

# DVMAX<sup>®</sup> / IDEXX Laboratories Integration User Guide

---



### **Proprietary information**

© 2015 IDEXX Laboratories, Inc. All rights reserved. • 106318-01

DVMAX, IDEXX SmartService, IDEXX VetLab, and VetConnect are trademarks or registered trademarks of IDEXX Laboratories, Inc. or its affiliates in the United States and/or other countries. All other product and company names and logos are trademarks of their respective holders. The IDEXX Privacy Policy is available at [idexx.com](http://idexx.com).



## Table of Contents

Introduction .....	4
IDEXX and DVMAX Integration Requirements.....	5
Setting up Integration with IDEXX Reference Laboratories .....	6
Setting Up Integration with IDEXX VetLab Station .....	13
Setting up Integration with IDEXX VetConnect® PLUS.....	19
Ordering IDEXX Tests within DVMAX Software .....	21
Viewing IDEXX Diagnostic Results within DVMAX Software .....	31
Viewing IDEXX Results in VetConnect PLUS .....	34
Customer Support .....	36
Appendix A.....	37
Requesting a VetConnect PLUS Account .....	37
Activating IDEXX SmartService® Solutions on Your IDEXX VetLab Station .....	37
Setting a DVMAX Workstation to a Static Network IP Address.....	37
Connecting the IDEXX VetLab Station to Your DVMAX Network .....	38
IDEXX Requisition Form .....	41

## 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. Clinics on v8.6 or higher can also take advantage of integrated IDEXX Reference Laboratory ordering.

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.

- 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

## IDEXX and DVMAX® Integration Requirements

Your practice must have the following:

1. Internet access on all computers used to create test orders and view IDEXX laboratory results through the IDEXX VetConnect PLUS integration.
2. An IDEXX VetConnect® account. Instructions for obtaining an account are in Appendix A.
3. DVMAX software version 8.0 or later. \*VetConnect PLUS Ordering requires DVMAX v8.6 or later.
4. Your practice's laboratory billing codes entered into your DVMAX software and linked to IDEXX lab codes. (See Setting Up Integration sections for instructions on linking bill codes to IDEXX lab codes).

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 five steps:

1. Download IDEXX test codes
2. Create DVMAX billing codes, if they don't already exist
3. Link IDEXX test codes to DVMAX billing codes
4. Configure result download options
5. (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.

Label	LIMS Account

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.

The screenshot shows the 'Requisitions Setup Wizard' window. At the top, the title is 'Requisitions Setup Wizard'. Below the title bar, the window is titled 'Requisition Setup'. There is a 'Provider' dropdown menu set to 'IDEXX' and a 'Make Default' button. Below this, there are several tabs: 'Setup Info', 'Requisition Codes' (which is selected and highlighted in blue), 'Billing Codes', 'Species Codes', 'Breed Codes', and 'Panels'. The main content area contains a table with three columns: 'IDEXX Code', 'IDEXX Name', and 'IDEXX Description'. Below the table is a 'Filter:' input field. At the bottom of the window, there is an 'Update Codes...' button on the left and a 'Close' button on the right.

IDEXX Code	IDEXX Name	IDEXX Description
1	HEALTHCHEK	HealthChek, Ñc Profile
1000	PHENOBARBITAL	Phenobarbital (One Sample)*
10001	PHENOBARB, FOLLOW-UP	Phenobarbital, Follow-up
1001	DIGOXIN	Digoxin*
10010	PHENOBARBITAL Trough & Peak	Phenobarbital - Two samples (peak and trough)*
10011	DIGOXIN ADD ON	Digoxin Add-on
1002	LEAD BLOOD MAMMAL/AVIAN	Lead (Blood)-Avian/Mammals*
1003	DILANTIN	Dilantin, Å†
1004	BACTERIN	Autogenous Vaccine (Bacterin), Å†
1005	BLOOD TYPING	Blood Typing-Canine/Feline*
1006	BVD TITER	Bovine Viral Diarrhea/Border Disease by SVN, Å†
1007	IBR TITER	Infectious Bovine Rhinotracheitis by SVN, Å†
1008	EQUINE IgG & IgM - QUANTITATIVE	IgG & IgM (Quantitative)-Equine, Å†
10081	EQUINE IgG - QUANTITATIVE	IgG by RID (Quantitative) -Equine, Å†
10082	EQUINE IgM - QUANTITATIVE	IgM (Quantitative) by RID-Equine, Å†
1009	VON WILLEBRANDS	von Willebrand Factor*, Å†
1011	HEALTHCHEK W/ AMYLASE	HealthChek, Ñc with Amylase
10119999	HEALTHCHEK W/ AMYLASE	HealthChek, Ñc with Amylase-Standard CBC
1013	TOTAL HEALTH	Total Health, Ñc Profile

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

## To create DVMAX bill codes:

1. From the **Section** pull-down, choose **Inventory Management**
2. Search for **Bill Items**
3. Click **Add New**
4. Create a New Bill Item
  - a. Bill Code – In most DVMAX datafiles, the codes created follow a two or three letter category code, followed by 4 numbers. DVMAX does not create this code. Refer to existing codes to choose a unique code for each item.
  - b. Description – Enter the name of the lab test. (This will be the description that shows on the client’s invoice and in the patient history).
  - c. Category – A category must be entered – using the backspace or delete key followed by tab will bring up a list of all possible options
  - d. Bar Code or Requisition Code – this is left blank. Steps to link are below
  - e. Pricing Options
    - i. Enter a Service Price if the clinic is not charging based on a percent markup of their cost
    - ii. If the clinic would rather have DVMAX calculate the price to the owner based on a percent markup of their cost, the item must be linked to an inventory item
      1. Double-click in the Linked Inventory Item area
      2. Click Auto-link (this will create an inventory item with the same code and description as the bill item created)
      3. Purchase Unit and Disp Unit can be set to Test
      4. Last cost will be the cost to the clinic
      5. Qty on Hand, Reorder Min can be left blank. Rx Item and Taxable can be left unchecked. (Taxable is only checked here if the clinic pays tax on the lab test).
      6. Click OK to save
      7. Back on the Add linked inventory item window, click in the Markup field and enter the percent by which the clinic would like to markup the item.
      8. Click OK to save
      9. After saving, there should be an inventory price listed.
    - iii. Constraints/Attributes – these should be configured based on clinic preference or needs. (Do not check Lab Requisition here. Linking to requisition codes is done in the next step). See Appendix B for full details from the DVMAX Bill Items section of the manual.
5. Click **OK** to save

\*For additional information about DVMAX Bill Items, please refer to the Bill Items section of the DVMAX User Manual found here - [DVMAX Bill Items](#)



**To link DVMAX billing codes with IDEXX test codes:**

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

**Requisition Setup**

Provider: IDEXX

Setup Info | Requisition Codes | **Billing Codes** | Species Codes | Breed Codes | Panels

DVMAX Bill Code	DVMAX Bill Item Name	IDEXX Requisition Code
55-0516	Adult Annual (comp CBC) IDEXX	2215
55-0517	Adult Screen (comp CBC) w/ Spec cPL K9	2364
55-0518	Adult Annual S-CBC IDEXX	22159999
55-0519	Adult Screen S-CBC IDEXX	18509999
55-0780	Avian/Exotic CBC w/Plasma Protein IDEXX	137
55-1432	Canine Cardiac Profile/Cardiopet proBNP (S-CBC) IDEXX	27719999
55-1433	Senior Profile with Heartworm Standard CBC IDEXX	609999
55-1460	CBC, Standard IDEXX	375
55-1470	CBC Comprehensive IDEXX	300
55-1475	Comprehensive CBC w/Manual Platlet Count IDEXX	268
55-1480	CBC, No Diff IDEXX	332

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

Provider: IDEXX

Bill Code: 55-0517 Adult Screen (comp CBC) w/ Spec cPL K9

Linked Code:

Code	Name
1	HEALTHCHEK
1000	PHENOBARBITAL
10001	PHENOBARB, FOLLOW-UP
1001	DIGOXIN

4. Click **Select** to associate this test to the billing code in DVMAX. The line item now displays the associated IDEXX Requisition Code.

