

ImproMed* Infinity/IDEXX Reference Laboratories

Integration User Guide

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Introduction

IDEXX Reference Laboratories and VetConnect* PLUS are now integrated with ImproMed* Infinity software. Using VetConnect PLUS, your practice can:

1. Seamlessly create electronic 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 PLUS:

- 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 PLUS in ImproMed Infinity, how to use VetConnect PLUS 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. A VetConnect PLUS account and an IDEXX web services ID and password (instructions for obtaining both are included in this document)
3. ImproMed* Infinity version 4.4 or higher
4. ImproMed* Universal Lab Reader version 5.27 or higher
5. VetConnect PLUS user ID and password for each veterinarian
6. LabREXX license file from ImproMed

Requesting a VetConnect* account

To use VetConnect services through ImproMed Infinity software, your practice must have a VetConnect PLUS 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 e-mail vccanada@idexx.com.

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 their email address
3. The name of your practice management software

IDEXX will provide a user name and password for the VetConnect PLUS 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.

Adding staff members to the VetConnect PLUS account

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

To add members to the VetConnect PLUS account:

1. Go to vetconnect.com (U.S.) or vetconnect.ca (Canada).
2. Enter the 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:
 - a. **View Lab Reports:** User can view all laboratory result reports for your practice.
 - b. **Order Tests/Consult:** User can request additional testing and internal medicine consultations through vetconnect.com.
 - c. **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 PLUS services in your ImproMed Infinity software

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


Setting up your ImproMed Infinity software to use VetConnect PLUS services to order testing and download test results

Note: The following directions are for ImproMed Infinity v5.0 and higher. If you are running a version lower than 5.0, please remove the  button from the steps. The screens may be different.


To add staff member login information to ImproMed Infinity software:

Employee setup information in Infinity must include LabREXX information. If you need to set up an Infinity employee, please follow instructions in "Creating an employee;" otherwise, please refer to "Editing an employee."

Creating an employee

1. Click  > Setup > Employees > Employees. The Setup Employees dialog box opens.
2. Select **Create** in the **Mode** area.
3. Enter the desired information into the correct tabs: General, Address, Images, Custom Fields, Signature Images, LabREXX User. The following steps are specific to the LabREXX tab:
 - a. Enter the LabREXX User Name.
 - b. Enter the LabREXX Password.
 - c. Re-enter the LabREXX Password.
4. Click **Apply** and **OK** to save the changes and close the dialog box.

Editing an employee

1. Click  > **Setup > Employees > Employees**. The Setup Employees dialog box opens.
2. Select the **Employee** from the **Name** drop-down menu.
3. Select **Edit** in the **Mode** area.
4. Enter the desired information into the correct tabs: General, Address, Images, Medical Records, Security, and Desktops. The following steps are specific to the General tab:
 - a. Enter the LabREXX User Name.
 - b. Enter the LabREXX Password.
 - c. Re-enter the LabREXX Password.

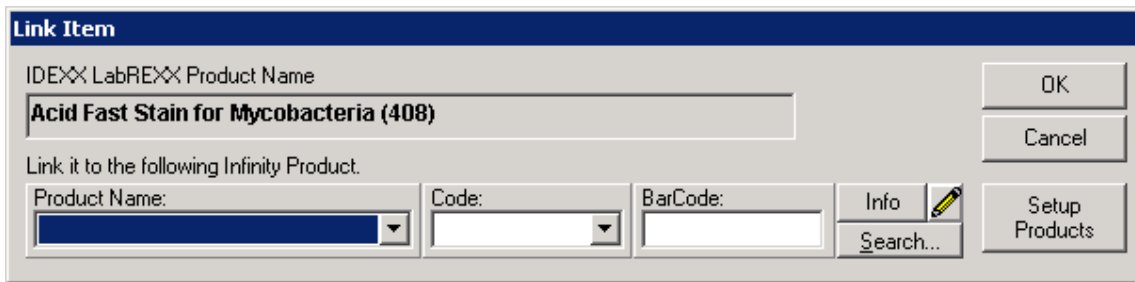
5. Click **Apply** and **OK** to save and close the changes.

