



# What's New in AHLTA 3.3 Overview Part 2

# Outline

- **Notifications Module**
  - **Notifications**
  - **Telephone Consults**
  - **New Results**
  - **Tasking, Co-signs, Sign Orders**
- **Module Redesign: New Results**
- **Future Appointments**
- **Co-signing Multiple Encounters/Signing Multiple Tcons**
- **Printing Multiple Encounters**
- **Sensitive Labs**
- **Template Management**
  - **Merge Templates**
  - **Link Templates**
- **Standalone Order Sets**
- **Tasking Module**
- **Creating New Tasks**
- **Web Resources for AHLTA**
- **Tips to Speed-up AHLTA**

# Notifications Module



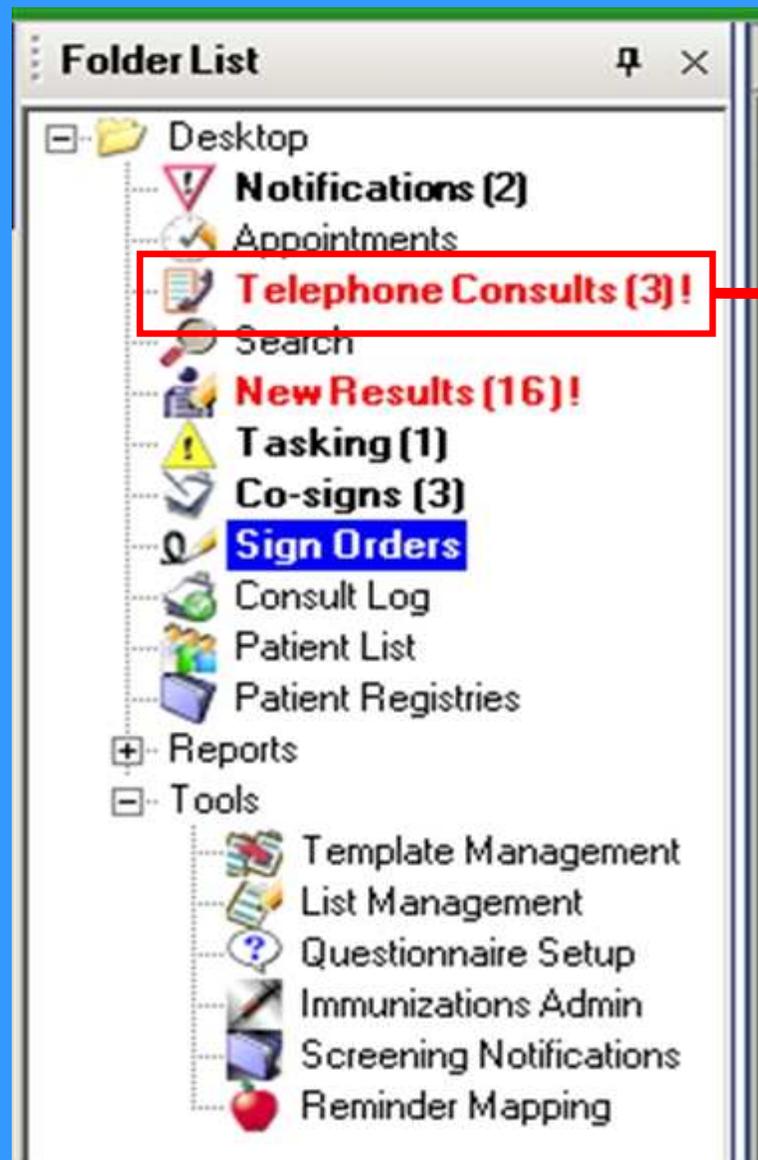
## Desktop Enhancements- Notifications Module: Notifications



**Includes alerts for any encounters that have been modified  
AND  
Includes any PKC couplers (i.e., HART questionnaires) completed by patient**



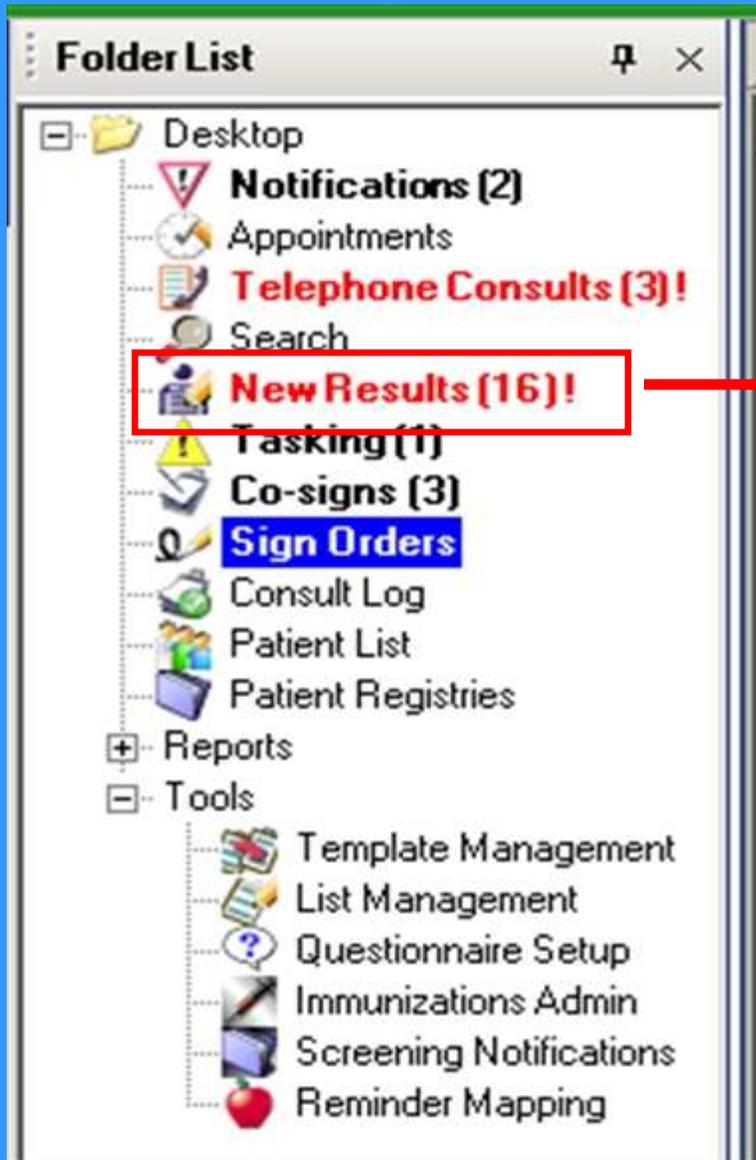
## Desktop Enhancements- Notifications Module: Telephone Consults



These are generated from AHLTA (vs. CHCS). The #3 designates there are 3 pending phone consults and the **red text** along with the “!” means there are higher than normal priority items within these phone consults



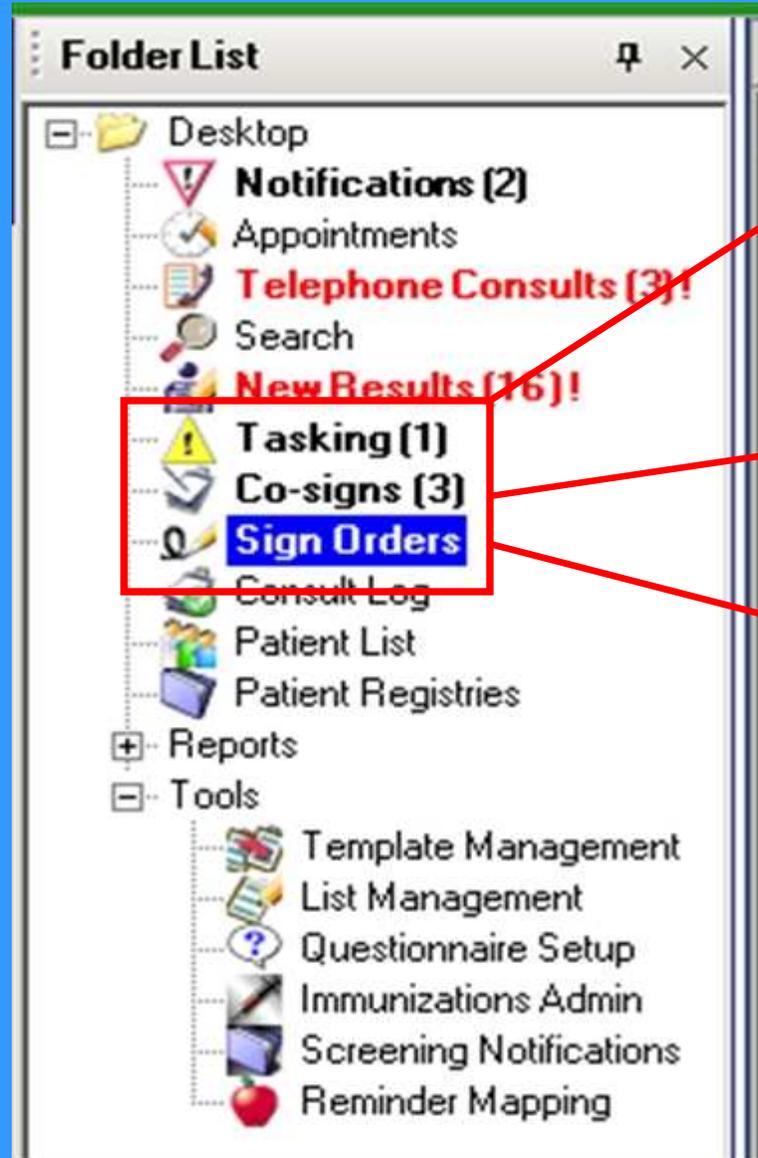
# Desktop Enhancements- Notifications Module: New Results



**Radiology and  
Laboratory results  
generated by CHCS**



## Desktop Enhancements- Notifications Module: Tasking, Co-signs, Sign Orders



**New “Tasking”:** generated  
by AHLTA

**New Encounters to  
“Co-sign”:** generated by  
AHLTA

**New “Sign Orders”:**  
generated by  
CHCS & AHLTA

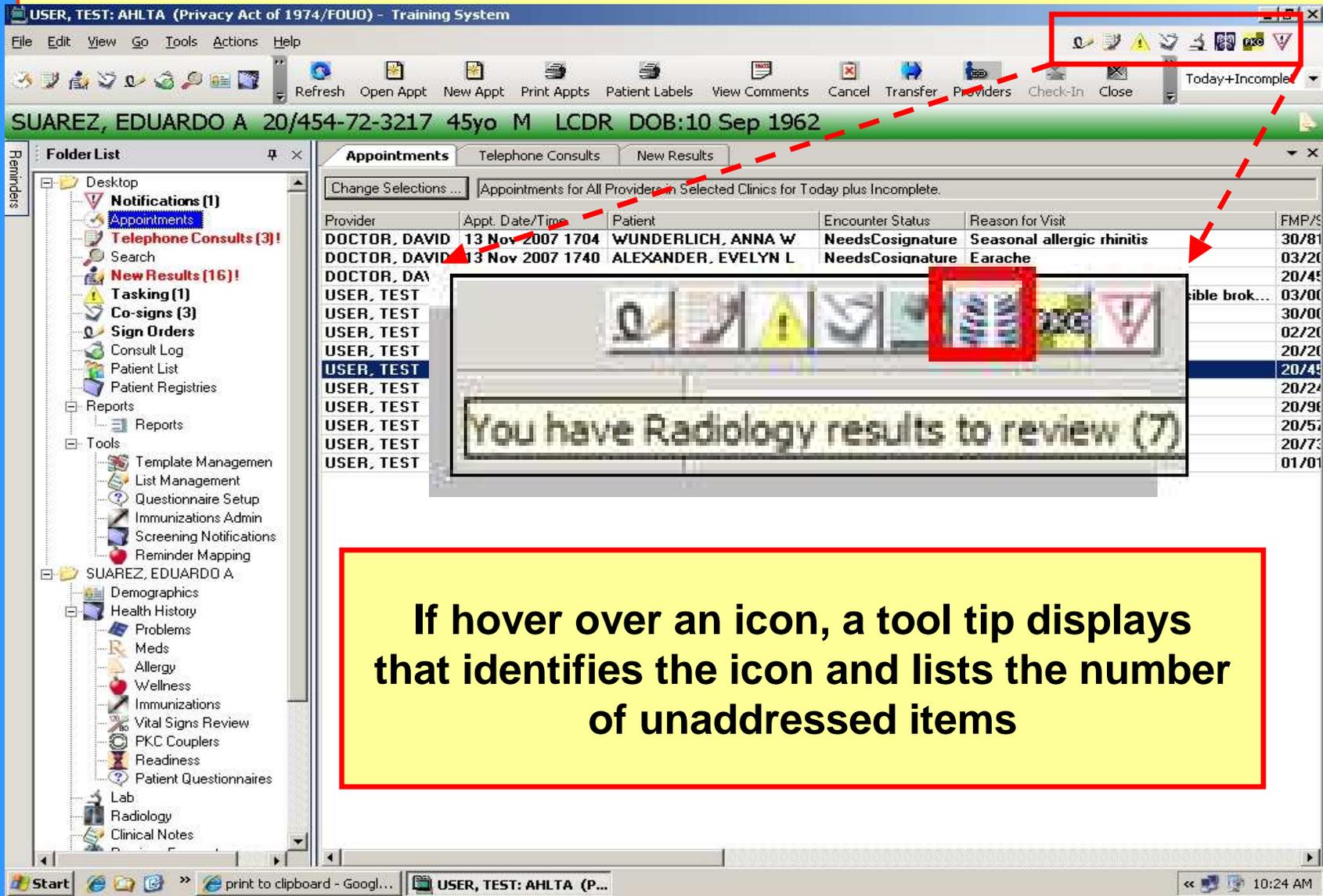


## Desktop Enhancements- Notifications Module: Menu Bar-Notifications Icons

**Moving from left to right:**

- Orders to Sign > Sign Orders module
- Telephone Consults > Telephone Consults module
- Tasking > Tasking module
- Co-signs > Co-signs module
- Lab Results > New Results module
- Rad Results > New Results module
- PKC Couplers > Notifications module
- Notifications > Notifications module

