Tricefy Personal Settings

Personal Settings are in the User Menu, at the top-right corner of the screen. These settings include:

- Profile: Change your log-in password, update your display name or phone number, show your Uplink status, and reset your settings
- Change Password: Select a new password
  - Clinic administrators can require users to reset their passwords after a predetermined length of time. This option is configurable within your clinic's Account Settings.
- Memberships: Leave your account or accept an invitation to a new account
- Notifications: Turn notifications on and off for when a new study, consult or note is added
- Two Factor: Enable two-factor authentication to provide an extra layer of security. Users will receive a code via text when initially logging into Tricefy.

When you are done modifying settings, select Update to save your changes.

Account Administrators

Account Settings are in the User Menu, at the top-right corner of the screen, if you are an account administrator. These settings include:

- Account Settings (Basic): Adjust how long patient landing pages stay active and implement password rules for additional security
  - See Page 2
- Members and Privileges: View, delete, invite, and grant administrative permissions to account members
- User Identifiers: View operators and physicians
- Automation Setup: Create automatic processes, such as automatic labeling, automatic patient sharing, or automatic routing
  - See Page 3
- Worklist Fields: This option is intended for athenahealth users
- Uplinks: View, install, and monitor Uplinks
  - Refer to the Uplink Installation Quick Start Guide
- Labels: View, edit and delete current labels
  - See Page 4
- Statuses: Create, edit, and delete statuses
- Local Study Routes: Local routing configuration between multiple images devices
- Image Branding: Create and position where your clinic's logo is displayed on landing pages and emails
  - See Page 4
- Message Branding: Customize the messaging on patient landing pages, patient-facing emails and text messages
- Invoices: View payment information

Additional Resources for IT Departments (for monitoring & troubleshooting)

- API Tokens: Allows programmers to integrate Tricefy with existing applications, such as EMRs and reporting systems
- Trice Log: History log of all activity (logins, annotations, patient links, study viewed, etc.) with user, date, time stamps, status (success/failure)
- Export Log: History log of all data exports/downloads with user, date, time, file type, and instance number(s)

Account Settings

- Name: The name of your account; this is typically the name of the clinic but it can be any shortened or modified version
- Contact Email: How we can contact you (or the main administrator)
- Time Zone: The time zone based on where you are at in the world. There are a lot of options - choose one from the drop-down menu.
- Language: Tricefy is available in different languages - options are populated in the drop-down menu. Please note that this will affect all users of your clinic.
- Country Code: Specifies the country code to input when sending text messages. Choose your country from the drop-down menu.
- Patient Link Code: Entering a passcode into this field will require patients (and anyone else attempting to view images) to enter that passcode to view their landing page.
  - If this field is blank, a passcode will not be required unless the study contains non-DICOM files (such .jpg images, PDF documents or medical reports). If the study contains such files, the patient will be prompted to select a password for their landing page.
  - If you decide to add or change a Patient Link Code, any previous passwords will still work for their respective links (in other words, you can add a code or change a code at any time without affecting your patients).
  - Removing the passcode from this field will eliminate the need to enter it on already existing links
- Default Patient Links Expire: Determines how long a patient's landing page will remain active. 90 days is the most common choice - choose an option from the drop-down menu.
  - After 90 days (or however many is chosen from the drop-down), the patient's link will no longer work; you can send them a new one, which will remain active for another 90 days
- Pixel Data Optimization: Determines how images are processed when uploaded to Tricefy
  - Default is our recommended setting that preserves image quality while managing file size

Password Rules

These rules affect your account member's passwords to implement additional security:

- Timeout: Signs out of a user's account after a certain time of inactivity (five minutes, 10 minutes, or 15 minutes - choose an option from the drop-down menu)
  - Users will have to log back into Tricefy when they return
  - Select None to disable this feature
- Passwords Expire In: Prompts users to create a new password every 15, 30, or 90 days - choose an option from the drop-down menu
  - Select Never to disable this feature
- Deny Old Password: Locks a user out of their account after a certain number of incorrect password attempts (1-5 - choose an option from the drop-down menu)
  - Users will have to reset their password if locked out of their account
  - Select Off to disable this feature

Automation rules

Automation rules automatically process certain kind of images using metadata (email addresses, names, labels, etc.) that are embedded in the study based on the content entered into the imaging system. Tricefy uses this information to automatically send studies to patients, apply labels, and other automated actions. To create an automated process, select **Automation Setup** within the Account Settings.