To link ImproMed Infinity products to LabREXX codes:

IDEXX and Infinity will prompt for a product when the LabREXX requisition is being compiled or practices can set the product list ahead of time. Infinity automatically displays the product setup for IDEXX and allows users to select the correct Infinity product.

IMPORTANT: This tab is set up per practice.

1. Double-click the correct row for the Infinity Product. A Link Item window will appear.



2. Select the product.

3. Click **Setup Products** if the product is new.

4. Click **OK**.

5. Repeat steps 1–4 for all desired LabREXX services.

Using LabREXX to create a test requisition

The LabREXX integration lets Infinity operators generate test requisition forms online or using Infinity Lab requests. Once the request is generated, operators then print them out to include with specimens sent to IDEXX for testing, while invoicing the client for the tests performed.

When you use the LabREXX module:

- You can find and select tests quickly, using the online searchable test database.
- The printout is clear and easy to read, with a bar code containing patient information for safe and accurate sample identification.
- You'll never run out of forms just when you need them most.

The Infinity Lab Requests feature provides a means for a doctor to request (order) lab work to be completed for a patient. Lab requests then reside in a queue in which the status of each request is reported back. The requests list can be filtered by requesting provider, date, and/or the status of the requested lab work.

Requests are entered into the queue through the use of special lab request sheets (travel sheets). At the time lab work is ordered, the charge for the lab work is added to the client's invoice.

Additionally, the Lab Requests feature provides these enhancements:

- Lab results from select lab equipment providers can be automatically imported into a patient's record.
- Imported lab results can be viewed from the Lab Requests tab in the Lab Imports module.
- Labels specific to Lab Requests may be printed to facilitate the identification of samples and provide any needed information.
- The original format of the lab results can be viewed as a PDF file linked within the imported lab result.

How it works

The Lab Results module contains an optional tab called Lab Requests. From the Lab Requests tab, the operator clicks **New** to generate a lab work request. A Lab Request (Travel) sheet will open.

The operator selects the desired Sheet, Employee, Date/Time Performed, and any other designations as if they were using travel sheets to add products to an invoice/estimate/treatment plan, etc.

Next, the operator selects the requested lab work and clicks **Create**. This assigns the request a unique identification number (Lab ID) and adds the request to the list of requests.

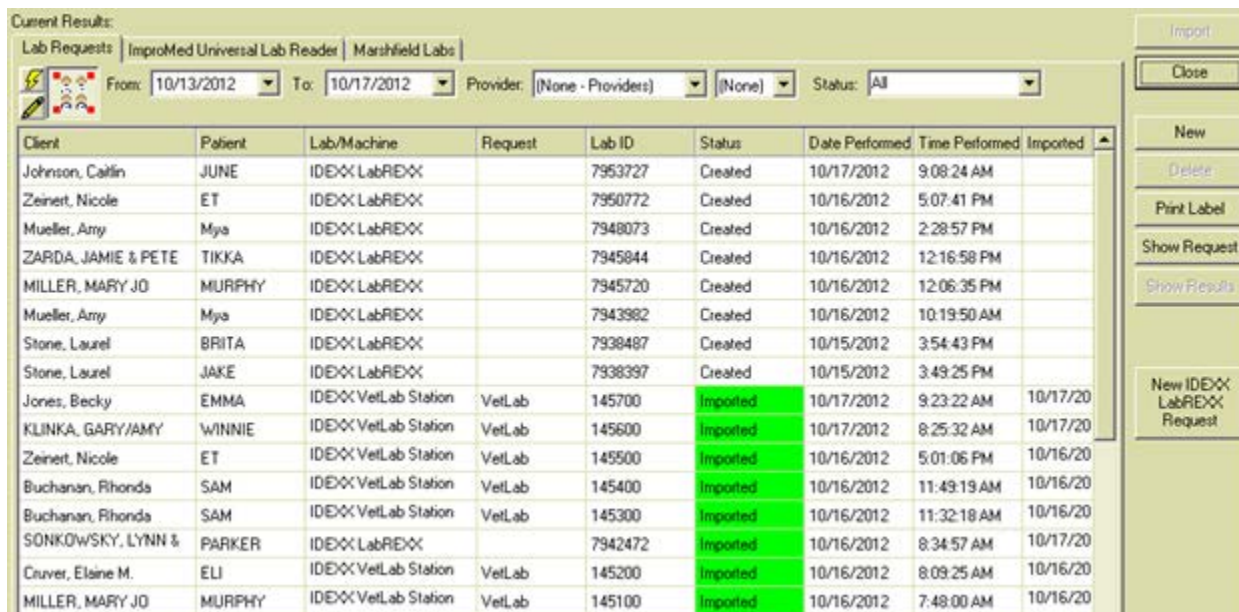
Once the request is made and added to the list of requests, it is assigned a status of *Created*, *Pending*, *Imported*, or *Not Completed*.

