StringSoft / IDEXX Reference Laboratories Integration User Guide

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Table of Contents

Introduction 1

Requirements and supported software versions 1

Requesting a VetConnect account 2

Adding staff members to the VetConnect account 2

Setting up VetConnect services in your StringSoft system 4

Add StringSoft/IDEXX laboratory requisition form 4

Lab location setup 5

Lab type setup 7

Lab type translation 8

Download and install the StringSoft/IDEXX service 9

Enabling employee discounts for laboratory tests 15

Using VetConnect Services to create a LabREXX test requisition 16

Creating a requisition for individual test orders 16

Viewing a completed or pending requisition 18

Downloading test results 20

Introduction

The IDEXX Reference Laboratories VetConnect® service is now integrated with StringSoft 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 StringSoft, 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. StringSoft IDEXX Lab Service
4. StringSoft/IDEXX custom requisition form

Requesting a VetConnect account

To use VetConnect services through StringSoft 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 for you 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.

Tip: 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**.
8. Keep a list of the VetConnect user names and passwords because these may be needed in a future step.

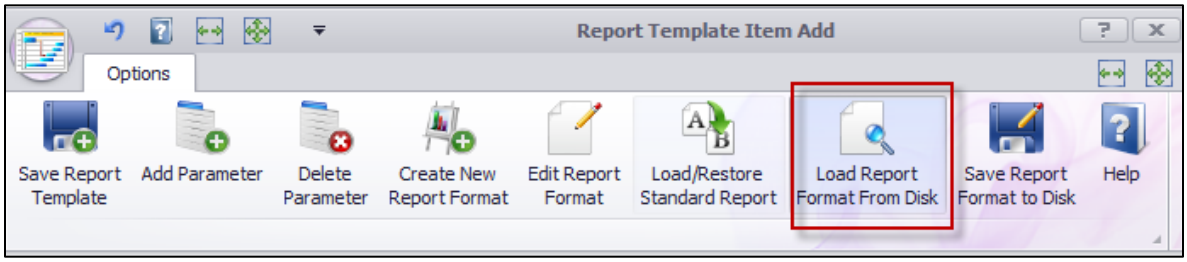
Setting up VetConnect® services in your StringSoft system

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

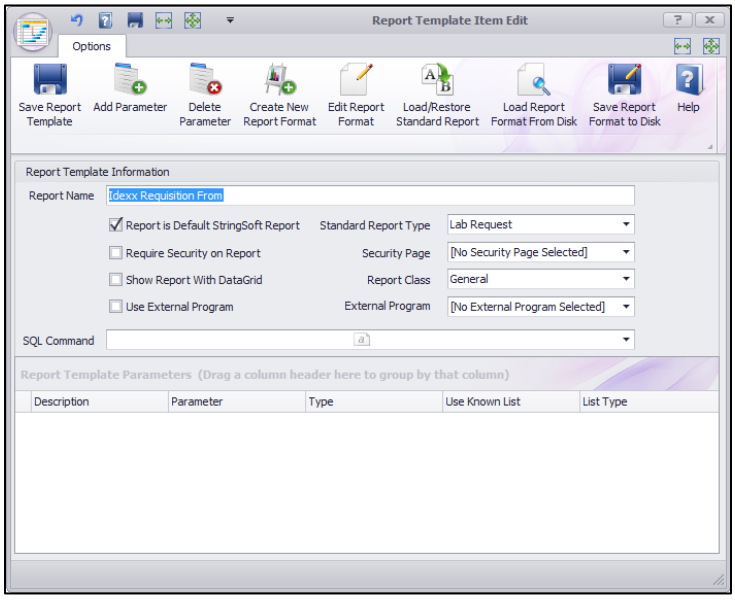
Add StringSoft/IDEXX laboratory requisition form

Obtain the custom laboratory requisition form from IDEXX or by contacting StringSoft Support.

From the Administration menu, Custom Templates. Click **Add New Report Template Item**, then click **Load Report Format from Disk**.



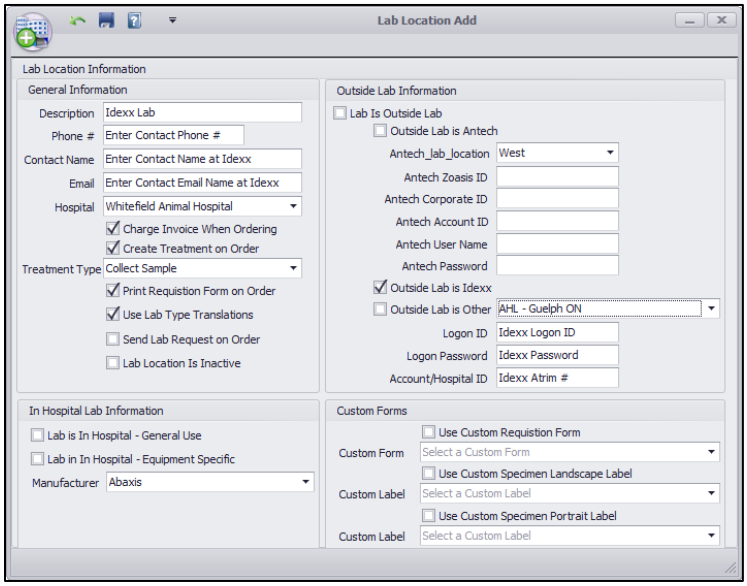
1. Select the custom report from the location you saved the report to.
2. Type a description for the report name, such as “IDEXX Requisition form.”
3. Check **Report is Default StringSoft Report**, and from the drop-down menu choose **Lab Request**.
4. Click **Save Report Template**.