# Desktop Enhancements- Notifications Module: Menu Bar-Notifications Icons



If hover over an icon, a tool tip displays that identifies the icon and lists the number of unaddressed items

# Module Redesign: New Results



# Module Redesign: New Results

Order Comments new for AHLTA 3.3.x

The screenshot displays the 'New Results' module interface. At the top, a navigation bar includes 'Appointments', 'Notifications', 'Telephone Consults', and 'New Results'. A 'Folder List' on the left shows 'New Results (16)!' highlighted. The main area contains a table of results with columns for Patient Name, Status, Type, Test Name, Critical/Abnormal, Date, Order Comments, and Priority. A red box highlights the 'Order Comments' column, which contains text like 'Pt. states last tested about 8 months ago.' and 'Please have pt. return to clinic upon completion.' Below the table, a 'Display Criteria' section has a checkbox for 'Ref Range/Units' which is currently unchecked. A scrollable pane at the bottom shows a detailed view of a 'Chem 17' test result with various lab values.

Patient Name	Status	Type	Test Name	Critical/Abnormal	Date	Order Comments	Priority
ALEXANDER,...	New	Laboratory	Chem 7		29 Nov 2007		Routine
ALEXANDER,...	New	Laboratory	Urinalysis		29 Nov 2007		Routine
BERG, OLAF	New	Laboratory	Chem 7		29 Nov 2007		Routine
SUAREZ, ED...	New	Laboratory	Microalbumin...		29 Nov 2007		Routine
SUAREZ, ED...	New	Laboratory	Chem 17	ABNORMAL	02 Oct 2007		Routine
SUAREZ, ED...	New	Laboratory	Urinalysis	ABNORMAL	13 Nov 2007	Pt. states last tested about 8 months ago.	Routine
SUAREZ, ED...	New	Laboratory	Hemoglobin A1c	ABNORMAL	13 Nov 2007		Routine
SUAREZ, ED...	New	Laboratory	Lipid Panel C...	ABNORMAL	13 Nov 2007		Routine
ALEXANDER,...	New	Radiology	Ultrasound Pe...	ABNORMAL,P...	01 Nov 2007		Routine
ALEXANDER,...	New	Laboratory	CBC W/o Diff	CRITICAL	29 Nov 2007		Routine
ALEXANDER,...	New	Radiology	L-Spine (1 Vie...	Minor Abnorm...	17 Nov 2007		Routine
SUAREZ, ED...	New	Radiology	Sinus Series ...	Minor Abnorm...	17 Nov 2007	Please have pt. return to clinic upon completion.	Routine
SUAREZ, ED...	New	Radiology	Right Shoulde...	Minor Abnorm...	01 Nov 2007		Routine
SUAREZ, ED...	New	Radiology	Chest PA And...	NORMAL	17 Oct 2007		Routine
ALEXANDER,...	New	Radiology	Right Ankle (...)	Normal	17 Nov 2007		Routine
BERG, OLAF	New	Radiology	Right Ankle (...)	Normal	17 Nov 2007		Routine

Test / Result Name	Site/Specimen	Collection Date / Result Values
Chem 17	Site/Specimen	02 Oct 2007
Albumin	Serum	4.4
Alk Phos	Serum	88
Anion Gap	Serum	19
AST	Serum	28
Bilirubin	Serum	1.1
Calcium	Serum	10.1
Chloride	Serum	98
CO2	Serum	28
Creatinine, Serum/Plasma	Serum	1.1
GGT	Serum	80
Glucose	Serum	210 (H)
LCH	Serum	600
Phosphate	Serum	4.6
Potassium	Serum	4.7
Sodium	Serum	145
Total Protein	Serum	7.2

New preview pane added to allow quick review of Lab/Rad results

WORKFLOW: by default, "Ref Range/Units" box is NOT checked in New Results- consider checking it.

# Module Redesign: New Results – Keyboard Shortcut

**Must click into this grid with mouse in order to begin use of keyboard**

Patient Name	Status	Type	Test Name	Critical/Abnormal	Date	Order
SUAREZ, EDUARDO	Reviewed	Laboratory	Lipid Panel Comp...	ABNORMAL	18 Nov 2007	
ALEXANDER, VIOLET	Reviewed	Radiology	Ultrasound Pelvis...	ABNORMAL_PH...	06 Nov 2007	
ALEXANDER, VIOLET	Reviewed	Radiology	L-Spine (1 View) ...	Minor Abnormality	22 Nov 2007	
SUAREZ, EDUARDO	New	Radiology	Right Shoulde...	Minor Abnorm...	06 Nov 2007	
ALEXANDER, VIOLET	New	Radiology	Right Ankle [...	Normal	22 Nov 2007	
SUAREZ, EDUARDO	New	Radiology	Chest PA And...	NORMAL	22 Oct 2007	

Display Criteria:  Ref Range/Units     Vertical     Horizontal    Date and Times shown below are "Collected Date and Times"    Legend...

Test / Result Name	Site/Specimen	Collection Date / Result Values
<b>Lipid Panel Complete</b>	<b>Site/Specimen</b>	<b>18 N</b>
Cholesterol	Serum	198
HDL	Serum	42
LDL	Serum	123
Risk Factor	Serum	4.7
Triglycerides	Serum	165
VLDL	Serum	33

**WORKFLOW: pressing the 'spacebar' on the keyboard provides a rapid way of reviewing new results**

**Next Slide**

# Module Redesign: New Results – Keyboard Shortcut

With each click of spacebar, status changes to “Ready to Remove” and the focus moves to the next new result

Entire result not displayed in preview screen which results in a gap on scroll bar- see Next Slide for what spacebar does here

Next Slide

Patient Name	Status	Type	Test
SUAREZ, EDUARDO	Ready To Remove	Laboratory	Lipid
ALEXANDER, VIOLET	Ready To Remove	Radiology	Ultra
ALEXANDER, VIOLET	Ready To Remove	Radiology	L-Sp
SUAREZ, EDUARDO	Ready To Remove	Radiology	Righ
ALEXANDER, VIOLET	New	Radiology	Righ
SUAREZ, EDUARDO	New	Radiology	Che

# Module Redesign: New Results – Keyboard Shortcut

The next tap of the spacebar (see previous slide) pages down the preview screen. Once at the bottom, next tap will then move to next result in the list

Patient Name	Status	Type	Test Name	Critical/Abnormal	Date
SUAREZ, EDUARDO	Ready To Remove	Laboratory	Lipid Panel Comp...	ABNORMAL	18 Nov 2007
ALEXANDER, VIOLET	Ready To Remove	Radiology	Ultrasound Pelvis...	ABNORMAL_PHONE...	06 Nov 2007
ALEXANDER, VIOLET	Ready To Remove	Radiology	L-Spine (1 View) ...	Minor Abnormality	22 Nov 2007
SUAREZ, EDUARDO	Ready To Remove	Radiology	Right Shoulder (A...	Minor Abnormality	06 Nov 2007
ALEXANDER, VIOLET	New	Radiology	Right Ankle (...)	Normal	22 Nov 2007
SUAREZ, EDUARDO	New	Radiology	Chest PA And...	NORMAL	22 Oct 2007

# Module Redesign: New Results

## Saving New Results

Refresh Mark Reviewed Save Sign/Remove Forward Close

<No Patient Selected>

Folder List

- Desktop
- Notifications (2)
- Appointments
- Telephone Consults (3) !
- Search
- New Results (16) !**
- Tasking (1)
- Co-signs (3)
- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Reports
- Tools
  - Template Management
  - List Management
  - Questionnaire Setup
  - Immunizations Admin
  - Screening Notifications
  - Reminder Mapping

Appointments Co-signs **New Results**

New Saved

Provider Search

Patient Name	Status				
SUAREZ, EDUARDO	New				
SUAREZ, EDUARDO	New				
ALEXANDER, VIOLET	New				
ALEXANDER, VIOLET	New	Laboratory	CBC W/o Diff	CRITICAL	06 Dec 2007
ALEXANDER, VIOLET	New	Radiology	L-Spine (1 Vie...	Minor Abnorm...	24 Nov 2007
SUAREZ, EDUARDO	New	Radiology	Sinus Series ...	Minor Abnorm...	24 Nov 2007
SUAREZ, EDUARDO	New	Radiology	Right Shoulde...	Minor Abnorm...	08 Nov 2007
SUAREZ, EDUARDO	New	Radiology	Chest PA And...	NORMAL	24 Oct 2007
ALEXANDER, VIOLET	Ready To Remove	Radiology	Right Ankle (Trau...	Normal	24 Nov 2007
BERG, OLAF	New		Right Ankle (...)	Normal	24 Nov 2007

Mark Reviewed  
**Save**  
 Sign/Remove  
 Undo Remove  
 Forward  
 New

Ankle (Trauma  
 5905864  
 Status: C

Procedure: Right Ankle (Trauma) Series Report  
 Event Date: 24-Nov-2007 00:00:00

**“Left-Click” to select results to save, then “Right-Click” to bring up choices- in this case “Save” is chosen**

# Module Redesign: New Results

## Saving New Results

<No Patient Selected>

Folder List

- Desktop
- Notifications (2)
- Appointments
- Telephone Consults (3) !
- Search
- New Results (16) !**
- Testing (1)
- Co-signs (3)
- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Reports
- Tools
- Template Management
- List Management
- Questionnaire Setup
- Immunizations Admin
- Screening Notifications
- Reminder Mapping

Appointments Co-signs **New Results**

New Saved

Provider Search

Patient Name	Status	Type	Test Name	Critical/Abnormal	Date
▶ BERG, OLAF	Reviewed	Radiology	Right Ankle (Trau...	Normal	24 Nov 2007

**Now the selected exam is saved for later viewing**

```

***** Right Ankle (Trauma) Series Report *****
POC Enc: #E5905864   POC Fac: CHCS II ITT
Status: Complete

Procedure:                Right Ankle (Trauma) Series Report
Event Date:                24-Nov-2007 00:00:00

Procedure:                ANKLE, TRAUMA RT
Reason for Order:         Twisted ankle--R/O fx.
Exam #:                   02001206
Transcription Date/Time:  Nov 24 2007  8:12AM
Provider:                 User, Test
Result Code:              Normal
Interpreted By:          FRECHETTE, GEORGE
Approved By:              FRECHETTE, GEORGE
Approved Date/Time:      Nov 24 2007  8:12AM
Report Text:
  A-P, Mortise, and Lateral views show no fracture or other abnormality.
  IMPRESSION: No fracture or abnormality seen of the right ankle.
  
```

# Co-signing Multiple Encounters/ Signing Multiple TCons



# Co-sign Multiple Encounters

Sign Encounter Close

SUAREZ, EDUARDO A 20/454-72-3217 45yo M LCDR DOB:10 Sep 1962

Folder List

Desktop

Notifications (2)

Appointments

Telephone Consults (3)

Search

New Results (16)!

