DVMAX® / IDEXX Laboratories Integration User Guide

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Introduction

IDEXX integration technology enables two-way data communication between DVMAX® software and IDEXX VetLab® Station and/or IDEXX Reference Laboratories. Integration improves the flow of information, the pace of work, the quality of medical care, and client loyalty.

- All test results are automatically downloaded into the electronic patient record and consolidated into a single report.
- Missed charges are virtually eliminated.
- You can easily share results with clients to increase understanding and compliance.

To integrate your DVMAX software with IDEXX services, contact your IDEXX Sales Connectivity Consultant (1-877-256-8457) or DVMAX Technical Support (1-800-950-5455).

This document explains how to set up and start using the IDEXX in-house and reference laboratory diagnostics integrated with DVMAX software.

IDEXX and DVMAX® Integration Requirements

Your practice must have the following:

- Internet access on all computers used to create test orders and view lDEXX laboratory results.
- An IDEXX VetConnect® account. Instructions for obtaining an account are in Appendix A.
- DVMAX software version 8.0 or later.
- Your practice's laboratory billing codes entered into your DVMAX software.

For integration with your IDEXX in-house equipment, you must also have the following:

- IDEXX VetLab® Station connected to your DVMAX practice network.
- IDEXX SmartService® solutions activated on your IDEXX VetLab Station.
- A DVMAX client workstation with a static network IP address dedicated to the IDEXX VetLab Station.

Instructions for implementing all three requirements are in Appendix A.

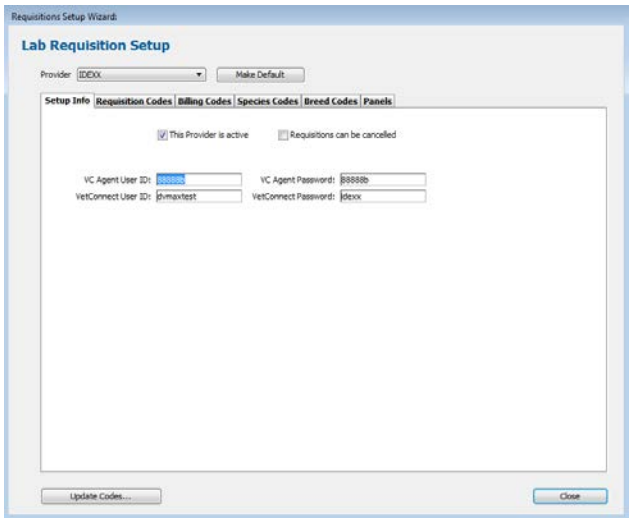
Setting Up Integration with IDEXX Reference Laboratories

Integration requires four steps:

- Download IDEXX test codes
- Link IDEXX test codes to DVMAX billing codes
- Configure result download options
- (optional) Enable discounts for staff pets

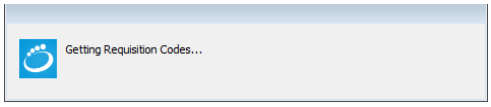
To download IDEXX test codes:

1. Within DVMAX software, go to **Section> General Management**.
2. Select the **Utilities** tab.
3. Choose **Requisitions Setup Wizard**, and then click **OK**.
4. Select **IDEXX** from the Provider drop-down list.
5. Verify that the **This Provider is active** box is checked.
6. Enter your VC Agent and VetConnect credentials.



7. Click **Update Codes**, and then click **OK** to confirm the update request.

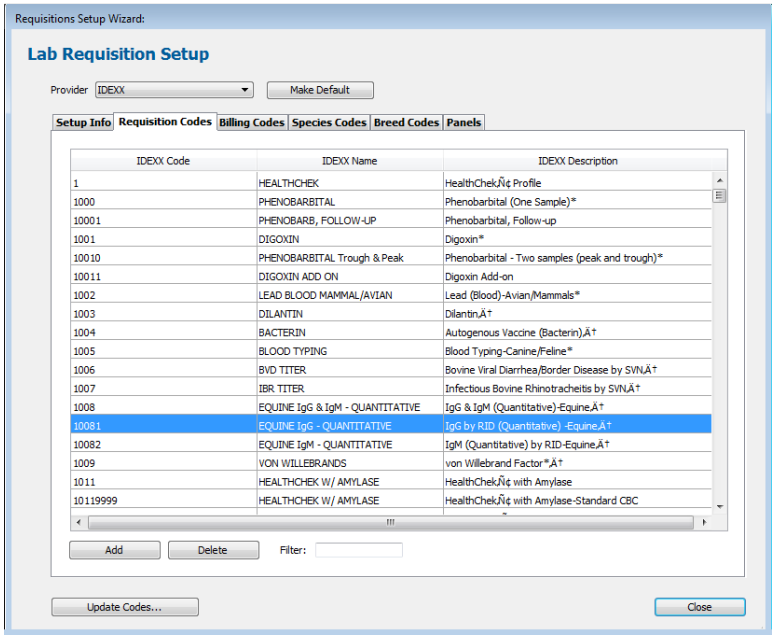
   IDEXX test codes, breeds, and species are imported into the DVMAX software.



   Importing the codes may take a few moments. When done, the status window will either show a list of imported changes or will close.

   Note: If you receive an alert stating 'No codes retrieved from IDEXX," verify that your logon credentials are correct, and try again. (See Appendix A for information on obtaining your credentials.)

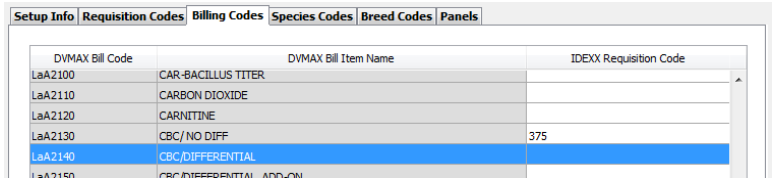
8. Select the **Requisition Codes** tab, and verify that IDEXX tests are listed, as shown below.



9. Continue with the following procedure to link the codes.

To link DVMAX billing codes with IDEXX test codes:

1. Select the **Billing Codes** tab of the Requisitions Setup Wizard.



Note: Billing codes are created by your practice. If the Billing Codes tab is empty, your practice must create the codes within the DVMAX software to use IDEXX Integration.

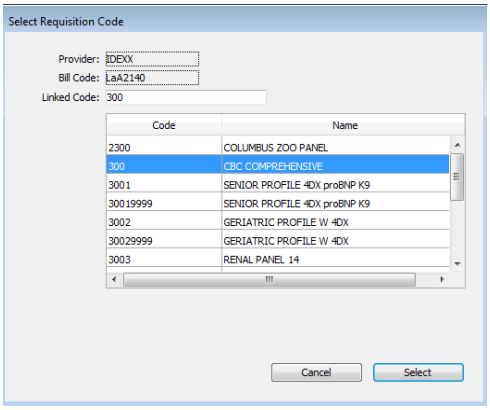
2. Double-click the desired DVMAX code.