Lab location setup

You must specify IDEXX laboratory location information to identify IDEXX laboratory for submitting lab requests.

From the Administration menu, Lab items, Lab Locations. Click **Add New Lab Location**.



1. Under General Information, provide the following information:
    - Description—Name of laboratory
    - Phone #—Phone number of laboratory
    - Contact name—Name of IDEXX contact
    - Email—Email address of IDEXX contact
    - Hospital—If you have a multi-hospital facility, select the hospital associated with this Lab Location from the drop-down list. (Please note that a location **MUST** be set up for each hospital.)
    - Check **Charge Invoice When Ordering** if you want to charge the client at the time of order.
    - Check **Create Treatment on Order** if you want to create a treatment for sample collection. (Only check this if you want to collect a treatment for sample collection)
    - Check **Print Requisition Form on Order** to display a pop-up reminder to print the requisition slip.
    - **Do not check** Send Lab Request on order. (This feature may be available from IDEXX at a later date.)
    - **Do not check** Lab Location Is Inactive. (Check this only when you are no longer using this lab location.)

2. Under Outside Lab Information, provide the following information:
    - Check **Outside Lab Is IDEXX**.
    - Enter the web services logon ID for IDEXX.
    - Enter the web services logon password for IDEXX. (See page 4 for information on getting the web services information from IDEXX.)

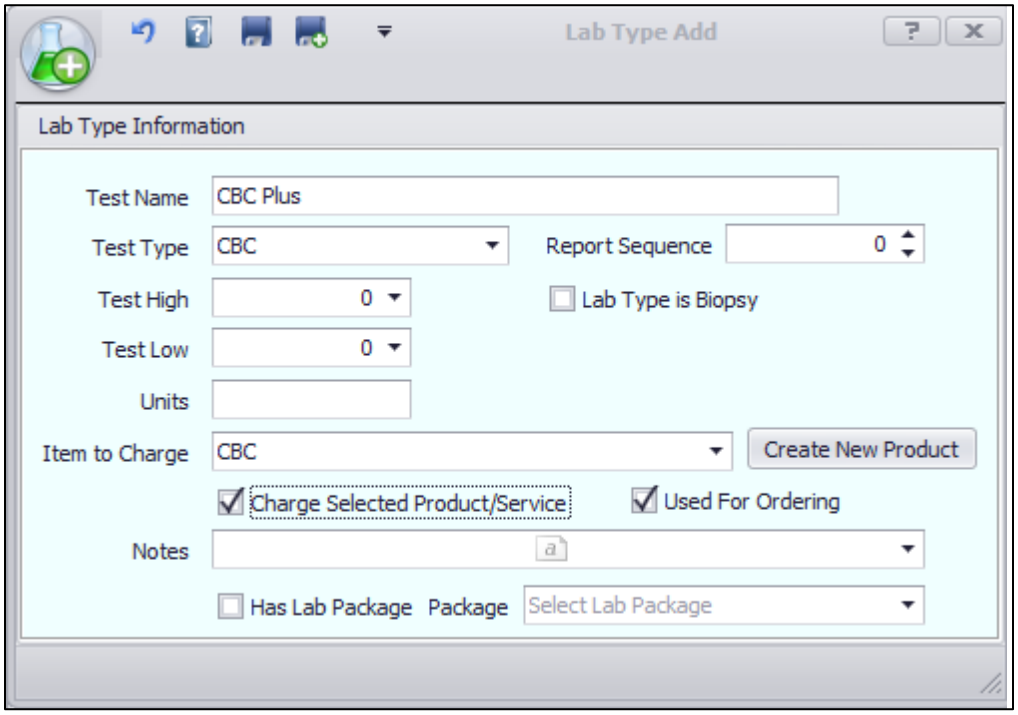
- Enter the Account/Hospital ID (the IDEXX LIMS number).

3. Under Custom Forms, provide the following information:
   - Check **Use Custom Requisition Form.** Then from the drop-down menu next to Custom Forms, select the custom form you created. (You should see only one in the drop-down list.)
4. Click the **SAVE** button .

Lab type setup

You must specify lab types for ordering IDEXX laboratory tests.

From the Administration menu, Lab Items, Lab Type. Click **Add New Lab Type**.