Tasking (1)

**Co-signs (3)**

Sign Orders

Consult Log

Patient List

Patient Registries

Reports

Tools

SUAREZ, EDUARDO A

Demographics

Health History

Problems

Meds

Allergy

Wellness

Immunizations

Appointment: **Co-signs**

Encounters Requiring Cosignature by: USER, TEST Providers

Date	Patient	FMP/SSN	Primary Diagnosis	Clinic	Provider	Enc #
07 Dec 2007 1740	SUAREZ, EDUARDO A	20/454723217	HYPERLIPIDEMIA	CHCSII Test Clinic	DOCTOR, DAVID	
07 Dec 2007 1740	ALEXANDER, EVELYN L	03/202455743	OTITIS MEDIA RIGHT EAR	CHCSII Test Clinic	DOCTOR, DAVID	
07 Dec 2007 1704	WUNDERLICH, ANNA W	30/818118118	ALLERGIC RHINITIS	CHCSII Test Clinic	DOCTOR, DAVID	

Signed Encounter Documents 07 Dec 2007 1740 by DOCTOR, DAVID (1 documents found)

- Append Narrative
- Amend Encounter
- Sign Encounter**
- Select All
- Restore Column Order Defaults

**“Left-Click”, hold down and select patients to co-sign**

**Then, “Right-Click” to reveal “Sign Encounter”**

**Next Slide**

# Co-sign Multiple Encounters

**Co-Sign Encounter 1 of 3**

Patient: WUNDERLICH, ANNA W	Date: 05 Dec 2007 1704 EST	Appt Type: WI
Treatment Facility: CHCSII IIT Facility	Clinic: CHCSII Test Clinic	Provider: DOCTOR, DAVID
Patient Status: Outpatient		Co-signer: USER, TE ST

**Reason for Appointment:**  
Screening Written by DOCTOR, DAVID @ 05 Dec 2007 1716 EST  
Appointment Reason For Visit: Seasonal allergic rhinitis  
Allergen information verified by DOCTOR, DAVID @ 05 Dec 2007

**Selected Reason(s) For Visit:**  
ALLERGIC RHINITIS (Follow-Up) Comments:

**Vitals**  
Vitals Written by DOCTOR, DAVID @ 05 Dec 2007  
BP: 120/75, HR: 72, RR: 12, T: 98.7 F, WT: 125 lbs

**SO Note** Written by DOCTOR, DAVID @ 05 Dec 2007 1716 EST

**Chief complaint**  
The Chief Complaint is: Allergic rhinitis. SAR well controlled for the past 3 yrs. with zyrtec. This season she is having multiple symptoms.

**History of present illness**  
The Patient is a 25 year old female who reported itching of eyes.  
She reported a watery nasal discharge and sneezing. She reported a sore throat in the morning.  
She denied wheezing.

**Past medical/surgical history**

**Reported History:**  
Environmental exposure: No contact with pets or other animals.

**Diagnosis History:**  
Allergic rhinitis

Enter Your Password:   Auto-Print  Sensitive

Cosigner Required

Final workload will be set to: (Workload can be changed in Disposition prior to signing encounter)

**Presented with 3 choices. Clicking on "Sign" or "Skip" will bring you to the next encounter**

# Signing Multiple TCons

File Edit View Go Tools Actions Help

Refresh New Telcon Open Cancel Transfer Notes Edit Phone # Reason Sign Encounters Patient Labels Options Close All Outstanding

WUNDERLICH, ANNA W 30/818-11-8118 25yo F FM: 2LT DOB:05 Dec 1982

Folder List

Appointments Telephone Consults

Change Selections... Telcons for All Providers in All My Clinics for Any Date (All Outstanding).

Telcon Date/Time	Status	Patient	CallBack Phone	Reason for Call	Urgency	Clinic	MEPRS Code	Pro
17 Dec 2007 0000	Inprogress	ALEXANDER, EVELYN L	(123) 333-3333	Earache and fever	Medium	CHCSII Test Clinic	HC2T	U9
17 Dec 2007 0000	Inprogress	SUAREZ, EDUARDO A	(123) 888-8888	chest pain	High	CHCSII Test Clinic	HC2T	U9
17	0000	Inprogress	WUNDERLICH, ANNA W		Low	CHCSII Test Clinic	HC2T	U9

1

2

1. Select patients with keyboard or mouse  
2. "Right-Click" and select "Sign Encounter"

Sign Encounter

Next Slide

# Signing Multiple TCons

**Sign Encounter 1 of 3**

Patient: <b>ALEXANDER, EVELYN L</b>	Date: <b>17 Dec 2007 0000 EST</b>	Appt Type: <b>TCON</b>
Treatment Facility: <b>CHCSII IIT Facility</b>	Clinic: <b>CHCSII Test Clinic</b>	Provider: <b>USER, TEST</b>
Patient Status: <b>Outpatient</b>		Call Back Phone: <b>(123) 333-3333</b>

**Reason for Telephone Consult:** Earache and fever  
**Appointment Comments:**  
 Telcon Appointment

**SO Note** Written by USER, TEST @ 18 Dec 2007 0858 EST  
**Subjective**  
 Discussed issue with patient.

**A/P** Last Updated by USER, TEST @ 18 Dec 2007 0858 EST  
**I. DIABETES MELLITUS**

**Disposition** Last Updated by USER, TEST @ 18 Dec 2007 0858 EST  
**Follow up:** with PCM.  
**Discussed:** Diagnosis, Medication(s)/Treatment(s), Alternatives, Potential Side Effects with Patient who indicated understanding.

**Same choices as with Co-Signs**

Enter Your Password:   Auto-Print Taxonomy **Physicians/Allopathic/Osteopat**  Sensitive

Cosigner Required

Final workload will be set to: Count [Workload can be changed in Disposition prior to signing encounter]

# Signing Multiple TCons

**Sign Encounter 3 of 3**

Patient: <b>WUNDERLICH, ANNA W</b>	Date: <b>17 Dec 2007 0000 EST</b>	Appt Type: <b>TCON</b>
Treatment Facility: <b>CHCSII ITT Facility</b>	Clinic: <b>CHCSII Test Clinic</b>	Provider: <b>USER, TEST</b>
Patient Status: <b>Outpatient</b>		Call Back Phone: <b>(123) 456-7890</b>

**Reason for Telephone Consult:** Med refill  
**Appointment Comments:**  
Telcon Appointment

**SO Note** Written by USER, TEST @ 18 Dec 2007 0900 EST  
**Subjective**  
All issues discussed with patient.

**Disposition** Last Updated by USER, TEST @ 18 Dec 2007 0902 EST  
**Follow up:** as needed.  
**Discussed:** Diagnosis, Medication(s)/Treatment(s), Alternatives, Potential Side Effects with Patient who indicated understanding.

If Tcon NOT ready to sign, an explanation is provided and user presented with ability to fix it

This encounter has the following incomplete items:  
- A/P Section: Incomplete data

Fix Now  
Skip  
Cancel

# Future Appointments



# Future Appointments

**Change Selections...**

**Within the Appointments Module, select "Change Selections"**

Provider	Appt. Date/Time	SN	CheckIn Time
USER, TEST	08 Dec 2007 00	00000210	08 Dec 200
USER, TEST	08 Dec 2007 00	00000200	08 Dec 200
USER, TEST	08 Dec 2007 0900	027202455743	
USER, TEST	08 Dec 2007 0900	02/454723217	
USER, TEST	08 Dec 2007 0900	30/967628867	

**Appointment Search Selections**

**Clinics**

- This Clinic
- All My Clinics
- Selected Clinic(s)

- AMBULATORY PROCEDURE UNIT (APCU--AMBULATORY PROCEDURE UNIT)
- CHCS II ITT DENTAL (CAA--DENTAL CARE)
- CHCS II ITT SRTSII (HC2T--CHCSII-T)
- CHCSII Test Clinic (HC2T--CHCSII-T)
- Emergency Clinic (BIAQ--URGENT CARE UNIT SB)
- GENERAL SURGERY SAME DAYC (HC2T--CHCSII-T)
- IBWA CLINIC 0052 (EKAA--AMBULATORY CARE ADMIN TAMC)
- IBWA CLINIC 0120 (AAL--PULMONARY/UPPER RESPIRATORY DISEASE)
- IBWA CLINIC 0121 (AGB--FAMILY PRACTICE SURGERY)
- IBWA CLINIC 0124 (EHA--LAUNDRY SERVICE)

**Providers**

- Me
- All for this Clinic(s)
- Selected Providers

- Unassigned
- DOCTOR, DAVID
- NURSE, KAREN
- USER, TEST

**Dates**

- Today Only complete
- Today Plus All Incomplete Back [ 1 ] Days Only
- Today And Back [ 1 ] Days
- One Date [ 08 Dec 2007 ]
- Date Range [ 08 Dec 2007 ] [ 0000 ] Thru [ 29 May 2008 ] [ 2359 ]

**Next Slide**

# Future Appointments

Appointments Co-signs

Change Selections Appointments for All Providers in All My Clinics for 08 Dec 2007 0000 thru 29 May 2008 2359 Any Status.

Provider	Appt. Date/Time	Patient	Encounter Status	Reason for Visit
USER, TEST	08 Dec 2007 0005	SMITH, JOSHUA D		Fell off playground equip/possible broken arm
USER, TEST	08 Dec 2007 0010	JACKSON, SONYA B		Asthma Attack
USER, TEST	08 Dec 2007 0900	ALEXANDE		
USER, TEST	08 Dec 2007 0900	SUAREZ, M		
USER, TEST	08 Dec 2007 0900	WILLIAMS,		
USER, TEST	08 Dec 2007 0915	FLANAGAN,		les ordered
USER, TEST	08 Dec 2007 0930	ALEXANDE		N followup
USER, TEST	08 Dec 2007 0945	CLOUD, LA		xam
USER, TEST	08 Dec 2007 1000	SUAREZ, E		followup
USER, TEST	08 Dec 2007 1030	BERG, OLAF V		Cold and Flu
USER, TEST	08 Dec 2007 1030	SUAREZ, MIGUEL E		Dental Procedure (mouth/tongue sores)
USER, TEST	08 Dec 2007 1100	WILLIAMS, CLAYTON U	Checked in on CHCS I	heada
USER, TEST	08 Dec 2007 1115	ALEXANDER, EDWARD P		Denta
USER, TEST	08 Dec 2007 1130	SUGARMAN, REGINOLD T		worse
USER, TEST	08 Dec 2007 1200	CHANG, JON S		vasec
.Unassigned	08 Dec 2007 1300	MARCOS, FREDERICK B		Fever
USER, TEST	13 Dec 2007 0730	CLOUD, HEATHER		colpos
USER, TEST	13 Dec 2007 0940	CHANG, JON S		skin g
USER, TEST	13 Dec 2007 1040	WUNDERLICH, HERMAN P		ingrov
USER, TEST	13 Dec 2007 1140	BERG, OLAF V		sigmo
USER, TEST	13 Dec 2007 1600	MARCOS, RAMONA D		

Now future appointments are shown

“Left-Click” to select patient, then “Right-Click” to bring up choices- in this case “Open” is chosen

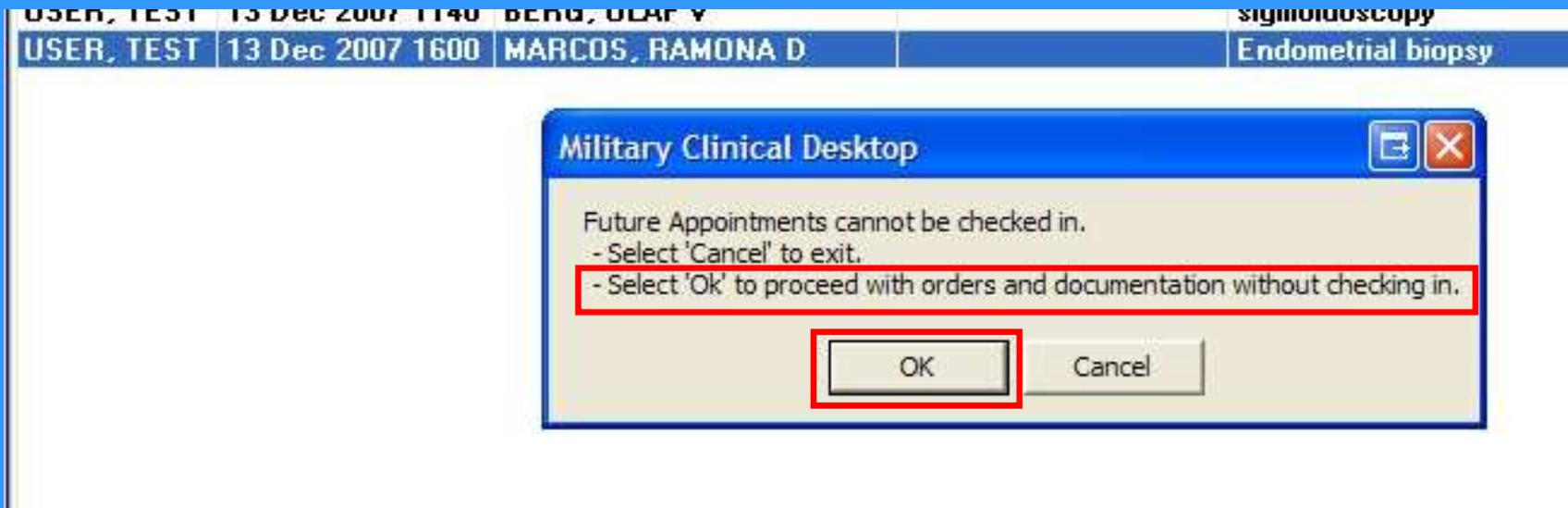
Open

- New Appointment
- Check Out
- Cancel Appointment
- Transfer
- Additional Providers
- Print Appointment List
- Patient Labels
- View Comments
- Undo Cancel
- Select All
- Sign Encounter

Next Slide

# Future Appointments

This screen will pop-up- proceed by clicking "OK" to allow orders & documentation on this future appointment



