Zoetis Reference Labs

version 24.11.0 and higher

AVIMARK®

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Overview

Zoetis Reference Laboratories provides full-service diagnostics for clinical and anatomic pathology testing covering most species. This guide will aid in the setup and use to take full advantage of this integration with Avimark.

Requirements and Supported Versions

Your practice must provide the following:

1. Internet access on all computers that will be used to create test requisitions.
2. A Zoetis account with username and password.
3. Avimark version 24.11.0 or higher.
4. Actively enrolled in Avimark Technical Support plan (required if a software update or setup assistance is needed).

Setup

There are different areas of Avimark that need to be setup for the Zoetis Reference Labs integration to work.

Advanced Options

To setup Zoetis Reference Labs, go into **Work with > Hospital Setup > Advanced** tab > **Advanced Options**. Search for Zoetis and configure the following settings:

Active — Switches the integration on and off.

API Password — This field should contain the Zoetis-assigned account password.

**API Username** — This field should contain the Zoetis-assigned account username.

Auto import and attach Zoetis Lab PDF — Setting this value to True automatically downloads and attaches the Lab Result PDF to the Zoetis entry in Medical History as a File Attachment.

Auto import Zoetis Results on Load — Setting this value to True automatically imports results to the Test window to the Zoetis line entry in Medical History after downloading results through the Requisition Management window.

Clinic ID — This field should contain the Zoetis-assigned unique ID.

Overwrite Existing Zoetis Test Results on Import — Setting this value to True automatically overwrites partial test results with the final test results once they are downloaded.
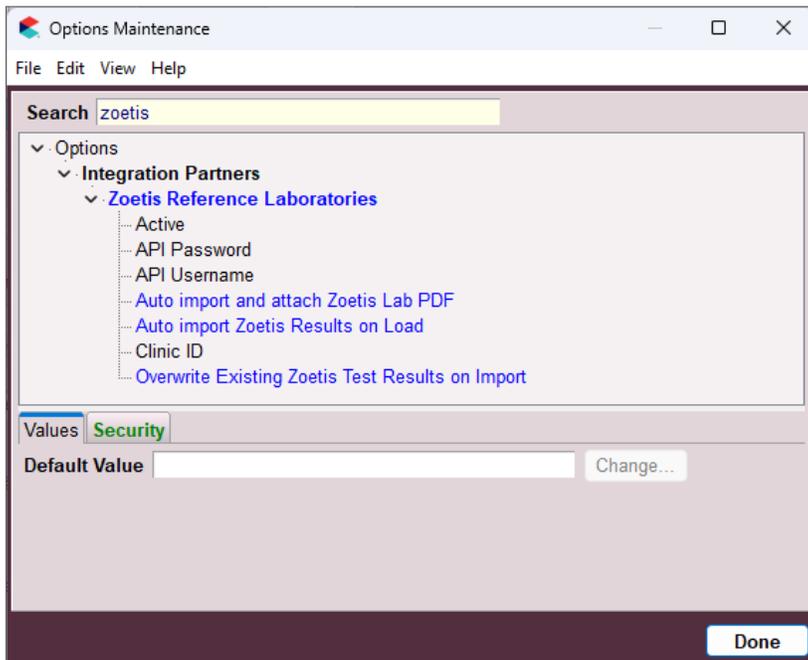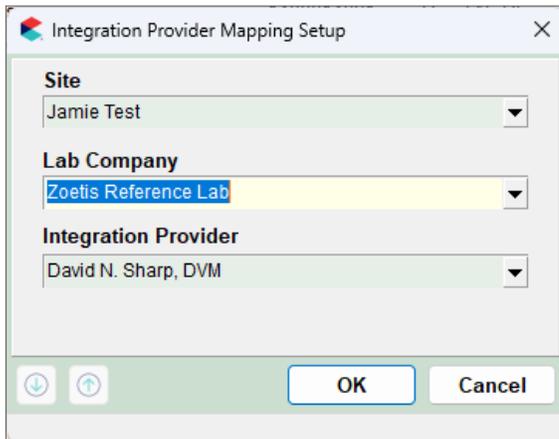

Users and Security

For ordering labs through Zoetis, it is required to send up a clinician ID. For that reason, Avimark downloads and stores the list of Zoetis clinicians and allows the practice to associate the clinician to an Avimark employee. As a result, commonly utilized employees tied to the Zoetis order will automatically send up their associated Zoetis clinician ID.