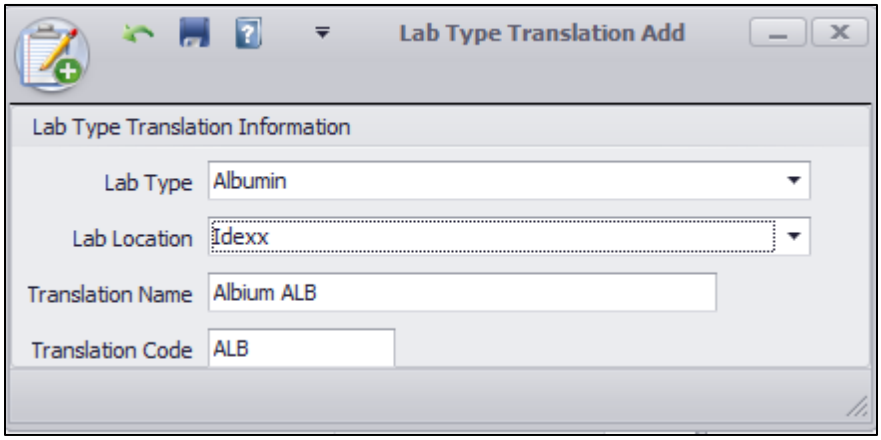


1. Provide the following information:
   - **Test Name—**Enter the name of the laboratory test.
   - **Test Type—**Select the test type from the drop-down list.
   - **Report Sequence—**Select the sequence number for this test in the report. The report sequence allows you to put the test types in a particular sequence if you choose to do so. For example, you may want CBC (1), Urinalysis (2), Chemistry(3), etc.
   - **Lab type is Biopsy**—Check this option only if the lab type is a biopsy.
   - **Test High/Low** (optional) **—**This value will be pulled from IDEXX**.**
   - **Units**(optional)Units of measure for the result.
   - **Item to Charge—**From the drop-down list, select the product/service that you want charged at the time of ordering. Then check **Charge Selected Product/Service**.
   - Check **Used for ordering—**If this option is not checked, the test will not be in the list of lab tests that can be ordered.
   - **Notes** (optional)—Any notes added here will be displayed in the notes field when you order this test.
   - **Do not check** Has Lab Package—This option is not used for outside laboratories.
2. Click the **SAVE** button .

Lab type translation

Lab type translations map your lab types to IDEXX test codes.

From the Administration menu, Lab Items, Lab Type Translations. Click **Add New Lab Type Translation**.



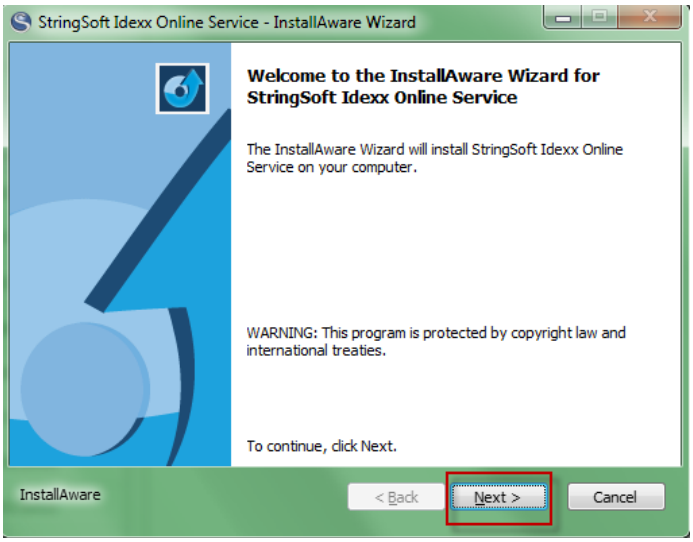
1. Provide the following information:
    - **Lab Type**—Select the lab type from the drop-down menu.
    - **Lab Location**—Select the lab location (IDEXX) from the drop-down menu.
    - **Translation Name**—Type the translation name.
    - **Translation Code**—Type the IDEXX code for the test.
2. Click the **SAVE** button .

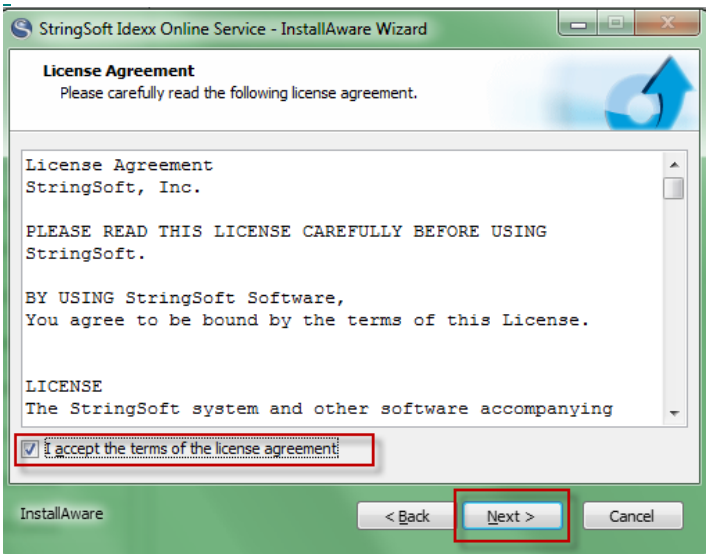
After you have set up all your lab location information, lab types and lab translations, you are ready to download the StringSoft/IDEXX service.

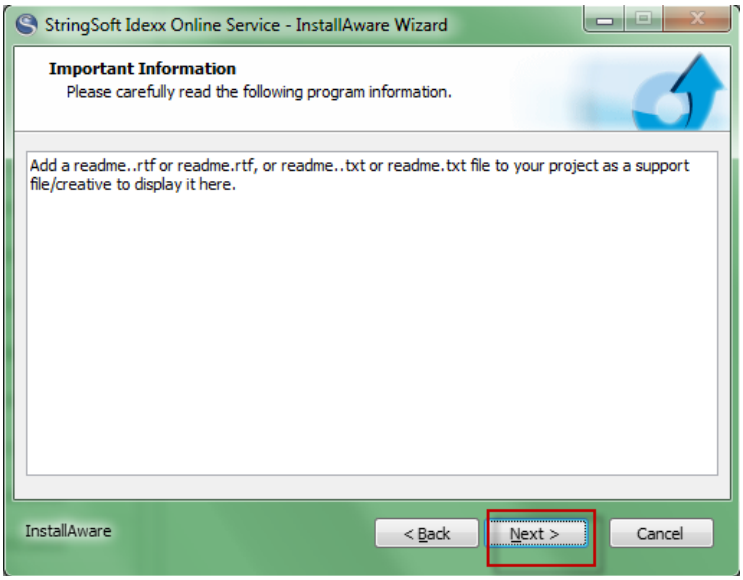
Download and install the StringSoft/IDEXX service

