

# IDEXX REFERENCE LABORATORIES INTEGRATION GUIDE

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# INTRODUCTION

The IDEXX Reference Laboratories VetConnect® service is now integrated with AVImark® software.

Using the VetConnect service, your practice can:

1. Seamlessly create electronic IDEXX test requisition forms for your IDEXX Reference Laboratories test orders.
2. Automatically download IDEXX Reference Laboratories results into your patients' medical records.

There are several benefits to using VetConnect services:

- ✓ Improved order accuracy with bar-coded IDEXX forms and automatic error checking
- ✓ Elimination of misspelled patient, doctor, and staff names
- ✓ Automatic capturing of test fees to reduce missed charges

This document explains how to set up and start using the VetConnect service in AVImark software, how to use the VetConnect service to order tests, and how to download IDEXX Reference Laboratories results into your software.

## REQUIREMENTS AND SUPPORTED SOFTWARE VERSIONS

Your practice must provide the following:

1. Internet access on all computers that will be used to create test requisitions.
2. An IDEXX VetConnect account and an IDEXX web services ID and password (instructions for obtaining both are included in this document).
3. AVImark Version 2011.3.11.0 or higher.
4. Actively enrolled in AVImark Technical Support plan (required if a software update or setup assistance is needed).

# REQUESTING A VETCONNECT ACCOUNT

To use VetConnect services through AVImark software, your practice must have a VetConnect account and an IDEXX web services account ID and password. If your practice does not already have these, contact VetConnect Customer support:

- ✓ In the U.S., call 1-888-433-9987, or go to [vetconnect.com](http://vetconnect.com) and click **Subscribe now**, or email [vccontactus@idexx.com](mailto:vccontactus@idexx.com).
- ✓ In Canada, call 1-800-667-3411, or email [vcCanada@idexx.com](mailto:vcCanada@idexx.com).

Ask customer support to set up both a VetConnect account for you and a web services account ID and password. Be prepared to provide the following information:

1. Your IDEXX Reference Laboratories account number
2. The name of the person at your practice who will administer the account, including his or her email address
3. The name of your practice management software

IDEXX will provide a user name and password for the VetConnect administrator, and will provide an IDEXX web services account ID and password. You will need all of these in order to complete the integration.



*If you think your practice may already have a VetConnect account, but are not sure who the account administrator is, contact customer support, as described above.*



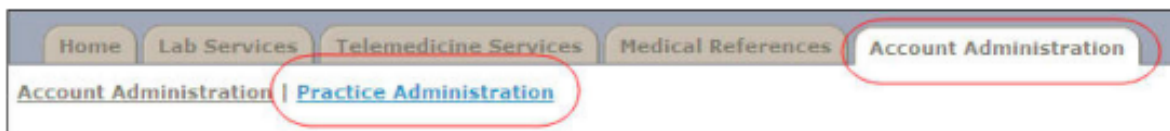
*Once you have a VetConnect account, you can view your IDEXX Reference Laboratories results online at [vetconnect.com](http://vetconnect.com) from anywhere at any time.*

## Adding Staff to the VetConnect Account

Before you can start using VetConnect services to create IDEXX test requisitions, the VetConnect administrator must add the practice's staff members to the VetConnect account.

To add members to the VetConnect account:

1. Go to [vetconnect.com](http://vetconnect.com) (U.S.) or [vetconnect.ca](http://vetconnect.ca) (Canada).
2. Enter the VetConnect administrator user name and password, and then click **Enter VetConnect**.
3. Select the **Account Administration** tab, and then click the **Practice Administration** link at the top of the page.



4. In the Practice Members area, click **Add New Member** to display the New Account information form.
5. Fill in the required fields (marked with asterisks), and then click **Create**.
6. In the Permissions area, select the permissions for this member:
  - ✓ **View Lab Reports:** User can view all laboratory result reports for your practice.

- ✓ **Order Tests/Consult:** User can request additional testing and internal medicine consultations through vetconnect.com.
- ✓ **Administer Practice:** User can edit practice information and add or delete account members.
- 7. Click **Save**.
- 8. Keep a list of the VetConnect user names and passwords because these may be needed in a future step.

## SETTING UP VETCONNECT SERVICES IN YOUR AVLMARK SYSTEM

Now that you have everything you need from IDEXX, you must set up your AVImark software so you can use VetConnect to create test requisitions and so your software can automatically download test results from IDEXX Reference Laboratories.

### Setting Up AVImark to Order Tests and Download Results



*All username and password information must be entered or re-entered into the appropriate Advanced Options fields after you update to 2011.3.11.0.*

AVImark has changed the way it handles loading and storing IDEXX results. When you load results using the Load button in the Requisition Management window, all available test results are downloaded from IDEXX and stored in individual XML files in a new folder. Results are acknowledged automatically at the time of download. Results that have been imported to an AVImark patient record are stored in another new folder. These imported XML files are automatically deleted after 45 days.

