

How to Create an Order Set in AthenaHealth

Order sets in AthenaHealth let you bundle a diagnosis with its related lab or other orders so you can apply them together during a patient encounter instead of adding each item individually. This guide walks you through how to create an order set in AthenaHealth, from opening the configuration screen to building a standalone lab order set and a diagnosis-linked order set, and then applying both during a patient encounter.

Prerequisites

- An active AthenaNet account with access to the settings configuration menu.
- Access to the **Manage My Order Sets** configuration page.
- Knowledge of the lab test names, diagnosis codes, and lab facility you want to associate with your order set.

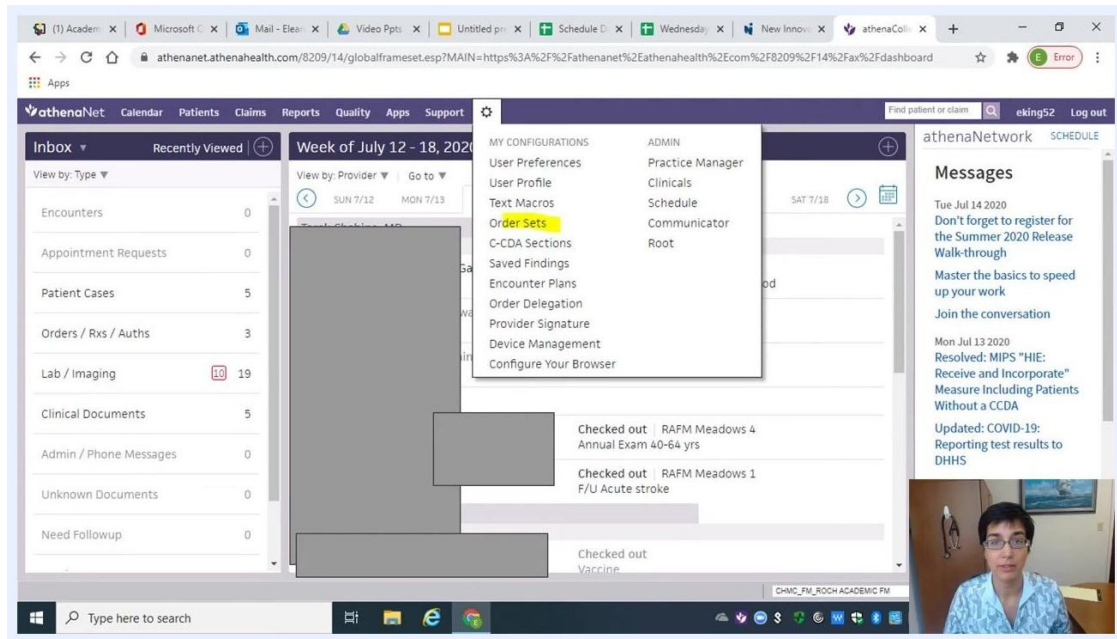
Open the order set configuration

Step 1: Access the AthenaNet platform

Log in to your AthenaNet account to begin.

Step 2: Open the settings menu

Click the cogwheel (settings) icon in the top navigation bar. The navigation bar also displays tabs for Calendar, Patients, Claims, Reports, Quality, Apps, and Support, along with your weekly schedule view.