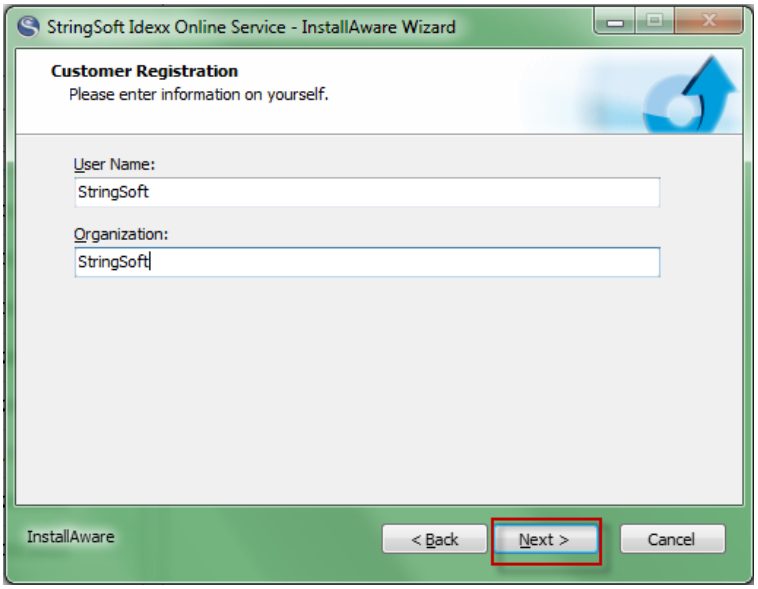
From the customer Website
www.stringsoft-customers.com
log in with your username/password.
In your list you will see IDEXX Online lab interface. Click on the disk button to download

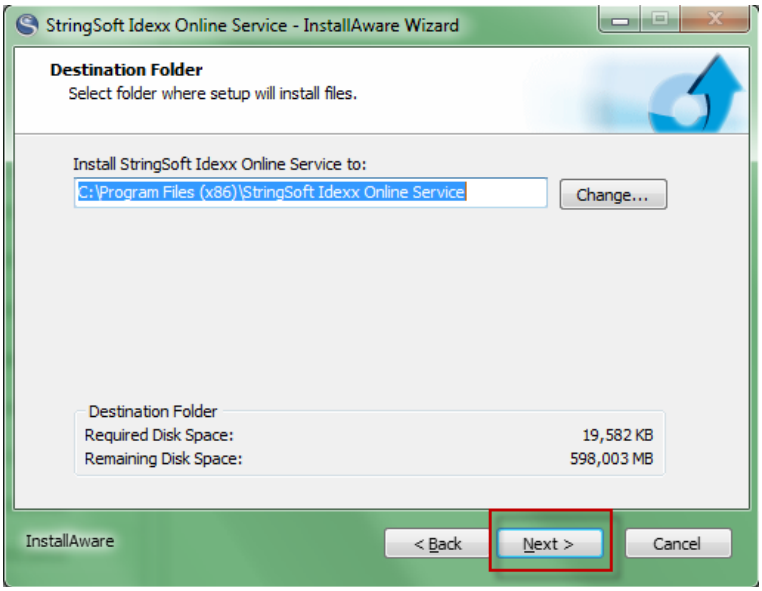
When prompted, SAVE (It is not recommended you run the download from the Webpage
Once downloaded - Double click on it and Run/Install – following prompts on screen.