The **Created** status means the request has been made and nothing has changed with it.

The **Pending** status means the results are ready to be imported, but they require attention. The result must be manually addressed by going to the ImproMed Universal Reader tab, selecting the result, and addressing whatever specific needs the result has. The most common reason for a result to be Pending is the need to make the proper field associations for the results or if there is no match for the Lab ID.

The **Imported** status indicates the result has been imported into the patient's record and is ready for review.

The **Not Completed** status will be displayed only when a LabREXX requisition has not been completed by the operator, but instead the operator saved a draft.




The screenshot shows the 'Lab Requests' interface. At the top, there are tabs for 'Lab Requests', 'ImproMed Universal Lab Reader', and 'Marshfield Labs'. Below the tabs are filters for 'From' (10/13/2012), 'To' (10/17/2012), 'Provider' (None - Providers), 'Status' (All), and 'Status' (All). The main area is a table with the following columns: Client, Patient, Lab/Machine, Request, Lab ID, Status, Date Performed, Time Performed, and Imported. The table contains 17 rows of data. The 'Status' column for the last 10 rows is highlighted in green and labeled 'Imported'. On the right side, there is a sidebar with buttons: 'Import', 'Close', 'New', 'Delete', 'Print Label', 'Show Request', 'Show Results', and 'New IDEXX LabREXX Request'.

Client	Patient	Lab/Machine	Request	Lab ID	Status	Date Performed	Time Performed	Imported
Johnson, Caitlin	JUNE	IDEXX LabREXX		7953727	Created	10/17/2012	9:08:24 AM	
Zeinert, Nicole	ET	IDEXX LabREXX		7950772	Created	10/16/2012	5:07:41 PM	
Mueller, Amy	Mya	IDEXX LabREXX		7948073	Created	10/16/2012	2:28:57 PM	
ZARDA, JAMIE & PETE	TIKKA	IDEXX LabREXX		7945844	Created	10/16/2012	12:16:58 PM	
MILLER, MARY JO	MURPHY	IDEXX LabREXX		7945720	Created	10/16/2012	12:06:35 PM	
Mueller, Amy	Mya	IDEXX LabREXX		7943982	Created	10/16/2012	10:19:50 AM	
Stone, Laurel	BRITA	IDEXX LabREXX		7938487	Created	10/15/2012	3:54:43 PM	
Stone, Laurel	JAKE	IDEXX LabREXX		7938397	Created	10/15/2012	3:49:25 PM	
Jones, Becky	EMMA	IDEXX VetLab Station	VetLab	145700	Imported	10/17/2012	9:23:22 AM	10/17/20
KLINKA, GARY/AMY	WINNIE	IDEXX VetLab Station	VetLab	145600	Imported	10/17/2012	8:25:32 AM	10/17/20
Zeinert, Nicole	ET	IDEXX VetLab Station	VetLab	145500	Imported	10/16/2012	5:01:06 PM	10/16/20
Buchanan, Rhonda	SAM	IDEXX VetLab Station	VetLab	145400	Imported	10/16/2012	11:49:19 AM	10/16/20
Buchanan, Rhonda	SAM	IDEXX VetLab Station	VetLab	145300	Imported	10/16/2012	11:32:18 AM	10/16/20
SONKOWSKY, LYNN &	PARKER	IDEXX LabREXX		7942472	Imported	10/16/2012	8:34:57 AM	10/17/20
Cruver, Elaine M.	ELI	IDEXX VetLab Station	VetLab	145200	Imported	10/16/2012	8:09:25 AM	10/16/20
MILLER, MARY JO	MURPHY	IDEXX VetLab Station	VetLab	145100	Imported	10/16/2012	7:48:00 AM	10/16/20