   The Select Requisition Code box opens.

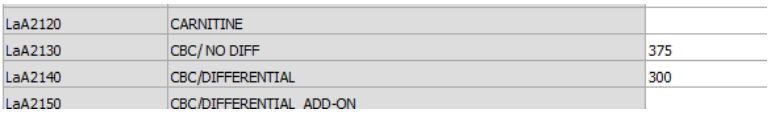
3. Link an IDEXX test to the DVMAX code either of these ways:

   - Type the IDEXX code in the Linked Code field.
   - Scroll through the IDEXX test names and click the test name to highlight it.

4. Click **Select** to associate this test to the billing code in DVMAX.



The line item now displays the associated IDEXX Requisition Code.



LaA2120	CARNITINE	
LaA2130	CBC/ NO DIFF	375
LaA2140	CBC/DIFFERENTIAL	300
LaA2150	CBC/DIFFERENTIAL ADD-ON	

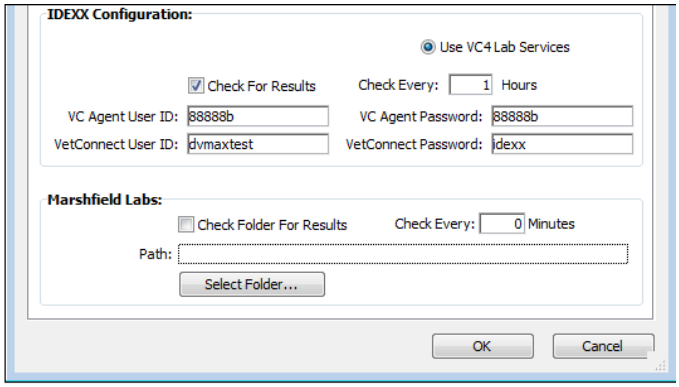
5. Review the **Species Codes** and **Breed Codes** tabs, and then link DVMAX codes to IDEXX codes as needed.

   Note: Not all species or breeds included in the DVMAX software will have testing available at IDEXX Reference Laboratories.

6. Leave the Panels tab as is; the Panels tab does not apply to IDEXX Reference Laboratories.
7. When done, click **Close**.

To configure result download options:

1. In the DVMAX software, go to **File> Preferences.**
2. Select the **Lab Result Setup** tab.
3. In the **IDEXX Configuration** section, specify in whole numbers how often the DVMAX software should check for new results. The default is 1 hour.



4. Enter your VCAgent and VetConnect credentials.
5. Click **OK**.
6. Restart the DVMAX software to implement the settings.

DVMAX software is now integrated with IDEXX Reference Laboratories.

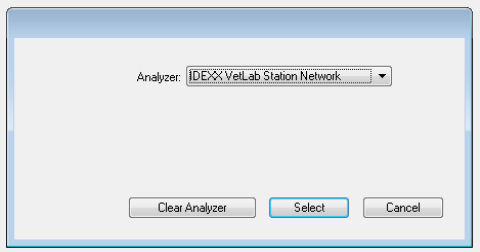
Setting Up Integration with IDEXX VetLab® Station

Integration requires four steps:

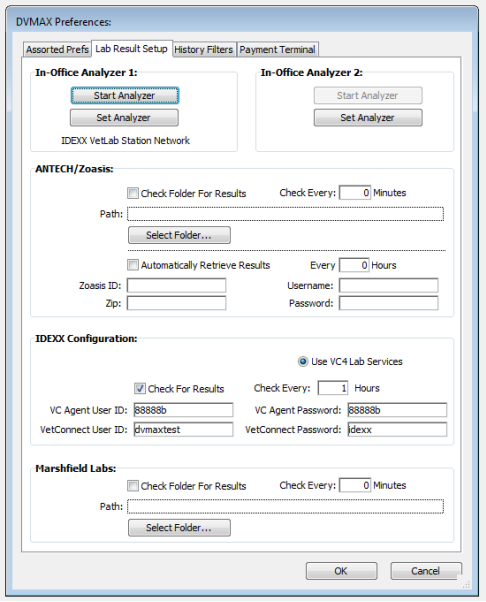
- Configure analyzer settings
- Configure the IDEXX VetLab Station
- Download IDEXX test codes
- Link IDEXX test codes to DVMAX billing codes

To configure analyzer settings:

1. In DVMAX software, go to **File> Preferences**.
2. Select the **Lab Result Setup** tab.
3. In an available In-Office Analyzer section, click **Set Analyzer**. (The analyzer section is available if there is no analyzer name under the buttons.)
4. In the **Analyzer** drop-down list, select **IDEXX VetLab Station Network**.



5. Click **Select**. IDEXX VetLab Station Network is now listed under the analyzer buttons at the top of the window.



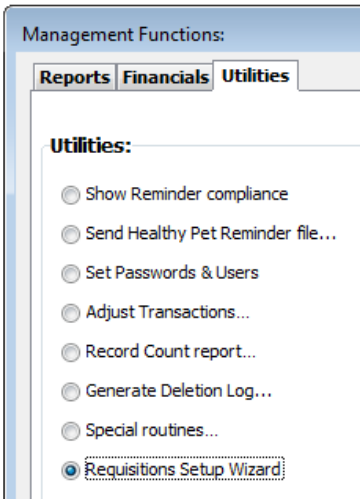
6. Keep the **DVMAX Preferences** window open on your workstation, and continue with the next procedure.

To configure the IDEXX VetLab Station:

1. On the IDEXX VetLab Station, tap **Settings**, and then tap the **Practice Management** tab.
2. Tap **Other, Network**.
3. Read the **IDEXX Connection Agreement** and tap **I agree**.
4. Tap **OK**.
5. Select **Direct Connect**, and enter the network IP address for your DVMAX workstation. (See Appendix A for assistance in locating the network IP address).
6. Tap **Yes** to confirm and save your settings.
7. On the DVMAX workstation, in the DVMAX Preferences window, click the **Start Analyzer** for the IDEXX VetLab Station Network.

   Note: A DVMAX icon appears on the Home Screen of the IDEXX VetLab Station within a few moments. If the icon does not appear, restart the IDEXX VetLab Station.
8. Tap the **DVMAX** icon.
9. Verify that the feature is set to **ON (Transmit Results)**.
10. Tap **Home**; if asked to save settings, choose **Yes**.
11. On the DVMAX workstation, click **Close** to close the DVMAX Preferences window.