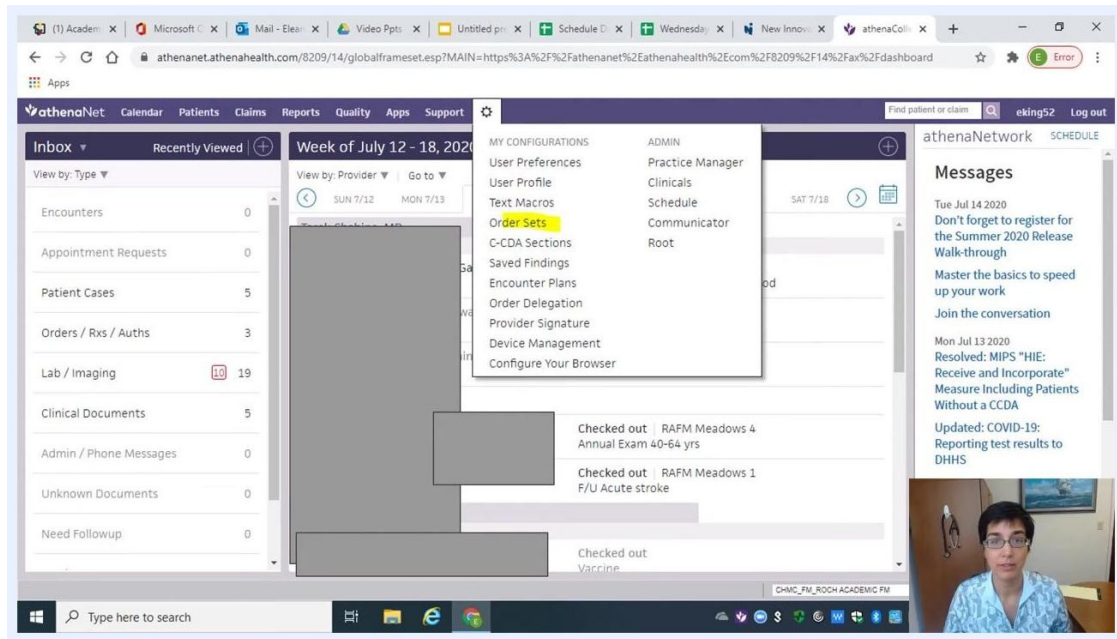


AthenaNet dashboard with the settings cogwheel icon circled in blue at the top, showing navigation tabs (Calendar, Patients, Claims, Reports, Quality, Apps, Support) and a weekly schedule view

In the dropdown menu, find the **MY CONFIGURATIONS** section and click **Order Sets**.

Step 3: Open "Manage My Order Sets"

On the **Manage My Order Sets** page, locate the **My Order Sets** section. Click **Add new** to start creating a new order set.

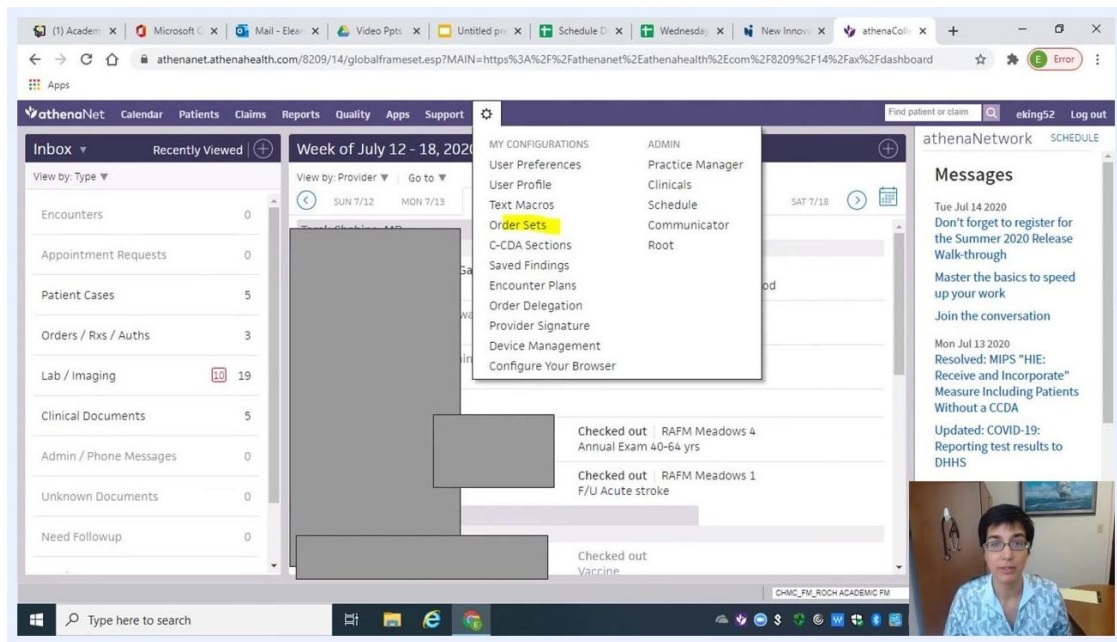


Manage My Order Sets screen with the "Add new" link circled in yellow, filter options for user, specialty, order set type, and search fields for order set name and diagnosis