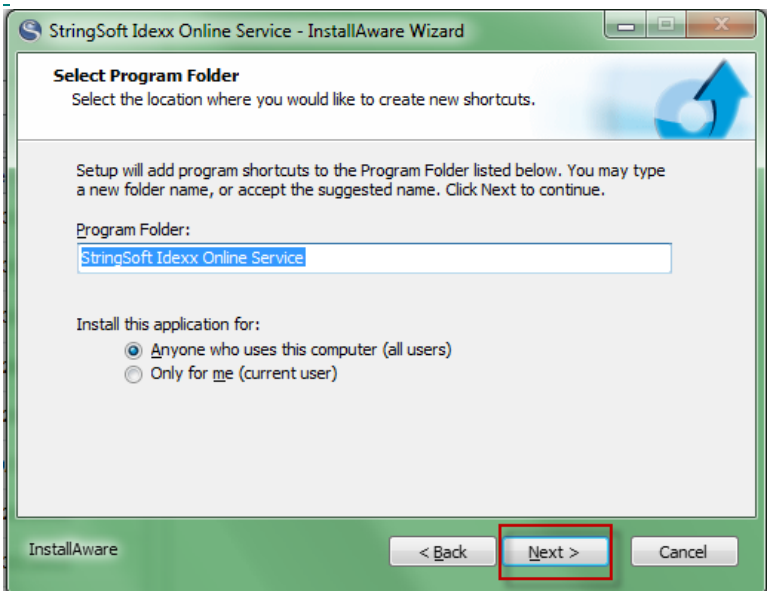


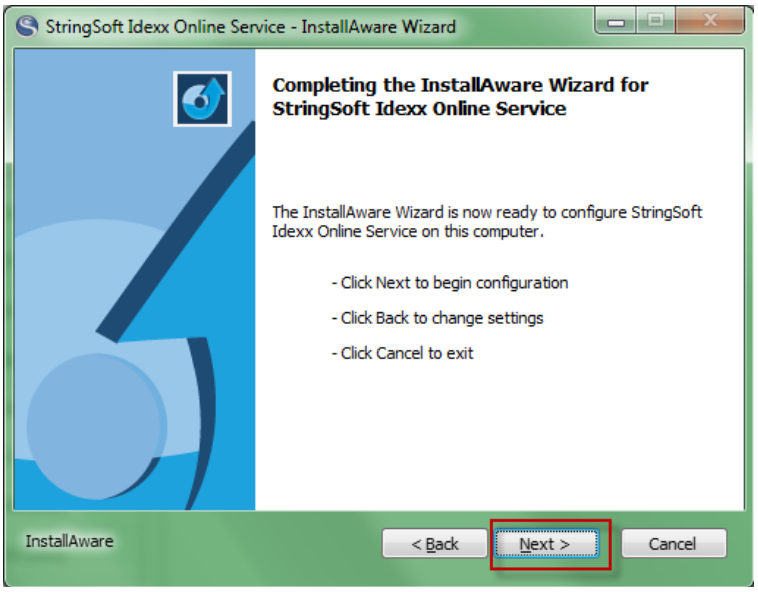


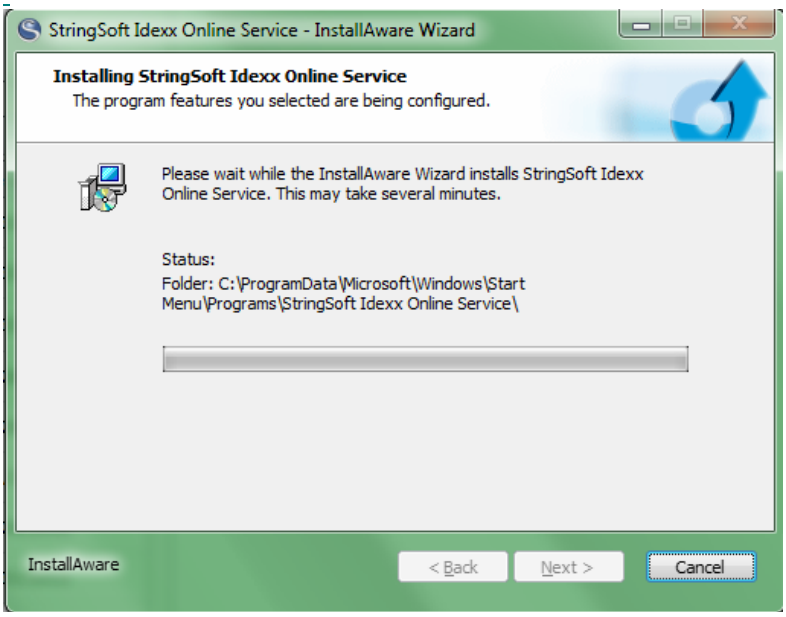

StringSoft Idexx Online Service - InstallAware Wizard
Important Information
Please carefully read the following program information.
Add a readme..rtf or readme.rtf, or readme..txt or readme.txt file to your project as a support file/creative to display it here.
InstallAware
< Back
Next >
Cancel


StringSoft Idexx Online Service - InstallAware Wizard
Customer Registration
Please enter information on yourself.
User Name:
StringSoft
Organization:
StringSoft
InstallAware
< Back
Next >
Cancel

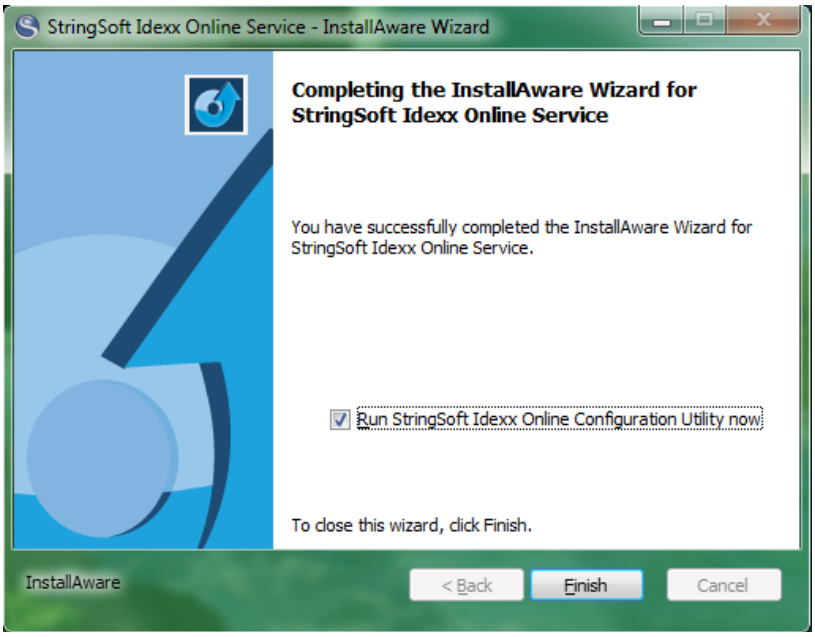

StringSoft Idexx Online Service - InstallAware Wizard
Destination Folder
Select folder where setup will install files.
Install StringSoft Idexx Online Service to:
C:\Program Files (x86)\StringSoft Idexx Online Service
Change...
Destination Folder
Required Disk Space: 19,582 KB
Remaining Disk Space: 598,003 MB
InstallAware
< Back
Next >
Cancel


