Cornerstone 9.3 Software

On-premises and cloud-specific information is denoted by these corresponding icons: ⬛, ☁.

Computer hardware and software requirements

- For workstations and dedicated or 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 dedicated and peer-to-peer servers)
  - Is running at least Windows* 10 Professional or later operating system.
    IMPORTANT:
    - o Cornerstone* Software **does not support** Windows* operating systems that are no longer supported by Microsoft*, including Windows Server* 2003, Windows* XP, Windows* Vista, Windows* 7, Windows* Server 2008, and Windows Server* 2008 R2.
    - o IDEXX Diagnostic Imaging is offering security support of Windows 7 image-capture PCs for IDEXXCare Plus customers through December 31, 2022. If you are currently using Windows 7 on your image-capture PC, upgrade options to Windows 10 are available. For more information, contact IDEXX Diagnostic Imaging Support at **1-877-433-9948**.
- We recommend a monitor screen resolution setting of 1280 x 1024 or higher; settings less than 1024 x 768 are not recommended. For additional recommended Windows 10 settings, please see *Windows 10 IDEXX Required and Recommended Settings.*
- ☁ Internet access is required for both browser and application use.
- ⬛ To use internet-based services (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.
- ☁⬛ For more detailed hardware and operating system information, including details on Cornerstone Cloud devices and on-premises Cornerstone dedicated servers and thin-client workstations, see the *Hardware and Operating System Guidelines*.
- ⬛ IDEXX Diagnostic Imaging users: Microsoft* .NET Framework 4.0 or later is required 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 previous features and enhancements that have been incorporated into Cornerstone 9.3.

What's new

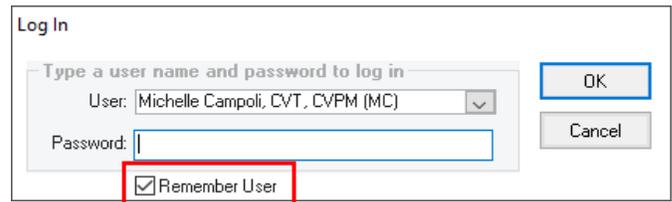To learn more about the new features and enhancements in Cornerstone 9.3:
1. After you upgrade, press **F1** or click the **Help** ❓ button on the toolbar.
2. If any windows are open in Cornerstone, click **Getting Started** on the Contents tab. The Welcome topic describes all the new features, with links to more details.

Important notice—change to login procedure

To protect your practice data, passwords are now stored more securely, so they can't be deciphered by someone inside or outside the practice. Once you upgrade to Cornerstone 9.3, your users must enter both a staff ID/name **and** a password when they log in to Cornerstone. We created a customizable team communication for you.

You can still use nonspecific logins (such as *front desk* or *staff*). A staff person can select the generic name from the **User** drop-down list or enter the generic staff ID and then enter the password.

Tip: Selecting **Remember User** will retain the name of the currently logged in user and display it the next time someone logs in at the workstation, effectively re-creating password-only login. **Note:** Time Clock and Practice Explorer will always require both a user ID/name and a password (there is no **Remember User** option).

If a user switches from a generic to a specific login, they should remember that associated default settings (**Controls>Defaults>Staff**) and security access (**File>Security Setup**) may be different with the specific login. An administrator is required for security settings.

Staff-specific settings are available for: Patient Clipboard* tab order, toolbar display, logged-in practice (MLSD only), login page, default appointment suite, inventory depletion (MLSD only), and favorite documents (which can impact document submenus on the Patient Clipboard, if using).

Note: If both staff and workstation settings are in place:

- Default appointment suite, toolbar, and favorite documents will use the logged-in staff settings
- Remember, only a Cornerstone administrator can create a new or reset an existing password. Support can assist in cases where the only administrator password is lost.
- Logged-in practice and inventory depletion will use the workstation settings

Security and default settings

There are new security settings:

- Dialog>**Delete Client**
- Reports>**Appointment – Today's Repor**t
- Reports>**EOD Inventory on Hand by Class, Item**
- Reports>**EOD Inventory on Hand Totals**
- Reports>**EOM Inventory on Hand by Class, Item**
- Reports>**EOM Inventory on Hand Totals**

There are new and updated default settings:

- **Email settings for Gmail** (Controls>Defaults>Settings>Email)
- **End of Period default reports** for new inventory on hand reports (End of Period: Controls>Defaults>Practice and Workstation>End of Period>Daily and Monthly reports)
- **Lab pricing option** (U.S. only) for IDEXX Reference Laboratories (Activities>Lab Work>Laboratories>IDEXX Reference Laboratory)
- **Print discount pricing per line** (Controls>Defaults>Practice and Workstation>Invoice)
- **Printer Assignments** (File>Printer Assignments)
  - o End of period Inventory on Hand reports>End of Day and End of Month printer groups
  - o Appointment – Today's Report>General Reports printer group
- **Number of copies to print** for either default or custom rabies certificates (Controls>Defaults>Practice and Workstation > Vaccine Tag)
- **Reason for visit referral recheck** (Controls>Reason for Visit)
- **Reminder date defaults** (Controls>Defaults>Practice and Workstation>Patient)
- **Report language** for additional rabies certificate labels for Vaccine, Brand, Manner of Administration, Type, Doctor Signature, and Drug Expiration (Controls>Defaults>Practice and Workstation>Report Language)
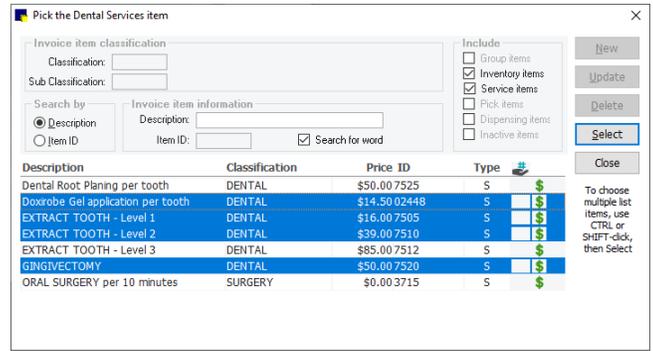
One setting has been deleted:

- The **password default setting** (Controls>Defaults>Practice and Workstation>Passwords) is no longer available. For enhanced security, you must now provide both a staff ID/name and a password when you log in.
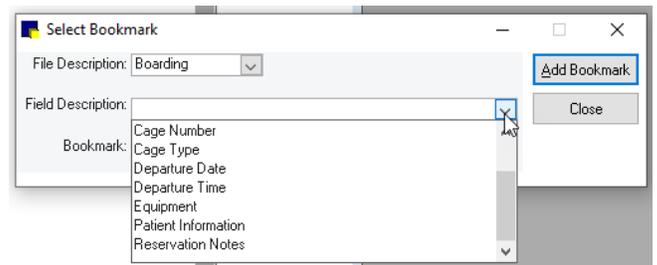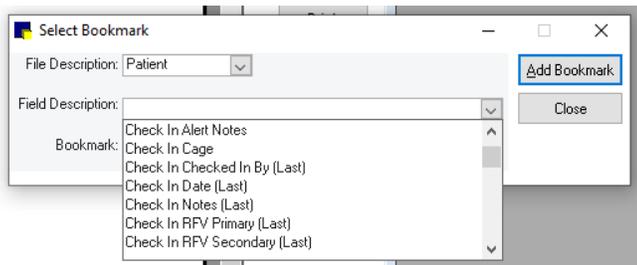
Featured Updates

Pick lists: A whole new approach

- We love pick lists, you love pick lists, everyone loves pick lists. And we just made them better by adding a multi-select function to the window: click 1, click 2, click 3, click however many items you want. Each selection will prompt you for any dispensing items, quantities (when using smart group functions), prescription labels, etc.
- Simplify your group codes and reduce clicks when using groups. Use the Invoice Group Item Setup report (under the Invoice Item report group) to see what groups use the same pick list more than once, and then simply remove them from the group(s). **Note**: Multi-select pick lists are not available on classic medical notes or Patient Advisor exams.

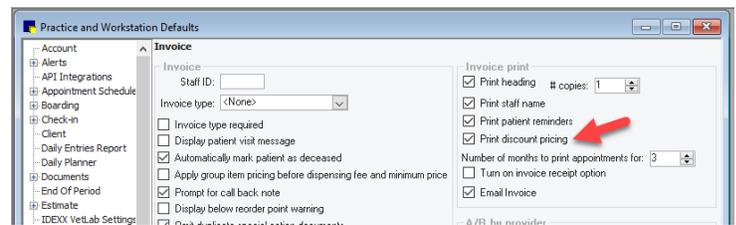## New document appointment and boarding bookmarks

Simplify your patient document entry with new document bookmarks for reason for visit, appointment notes, check-in, and next appointment details. We added vaccine brand for rabies and also added boarding bookmarks for equipment and reservation notes. The new bookmarks can be found under the **Patient** and **Boarding** file descriptions:

Discount details displayed on invoice

In response to your requests, we've added a new option to clearly show the extra value received on client invoices when discounts are applied! Update your invoice default settings to display the details, as shown below.