Create a standalone lab order set

Step 4: Name your order set

In the **Add Order Set** section, enter a name in the **Order Set Name** field — for example, "King-Celiac." If you are creating a standalone order set that is not tied to a diagnosis, leave the **Ordering** and diagnosis fields blank.

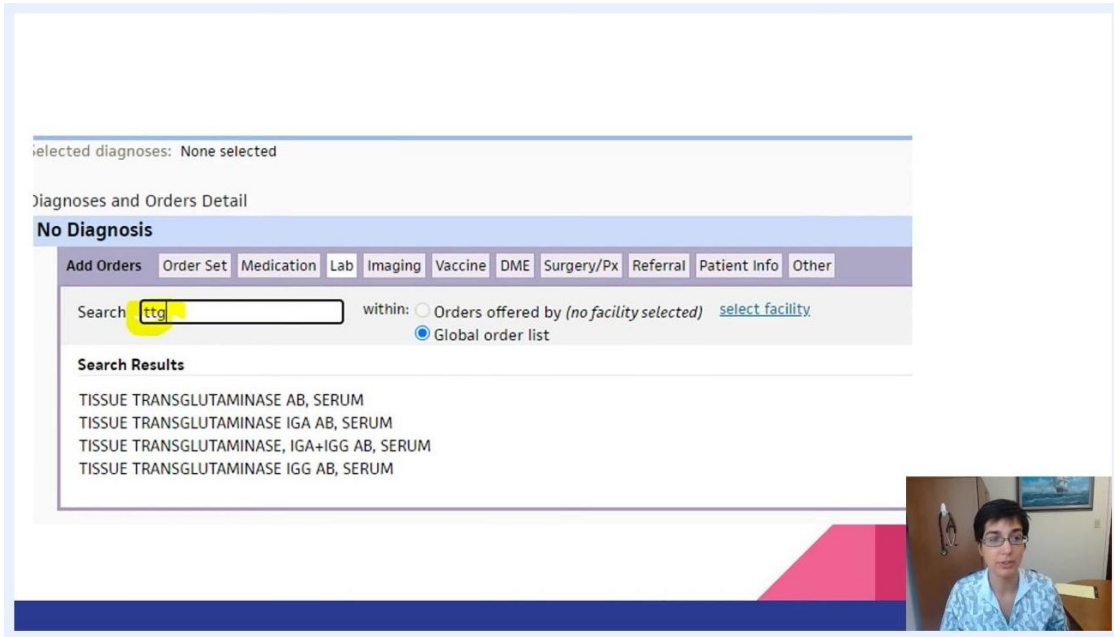


Add Order Set screen with the "Order Set Name" field highlighted, ready for input

Confirm that the **Diagnoses** section shows "no items found" and "Selected diagnoses: None selected" — this verifies you are building an order set without a diagnosis attached.

Step 5: Search for a lab order

Click the **Lab** tab in the **Diagnoses and Orders Detail** section. In the **Search** field, type **ttg** to find celiac-related tests.



The screenshot shows a web application interface for 'Diagnoses and Orders Detail'. At the top, it says 'Selected diagnoses: None selected'. Below this is a tabbed interface with the 'Lab' tab selected. The search field contains 'ttg' and is highlighted with a yellow box. The search results are displayed below the search field, listing four tissue transglutaminase tests. A small video inset of a person is visible in the bottom right corner of the interface.