StringSoft Idexx Online Service - InstallAware Wizard
Select Program Folder
Select the location where you would like to create new shortcuts.
Setup will add program shortcuts to the Program Folder listed below. You may type a new folder name, or accept the suggested name. Click Next to continue.
Program Folder:
StringSoft Idexx Online Service
Install this application for:
Anyone who uses this computer (all users)
Only for me (current user)
InstallAware
< Back
Next >
Cancel

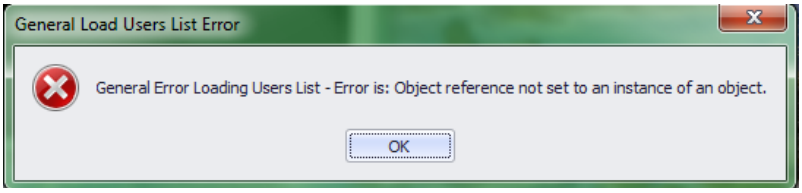


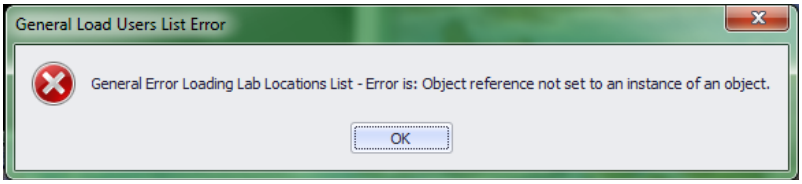


Service is being installed

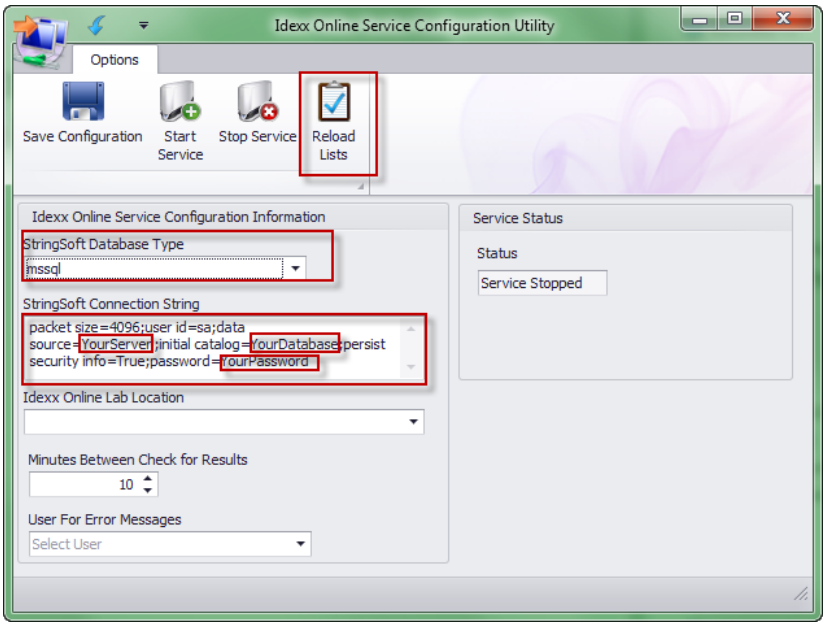


You will get the following – which is normal – JUST click OK





The service configuration utility will pop up to complete



From the dropdown menu select your Database Type
In the StringSoft Connection String – type in your Server, Your database name, and your password for StringSoft (You can also just copy this information from your configuration file in StringSoft folder) (Please contact StringSoft if you need assistance in finding your confirmation file)

Click on Reload list.

From the dropdown under Idexx Online Lab Location, select your lab location
Under Minutes between Check for Results – select the number of minutes between checks (this is the number of minutes between checking for new results)
Under the User for Error Messages – select from the drop down the user who will receive errors if there is an error with the service.
Save Configuration

Once you have saved the configuration – Click on Start Service. (Note: the status to the right will indicate the service started)

Using your exit button - close the screen. Your service is now running.

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 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.

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

StringSoft provides a Group Code for tracking employees, VIPs, military, etc.

To apply the group code:

1. Open the Client Edit screen.
2. In the Client Extended Information section, select the Group Code from the drop-down list.
3. Click **Save**.

There is also a Discount Type for employees, senior citizens, military, etc. You can assign a discount type to the employee, who will then automatically receive a discount on all products and services that are marked discountable.