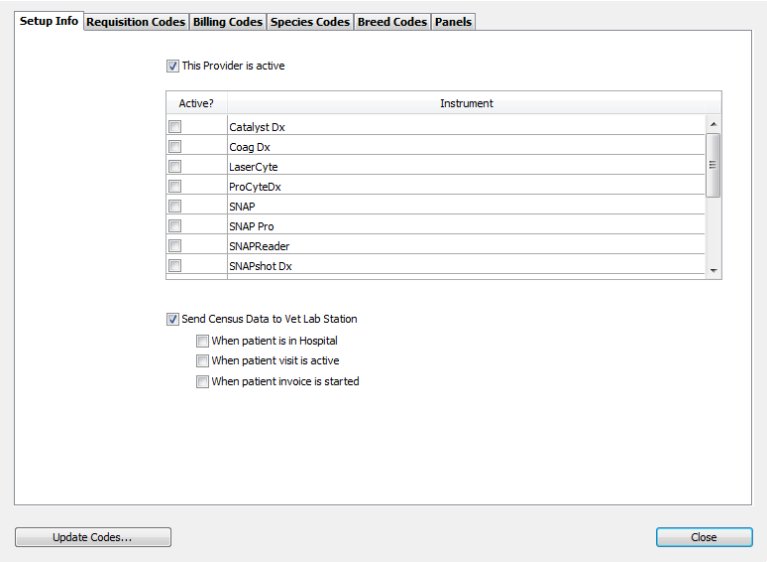
To download test codes:



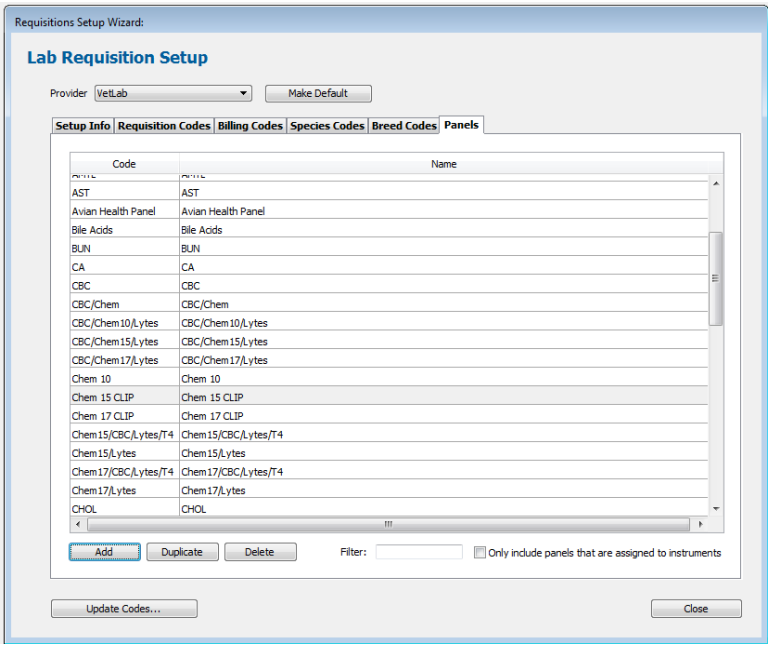
1. Within DVMAX, go to **Section> General Management**.
2. Select the **Utilities** tab.
3. Choose **Requisitions Setup Wizard** and click **OK**.
4. Select **VetLab** from the Provider drop-down list.
5. Verify that the **This Provider is active** box is checked.
6. Click **Update Codes**, and then click **OK** to confirm the update request.
   - IDEXX test codes, breeds, and species are imported into the DVMAX software.
   - This process may take a few moments. When the update is done, the screen may refresh and a list of instruments appears in the Setup Info tab.
7. Check the box next to each instrument connected to your IDEXX VetLab Station.
8. To have the DVMAX software send information to populate the Census List, check the **Send Census Data to VetLab Station** box.

   Note: The Census List lets you select patients on the IDEXX VetLab Station without a test request from DVMAX software. Test results are returned to the patient's record, but will require reconciliation. Contact DVMAX Customer Support for assistance reconciling patient results.

9. The options below this setting specify when a patient is visible in the Census List—check the boxes applicable to your practice.

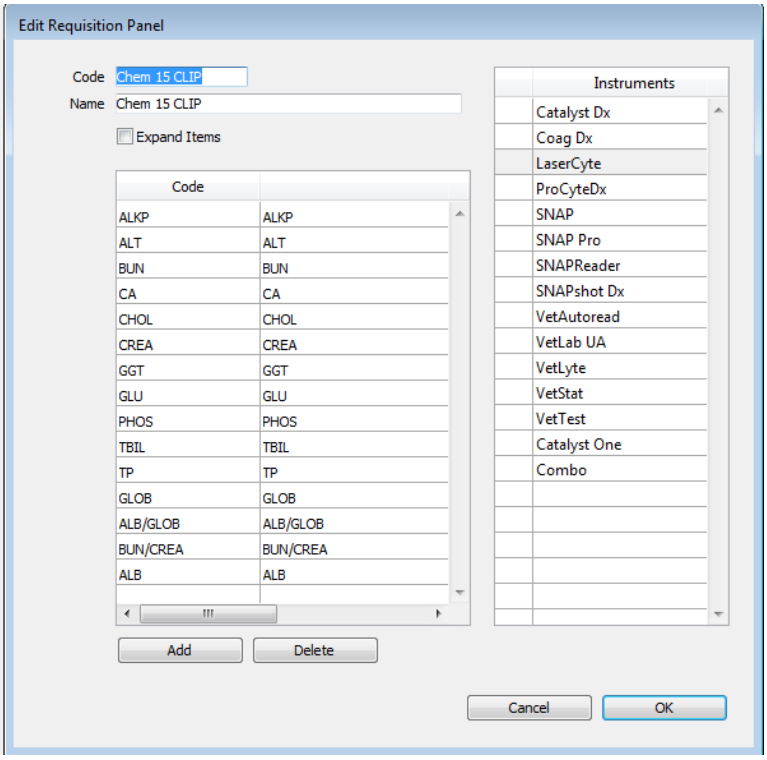


10. Select the **Panels** tab.



Standard Panels available with the IDEXX VetLab Station are included in DVMAX.

11. Double-click an item to view or edit the components of a panel and its assigned instruments.



Note: Practice-specific panels can be created in the DVMAX software to meet the needs of your customers. For assistance creating specialized panels, contact DVMAX customer support.

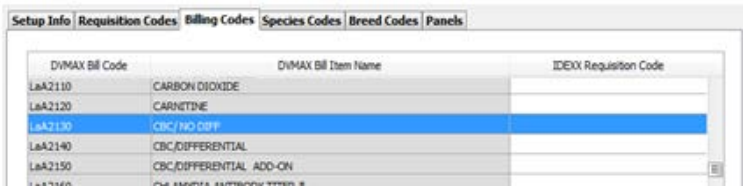
12. Continue with the following procedure to link the codes.

