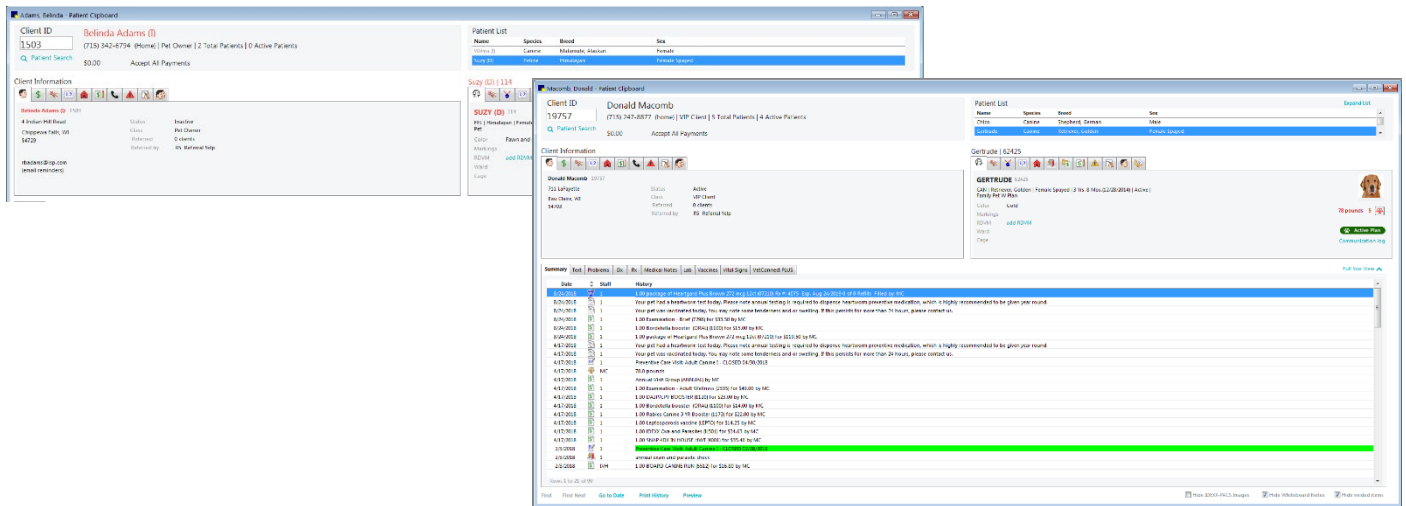
## Improved favorite-document access

You now have a faster way to start your designated favorite documents for a patient. The Patient Clipboard patient right-click menu has new submenus for Medical Notes and Correspondence that can display up to ten favorite documents alphabetically. Just select one, enter the responsible party staff ID, and you are up and running with fewer clicks and less searching. The submenu also has an **all correspondence** or **all medical notes** option to access all your document templates.

This new feature is already active if you have set up favorite documents. To adjust or set up your favorite document settings, go to **Controls > Defaults > Staff > Favorites** or **Controls > Defaults > Practice and Workstation > Documents > Favorite Documents.**

Tip: Only enhanced-style templates can be set as favorites (not classic-style medical note templates).

You can also review the new default setting to add the submenus under **Controls > Defaults > Practice and Workstation > Documents.**