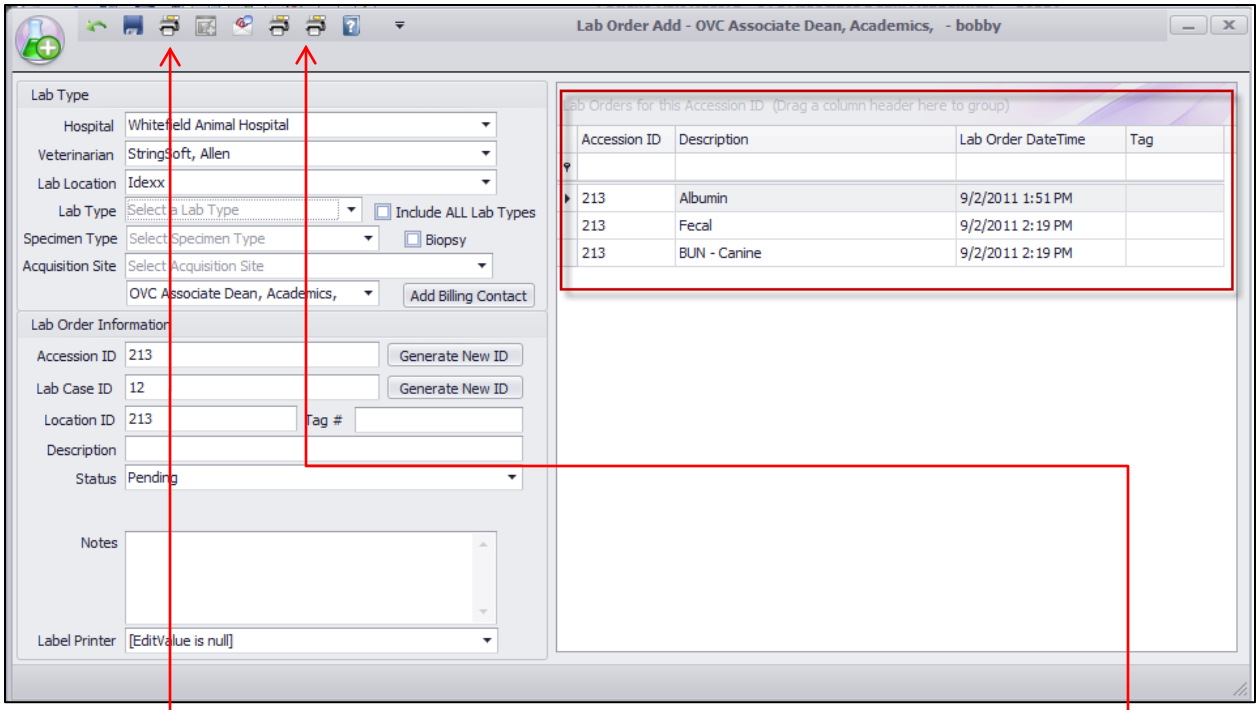
Using VetConnect Services® to create a LabREXX® test requisition

Creating a requisition for individual test orders

From the Medical Record Visit, Lab Orders tab. Click **Add Lab Order**.

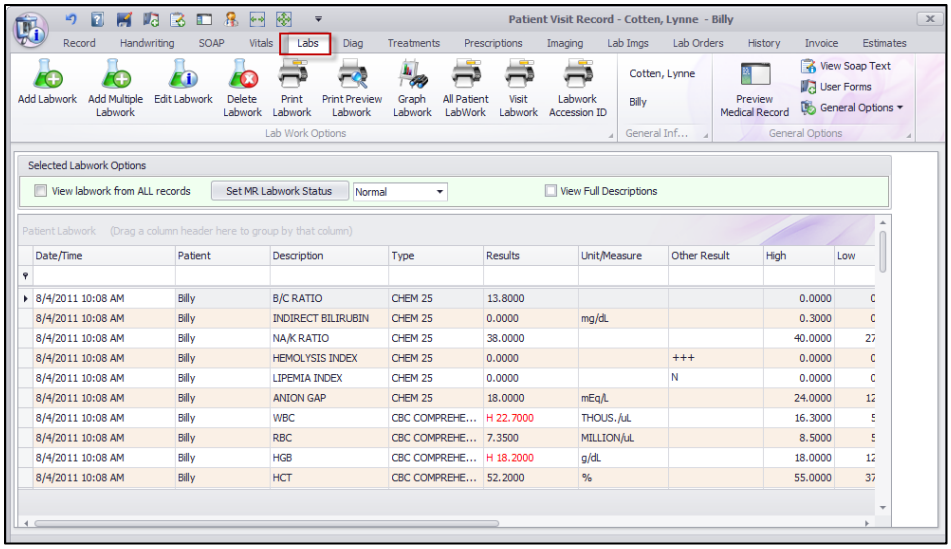
1. Provide the following information:
   - **Hospital**—The hospital field auto populates.
   - **Veterinarian**—The doctor of record is displayed by default. If a different doctor is ordering, select the doctor from the drop-down menu.
   - **Lab Location**—Select the lab location.
   - **Lab Type**—Select the test you want to order.
   - **Specimen Type** (optional)—Select the specimen type.
   - **Acquisition Site**(optional)—Select the acquisition site from the menu, or type in the acquisition site.
   - **Accession ID, Lab Case ID, Location ID**—All values are auto-populated. You can generate new accession and lab case IDs, if you choose to do so.
   - **Description**—Auto-populated, based on the Lab Type ordered.
   - **Status** —Select the status.
   - **Notes**—Add any notes about this test that you want to include with the lab test order. Notes will be printed on the requisition.
2. Click the **SAVE** button .
3. Add any additional tests you want to order, saving after each one.

   ****Note that all tests are now displayed on the RIGHT*****



4. After you have added all of the tests, click the **Print Requisition** button at the top of the Screen . Be sure to include the printed IDEXX requisition form with your samples.
5. Click the **Print Label** button (there are two options: single label and multi-label).
6. After you have printed your requisition and labels, close the screen by clicking the X in the upper right corner.

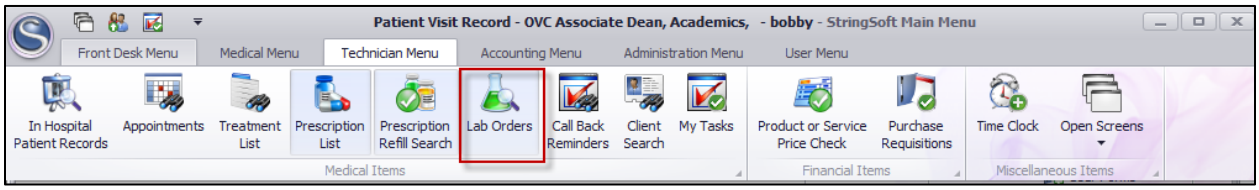
After IDEXX has processed your order, your lab results will be displayed in StringSoft under the Medical Record Visit, Labs tab.