To link billing codes:

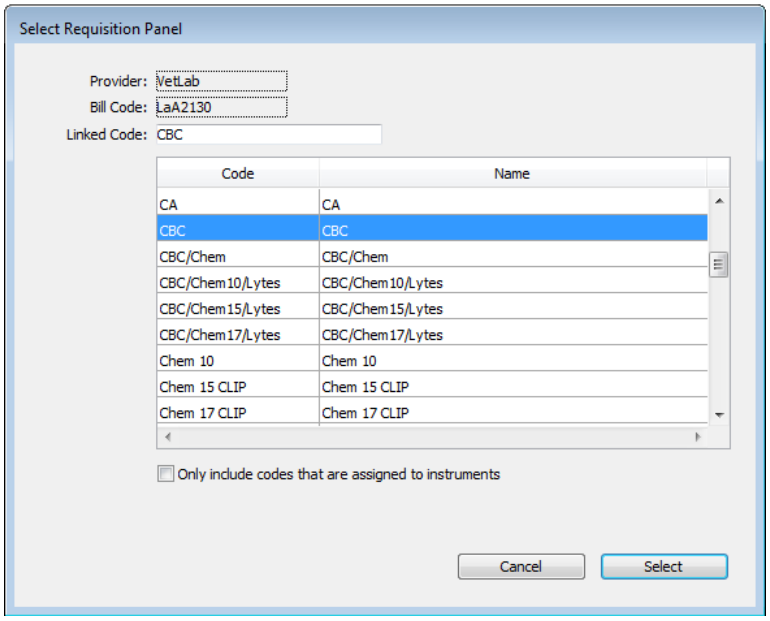
1. Select the **Billing Codes** tab.

   Note: Billing codes are created by your practice. If the Billing Codes tab is empty, your practice must create the codes.

2. Double-click the desired DVMAX Billing Code.



3. Locate the VetLab Requisition Code that matches the billing code either of these ways:
   - Type the IDEXX code in the **Linked Code** field.
   - Scroll through the IDEXX test names and click the test name to highlight it.



4. Click **Select** to associate this test with the billing code. The line item on the Billing Codes tab now displays the associated IDEXX VetLab requisition code.

5. Review the **Species Codes** and **Breed Codes** tabs, and link DVMAX codes to IDEXX codes as needed.

   Note: Not all species or breeds included in the DVMAX software will have tests available at IDEXX VetLab Station instruments.

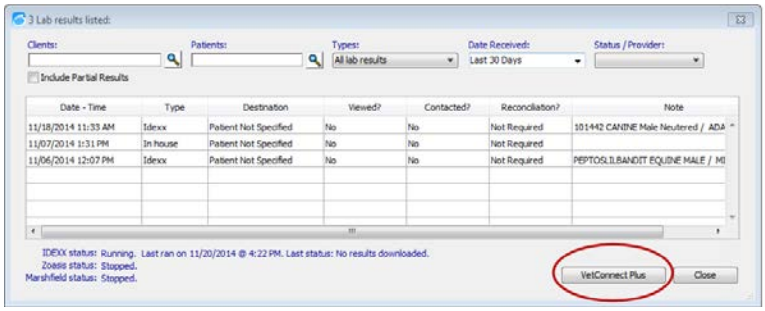
6. When done, click **Close**.

Setting Up Integration with VetConnect® PLUS

IDEXX VetConnect PLUS is a web-based solution for retrieving and viewing test results in real-time from IDEXX Reference Laboratories and IDEXX VetLab Station.

To activate your VetConnect PLUS account:

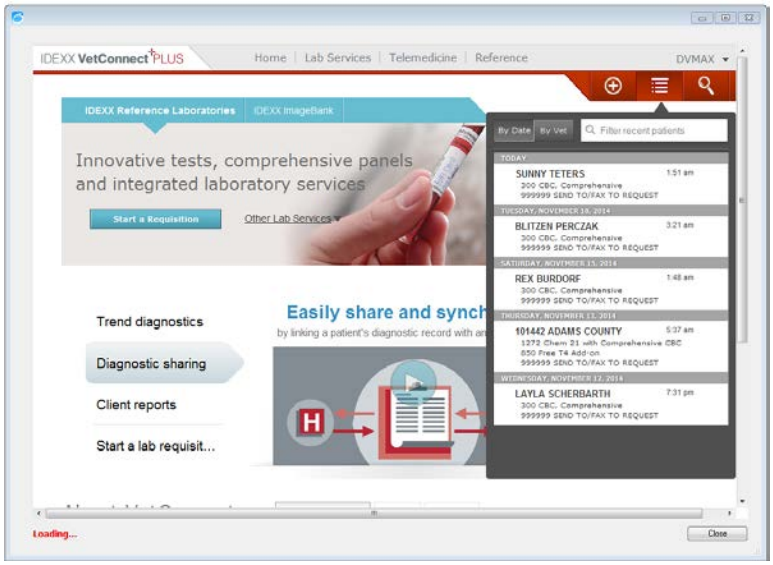
1. In the Command palette, select **Labs**.
2. In the Lab Results window, click **VetConnect PLUS** in the lower right corner of the window.



If this is the first time you've visited VetConnect PLUS on this computer, you are prompted to activate your account.

3. Click **Activate VetConnect PLUS**.

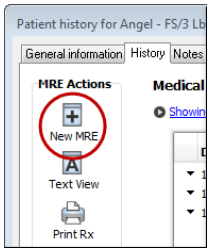
The VetConnect PLUS home page opens. IDEXX test results that were run within the last 7 days are available to view on the right. For assistance with the VetConnect PLUS website, contact IDEXX Customer Support at 1-800-248-2483.



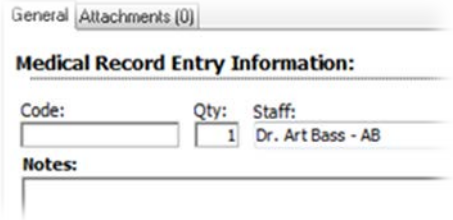
Ordering IDEXX Tests within DVMAX Software

To order a test:

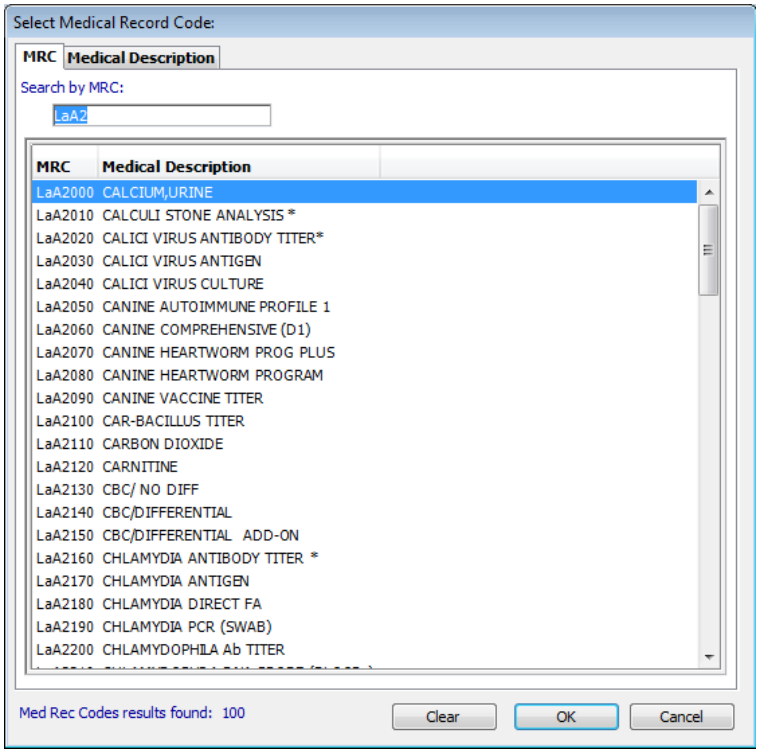
1. Open the patient record, and then select the **History** tab and provider.
2. Click **New MRE**.



3. In the **Code** box, enter either the DVMAX billing code or the description, and press **Enter**.



Tip: If more than one test matches your entry, the **Select Medical Record Code** window opens. Find the code and click **OK**.



4. Enter **Notes** for the requisition, if applicable.
5. Verify that the correct staff member is selected, and then click **OK**.

   The test entry is added to the Patient History.

   The Laboratory Requisitions popup window opens and displays the requested test. Add-on testing, if available, is indicated as a link below the Staff drop-down list.
6. To add another test to the same requisition, repeat **steps 2–5**.
7. Click **Submit** in the Laboratory Requisitions window.

   For reference laboratory tests, the requisition is printed at your DVMAX printer.

   For in-house tests, the order is sent to the IDEXX VetLab Station.

To view completed or pending requisitions:

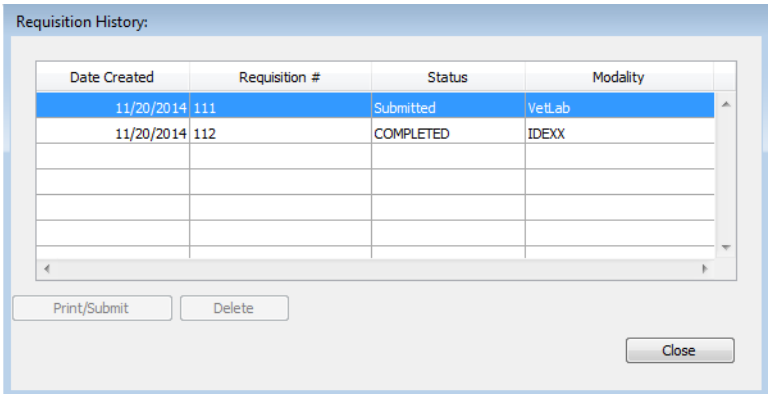
1. Open the patient record, and then select the **History** tab and provider.
2. Click **View Requisition History** at the bottom of the History tab.

   The Requisition History includes laboratory submissions for this patient, whether reference laboratory or in-house.
3. Note the test status:

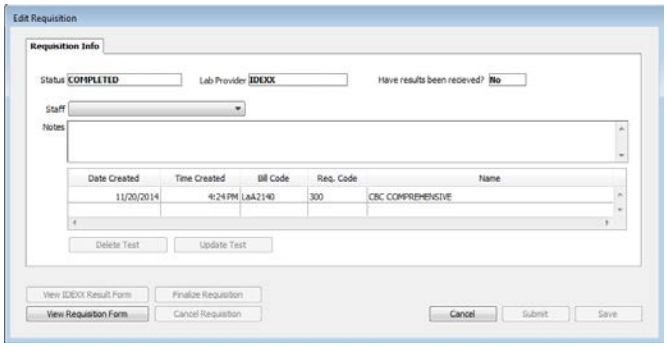
   Open: The request has not been submitted; you can still edit the test order.

   Submitted: The test request has been submitted to the IDEXX VetLab Station. This status applies to IDEXX VetLab Station only.

   Completed: Either the reference laboratory form has been finalized, or results have been returned from the IDEXX VetLab Station



4. To view the request details, double-click the line item. The Edit Requisition window opens.



5. To view or reprint an IDEXX Reference Laboratories requisition, click **View Requisition Form**. The form opens as a PDF file.

6. To delete an in-house request, click **Cancel** to return to Requisition History, highlight the line item to be removed, and click **Delete**.

   Note that this does not affect billing. Adjust the invoice accordingly.

Viewing IDEXX Diagnostic Results within DVMAX Software

Test results are automatically downloaded from IDEXX Reference Laboratories and IDEXX VetLab Station.

You can access these results from multiple locations in DVMAX. The most comprehensive way is to use the Labs section of the Command Palette.

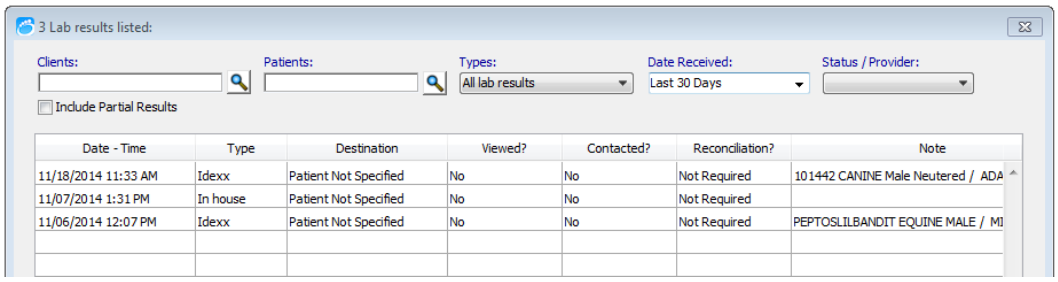
To view test results:

1. In the Command palette, select **Labs.**

   The Lab Results window displays all lab results imported today, not including partial results.

2. (Optional) Filter results using the boxes at the top of the Lab Results window.

   Note: If the Destination column says Patient Not Specified, you must manually assign the result to a patient record. See the next section.



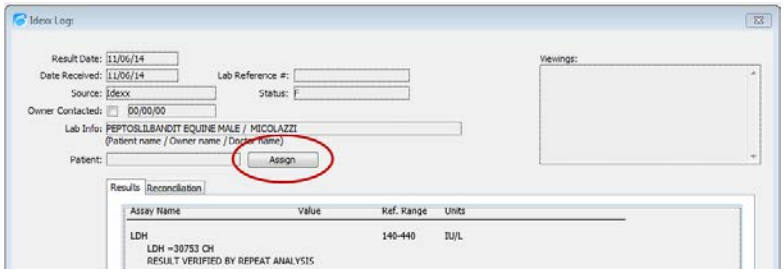
3. Click **Close**.