Next Slide

# Future Appointments

013-97-9876 55yo F MG DOB:20 Jun 1952

Appointments **Current Encounter**

Date: 13 Dec 2007 1600 EST  
Primary Provider: USER, TEST  
Patient Status: Outpatient APV  
Reason for Appointment: Endometrial biopsy

Status: **Open Not Checked-In**

Treatment Facility: CHCSII ITT Facility  
Clinic: AMBULATORY PROCEDURE UNIT

AutoCite... AutoCites 07 0832 EST

Problem  
• Chronic  
• Sinus t  
• Essent

Allergies  
• PEANUT OIL (PEANUT OIL): Rash

Screening  
Vitals  
S/O  
Drawing  
A/P  
**Disposition**  
AddNote

A/P Last Updated by USER, T

Workflow: since other modules (S/O, Drawing, A/P, AddNote) are available- future labs, pictures/diagrams, etc. can be pre-placed to electronically prepare for next appointment

Status is "Open Not Checked-In"

"Disposition" and "Sign" disabled

WORKFLOW: since other modules (S/O, Drawing, A/P, AddNote) are available- future labs, pictures/diagrams, etc. can be pre-placed to electronically prepare for next appointment

# Printing Multiple Encounters



# Printing Multiple Encounters

**1. Click & hold the “Ctrl” key on keyboard, then “Left-Click” with mouse to select encounters**

**2. Select “File”, then “Print” then “SF600”**

Provider	Appt. Date/Time	Patient	Status	Procedure
USER, TEST	08 Dec 2007 0005	SMITH, JOSHUA D		
USER, TEST	08 Dec 2007 0010	JACKSON, SONYA B		
USER, TEST	08 Dec 2007 0900	ALEXANDER, MARIE D		
USER, TEST	08 Dec 2007 0900	SUAREZ, MARIA E	CheckedIn	Prophy
USER, TEST	08 Dec 2007 0900	WILLIAMS, BERNICE K		Pick up glasses
USER, TEST	08 Dec 2007 0915	FLANAGAN, PAULA Z		Needs flight goggles ordered
USER, TEST	08 Dec 2007 0930	ALEXANDER, VIOLET W		cough & fever HTN followup
USER, TEST	08 Dec 2007 0945	CLOUD, LANCE	CheckedIn	Comprehensive Exam
USER, TEST	08 Dec 2007 1000	SUAREZ, EDUARDO A		diabetes/diabetes followup
USER, TEST	08 Dec 2007 1030	BERG, OLAF V		Flu and Flu
USER, TEST	08 Dec 2007 1030	SUAREZ, MIGUEL E		Dental Procedure (mouth/tongue sores)
USER, TEST	08 Dec 2007 1100	WILLIAMS, CLAYTON U	CheckedIn	headache/physical
USER, TEST	08 Dec 2007 1115	ALEXANDER, EDWARD P		Dental Emergency
USER, TEST	08 Dec 2007 1130	SUGARMAN, REGINOLD T		worsening eczema
USER, TEST	08 Dec 2007 1200	CHANG, JON S		vasectomy status
.Unassigned	08 Dec 2007 1300	MARCOS, FREDERICK B		Fever
USER, TEST	13 Dec 2007 0730	CLOUD, HEATHER		colposcopy
USER, TEST	13 Dec 2007 0940	CHANG, JON S		skin graft
USER, TEST	13 Dec 2007 1040	WUNDERLICH, HERMAN P		ingrown toenail
USER, TEST	13 Dec 2007 1140	BERG, OLAF V		sigmoidoscopy
USER, TEST	13 Dec 2007 1600	MARCOS, RAMONA D	OpenNotCheckedIn	Endometrial biopsy

**Next Slide**

# Printing Multiple Encounters

HEALTH RECORD	CHRONOLOGICAL RECORD OF MEDICAL CARE	
Patient: SUAREZ, MARIA E Treatment Facility: CHCSB III Facility Patient Status: Outpatient	Date: 08 Dec 2007 0948 EST Clinic: CHCS B III USN FAL	Appr Type: WELL Provider: USN, TEST
Reason for Appointment: Prophy		
<div style="border: 2px solid red; padding: 10px; width: fit-content; margin: 0 auto;"> <p><b>Now all selected encounters are sent to the default printer</b></p> </div>		
Patient: CLOUD, LANCE Treatment Facility: CHCSB III Facility Patient Status: Outpatient	Date: 08 Dec 2007 0948 EST Clinic: CHCS B III USN FAL	Appr Type: WELL Provider: USN, TEST
Reason for Appointment: Comprehensive Exam		
<div style="border: 2px solid red; padding: 10px; width: fit-content; margin: 0 auto;"> <p><b>Now all selected encounters are sent to the default printer</b></p> </div>		
<b>Name/SSN: SUAREZ, MARIA E/626784433</b> Ssn: F FAP SSN: 021454713217 DOB: 08 Sep 1999 PCN: N41 USN FAMI NBR AD MC Status Standard: No	Tel R: 121-666-6666 Tel W: CS: Status:	Sponsor SSN: SUAREZ, EDUARDO A/656722217 Rank: LIEUTENANT COMMANDER O-4-N Use: Outpt Res. Rsn: PCN: USN, TEST Tel: PCN:
<small>CHRONOLOGICAL RECORD OF MEDICAL CARE            THIS INFORMATION IS PROTECTED BY THE PRIVACY ACT OF 1976 (PL-93-502). UNAUTHORIZED ACCESS            TO THIS INFORMATION IS A VIOLATION OF FEDERAL LAW. VIOLATORS WILL BE PROSECUTED.</small>		
<small>STANDARD FORM 888 (REV. 7)            Prescribed by GSA and OMB            FORMER (11 CFR) 101-11.605            Page 1 of 1</small>		
<b>Name/SSN: CLOUD, LANCE/77338112</b> Ssn: M FAP SSN: 0216452110058 DOB: 26 Mar 1999 PCN: F61 USN FAMI NBR AD MC Status Standard: No	Tel R: 121-666-6666 Tel W: CS: Status:	Sponsor SSN: CLOUD, WEATHER/662110058 Rank: CAPTAIN O-4-A Use: Outpt Res. Rsn: PCN: USN, TEST Tel: PCN:
<small>CHRONOLOGICAL RECORD OF MEDICAL CARE            THIS INFORMATION IS PROTECTED BY THE PRIVACY ACT OF 1976 (PL-93-502). UNAUTHORIZED ACCESS            TO THIS INFORMATION IS A VIOLATION OF FEDERAL LAW. VIOLATORS WILL BE PROSECUTED.</small>		
<small>STANDARD FORM 888 (REV. 7)            Prescribed by GSA and OMB            FORMER (11 CFR) 101-11.605            Page 1 of 1</small>		

# Sensitive Labs



# Display of Sensitive Labs: Module: *Lab*

**\*NOTE: "BTG"=break-the-glass**

User selects sensitive lab AND had ordered it OR has BTG\* authority

Origin	Type	Date Collected	Date Ordered	Date Resulted	Report	Ordering Provider
DoD	Standard Lab	01 Nov 2006 1525	01 Nov 2006 1421	01 Nov 2006 1426	HIV 1 Ab	LEFLEUR, PETER
DoD	Standard Lab	31 Oct 2006 1516	27 Oct 2006 1542	31 Oct 2006 1419	LBC W/Auto Diff	ANDERSON, THOMAS
DoD	Standard Lab	28 Feb 2006 1552	28 Feb 2006 1549	28 Feb 2006 1553	Hemoglobin	FBTESTER, A

Display pane reveals sensitive lab result

Test / Result Name	Site/Specimen	Collection Date / Result Values	Units	Ref Rng
HIV 1 Ab	Site/Specimen	01 Nov 2006 1525	Units	Ref Rng
HIV-1 Ab	SERUM	NEGATIVE <i>		

User is NOT the ordering provider OR does not have BTG\* privileges

Only the lab results are hidden in AHLTA 3.3.x

Test / Result Name	Site/Specimen	Collection Date / Result Values	Units	Ref Rng
HIV 1 Ab	Site/Specimen	01 Nov 2006 1525	Units	Ref Rng
HIV-1 Ab	SERUM	*****		

## Display of Sensitive Labs:

### *Health History Panel*

Scenario: user is ordering provider OR  
user consents to audit

The screenshot displays a software interface titled "Health History". The interface is divided into several sections: "Problems", "Allergies", "Previous Encounters (Last Four)", "Lab Results", "Radiology Results", and "Couplers".

The "Lab Results" section contains a table with the following data:

Date Collected	Report	Result
31 Oct 2006 1416	CBC with diff	WBC => 27.0 => (H) RBC => 31.00
01 Nov 2006 1425	HIV 1 Ab	HIV-1 Ab => NEGATIVE =>

The "Radiology Results" section contains a table with the following data:

Date	Procedure	Result Code
31 Oct 2006 1411	Bilateral Ankle Stress (Only) Series Report	NORMAL
11 Oct 2006 1422	Left Ankle Series Report	NORMAL

The "Couplers" section contains a table with the following data:

Coupler Name	When Administered
HART 1.0 Full	10/26/2006 12:24:40 PM

A yellow callout box with a red border and the text "Sensitive results displayed" has a red arrow pointing to the HIV 1 Ab result in the Lab Results table.

**Display of Sensitive Labs:**  
***Encounter Summary AutoCites***  
**Scenario: any user**

S/O

Lab AutoCites Refreshed by MMTAME DD, B @ 30 Mar 2006 0809 EST

Labs

Test Name	Site Specimen	Result	Units	Ref Range
27 Mar 2006 1647				
HIV 1 p24 Antigen	Site Specimen	Result		
HIV P24	SERUM	*****		

**Results ALWAYS masked**

# TEMPLATE MANAGEMENT



# Template Management Overview

## Appointments

Folder List

- Desktop
- Notifications (3)
- Appointments
- Telephone Consults (3)
- Search
- New Results (14)!
- Tasking (1)
- Co-signs (3)
- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Tools
- Template Management

Provider	Appt. Date/Time	Patient
USER, TEST	04 Dec 2007 0005	SMITH, JOSHUA O
USER, TEST	04 Dec 2007 0010	JACKSON, SONYA B
USER, TEST	04 Dec 2007 0900	ALEXANDER, MARIE D
USER, TEST	04 Dec 2007 0930	ALEXANDER, VIOLET W
USER, TEST	04 Dec 2007 1000	SUAREZ, EDUARDO A
USER, TEST	04 Dec 2007 1030	BERG, OLAF V
USER, TEST	04 Dec 2007 1100	WILLIAMS, CLAYTON U
USER, TEST	04 Dec 2007 1130	SUGARMAN, REGINOLD T
USER, TEST	04 Dec 2007 1200	CHANG, JON S
.Unassigned	04 Dec 2007 1300	MARCOS, FREDERICK B

## Current Encounter

Folder List

- New Results (14)!
- Tasking (1)
- Co-signs (3)
- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Tools
- Template Management
- List Management
- Questionnaire Setup

Date: 04 Dec 2007 0900 EST Status: In Progre  
 Primary Provider: USER, TEST Type: ACUT\$  
 Patient Status: Outpatient  
 Reason for Appointment: Ankle Sprain  
 Appointment Comments: late adolescence

AutoCites Refreshed by USER, TEST @ 04 Dec 2007 155

Problems  
 Chronic:  
 \* Normal routine history and physical adolescent (12 - 18)

All roads lead to the same place.  
 No matter where you select "Template Management, it will now go to the same module

## A/P

Folder List

- Patient List
- Patient Registries
- Reports
- Tools
- Template Management
- List Management

Priority	ICD	Diagnosis
----------	-----	-----------

## S/O

Folder List

- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Tools
- Template Management
- List Management

