

September 26, 2000

**MEMORANDUM**

To: Cornerstone Agencies

From: Thomas W. Simonds,  
Vice President of Information Technology Services  
Illinois Primary Health Care Association

Subject: Cornerstone Software Upgrade Version 7.23

Cornerstone is being upgraded to version 7.23. The new version is being released in three phases. To determine the date on which you will receive the new version, please refer to the following schedule:

<b>Clinic ID</b>	<b>Release Date</b>
001001 – 031112	October 9, 2000
031113 – 099004	October 16, 2000
101001 – 203001	October 23, 2000

*Note: The first time you select “Cornerstone” from the network menu after receiving the updated version, it will take approximately fifteen (15) to thirty (30) extra minutes to load the system due to the processing involved in updating your computer with the new version.*

While the system is processing the version upgrade, you will see a blue screen containing a white window with a message that states “DHS UPDATE PROCESS IS RUNNING ON THIS MACHINE B WORKSTATION TEMPORARILY UNAVAILABLE B PLEASE WAIT B THANK YOU”. Until the processing is complete and this message has been removed from the screen, no one should attempt to logon at any other workstation. Users may begin logging into Cornerstone after this process is complete.

The descriptions of the changes made in the version have been broken down into the following three sections: General Changes, Screens and Reports. If you have any problems or questions regarding the upgrade process, please contact the Cornerstone Call Center at (877) 447-4221 / (877)-4IPHCA1.

## GENERAL CHANGES

- **Clinic Schedules (AD04)** – If a user changes a schedule time that affects a participant, AD04 has been modified to display a warning message listing the date, day, time and length of each appointment that will be affected.

- **Termination Reason Codes**

Termination Reason Code “41” – “Duplicate Record” was removed from Cornerstone, and the Termination Reason Code “11” was changed from “Dual Participation” to “Duplicate Record”.

- **Statewide Look-Up (PA01)**

The Statewide Look-up screen (PA01) has been modified to help eliminate potential duplicate participants. When performing a search on PA01, the system will first search the agency’s local records, and any potential matches will be displayed in the “Participant Browse – Local” pop-up box. If the correct participant is not displayed in the “Participant Browse – Local” pop-up box, the user presses <Esc> to continue, and the system will search statewide records. Any potential matches will be displayed in the “Participant Browse – Statewide” pop-up box.

- If no possible matches are found in the local files, Cornerstone will automatically perform the statewide search.
  - If the participant has been flagged as a duplicate on the Participant Enrollment screen (see changes below), “Duplicate” will appear on the second line of the address in both the “Participant Browse – Statewide” and the “Participant Browse – Local” pop-up boxes.
  - This screen’s name has been changed from “Statewide Look-Up” to “Participant Look-Up”, which is reflected on the Participant menu.
- **Participant Enrollment (PA03)**

The Participant Enrollment screen (PA03) has been modified to help identify duplicate participants. Previously, in the “Medical Risk” field, a case manager could enter a “Y” or “N” to indicate a medical risk alert. This field has been modified to allow any user to enter a “D” for “Duplicate” to indicate that the record is a duplicate. At this time, an alert record is created, thereby indicating that this participant has been identified by the agency as a duplicate. This alert will then be passed along on the Master Index for statewide awareness.

After entering “D” in the “Medical Risk” field for a participant:

- the message “View Alerts DUPLICATE” will be displayed in the Participant Standard Processing Block (PSPB). (The PSPB is located at the top of the screen where the Participant Name, ID and address is displayed).
  - On the Participant Look-Up screen (PA01, formerly called the Statewide Look-Up screen), “\* \* DUPLICATE \* \*” will be displayed on the second line of the address in both the “Participant Browse – Statewide” and the “Participant Browse – Local” pop-up boxes.
- **Group Browse**
- The Participant Standard Processing Block (PSPB) has been modified to allow users to view the selected participant’s group. With the PSPB active on any screen, pressing <Ctrl+G> will display the Group Browse pop-up box, which lists all members of the group (Participant ID, Last Name, First Name, and Relation). Users are able to select a new participant from the Group Browse pop-up box.

The Group Browse function can also be used in specific fields on the Schedule Appointment screen (SC02) and the Class Schedule screen (SC03) when the user is attempting to coordinate activities for two or more participants in the same group.