Selected diagnoses: None selected

Diagnoses and Orders Detail

No Diagnosis

Add Orders Order Set Medication **Lab** Imaging Vaccine DME Surgery/Px Referral Patient Info Other

Search **ttg** within: ☐ Orders offered by (no facility selected) [select facility](#)
☒ Global order list

Search Results

- TISSUE TRANSGLUTAMINASE AB, SERUM
- TISSUE TRANSGLUTAMINASE IGA AB, SERUM
- TISSUE TRANSGLUTAMINASE, IGA+IGG AB, SERUM
- TISSUE TRANSGLUTAMINASE IGG AB, SERUM

Lab tab selected, "ttg" entered in the search field, with search results for tissue transglutaminase tests displayed

Review the results and click **TISSUE TRANSGLUTAMINASE IGA AB, SERUM** to select it.

Step 6: Expand the lab order

Click on the test name you selected to expand its configuration options.

AthenaNet Calendar Patients Claims Reports Quality Apps Support

Diagnoses and Orders Detail

No Diagnosis

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Info Other

***TISSUE TRANSGLUTAMINASE IGA AB, SERUM**

Send To [*Search](#)

Lab Order Details ⓘ There is no data available because no lab facility is selected.

Priority ☐ STAT ☐ Standing Future Submission

Alarm 1 week

Note to Lab

Internal Note

Apply to All Lab Orders in Encounter

Specimen Collection ☒ External Lab ☐ Office ☐ Home ☐ Add On

Specimen [Document specimen](#)

Submitter

Lab order selected and expanded, showing the "Search" link for lab facility and specimen collection options

Step 7: Select the lab facility

Next to **Send To**, click **Search** to choose a lab facility. In the search dialog, type **ATLAS**. Select **ATLAS** — it is marked with a star, indicating it is the preferred lab.

Confirm that **Send To** now displays "ASCENSION MICHIGAN LAB SERVICES - ATLAS INTERFACE," and that specimen collection is set to **Office** (not External Lab).

Diagnoses and Orders Detail

No Diagnosis

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Info Other

TISSUE TRANSGLUTAMINASE IGA AB, SERUM

Send To ★ ASCENSION MICHIGAN LAB SERVICES - ATLAS INTERFACE; FOR DRAW STATIONS, SEE LAB LOCATION MAP STE 101, GROSSE POINTE, MI

Lab Order Details ⓘ The selected lab facility does not offer this lab order.

Priority ☐ STAT ☐ Standing Future Submission

Alarm 1 week

Note to Lab

Internal Note

Apply to All Lab Orders in Encounter

Specimen Collection ☐ External Lab ☒ Office ☐ Home ☐ Add On

Specimen [Document specimen](#)

Submitter



Order details with "Send To" set to ATLAS INTERFACE and "Office" selected for specimen collection

Step 8: Save the lab order

Scroll down and click **Add** to save the configured lab order to your order set.

Diagnoses and Orders Detail

No Diagnosis

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Info Other

TISSUE TRANSGLUTAMINASE IGA AB, SERUM

Send To ★ [ASCENSION MICHIGAN LAB SERVICES - ATLAS INTERFACE: FOR DRAW STATIONS, SEE LAB LOCATION MAP STE 101, GROSSE POINTE A](#)

Lab Order Details ⓘ The selected lab facility does not offer this lab order.

Priority ☐ STAT ☐ Standing Future Submission

Alarm 1 week

Note to Lab

Internal Note

Specimen Collection ☐ External Lab ☒ Office ☐ Home ☐ Add On

Specimen [Document specimen](#)

Submitter

The "Add" button circled at the bottom of the order configuration screen, with Office selected for specimen collection

Use the order set during an encounter

Step 9: Find your order set in the encounter

In your patient encounter, go to the **Assessment & Plan** section and click the plus sign (+) to add a diagnosis and orders. Start typing the name of your order set — for example, [King-Celiac](#).

Diagnoses and Orders Detail

No Diagnosis

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Info Other

TISSUE TRANSGLUTAMINASE IGA AB, SERUM

Send To ★ ASCENSION MICHIGAN LAB SERVICES - ATLAS INTERFACE: FOR DRAW STATIONS. SEE LAB LOCATION MAP STE 101, GROSSE POINTE A

Lab Order Details ⓘ The selected lab facility does not offer this lab order.