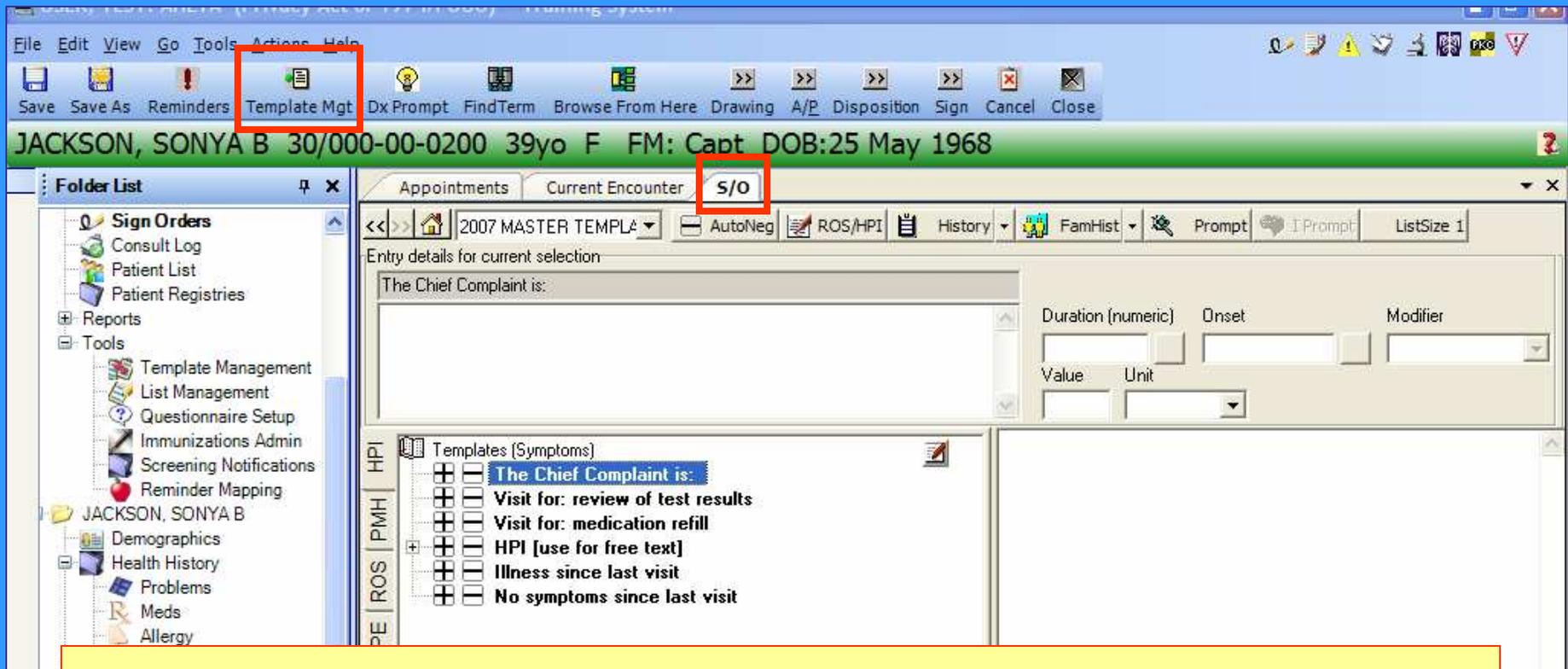
2007 MASTER TEMPLA  
 AutoNeg

Entry details for current selection

The Chief Complaint is:

# Template Management

**In the S/O Note the Template Management Icon is still available**



Template Management Modules will be merged into 1 (*see what displays after clicking on the Template Management Icon...*)

**Next Slide**

## Template Management in the S/O Module

Back to same module accessed from  
the Folder List

Folder List

Appointments Current Encounter S/O **Template Management**

Name Contains: **Search here** Find Now Expanded Search Folders

My Favorites  
My Standalone Order Sets  
AMBULATORY PROCEDURE UNIT  
CHCS II ITT DENTAL  
CHCS II ITT SRTSII  
CHCSII Test Clinic  
Emergency Clinic  
GENERAL SURGERY SAME DAYC  
Training Facility (CHCSII ITT Facility)  
Enterprise Folders

Actions Help

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

15-63-8943 55yo M Ret:VADM DOB:10 Feb 1952

S/O Template Management

Name Contains: Find Now Folders

Templates

- My Favorites (233)
- Personal Templates (23)
- CHCSII ITT Clinic Templates (0)

Before it would take you to a separate module

AHLTA 838

# Template Management Overview

The screenshot displays the 'Template Management' window. On the left, the 'Folder List' shows various categories like 'Notifications', 'Appointments', 'Telephone Consults', 'Search', 'New Results', 'Tasking', 'Co-signs', 'Sign Orders', 'Consult Log', 'Patient List', 'Patient Registries', 'Reports', and 'Tools'. The 'Tools' folder is expanded, showing 'Template Management' as the active tool. The main area shows a search bar with 'Name Contains:' and options for 'Begins With', 'Contains', and 'Case Insensitive'. Below the search bar is a tree view of templates. The 'URI Encounter (USER, TEST)' template is selected and highlighted. To the right, the 'Template Preview' pane shows a list of linked templates: 'History of present illness', 'Review of systems', 'History', 'Physical findings', 'Tests', 'Diagnoses', 'Procedures', 'Orders', 'Other Therapies', and 'Images'.

No separation of  
**“Encounter Templates”**  
 from  
**“S/O Templates”**

All  
 templates  
 will be  
 together

# Template Management Overview

**Folder List**

- Desktop
- Notifications (2)
- Appointments
- Telephone Consults (3) !
- Search
- New Results (16) !
- Tasking (1)
- Co-signs (3)
- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Tools
  - Template Management
  - List Management
  - Questionnaire Setup

**Appointments** **Template Management**

Name Contains:  Find Now Expanded Search Folders

Begins With  Contains  Case Insensitive

**My Favorites (3)**

- #CTM PE--Starter Template (USER, TEST)
- URI Encounter (USER, TEST)
- URI orders (USER, TEST)

**My Standalone Order Sets**

**AMBULATORY PROCEDURE UNIT**

**CHCS II ITT DENTAL**

**CHCS II ITT SRTSII**

**CHCSII Test Clinic (12)**

- STARTER KIT TEMPLATES
- Abd Pain\_starter kit (CHCSII Test Clinic HC2T)
- Abnormal Vaginal Bleeding\_starter kit (CHCSII Test Clinic HC2T)

**Template Preview: URI Encounter (USER, TEST)**

**Linked Templates**

- History of present illness
  - The Chief Complaint Is: Uri Symptoms
  - Fever [as Symptom]
  - Chills [as A Symptom]
  - Earache
  - Nasal Discharge
  - Sore Throat
  - Cough
  - Coughing Up Sputum
  - Muscle Aches, Generalized (myalgias)
- Review of systems
- History
- Physical findings
- Tests
- Diagnoses
- Procedures
- Orders
- Other Therapies
- Images

**Clicking on the Plus Sign + will reveal a detailed list**

Diabetes--aCPG--Trng (CHCSII Test Clinic HC2T)

Diabetes\_starter kit (CHCSII Test Clinic HC2T)

HTN\_starter kit (CHCSII Test Clinic HC2T)

**Emergency Clinic**

# Template Management Overview

The screenshot displays the 'Template Management' window. On the left is a 'Folder List' pane with categories like 'Appointments', 'Telephone Consults (3)!', 'Search', 'New Results (14)!', 'Tasking (1)', 'Co-signs (3)', 'Sign Orders', 'Consult Log', 'Patient List', 'Patient Registries', 'Reports', and 'Tools'. The main area shows a search for 'URI Template (USER, TEST)' with search options: 'Name Contains', 'Begins With', 'Contains', and 'Case Insensitive'. A list of templates is shown, with 'URI Template (USER, TEST)' highlighted. A right-click context menu is open over this template, with 'Default Encounter: Template' selected. Other menu items include 'New', 'Save As...', 'Edit', 'Delete', 'Add Favorite', 'Remove Favorite', 'Add to Standalone Order Sets', 'Remove From Standalone Order Sets', 'Mark As Shared', 'Remove From Shared', 'Import', 'Export', 'Copy To Folder', and 'Move To Folder'. A 'Template Preview' pane on the right shows 'URI Template (USER, TEST)' with a list of linked templates: 'History of present illness', 'Review of systems', 'History', and 'Physical findings'. A mouse cursor is positioned over the 'Default Encounter: Template' option.

*Right-Click*  
on a template  
to Set a  
**Default**  
**Template**

**Next Slide**

# Template Management Overview

The screenshot displays the 'Template Management' window. On the left is a 'Folder List' pane with various categories like 'Appointments', 'Search', 'Tasking', and 'Tools'. The 'Tools' section has 'Template Management' selected. The main area shows a search filter 'Name Contains:' and search options: 'Begins With', 'Contains', and 'Case Insensitive'. A list of templates is shown under 'My Favorites (6)'. One template, 'URI Template (DEFAULT TEMPLATE) (USER, TEST)', is highlighted with a red box and a red arrow pointing to a callout box. The callout box contains the text: 'Confirms that the default was set'. To the right, a 'Template Preview' section shows a list of linked templates: 'History of present illness', 'Review of systems', 'History', 'Physical findings', 'Tests', 'Diagnoses', 'Procedures', and 'Orders'.

Folder List

- Appointments
- Telephone Consults (3) !
- Search
- New Results (14) !
- Tasking (1)
- Co-signs (3)
- Sign Orders
- Consult Log
- Patient List
- Patient Registries
- Reports
- Tools
  - Template Management
  - List Management
  - Questionnaire Setup
  - Immunizations Admin
  - Screening Notifications
  - Reminder Mapping
- ALEXANDER, MARIE D
  - Demographics
  - Health History
  - Problems
  - Meds
  - Allergy
  - Wellness
  - Immunizations

Template Management

Name Contains:

Begins With  Contains  Case Insensitive

Find Now Expanded Search Folders

My Favorites (6)

- #CTM PE--Starter Template (USER, TEST)
- 2007 MASTER TEMPLATE (USER, TEST)
- PC-Respiratory Symptoms--AF (USER, TEST)
- URI Encounter (USER, TEST)
- URI Orders (USER, TEST)
- URI Template (DEFAULT TEMPLATE) (USER, TEST)**

My Standalone Order Sets

- AMBULATORY PROCEDURE UNIT
- CHCS II ITT DENTAL
- CHCS II ITT SRTSII
- CHCSII Test Clinic
- Emergency Clinic
- GENERAL SURGERY SAME DAYC
- Training Facility (CHCSII ITT Facility)
- Enterprise Folders

Template Preview: URI Template (USER, TEST)

- Linked Templates
- History of present illness
- Review of systems
- History
- Physical findings
- Tests
- Diagnoses
- Procedures
- Orders

Confirms that the default was set

# How to Load Templates

3 different ways to load a template into the Current Encounter

Click on the template name and then click "Load"

OR

*Double-Click* template name

OR

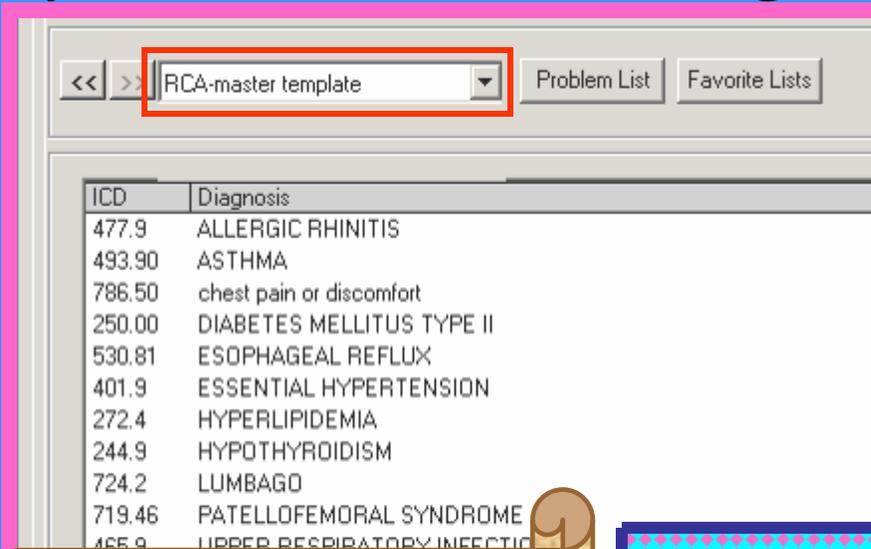
*Right-Click* on template name and click "Load"

The screenshot shows the 'Template Management' window in a medical software application. The window has a menu bar with 'Load', 'New', 'Save As', 'Delete', 'Refresh', 'Import', 'Export', 'Remove Favorite', 'Move To Folder', and 'Copy To Folder'. Below the menu bar, there are tabs for 'Appointments', 'Current Encounter', and 'Template Management'. The 'Template Management' tab is active, showing a search field 'Name Contains:' and radio buttons for 'Begins With', 'Contains', and 'Case Insensitive'. A list of templates is displayed under 'My Favorites (6)'. The template 'PC-Respiratory Symptoms-AF (USER, TEST)' is selected and highlighted. A context menu is open over this template, showing options: 'Load', 'New', 'Save As', and 'Delete'. A mouse cursor is positioned over the 'Load' option. The background shows a sidebar with various medical tools and reports, including 'Sign Orders', 'Consult Log', 'Patient List', 'Patient Registries', 'Reports', 'Tools', 'Template Management', 'List Management', 'Questionnaire Setup', 'Immunizations Admin', 'Screening Notifications', 'Reminder Mapping', 'ALEXANDER, VIOLET W', 'Demographics', 'Health History', 'Problems', and 'Meds'.