- Schedule Appointment (SC02): Pressing <Ctrl+G> in the “Part ID” field when adding an appointment for a participant will display the Group Browse pop-up box. Users are able to select a new participant from the Group Browse pop-up box in order to schedule an appointment for that participant.
- Class Schedule (SC03): Pressing <Ctrl+G> in the “Participant ID” field when adding a participant to a class will display the Group Browse pop-up box. Users are able to select a new participant from the Group Browse pop-up box in order to add that participant to the class.

- **Next Available Appointment – Schedule Appointment (SC02)**

The Schedule Appointment screen (SC02) has been enhanced to allow users to perform a ‘Next Available Appointment’ function. Pressing the <F10> - Next Available key will display the Next Available Appointment pop-up box. A list of the site’s schedules is displayed, and users can select the schedule(s) from which to make the appointment. Users can also enter a date range, the amount of time needed for the appointment, and a resource number (optional).

After entering the selection criteria, the Next Available Appointment Browse pop-up box will appear. All available appointments that fit the entered criterion will be displayed, and the user can select an appointment. After selecting an appointment, the Schedule Appointments window will be displayed with the selected schedule and day. The user will proceed with scheduling the appointment in the correct time slot.

- **Home Assessment (706) – Question Added**

The question “Are cords from window coverings secure and out of reach?” and a corresponding goal “D14 - Suitable Housing” have been added to the Home Assessment (706).

- **Upload/Download Message – Portable PC Upload/Download (AD09)**

Any time your computer loses power while working in Cornerstone, it is possible that files may be corrupted or damaged. As a result, a message will be displayed each time the user uploads or downloads to the laptop from the Portable PC Upload/Download screen (AD09). This message will serve as a reminder for the users to plug in their laptops when uploading or downloading data.

- **EOD/BOD Reindexing Enhancements – Clinic Administrative Data (AD14)**

The Clinic Administrative Data screen (AD14) has been modified to change the way the Automated Reindexing is scheduled to run. Users will now be able to choose the Day of the Week (i.e. Monday, Tuesday, Wednesday, etc.) on which you wish to run reindexing.

Reindexing will still automatically run with the End of Day process. PLEASE NOTE: If your clinic has not reindexed in over SEVEN (7) days the system will automatically reindex ALL TABLES with that nights End of Day process.

- **Screen Changes**

- The Case Management Assignment History screen (CM01) and the Case Notes screen (CM04) have been modified to allow users to perform a participant lookup in Participant Standard Processing Block (PSPB). Previously, users were unable to complete this function on these two screens.
- The Biologics Inventory screen (AD05) has been modified so users can edit shots that have different shot types for the same lot number.

- **Electronic Cornerstone User Manual**

The electronic Cornerstone User Manual has been modified to reflect the changes found in Version 7.23. Other changes include:

- Appendix J – Cornerstone Data Dictionary has been added. This document contains tables and fields utilized by the Cornerstone software, and is useful when developing ad hoc reports with the Foxfire Report Writing Tool.
- Appendix K – Cornerstone Forms has also been added. This appendix includes both the English and Spanish versions of the Cornerstone Informed Consent Form. With this change, the Cornerstone Informed Consent Form may be printed from any Cornerstone workstation. Also included in Appendix K are forms such as the Incident Call Record, the Cornerstone Equipment Theft/Loss Report Form, and the Change in Cornerstone Contact Reporting Form.
- Section 2.2.4 ReachOut Site Instructions have been updated to reflect the current software used by ReachOut sites.
- Section 2.10 Local Area Network has been updated to reflect the current software used in the Tape Backup Process.

## **MULTIPLE CASE MANAGER ENHANCEMENT**

The case manager assignment function in Cornerstone has been enhanced to allow for multiple case managers to be assigned to the same participant. With the new version, users will be able to assign unassigned participants who have a program record in the Breast and Cervical Cancer Program (BCCP), Early Intervention (EI), Family Case Management (FCM), Healthy Families Illinois (HFI), and/or Healthy Start Case Management (HSCM) to the appropriate corresponding case manager. Therefore, multiple Case Managers/Service Coordinators with different roles (CM, EI, BCCP, etc) can be assigned to a participant at the same time.

This function is done on the Caseload Reassignment screen (AD17), on which a Program column has been added. If a participant is enrolled in both EI and CM, a participant record for each program will appear on AD17. Therefore, the participant's EI record can be assigned to the appropriate service coordinator, and the participant's CM record can be assigned to the appropriate case manager.