Note: We also added discount descriptions to estimates:

Item ID	Description	Staff Name	Low Qty.	Low Amount	High Qty.	High Amount
2321	Examination New Patient - Medical	Fred Jones, DVM	1.00	$60.00	1.00	$60.00
5550	Radiographs - First 2 Views		0.00	$0.00	1.00	$110.00
5555	Radiographs - ADD'L VIEWS		0.00	$0.00	2.00	$78.00
		Low Subtotal:		$60.00	High Subtotal:	$248.00
		Professional Discount:		($6.00)		($24.80)

For estimate, patient visit list (PVL), document, or boarding items, right click the amount field to see the calculation information.

New EOP reports for inventory on hand

If you track quantity and cost with Cornerstone inventory, you can now use end-of-day and end-of-month reporting to see the inventory on hand at the time of a specific period close. Reports are available at the item level (Inventory on Hand by Class, Item) or the classification level only (Inventory on Hand Totals).

Note: These reports are available only for periods that are processed (closed) after upgrading to Cornerstone 9.3.

Before using the reports, be sure to assign security access (from the File menu). We also recommend you evaluate and, if needed, update your printer assignments (File menu) and end-of-period report defaults (**Controls>Defaults>Practice and Workstation>End of Period**).

Updates to the default rabies certificate

We updated the Cornerstone rabies certificate based on your feedback. The new certificate provides improved display of brand, manner of administration, drug expiration date, type, and doctor signature line. Report language default settings are also available (**Controls>Defaults>Practice and Workstation>Report Language**).

For convenience, the number of copies to print setting now applies to **both** the default and designated custom certificate (**Controls>Defaults>Practice & Workstation>Vaccine Tag**).

Reminder date defaults

A new patient default setting lets you define the default due date when manually entering letter and call-back reminders. You can choose from none, current date, or previous-line date. The new setting is found under **Controls>Defaults>Practice and Workstation>Patient**.
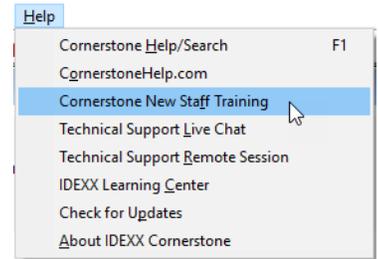

Boarding and Grooming updates

We made improvements for the display and navigation of the Boarding and Grooming module based on the top requests we received:

- Both the client and patient Boarding tabs on the Patient Clipboard now populate past reservations within the last 180 days.
- The patient list in the Reservation Information window now displays patients in status order (active patients followed by inactive/deceased patients). Inactive- and Deceased-status patients are displayed in a lighter grey font with the corresponding (I) or (D).
- You can now access the Patient Clipboard from the Boarding Reservations List window using the right-click menu.

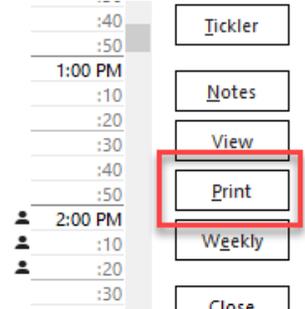## Help menu link to the updated Cornerstone New Staff Training

Onboarding your new team members is about to get easier. Check out the all new Cornerstone New Staff Training tool, located right in the Cornerstone Help menu. This complimentary learning tool is just two clicks away.

General enhancements and improvements

Appointment Scheduler

- You can now create a new appointment by searching for and selecting either a Patient ID or a Client ID. The corresponding information will be filled in automatically.
- The Today's Appointments report (accessed from the Print button on the Schedule for Today window) can now be assigned to a specific printer. Go to **File>Printer Assignment>General Reports>Appointment – Today's report** and select the printer.
Note: This report now requires security access for new users. Existing users with access to the Schedule for Today window will have access automatically.
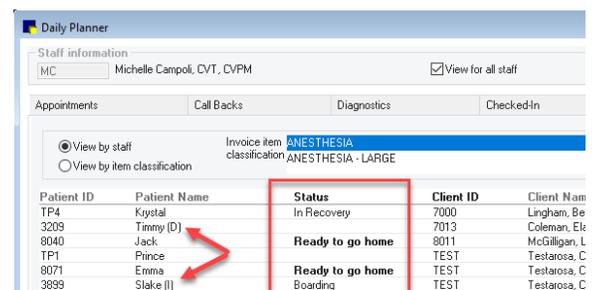
Clients/Patients