To manually assign patient results:

1. Within the Lab Results window, double click the line item.

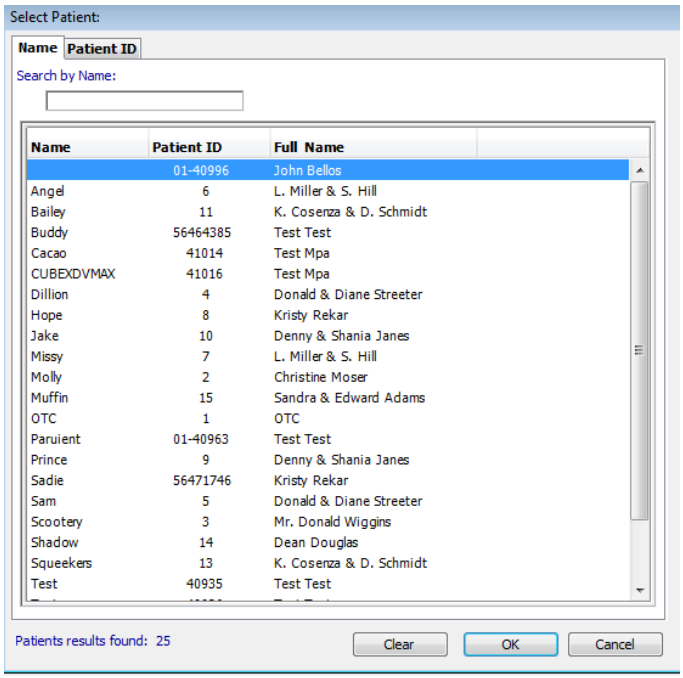
   A log window displays the test result.

2. Click **Assign**.



3. In the Select Patient window, search for the patient by name or ID.

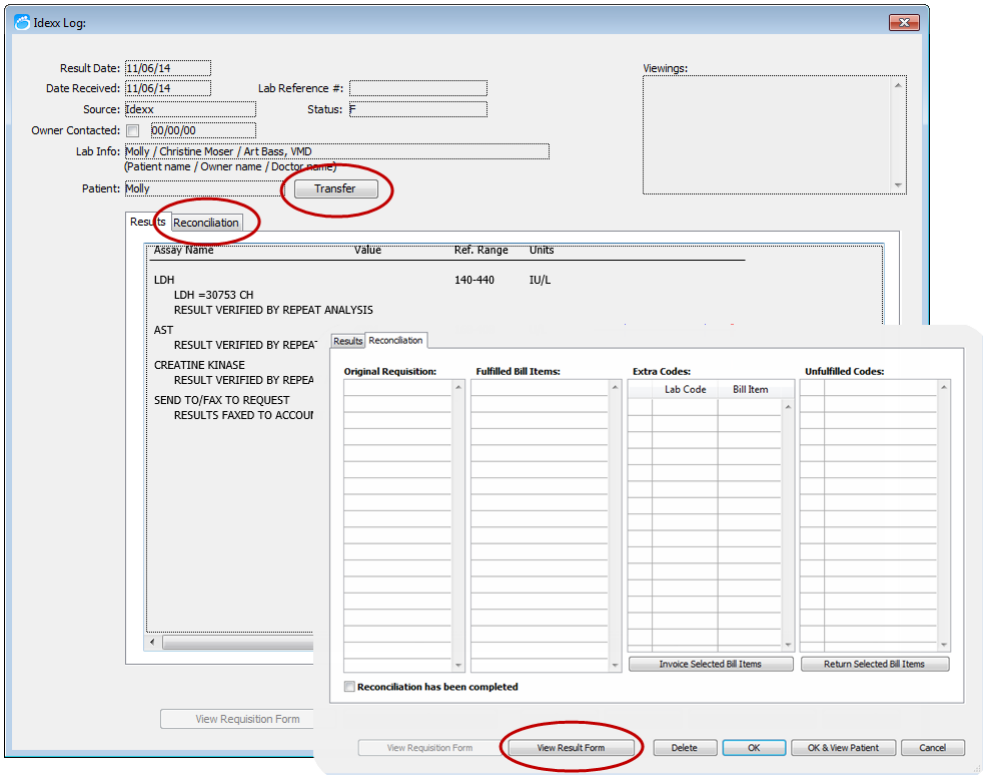
4. Select the patient, and click **OK**.



Note: You may be required to enter a **DVMAX Staff Code** to confirm the assignment. If the staff code is unknown, the result will not be assigned to the selected patient.

The log window is updated with the new patient information.

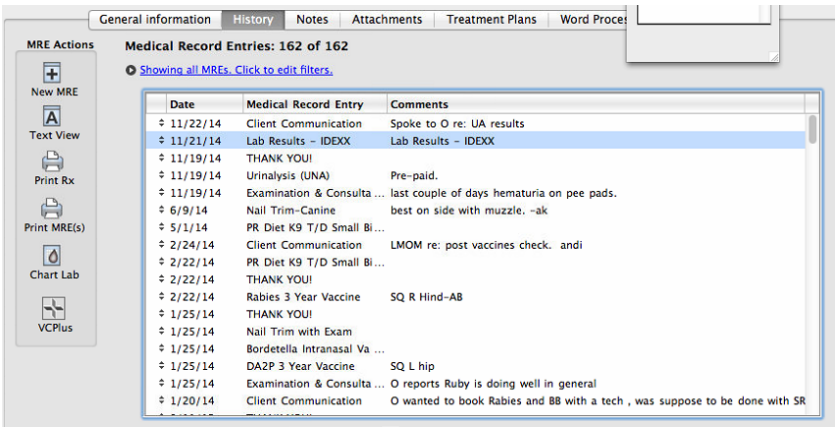
5. Select the **Reconciliation** tab to reconcile charges for not-requested tests.



