

Tracefy



Administrator's Integration Manual

1.0 Pre-requisites

This manual is intended for athenahealth users specifically when integrating with Tricefy. This manual assumes users are already proficient using the athenahealth platform and the Tricefy software.

1.1 Resources

- <http://tricefy.help/> - Trice Imaging's Help Center
- <http://tricefy.help/help/athenacategory> - Workflow diagrams
- <http://tricefy.help/help/athenahealth> - Using Athena integration to view patient links, interface statuses, and error messages (includes video tutorial)
- <http://tricefy.help/help/automation> - Creating automation rules:
 - Automatically sending exam links to the patient chart
 - Automatically sending PDFs (thumbnails + cover page) to the patient chart
- <http://tricefy.help/help/athena> - Creating automation rules specific to Athena
- www.tricefy.help/help/worklist - Assigning Worklist fields

2.0 Interface Requirements

1. [Athena authorization and consent form](#) completed and approved
2. Athena practice ID
3. Athena department ID(s) - see *Figure 1*
4. Configured Athena automation rule in Tricefy's Account Settings (see Section 2.1)

Athena department IDs are located within athenahealth > Settings > Admin Billing > Departments.

The screenshot shows the athenaNet interface. On the left is a sidebar with various navigation links. The main content area is titled 'General Display Settings' and 'Billing Display Settings'. A 'MY CONFIGURATIONS' dropdown menu is open, showing options like 'Practice Manager', 'Billing', 'Clinicals', etc. A table titled 'Departments' is visible, listing department IDs and names. Red arrows indicate the path to the 'Departments' table and the 'Billing' configuration option.

ID	Name	Display name	Group	Group	Group
143	5 Peaks			5 Peaks Medical Organization	6 Hills Medical Associates
82	6 Hills		(770) 547-0276	6 Hills Medical Associates	6 Hills Medical Associates
150	7 Hills Department	7 Hills Department	(617)402-1111	7 Hills Medical Group	7 Hills Medical Group

Figure 1

Department IDs are required for locating a provider (Section 2.1.1) and for returning helpful worklist results (Section 4.0). Contact your Athena representative for assistance obtaining the practice and/or department IDs.

2.1 Configuring Automation (in Tricefy)

Automation rules in Tricefy allow automatic processes to be applied to examinations. Creating an Athena integration rule will automatically send exams and/or PDF documents containing exam images directly to the patient chart in Athena (this is further explained in Section 3.0).

To create the rule, refer to <http://www.tricefy.help/help/integration> and <http://www.tricefy.help/help/athena>.

2.1.1 Providers

In order to deliver exam links or PDF documents to the patient chart, Tricefy must know the Provider ID. If **Always Use Default Provider** is selected in the automation rule, Tricefy will assume this is the provider to use.

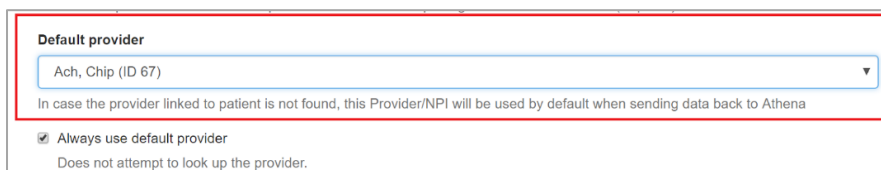


Figure 2 - refer to Account Settings -> Automation

- When **Always use Default Provider** is checked, Tricefy will only send an exam link/PDF to that provider (selected in the drop-down menu)
- If **Always Use Default Provider** is not checked, Tricefy will use the Ordering Provider ID that was used in the Athena order. To do this, **Attach Imaging Results to Ultrasound Order** must be checked in the automation rule

To review the current settings of your automation rule, access the Account Settings in Tricefy and select Automation. For additional instruction, refer to <http://tricefy.help/help/automation>.

3.0 Sending to the Patient Chart

In order to send an exam link or PDF (of exam contents) to an Athena patient chart, a valid patient ID must be entered into the ultrasound system:

