



2 MINUTE PEARLS

Importing/Exporting Templates



- Do you wish that you had the ability to “save” your S/O and Encounter templates when you move to another medical treatment facility?
- Would you find it helpful to be able to share multiple templates with other users without having to utilize the template search function?
- **Important:** The order sets within your templates will be lost when you move to another MTF since order sets are dependent on the local CHCS Server. (refer to AHLTA 2 Minute Pearl #4 – Order Sets on the Fly for instructions on how to easily add orders to your encounter templates)

Exporting Encounter Templates

Reminder: An encounter template contains one or more of the following items:

- S/O Template (also known as Notes Template)
- Diagnosis List
- Procedure List
- Order Set
- Other Therapies List
- Associated reasons for visit
- Associate problems
- Items to Autocite

To access Encounter Template Management:
 1) Open TOOLS folder
 2) Select TEMPLATE MANAGEMENT

Selections ...	Patient	CheckIn Time	Status	Reason for Visit	Comment
APPOINTMENTS FOR ALL PROVIDERS IN THIS CLINIC FOR TODAY PLUS INCOMPLETE.	BERG, OLAF V	03 May 2007 1335	CheckedIn	65 yo M, Abdominal Pain x 3 days	Bed 7: 120/80.
	SUAREZ, EDUARDO A	03 May 2007 1336	InProgress	45 yo M, Headache	Bed 3: 185/90
	ALEXANDER, EVELYN L	03 May 2007 1339	InProgress	2 yo F, Fever to 104 F	Trauma 1: 120.
	SUAREZ, EDUARDO A	08 Jun 2007 0933	InProgress		
	SUAREZ, EDUARDO A	11 Jun 2007 1223	InProgress		
	SUAREZ, EDUARDO A	13 Jun 2007 0926	InProgress		
	SUAREZ, EDUARDO A	13 Jun 2007 1001	InProgress		
	SUAREZ, EDUARDO A	22 Jun 2007 1003	InProgress		

USER, TEST: Military Clinical Desktop - Template Management (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Search View/Edit Template

3) Select SEARCH Button

4) Fill out Search Menu. Can select by name of template, owner type, etc...
*****If you only want to export templates from your favorite list, you only need to check the box "Select from my favorites only"*****