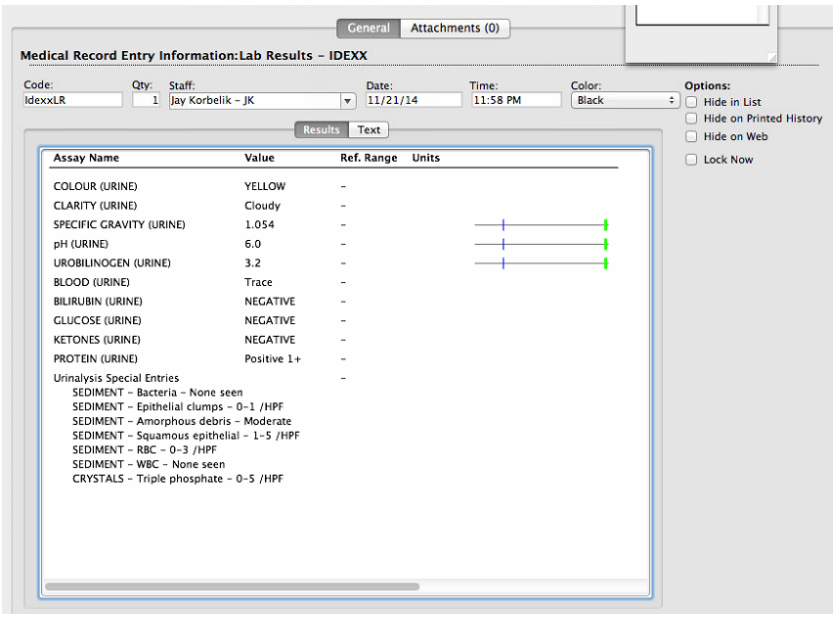
6. Select **View Result Form** to view the PDF report from IDEXX.
7. Select **Transfer** to move the results into the patient's Medical Record.
8. To view results within the patient record, click **OK & View Patient**.

To view results within the patient record:

1. Open the patient record, and then select the **History** tab and provider. Results are listed by request date.



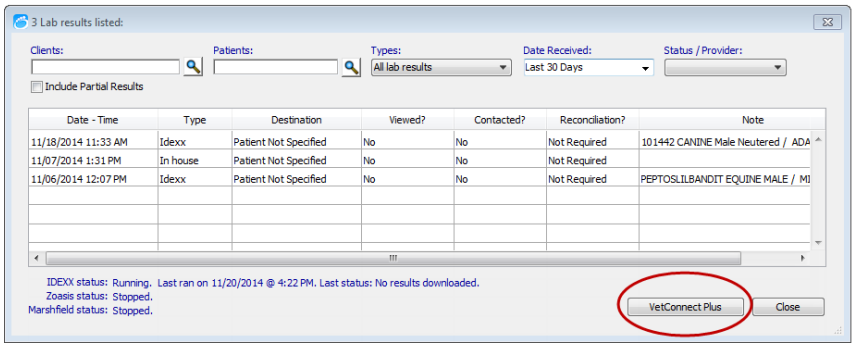
2. Double click the history entry to see the results.



Viewing IDEXX Results in VetConnect PLUS

To open VetConnect PLUS from the Lab Results window:

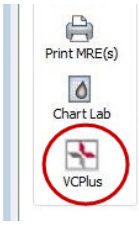
1. In the Command palette, select **Labs**.
2. In the Lab Results window, click **VetConnect PLUS** in the lower right corner of the window.



3. Select a test result on the right side of the VetConnect PLUS window.

To open VetConnect PLUS from the patient record:

1. Open the patient record, and then select the **History** tab and provider.
2. Click the **VCPlus** icon on the left.



A window displays the current patient's VetConnect PLUS record.

Note: DVMAX software links your patients to VetConnect PLUS automatically over time as results are received. If the VCPlus icon is black instead of red, the link has not been established; clicking the VCPlus icon opens the VetConnect PLUS home page.

To learn more about VetConnect PLUS:

Visit vetconnectplus.com or idexxlearningcenter.com.

Customer Support

DVMAX Customer Support:

1-800-950-5455

IDEXX Laboratories Customer Support:

IDEXX Reference Laboratories: 1-888-433-9987

IDEXX in-house diagnostics: 1-800-248-2483

Appendix A

Requesting a VetConnect PLUS Account

To use VetConnect PLUS services through DVMAX software, your practice must have a VetConnect PLUS account. If your practice does not already have VetConnect credentials, contact IDEXX 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 email vccanada@idexx.com.

Ask customer support to set up a VetConnect account for you. Be prepared to provide the following information to a support representative:

1. Your IDEXX 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. You will need these in order 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.

Activating IDEXX SmartService® Solutions on Your IDEXX VetLab Station

The IDEXX VetLab Station must have IDEXX SmartService solutions installed. IDEXX SmartService Solutions is an Internet-based customer support and service tool from IDEXX Laboratories. It allows specially trained IDEXX staff to troubleshoot and resolve many instrument issues to save you time, increase your instrument uptime, and improve practice efficiency. It's like having IDEXX Technical Support right in your clinic. You can contact IDEXX Laboratories directly at **1-800-755-4033** to request IDEXX SmartService activation.

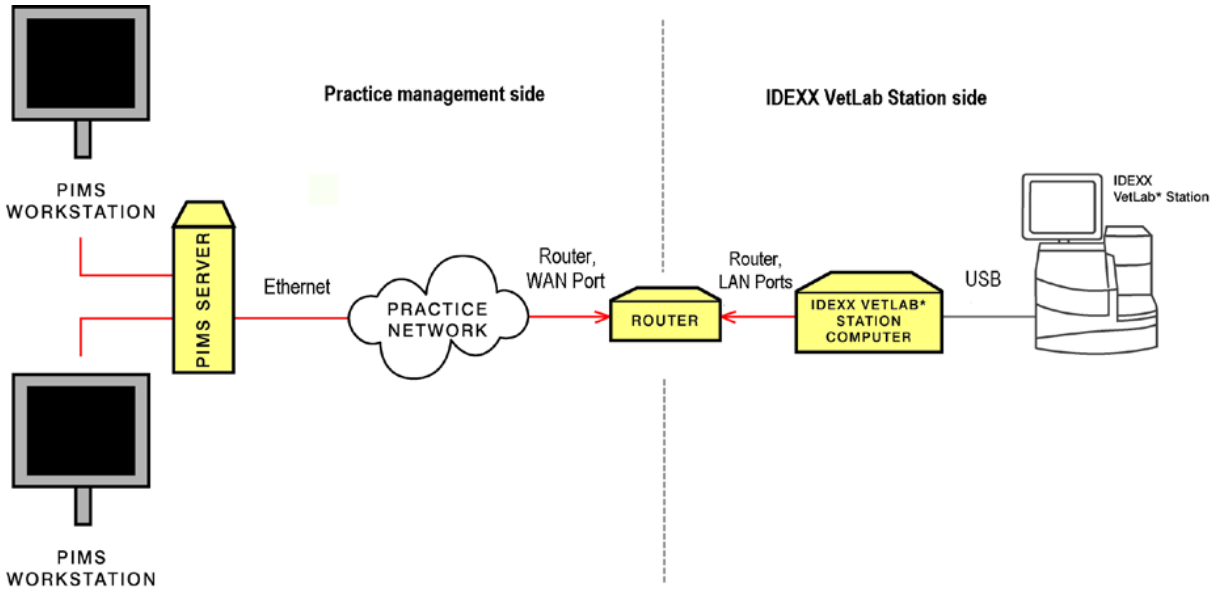
Setting a DVMAX Workstation to a Static Network IP Address

Although not required, IDEXX recommends that you have a static or manual IP address set on the workstation designated to connect your DVMAX software to the IDEXX VetLab Station. Each practice has unique requirements and may not be able to meet the static IP recommendation.