55-0517	Adult Screen (comp CBC) w/ Spec cPL K9	2364
---------	--	------

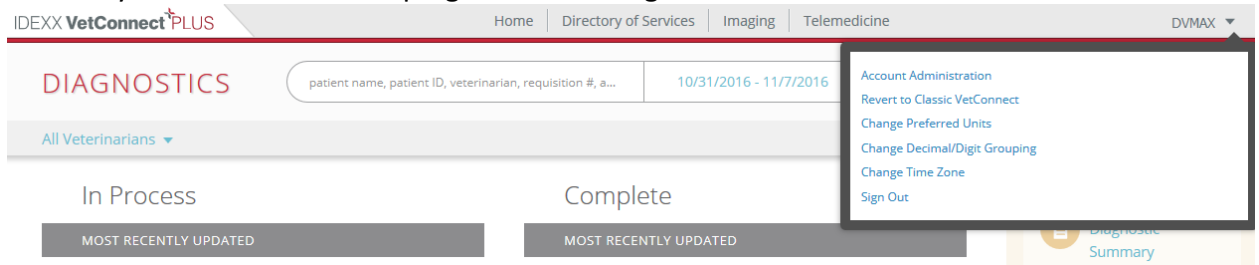
5. Review the **Species Codes** and **Breed Codes** tabs, and then link DVMAX codes to IDEXX codes as needed. **Note:** Not all species or breeds included in the DVMAX software will have testing available at IDEXX Reference Laboratories.

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

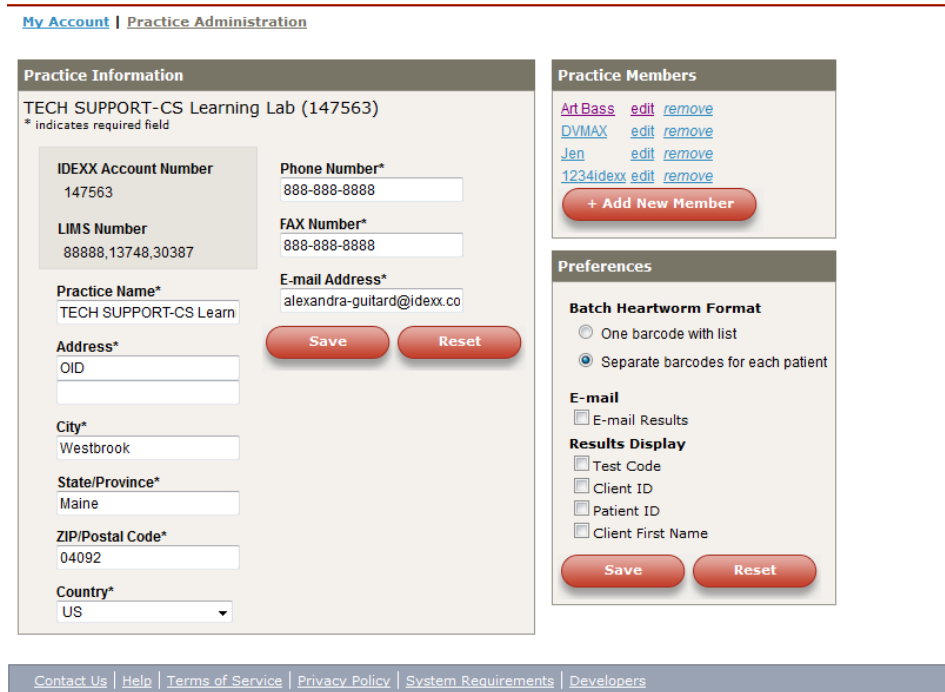
**To configure Requisition Staff:**

Note: This setup step is only necessary on versions up to DVMAX v8.5. Functionality has improved with DVMAX v8.6 and higher and these configuration steps are no longer necessary. If you are on v8.6 or higher, please skip to the next step. If you are interested in upgrading, the [Upgrade Process By Version](#) document on the DVMAX Knowledgebase will provide you with additional upgrade information.

1. Log into your VetConnect Plus account
2. Click on your account in the top right corner and go to Account Administration



3. Click on Practice Administration



4. Under Practice members select the doctor you wish to add to the list of staff to submit requisitions under.

- Next to the doctor's name is their vetconnect user name displayed in (...). In the example below abassdvmax is the user name.

[My Account](#) | [Practice Administration](#)

### Account Information

Art Bass (abassdvmax)  
\* indicates required field

<b>Display Name*</b> Art Bass	<b>Address*</b> OID
<b>Salutation</b> 	<b>City*</b> Westbrook
<b>First Name*</b> Art	<b>State/Province*</b> Maine
<b>Last Name*</b> Bass	<b>ZIP/Postal Code*</b> 04092
<b>Titles - Degrees</b> 	<b>Country*</b> US
<b>Password*</b> .....	<b>Phone Number*</b> 888-888-8888
<b>Password (confirm)*</b> .....	<b>FAX Number</b> 888-888-8888
	<b>E-mail Address*</b> none@none.com

### Permissions

- View Lab Reports
- Order Tests/Consult
- Administer Practice

### Preferences

#### Online Results

- Display Lab Result Comments

- Close out of the website when you have completed all VetConnect Plus configuration steps
- In DVMAX go to Section, Patient Codes, and staff.
- Locate the doctor you wish to add to your list for requisition submission.
- Check the box: Use Staff IDEXX Account and enter the VetConnect user name in the box below.
- Click OK to finish.

**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.

**IDEXX Configuration:**

Use VC Agent Lab Services     Use VC4 Lab Services

Check For Results    Check Every:  Hours

VC Agent User ID:     VC Agent Password:

VetConnect User ID:     VetConnect Password:

4. Choose Use **VC4 Lab Services** radio button
5. Enter your VCAgent and VetConnect **credentials**
6. Click **OK**
7. **Restart** the DVMAX Client application to implement the settings.

DVMAX software is now integrated with IDEXX Reference Laboratories

## Setting up Integration with IDEXX VetLab Station

Integration requires four steps:

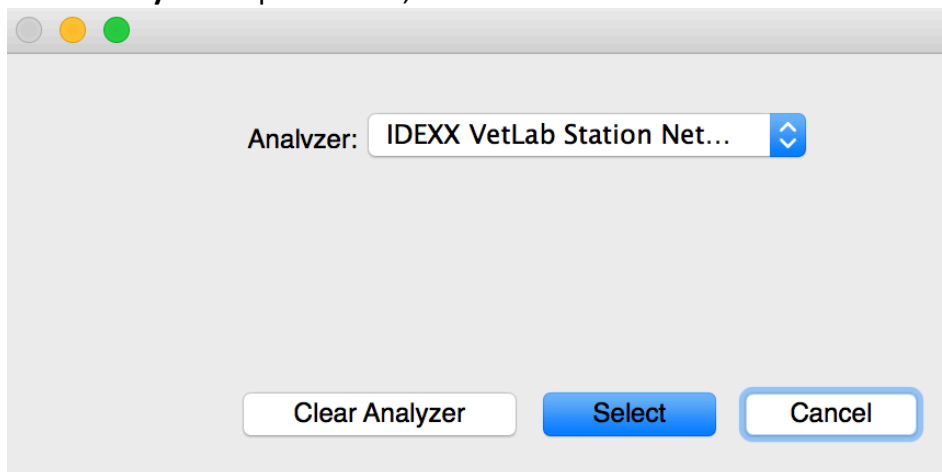
1. Configure analyzer settings
2. Configure the IDEXX VetLab Station
3. Download IDEXX test codes
4. Link IDEXX test codes to DVMAX billing codes

NOTE: If you are configuring a new VetLab Station on a workstation that previously had a different VetLab Station connect, you will need to follow these steps first:

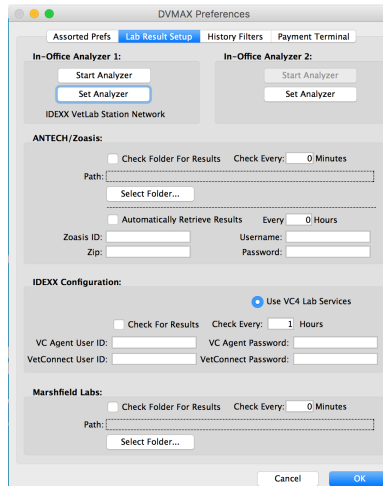
- Log in to DVMAX as the Administrator user
- While holding down the shift key, choose System Constants from the Section pull-down menu
- Click I Understand to open the Advanced Settings
- In the filter, search for internal.bldanal\_IVLS\_clientID
- Highlight this line and click the minus button