To associate a Zoetis clinician to an Avimark employee:

1. From the CID, click on **Work with > Users & Security**.

2. Locate the employee(s) who will be submitting Zoetis orders.

3. On the selected employee, **right-click > Change**.

4. Click on the **Integrations** tab.

5. Click the **New** button ( ).

6. In the **Integration Provider Mapping Setup**, select **Zoetis** as the **Lab Company**.

7. Select the **Integration Provider** from the drop-down list.

Integration Provider Mapping Setup ✕

Site
Jamie Test ▼

Lab Company
Zoetis Reference Lab ▼

Integration Provider
David N. Sharp, DVM ▼

⊘ ⊕   OK   Cancel

8. Click **OK** to save changes.

System Tables

There is a new addition in the Species Table to accommodate Avimark to Zoetis species mapping. If the patient does not have a species assigned, the user will be prompted to make the association "on the fly" when trying to create a requisition.

The Zoetis species can be assigned manually following the steps below. However, if a species has already been mapped to Zoetis, do not change it.

1. From the CID, click on **Work with > System Tables**.
2. From the **Species** table, select a species such as Canine.
3. On a species to map to Zoetis, **right-click > Change**.
4. Click on the **Mapping** tab.
5. Locate Zoetis Reference Lab.
6. Double-click on the **Code** field for Zoetis.
7. Select the species from the drop-down list.
8. Click **OK** to save changes.
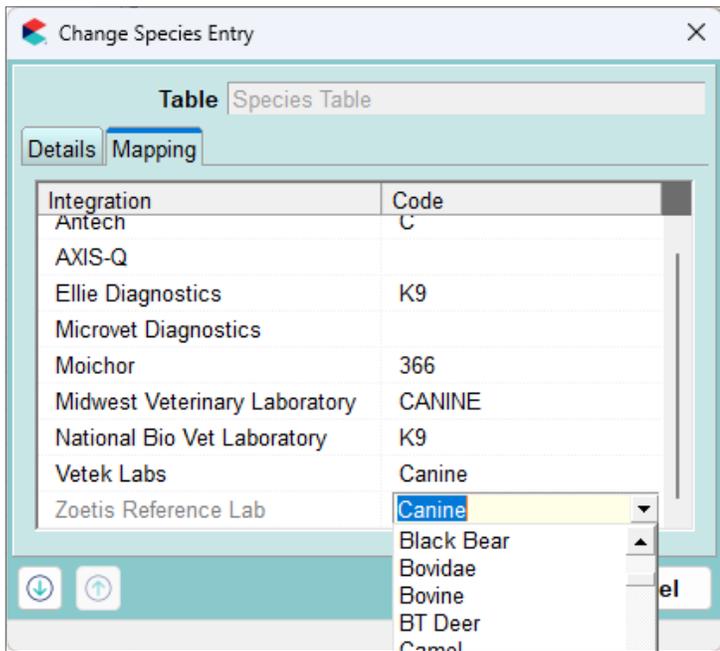
9. Click **OK** to save the species entry.

