



Automation - athenahealth

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Creating an automation rule will send examinations to your patient charts (assuming the patient ID and Order ID exist in Athena). How this works (and what it looks like) is explained further below.

First, please refer to the following steps to get started:

- **Step 1:** [Create your automation rule](#) - select **athenahealth** as the Integration Type
- **Step 2:** [Add conditions](#) that trigger this automation

Note: If conditions are not added, the automation will be applied to all examinations.

- **Step 3:** Complete the following information:

Practice ID
required
The Athena Health Practice ID
Integration Version
Athena API
Selects the method used to integrate with Athena. HL7 is older and should only be used for legacy integrations.
Department ID's
required
A comma-separated list of Athena Department ID's used for importing records via Athena API (required)
Default provider
In case the provider linked to patient is not found, this Provider/NPI will be used by default when sending data back to Athena
This dropdown will appear disabled until at least one Provider is imported from Athena
<input type="checkbox"/> Always use default provider Does not attempt to look up the provider.
<input checked="" type="checkbox"/> Verify Patient by Encounters When enabled, the link will only be sent if an encounter can be found for the patient on the study date (recommended).
<input type="checkbox"/> Send PDF Report to Patient's Chart The first PDF (encapsulated in DICOM or not) of each study will be matched to the patient in Athena and sent as a document attachment.

- **Practice ID:** This is a required field; refer to the ID number provided by Athena
 - Contact your Athena representative if you do not know your Practice ID
- **Integration Version:** Unless you are using an older system, leave **Athena API** selected.



- If you are using a legacy system, select HL7 from the drop-down menu and select an option under **Default Provider**
 - **Default Provider** will remain gray unless you have HL7 selected as your Integration Version. This is because the information is not needed when using their API
- **Department IDs:** Enter the ID numbers for the departments in which you'll be importing data
 - These numbers are located in AthenaNet by selecting the Settings Cog and choosing **Billing**, followed by **Departments** from the menu located on the left side of the screen
- **Default Provider:** This option is only available if you have imported Athena providers
 - Check **Always Use Default Provider** to always use the selected provider, otherwise the system will use a different set of logic to determine the provider
- Check **Verify Patient Encounters** to only send links if the patient checked-in to their scheduled appointment
- Check **Send PDF Report to Patient's Chart** to send a PDF document of each study
 - This PDF includes a cover page with the patient's name, thumbnails, and a link to the study
 - The remaining checkboxes on this screen (under PDF Destination) are only applicable if Send PDF Report to Patient's Chart is checked:

PDF Destination

Encounter Documents ▼

Where should the PDF be sent.

Send imaging result links
When enabled, Tricefy links will be sent to the patient's chart in Athena. Disable if you only want to send PDF reports or use modality worklist.

Attach imaging results to ultrasound order.
When enabled, Tricefy links will be attached to the matching order in Athena.

1) Choose an option from the drop-down menu:

- **Encounter Documents:** Selecting this option will send the PDF to the patient's chart (no review needed, auto-closed)
- **Imaging Results:** Provider will get notified to review the exam

2) Send Imaging Results Link:

- Checking this box will send a link to the patient's chart along with the PDF
- Not checking this box will only send the PDF document

3) Attach Imaging Results to Ultrasound Order

- Checking this box send a Tricefy link on the order within in Athena
- Not checking this box will only send the link to the patient's chart



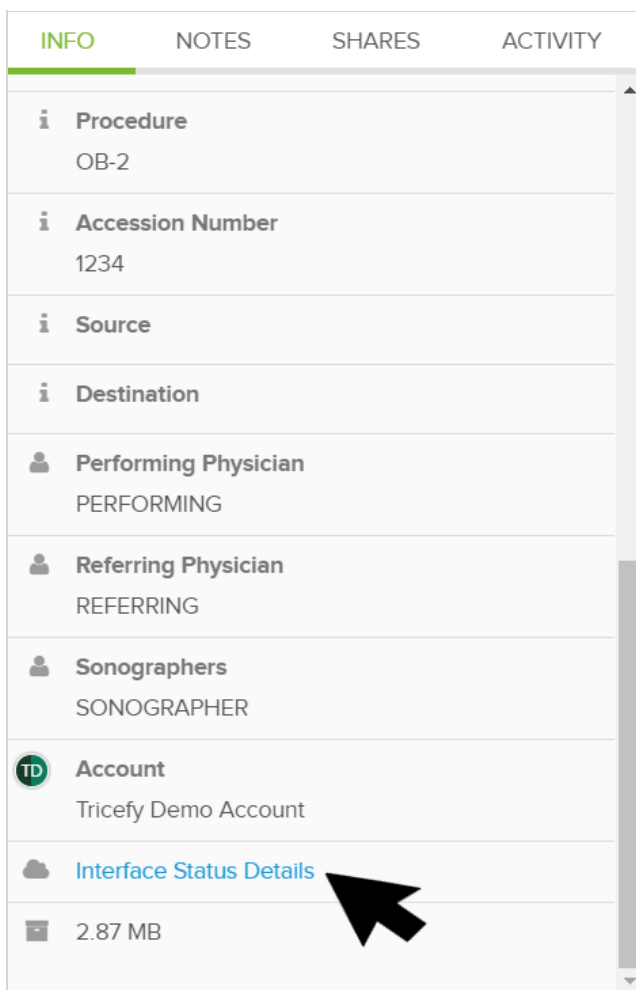
When all the required information is entered, it will read **Automation rule status Valid** at the bottom of your screen. Select **Update Athena** to save the information. Your Athena Automation is now configured.