Encounter Template Search

Template Name

Begins With Contains Case Insensitive

Select from my favorites only

Owner Type <Any OwnerType>

Owners

Specialty

Associated Reason for Visit

Associated Appointment Type

Associated Problem

Replace Search Results Add to Search Results

Clear Search Cancel

5) Select SEARCH Button

File Edit View Go Tools Actions Help

Favorite Import Export Delete S/D A/P Set Columns Close

7) Select EXPORT Button

6) Hold down CTRL button and select each of the templates you wish to export

Folder List

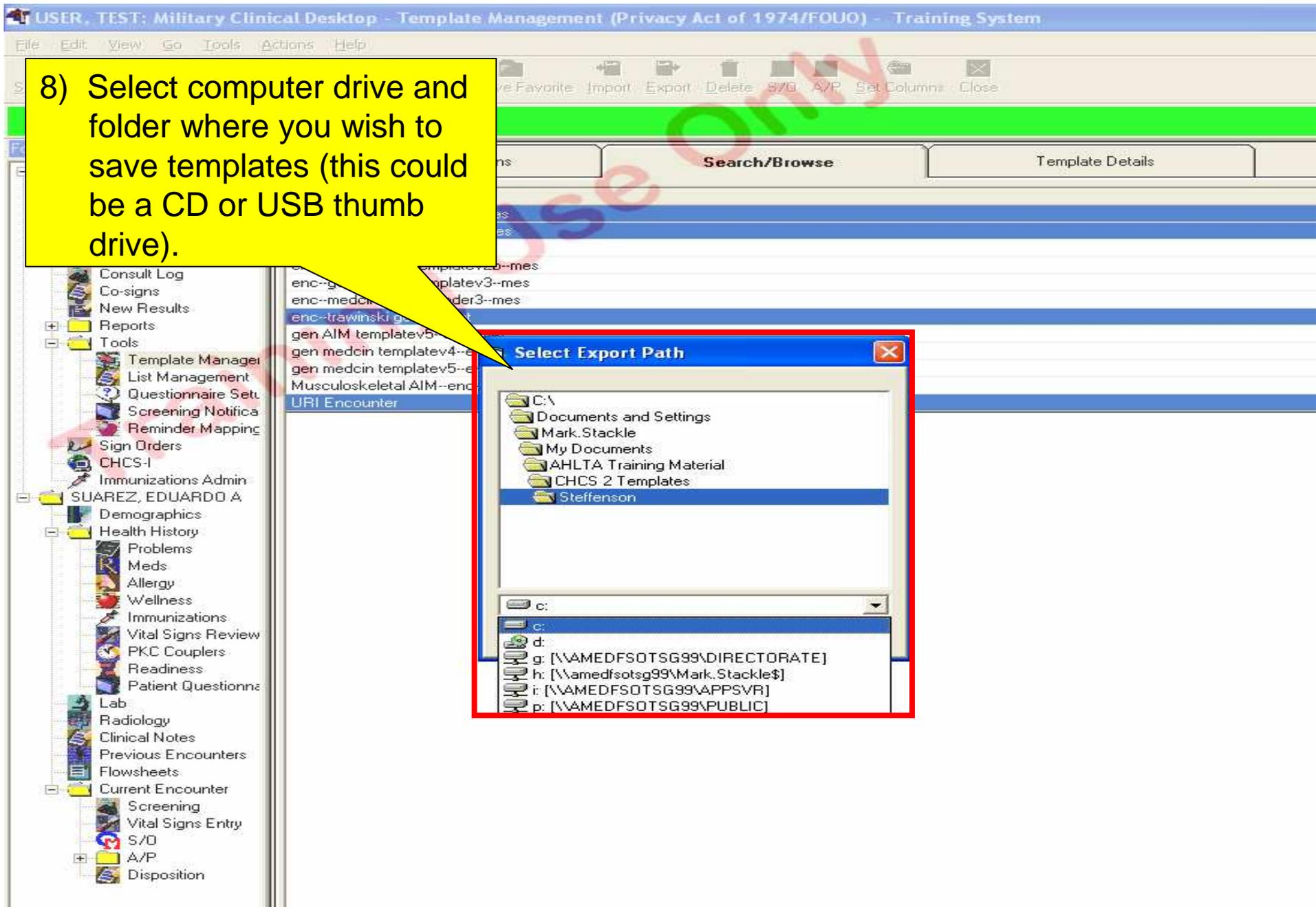
- Template Manag
- List Manage
- Questionnaire
- Screening Noti
- Reminder Map
- Sign Orders
- CHCS-I
- Immunizations Adm
- SUAREZ, EDUARDO,
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Rev
- PKC Couplers
- Readiness
- Patient Ques
- Lab
- Radiology
- Clinical Notes
- Previous Encoun