### 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.



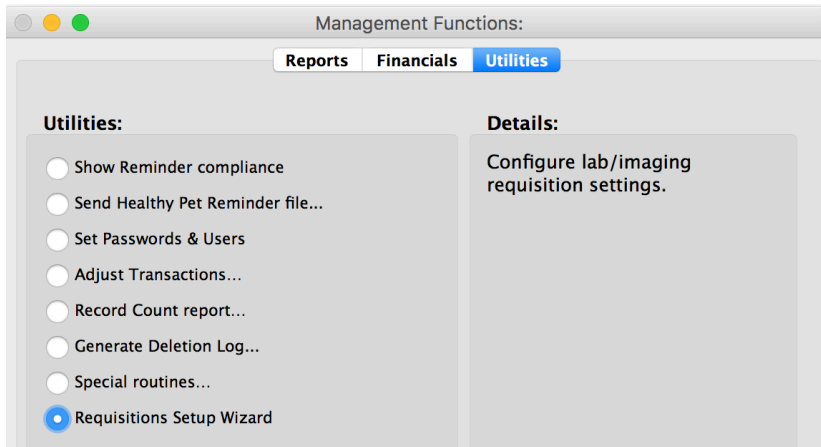
6. Keep the **DVMAX Preferences** window open on the workstation, and continue with the next procedure

### 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 the DVMAX workstation to which the IVLS is connected. (Do not enter the IP address for the server). (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:

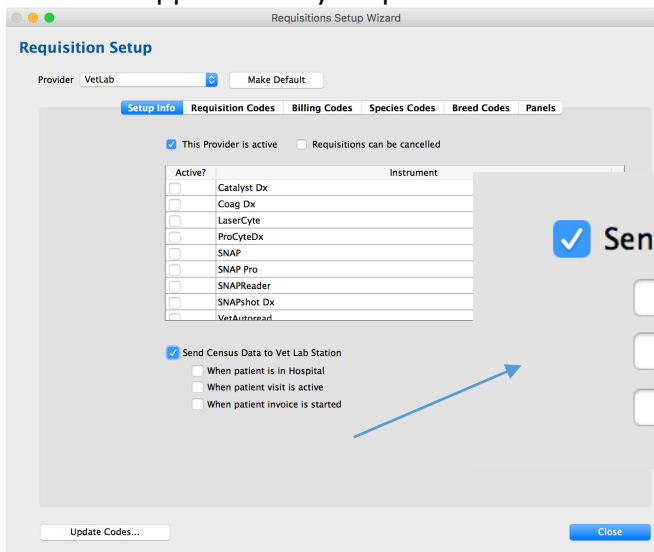
1. Within DVMAX, go to **Section>General Management**
2. Select the **Utilities** tab
3. Choose **Requisitions Setup Wizard** and click **OK**



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
  - a. IDEXX test codes, breeds, and species are imported into DVMAX software
  - b. This process may take a few minutes. 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



- Send Census Data to Vet Lab Station**
- When patient is in Hospital**
- When patient visit is active**
- When patient invoice is started**

10. Select the **Panels** tab

Requisitions Setup Wizard

### Requisition Setup

Provider:

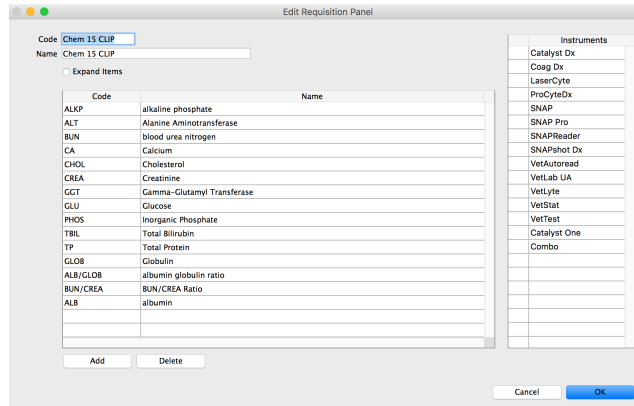
Code	Name
4DX Snap	4DX Snap
ACTH Sti...Addisons	ACTH Stimulation Addisons
ACTH Sti...Cushings	ACTH Stimulation Cushings
ALB	ALB
ALKP	ALKP
ALT	ALT
AMYL	AMYL
AST	AST
Avian Health Panel	Avian Health Panel
Bile Acids	Bile Acids
BUN	BUN
CA	CA
CBC	CBC
CBC/Chem	CBC/Chem
CBC/Chem10/Lytes	CBC/Chem10/Lytes
CBC/Chem15/Lytes	CBC/Chem15/Lytes
CBC/Chem17/Lytes	CBC/Chem17/Lytes
Chem 10	Chem 10
Chem 15 CLIP	Chem 15 CLIP

Filter: 
 Only include panels that are assigned to instruments

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



- 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, please contact DVMAX technical support.

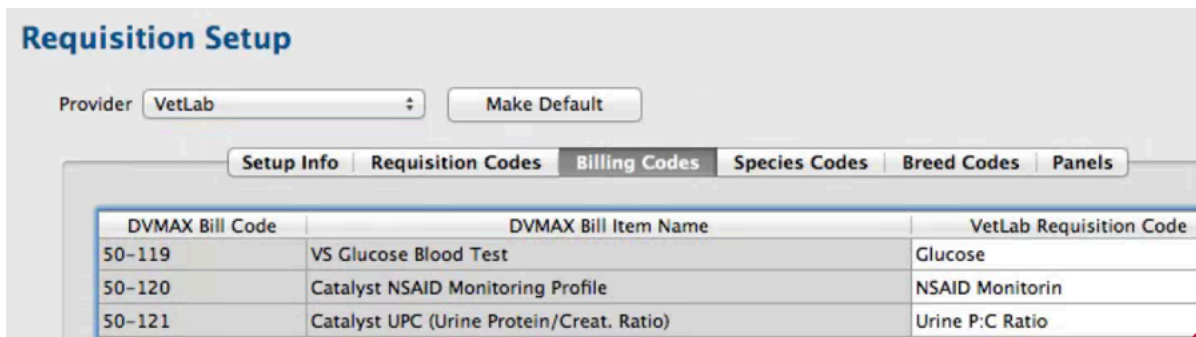
- Continue with the following procedure to link the codes.

**To link billing codes:**

- Select the **Billing Codes** tab

**Note:** Billing codes are created by your practice. If the billing code tab is empty, your practice must create the codes. (See To Create DVMAX Bill Items in the Setting Up Integration with IDEXX Reference Laboratories section above)

- Double-click the desired DVMAX Billing Code



- Use one of these methods to locate the VetLab Requisition Code that matches the billing code:
  - Type the IDEXX code in the Linked Code field

- b. Scroll through the IDEXX test names and click the test name to highlight it

Provider:

Bill Code:  VS Glucose Blood Test

Linked Code:

Code	Name
Glucose	Glucose

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.

DVMAX Bill Code	DVMAX Bill Item Name	VetLab Requisition Code
50-119	VS Glucose Blood Test	Glucose

5. Review the **Species Code** and **Breed Code** 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 the IDEXX VetLab Station instruments.

