



# Creating and Using Order Sets

## AHLTA-Theater

Order sets used in AHLTA-Theater are an effective tool for streamlining and standardizing the patient encounter documentation process by allowing for the prepositioning of multiple lab, radiology, pharmacy and procedure orders presented as a list for user selection in the A/P module. Order sets may also be referred to as A/P templates. Users can select from the prepositioned orders, modify the orders as necessary or add to the orders listed in the patient's encounter. Only selected orders from an order set will populate into the patient's encounter.

### Creating Order Sets

An order set in AHLTA-Theater can be created in one of two ways:

- Saving a current patient encounter as an order set
- Creating a test patient encounter for the purpose of building an order set

Due to the potential for error, it is encouraged that creating an order set be performed using a test patient in a test encounter. Once the order set has been created, the test orders can be discontinued and the encounter can be Facility Cancelled. To create an Order Set:

1. Log into AHLTA-Theater
2. Create an encounter for a test patient
  - a. Click the New Visit button
  - b. Search for a Test Patient
  - c. Select the Test Patient from the Search Results
  - d. Click the New Visit button
  - e. Click Encounter Summary
3. From the 'Current Encounter; screen or 'Folder List', click the **A/P button**
4. Click the **Order Lab, Order Rad** or **Order Med** tab
5. Search for the order to be listed in the order set
6. Complete the required fields for the order as needed

*A Clinical Impression must be entered to submit a radiology order. The Clinical Impression entered when creating the order set will be saved as the default when using that order in the order set. A standard Clinical Impression can be established for a problem focused order set or the Clinical Impression may be modified when the order set is loaded into the AHLTA-Theater encounter and selected for use. **The Clinical Impression field has an 80 character limit.***

7. Click **Submit** to add the order to the patient encounter
8. Add each order required for the order set to the patient encounter

*When orders are selected for an order set, the order details saved in the order set will be saved as the default selections for the order. All orders in an order set can be modified prior to loading into a patient's encounter.*

9. When all orders have been added to the encounter, close the A/P Module
10. An 'A/P Warning' dialogue box will open when orders have been submitted for a patient and the orders have not been associated with a diagnosis. Click **Yes** in the dialogue box
11. In the 'Action Bar', click **Save As Template**
12. In the 'Action Bar' click **Save As**
13. Click the 'Save in:' dropdown menu and select the appropriate clinic location for the order set to be saved or leave Personal as the default selection when creating a personal order set

*Order sets created by an individual provider and intended only for their use should always be placed in the 'Personal' folder.*

14. In the 'Template Name' field, type the name of the order set
15. Check or uncheck **Add to Favorites** as appropriate
16. Check **Shared** to allow the template to be searched and used by other users or leave unchecked to use as a personal template only
17. Click **Save**

The order set is now saved in the AHLTA-Theater database and can be searched and loaded into an open patient encounter from the 'Templates' module. Order sets that have been shared are searchable by all users with access to the clinic location the order set has been saved to.

18. Click **Close** to leave the Templates Module
19. Cancel any unnecessary orders or test orders entered for the purpose of creating an order set
  - a. From the 'Current Encounter' screen or 'Folder List', click the **A/P button**
  - b. Click the first order in the 'Orders & Procedures' pane
  - c. Click the **Delete** button in the 'Action Bar'
  - d. Delete each order listed in the 'Orders & Procedures' pane to discontinue the orders
20. If a test patient was used to create the order set, cancel the patient encounter
  - a. Close all modules and navigate back to the 'Outpatient Tracking' module
  - b. Click the test patient encounter 1 time to select it
  - c. Click the **Cancel** button in the 'Action Bar'
  - d. Click the **Facility Cancelled** radio button
  - e. Click **OK**

