

## Setting Up IDEXX Reference Laboratories with Cornerstone Software

This guide explains how to associate your laboratory invoice items with IDEXX Reference Laboratories tests and profiles to ensure laboratory charges are captured.

**IMPORTANT:** This document applies to Cornerstone\* 8.7 NEXT or later. Some features may have changed from previous versions. Refer to additional online resources and Cornerstone help [?](#) for more information.

### Link laboratory profiles to invoice items

1. Go to **Activities > Lab Work > Profiles**.
2. From the Lab drop-down list, select **IDEXX**.
3. Uncheck **Only profiles that can be requested**, 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. Click **OK**.

### Automatically create new invoice items for profiles

You can set the Cornerstone Software to automatically create invoice items for laboratory profiles.

Benefits:

- Doctors can order necessary profiles quickly and easily.
- Saves staff time—no need to create invoice items and link them to profiles.
- The IDEXX invoice item code structure is applied for easy identification of IDEXX Reference Laboratories items.
- The markup percentage, the classification/subclassification, and the item type (service) are all defined and consistently applied.

### Set laboratory default preferences:

1. Go to **Activities > Lab Work > Laboratories**.
2. In the **Lab List** window, select **IDEXX**, and then click **Update**.
3. In the **IDEXX lab preferences** area:
  - a. (Recommended) Select **Automatically update prices** if you want your prices to change whenever list prices are updated in the *IDEXX Reference Laboratories Directory of Tests and Services*.

**Note:** If you do **not** want prices to be updated automatically, do not select this option. You can manually update prices as needed; see “Manually update individual laboratory item prices” later in this document.
  - b. (Optional) Select **Allow prices to go down** if your prices should go down whenever IDEXX lowers the price in the *IDEXX Reference Laboratories Directory of Tests and Services*.
  - c. (U.S. practices only) Select **Use lab invoice pricing** to use the lab invoice price when creating new items or updating prices from the directory of services. **Note:** If you change this setting, the system will perform a necessary sync process (lasting only a few minutes) after you click **OK** in step 4.
  - d. (Recommended) Uncheck **Do not create items automatically**.
  - e. (Required) In the **Class ID** drop-down list, select the reporting classification for all laboratory invoice items when opting to create items automatically.

The screenshot shows the 'IDEXX lab preferences' dialog box. It contains several options and fields:

- Automatically update prices
- Allow prices to go down
- Use lab invoice pricing
- For creating new lab invoice items:
  - Do not create items automatically
  - Class ID: LABORATORY (dropdown)
  - Sub Class ID: IDEXX Ref lab (dropdown)
  - Markup percentage: 125.00 %

- f. (Optional) In the **Sub Class ID** drop-down list, select the reporting subclass for the laboratory invoice items.
  - g. (Required) Enter your markup percentage when opting to create items automatically.
4. Click **OK**, and let the sync process finish, if it is triggered.

## Set employee affiliation flag

For more details on the laboratory discount program for staff pets, contact your IDEXX Veterinary Diagnostic Consultant.



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1. On the toolbar, click **Patient Clipboard\*** .
2. Double-click in the **Client ID** box, and then search for and select the client.
3. Right click in the **Client information** area and select **Update**.
4. Select the **A/R Information** tab.
5. In the **Practice affiliation** area, select either **a staff member** or **a doctor on staff**.

This setting will be associated with the test bar code and will appear on the request form (where applicable) underneath the bar code.

**Practice Affiliation**

Client is  not an employee

a staff member

a doctor on staff

## Manually update individual laboratory item prices

You can use the Lab Item Price Update window to manually update prices for individual reference laboratory invoice items. IDEXX recommends that only authorized personnel have access to this function.

1. Go to **Activities > Lab Work > Update IDEXX Lab Item Prices**.  
The Lab Item Price Update window includes reference laboratory test profiles that have been linked to invoice items, along with options for allowing prices to go down, the markup percentage to use to calculate new prices, and the ability to hide rows with no price changes. The window includes these prices:
  - **Old Price**—Price that your practice currently charges (the price currently on the invoice item).
  - **Lab Price**—New cost to your practice from the latest IDEXX Reference Laboratories Directory of Tests and Services update. The displayed cost is based on your selected lab pricing default preferences (U.S. practices only).
  - **New Price**—New price that your practice will charge, based on your current markup percentage. You can edit this price for each listed profile.
2. Click in the **New Price** box for any price you need to adjust, and then enter the appropriate price.
3. To leave a price unchanged (so it remains at the old price), remove it from the list by selecting the line and pressing **Ctrl + D**.
4. Click **Apply**.
5. When prompted to apply changes, click **Yes**.

**IMPORTANT:** Clicking **Yes** will save the prices for all items displayed. Once applied, changes cannot be undone.

**Tip:** For more information, press **F1** when working within any of these windows.

## Related guides

[Cornerstone IDEXX VetLab User Guide](#)  
[Cornerstone Laboratory Daily Checklist](#)

## Find this guide

Look under “Resources by Topic” on the [Cornerstone Help](#) page.