Note: If you have set up both staff and practice favorites, staff favorites will be displayed in the submenu (based on the logged in user staff). Refer to **F1 help** for more information.
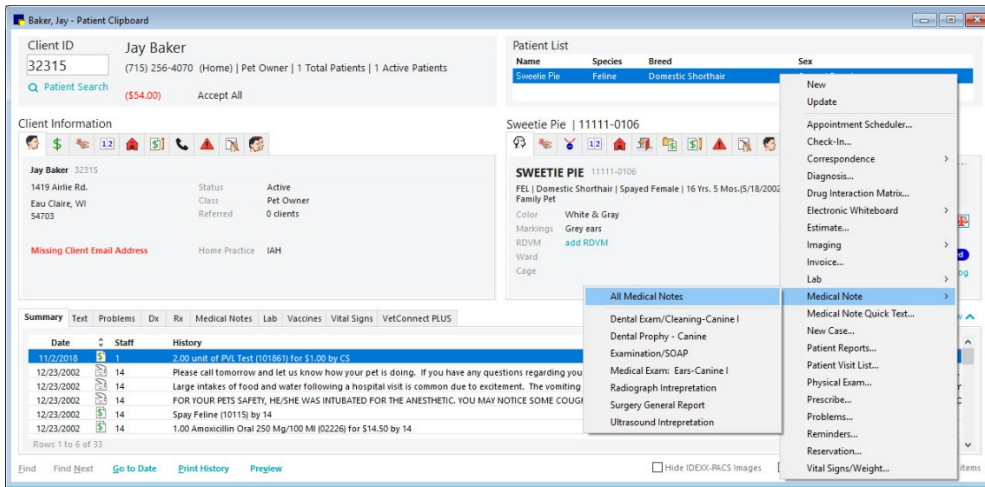
Help and Web Links menu updates

Get help quickly when working in Cornerstone by accessing the updated **Help** menu containing links to CornerstoneHelp.com, the IDEXX Learning Center, support chat, remote sessions, and F1 search.

IDEXX sites and related applications can be quickly accessed from the **Web Links** menu. Whether logging in to your subscription account for Pet Health Network Pro, placing an IDEXX order online, looking for information on Petly Plans or rVetLink, or checking on your telemedicine consult results, get there quickly without needing to bookmark pages on your external browser. Selections from the Web Links menu will open web pages using your default browser as well.
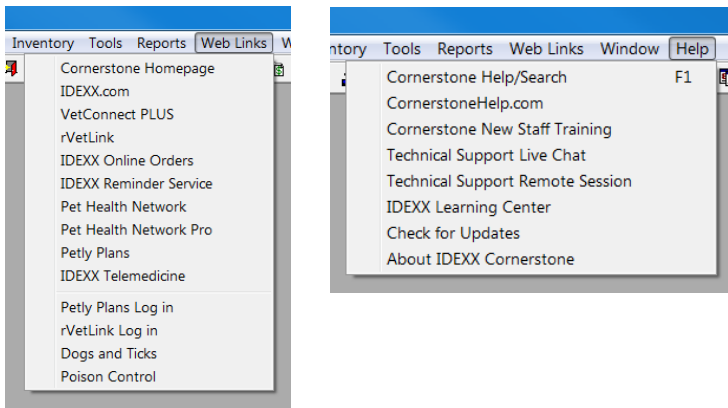
General enhancements and improvements

Email and faxing

- When emailing an estimate, invoice, image, order, or patient history, system settings are applied in cases where specific user settings previously entered were deleted.
- A valid staff ID is required to send email; characters entered into the staff selection drop-down box will no longer be used if there is not a valid staff ID.
- When faxing/emailing invoices or estimates, the check for unsupported file types now checks for empty PDF attachments. If an invalid file type or a PDF of <2 KB is found, a message appears, and the attachment is removed.
- To reduce the chance of a conflict with IDEXX fax service availability, faxes will be batched in smaller increments to ensure that there is no disruption to faxing from the Cornerstone software.

Estimates

- Electronically signed estimates will not be finalized if the signed PDF file is not created properly, and a message will be displayed. Once the issue is resolved, the estimate can be re-signed or manually finalized without a signature.

Medical notes and correspondence (documents)

- Unused vital sign, diagnosis, or problem patient history links from auto-finalized medical notes/correspondence are no longer visible when you view the document.
- Fixed an issue that caused error 15 on documents when the last question bookmark within a table was left blank.
- Improved the F1 help content related to document bookmarks accessed from document setup and use windows.
- Updated medical illustrations are now available in the Medical Illustrations subfolder under the Imaging folder. (replacing previously provided versions to correct file size).
- Importing a non-DICOM* image into a medical note using the imaging bookmark no longer causes Cornerstone to freeze.
- The Patient Picture bookmark will now populate without error when the pet picture was originally captured from a phone's digital camera images (DCIM) folder.
- When you use the right-click menu to finalize a document from the Daily Planner Medical Notes or Correspondence tabs, you will be notified if the document is open on another workstation.
- Resolved error on Quick Text Medical Notes that occurred when the Hx Description was too long to be displayed.