## Searching and Adding an Order Set to My Favorites Folder

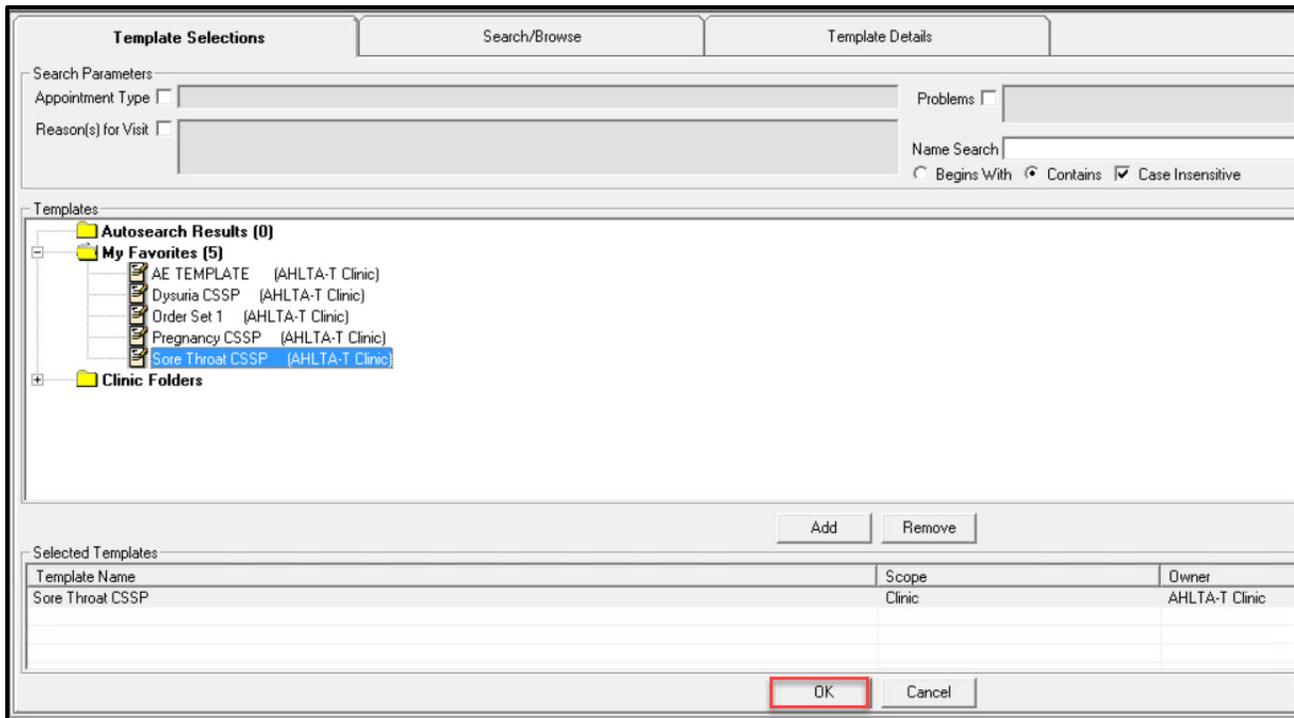
An order set must first be present in the AHLTA-Theater system by either having been imported from an outside source or having been previously created in the local database. Follow these instructions to search for an order set in the local database and add the order set to 'My Favorites' folder. Adding an order set to the 'My Favorites' folder will save time searching for commonly used order sets.

1. Log into AHLTA-Theater
2. Select the appropriate patient's open encounter either from the Outpatient Tracking screen or by searching the patient and selecting 'Current Encounter' in the Folder List
3. From the 'Current Encounter' module, select **Templates** from the Action bar
4. Click on the **Search** icon from the Action bar
5. Enter the name or partial name of the temple in to the **Template Name** field
6. Click **Search**
7. Templates meeting the search criteria will populate the 'Search/Browse' tab of the Template Management module
8. Click on the desired template one time to highlight
9. Right Click on the selected template to view options

**Add to Selected Templates:** This option will add the order set to the list of selected templates and navigate the user back to the Template Selections tab.