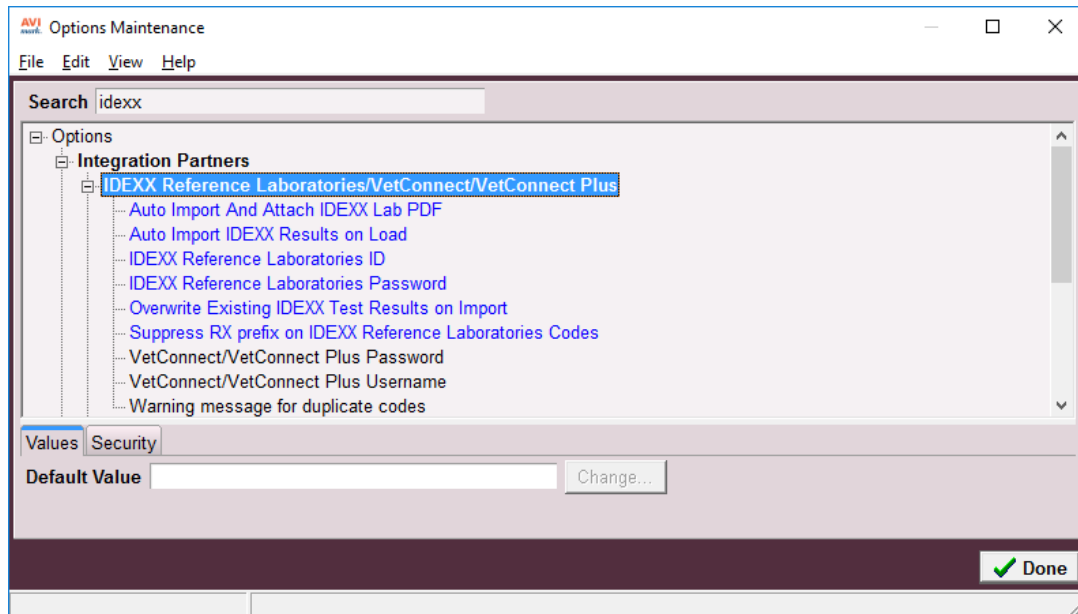
The new folders noted above are created automatically within the AVImark folder. The new folders are:

- ✓ **IDEXX Requisitions** — This folder is created directly within the AVImark folder and contains all downloaded result XML files that have not yet been imported to AVImark patient records.
- ✓ **Imported Results** — This folder is automatically created within the IDEXX Requisitions folder. All results are transferred from the IDEXX Requisitions folder to this location upon being imported to patient records. The XML files reside at this location until 45 days have passed, at which time they are automatically deleted. Automatic deletion helps to prevent the folder from becoming unnecessarily large.



*Do not rename, move, or delete these folders. There are no options to allow file name or location changes. If these folders are not found, they are automatically recreated each time the Load button is clicked within the Requisition Management window.*

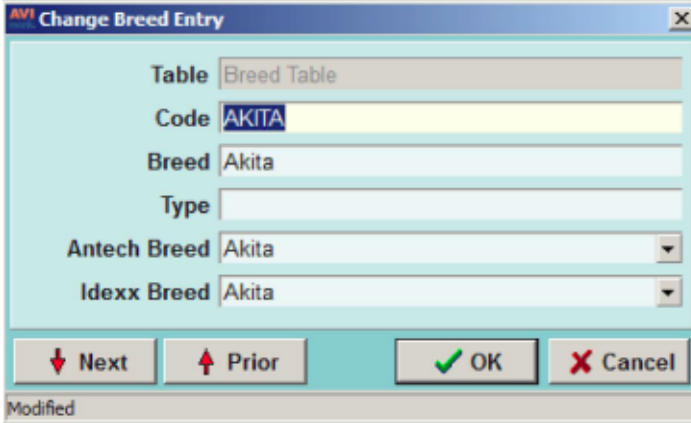
# Set Up - Advanced Options



1. **Auto Import And Attach IDEXX Lab PDF** — Setting this value to True automatically downloads and imports the Lab Result PDF to the IDXREQ entry in Medical History as a File Attachment.
2. **Auto Import IDEXX Results on Load** — Setting this value to True automatically imports results to the Tests window of the IDXREQ line entry in Medical History.
3. **IDEXX Reference Laboratories ID** — This field should contain the IDEXX-assigned account ID (formerly VCAgent User ID).
4. **IDEXX Reference Laboratories Password** — This field should contain the IDEXX account password (formerly VCAgent password).
5. **Suppress RX prefix on IDEXX Reference Laboratories Codes** — This field controls whether or not there is an RX assigned at the beginning of each IDEXX Reference code when imported as an AVImark Treatment.
6. **VetConnect/VetConnect Plus Password** — This field should contain the IDEXX-assigned VetConnect password.
7. **VetConnect/VetConnect Plus Username** — This field should contain the IDEXX-assigned user name.

## Set Up - System Tables

There is a new addition in the Breed Table to accommodate AVImark/IDEXX breed matching.