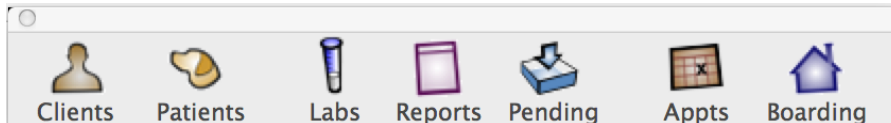
6. When done, Click **Close**

## Setting Up Integration with VetConnect® PLUS

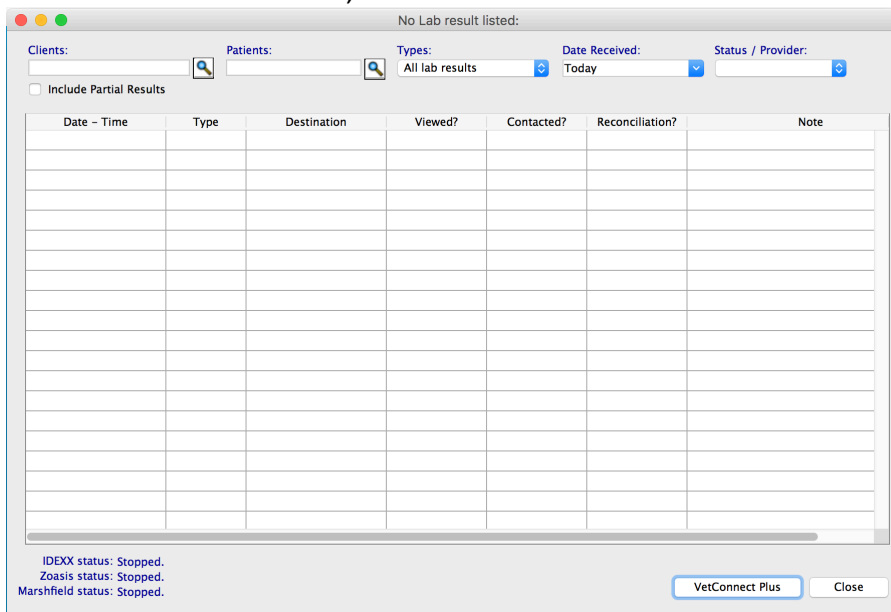
IDEXX VetConnect PLUS is a web-based solution for retrieving and viewing test results in real-time from IDEXX Reference Laboratories and IDEXX VetLab Station.

### To activate your VetConnect PLUS account:

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



2. In the Lab Results window, click VetConnect PLUS



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.

## DIAGNOSTICS

patient name, patient ID, veterinarian, requisition #, and/or accession # 11/29/2016 - 12/6/2016 📅 🔍

[Order Diagnostics](#) ▾

All Veterinarians ▾

### In Process

MOST RECENTLY UPDATED

No recent diagnostics

### Complete

MOST RECENTLY UPDATED

- ZOEY 42460 NOVICK  
**910 Urinalysis**  
**943 Urine Culture If Indicated and MIC Susceptibility, Low Colony C...**  
Nov 11, 2016
- GENO ANDERSON  
**300 CBC, Comprehensive**  
**999999 SEND TO/FAX TO REQUEST**  
Nov 10, 2016
- BREWSTER MARTIN  
**300 CBC, Comprehensive**  
**999999 SEND TO/FAX TO REQUEST**  
Nov 4, 2016
- SAMMY TERRAZOS  
**2666 Cardiopet® proBNP-Feline\***  
**9999 SAMPLE/TEST INFO NEEDED**  
Oct 14, 2016
- MEGAN CHARMA

[Generate Diagnostic Summary](#)

[IDEXX Reference Laboratory Operational Alerts](#)

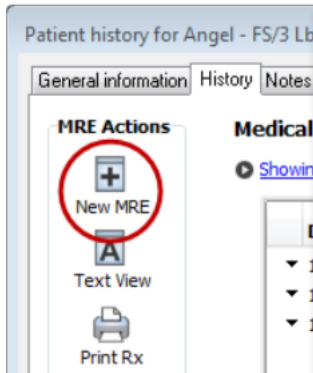
See what's new on VetConnect PLUS



## Ordering IDEXX tests within DVMAX Software

### To order a test via Patient History:

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



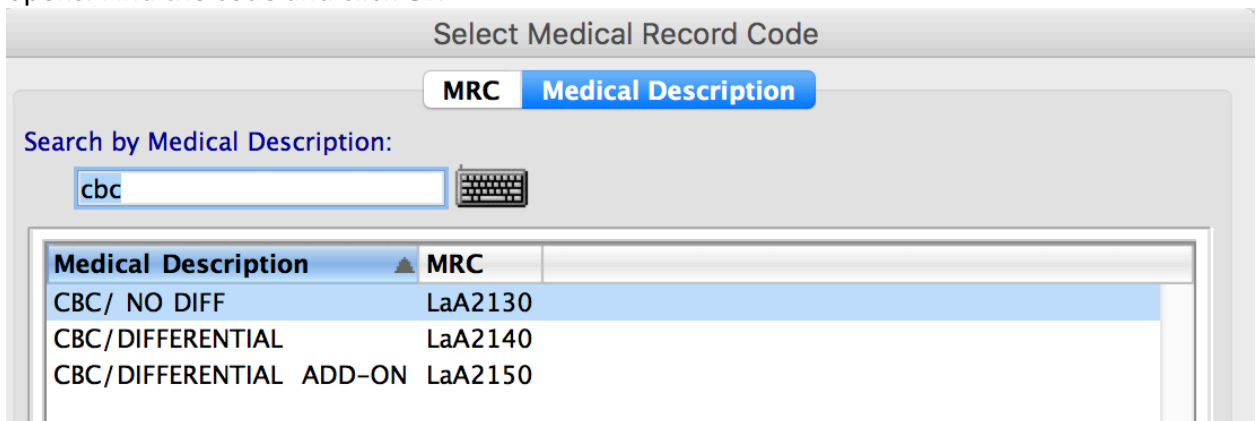
3. In the **Code** box, enter either the DVMAX billing code or the partial description and hit **Enter**

**Medical Record Entry Information:**

Code:  Qty:  Staff:

**Notes:**

**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.

6. To add another test to the same requisition, repeat **steps 2-5**
7. Click **Submit** in the Laboratory Requisitions window (See Navigating the Requisitions Window for additional information)

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

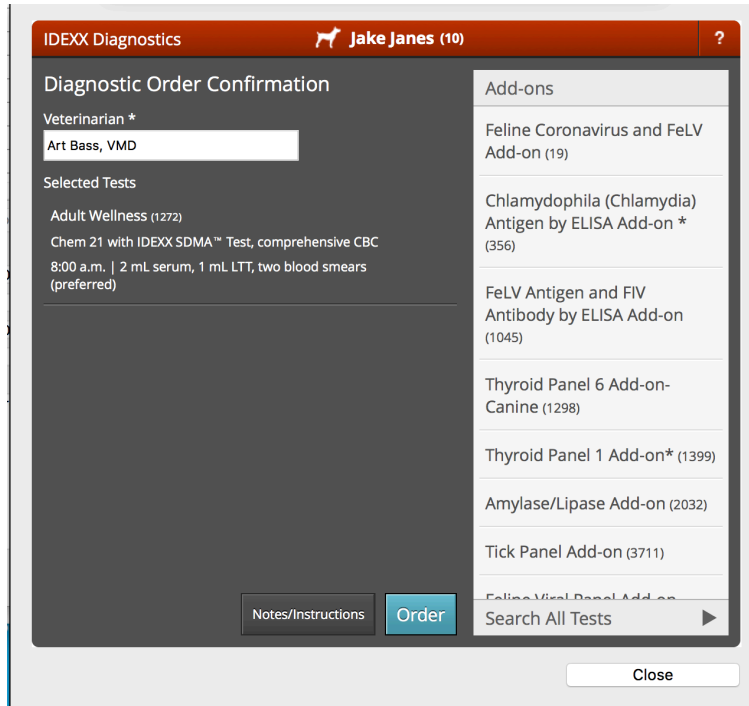
For reference laboratory tests, the VetConnect PLUS order window opens. Review Selected Tests, add notes or tests, if appropriate, and click Order to print the requisition form (See Navigating the VetConnect PLUS Order Window for more information on this window).

## Navigating the Requisitions Window

The screenshot shows a window titled "Requisitions" with the IDEXX logo. Inside, a dashed box contains the text "909999 - FELINE SENIOR PROFILE". Below this are fields for "Patient: # 1", "Staff:" (with a dropdown arrow), and "LIMS:" (with a dropdown arrow). At the bottom are "Submit" and "Edit" buttons. Red arrows point from external text to these elements:

- An arrow points from "Test to be ordered" to the dashed box.
- An arrow points from "Patient" to the "Patient: # 1" field.
- An arrow points from "Doctor Assigned" to the "Staff:" dropdown.
- An arrow points from "LIMS Account (if multiple accounts are configured for the practice)" to the "LIMS:" dropdown.
- An arrow points from "Clicking **Submit** will open VCPlus window." to the "Submit" button.
- An arrow points from "Clicking **Edit** will allow users to Add Notes or Delete Tests" to the "Edit" button.