- Client balance transfers can be performed with either debit or credit balances. Credit transfers for a specific dollar amount must be entered as a negative.
- A new tool for deleting client records (**Tools>Delete client**) is now available to help practices comply with local Personally Identifiable Information (PII) laws. IDEXX recommends you consider other data retention laws before using this tool. Refer to the F1 Help for additional details.
- The 10-character client ID length has been restored.
- We removed outdated terms and included contemporary client titles in the Client title list.

Daily Planner

- The patient's inactive or deceased status now appears by the Patient Name field on Daily Planner tabs with specific patient rows.
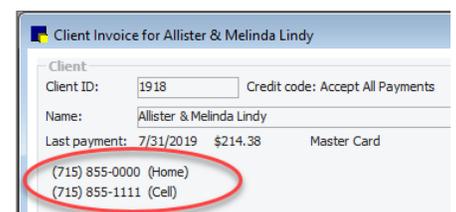- The patient's hospital status now appears on the Checked-in and Patient Visit List tabs.

Email

- New email settings for Gmail can be set under **Controls>Defaults>Settings>E-mail**.
- The email message length was increased from 512 to 2048 characters.
- We improved the communication (email/fax) process so the window and attached PDF are correctly displayed when client or patient names contain accented or special characters (# or %).
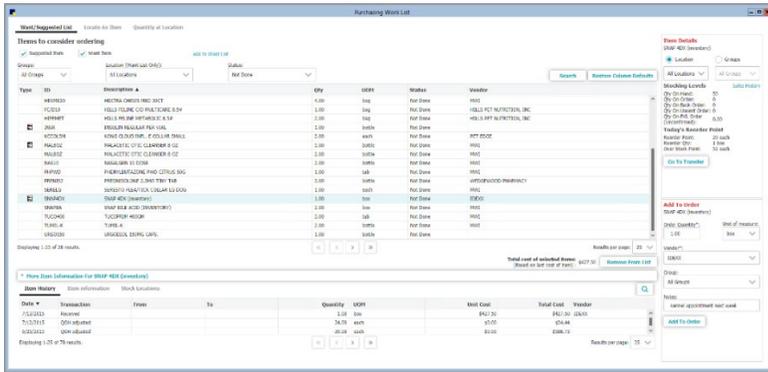
Estimates and invoices

- The client primary phone number and email address are now displayed on preview and printouts of estimates and invoices.
- All client telephone numbers are now displayed on the Client Invoice window.
- Taxes are now rounded consistently on estimates, the PVL, and invoices, so all tax amounts are displayed and reported consistently.
- Discounts are now rounded consistently on invoice, estimate, PVL, and document items.
- Pet pictures are no longer duplicated on the invoice.

Inventory

- Corrected the tab control and PO number fields in the Create Purchase Order window accessed from the Purchasing Work List.
- Improved the process of saving long PVLs with large numbers of quantity on hand (QOH) tracking items.

- User interface updates were applied to inventory and communications windows.

- The quantity-on-order total for the Purchasing Work List item detail is now displayed correctly.

Medical notes and correspondence (documents)

- The doctor signature bookmark window now displays active names in alphabetical order.
- The laboratory results bookmark now displays the time, according to regional time display settings.
- The rDVM bookmark uses the referral information that is set as primary vs. history.
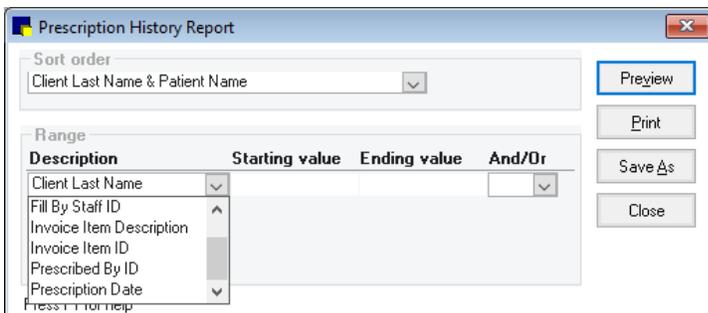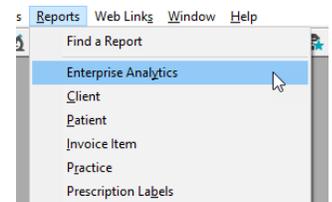- Dates are no longer truncated on voided documents.

