

## Automation - Overview

Last Modified on 2021-05-20 18:28

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](#).

<a href="#">Account Overview</a>	<b>Automation Setup</b>
<a href="#">Account Settings</a>	Automation uses the information entered on the imaging device (e.g. ultrasound machine) during a study to automatically link, apply labels, route to a different account, set a status, or share with a referring or consulting physician.
<a href="#">Members and Privileges</a>	
<a href="#">User Identifiers</a>	
<b>Automation Setup</b>	
<a href="#">Uplinks</a>	
<a href="#">Labels</a>	
<a href="#">Statuses</a>	

Saved Automations	Automation Type					
12	Automation::PatientLink	up	down	edit	delete	disable
123	Automation::Labeling	up	down	edit	delete	disable
1234	Automation::Sharing	up	down	edit	delete	disable
12345	Automation::AccountRouting	up	down	edit	delete	disable

[Set Up New Automation](#)

Existing processes are listed under **Saved Automations**. The type of automated process is listed under **Automation Type**, which are explained below. The **Up** and **Down** buttons change the order that they're listed.

At any point, existing processes can be modified by selecting the **Edit** button next to each specific process.

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. Below is an example of a disabled process; select **Enable** to re-activate the process.

[Test Patient Links Automation](#)    Automation::PatientLink    up    down    edit    delete    enable

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

### Set Up New Automation

**New Automation Name**

**Select Automation Type**

Automatically send patients a link to their images ▼

**Automations**

- Automatically send patients a link to their images
- Automatically route images to another account
- Automatically route images to an external DICOM receiver
- Automatically apply custom label
- Automatically label images based on DICOM field
- Automatically share images with physicians
- Automatically assign status to images
- Automatically create and attach a PDF report of the study



First, type a name into the **New Automation Name** field. This name should describe the intended automatic process.

Next, choose a process from the **Select Automation Type** drop-down menu. Additional instructions for each automation type are linked at the end of this article.

- **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 apply custom label:** This option labels studies with the content of your choosing
- **Automatically label images based on DICOM field:** This option labels study images based on content entered into the imaging system during the exam
- **Automatically share images with physicians:** This options scans DICOM fields for contact information of other physicians, such as a referring physician, to share study images.
- **Automatically assign status to images:** This option applies a status to a study based on specified conditions.
- **Automatically create and Attach a PDF report of the Study:** This option auto-generates a compilation of study images into a PDF with a summary cover page

If your clinic uses Tricefy through an EMR, such as Allscripts or athenahealth, select one the appropriate process under **Integrations**.

- Select **Automatically Generate Outbound HL7 Message** if your EMR is listed

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:

**Name**

Something that identifies what kind of automation is performed

**Triggering Event?**

After new file is stored

**When should this automation occur?**

Add new condition



- **Name:** To identify each automatic process
- **Triggering Event:** What makes the automation occur
  - Some automations can only occur after the file is stored (such as sending to patients)
  - Other automations allow you to run the process before or after the file is stored, or when the status has been changed.

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- **Conditions:** When the automated process should run, such as when a certain ultrasound system is used or when a specific operator performs an exam
  - To add a condition, select **Add new Condition**

\*\*\* If selecting Study Status Changed as the triggering event, it is recommended to include a Study condition (to specify what the new status should be in order to trigger the automation. Not adding a condition will trigger the event any time the status is changed).

Next, select an option from the When drop-down menu:

## When should this automation occur?

When Status  Equals  

- Study
- Status**
- Instance
  - Destination AE Title
  - Destination AE Title Extension
  - Is or contains a PDF
- DICOM Fields

- Choosing an option under **Instance** runs the process for specific instances
  - **Destination AE Title** or **Extension** will run the automated process when a specific imaging system is used
    - We created two stores when configuring the ultrasound system
      - These stores are typically named "archive" and "patient" - [refer to your DICOM settings](#)
      - Enter the name of the store into the Equals text box
  - **Is or contains a PDF** will run the automated process when the study contains a PDF document
    - Leave the Equals text box empty
- Choosing an option under **DICOM Fields** will run the process when information is entered into that specific DICOM field during an exam
  - Type information that needs to be entered into the Equals text box

You can add multiple conditions by selecting the **Add New Condition** button again. Select the red **X** to remove a condition.

It is important to note that conditions are not required for creating an automatic process. If a condition is not added, the automatic process is always applied

Additional content on this screen varies depending on the process that you are automating. Refer to the following links below for further instructions:

 [Setting up automatic Patient Links](#)

 [Setting up automatic routing to a different Clinic Account or External DICOM Server](#)

 [Setting up an automatic Labels or automatic Statuses](#)

 [Setting up automatic Doctor Sharing](#)

 [Setting up automatic PDFs of study images](#)

 [Setting up EMR Integrations \(Allscripts, athenahealth\)](#)

 [Setting up HL7 Messages](#)