## Navigating the VetConnect PLUS Order Window




1. The '?' question mark in the top right hand corner will provide a help screen for VetConnect PLUS giving the user instructions on what they can do in each section of the window.
2. Species Icon denotes species listed in DVMAX for the animal
3. Patient Name, Client Last Name, and Patient ID are listed next to species icon
4. Veterinarian – This is the veterinarian listed as the **Primary Provider** on the invoice
5. Selected Tests – Tests the user has added to the medical history or invoice. The information listed below the test is turnaround time and necessary samples needed for submission.
  - i. User can remove items from their selected tests by a single click on the test name and then click the minus symbol that appears.  
**Note:** Removing items from the VetConnect PLUS ordering window does not remove them the patient history or the client's invoice.



Adult Wellness (1272)  
Chem 21 with IDEXX SDMA™ Test, comprehensive CBC  
8:00 a.m. | 2 mL serum, 1 mL LTT, two blood smears (preferred)

- ii. User will be notified when additional specimen details are required for a specific test type.

Urinalysis Add-on (9101)  
 Specimen Details

- a. User will need to select the Specimen Details button to fulfill the required information so they can place the order.
- b. The specimen requirements screen will alter based upon the type of specimen details needed.

Collection Method \*  
Please select

Clinical Details 1500

Cancel Done

Site 1 of 2


Sample Tumor Character

Sample Type \*

Please select


Sample Location \*

Click the location



L R

Dorsal



R L

Ventral

Clinical Details 1500

Cancel Next Site

- iii. Once the user has what they want to order and have satisfied any additional informational needs they choose to enter additional notes or place the order.
6. Add-On Test available are listed on the right-hand side of the window
- i. If any add-on test chosen matches a bill item linked to an IDEXX lab code, the item will be added to the invoice.
- Note:** The invoice must be closed and then re-opened in order for the additional item(s) to appear on the invoice.

## 7. Search All Tests

The screenshot shows the IDEXX Diagnostics mobile application interface. At the top, the header reads "IDEXX Diagnostics" and "Molly Moser (2)". Below the header is a search bar with the placeholder text "Search by test name, code, or components". A navigation bar contains five icons: Frequent, Featured, Diseases, Systems, and Categories. The main content area displays a list of test results:

- Adult Wellness(1272)**  
Chem 21 with IDEXX SDMA™ Test, comprehensive ...  
8:00 a.m. | 2 mL serum, 1 mL LTT, two blood smea...
- Digoxin Add-on(10011)**  
1-3 working days | 1 mL serum (RTT only, no SST)
- Thyroid Panel 6 Add-on-Canine (1298)**  
Endogenous cTSH, free T4  
2-3 working days | 2 mL serum
- Thyroid Panel 1 (13)**  
Total T3, total T4

At the bottom of the list is a dropdown menu currently set to "Canine". To the right of the list is a "New Diagnostic Order" panel. It includes a "Veterinarian \*" field with "Art Bass, VMD" entered, a "Selected Tests" section showing "Adult Wellness (1272)" and "Chem 21 with IDEXX SDMA™ Tes...", an "Add-ons Available" button, and "Notes/Instructions" and "Order" buttons. A "Close" button is located at the bottom right of the entire interface.

### i. Search options for tests include

1. Frequent
2. Featured
3. Diseases
4. Systems
5. Categories

## 8. Notes/Instructions

The screenshot shows the "Notes/Instructions" form. It contains the following fields:

- Technician**: A text input field with the placeholder "Please enter".
- Collection Date**: A date input field with the value "09/27/2016".
- Previous Reference #**: A text input field with the placeholder "Please enter".
- Clinical Details**: A text area with the placeholder "Please describe" and a character count of "1000".

At the bottom of the form are "Cancel" and "Done" buttons.

- i. User can choose to enter in additional information related to the order. This information will appear on the printed requisition form.
  - 1. Technician creating the order can enter their name here. This is not required by DVMAX or VetConnect PLUS.
    - a. Once a name has been entered VetConnect PLUS remembers that name and will provide a list to select from going forward
  - 2. Collection Date is automatically defined by the date the order is being created but user can alter if different
  - 3. Previous Reference # allows the user to reference a different order they placed with IDEXX. (Used primarily in Europe)
  - 4. Clinical Details allows the user to enter any additional notes they want the labs to have related to this orders details.
- 9. Order – After information in the VetConnect PLUS box has been confirmed, and all Add-On tests chosen, click Order. Users will be brought to a print dialog box to print the requisition form.

**To view completed or pending requisitions:**

1. Open the patient record, and 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 or IDEXX Reference Lab.  
**Completed:** Either the reference laboratory form has been finalized, or results have been returned from the IDEXX VetLab Station.

Date Created	Requisition #	Status	Modality
10/19/16	224	Open	IDEXX
10/18/16	214	SUBMITTED	IDEXX
10/18/16	213	SUBMITTED	IDEXX
10/18/16	212	SUBMITTED	IDEXX

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

Edit Requisition

Requisition Info

Status:     Lab Provider:     Have results been received?

Staff:

Notes:

Date Created	Time Created	Bill Code	Req. Code	Name
10/13/16	4:16 PM	LaA1040	1272	ADULT WELLNESS

- To view or reprint an IDEXX Reference Laboratories requisition, click View Requisition Form. The form opens as a PDF file. (See Appendix A for details regarding the IDEXX Requisition Form)

IDEXX

Requisition #102284219

Bailey Cosenza

---

Accession Sticker 1 of 1

888881, 102284219, 1272, 8870, COSENZA, BAILEY, M, CANINE, 07/30/2005, PUG, ROBERT SMITH, DVM, 10/14/2016, MN CANINE, C/STA

**Bailey Cosenza (11)**

Species: Canine  
Breed: Pug  
Gender: Male Neutered  
Age: 11 y (07/30/2005)

Practice Affiliation: Staff Member

**TECH SUPPORT-CS Learning Lab (888 88)**

OID  
Westbrook, Maine 04092

Phone: 888-888-8888  
Fax: 888-888-8888  
Veterinarian: Robert Smith, DVM

**Details**

Collection Date: 10/13/2016  
Previous Reference #:  
Clinical Details

**Tests**

**ADULT WELLNESS (1272)**  
2 mL serum, 1 mL LTT, two blood smears (preferred)

## To edit requisitions:


When working with IDEXX Reference Lab requisitions, the requisition form is editable for 30 days

### Delete One or More Tests from a Requisition

If the requisition is open (not yet submitted), you can always delete an item from the requisition. **NOTE:** Best practice is to delete from the VetConnect PLUS order window.

To delete an item from a requisition:

1. From the Requisition window, click **Edit**.
2. From the Edit Requisition dialog, select the item you want to delete.
3. Click **Delete**.
4. Click **OK** from the Confirm dialog to delete the requisition item.


 In cases where deleting an item from an unsubmitted (open) requisition leaves the requisition blank, it is recommended that you delete the full requisition. Leaving blank, open requisitions in DVMAX may affect the display of the Requisitions window.

### Update Test

This button is not available when working with IDEXX Reference Lab requisitions.

### Cancel a Submitted Requisition

This button is enabled only for IDEXX Reference Lab requisitions where the status is **Submitted** or **Draft**. Requisitions with a status of **Accessioned** or **Completed** cannot be canceled. Clicking **Cancel Requisition** from the Edit Requisition dialog will change the status of the requisition to **Cancelled**.

 It is very important to recognize that cancelling a requisition does not remove the associated bill item from an invoice, nor does it remove the requisition record from patient History. Please check your records and manually remove an item from the invoice if the client is not to be billed for the canceled requisition.

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

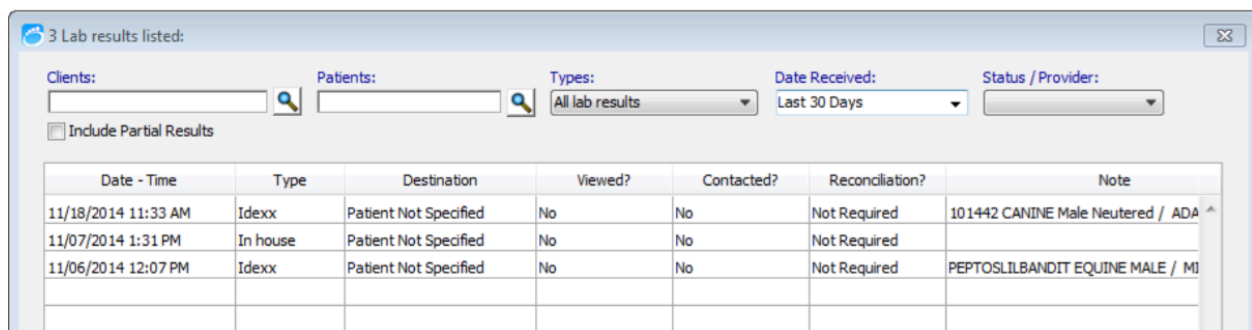
**Note:** This does not affect billing or the patient history. Adjust the invoice or history accordingly.