Existing processes are listed under **Saved Automations**:

- The type of automated process is listed under **Automation Type**
- The **Up** and **Down** buttons change the order that your automations are listed
- At any point, existing automations can be modified by selecting the **Edit** button
- Select **Delete** to remove an automated process
  - Once removed, this action cannot be undone
  - To disable a process without removing it entirely, select **Disable** instead
  - Select Enable to re- activate the process

To create a new automated process, select **Set Up New Automation**:

1) Type a name into the **New Automation Name field**. This name should describe the intended automatic process
2) Choose a process from the **Select Automation Type** drop-down menu:
   - **Automatically send patients a link to their images**: This option scans DICOM fields for contact information (email addresses and phone numbers) to send a patient link
   - **Automatically route images to another account**: This option allows physicians working with multiple Tricefy accounts to route study images to the appropriate account
   - **Automatically route images to an external DICOM receiver**: This option routes exams to the external DICOM receiver that was prompted during Uplink installation
   - **Automatically label images**: This option labels study images based on content that was entered into the ultrasound system during the exam
   - **Automatically share images with physicians**: This options scans DICOM fields for contact information of other physicians, like a referring physician, to share study images.
   - **Automatically assign status to images**: This option applies a status to a study based on specified conditions.

Select the **Create Rule** button to create the automated process; the system displays a configuration screen. Except for integrations, automated processes are triggered by conditions specified on this screen.

Triggering Events and Conditions

Every automation rule requires three things:

1) **Name:** To identify each automatic process
2) **Triggering Event:** What makes the automation occur
   - Some automations can only occur after the file is stored (like sending to patients)
   - Other automations allow you to run the process before or after the file is stored
3) **Conditions:** When the automated process should run, such as when a certain ultrasound system is used or when a specific operator performs an exam
   - Conditions are not required for creating an automatic process. If no conditions are added, the automatic process is always applied. Select the red X to remove a condition.

- Select an option from the **When** drop-down menu:
  - Choosing an option under **Instance** runs the process when a specific imaging machine is used
    - Type the name of the imaging system that will cause the automation to occur
  - Choosing an option under **DICOM Fields** runs the process when information is entered in the specified DICOM field during the exam
    - Type the DICOM field that will cause the automation to occur

Select **Update** to create the condition. You can add multiple conditions by selecting the **Add New Condition** button again.

Additional content on this screen varies depending on the process that you are automating.

Labels

Select **Labels** in your Account Settings to view, edit and delete labels that have been applied to studies.

- All labels that have been used by members of your clinic are listed under **Name**
- The number of times the label was used is shown under **Studies**
- If a label does not have any studies currently using it, you can delete it by selecting **Delete**
- To change a label, select the **Edit** button
  - Editing a label will change the label on all studies that have it applied

Labels are useful for organizing, searching and filtering data.

- Refer to the Searching & Filtering Quick Start Guide

When automation rules are configured, labels are automatically applied. If your account automatically sends patient links or performs any other automatic process when studies are uploaded, these labels cannot be modified or removed.

Image Branding

Select **Image Branding** in your Account Settings to change the logo that is shown on patient emails, landing pages, and images.

- **Overlay:** Clinic logo that is placed on ultrasound images. It is recommended that this image have a transparent background (file type for transparent backgrounds must be .png)
  - Select **Choose File** to select a logo from your computer/network
  - Choose a **Position** from the drop-down menu to specify where to display your logo
  - Uncheck **Auto-scale** to upload the image using the original size; otherwise, it will automatically be scaled to our default (recommended) size
  - Select **Update Overlay** to save
- **Logo**: Clinic logo that is shown on outgoing patient emails. It is also located at the top of the Landing Page. This can be any branding content you prefer.
  - Select **Choose File** to select a logo from your computer/network
  - Uncheck **Auto-scale** to upload the image using the original size; otherwise, it will automatically be scaled to our default (recommended) size
  - Select **Update Logo** to save