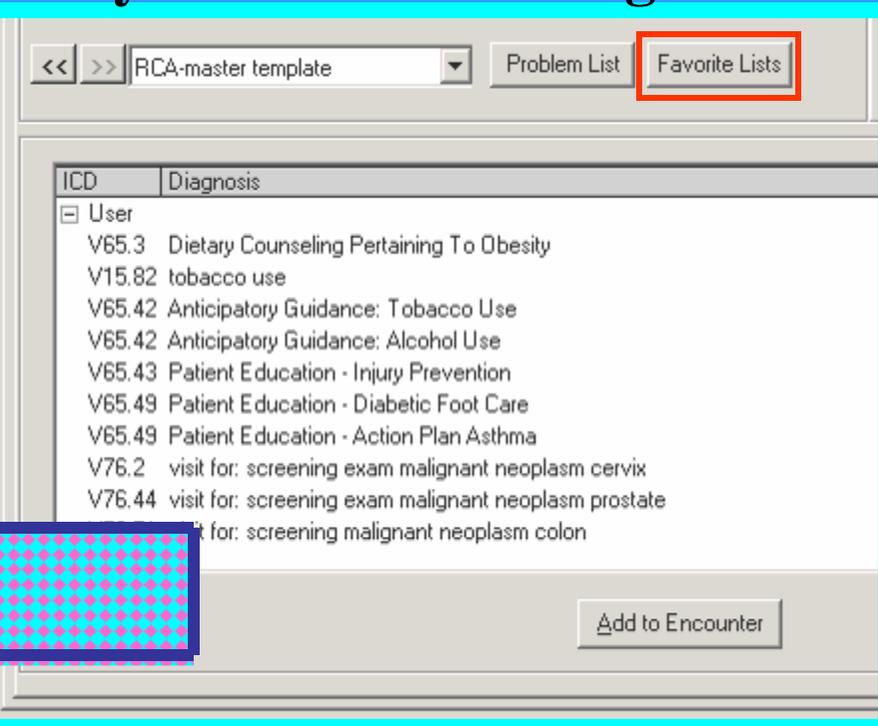
# Merging of Default Encounter Diagnosis with Favorite List

## My Default Encounter's Diagnosis

## My Favorite List Diagnosis



ICD	Diagnosis
477.9	ALLERGIC RHINITIS
493.90	ASTHMA
786.50	chest pain or discomfort
250.00	DIABETES MELLITUS TYPE II
530.81	ESOPHAGEAL REFLUX
401.9	ESSENTIAL HYPERTENSION
272.4	HYPERLIPIDEMIA
244.9	HYPOTHYROIDISM
724.2	LUMBAGO
719.46	PATELLOFEMORAL SYNDROME
465.9	UPPER RESPIRATORY INFECTION

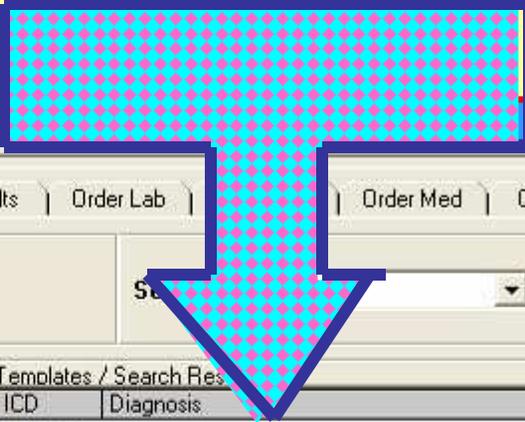


ICD	Diagnosis
User	
V65.3	Dietary Counseling Pertaining To Obesity
V15.82	tobacco use
V65.42	Anticipatory Guidance: Tobacco Use
V65.42	Anticipatory Guidance: Alcohol Use
V65.43	Patient Education - Injury Prevention
V65.49	Patient Education - Diabetic Foot Care
V65.49	Patient Education - Action Plan Asthma
V76.2	visit for: screening exam malignant neoplasm cervix
V76.44	visit for: screening exam malignant neoplasm prostate
	visit for: screening malignant neoplasm colon

**WORKFLOW:**  
Consider cleaning up these lists in advance of merge, otherwise lists may be long after merge

Next Slide

# Merging of Default Encounter Diagnosis with Favorite List



Diagnosis | Order Sets | Procedure | Reminders | Order Consults | Order Lab | Order Med | Other Therapies

STER TEMPLATE <Default> Favorites

Patient Problem List / DxPromot Selections

ICD	Diagnosis
477.9	ALLERGIC RHINITIS
V65.42	Anticipatory Guidance: Alcohol Use
V65.42	Anticipatory Guidance: Tobacco Use
493.90	ASTHMA
786.50	CHEST PAIN
V65.3	Dietary Counseling Pertaining To Obesity
530.81	ESOPHAGEAL REFLUX
401.9	ESSENTIAL HYPERTENSION
272.4	HYPERLIPIDEMIA
244.9	HYPOTHYROIDISM
724.2	LUMBAGO

Templates / Search Results

ICD	Diagnosis
477.9	ALLERGIC RHINITIS
V65.42	Anticipatory Guidance: Alcohol Use
V65.42	Anticipatory Guidance: Tobacco Use
493.90	ASTHMA
786.50	CHEST PAIN
V65.3	Dietary Counseling Pertaining To Obesity
530.81	ESOPHAGEAL REFLUX
401.9	ESSENTIAL HYPERTENSION
272.4	HYPERLIPIDEMIA
244.9	HYPOTHYROIDISM
724.2	LUMBAGO

Add to Encounter

Merged  
Diagnosis  
with Favorites

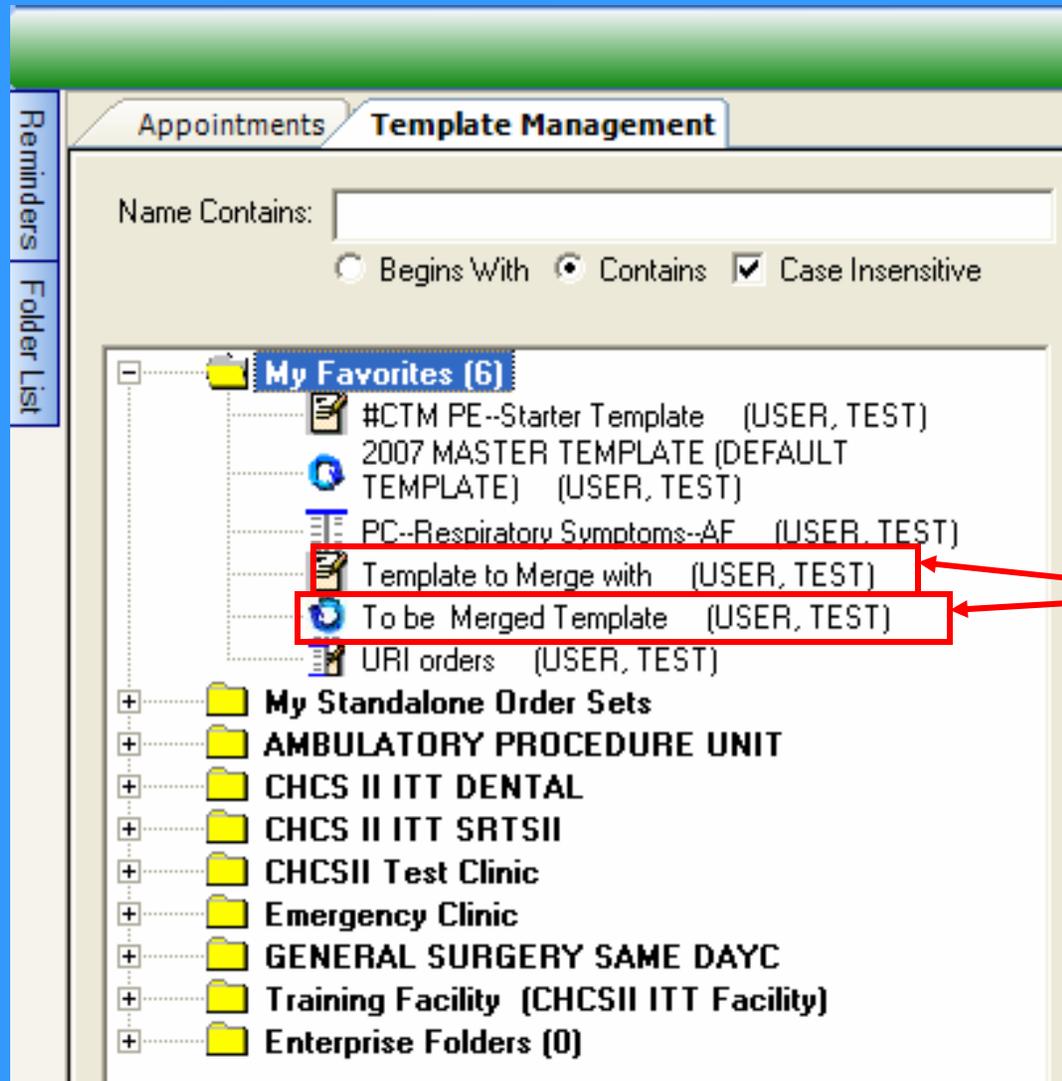
**NOTE:**  
Procedures are  
also merged into  
the default  
template

Templates / Search Results

ICD	Diagnosis
244.9	HYPOTHYROIDISM
724.2	LUMBAGO
278.00	OBESITY
V65.49	Patient Education - Action Plan Asthma
V65.49	Patient Education - Diabetic Foot Care
V65.43	Patient Education - Injury Prevention
V15.82	tobacco use
V76.2	visit for: screening exam for malignant neoplasm cervix
V76.44	visit for: screening exam malignant neoplasm prostate
V76.51	visit for: screening malignant neoplasm colon

☐ Clinic

# How to Merge Templates



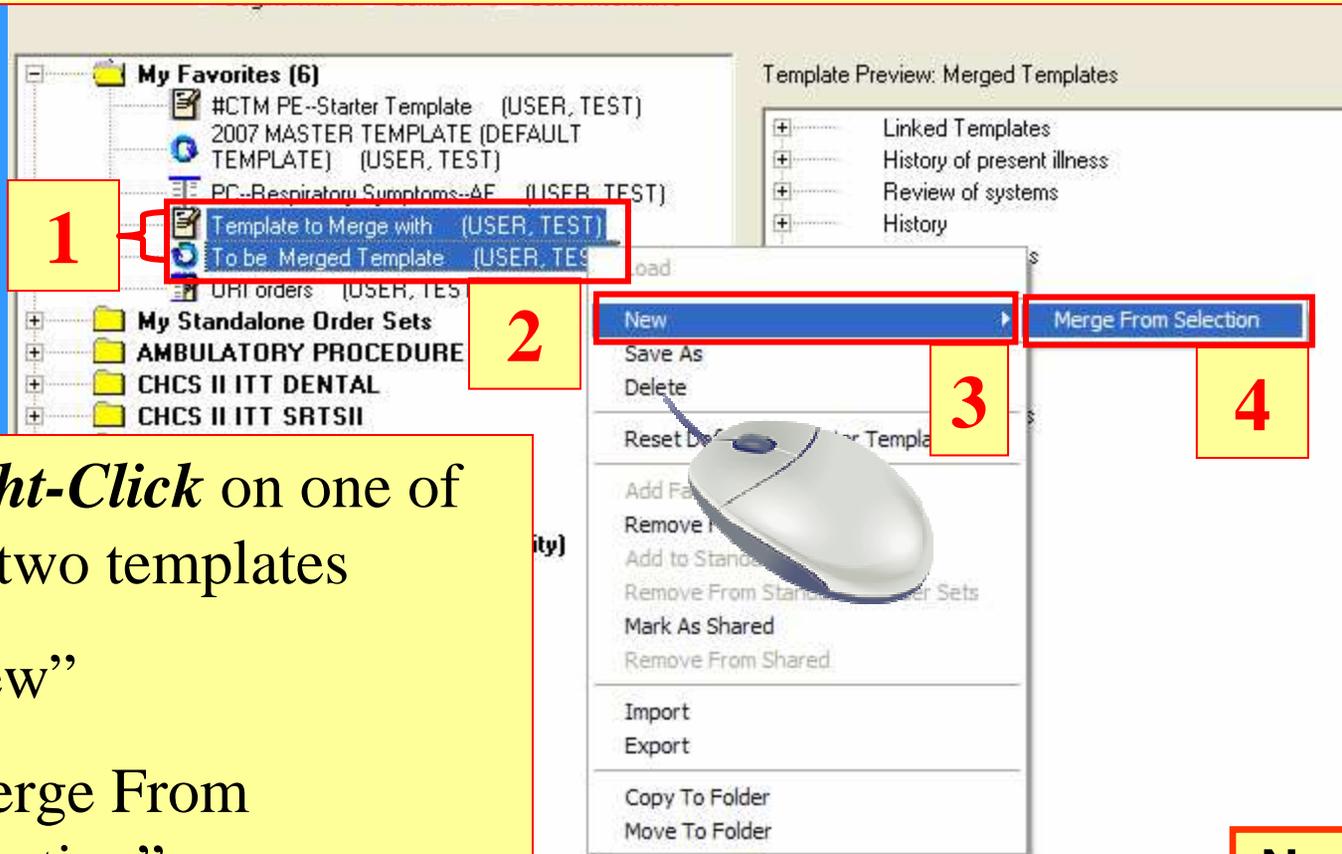
Let's  
merge  
these  
together



Next Slide

## How to Merge Templates

1. Use <Shift> to highlight both desired templates to merge  
(use <Ctrl> if you need to select templates that are not next to each other)



2. *Right-Click* on one of the two templates
3. “New”
4. “Merge From Selection”

Next Slide



## How to Merge Templates

When returning to the Template Module Screen, you will see the merged templates under the name you gave it when saving

The image shows two overlapping screenshots from a medical software interface. The left screenshot is a 'Save Encounter Template' dialog box. It has a 'Save in:' field set to 'Personal' and a 'Folder:' field set to 'Personal List'. A list of template names is shown, including '2007 MASTER TEMPLATE', 'my standalone throat template', 'Template to Merge with', 'To be Merged Template', 'URI orders', 'PC--Respiratory Symptoms--AF', and '#CTM PE--Starter Template'. The 'Template Name:' field at the bottom is filled with 'TEMPLATES MERGED'. A red box highlights this field and the 'Save' button next to it. The right screenshot is the 'Template Management' screen. It shows a tree view of template folders. Under the 'My Favorites [7]' folder, a list of templates is displayed. The entry 'TEMPLATES MERGED (USER, TEST)' is highlighted with a red box. An arrow points from the 'Save' button in the left screenshot to this entry in the right screenshot.