## 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 results to a patient record. See the next section.

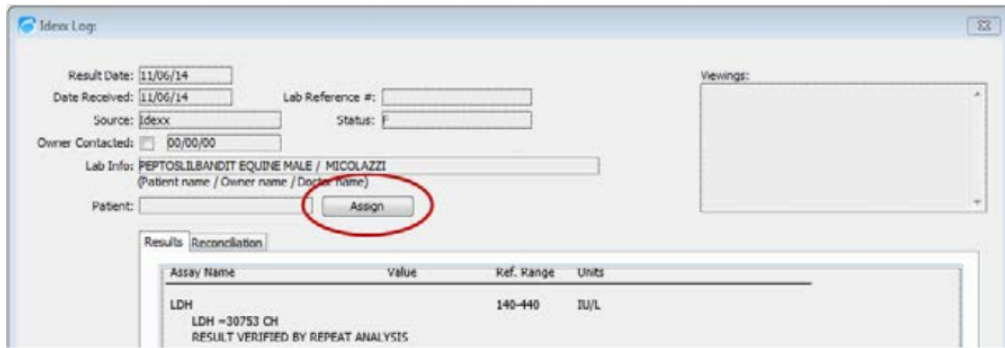


Date - Time	Type	Destination	Viewed?	Contacted?	Reconciliation?	Note
11/18/2014 11:33 AM	Idexx	Patient Not Specified	No	No	Not Required	101442 CANINE Male Neutered / ADA
11/07/2014 1:31 PM	In house	Patient Not Specified	No	No	Not Required	
11/06/2014 12:07 PM	Idexx	Patient Not Specified	No	No	Not Required	PEPTOSILBANDIT EQUINE MALE / MI

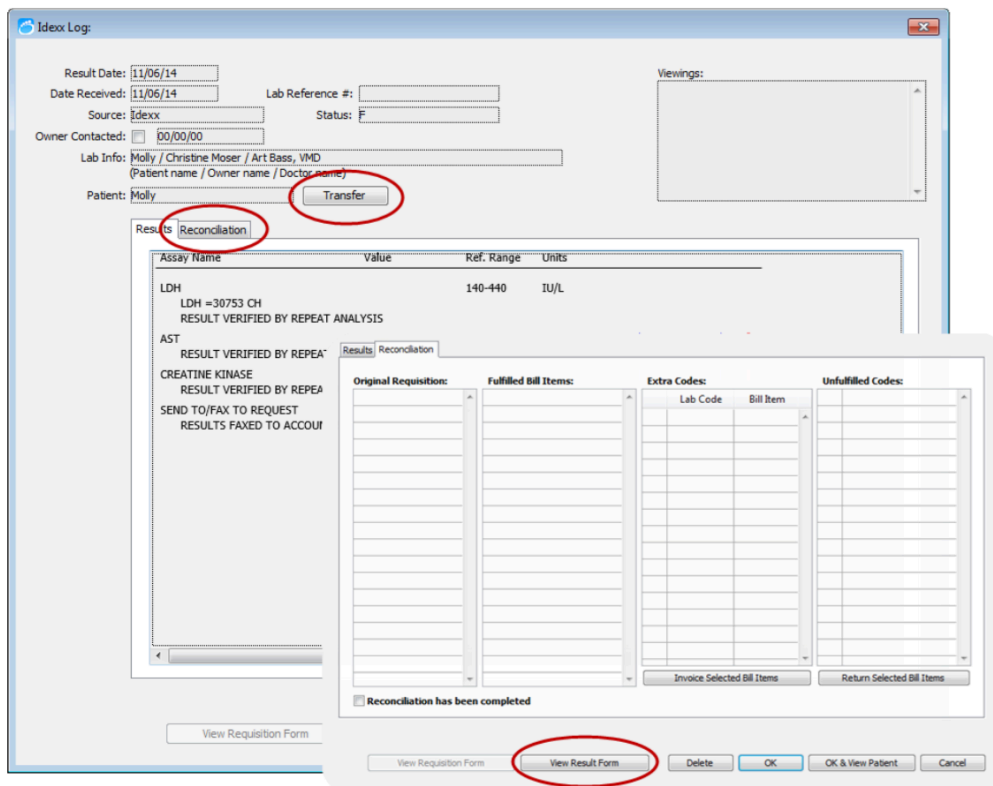
3. Click **Close**

### 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 select patient. The log window is updated with the new patient information.
5. Select the **Reconciliation** tab to reconcile charges for tests not requested.



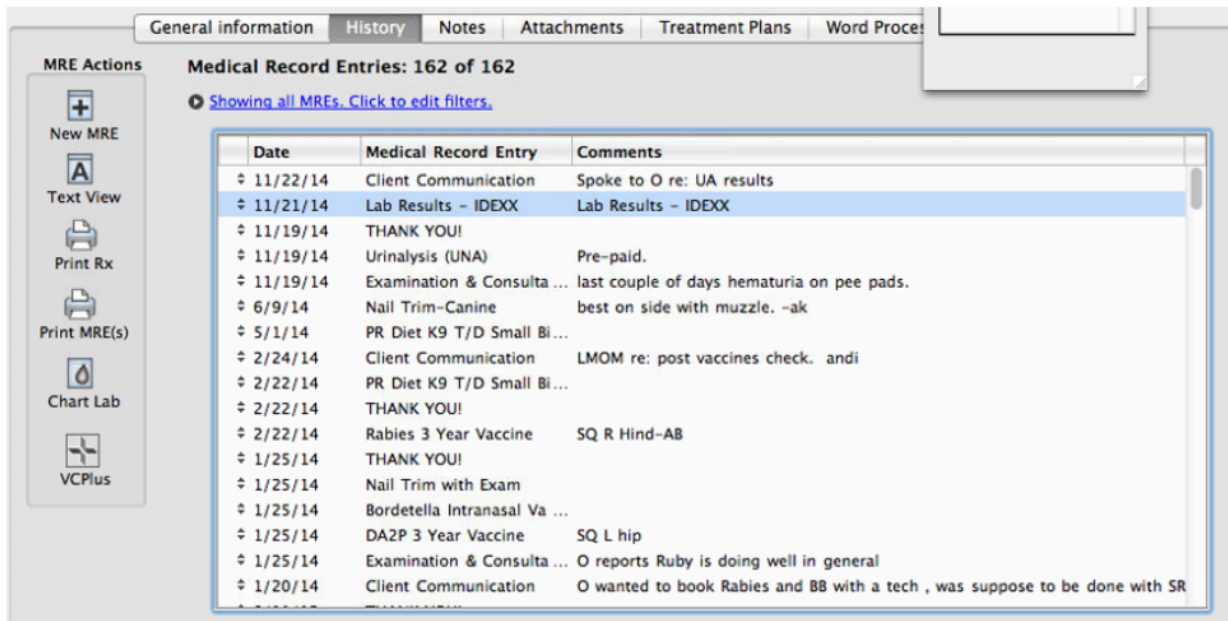
6. Select **View Result Form** to view the PDF report from IDEXX.
7. Select **Transfer** to move the results into the patient's medical record.