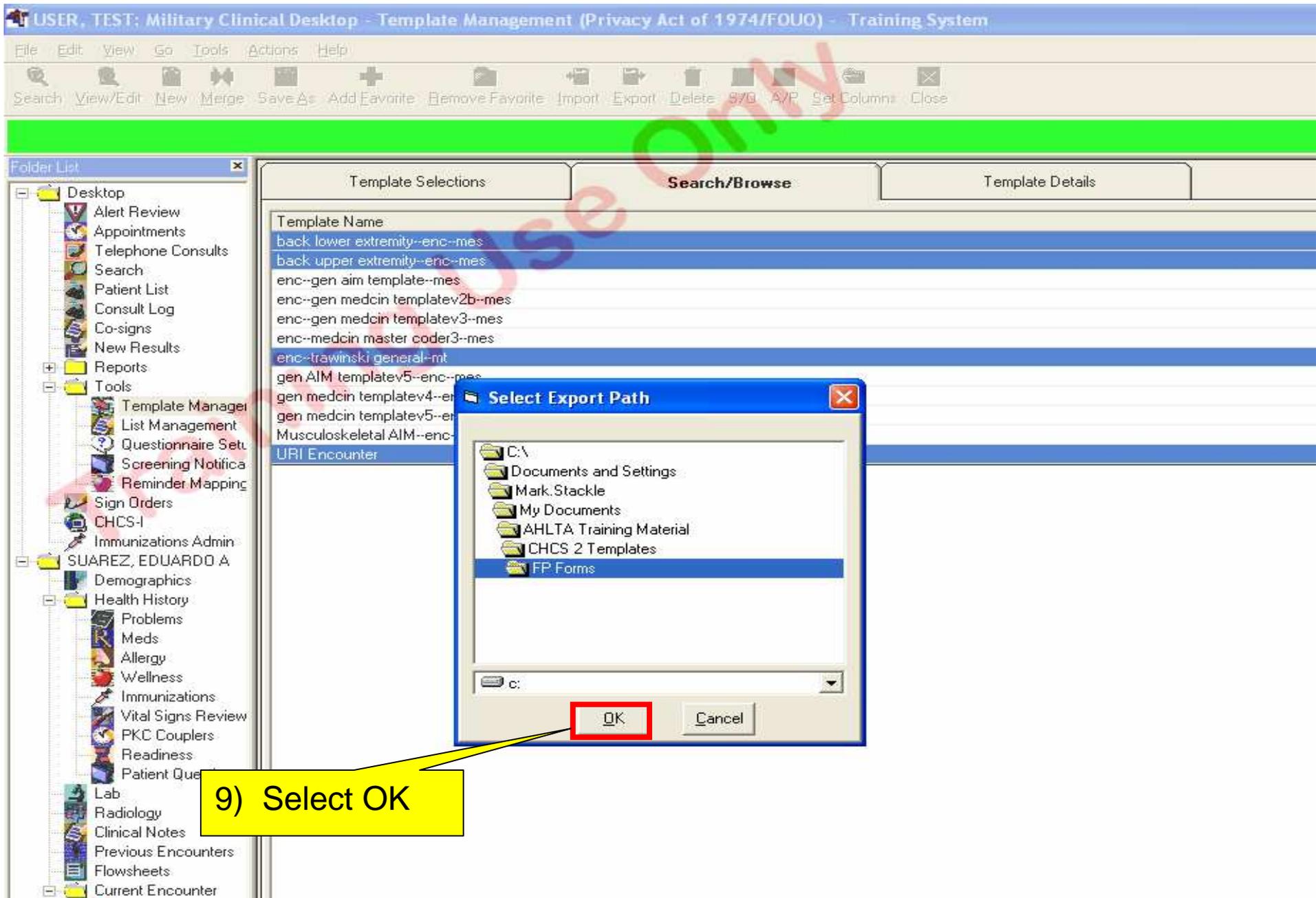
Template Selections Search/Browse

Template Name	ID	Scope	Owner	Shared	Favorite
back lower extremity--enc--mes	1415	User	USER, TEST	Yes	Yes
back upper extremity--enc--mes	1416	User	USER, TEST	Yes	Yes
enc-gen aim template--mes	1406	Clinic	CHCSII Test Clinic HC2T	Yes	Yes
enc-gen medicin templatev2b--mes	1405	User	USER, TEST	Yes	Yes
enc-gen medicin templatev3--mes	1409	User	USER, TEST	No	Yes
enc-medicin master coder3--mes	1408	User	USER, TEST	Yes	Yes
enc-trawinski general--mt	1407	User	USER, TEST	Yes	Yes
gen AIM templatev5--enc--mes	1441	User	USER, TEST	No	Yes
gen medicin templatev4--enc--mes	1414	User	USER, TEST	No	Yes
gen medicin templatev5--enc--mes	1439	User	USER, TEST	No	Yes
Musculoskeletal AIM--enc--mes	1442	User	USER, TEST	No	Yes
URI Encounter	1400	User	USER, TEST	Yes	Yes

eminders

- adequate Calcium Counseling
- Anti-Tobacco Counseling
- Blood Pressure Screen
- Regular Activity Counseling