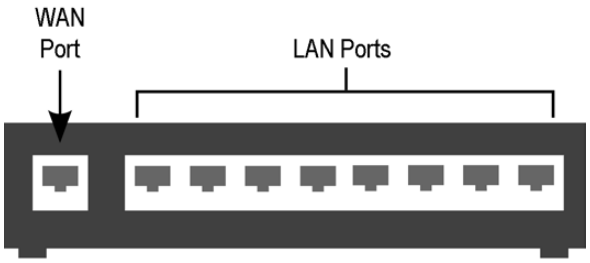
Please consult with your practice IT or computer professional to identify the best resolution for your practice.

Connecting the IDEXX VetLab Station to Your DVMAX Network

The following diagram illustrates a practice network with the IDEXX connection enabled. The practice management side of the LAN connects to the IDEXX VetLab Station through the IDEXX router.



IDEXX router connections



IDEXX router

The practice management side of the clinic's network must connect to the **WAN** port of the IDEXX router.

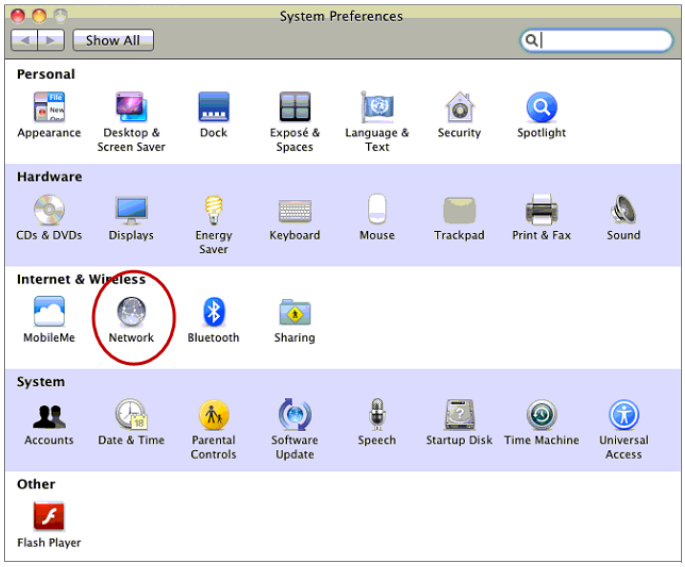
The IDEXX VetLab Station and analyzers must connect to the **LAN ports** of the IDEXX router. (The individual analyzers can also be connected directly to the IDEXX VetLab Station computer.)

When you install or activate the connections, IDEXX will provide a router for the IDEXX VetLab Station and will ensure that the connection between the router and the network functions correctly.

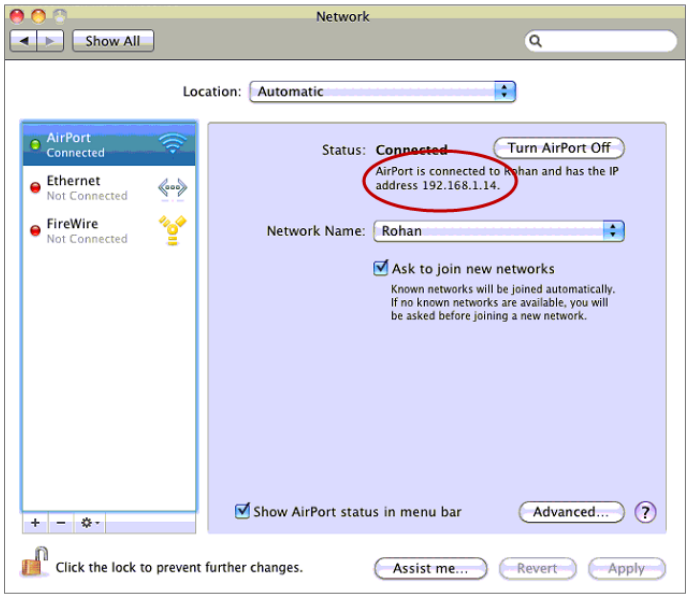
To find the DVMAX Client IP address:

Macintosh computer:

1. Click the **Apple** menu, and choose **System Preferences**.



2. Click **Network** to access network connections.
3. Select the connection on the left that is labeled in green.



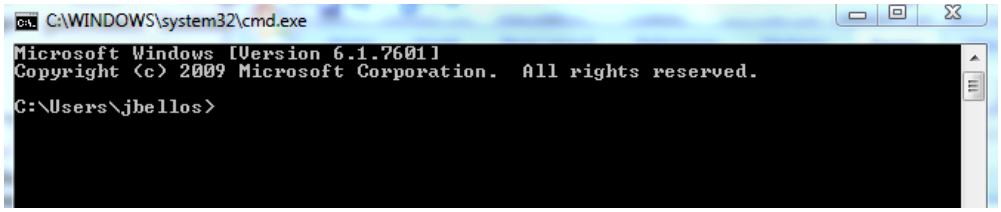
4. On the right, note the **IP address** for this computer.

   This address will be needed when configuring the IDEXX VetLab Station for a Direct Connect Network connection to DVMAX.

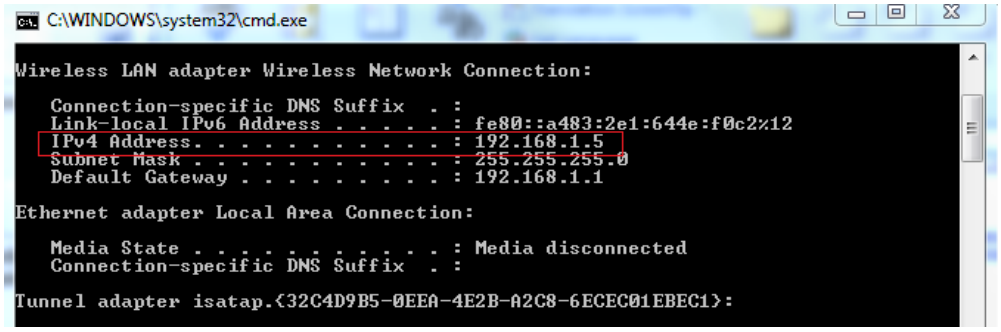
Windows® operating system:

1. Go to the Start menu at the lower left corner of the desktop, type **CMD**, and then press **Enter**.

   A black window opens; this is the **Command Prompt**.



2. Type **IPCONFIG** and press **Enter**.



3. Note the **IPv4 Address** in the list.

   You will need this address when you configure the IDEXX VetLab Station for a direct network connection to DVMAX software.