For All Roles

General AHLTA Information

Remove Tool Bar

1. Select **Tool Bar** from *View* drop-down menu.
2. Select **None**.

Set Startup Options

1. Select **Startup Options** from *Tools* drop-down menu.
2. Select startup option.
3. Click **OK.**

Set Appointment Properties

1. Select **Change Selections** button or **Options** on the Pt ID Line.
2. Select **Clinic** and **Provider** preferences.
3. Select **Today Only.**
4. Select **Set Selections as Default** button.

Set Appointment Display

1. Click and drag column to preferred place.
2. Select **Change Selections** button.
3. Select **Set Column Order as Defaults** button.

Lock and Unlock Workstation

1. Press **CTRL + Z** keys to lock.
2. To Unlock Workstation, select application from *Status* bar.
3. Re-enter your *Password.*

AHLTA Help

1. Select **Help Topics** from the *Help* drop-down menu.
2. Search by module or key word.

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GLOBAL INFORMATION for QUALITY CARE

Clerk/Records Review Quick Reference Guide (QRG)

Search for a Patient

1. In *Folder List*, click **Search.**
2. Enter search criteria into appropriate fields.
3. Click **Find.**
4. Select appropriate patient and click **OK.**

Create a Walk-In/Sick Call Appointment

1. Click **New Appt** on Action Bar.
2. Conduct patient search, if required.
3. Verify **Assigned Clinic** and **Provider;** select **Appointment Type;** enter **Reason for Appointment,** select **USV Type** and select **Related to Injury/Accident?** if required.
4. Click **OK.**

Cancel an Appointment/Telcon

1. Select appointment/telephone consult to be canceled.
2. Click **Cancel** on the Action Bar.
3. Select appropriate reason for cancellation and click **OK.**

Undo a Cancelled Appointment

1. Select cancelled appointment.
2. Click **Undo Cancel** on the Action Bar.
3. Click **Yes** to restore cancelled appointment.

Transfer a Appointment/Telcon

1. Select appointment/telephone consult to transfer and click **Transfer** on the Action Bar.
2. Select *Provider* from *New Provider* drop-down list and Click **OK.**

Create a Telephone Consult

1. In *Folder List* click **Telephone Consult.**
2. Click **New Telcon** on Action Bar.
3. Conduct a patient search, if required.
4. Verify **Assigned Clinic** and **Provider;** enter **Reason for Telephone Consult,** edit **Call Back Number,** set **Urgency,** and complete **Notes** section.
5. Click **OK.**

Verify a Patient's Demographics

1. Select the patient.
2. In *Folder List*, click **Demographics.**
3. Verify the patient's information.

Edit a Patient's Demographics

1. Select the patient.
2. In *Folder List*, click **Demographics.**
3. Verify the patient's information.
4. Click **Edit** on the Action Bar.
5. Edit pertinent patient information.
6. Click **Save** icon on the Action Bar.
7. Click **Close** on the Action Bar.

Note: It is recommended to edit patient information in CHCS as the information in AHLTA does not write back to CHCS at this time.

View a Patient's Previous Encounter

1. Select the patient.
2. In *Folder List*, click **Previous Encounters.**
3. Select encounter to review.

Run a Report

1. In *Folder List*, click **Reports.**
2. Select desired report.
3. Select parameters.
4. Run Report.
5. Close module