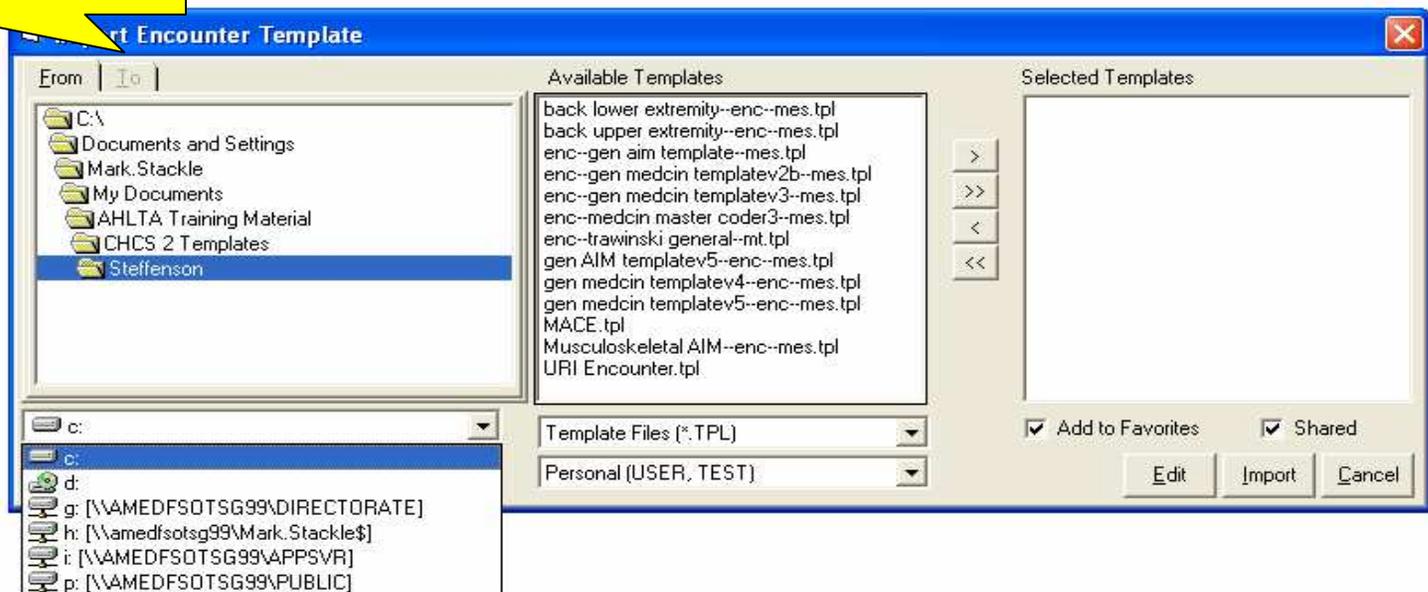




Importing Encounter Templates



2) Select Computer Drive and Folder where the templates you wish to import are located



USER, TEST: Military Clinical Desktop - Template Management (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Search View/Edit New Merge Save As Add Favorite Remove Favorite Import Export Delete Set

Folder List

- Desktop
- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
 - Template Manager
 - List Management
 - Questionnaire Set
 - Screening Notifica
 - Reminder Mapping
 - Sign Orders
 - CHCS-I
 - Immunizations Admin

Template Selections

Search/Bro

3) To select templates to import, either:
a) Select [>>] button which will import all available templates
b) Hold CTRL button, select each individual template, click [>] button to import only selected available templates

Import Encounter Template

From | To |

Available Templates

- back lower extremity--enc--mes.tpl
- back upper extremity--enc--mes.tpl
- enc-gen aim template--mes.tpl
- enc-gen medicin templatev2b--mes.tpl
- enc-gen medicin templatev3--mes.tpl
- enc--medcin master coder3--mes.tpl
- enc--trawinski general--mt.tpl
- gen AIM templatev5--enc--mes.tpl
- gen medicin templatev4--enc--mes.tpl
- gen medicin templatev5--enc--mes.tpl
- MACE.tpl
- Musculoskeletal AIM--enc--mes.tpl
- URI Encounter.tpl

Selected Templates

- C:\Documents and Settings\Mark.Stackle\
- C:\Documents and Settings\Mark.Stackle\
- C:\Documents and Settings\Mark.Stackle\

Template Files (*.TPL)