Configuring lab request sheets

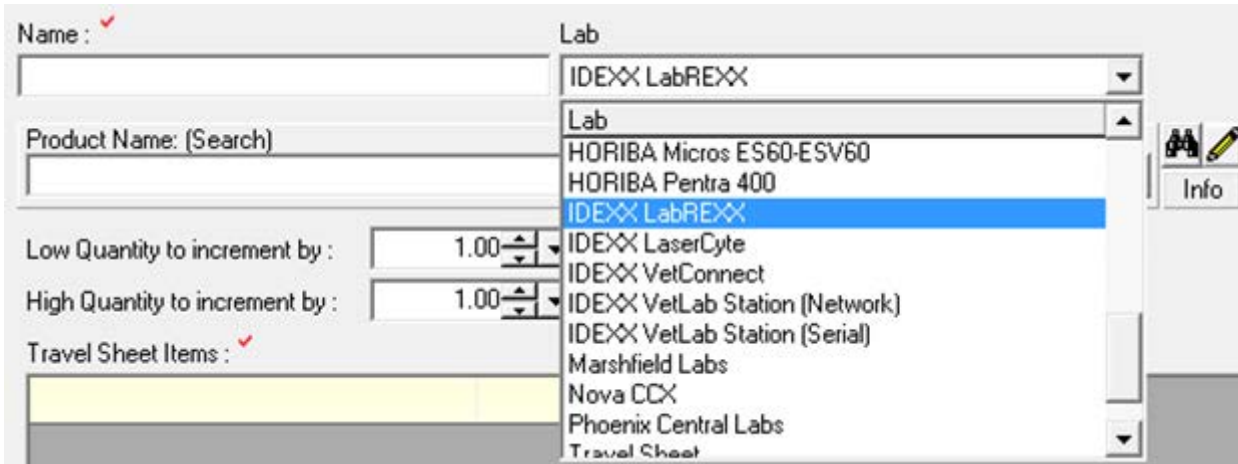
Note: This feature is available with Infinity v5.0 and higher.

To set up the Lab Requests feature in Infinity, go to  > **Setup > Medical Records > Dynamic Lab Screens > Lab Result Paths** and check the box to **Show Lab Request Tab**. This will display a new tab called Lab Requests as the first and default tab in the Lab Imports module.

Then click the following:  > **Setup > Patient Processing > Travel Sheets** and create the needed Lab Request Sheet(s).

Note: The Travel Sheets module is required to use the Lab Requests feature.

When creating the Travel Sheet for Lab Requests, it is important to designate the lab machine the sheet is for. The following illustration shows the Lab drop-down menu as seen in the Setup Travel Sheets screen:




It is important to remember that the Request Sheets are unique to each piece of equipment and must be created for each lab that requests are going to be generated for.

Select **IDEXX LabREXX** to use Travel Sheets when ordering lab tests.

Configuring the Lab Imports module

From the Infinity Desktop:

1. Click  > **Setup > Medical Records > Dynamic Lab Screens > Lab Requests**. The Setup Lab Request Labs dialog box appears.
2. Select the **Check for Lab Machine** results every interval to refresh the lab requests tab.
3. Select **Show/Import Lab Results for all Businesses**, if desired.
4. Choose how to handle attachments:
 - a. Do not save lab attachments leaves the PDF file alone.
 - b. **Attach to dynamic lab records** creates a link with the PDF file in the imported lab record.
5. Choose how to handle labels.
6. Click **OK** to save the changes and close the dialog box.