10. Click **Done** to close System Tables.

> If the patient does not have a breed, Avimark will prompt the user to enter the breed for the patient before the requisition will be created.
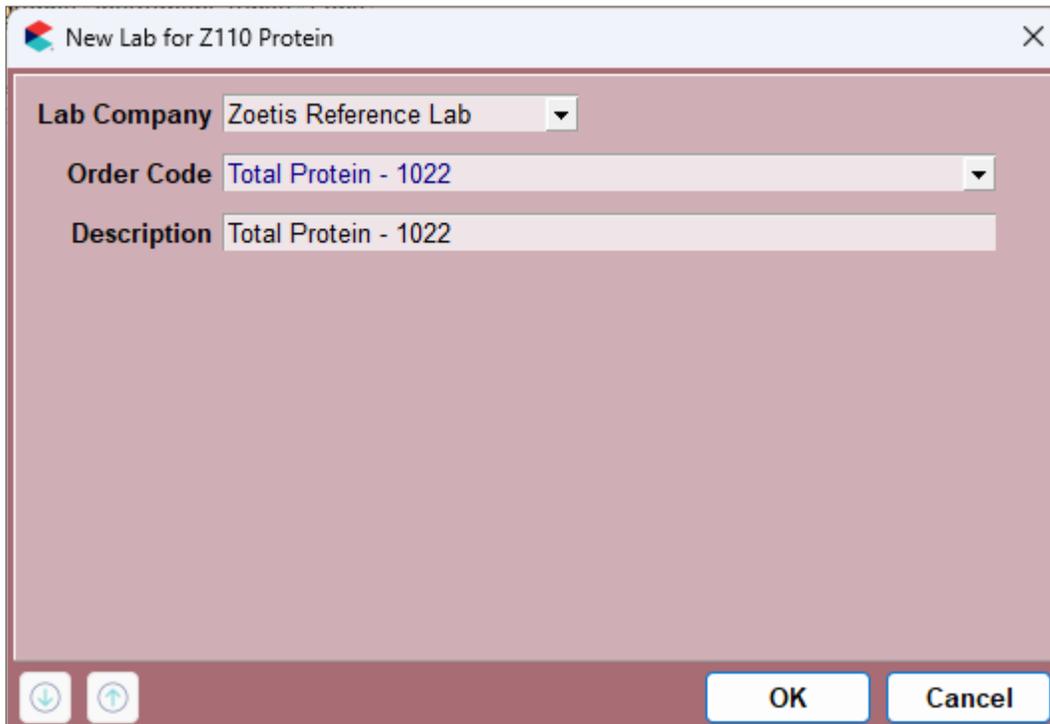
Link a Zoetis Test to a Treatment

From the Treatment List, associate a Zoetis code to a treatment.

1. From the CID menu, click on **Work with > Treatment List**.

2. In the Treatment List, locate the treatment to associate with a Zoetis test.

3. On the treatment, **right-click > Change**.

4. In the **Change Treatment** dialog box, click on the **Laboratory** tab.

5. On the Laboratory tab, click on the **Labs** sub-tab.

6. Click on the **New** button (⊕).

7. From the **Lab Company** drop-down list, choose **Zoetis Reference Lab**.

8. From the **Order Code** drop-down list, select the Zoetis test for this treatment. Begin typing in the name of the test or code to quickly filter the list.

9. With the Zoetis test code selected, click **OK** to save.

10. If the cost of the treatment differs from the cost of the Zoetis test, a prompt will display with the cost difference. The user has the option to accept the update or not.
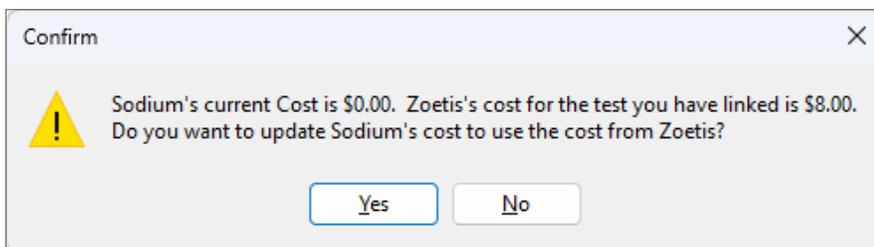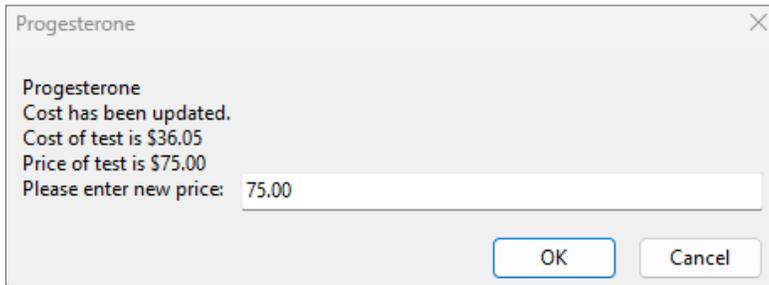

11. If the user clicks **Yes** to update the cost, the following screen will appear so they can accept the new price or enter the new price if it is different than the suggested price.