**Add to Favorites:** This option will add the template to the list of templates in the user's **My Favorites folder**, making the template available for easy selection during future patient encounters.

10. Select the **Add to Favorites** menu option
11. Navigate back to **Template Selections**
12. **Expand** the **My Favorites** folder to verify the template saved appropriately



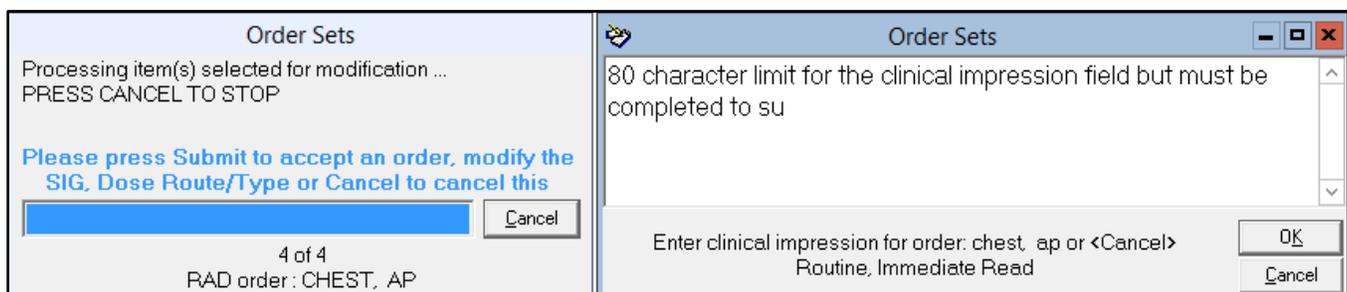
## Document Care Using an Order Set

Once an order set has been selected and loaded in to a patient's 'Current Encounter' module, the orders saved in the order set will be listed in the **Order Sets** tab of the **A/P Module**. Unless an order set is set as the 'Default Encounter Template', it is best practice to have the order set saved to the 'My Favorites' folder in the Templates Module for easy access. Follow these instructions for documenting care using an AHLTA-Theater order set:

1. Open a patient's encounter and navigate to the 'Current Encounter' module
2. Click the **A/P** button
3. Click the **Templates** button in the 'Action Bar'
4. **Expand** the 'My Favorites' folder or search for the order set
5. Double-click the order set to select the order set and populate the order set into the 'Selected Templates' pane at the bottom of the 'Templates' module window
6. Click the **OK** button to load the template into the selected patient's current encounter
7. In the 'A/P' module, click the **Order Sets** tab
8. Click the 'Select' check boxes for the order(s) to be placed in the patient's encounter. Unselected orders will not be placed into the patient's encounter.
9. The 'Select All' button will check all the 'Select' check boxes in the order set
10. The 'Modify' checkbox(es) will queue that specific order(s) to open in the appropriate tab for adjustments to the order's details. The 'Modify' checkbox may be selected or deselected for each order.

*The 'Modify' checkbox for all medication orders in an order set are automatically checked. The check boxes may be unchecked to accept the defaults of the order set. When the 'Modify' checkbox is selected, the orders will open in the Order Med tab for editing and verification. **It is encouraged that all medications be modified to ensure the correct 'Stop Date' is selected for the order. If not selected, the 'Stop Date' will default to the same day of the order and the medication will not be listed as an Active Medication in the patient's record when the stop date of the order has lapsed.***

11. When all orders have been checked as necessary, click the **Submit** button
12. An 'Order Sets' window will open. The orders marked as 'Modify' will open in the appropriate order tabs. Adjust the order(s) as necessary and click the **Submit** button to submit the order or click the **Cancel** button to remove the order(s) from selection.



Submitted orders will present in the patient's current encounter and be listed in the Order Management module for the respective ancillary services to view. Additional orders outside of the order set can be added to the patient's encounter as necessary.