Save Encounter Template

Save in: Personal

Folder: Personal List

Template Name

- 2007 MASTER TEMPLATE
- my standalone throat template
- Template to Merge with
- To be Merged Template
- URI orders
- PC--Respiratory Symptoms--AF
- #CTM PE--Starter Template

Template Name: TEMPLATES MERGED

Specialty:

Add to Favorites  Shared

Save

Cancel

Template Management

My Favorites [7]

- #CTM PE--Starter Template (USER, TEST)
- 2007 MASTER TEMPLATE (DEFAULT TEMPLATE) (USER, TEST)
- PC--Respiratory Symptoms--AF (USER, TEST)
- Template to Merge with (USER, TEST)
- TEMPLATES MERGED (USER, TEST)**
- To be Merged Template (USER, TEST)
- URI orders (USER, TEST)

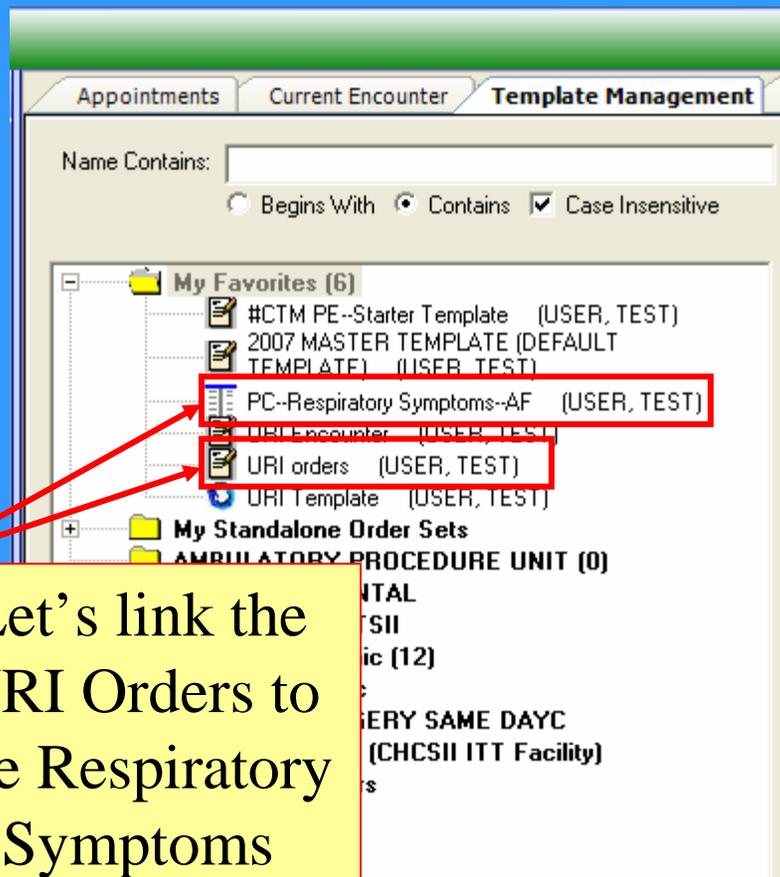
My Standalone Order Sets

- AMBULATORY PROCEDURE UNIT
- CHCS II ITT DENTAL
- CHCS II ITT SRTSII
- CHCSII Test Clinic
- Emergency Clinic
- GENERAL SURGERY SAME DAYC
- Training Facility (CHCSII ITT Facility)
- Enterprise Folders

# Linking Templates

**A merged template never updates:**

When you link a form or template to a personal template, when loaded you will always see the most recent version of the linked item

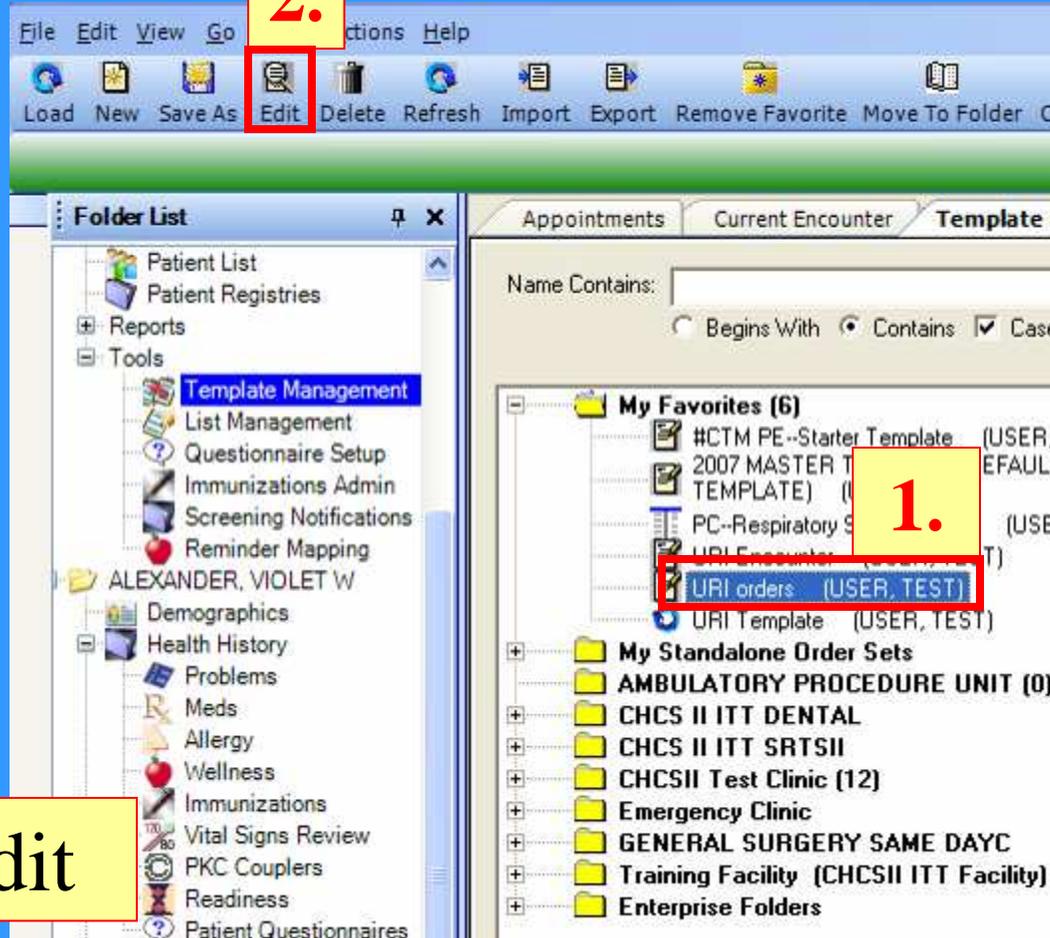


Let's link the  
URI Orders to  
the Respiratory  
Symptoms  
form



# Linking Templates

2.



2. Edit

1. Highlight the template that you will link the form to

1.

Next Slide

# Linking Templates

6. Save Save As Drawing Cancel Close

6.

3. Templates

4.

5.

3. Templates

4. Highlight template to link

5. Click "Link"

6. Click "Save"

Can see that it was linked

# Standalone Order Sets



# Standalone Order Sets

## How to Create Standalone Order Sets

1

1. Click "New"
2. Then select "A/P"

The screenshot shows the 'Template Management' window. The 'New' button in the menu bar is highlighted with a red box. Below it, the 'A/P' option in the 'Browse' dropdown is also highlighted with a red box. The main area displays a list of templates under the 'Medicin (Symptoms)' category, with 'encounter background information' selected. A scroll bar is visible on the right side of the list.

**WORKFLOW:** This will take it out of the Favorites List, so you do not have to Scroll through it in the S/O Module

2

Next Slide

## Standalone Order Sets

Add all the Orders desired here:

Hint: You can customize the order just as if you were  
in an encounter

Diagnosis | Procedure | Order Consults | Order Lab | Order Rad | Order Med | Other Therapies

MOTRIN Search

Item Name:  
IBUPROFEN (MOTRIN) 800MG (U/D)--PO 800MG

SIG: T1 tab po tid

Qty: 20 Max Days Supply Default Unit: Default  
Refills: 0 Maximum

Child-Resistant Cap

Comments: (Optional)

A/P

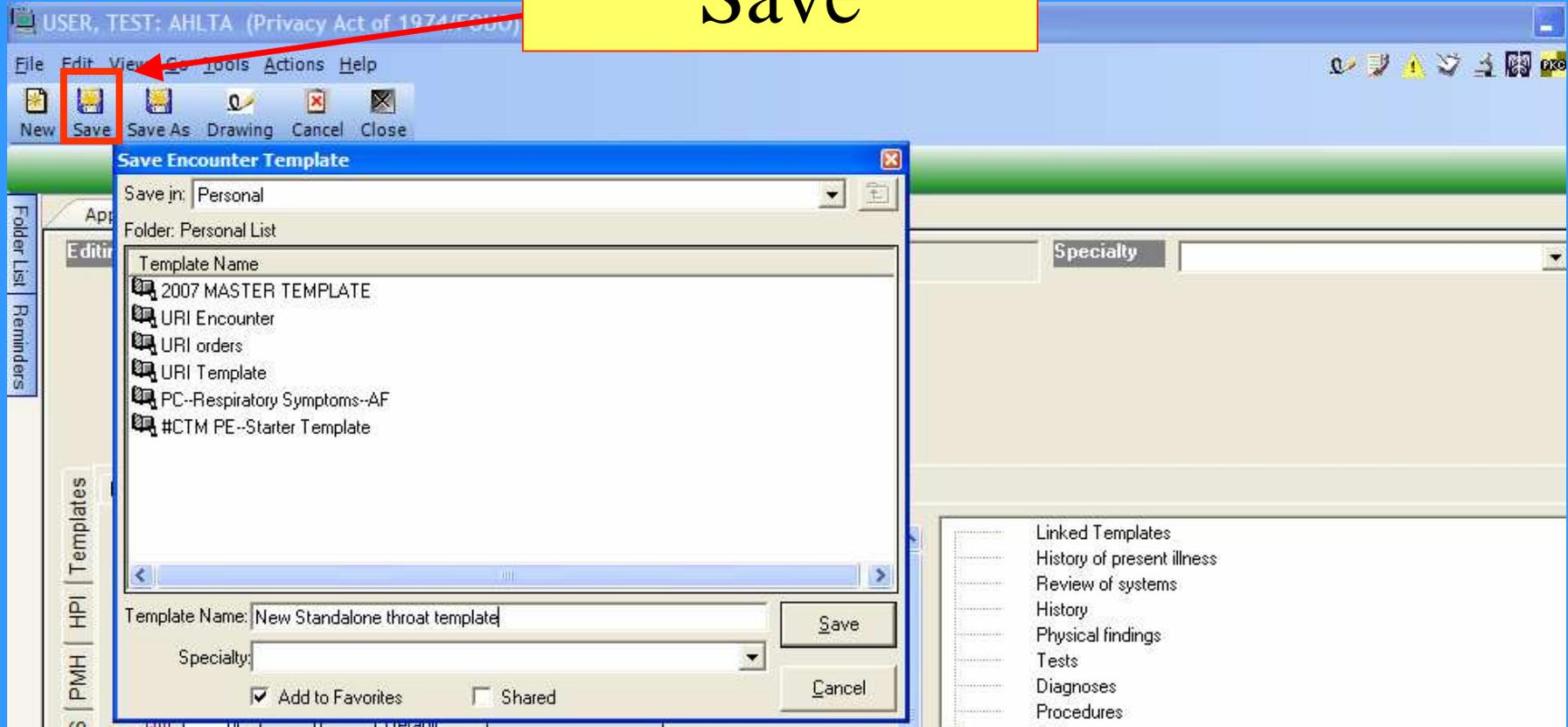
Clear Add

- Linked Templates
- History of present illness
- Review of systems
- History
- Physical findings
- Tests
- Diagnoses
- Procedures
- Orders
  - (lab) Cbc W/o Diff
  - (lab) Throat Culture
- Other Therapies
- Images

Next Slide

# Standalone Order Sets

Save



After saving, go back to the Template Management Module to find the saved template in the "My Favorites" folder

Next Slide

# Standalone Order Sets

The screenshot displays the 'Template Management' window. The 'Name Contains' search bar is empty, and the search options are set to 'Contains' and 'Case Insensitive'. The left pane shows a tree view of templates, with 'my standalone throat template (USER, TEST)' selected. A red box labeled '1' highlights this selection. A right-click context menu is open over the selected template, with a mouse cursor hovering over it. A red box labeled '2' highlights the 'Add to Standalone Order Sets' option in the menu. The right pane shows a 'Template Preview' for 'my standalone throat template' with a list of linked templates including 'History of present illness' and 'Review of systems'.