Progesterone

Progesterone
Cost has been updated.
Cost of test is $36.05
Price of test is $75.00
Please enter new price: 75.00

OK   Cancel

12. Click **OK** to save the new price.

Associating Treatments

Associating treatments displays the entire list of Avimark treatment codes and descriptions, as well as a column showing the Zoetis Reference Lab codes and descriptions. If an Avimark treatment currently has a Zoetis test code associated with it, the Zoetis test will be displayed in the **Reference Laboratories** column.

To associate a Zoetis lab with an Avimark treatment:

1. From the CID, click on **Work with > Treatment Lists**.
2. From the Treatment List menu bar, click on **Import Lab Treatments > Associate Services**.
3. In Associate Services, from the **Lab Company** drop-down list, select **Zoetis Reference Lab**.
4. Under the **Reference Laboratories** column:

   a. Click in the cell for an Avimark treatment.
   b. Click the down arrow to display the list of Zoetis reference labs.
   c. Scroll through the list or begin typing in the code or test name to filter the list.
   d. Select the Zoetis lab.

5. Click **Done** to save and close Associate Services.

6. Click **Done** to close the Treatment List.

Requisitions and Results

The Zoetis Reference Lab requisition order process provides the capability of, when completing an order, to display the primary window with the treatments selected.

1. In the patient area, **right-click > Create Requisition**. The options to create and view requisitions can be found on the right-click menu from Medical History.

2. In the Create Requisition window, from the **Lab Company** drop-down list, choose **Zoetis Reference Lab**.

3. **Right-click** on a test and choose **Select** to add the test. Users can add as many tests as needed in this window.

4. If you don't want to send the requisition just yet, clear the **Send Requsition** check box at the bottom. This will allow the user to add additional tests until ready to send the requisition.

◊ To add additional tests, on the requisition **right-click > Requisitions > Edit Requisitions**. Below is an image showing a requisition that has not been sent. It does not have a requisition number and won't get an ID until the requisition is sent.

5. When finished adding tests, verify the **Send Requisition** is **checked** then click **OK**. The Zoetis requisition order form will appear (*see the image below*).
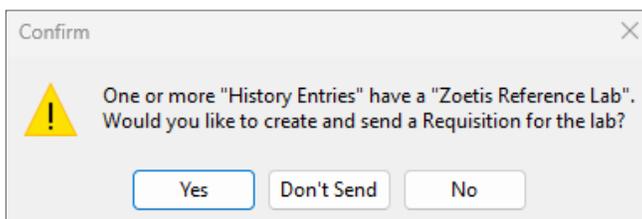

◊ From the Order screen, users can **print** (🖨) the order or click **download** (⬇) to save the requisition.

◊ In the patient's Medical History, **right-click > Requisitions > View Requisitions** on the Zoetis Requisition to view the requisition form.

Send Requisition through Medical History

If a treatment linked to Zoetis is added to a patient's Medical History, a prompt will display if a requisition should be created and sent.

1. On a patient's Medical History, **right-click > Choose > Treatments**.

2. Select a treatment linked to Zoetis.

3. The following prompt will appear:

Confirm ✕

⚠ One or more "History Entries" have a "Zoetis Reference Lab". Would you like to create and send a Requisition for the lab?

[Yes] [Don't Send] [No]

4. Choose one of the following:
   ◊ **Yes:** Sends the requisition and the requisition is assigned an ID.
   ◊ **Don't Send:** This will create the requisiiton but it will not be assigned an ID number until it is actually sent to Zoetis. Users will still be able edit the requisition to add more tests until ready to send.
   ◊ **No:** A requisition will not be created. The treatment will be added as an item in Medical History.