The screenshot shows a dialog box titled "Change Breed Entry" with the following fields and controls:

- Table: Breed Table
- Code: AKITA
- Breed: Akita
- Type: (empty)
- Antech Breed: Akita
- Idexx Breed: Akita
- Buttons: Next, Prior, OK, Cancel
- Status: Modified



- ✓ You do not need to make matches in the breed list itself. If an exact breed match is possible, it is done automatically. If necessary, you can match breeds manually when generating the requisition.
- ✓ Species matching is automatic, requires no intervention, and is based on breed assignment.

## ALIGNING YOUR TEST CODES, SPECIES/BREEDS, AND PRICES

### Set Up - Treatment List

IDEXX test codes can be mapped to AVImark treatment codes in multiple ways, as described below.

#### Mass Mapping

1. From the Treatment List, select **Import Treatments | Import IDEXX Reference Laboratories Treatments**. All IDEXX Reference Laboratory services are imported into AVImark.

The following improvements have been made to mass mapping:

- o Faster speed
- o Progress bar
- o Cancel button
- o A Markup Percentage field that lets you set the Treatment Price based on the List Price of the tests being added as AVImark Treatments

## Associating IDEXX Reference Services

This method displays the entire list of AVImark treatment codes and descriptions, as well as a column of IDEXX Reference codes and descriptions. If an AVImark treatment currently has an IDEXX test code associated, it will be displayed in the IDEXX Reference column.

1. From the Treatment List, select **Import Treatments | Associate IDEXX Reference Laboratories Services**.
2. To associate an IDEXX code with an AVImark treatment, click in the IDEXX column and select the IDEXX code from the drop-down list, or begin typing in the field to filter selections.



## Mapping by AVImark Treatment Category

This method loads only the AVImark treatments within a category, where IDEXX Reference Lab assignments can be added, changed, or removed.

1. To map a single AVImark Treatment Category, right-click the desired AVImark Treatment Category, and select Associate this category with IDEXX Reference Lab Services.
2. Associate individual treatments with Reference Lab Services.



## Map AVImark Treatments to IDEXX Reference Lab Codes

1. Open the Change Treatment window for the AVImark code.
2. Select **Laboratory | Labs | New**, and make your new entry association.

# ENABLING EMPLOYEE DISCOUNTS FOR LABORATORY TESTS

IDEXX offers a professional courtesy discount to practices that use IDEXX Reference Laboratories as their primary laboratory. Doctors and staff qualify for discounts on tests run at an IDEXX reference laboratory for their personal pets. This discount applies to all tests except cytology, histology, and send-outs. For doctors and staff to receive the discount, the test requisition form must clearly indicate that the patient is an employee pet.

If you have questions about your practice discount, please contact your IDEXX Reference Laboratories sales consultant.

## Setting Up Employee Discounts For IDEXX

A new **Action Code** has been added to the Patient Area to mark a patient as an In-House Pet. The “@” Action Code lets you designate specific patients as In-House, instead of being required to do so for each IDEXX Reference Lab requisition generated for those animals.

# USING VETCONNECT SERVICES TO CREATE AN IDEXX REFERENCE LAB TEST REQUISITION

## Creating a Requisition for Individual Test Orders

To generate a requisition:

- ✓ Right-click | Create Requisition from the Patient or Medical History area of the CID.

OR

- ✓ Enter the IDEXX treatment code into the patient's medical history.

Generating a adds an IDXREQ line entry, containing unique requisition identifiers, to Medical History. Results will be imported for this line entry when they are returned by the lab.

If add-ons are available for the requested test, a secondary "Create Requisition " window is displayed, from which the add-ons can be selected.

## Viewing a Completed or Pending Requisition

To view or print requisitions:

1. Go to **Services | Requisitions Management | Requisitions** tab.
2. Highlight the requisition and click **Print**. (Then click **Preview** if you want to view but not print it.)

# DOWNLOADING TEST RESULTS

Test results from IDEXX Reference Laboratories can be downloaded automatically to your software and saved to patient records.

## Retrieving Results

Results are imported to Medical History automatically when the Advanced Options “Auto Import IDEXX Results on Load” is set to **True**.

1. Select **Services | Requisition Management | Download Requisitions** tab, and click the **Load** button.

Results being returned from the lab are displayed. When a requisition match is made, the requisition entry is displayed in black, indicating the “Imported” status. To display automatically imported results, select the Medical History Requisition entry in Medical History for the imported entries.

Information displayed in orange indicates “orphaned” results, for which no automatic association could be made. These results can be manually associated with the correct entries.

2. To load results that have already been imported to a patient record for viewing or importing, click the **Load Previously Imported**. These results are stored for 45 days after being imported.

## Downloading a PDF of Results

A new **right-click** menu option has been added in the **Requisition Management | Download** tab labeled “**Download PDF**”.

This option lets you manually download any desired result PDF file, whether or not the “Auto Import And Attach PDF” option is set to True. The PDF files will be attached to the requisition line in the patient’s medical history under file attachments.