Laboratory

- The three-tab laboratory results now reflect the newly updated interface from VetConnect PLUS.
- (U.S. only) There is now an IDEXX Reference Laboratories preferences option to use either your laboratory invoice price or the list price when marking up prices and auto-creating new lab items.
- Updates have been made to IDEXX VetLab Station and to auto-billing to support the new ProCyte One* analyzer.
- When viewing laboratory results from the IDEXX Message Center, the correct Patient Clipboard now opens.

Patient Clipboard

- You can now use the right-click menu to access the Patient Clipboard from both the Lab Requests and Results window and the Boarding Reservations List window.
- The appointment history is now displayed on the client Appointments tab for the past 180 days, to align with the patient Appointments tab.
- The VetConnect PLUS tab on the Patient Clipboard now reflects the newly updated interface from VetConnect PLUS.
- (Australia) The date format has been corrected for the client last-payment date.
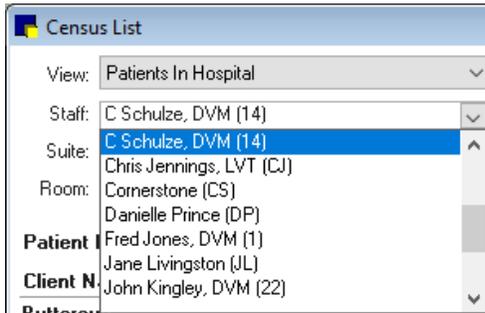
Reports

- Checked-in by information will appear on the print/preview of patient census reports.
- The Reports menu has a new link for Enterprise Analytics. Use the link to log in and view your complimentary IDEXX Key Metrics Overview reports (formerly IDEXX Dashboard report) or to sign up for the report and to learn about other reporting tools with this new service.
- The Prescription History report now offers range options for Item and Staff ID. The Item ID appears on the report preview, print, and save-to-file formats. Long item descriptions and prescription instructions no longer overlap on the report preview and printout.

- ☁ (Recommended for Cornerstone Cloud users only) An option to **Batch print** is now available to reduce the number of print jobs sent to the cloud document printer when you print monthly invoices and statements. **Note:** The number of accounts per batch is set to 200 accounts per file. Customer support can adjust this setting, if needed.

Other enhancements and improvements

- New staff IDs can now be up to 6 characters long. **Note:** Current staff IDS **cannot** be modified.
- Names in the Staff drop-down list on the Census List (F3), the Physical Exam window, and the Log In window are now displayed as *staff name (staff ID)*, as seen on the Lab Requests and Results window and the Image Requests and Results window.

- Appointment, client, patient, and compliance alerts are displayed consistently from all check-in workflows, based on client and patient alert settings.
- When defining the primary reason for visit (**Controls>Reason for Visit**), you can now select a **Referral recheck** check box. The box can be checked by default at patient check-in to improve tracking and reporting of new and recheck referral cases.
- The cursor focus has been corrected in the weight field on the check-in window in specific workflows to reduce entry errors.

- The Web Links menu includes new selections for SmartFlow, remote access, and Pet Health Network* Pro texting
- The messaging related to the File menu and exceeding the seat license count has been modified for clarity.
- The invoice billing message has been reformatted (with left-justified text and smaller margins) to improve readability and display more text.
- The client description now prints correctly on prescription refills and renewals in cases where the hospital description was modified since the original prescription.
- Made improvements to unattended end of day processing time.
- The database will remain locked for posting transactions between unattended end of day and unattended end of month (when set to run immediately following unattended end of day).
- We have standardized the rounding method used for item pricing entry from SmartFlow to PVL.
- The outdated Hills Feeding Guide menus and options have been removed because no further updates will be available.
- The Data Services Agreement has been removed from the Tools menu. For practices wanting to sign up for the Key Metrics Overview, you can sign up and view your practice report under **Reports>Enterprise Analytics**.
- An issue has been resolved for certain workflows that inhibited the completion of subsequent Whiteboard treatments when processing multiple treatments.
- A "not responding" message no longer appears when you enter a vaccine tag number in cases where there are more than 32,767 matches.
- The PVL will retain changes made to the item order when saved.
- To remove an existing password in the Security Setup window, click **Clear current password**.
  Note: An administrator password is required to access security settings.
- Accessing CareCredit* will open the CareCredit portal directly. Cornerstone client information will not be passed to the portal at this time.

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