

ClieTrax/IDEXX Reference Laboratories

Integration User Guide

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Contents

Introduction	4
Requirements and supported software versions	4
Requesting a VetConnect account	4
Adding staff members to the VetConnect account.....	5
Setting up VetConnect Services in your ClientTrax system.....	5
Setting up ClientTrax IDEXX options	5
Setting up ClientTrax IDEXX users	6
Setting up ClientTrax order items	6
Enabling employee discounts for laboratory tests	6
Using VetConnect to create a LabREXX test requisition	7
Downloading test results.....	7
Managing final and partial results.....	7

Introduction

IDEXX Reference Laboratories and VetConnect* are now integrated with ClientTrax software.

Using VetConnect, your practice can:

1. Seamlessly create electronic LabREXX* 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:

- Improved order accuracy with bar-coded LabREXX 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 VetConnect in ClientTrax, how to use VetConnect 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:

- Internet access on all computers that will be used to create test requisitions
- A VetConnect account and an IDEXX web services ID and password (instructions for obtaining both are included in this document)
- ClientTrax 7.0c9 or later
- Current version of IDEXXLabResults.exe (3.0 or greater), available here: [clienttrax.com/Update/IDEXX Lab Results.exe](http://clienttrax.com/Update/IDEXX%20Lab%20Results.exe)

Requesting a VetConnect account

To use VetConnect services through ClientTrax 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 PLUS customer support:

- **In the U.S.**, call **1-888-433-9987**, or go to vetconnect.com and click **Subscribe now**, or email vccontactus@idexx.com
- **In Canada**, call **1-800-667-3411**, or email vccanada@idexx.com

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

- Your IDEXX Reference Laboratories account number
- The name of the person at your practice who will administer the account, including their email address
- 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 to complete the integration.

Note: If you think your practice may already have a VetConnect PLUS 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 Laboratory results online at vetconnect.com from anywhere at any time.

Adding staff members to the VetConnect account

Before you can start using VetConnect services to create LabREXX 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 (U.S.) or 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**.

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 ClientTrax system

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

With ClientTrax, you can automate test ordering, print your order forms, and retrieve test results. Working with IDEXX, ClientTrax has reduced the workload for creating these orders by at least 50%, and now there are no worries about incorrect information, wrong ID numbers, or misplaced papers.

Setting up ClientTrax IDEXX options

There are two Setup Options you need to confirm in File > Administration > Setup > Medical Records:

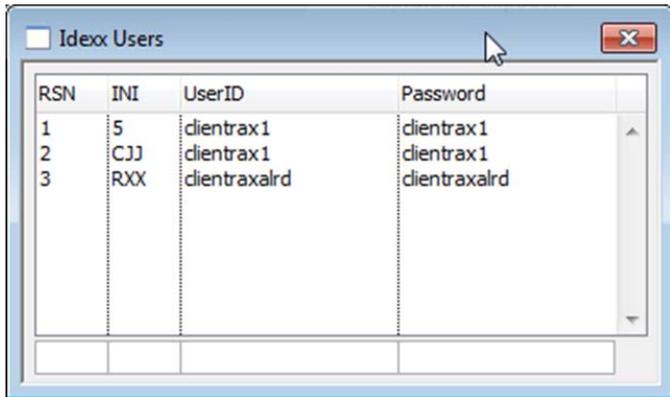
- Define the "IDEXX Web Path" as shown below, unless you are directed otherwise by ClientTrax support.
- Check the "Use XML" option.

Note: Do not check the "Use Patient ID" check box, unless you are directed to by ClientTrax support.

Outside Lab Setup	
Antech Web Path:	C:\AntechLabResults
Idexx Web Path:	C:\IDEXXLabResults
Idexx Options:	<input type="checkbox"/> Use Patient ID <input checked="" type="checkbox"/> Use XML

Setting up ClientTrax IDEXX users

Each user and doctor must be added to the VetConnect account. You must then enter the VetConnect user names and passwords into the ClientTrax-IDEXX user database and link them with ClientTrax user names using your INI code.



RSN	INI	UserID	Password
1	5	dientrax1	dientrax1
2	CJJ	dientrax1	dientrax1
3	RXX	dientraxalrd	dientraxalrd

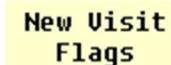
You also need a user name and password for downloading results. This must be a Global User, entered with the initials "RXX," as you see above.

Setting up ClientTrax order items

Next, you must set up the laboratory test items in your inventory to include the IDEXX codes you will order.