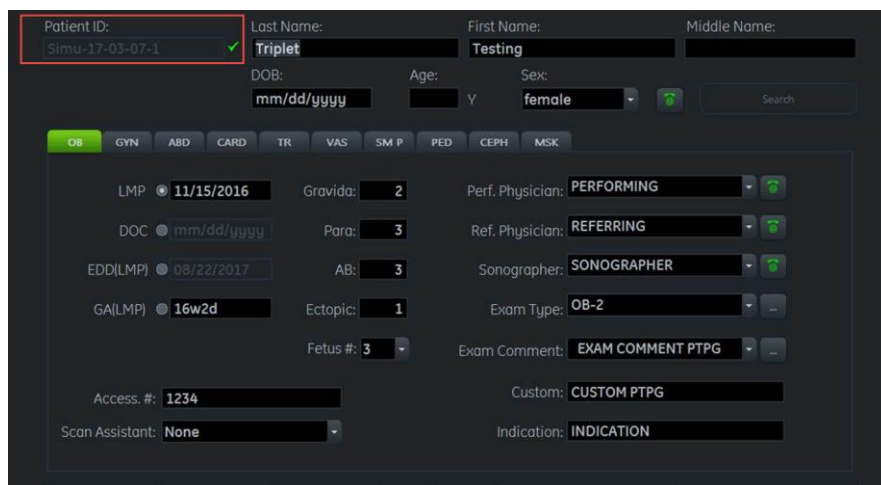


Figure 3 - Patient ID shown in a Voluson ultrasound system

If the patient ID is not valid, the exam link and/or PDF cannot be sent the patient chart. If your exam did not send because of an invalid Patient ID (refer to Section 3.1, Figure 9), correct the ID using your ultrasound system (delete and resend the exam using Tricefy). You can also correct the Patient ID using the Tricefy software: <http://tricefy.help/help/correctpatient>.

Anything else entered into the ultrasound system is not necessary for the interface to function.

In addition, there must be an active provider associated with the patient. As explained in Section 2.1.1, there are multiple ways for Tricefy to acquire this information:

1. **Default Provider** (in Tricefy) - when **Always Use Default Provider** setting is enabled in the Tricefy automation rule (explained in the section above), the system will use this provider (if Always Use this Provider is not checked, skip to #2)
 - If the Default Provider imported to Tricefy is not valid, the exam will not send (skip to Section 3.1)
 - If a Default Provider has not been imported to Tricefy, the system will attempt to identify the provider by continuing with the following methods
2. **Ordering Provider** - when **Attach Imaging Results to Ultrasound Order** is enabled in Tricefy automation rule, the system will use the provider attached to the order.

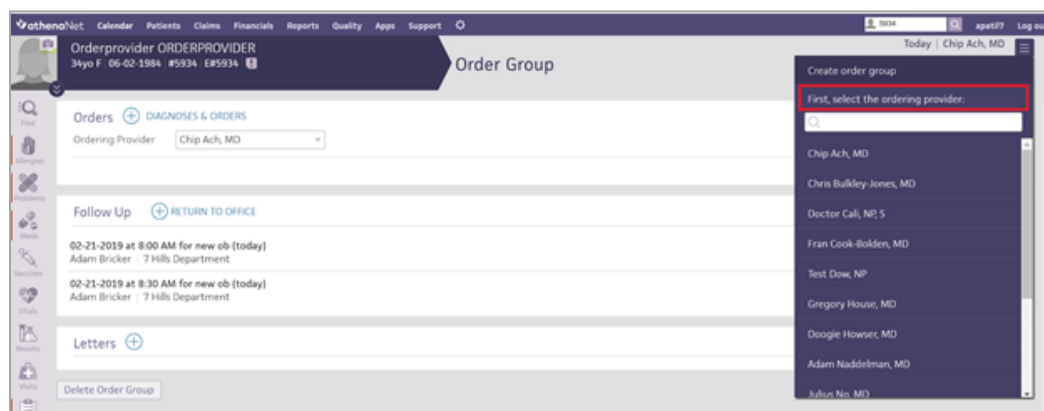


Figure 4

3. **Rendering Provider** - If the Default Provider and Ordering Provider are not available (or if the order has is not placed yet), Tricefy will use the Rendering Provider listed in the Encounter
 - In Athena, an Encounter is created once a patient checks in to a scheduled appointment
 - A Rendering Provider is the provider that will review the examination

Figure 5

4. **Usual Provider** – If Tricefy cannot locate a Default Provider, Ordering Provider, or Rendering Provider, it will use the Usual Provider as listed on the Patient Quick View in Athena:

Figure 6

5. **Default Provider** (again) – Although unlikely to not locate a Usual Provider (because Athena requires a Usual Provider for each patient), if Tricefy is unable to find any providers using the steps above, it will use the Default Provider
 - This differs from #1 because it use the Default Provider even if Always Use Default Provider is not checked in the automation rule.
 - This will be final attempt to send the exam

3.1 Unable to Send to Patient Chart

If Tricefy cannot find a valid Provider or if a valid Patient ID was not entered into the ultrasound system, it cannot send an exam link or exam PDF to the patient's chart; the interface status will read, **Fail**, on your Study List:

Tricefy						
Studies						
	Patient ID	Full Name	Study Date	Study Details	Interface Status	
TE	Alphanum123	alphanumeric pid	2019-01-04 2:38 PM MST	1 6 3 1	Fail	
TE	9999999999	PID NOTFound	2019-01-04 2:13 PM MST	1 5 2	Fail	
TE	14fd5cd-b4e5-46ed-ae6d-...		2019-01-03 12:51 PM MST	1	Success	

Figure 7

Selecting **Fail** will display additional information, including an error message:

Key	Value
Interface Type	Integrations::Athena
Created	2018-11-08 1:46 PM PST
Payload	{ "departmentid": "150", "providerid": "", "includefilelink": true, "ssotarget": "https://tricefy.com/permalinks/studies/1.3.6.1.4.1.35190.1.3.20181108.56553199901"
Other Info	{ "message_type": "imaging_result", "pid": "8000", "error": "Athena patient 8000 does not have a Provider ID, and no default was provided.", "status": "fail" }

Figure 8 – Missing Provider ID error message

Resend Study Link to Athena	
Key	Value
Interface Type	Integrations::Athena
Created	2019-03-14 9:04 PM MST
Payload	{ "departmentid": "150", "providerid": "101", "includefilelink": true, "ssotarget": "https://tricefy.com/permalinks/studies/1.3.6.1.4.1.35190.1.3.20190301.100019110960.html?saml=athena", "facilityid": "12008017", "encounter_id": null }
Other Info	{ "message_type": "imaging_result", "pid": "898988888", "resend": true, "status": "fail", "error": "The Patient ID or Department ID is invalid." }

Figure 9 – Invalid Patient ID error message

Correct the error:

- Missing or Invalid Provider ID: Either add a Default Provider to your Tricefy automation rule or specify a provider within the order or encounter
- Invalid Patient ID: Either delete the exam in Tricefy, correct the ID on the ultrasound system, and resend or correct the ID using the Tricefy interface: <http://tricefy.help/help/correctpatient>
- Invalid Department ID: Correct the Department ID entered in the Tricefy automation rule

After you've corrected the data, select the **Resend Study Link to Athena** button, as explained at www.tricefy.help/help/athenahealth.

3.2 Viewing Exam Links and Exam PDFs

Refer to <http://tricefy.help/help/athenahealth> for instructions and video tutorial for receiving exam links and exam PDFs that are sent to the patient chart.

4.0 Worklist

Tricefy queries appointments in Athena to get scheduled exams and patient information.

Note: Appointments are scheduled events in the future. Once a patient checks in to the office, an Encounter is created.

For instructions, refer to <http://www.tricefy.help/help/worklist>.

4.1 Searching

Use your ultrasound system to search for checked-in appointments (encounters). The following is required to obtain results:

1. Appointment must exist for patient ID or patient name within the specified date range
 - a. If a date range is not specified, Tricefy will return all checked-in appointments for the current day
 - b. If a Patient ID is not entered (but date range is), Tricefy will return all checked-in appointments for the date range
 - c. If the search includes both the Patient ID and date range, Tricefy will return all appointments within given date range regardless of appointment status

4.2 Results

The following data will be prepopulate into your ultrasound system (if the data is included in the Athena order). This will prevent needing to manually enter information.

- patient_name
- patient_id -> Athena always returns enterprise (E) ID (see Figure 9)
- patients_birth_date
- patient_sex
- patient_address
- patient_phone
- referring_physician
- performing_physician_name
- scheduled_performing_physician_name
- **Study_description** (sometimes called "Exam Type" in ultrasound)
- scheduled_procedure_start_date
- scheduled_procedure_start_time

**Minimum fields that *should* populate on the ultrasound patient screen in bold



Figure 9 – Enterprise ID

5.0 Creating a Test Patient in Athena (Optional)

Create a test patient in Athena to make sure you Athena integration is setup properly:

1. Create a Patient: Patient -> New Patient Registration (Usual Provider mandatory)
2. Save and add Insurance (select - **Self Pay**)
3. Add appointment - On Quick view -> Appointment -> Schedule-> Select today's date -> create a new slot -> Select the Appt Provider and all other mandatory fields [Appointment is created]
4. Go to appointment workflow (on the appt page)
 - a) Appointment has 4 stages: Check in-Intake-Exam-Signoff-checkout
 - b) Select Start Check-in
 - c) Complete the check-in procedure [Encounter is created]

- d) If "Verify Patient by Encounters" is checked on the Automation rule the encounter should be created.
- 5. Upload an exam/study with the study date matching the appointment date
- 6. Go to Quickview -> view chart-> Imaging Results -> Lab Result -> Imaging/diagnostic result -> View report header-> Trice Preview [\[For Imaging Results\]](#)
- 7. Search -> Encounter document [\[For PDF\]](#)
- 8. Patients -> Communicator box -> Clinical Inbox [To check as a provider if any clinical document has arrived]