To accommodate these enhancements, Version 7.23 will also include a maintenance program that will check all participants' program records and fill in a matching Program ID for all existing (open) case assignments. Therefore, when users view the Caseload Reassignment screen (AD17), all of their current case assignments will appear with the appropriate Program ID filled in.

Other screens and reports have also be reviewed and updated to allow for the multiple case manager function. Although users will not see changes to the reports, the following reports were reviewed and updated to allow for the multiple case manager assignments:

- Home Visits Needed (HSPR0738)
- Face to Face Visits Needed (HSPR0739)
- EI – Participant Enrollment Information Report (HSPR0770)
- EI – Authorized Provider Services Report (HSPR0771)
- EI – Pending Provider Services Report (HSPR0772)
- EI – Participant Follow-up Report (HSPR0773)
- EI – Initial IFSP Report (HSPR0774)
- EI IFSP Report (HSPR0777)

The following reports have been modified to allow for the multiple case manager assignments:

- Participant Case/Program Detail (HSPR0206) report – a Program column has been added to the Case Management Assignment History section.
- Summary of Participants Case Managed by Case Manager (HSPR0708) – the report layout has been modified so that participants are now grouped by the case manager and program.
- Upcoming Terminations (HSPR0743) - the “Reason” column was changed to “Program”.
- Case Management Caseload Summary Report (HSPR0745) – changed the name of the report to “Caseload Summary Report”. Users can enter the a specific program code to select the caseload for only that program, and the report name will reflect the program that was chosen (i.e., “Caseload Summary Report for HFI Program”). If no program code is entered, the caseload for all programs will be selected (“Caseload Summary Report for All Programs”). In addition, the report layout has been modified so that participants are grouped by case manager and program.

The following screens have been modified to allow for the multiple case manager assignments:

- Case Management Assignment History (CM01) – a Program ID column has been added to the Case Management Assignment History window.
- Caseload Inquiry (CM05) – a Program ID column has been added to the Caseload Detail screen.
- Participant Profile (PA02) – a pop-up box has been added for viewing multiple case managers. If two or more case managers have been assigned to a participant, the “Case Mgr” field will be titled “Multi CM”. The user can view the case managers by pressing <Ctrl+F1> to highlight the “Multi CM” field. Pressing <Enter> will display the pop-up box, which lists each assigned case manager and the corresponding program for which they case manage. Pressing <Enter> again will return the user to the Participant Profile screen (PA02).

## **BCCP ENHANCEMENTS**

- **Results for Procedure Code 76942**

The following possible results for procedure code 76942(US GUIDE NEEDLE BX) have been added:

- B31 = NEGATIVE/BENIGN
- B32 = ATYPICAL
- B33 = SUSPICIOUS FOR MALIGNANCY
- B34 = INSUFFICIENT SAMPLE

- **BCCP – Open Screening Cycle Follow-up Report (HSPR0785)**

The BCCP – Open Screening Cycle Follow-up Report (HSPR0785) has been modified to so that only participants with a status treatment of “2” – Pending will be selected. Previously, the report also selected participants with a status treatment of “1” – Started. In addition, this report has also been modified to not include deceased women.

- **BCCP – Detailed Procedure and Reimbursement Report (HSPR0783 Modification)**

A signature line has been added to the bottom of the BCCP – Detailed Procedure and Reimbursement Report (HSPR0783).

## DIABETES ENHANCEMENTS

- **Diabetes Foot Screening (PA38) - New**

A Diabetes Foot Screening screen (PA38) has been added to Cornerstone. PA38 allows users to document foot screenings of diabetic patients in Cornerstone. The screen contains a diagram of the top and bottom of a foot, on which users can indicate the findings of the screening. Users will also be able to assign a Risk Category and enter comments regarding the screening.

In conjunction with this screen, a new report has also been added to Cornerstone. After completing PA38, the user can press <F10> – Print Foot to print the Diabetic Foot Screening report (HSPR0797). The information recorded on PA38, including the foot diagrams, print in report format. HSPR0797 cannot be found on the Cornerstone Reports menu; it is only available by pressing <F10> from the PA38 screen.