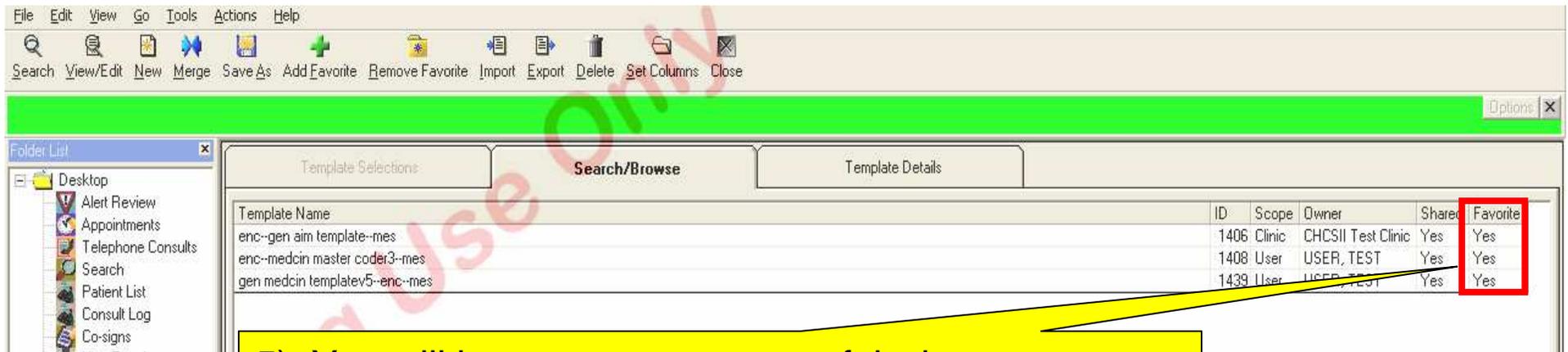
Personal (USER, TEST)

Override the default template owner type

Add to Favorites Shared

Edit Import Cancel

4) Select IMPORT button



5) You will know you are successful when you see this screen with the word **Yes** listed next to each template in the Favorites Column.



6) Your templates will now appear in your encounter drop down menus for your use

Exporting S/O Templates

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Load New SaveAs Edit Delete Search Refresh Import Export

2) Select SEARCH button

SUAREZ, EDUARDO A 20/454-72-3217 45yo M LCDR DOB:10 Sep 1961

Folder List

- Sign Orders
- CHCS-I
- Immunizations Adm
- SUAREZ
- Demo
- Health
- Immunizations
- Vital Signs Rev
- PKC Couplers
- Readiness
- Patient Questic
- Lab
- Radiology
- Clinical Notes
- Previous Encounte
- Flowsheets
- Current Encounter
- Screening
- Vital Signs Entr
- S/O

S/O Template Management

Name Contains: FindNow Folders

Templates

- My Favorites (25)

Template preview

**3) Fill out Search Menu. Can select by name of template, owner type, etc...
If you only want to export S/O templates from your favorite list, you only need to check the box "Select from my favorites only"**