How it Works

An examination is uploaded to Tricefy (either by using your imaging system or the software itself). If the Patient ID, Encounter ID (Appointment Date and Time) and Order ID (Accession ID) exists in Athena, the study will be sent to the patient's chart.

You can confirm it was sent by selecting the study on your Study List and opening the side Info Panel. Scroll towards the bottom of the panel and select the **Interface Status Details** link.

Note: This link is only available for Athena users.



If the status is "success" (shown below in the **red** box), it means that the examination was successfully sent to the patient's chart:

Back Interface Statuses for Study: 2017-11-17 MST - TEST TEST

Resend Study Link to Athena

Key	Value
Interface Type	Integrations::Athena
Created	2017-11-17 12:40 PM MST
Payload	{ "departmentid": "5243", "providerid": "1782", "includefilelink": true, "ssotarget": "https://tricefy.com/permalinks/studies/1.2.276.0.26.11.2.2017.358.70807.6093685.html?saml=athena", "facilityid": "12008017", "tietoorderid": "63832914", "accessionid": "63832914", "encounter_id": "10112556" }
Other Info	{ "pid": "2058600", "status": "success", "imagingresultid": "63833634" }

- Select **Back** to return to your Study List
- Select **Resend Study Link to Athena** to send another link to your patient's chart

If the status is "failed," it means the examination was not sent to the patient's chart. A failed status will include an error message (shown below in the blue box):

Key	Value
Interface Type	Integrations::Athena
Created	2017-11-22 1:00 PM MST
Payload	{ "departmentid": "1", "providerid": "1", "includefilelink": true, "ssotarget": "https://tricefy.com/permalinks/studies/1.2.276.0.26.11.2.2017.363.44084.8371092.html?saml=athena", "facilityid": "12008017", "encounter_id": "" }
Other Info	{ "pid": "24848", "error": "Athena order not found for patient 24848. Order ID not linked.", "status": "fail" }

Failures are usually because the Patient ID or Order ID was not found in Athena. You can correct any erroneous information in Athena and return to this screen to resend the examination.

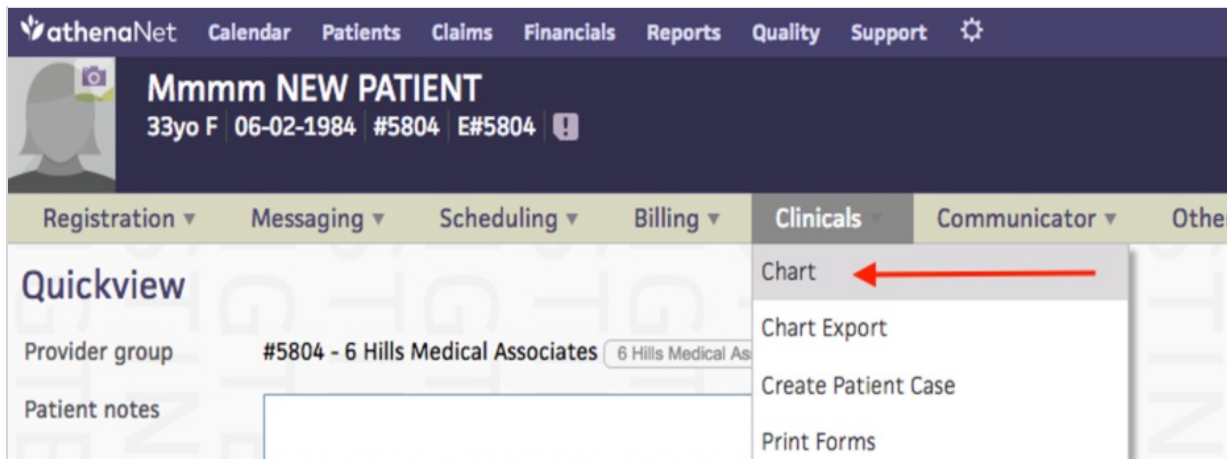
Patient IDs can also be corrected using the Tricefy interface (resend the study after the ID is fixed).

[Correcting the Patient ID](#)

Viewing the Exam in Athena

To view the exam using Athena:

- 1) Open your patient's chart:



- 2) Select the icon on the left side of the screen to open Imaging Results

3) Select the link listed under Imaging Results:



4) Select **View Report Header** on the upper-right of your screen (next to Print)

5) Select the Custom Link titled **Trice Preview**:



6) If you are currently not logged into Tricefy, you will be prompted for your password. If you do not have a Tricefy account, you will be asked to create one.

Once you are logged in, the examination will display in the [Tricefy viewer](#) .