To link test items with IDEXX codes:

1. Find your inventory item in ClientTrax.
2. Click **New Visit Flags**.



**New Visit
Flags**

3. Make sure that **Lab Log** is selected in the **Flags** list.

This assures that ClientTrax creates Lab Orders when this item is selected in the Medical Record Lab Log, Medical Record Treatments, Medical Record Charges, and New Visit Charges windows. In most cases, this is the only option you need to select in the window for a Lab Test charge.

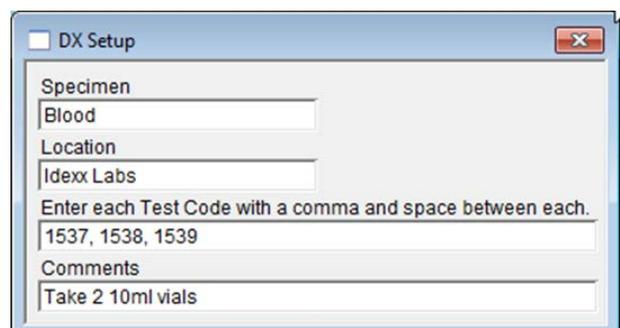
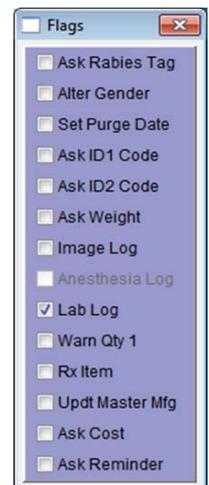
4. Close the New Visit Flags window.
5. To set up your lab test items to include the IDEXX, find your inventory item in ClientTrax, and click **Dx Setup**.
6. Enter the following information into the DX Setup window:

Specimen: The type of specimen to be sent to the laboratory.

Location: The name of the laboratory.

Test Code(s): The IDEXX code numbers. If there is more than one test to be performed on the specimen, separate each code by a comma and a space, as shown here.

Comments: Any additional instructions or notes. If you enter this item as part of a Treatment in the Medical Record, these notes appear in the Instructions field. They also appear in the White Board.



DX Setup

Specimen
Blood

Location
Idexx Labs

Enter each Test Code with a comma and space between each.
1537, 1538, 1539

Comments
Take 2 10ml vials

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 the 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 LabREXX test requisition form must clearly indicate that the patient is an employee pet.

To receive the discount:

Enter EM in the Client Code field on the Client Card for each employee record in ClientTrax. ClientTrax uses this code to automatically flag employee tests for the proper discount.

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

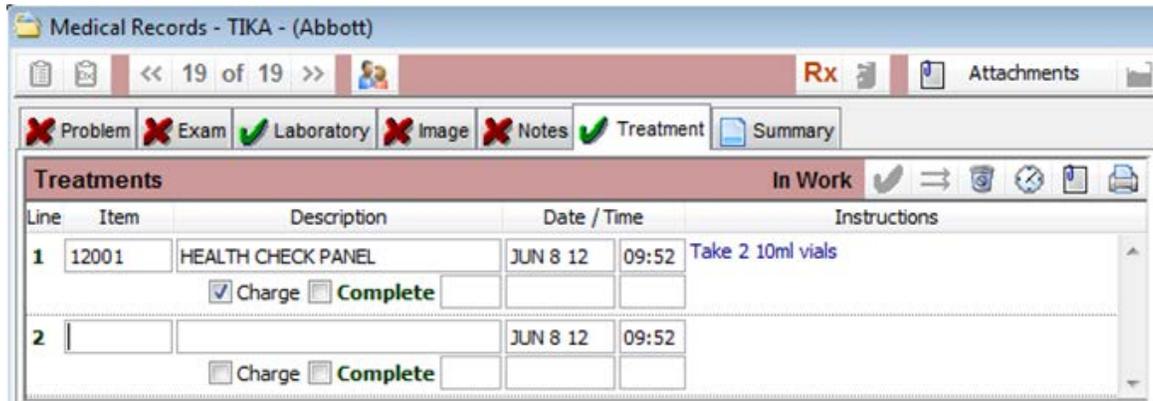
Using VetConnect to create a LabREXX test requisition

There are two ways to create an order for your outside laboratory tests:

- Add them to the Treatment section of the Medical Record.
- Enter them directly into the Charges section of the Medical Record.