Medicin Template Search

Template Name

Begins With Contains Case Insensitive

Select from my favorites only

Owner Type Clinic

Owners

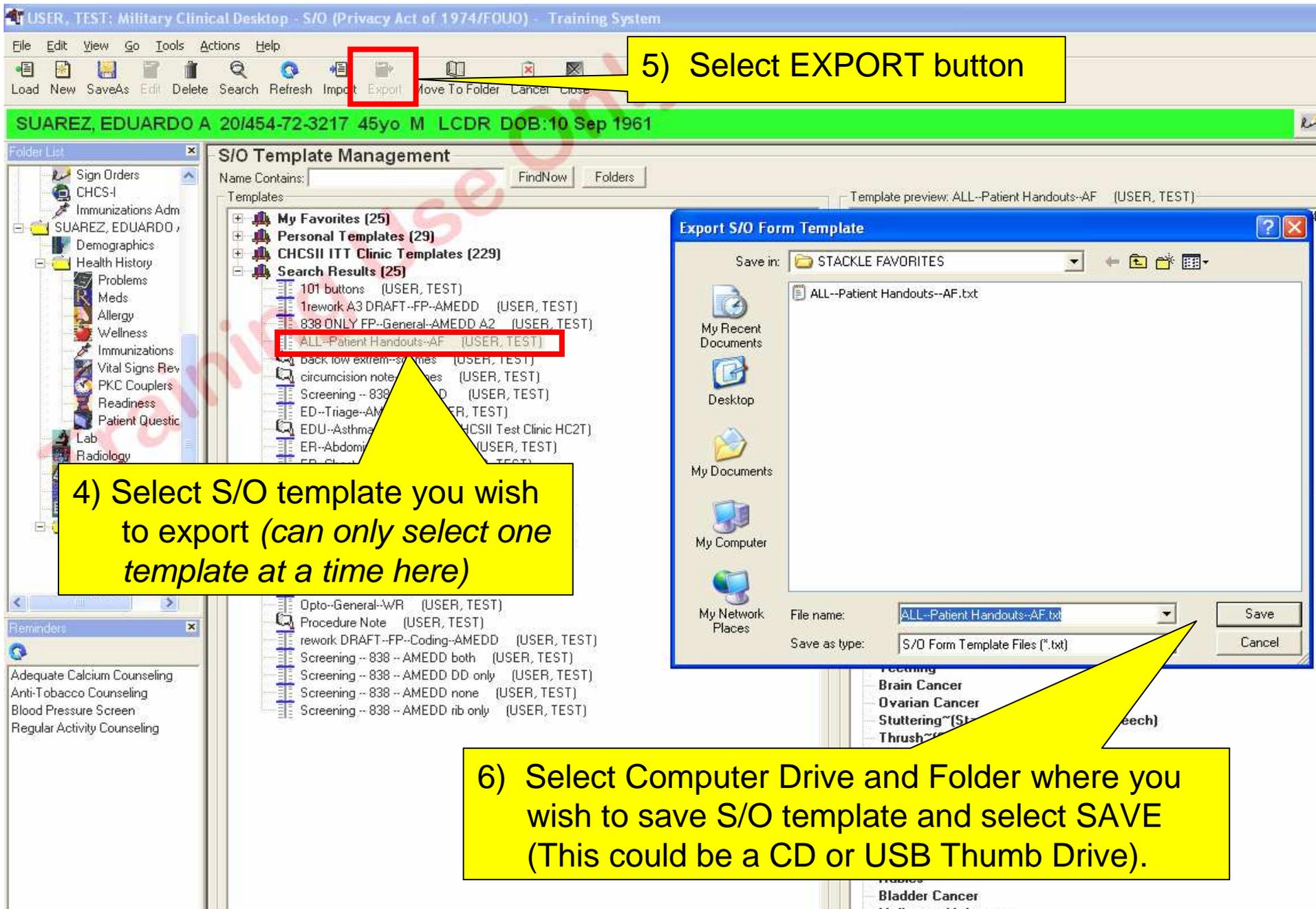
- CHCSII Test Clinic
- GENERAL SURGERY SAME DAYC

Add Remove

Specialty

Replace Search Results Add to Search Results

Clear Search Cancel



Importing S/O Templates

USER, TEST; Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Load New SaveAs Edit Delete Search Refresh Import Export Move To Folder Cancel Close

2) Select IMPORT Button

SUAREZ, EDUARDO A 201454-72-3217 45yo M LCDR DOB:10 Sep 1961

Folder List S/O Template Management

FindNow Folders

Template preview

3) Select computer drive and folder which contain the S/O templates you wish to import

Problems
Meds
Allergy
Wellness
Immunizations
Vital Signs Rev
PKC Couplers
Readiness
Patient Questic
Lab
Radiology
Clinical Notes
Previous Encounte
Flowsheets
Current Encounter
Screening
Vital Signs Entr
S/O

Import M... Template

Available Templates

- ALL--Patient Handouts--AF.txt
- back lower extremity--enc--mes.tpl
- back upper extremity--enc--mes.tpl
- gen AIM templatev5--enc--mes.tpl
- gen medicin templatev5--enc--mes.tpl
- Musculoskeletal AIM--enc--mes.tpl

Selected Templates

C:\
Documents and Settings
Mark.Stackle
My Documents
AHLTA Training Material
CHCS 2 Templates
STACKLE FAVORITES

c:
Override the default template owner type

All Files (*.*)
Template Files (*.LTP)
Text Files (*.TXT)
All Files (*.*)