1. *Right-Click* on template

2. Select “Add to Standalone Order Sets”

Next Slide

# Standalone Order Sets

**WARNING:**  
**“Delete” will**  
**delete it in**  
**, all folders**

1. Template is now in the Standalone Folder

2. To avoid duplication, remove original template from “My Favorites” by *Right-Clicking* and selecting “Remove Favorite”

# Tasking Module



# Tasking Module

Entered on	Activate Date	Subject	Status	Assignee	Tracked	Submitter
04 Dec 2007 0800	04 Dec 2007 0800	A. Wunderlich Telcon	Pending	USER, TEST	<input checked="" type="checkbox"/>	NURSE, KARI

*Available in  
Fail-over Mode*

Allows users to **create, assign, and track tasks** that can be but do not have to be patient or encounter specific. Note: This is a medically specific email/sticky note system.

# Tasking Module

File Edit View Go Tools Actions Help

Refresh New Task Delete Options Close

WUNDERLICH, ANNA W 30/818-11-8118 26yo F FM: 2LT DOB:05 Dec 1981

Entered on	Activate Date	Subject	Status	Assignee	Tracked	Submitter
04 Dec 2007 0800	04 Dec 2007 0800	A. Wunderlich Telcon	Pending	USER, TEST	<input checked="" type="checkbox"/>	NURSE, KAR

Let's explore some of the fields starting with "Assignee"

This is what displays when clicking on above task

**Subject**  
A. Wunderlich Telcon

Note History  
USER, TEST @ 04 Dec 2007 08:00 EDT  
Please place order for patient to pick up at pharmacy.

New Note

Append this Note to associated Encounter Note

**Assignee**  
USER, TEST

**Patient**  
WUNDERLICH, ANNA

**Encounter**

**Parameters**  
Priority: None Status: Pending  
Activate Date: 04 Dec 2007  Private

Track this item  
 Complete

Save Cancel

Next Slide

# Assignees in the Tasking Module

(Assignee = Who the task goes to)

**Subject**  
A. Wunderlich Telcon

**Assignee**  
 USER, TEST  
 NURSE, KAREN  
 USER, TEST  
 DOCTOR, DAVID

**Note History**  
 USER, TEST @ 04 Dec 2007 08:00 EDT  
 Please place order for patient to pick up at pharmacy.

**Clinician Search**

Search Criteria

Name:

Facility: CHCS II ITT Facility

Find only clinicians who have login accounts on this system.

Clinic: All

Clinicians Matching Search Criteria

- All
- AMBULATORY PROCEDURE UNIT
- CHCS II ITT DENTAL
- CHCS II ITT SRTS II
- CHCS II Test Clinic
- Emergency Clinic
- ENDOCRINOLOGY CLINIC
- FAMILY PRACTICE CLINIC

Find Select Clear Cancel

Clicking here  
will bring up  
“**Clinician  
Search**”  
Box

*Notice the many  
ways to search for  
an assignee for the  
task*

## Assignees in the Tasking Module

Clicking here will bring up this “Patient Search” Box

The screenshot shows the 'Assignee' dropdown menu in the Tasking Module. The dropdown is open, showing 'USER, TEST' as the selected option. Below it, the 'Patient' dropdown is also open, showing 'WUNDERLICH, ANNA' as the selected option. A red box highlights the '...' button next to the 'Patient' dropdown, and a red arrow points from this button to the 'Patient Search' dialog box. The 'Patient Search' dialog box is a modal window with a blue title bar and a close button. It contains several search fields: 'Quick Search', 'Last Name', 'First Name', 'DOB', 'UIC', 'SSN', 'FMP', 'Sponsor SSN', and 'Sex'. There are also buttons for 'Find', 'New Search', 'All Patients', 'Patient Details', and 'Search CHCS'. A checkbox labeled 'Find only patients enrolled in this facility.' is checked. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

*Remember- tasks are not limited to patients with encounters only*

# Encounters in the Tasking Module

Clicking here  
will bring up a  
list of  
Encounters to  
choose from

Subject  
A. Wunderlich Telcon

Note History  
USER, TEST @ 04 Dec 2007 08:00  
Please place order for patient

Assignee  
USER, TEST

Patient  
WUNDERLICH, ANNA

Encounter

Parameters  
Priority: None Status: Pending  
Activate Date: 04 Dec 2007  
Private

Encounters

03 Dec 2007 1704 EST
08 Nov 2007 1212 EST
04 Nov 2007 2000 EST

OK Cancel

These are related to  
"ANNA WUNDERLICH"  
above

# Tasking Module Overview

Entered on	Activate Date	Subject	Status	Assignee	Tracked	Submitter
04 Dec 2007 0800	04 Dec 2007 0800	A. Wunderlich Telcon	Pending	USER, TEST	<input checked="" type="checkbox"/>	NURSE, KAR

**Subject**  
A. Wunderlich Telcon

**Assignee**  
USER, TEST

**Patient**  
WUNDERLICH, ANNA

**Encounter**  
11/4/2007 8:00:00 PM

**Parameters**

Priority: None      Status: Pending

Activate Date: 04 Dec 2007       Private

Track this item  
 Complete

Append this Note to associated Encounter Note

Save      Cancel

Note that when a patient and encounter are selected, this option is now available to check

Must check this box for the information to be entered into the Note

# Tasking Module Overview

Clicking here will reveal this  
“Tasking Search Selections”  
Box

Tasking Search Selections

Assignees

- Me
- All for this Clinic(s)
- Selected Personnel

Clinics

- AMBULATORY PROCEDURE UNIT (APCU-AMBULATORY PR)
- CHCS II ITT DENTAL (CAA--DENTAL CARE)
- CHCS II ITT SRTSII (HC2T--CHCSII-T)
- CHCSII Test Clinic (HC2T--CHCSII-T)
- Emergency Clinic (BIAQ--URGENT CARE UNIT SB)
- GENERAL SURGERY SAME DAYC (HC2T--CHCSII-T)

Activate Date

- Currently Active
- One Date: 09 Dec 2007
- Date Range: 09 Dec 2007 thru 09 Dec 2007

Filter Options

- Any Priority
  - (None)
  - High
  - Low
- Any Status
  - Pending
  - In Progress
  - Completed
- My Tracked Items

Set Column Order as Defaults    Restore Column Order Defaults    Set Selections as Default    OK    Cancel

Note how this  
can help sort  
tasks

# Tasking Module Overview

So, what is this task?

File Edit View Go Tools Actions Help  
Refresh New Task Open Encounter Delete Opti

WUNDERLICH, ANNA W 30/818-11-8118 26yo F FM: 2LT DOB:05 Dec 1981

Entered on	Activate Date	Subject	Status	Assignee	Track	Submitter	Patient
04 Dec 2007 0800	04 Dec 2007 0800	A. Wunderlich Telcon	Pending	USER, TEST	<input checked="" type="checkbox"/>	NURSE, KAREN	WUNDERLICH, ANNA

Subject: A. Wunderlich  
Note History: USER, TEST Please place  
New Note:   
 Append this Note to associated

Assignee: USER, TEST  
Patient: WUNDERLICH, ANNA  
Encounter: 11/4/2007 8:00:00 PM  
Parameters: Priority: None Status: Pending Activate Date: 04 Dec 2007  Private  
 Track this item  
 Complete

Save Cancel

**“Karen Nurse”**  
started a New Task in  
regards to **“A.  
Wunderlich’s” T-con**

It was assigned to  
**Dr Test User** asking  
him to  
**“Please...pharmacy”**

# Tasking Module Overview

## Responding with a New Note

WUNDERLICH, ANNA W 30/818-11-8118 26yo F FM: 2LT DOB:05 Dec 1981

Entered on	Activate Date	Subject	Status	Assignee	Tracked	Submitter	Patient
04 Dec 2007 0800	04 Dec 2007 0800	A. Wunderlich Telcon	Pending	USER, TEST	<input checked="" type="checkbox"/>	NURSE, KAREN	WUNDERLICH, ANN.

1. Enter the note
2. Check "Append...Note" if you want this text to be added to the listed encounter
3. Save

**1**

New Note  
will refill med

Append this Note to associated Encounter Note

**2**

Parameters  
Priority: None  
Status: Pending  
Activate Date: 04 Dec 2007  
 Private  
 Track this item  
 Complete

**3** Save Cancel

Next Slide

# Tasking Module Overview

The screenshot shows a dialog box titled "Sign Appended Note". At the top left, a text input field contains the text "will refill med", which is highlighted with a red box. A red arrow points from this box to a large yellow text box in the center of the dialog. The yellow box contains the text: "Signing the note should enter the information into the encounter cited". Another red arrow points from the bottom of the yellow box to a "Sign" button located in the bottom right corner of the dialog, which is also highlighted with a red box. Below the "Sign" button is a "Cancel" button. At the bottom of the dialog, there is a section for "Enter Your Password:" with a masked password field, an "Auto-Print" checkbox, a "Taxonomy" dropdown menu, and a "Sensitive" checkbox. At the very bottom, a status bar reads "Final workload will be set to: Non-count".

will refill med

Signing the note should enter the information into the encounter cited

Enter Your Password: [masked]  Auto-Print Taxonomy [dropdown]  Sensitive **Sign**

Final workload will be set to: Non-count

# Creating New Tasks



# Creating New Tasks

1. "New Task"
2. No (want to use different pt)
3. Find pt and click "OK"

The screenshot shows a medical software interface with a menu bar (File, Edit, View, Go, Tools, Actions, Help) and a toolbar containing buttons like Refresh, New Task, and Delete. The main window displays a task for 'WUNDERLICH, ANNA W' with a status of 'Pending'. A 'New Tasking with patient' dialog box is open, asking 'Do you want to associate selected patient with new tasking?'. The 'No' button is highlighted. A 'Patient Search' dialog box is also open, showing search criteria for 'alexander violet' and a list of search results. The 'OK' button in the Patient Search dialog is highlighted. A yellow arrow points to the right with the text 'Next Slide'.

Entered	Activate Date	Subject	Status	Assignee	Tracked	Submitter	Patient
04 Dec 2007 0800	04 Dec 2007 0800	A. Wunderlich Telcon	Pending	USER, TEST	<input checked="" type="checkbox"/>	NURSE, KAREN	WUNDERLICH, ANNA

Patient Name	SSN	FMP/Sponsor SSN	DOB	Sex	Home Phone	Work Phone
ALEXANDER, VIOLET W	202-45-5743	20-202-45-5743	01/25/1962	F	(123)-333-3333	(123)-

# Creating New Tasks

The screenshot shows a software interface for creating new tasks. The interface is divided into several sections:

- Subject:** A text field containing "follow up appt".
- Note History:** An empty text area.
- New Note:** A text field containing "please book a follow up appt for patient".
- Assignee:** A dropdown menu showing "USER, TEST".
- Patient:** A dropdown menu showing "ALEXANDER, VIOLET W".
- Encounter:** A dropdown menu showing "9/3/2007 8:00:00 AM".
- Parameters:** A section containing:
  - Priority:** A dropdown menu showing "None".
  - Status:** A dropdown menu showing "Pending".
  - Activate Date:** A dropdown menu showing "09 Dec 2007".
  - Private:** A checkbox that is unchecked.
- Track this item:** A checked checkbox.
- Complete:** An unchecked checkbox.

At the bottom of the form, there are "Save" and "Cancel" buttons. A yellow box with a red border contains the following instructions:

1. Fill in all areas (except "Note History")
2. Don't forget to select an "Assignee" (as it is now, the current user is sending the task to his/her self)
3. Save and Sign\*

**\*Cannot sign notes in CTS/ATS- cannot show outcome**

# Tips to Speed-up AHLTA

- Do not run other programs even music while in clinic.
- Limit logged on user to 4 in a multiple user PC situation.
- Set monitor to best performance
- Make sure that you are only mapped to clinics that you work in.
- Have your virtual memory setting set to a minimum of 3500 and a maximum of 3800. (Your IMD shop may need to do this for you.)
- If your facility does not automatically turn every PC on and off at night, log off and hit restart as you are leaving.
- Under internet options, occasionally delete internet folders and cookies on your personal PC.



## Other web resources for AHLTA Information/How-To's

- Uniformed Services Academy of Family Physicians (USAFP): [www.usafp.org/AHLTA-Information-FAQs.html](http://www.usafp.org/AHLTA-Information-FAQs.html)
  - AHLTA 2-minute Pearls: [www.usafp.org/AHLTA-Information-FAQs.html#Pearls](http://www.usafp.org/AHLTA-Information-FAQs.html#Pearls)
- 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>
- DoD Dragon NaturallySpeaking resource:  
[www.nuance.com/mhs/](http://www.nuance.com/mhs/)