Inventory

Inventory items

- New item IDs created from inventory search windows will have lower-case characters converted to upper-case characters to prevent problems that can occur if a lower-case item ID is added to an inventory receipt.
- Item history will be correctly displayed for items without a valid unit of measure.
- Resolved a Java error on inventory windows when an invoice item was changed from inventory to service type.
- When receiving a lot or expiration tracking item with multiple lot numbers or expiration dates, the View Quantity on Hand window correctly displays the item's quantity for each lot number/expiration date.
- Inventory tracking item quantities that are on a PVL or below their reorder quantity will be displayed with the correct decimal format on the Purchasing Worklist.
- Saved invoices with items that do not have verified inventory details will remain open and will not close automatically with end of month processing.
- In cases where inventory is received against a negative QOH, discrepancies have been corrected related to total cost reporting and on-hand average cost calculation.

Purchase Orders

- It now takes less time to move items from the Purchasing Worklist to a Purchase Order for an online vendor, as well as to work with an offline vendor purchase order with a large number of items (>35).
- Fixed an issue that in certain cases when closing a partial order could create a negative quantity on order for items not yet received.
- For integrated ordering (SmartOrder* inventory solution), the correct per-item costs are now retained when the purchase order is refreshed (i.e., when saved and reopened).
- Clicking the **Remove From Order** button in the Create Purchase Order window with a single item selected no longer removes multiple items if noninventory tracking items are included and transferred from the Purchasing Work List.

Inventory receipts

- When pressing Tab from a manually entered item ID field in SmartOrder inventory receipts, the cursor now correctly moves to the next field in the same line.
- Pressing Tab now works correctly in the Receipt Item Detail window when multiple lines are present for both detail tracking and non-detail tracking items.
- When the Receive Purchase Order window opens, items are now sorted in original purchase order sequence.
- Total tax amounts of >$999.99 can be entered on inventory receipts and will also be displayed correctly on the inventory receipt report.
- Resolved an application error that occurred when saving a receipt with a blank tax field.
- When an order is received, the Shipping field will no longer display a **must be a valid decimal** message when a negative value is entered.
- (AUS) During receipt import, if an invoice item does not have a default location, the message will display the invoice item information.
- (AUS) GST will be included for recalculating the markup percentage/margin value when you manually change a price in the Change Prices window.
- A confirmation window will appear when you manually decrease the markup or price in the Change Prices window.
- Hovering over items in the **Enter receipt item details** window from a saved inventory receipt no longer displays non-lot/expiration date tracking items in red.

Inventory reports

- The Inventory Receipt report sorted by Location by Receipt has been modified to display received quantities per location only (multi-location inventory only).
- Unit of measure names that have names in all caps are now displayed correctly on the Inventory Audit report.
- The Inventory Audit report now displays and sums multiple lines of an item's consumption correctly when the lines of the same quantity have the same verified inventory details on a patient invoice.

Laboratory

- With improved IDEXX Reference Laboratories communication, an updated message is now displayed to confirm you want to cancel a test if you delete a pending request. Samples en route will not be processed. When the samples are scanned at the laboratory, you will be notified to call the laboratory to cancel the test.
- Result matching criteria have been improved for IDEXX Reference Laboratories results when duplicate requisition IDs occur. When patient/client information does not match that of the requisition, an orphan result will be returned.
- There is now less likelihood of receiving duplicate or Not Requested results in the IDEXX VetLab* Station queue if the server connection is lost and then reestablished.
- Updated the IDEXX Reference Laboratories file import to reduce interruptions to importing results.
- New IDEXX in-house test profiles are now available for SDMA/TT4. The previously released SDMA test profiles have been modified to improve visibility on the IDEXX VetLab Station.
- Improved Cornerstone response time when submitting in-clinic lab requests.
- A new Progesterone profile is available for in-clinic testing.
- Improved the connection between Cornerstone and the IDEXX VetLab Station.
- Updated the download tool for IDEXX Reference Laboratories to prevent the service from stopping unexpectedly.