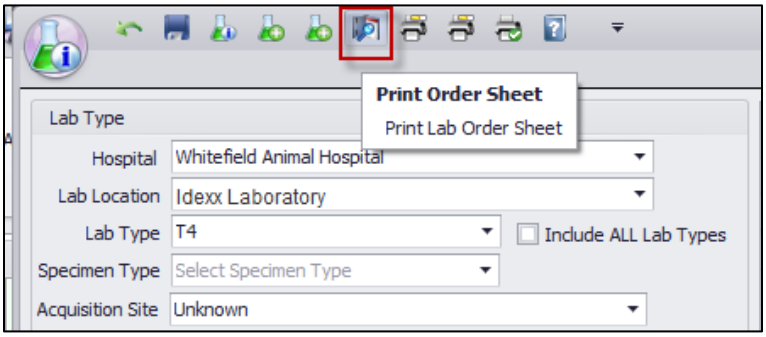
You may also receive an SMS or email indicating that your lab results are available for viewing (depending on your hospital settings and notifications).

Viewing a completed or pending requisition

From the Technician Menu, Lab Orders tab, Opening a Draft LabREXX Requisition.

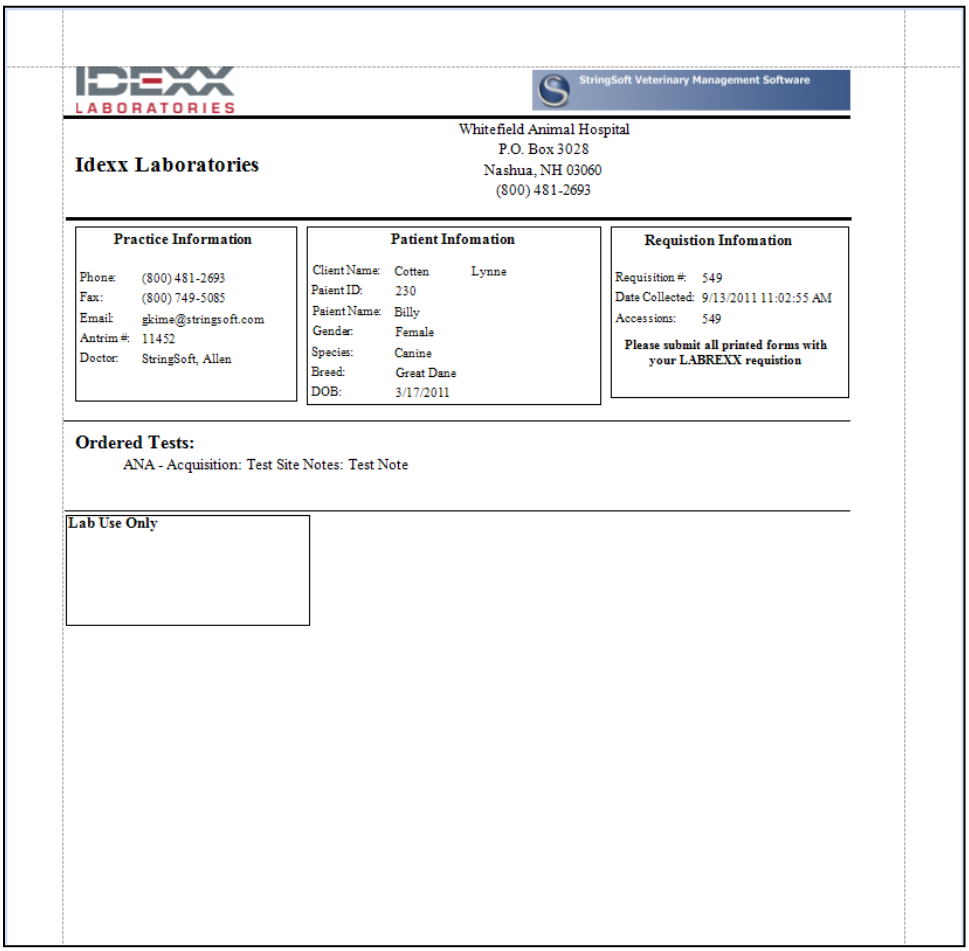


1. Select the lab order you want to reprint from the list, and click **Edit Lab Order**.
2. Click **Print Order Sheet**.



3. Close the screen when finished.

4. Example of a completed IDEXX Test Requisition



IDEXX LABORATORIES

StringSoft Veterinary Management Software

Idexx Laboratories

Whitefield Animal Hospital
P.O. Box 3028
Nashua, NH 03060
(800) 481-2693

Practice Information		Patient Infomation			Requistion Infomation	
Phone:	(800) 481-2693	Client Name:	Cotten	Lynne	Requisition #:	549
Fax:	(800) 749-5085	Paient ID:	230		Date Collected:	9/13/2011 11:02:55 AM
Email:	gkime@stringsoft.com	Paient Name:	Billy		Accessions:	549
Antrim #:	11452	Gender:	Female		**Please submit all printed forms with your LABREXX requistion**	
Doctor:	StringSoft, Allen	Species:	Canine			
		Breed:	Great Dane			
		DOB:	3/17/2011			

Ordered Tests:

ANA - Acquisition: Test Site Notes: Test Note

Lab Use Only

Downloading test results

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

After you have installed the StringSoft/IDEXX service (see Step 5 above); you do not need to do anything else. The IDEXX laboratory test results will be downloaded automatically into the Medical Record visit.