Add-ons

When a requisition has been sent, you can still add on additional tests to that sent requisition.

1. To add additional tests to the requisition, on the requisition **right-click > Requisitions > Edit Requisitions**.

2. In the Edit Zoetis Requisition window, **right-click > Select** to add additional tests. **Note**: *The previous tests on the sent requisition are grayed out and the new tests are in black.*

3. Click OK when finished adding tests.

4. The Requisition PDF with the additional tests added will display.

Notifications

When results are available for download, a notifcation will get sent to Avimark and is shown in the upper-right corner of the program window.
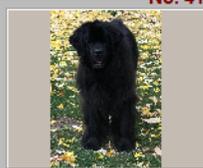
View Notifications

- Click on **Notifications** to view the messages.
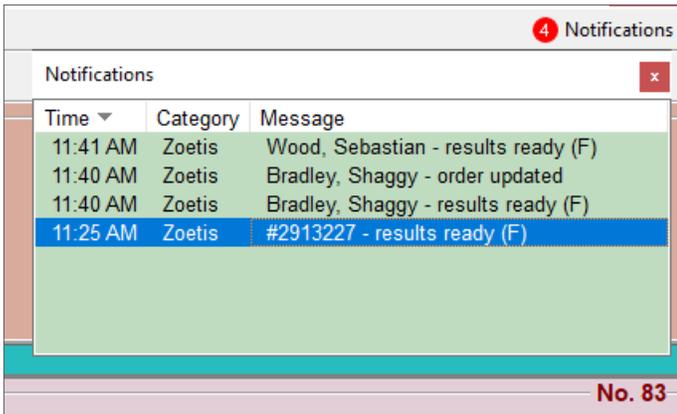
- If a notification shows "**order updated**", this means a test or tests were added to a requisition via the Zoetis portal. It is recommended that requisitions get updated, or edited, from within Avimark.

- **Right-click** on a requisition and choose the appropriate option:

  ◊ **Acknowledge**: Grays out the notification and will remove it from the list when the results are downloaded.

  ◊ **Requisition Management:** Opens Requisition Management.

  ◊ **Update Requisition:** This option will only appear on a requisition that shows "order updated". When selected, the user can choose to Import & Link to Treatment to capture the charge. However, if the test was previously added to the patient's medical history, the user does not have to check the option to Import & Link.
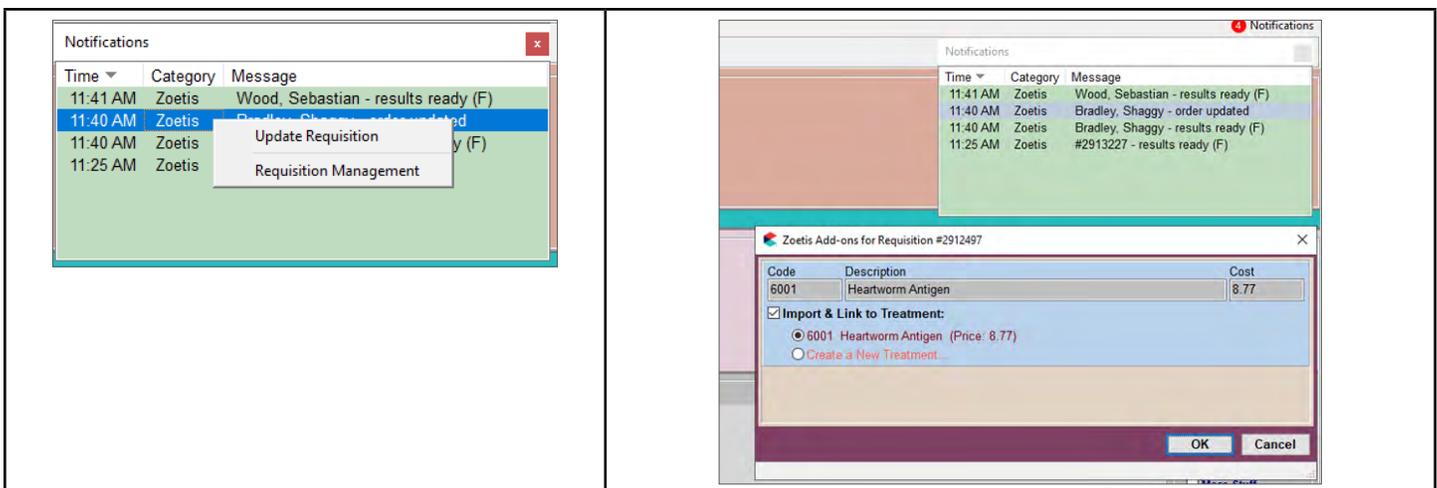
Requisition Management