Mobile computing

- In cases where the same reminder already exists on the patient as a letter reminder, callbacks are now properly retained on mobile synchronization.
- Java errors have been resolved related to the reading of the client invoice table during mobile synchronization.
- Fixed synchronization issue when an image request with a shot tree selection was made on the mobile workstation.

Patient Clipboard*

- The patient picture is no longer missing when you switch to full view of the Patient Clipboard and then return to normal view.
- Improved the loading time of the Patient Clipboard for IDEXX Web PACS enabled workstations.
- To prevent errors when accessing PDFs from the preview screen on the Patient Clipboard, Cornerstone now attempts to access the document up to three times before displaying an error.

Petly* Plans

- The synchronization interval between the Cornerstone software and Petly Plans has been improved to ensure that information is updated on a daily basis.
- Updated the number of plans stored in cache to reduce memory errors.
- When you maximize the Estimate window, the Petly Plans discount button will resize correctly.

Reports

- Statistics by Staff and Species reports correctly reflect dollar values when a past period invoice is voided and an updated invoice is posted for a different amount than the voided total.
- Monthly Staff Commission report figures are now summed prior to the report opening.
- The "confirmed by" staff ID will now appear on the Appointments Report and Appointments Report Summary when the reports are saved to file,
- Additional details on various report descriptions and report fields were added to the Report Search window.

Vital Signs

- When using the kilograms weight unit of measure, the *s* is now displayed correctly in windows where weight is displayed (e.g., Patient Clipboard).
- Right-clicking in a blank field or clicking beside a graph icon in the Vital Signs window no longer causes an error.

Other enhancements and improvements

- We have upgraded the Application Service to Tomcat version 9 to improve speed at start up and to reduce errors.
- Manually entered patient reminders now use a default date of 00/00/0000 instead of the date on the previous line.
- Controlled substance export now retains the dispensed decimal quantity up to 2 places, instead of rounding decimal quantities to a whole number.
- The staff name field on printed prescription labels is now left-justified, and the field length is increased if the license number is not selected for display. This change will better accommodate longer staff names.
- Unattended End of Period Service now skips noncritical steps that are hanging or that can't be completed, such as unable to create GL batch extract. Notification of these skipped processes will appear as a message on the UEOP designated workstation and in the audit file.
- Errors using lab functionality with the Whiteboard open have been resolved.
- Logged in users without security access for Imaging Email settings will receive an appropriate access denied message when accessing or attempting to edit image SMTP settings.
- All notes entered when processing multiple treatments will be displayed correctly when reviewing the entries in the Patient Treatments window.
- Pressing Ctrl-L or Ctrl-N on inventory or communication windows will no longer bring up browser-related windows.
- Transferring patient ownership is no longer allowed if the patient appears on an open invoice. A message alerts you when this is the case. This change helps to prevent unbalanced client accounts.
- Corrected an error that could occur when using the Change IDs tool to change item, client, or invoice item IDs and revert back to the original ID.

- Fixed a tabbing issue on the Patient Visit List window that occurred when using group codes that include prescriptions and updating quantity from a travel sheet.
- When using the Invoice Item **Setup Tool > Set Class** tab, changes to invoice items will no longer reset item pricing.
- Required client/patient data fields will perform correctly if auto-assign client/patient ID is turned off.
- Cornerstone will now allow rVetLink attachments without extensions.
- Added client address to information sent through HL7 transmissions.
- Removed redundant special action pop-up on invoicing. This will also reduce errors associated with special actions.

Strengthen **the bonds.**™

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