- **Diabetes Medications (PA36) - New**

A Diabetes Medications screen (PA36) has been added to Cornerstone. PA36 allows users to track medication usage of diabetic patients in Cornerstone. The information recorded on PA36 includes the medication prescribed, start and end dates, units, dosage, and frequency.

- **Diabetes Reminder Notices (HSPR0606) - New**

A new report has been added for Diabetes Reminder Notices (HSPR0606). Participants enrolled in the IDCP program will be selected for this report on the anniversary month they were enrolled in the Diabetes program. HSPR0606 produces a listing and labels that can be used for follow-up mailings by the clinic.

- **Diabetes Screening Report (HSPR0795) Modified**

The Diabetes Screening Report (HSPR0795) now computes the percentages and assessment counts correctly. Previously, if a Medicaid code was incorrect for any of the participants, the report would print a blank page.

HSPR0795 was also enhanced to summarize specific Diabetes assessment questions by race/ethnicity breakdown, including all the new Diabetes assessment questions.

- **New Diabetes Assessment Types**

Three new Diabetes assessment types have been added to Cornerstone:

- DMCV – Diabetes Cardiovascular Health Assessment
- DMF – Diabetes Foot Care/Risk Assessment
- DMP – Diabetes Pregnancy Assessment

## EARLY INTERVENTION ENHANCEMENTS

*The following changes have been made to the Cornerstone software since the release of Cornerstone Version 7.0. Some of these enhancements were previously released in Cornerstone Version 7.1, 7.14, 7.16, 7.2, 7.21, or 7.22. Therefore, if your site received one of these versions, some of these modifications may not be new to your site.*

- **Diagnostic Code Added**

The ICD-9 code “V19 – Family Hist of Other Condition” has been added to Cornerstone for use on the Service Entry screen (SV01).

- **Provider Status Code Added**

The Individual Provider Status code of “N” (Not Approved) has been added to Cornerstone.

- **IFSP Development Codes**

The following IFSP Development codes have been added to Cornerstone for use on IFSPs:

- W7511 - Aural Rehabilitation
- W8732 - Developmental Therapy
- W8778 - Orientation and Mobility
- W7522 - Family Training and Support
- W8770 - Nursing
- W8774 - Nutrition
- W8750 - Psych & Other Counseling
- W8741 - Social Work & Other Counseling

- **Eligibility Determination Codes Added**

The following expanded Cornerstone Eligibility Determination Codes are currently in use on the Cornerstone system:

- **E01 - Elig - Delay/Tested** - Children who were tested at 30% or more delay.
- **E03 - Elig - Clin Jdg/Delay** - Children who were not testable but 30% or more delay is determined through clinical judgement of evaluators.
- **E02 - Elig - Med Diag/Listed** - Children with a diagnosis from the Eligible Conditions List.
- **E04 - Elig - Clin Jdg/Med Diag** - Children with a diagnosis not on the Eligible Conditions List but clinical judgement of a qualified physician or specialist says that the diagnosed condition does typically result in significant developmental delay or disability.
- **E05 - Elig - Clin Jdg/P Risk DD** - Clinical Judgement of evaluators is that child is at significant risk of developmental delay if EI services are not provided and child's parent has been diagnosed with developmental disability.
- **E06 - Elig - Clin Jdg/P Risk SED** - Clinical Judgement of evaluators is that child is at significant risk of developmental delay if EI services are not provided and child's parent has been diagnosed with severe emotional disturbance.
- **E07 - Elig - Clin Jdg/Risk AUH** - Clinical Judgement of evaluators is that child is at significant risk of developmental delay if EI services are not provided and child has following three risk factors:
  - 1) Mother currently abuses alcohol or other substance (A)
  - 2) Mother is currently under 15 (U)
  - 3) Child and family are homeless (H)
- **E08 - Elig - Clin Jdg/Risk AUR** - Clinical Judgement of evaluators is that child is at significant risk of developmental delay if EI services are not provided and child has following three risk factors:
  - 1) Mother currently abuses alcohol or other substance (A)
  - 2) Mother is currently under 15 (U)
  - 4) Child is diagnosed with Relationship or Attachment Disorder (R)
- **E09 - Elig - Clin Jdg/Risk AHR** - Clinical Judgement of evaluators is that child is at significant risk of developmental delay if EI services are not provided and child has following three risk factors:
  - 1) Mother currently abuses alcohol or other substance (A)
  - 3) Child and family are homeless (H)
  - 4) Child is diagnosed with Relationship or Attachment Disorder (R)
- **E10 - Elig - Clin Jdg/Risk UHR** - Clinical Judgement of evaluators is that child is at significant risk of developmental delay if EI services are not provided and child has following three risk factors:
  - 2) Mother is currently under 15 (U)
  - 3) Child and family are homeless (H)
  - 4) Child is diagnosed with Relationship or Attachment Disorder (R)
- **Early Intervention Service Authorization Entry (SV07) Modifications**
  - The Early Intervention Service Authorization Entry screen (SV07) has been modified so that new records cannot be saved with out a procedure code.
  - Users can add authorizations for services provided during the participant's eligibility period even though they may currently be terminated. This feature will only be available until all EI sites have been converted to Cornerstone.
  - The "Payee" field has been moved to directly above the "Individual Provider" field, and users can now cancel an authorization then reenter.
  - All "overlapping" errors have been changed to warnings, and various other error messages have been cleaned up.
- **Early Intervention Program Data (PA35) Modifications**
  - Users will not be able to add any EI program records on the Early Intervention Program Data screen (PA35) while working on the laptop in the field. Therefore, users must do all adds on PA35 prior to downloading to the laptop. Users will still be able to use the F6-EDIT function on PA35 screen in the field. Screen security will not change when the laptop is connected to the network.
  - The "Current IFSP End Date" has been modified. Cornerstone will calculate the "Current IFSP End Date" as one (1) year from the "Current IFSP Begin Date". However, users will be able to extend the "Current IFSP End Date" up to three months beyond the system-generated date, but not beyond the child's third birthday.
  - Users can now edit the Follow-up Date. This field defaults to six months from the Current IFSP Begin Date, but can be changed by the user.
  - New risk eligibility determination reasons have been added for use on PA35.