For either method, follow these steps:

1. First, create or edit a Medical Record for the patient needing the test.



The screenshot shows a software interface for medical records. The window title is "Medical Records - TIKKA - (Abbott)". The interface includes a navigation bar with icons for home, back, forward, and user profile, along with a page indicator "19 of 19". A secondary bar contains "Rx" and "Attachments" icons. Below this is a tabbed menu with options: "Problem" (with a red X), "Exam" (with a red X), "Laboratory" (with a green checkmark), "Image" (with a red X), "Notes" (with a red X), "Treatment" (with a green checkmark), and "Summary". The "Treatments" tab is active, showing a table with columns: "Line", "Item", "Description", "Date / Time", and "Instructions". The table contains two rows. Row 1: Line 1, Item 12001, Description HEALTH CHECK PANEL, Date/Time JUN 8 12 09:52, Instructions Take 2 10ml vials. Below this row are checkboxes for "Charge" (checked) and "Complete". Row 2: Line 2, Item (empty), Description (empty), Date/Time JUN 8 12 09:52, Instructions (empty). Below this row are checkboxes for "Charge" and "Complete".

Line	Item	Description	Date / Time	Instructions
1	12001	HEALTH CHECK PANEL	JUN 8 12 09:52	Take 2 10ml vials
		<input checked="" type="checkbox"/> Charge <input type="checkbox"/> Complete		
2			JUN 8 12 09:52	
		<input type="checkbox"/> Charge <input type="checkbox"/> Complete		

2. Next, select the Treatment/Plan tab, and enter a new Treatment or Charge item.

Note: If you are using the Treatments list and it is blank, click in the list to start a new line. Enter the inventory number for the lab test you want to order.

3. Press **Enter**. The Lab Log window opens.

The screenshot shows the 'LogWindow' application with the following details:

- Account: 6 ABBOTT, RENATA
- Patient: 7 TIKA
- Med Rec: 1252 CO: 5 Pr: CJJ Item No: 12001
- Record: Date: JUN 8 12 Time: 09:58 Status: 0
- Trans: HEALTH CHECK PANEL
- Buttons: Antech Form, Print Label, Idexx Form
- Radio buttons: Image, Anesthesia, Laboratory (selected)

Item No	Description	Lab	Specimen
12001	HEALTH CHECK PANEL	Atech Labs	Blood

Date/Time Colldd.	Tech	Test(s) Required	Date/Time Rec'd.	Date/Time Rev'd
JUN 8 12	09:58	86000	JUN 8 12 09:58	

Comment: Take 2 10ml vials - Take 2 10ml vials - Take 2 10ml vials

Double Click to add these tests to an existing order.

Most of the Lab Log window is filled out for you. You may want to add the assigned veterinary technician's initials (the person who collected the sample) and any additional instructions under **Comments**.

4. You can add additional tests to your order by entering the IDEXX order code(s) in the **Test(s) Required** field. Separate each test with a comma and a space, as below.

You may also want to modify the description to reflect the additional tests.

The screenshot shows the 'LogWindow' application with the following details:

- Account: 6 ABBOTT, RENATA
- Patient: 7 TIKA
- Med Rec: 1252 CO: 5 Pr: CJJ Item No: 12002
- Record: Date: JUN 8 12 Time: 09:46 Status: 0
- Trans: CUSTOM PROFILE SERIES
- Buttons: Antech Form, Print Label, Idexx Form
- Radio buttons: Image, Anesthesia, Laboratory (selected)

Item No	Description	Lab	Specimen
12002	CUSTOM PROFILE SERIES	Idexx Labs	Blood

Date/Time Colldd.	Tech	Test(s) Required	Date/Time Rec'd.	Date/Time Rev'd
JUN 8 12	09:46	1537, 1538, 1539	JUN 8 12 09:46	

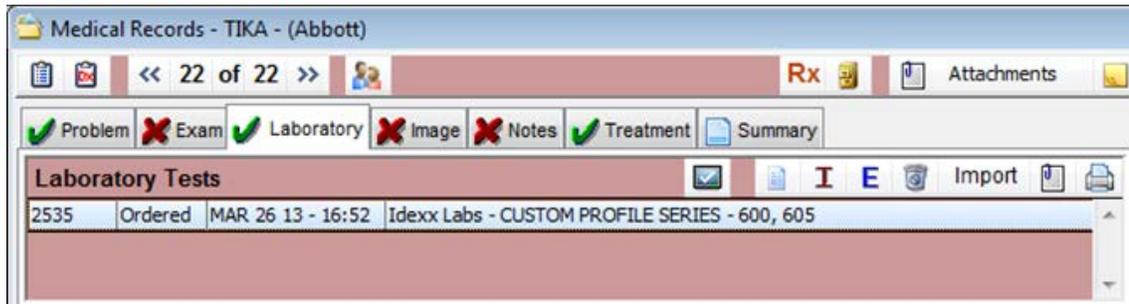
Comment: CUSTOM PROFILE SERIES - Take 2 10ml vials

Double Click to add these tests to an existing order.