Creating a requisition for individual test orders


IMPORTANT: The Lab Request tab must be activated.

Note: The date and time of the LabREXX Request will come directly from IDEXX.

Web-based requests

Note: This method can be used with Infinity v4.4 or higher.


From the Infinity Desktop:

1. Click  > **Modules** > **Lab Results Import**. The Lab Import module opens.
2. Click the New **IDEXX LabREXX Request** button.
3. Verify that the client and patient are correct or use Find Client to select the correct client and patient.
4. Select the **IDEXX LabREXX** User of the request.
5. Click **OK**. The LabREXX website will open. If any assistance is needed with using the LabREXX or vetconnect.com site, please contact VetConnect PLUS customer support at **1-888-433-9987**.
6. Once the requisition is created, print the requisition and submit it along with the patient samples to IDEXX.
7. If prompted, select the **Species, Breed, or Sex Code**.
8. Verify the products on the **Move Products** screen.
9. Click **OK**.

Lab request sheets

Note: This method can be used with Infinity v5.0 or higher.

From the Infinity Desktop:

1. Click  > **Modules** > **Lab Results Import**. The Lab Import module opens.
2. Select the client and patient for the request.
3. Click the **New** button.
4. Select an **Employee** as the Provider.
5. Select the **IDEXX LabREXX** Sheet from the Selected Sheet.
6. If desired, select **Business, Destination, and SuperMode**.
7. Check the tests to perform and invoice.
8. Click **Create**.
9. Choose the **IDEXX LabREXX** User and click OK.
10. If prompted, select the Species, Breed, or Sex Code. The LabREXX website will open. If any assistance is needed with using the LabREXX or vetconnect.com site, please contact VetConnect PLUS customer support at **1-888-433-9987**.
11. Print the requisition and submit it along with the patient samples to IDEXX.
12. Verify the products on the **Move Products** screen.
13. Click **OK**.

Opening a draft requisition

To review an imported IDEXX Reference Laboratories result, double-click the request line or highlight the request and click the **Show Results** button. Clicking the Show Request button will also display the Lab Requests Sheet for the selected request.

Viewing a completed or pending requisition

If the import is successful, the status of the result changes to Imported.

A result status of Imported means the result has been processed, the patient's medical record has been updated with the results, and the results are ready to be reviewed. Double-clicking the result will open the lab report for quick review.

Downloading test results

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

Configuring the VetConnect PLUS lab service

1. Click **Start** > **[All] Programs** > **Infinity** > **ImproMed Universal Lab Reader** > **Setup ImproMed Universal Lab Reader**.
2. Click **Add a Lab Service**.
3. Select **IDEXX VetConnect/LabREXX (Beta)** from the Service Type.
4. Select a **Practice**.
5. Select a **Download Frequency**. ImproMed recommends every 30 minutes.
6. Enter the VetConnect PLUS user name and password.
7. Check **Include Preliminary Results**, if desired. This option forces only final results to be imported.
8. Check **Include DNR Records**, if desired. This option causes the Do Not Report results to be hidden from the imported lab results.
9. Click **OK**.
10. Click **Apply** to save the settings.
11. Click **Start** to begin the service and click **OK** to close the Setup Lab Services window.

Once results are downloaded, they are automatically imported into the patient's record.

Notification of available results

Using the Infinity Lab Retriever along with Infinity to view lab results is one of ImproMed's newest solutions. The Infinity Lab Retriever is a professional tool that allows users to stay in touch with lab results from a business anywhere in the world. Searchable fields include patient name, client name, date of lab test performed, and account number. Once the correct patient is found, the application loads all the titles of the tests performed and displays those results graphically for easy reference. By default, only patients with lab results may be viewed. Notifications may be configured so when a new result is available, the user is notified.

Downloading the PDF attachment of results

All results include a PDF of the original result from IDEXX and may be configured as described in ["Configuring the Lab Imports module."](#)

Managing final and partial results

Infinity may import partial and/or final results, depending on the configuration, as described in ["Configuring the VetConnect PLUS lab service."](#)

