Setup Guide

IDEXX VetLab with Cornerstone Software

This guide explains the recommended way to associate your laboratory invoice items with IDEXX VetLab* in-clinic tests and profiles to ensure laboratory charges are captured.  

**IMPORTANT:** This document applies to Cornerstone* 8.4 NEXT or later. Some features may have changed from previous versions. Refer to additional online resources and Cornerstone help for more information.

Set in-house laboratory preferences
1. Go to Activities > Lab Work > Laboratories.
2. Select IDEXX VetLab In-clinic Laboratory, and then click Update.
3. Under Preferences, select Require requests and Use special actions.

Link laboratory profiles to invoice items
1. Go to Activities > Lab Work > Profiles.
2. From the Lab drop-down list, select INCLINIC.
3. Clear the Only profiles that can be requested check box, so that you can see all available profiles.
4. Select a test or profile and then click Update.
5. In the Invoice items table, double-click in the ID column, and then search for the invoice item you want to associate with the selected test or profile.
6. Highlight the item, and then click Select.
7. If you link more than one invoice item to the test or profile, specify which one is the default.
8. Click OK.

Create custom in-clinic profiles
You can create custom in-clinic profiles for tests you routinely perform at the same time and that you associate with only one charge, such as a complete urinalysis (UA) with both the chemical and microscopic test components.

**Note:** You can create custom profiles for in-clinic tests only, not for IDEXX Reference Laboratories.
1. Go to Activities > Lab Work > Profiles, and then click New.
2. From the Lab drop-down list, select INCLINIC.
3. Enter a custom profile name (it can be the same as the invoice item name).
4. Select Can be requested.
5. In the Tests/subprofiles table, click in the Type column, and then select Test (for a single test) or Subprofile (for a group of tests).
6. Double-click in either the Profile Name column or the Test Name column, and then search for and select the desired profile or test.
   **Tip:** If selecting profiles, clear the Only profiles that can be requested check box, so you can see all available profiles.
7. Repeat step 6 until you have selected all the tests or subprofiles you want to add.
8. In the Invoice items table, double-click in the ID column to search for the invoice item you want to associate with the selected test or profile.

IDEXX VetLab with Cornerstone Software
9. Highlight the item, and then click **Select**.

10. Click **OK**.

### Linking invoice items to profiles

#### Yes

- **Item ID 1**
- **Item ID 2**
- **Item ID 3**

**Profile A**

- One or many invoice items can be linked to a single profile.

#### No

- **Profile 4**
- **Profile 5**
- **Profile 6**
- **Item ID 6**

**An invoice item cannot be linked to multiple profiles.**

### Tips:
- A single test or profile can be linked to multiple invoice items (if you have different charges for the same test or profile). However, each invoice item can be linked to only **one** test or profile (see illustration above).
- A custom in-house profile can include multiple subprofiles and be billed under a single item ID.
- A complete blood count (CBC) profile is called **Hematology**; we recommend you use the Hematology profile for ordering a CBC.
- For more information about creating invoice items, refer to the onscreen help (F1 or 📖) within the software.

### Find this guide

Look under “Resources by Topic” on the **Cornerstone Software Resources** page.