HEATH CHECK PANEL 1

Remember that adding tests this way makes them part of a single charge item on your invoice. However, you may prefer to charge them separately. You can do this by adding them to an existing order as follows: When the new Lab Log window opens, double-click the check box of the existing order listed in the bottom of the window. This allows you to have multiple charged tests on a single order form.

- After you have entered all the tests you need, save the Medical Record and then open the Labs tab. You will see the new order(s) you created.

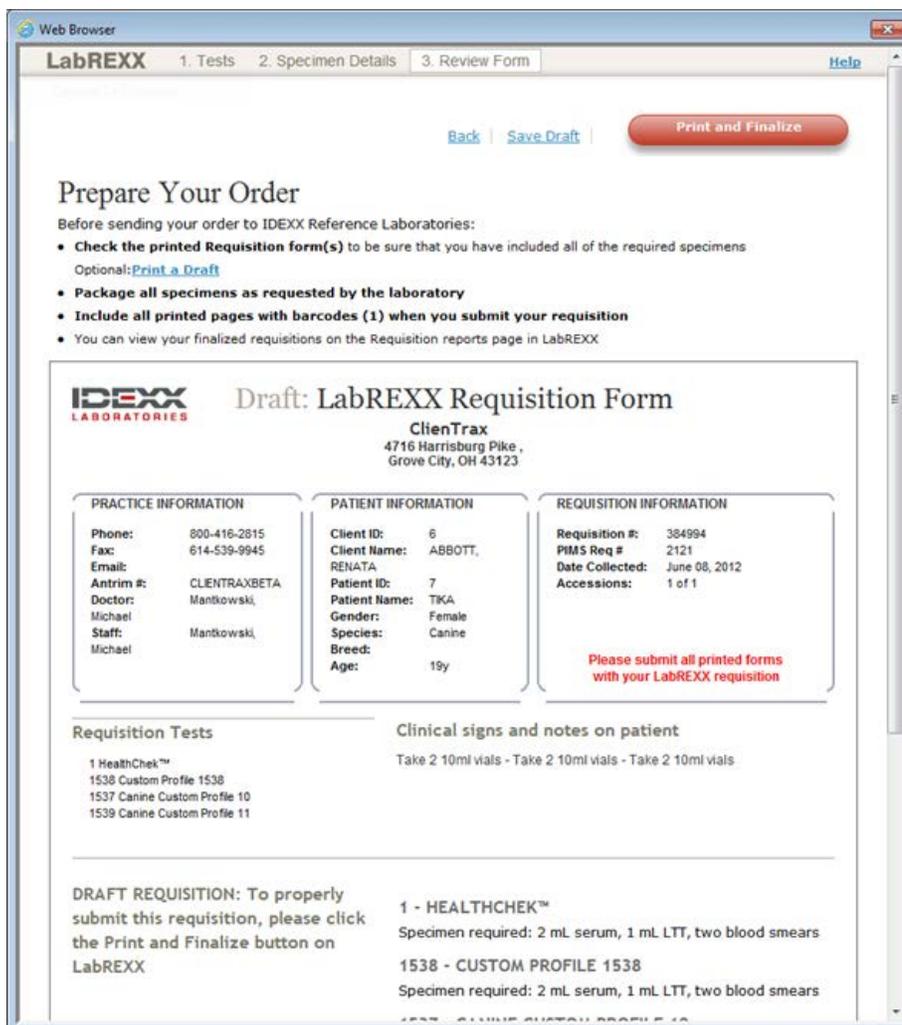


- Double-click the first order you created to open the Lab Log window.

- Click **Idexx Form** to review your order form.

The order form is bar-coded so that there will be no transcription errors once the sample is received at the lab. The form also contains more information on the samples required. Please review these instructions.

- When you have confirmed that your order form is correct, click **Print and Finalize** in the upper right to print the form. Be sure to send the form along with your sample(s).



Downloading test results

Test results from IDEXX Reference Laboratories can be downloaded automatically to ClieTrax and saved to patient records. You will want to download your lab results from IDEXX periodically.

1. To check for new results, click **Import** on the Labs tab of any Medical Record. The Lab Test Interface window opens.
2. Click **IDEXX Web Auto** to start the download process. ClieTrax connects to the IDEXX servers and downloads any waiting results.

All results are added to the proper records, and an entry is added to the White Board that results have been received. The White Board is a convenient location where you can find results waiting for your review.

You can download results as often as you like.

Managing final and partial results

Partial laboratory results may appear in the Medical Record when they are downloaded via the **Downloading test results** procedure above. The record will be automatically updated when final results are available.

