Introduction

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

Using the VetConnect service, 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 services:

- 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 the VetConnect service in ClienTrax, 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. ClienTrax 7.0c9 or later
4. Current version of IDEXXLabResults.exe (3.0 or greater), available here: clientrax.com/Update/IDEXX Lab Results.exe
Requesting a VetConnect account

To use VetConnect services through ClienTrax 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 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:

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.

**Note:** 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 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 ClienTrax system

Now that you have everything you need from IDEXX, you must set up your ClienTrax 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 ClienTrax, you can automate test ordering, print your order forms and retrieve test results. Working with IDEXX, ClienTrax 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 ClienTrax 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 ClienTrax support.
- Check the “Use XML” option.

Note: Do not check the “Use Patient ID” check box, unless you are directed to by ClienTrax support.

Setting up ClienTrax 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 ClienTrax-IDEXX user database and link them with ClienTrax user names using your INI code.
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 ClienTrax 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 ClienTrax.
2. Click the New Visit Flags button.

3. Make sure that the New Visit Flag “Lab Log” is selected in the Flags list.
   This assures that ClienTrax 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.

5. To set up your lab test items to include the IDEXX, find your inventory item in ClienTrax, and click the Dx Setup button.
6. Enter the following information into the DX Setup window:
   - **Specimen**: The type of specimen to be sent to the lab.
   - **Location**: The name of the lab.
   - **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.
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 ClienTrax. ClienTrax 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 Services 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.

![Screenshot of a medical record with treatments and lab log window]

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.

![Screenshot of the Lab Log window]

   Most of the Lab Log window is filled out for you. You may want to add the assigned tech’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 by a comma and a space, as below. You may also want to modify the description to reflect the additional tests.

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.

5. 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.

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

7. Click the Idexx Form button 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.
8. When you have confirmed that your order form is correct, click the “Print and Finalize” button 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 ClienTrax and saved to patient records. You will want to download your lab results from IDEXX periodically.

1. To check for new results, select the Import button on the Labs tab of any Medical Record. The Lab Test Interface window opens.

2. Click the “IDEXX Web Auto” button to start the download process. ClienTrax 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.