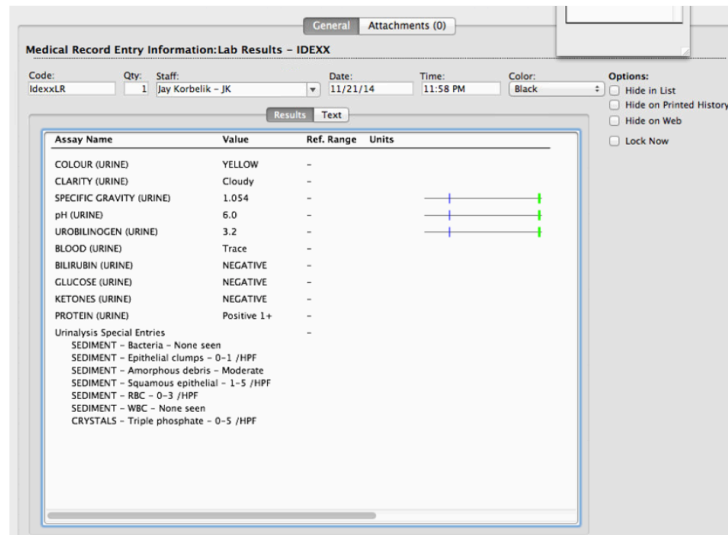
8. To view results within the patient record, click **OK & View Patient**

**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.



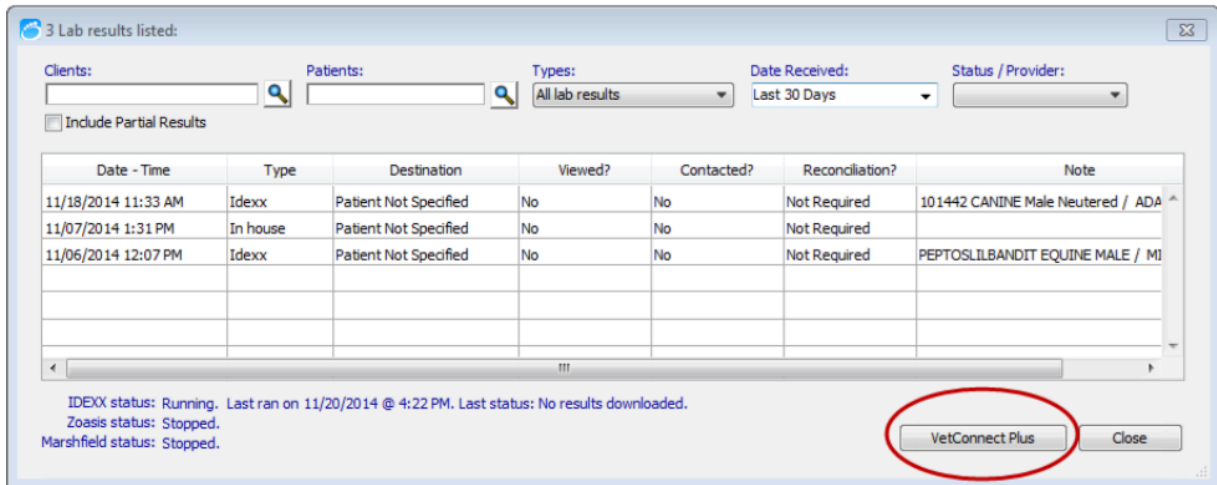
2. Double-click the history entry to see the results



## Viewing IDEXX Results in VetConnect PLUS

### To open VetConnect PLUS from the Lab Results window:

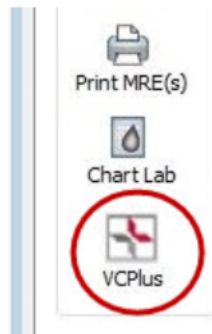
1. In the Command Palette, select **Labs**
2. In the Lab Results window, click **VetConnect PLUS** in the lower right corner of the window



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.

**Note:** When configuring results to download (page 9) the setting must be set as Use VC4 Lab Services in order for the link between the patient record and VetConnect PLUS to be established.

**To learn more about VetConnect PLUS:**

Visit [vetconnectplus.com](http://vetconnectplus.com) or [idexxlearningcenter.com](http://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](http://vetconnect.com) and click **Subscribe now**, or email [vccontactus@idexx.com](mailto:vccontactus@idexx.com).
- In Canada, call 1-800-667-3411, or email [vccanada@idexx.com](mailto: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 a 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.

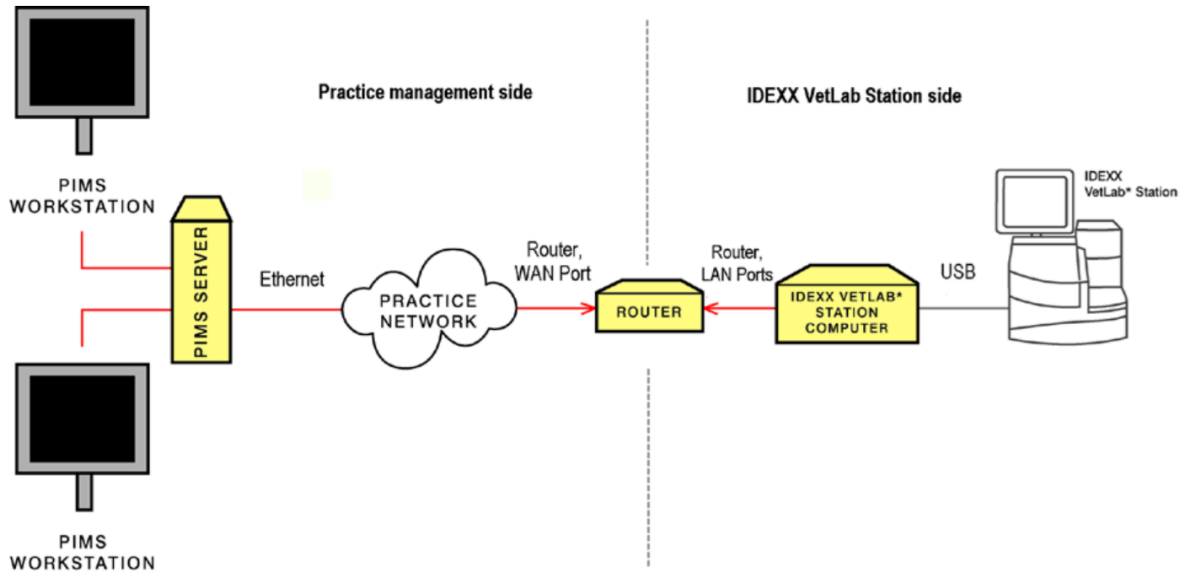
### Setting a DVMAX Workstation to a Static Network IP Address

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.

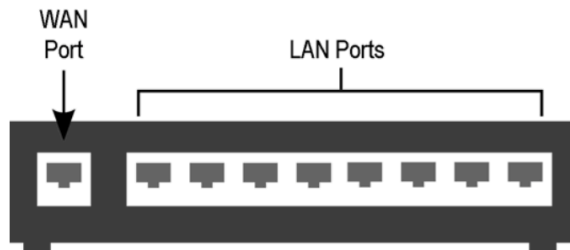
Please consult with your practice IT or computer professional to identify the best resolution for your practice.

## 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.

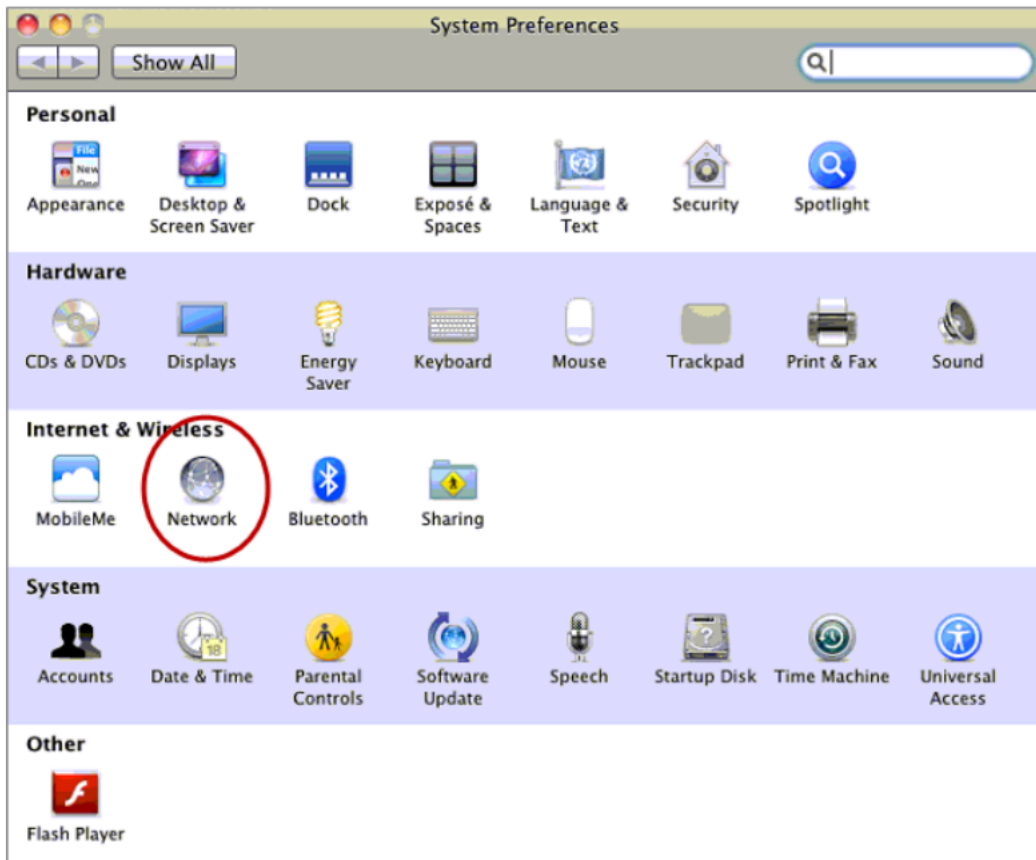
The IDEXX VetLab Station and analyzers must connect to the **LAN ports** of the IDEXX router. (The individual analyzers can also be connected directly to the IDEXX VetLab Station computer).

