



Finalizing a Report

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Anyone with permissions to create a report can also finalize the report (these are separate permissions that can be turned on and off by calling Tricefy Support).

Once a report is finalized, it is saved as a PDF document.

Selecting the pen icon (shown below in the blue box) will open a pending report in the editor (for those with permission to modify templates). Selecting **Finalize** (shown below in the red box) will insert your signature and finalize the report. Once a report is finalized, it is saved as a PDF document. To make changes to a finalized report, refer to the [Amending a Finalized Report](#) section of this article.

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Second Trimester Ultrasound

Patient Name: Heart and Vascular Study Study Date: 12/31/2017
Patient No: Cardiology Referring MD: Empty
LMP: Empty Sonographer: Empty
Final EDD: 12/15/2018 (20 weeks, 6 days) DOB: 01/01/1940 Age: 34
EDD (AUA): 12/19/2018 (21 weeks, 3 days)
Indications: Empty Pregnancies: Gravida Para

Procedure

Type: Empty
Technique: transabdominal

Fetal Evaluation, Placenta

Presentation: Vertex Fetal Heart Rate: bpm
Placenta: Posterior Cardiac Rhythm: Normal
Previa: Absent Gender: Not seen
Appearance: Normal Amniotic Fluid Volume: Normal
Cord Insert: Normal
Umbilical Cord: 3 Vessel

Fetal Biometry

	Value	GP	GA
BPD		%	Empty
HC		%	Empty

Finalize Pen icon Send to...

Smith Sally
2019-03-21 11:27 AM MST

STUDY INFO

- Study Date: 2019-03-21 11:27 AM MST
- Study Expires: 2044-03-21 11:27 AM MST
- Status: Done
- Attach File(s): Choose Files (No file chosen)
- Permalink
- Patient ID: 1.1.1.1.1.8
- Patient DOB
- Patient Gender
- Procedure
- Accession Number
- Source: automation
- Destination: report-pdf study-pdf
- Performing Physician

Footers

When a report is finalized, a footer is added to the bottom of each page with the patient's name, ID, and the date of the study. On the last page, the footer includes the date the report was finalized and, when applicable, amended.

Signatures

Signatures are only required if your Clinic Administrator added them to your reporting templates.

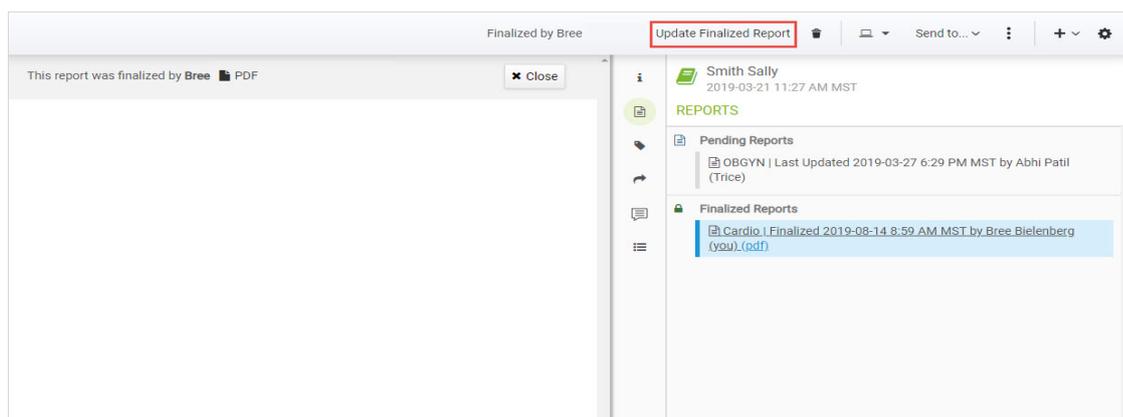
The signature that is used when signing the report is the signature uploaded to your profile settings.

[Learn more about your profile settings](#)

Uploaded signatures must be a picture file. The system will use a default font if a signature is not uploaded.

Amending a Finalized Report

To make changes to a report a finalized report, open the finalized version using the side info panel and click **Update Finalized Report** at the top of the screen:



This will return the report to an editable version and it will have to be finalized again.

Only those with permissions to finalize a report can use this feature.

Note for EMR users: Updating a finalized report will not replace the existing report in your EMR - once the report is updated and finalized, you will have to send the new version to your EMR.