- The “CHI Status” field has been removed and the field “DCFS Ward” added. The value for the DCFS Ward field will be either a “Y” or “N”, and will be determined by the current Medicaid record.
- An <F9> - Partforms fast path key has been added to PA35 to allow users to directly access the Participant Forms screen (CM10).
- **Participant Forms (CM10)** – The Participant Forms screen has been modified to not allow users to enter invalid codes in the “Format Type” field. Previously, this field would accept any value entered if the record was saved while the cursor was still in this field.
- **EI - Individual Provider Report Disclaimer**  
On the EI – Authorized Services Provider Report (HSPR0771) and the EI-IFSP Report (HSPR0777), the phrase “OR OTHER EQUALLY QUALIFIED, ENROLLED INDIVIDUAL” was added after the individual provider’s name. This modification will allow provider agencies to utilize and bill for any equally qualified, enrolled provider employed by their agency.
- **EI- Pending Provider Services Report (HSPR0772) Modification**  
The sex label on the EI- Pending Provider Services Report (HSPR0772) has been expanded from four to six characters to allow for the entire word “FEMALE” to print on the report.
- **Report Changes**  
The Primary Diagnosis field, Provider Information and page length errors were modified on the Early Intervention reports. You should see these changes on the following reports:
  - EI - Participant Enrollment Information Report (HSPR0770)
  - EI - Authorized Provider Services Report (HSPR0771)
  - EI - Pending Provider Services Report (HSPR0772)
  - EI - IFSP Report (HSPR0777)
- **Miscellaneous Changes**
  - Additional questions have been added for the IFSP Levels of Development (EILD)” assessment code.
  - Changes have been made to the form type EI – IFSP Cover Page (EICV)”.
  - EI participants will be auto terminated thirty (30) days after the child’s third (3rd) birthday instead of on the child’s third (3rd) birthday.

## WIC ENHANCEMENTS

- **WIC Food Package Updated**  
The food packages for low iron formula now read "14 - 16 oz powder low iron formula" in order to accommodate different brands of formula. This change took effect June 12, 2000.
- **Termination Reason Code**  
A new Termination Reason Code of “42” – “Dual Participation” was added to Cornerstone. Use this termination code if a WIC Participant has been identified as participating on more than one WIC program during the same period of time. Once identified as dual participation, the local WIC clinic should follow the appropriate procedures in notifying the client, and use this termination code at the clinic in which the client does not wish to participate. Please refer to the Illinois Policy and Procedure Manual for clarification of this policy.