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.

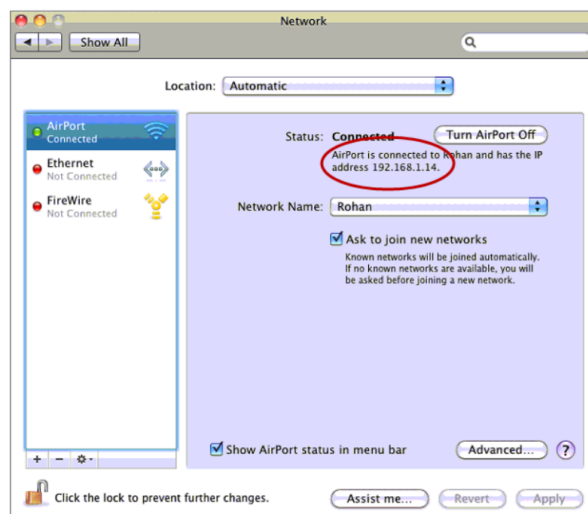
**To find the DVMAX Client IP address:**

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.



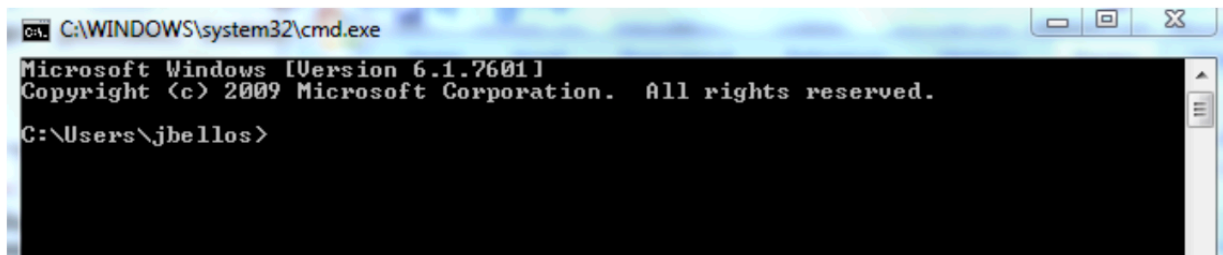
4. On the right, note the IP address for this computer.

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

Windows® operating system:

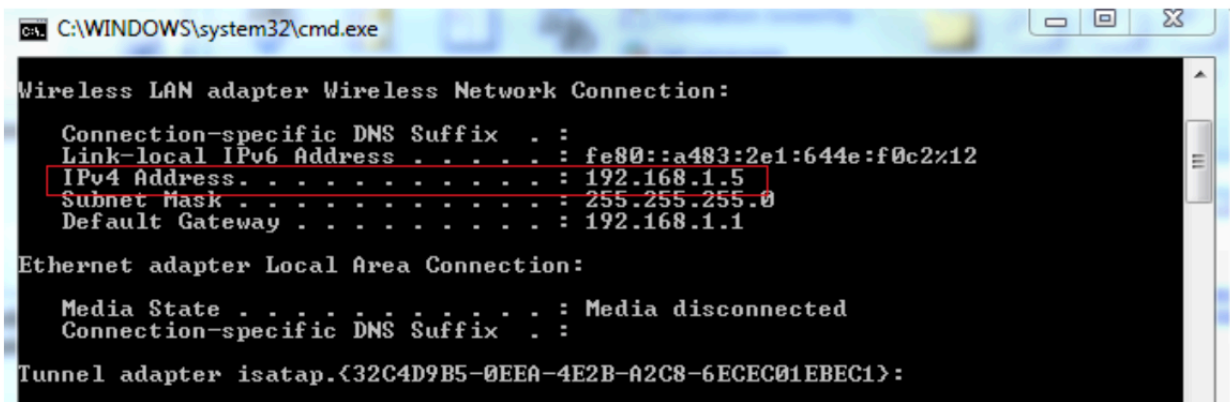
1. Go to Start menu at the lower left corner of the desktop, type **CMD**, and then press **Enter**.

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



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.
C:\Users\jbellos>
```

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



```
C:\WINDOWS\system32\cmd.exe
Wireless LAN adapter Wireless Network Connection:
Connection-specific DNS Suffix . . . :
Link-local IPv6 Address . . . . . : fe80::a483:2e1:644e:f0c2%12
IPv4 Address. . . . . : 192.168.1.5
Subnet Mask . . . . . : 255.255.255.0
Default Gateway . . . . . : 192.168.1.1

Ethernet adapter Local Area Connection:
Media State . . . . . : Media disconnected
Connection-specific DNS Suffix . . . :

Tunnel adapter isatap.{32C4D9B5-0EEA-4E2B-A2C8-6ECEC01EBEC1}:
```

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.



# IDEXX Requisition Form



Requisition #102075238  
Prince Janes

Accession Sticker 1 of 1



888881, 102075238, 1272, 8870, JANES, PRINCE, M, CANINE, 01/29/2012,  
DACHSHUND, ART BASS, VMD, 09/22/2016, MI CANINE, C

## Details

Collection Date: 09/22/2016

Previous Reference #:

Clinical Details

## Tests

ADULT WELLNESS (1272)

2 mL serum, 1 mL LTT, two blood smears (preferred)

## Prince Janes (9)

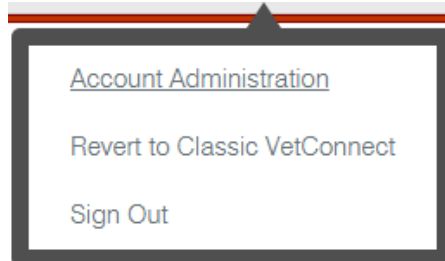
Species:	Canine
Breed:	Dachshund
Gender:	Male
Age:	4 y (01/29/2012)

## TECH SUPPORT-CS Learning Lab (888 88)

OID	
Westbrook, Maine 04092	
Phone:	888-888-8888
Fax:	888-888-8888
Veterinarian:	Art Bass, VMD

## Lab Use Only

- Requisition #: Globally unique and generated by VetConnect PLUS
- Practice Information printed on the form is the information entered on VetConnect PLUS not in DVMAX.
  - User will need to update their practice information on VetConnect PLUS from the Account Administration section on VetConnect.



**Practice Information**

IDEXX Integrated Practice Marketing/Development (153019)  
\* indicates required field

**IDEXX Account Number**  
153019

**Phone Number\***  
207-556-0300

**LIMS Number\***  
30387

**FAX Number\***  
207-556-0300

**Service Region\***  
US

**E-mail Address\***  
tim-gardner@idexx.com

**LIMS\***  
Antrim

**Save** **Reset**

**Language\***  
en\_US

**Practice Name\***  
IDEXX Integrated Practice M

**Address\***  
1 IDEXX Drive

**City\***  
Westbrook

**State/Province\***  
Maine

**ZIP/Postal Code\***  
04092

**Country\***  
US

\*updated 5/11/17 to include steps for bill item creation