



Encounter Templates

AHLTA-Theater

Encounter templates used in AHLTA-Theater are an effective tool used to streamline and standardize the patient encounter documentation process. An Encounter template consists of predefined data elements such as diagnoses, procedures, S/O note templates/AIM forms, and order sets which are pre-staged for user selection. Encounter templates are loaded into an open patient encounter through the Template Management module or by clicking the “Templates” icon from the Action Bar in the Current Encounter module. Encounter Templates can be created in the local AHLTA-Theater application or outside templates can be imported into the local database.

Search Encounter Templates and Add to My Favorites Folder

The encounter template 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 encounter template in the local database.

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 template 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.

Load an Encounter Template into a Current Encounter

The encounter template 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 load an Encounter Template into a patient's Current Encounter module.

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. Expand the appropriate folder to view the list of templates in the folder. Double click the desired template from the list to populate the **Selected Templates** pane below.
5. If the encounter template is not already available in the **My Favorites** or **Clinic Folders**, click on the **Search** icon from the Action bar to search for the encounter template in the database, then **Add to Selected Templates**.
6. With the required template populated in the **Selected Templates** pane, click **OK** to load the template into the current patient encounter.

The Template Management module will close and the predefined template data elements will be loaded into the appropriate modules of the patient's encounter available for user selection.

The screenshot shows the 'Template Selections' window in AHLTA-Theater. The 'Search/Browse' tab is selected. Search parameters include Appointment Type, Reason(s) for Visit, Problems, and Name Search (with radio buttons for 'Begins With', 'Contains', and 'Case Insensitive'). The 'Templates' section shows a tree view with 'My Favorites (5)' and 'Clinic Folders'. Under 'My Favorites', several templates are listed, including 'Sore Throat CSSP (AHLTA-T Clinic)' which is highlighted. Below the tree view are 'Add' and 'Remove' buttons. The 'Selected Templates' section at the bottom contains a table with the following data:

| Template Name | Scope | Owner |
|------------------|--------|----------------|
| Sore Throat CSSP | Clinic | AHLTA-T Clinic |

'OK' and 'Cancel' buttons are located at the bottom right of the window.

Document Care using an Encounter Template

Once an Encounter Template has been selected and loaded in to a patient's Current Encounter module, the data elements of the selected encounter template will load into each of the corresponding modules and the data elements defined in the template will present as a list available for user selection. The users can select from the predefined lists but also have the ability to search for additional data elements to add as necessary. If the predefined data is not selected from the lists, those data elements will not automatically populate into the patient's note. This ensures that only selected data will populate the patient's medical record.

1.1. S/O Module

When S/O note templates or AIM forms are included as part of an Encounter Template, the S/O note templates or AIM forms will automatically populate when the S/O module is selected. If more than one S/O note template or AIM form is included in the template, the additional note templates will populate in the S/O user favorite dropdown menu in the S/O module. The S/O note selection can be overridden once the module has been opened by selecting a different note template from the user favorite dropdown menu or by searching and selecting a different S/O note template.

1.2. A/P Module

Information such as diagnoses, procedures and order sets may be predefined for use in an Encounter Template.

1. Click on the **Diagnosis** tab to select from the list of diagnoses predefined in the selected template.
2. Click on the **Order Sets** tab to select from the list of patient orders predefined in the selected template.
 - a. Click on each individual order to select or click the **Select All** button
 - b. When a medication order is selected, the "Modify" checkbox will automatically be selected. To accept the defaults of the selected order, uncheck the Modify box corresponding to the order

*Order sets are only utilized in a clinic facility that **does not** have a TC2 system present. If a TC2 system is present, utilize the order sets present in TC2 only.*

3. Click on the **Procedure** tab to select from the list of procedures predefined for use in an Encounter Template.

| Select | Name | Details | Modify |
|-------------------------------------|----------------------------------------|-----------|-------------------------------------|
| <input checked="" type="checkbox"/> | Normal Saline 0.9 % injection solution | IV #1 RFO | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> | LIVER PANEL | Routine | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | CBC W/O DIFF | Routine | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | CBC W/AUTO DIFF | Routine | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | CT, ABD W/O CONTRAST | Routine | <input type="checkbox"/> |

UnSelect All Select All Refresh Data Submit

View Encounter Template Details

Prior to loading a template into the Current Encounter of a patient's record, it may be necessary to view the template details to ensure the template is correct and adequate for the documentation requirements. To view the details of an Encounter Template:

1. Log into AHLTA-Theater.
2. In the Folder List, expand **Tools** folder.
3. Click on **Template Management**.
4. Click **Search** icon from the Action bar.
5. Search for the required template.
6. Double click the desired template to open the **Template Details** tab.
7. The details of the template will populate in each pane in the Template Details tab.

Template Selections Search/Browse Template Details

Template Name: Sore Throat CSSP
Owner Type: Clinic
Clinic: AHLTA-T Clinic
Specialty:
EM Code Category:

Associated Reasons for Visit
Add...
Remove

Associated Problems
Add...
Remove

Diagnoses
Acute pharyngitis, unspecified:J02.9
Pain in throat:R07.0
Cough:R05
Add...
Remove

Notes Templates
[Form] DHA CSSP - Adult Sore Throat~197
Add...
Remove

Patient Instructions
Add...
Remove

Associated Appointment Types
ROUTN
Add...
Remove

Items to Autocite into Note
Active Medications
Active Problems
Allergies
Add...
Remove

Procedures
Streptococcus Direct Screen 87880
Add...
Remove

Orders
Add...
Remove

Activate Windows
Go to System in Control Panel to activate Windows.