Test results from Zoetis Reference Labs can be attached automatically to Avimark and saved to patient records. However, Requisition Management provides you with the option to go to **Requisitions** to edit a requisition and add on additional tests. You also can go to **Download Requisitions** to import orphaned results.

Customize View - Columns

If your version of Avimark does not include the columns you need in the Requisition Management view, you can customize the view by adding or removing columns as needed. To customize columns:

1. Click on **Services > Requisition Management > Download Requisitions** tab.
2. In the top half of the Columns dialog box, **right-click > View > Columns**.
3. On the **Drag & Drop** tab, locate the column(s) to add to Requisition Management.
4. Click and drag the column name to a position between existing columns. A double-set of green arrows will appear indicating where the new column will be placed.
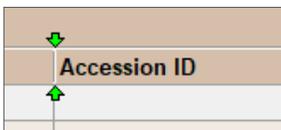
5. To remove a column from view, click on the column name and drag out of the column area. A large "X" will appear on the screen to indicate the column will be removed.
6. When finished, click to close Columns.

Repeat the steps to add or remove columns from the bottom half of the Requisition Management window.

Edit Requisitions

To add tests to an already Sent requisition:

1. Select **Services > Requisition Management > Requisitions** tab.

2. **Right-click** on a requisition that has already been **Sent**.

3. Choose **Edit Requisition**.

4. In the **Edit Zoetis Requisition** window, select the tests to add to the sent requisition.

5. Click **OK**.

*Note: The **Check Updates** button can be used to see if there were any updates made to sent requisitions via the Zoetis portal. However, it is recommended that all updates to sent requisition be made in Avimark.*

Download Requisitions

Results PDF is attached to Medical History automatically when the Advanced Option **Auto import and attach Zoetis Lab PDF** is set to **True**.

To retrieve results:

1. Select **Services > Requisition Management > Download Requisitions** tab.

2. From **Lab Type**, select **Zoetis Reference Lab** from the drop-down list.

3. Click the **Load** button.

- Results being returned from the lab are displayed. When a requisition match is made, the requisition entry is displayed in **black**, indicating the **Imported** status. To display imported results, select the Medical History Requisition entry in Medical History for the imported entries.

- Results that were **updated** via the Zoetis portal, the requisition shows in a **teal** color.

- Information displayed in **orange** indicates **orphaned** results (patient unassigned), for which no automatic association could be made. These results can be manually associated with the correct entries.

Import orphan results:

1. **Right-click** on the requisition that did not have results imported.

2. Click on **Import Results**.

3. If necessary, click the **elipsis** button next to **Client, Patient** to search for the client and patient the results should import to.

4. You can choose to **Import & Link to Treatment** (or *Create a New Treatment*).
   ◊ You can choose not to import if the charge capture was already done for the test.

In the image above, the user opted to import the first test and capture the charge. The second test was already charged so it was not necessary to import and link the treatment again.

5. Click **OK**.

Downloading a PDF of Results

1. Go to **Services > Requisition Management > Download Requisitions** tab.

2. Click the **Load** button.

3. On the requisition **right-click > Download PDF** from the shortcut menu.

This option lets you manually download any result PDF file, whether or not the **Auto import and attach Zoetis Lab PDF** option is set to **True**. The PDF files will be attached to the requisition line in the patient's medical history under file attachments.