Favorites Shared

Edit Import Cancel

4) Make sure to change file type to All Files (*.*). Note: S/O templates have the file extension (*.TXT) or (*.LTP) whereas Encounter Templates have the file extension (*.TPL)

Adequate Calcium Counseling
Anti-Tobacco Counseling
Blood Pressure Screen
Regular Activity Counseling

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Load New SaveAs Edit Delete Search Refresh Import Export Move To Folder Cancel Close

SUAREZ, EDUARDO A 20/454-72-3217 45yo M LCDR DOB:10 Sep 1961

Folder List

- Sign Orders
- CHCS-I
- Immunizations Adm
- SUAREZ, EDUARDO ,
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Rev
- PKC Couplers
- Readiness
- Patient Questic
- Lab
- Radiology
- Clinical Notes
- Previous Encounte
- Flowsheets
- Current Encounter
- Screening
- Vital Signs Entr
- S/O

S/O Template Management

Name Contains: FindNow Fold

Templates

- My Favorites (25)
 - 101 buttons (USER, TEST)
 - 1rework A3 DRAFT-FP-AMEDD (USER, TEST)
 - 838 ONLY FP-General-AMEDD A2 (USER, TEST)
 - ALL--Patient Handouts--AF (USER, TEST)
 - back low extrem--so--mes (USER, TEST)
 - circumcision note--so--mes (USER, TEST)
 - Screening -- 838 -- AMEDD (USER, TEST)
 - ED--Triage--AMEDD (USER, TEST)
 - EDU--Asthma Education (CHCSII Test Clinic HC2T)
 - ER--Abdominal Pain--AMEDD (USER, TEST)
 - ER--Chest Pain--AMEDD (USER, TEST)
 - ER--Fast Track Adult--AMEDD (USER, TEST)
 - ER--Nursing--AMEDD (USER, TEST)
 - FP General A3 DRAFT--AMEDD (USER, TEST)
 - FP General A4 DRAFT--AMEDD (USER, TEST)
 - gen medicin--so--mes
 - mdm terms--so--mes
 - NHP-PC-Generic (U
 - Opto--General--WR
 - Procedure Note (US
 - rework DRAFT--FP--Co
 - Screening -- 838 -- AM
 - Screening -- 838 -- AM
 - Screening -- 838 -- AM
 - Screening -- 838 -- AM
- Personal Templates (2)
- CHCSII ITT Clinic Tem

Import Medicin Template

Available Templates

- C:\
- Documents and Settings
- Mark.Stackle
- My Documents
- AHLTA Training Material
- CHCS 2 Templates
- STACKLE FAVORITES

Selected Templates

C:\Documents and Settings\Mark.Stackle\

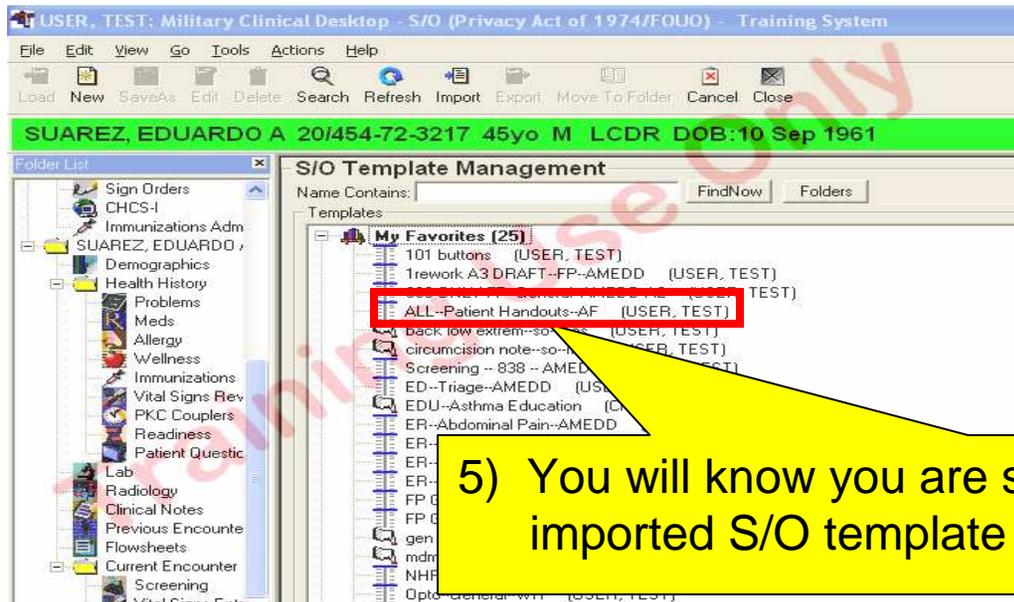
Override the default template owner type
 Personal (USER, TEST)

Add to Favorites
 Shared

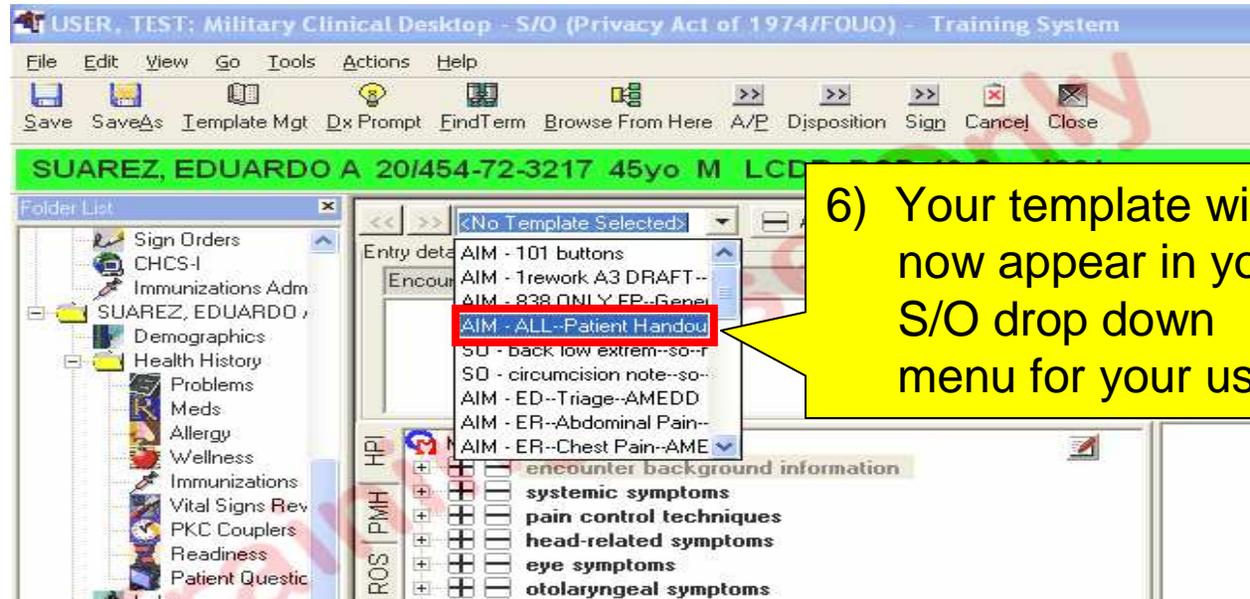
Edit Import Cancel

5) To select templates to import, either:
 a) Select [>>] button which will import all available templates
 b) Hold CTRL button, select each individual template, click [>] button to import only selected available templates

6) Select IMPORT button



5) You will know you are successful when you see your imported S/O template in your My Favorites folder



6) Your template will now appear in your S/O drop down menu for your use



For More Information...



- **AMEDD AHLTA Homepage**
 - <https://www.us.army.mil/suite/page/406> (AKO password required)
- **AHLTA Video Tutorials**
 - <http://www-nmcp.mar.med.navy.mil/AHLTA/AHLTA%20Training%20Tools/index.html>

I would appreciate any feedback or suggestions you have for future ***AHLTA 2 Minute Pearls***. Please contact me at the following:

MAJ Mark Stackle, MD (AHLTA Program Office)

- Email: mark.stackle@us.army.mil

****(If you would like to receive future versions of the AHLTA 2 Minute Pearls directly, please email Laskia Brockenberry at Laskia.Brockenberry@us.army.mil to be added to the distribution list)