Priority ☐ STAT ☐ Standing Future Submission

Alarm 1 week

Note to Lab

Internal Note

Specimen Collection ☐ External Lab ☒ Office ☐ Home ☐ Add On

Specimen [Document specimen](#)

Submitter

Assessment & Plan section with "King-Cel" typed in the search field, showing the "King-Celiac" order set highlighted

When your order set appears under **Order Sets**, click on it.

Step 10: Apply the order set to a diagnosis

Drag and drop the order set (for example, "King-Celiac") onto the relevant assessment or diagnosis in your plan. The TTG lab order, already configured with the ATLAS lab and Office specimen collection, populates automatically.

Note: Always verify that the correct lab and specimen collection options are selected before saving, and use a unique naming convention so you can quickly locate your custom order sets in future encounters.

Create an order set linked to a diagnosis

Step 11: Start a new order set

Click to add another new order set. In the **Order Set Name** field, enter a descriptive name — for example, [King-Low Vitamin D](#) or [King D Deficiency](#). Fill in the **Ordering** field as needed, then click the **Search** tab under **Diagnoses**.

AthenaNet Calendar Patients Claims Reports Quality Apps Support ⚙️

Diagnoses

Quickpicks **Search** Diagnosis Order Set

- Vitamin deficiency
- Vitamin P deficiency
- Vitamin K deficiency
- Vitamin D deficiency
- Deficiency of vitamin D3
- Deficiency of vitamin D2
- Vitamin A deficiency
- Deficiency of vitamin K2

Selected diagnosis: Vitamin deficiency

Diagnoses and Orders Detail

1. Vitamin deficiency
ICD-10 code: E56.9: Vitamin deficiency, unspecified [Edit specificity](#)

Add Orders Order Set Medication **Lab** Imaging Vaccine DME Surgery/Px Referral Patient Info Other

No Diagnosis

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Info Other

Add Cancel

Add Order Set screen with the "Order Set Name" field and "Search" tab highlighted, no diagnosis selected yet

Step 12: Search and select the diagnosis

In the **Search** field under Diagnoses, type **Vitamin D Def.** Review the results and select **Vitamin D deficiency**.

Diagnoses

Quickpicks Search Diagnosis Order Set

- Vitamin deficiency
- Vitamin P deficiency
- Vitamin K deficiency
- Vitamin D deficiency
- Deficiency of vitamin D3
- Deficiency of vitamin D2
- Vitamin A deficiency
- Deficiency of vitamin K2

Selected diagnosis: Vitamin deficiency

Diagnoses and Orders Detail

1. Vitamin deficiency
ICD-10 code: E56.9: Vitamin deficiency, unspecified [Edit specificity](#)

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Inf

Search vitamin within: ☐ Orders offered by (no facility selected) [select f](#)
☒ Global order list

Search Results

- VITAMIN D, 25-HYDROXY, TOTAL, SERUM
- VITAMIN B12, SERUM
- VITAMIN B6 (PYRIDOXINE), PLASMA
- VITAMIN A (RETINOL), SERUM
- VITAMIN B1 (THIAMINE), BLOOD

Diagnosis search field with "Vitamin D Def" entered and "Vitamin D deficiency" selected, showing ICD-10 code E56.9

Confirm the selected diagnosis appears below as "1. Vitamin deficiency" with ICD-10 code E56.9 (Vitamin deficiency, unspecified).

Step 13: Attach the lab order

With the diagnosis selected, click the **Lab** tab in the **Diagnoses and Orders Detail** section. In the **Search** field, type **vitamin**, then select **VITAMIN D, 25-HYDROXY, TOTAL, SERUM** from the results.

The screenshot displays the 'Diagnoses and Orders Detail' section of an EHR system. The 'Lab' tab is selected among other options like 'Add Orders', 'Order Set', 'Medication', 'Imaging', 'Vaccine', 'DME', 'Surgery/Px', 'Referral', and 'Patient Info'. The search field contains the text 'vitamin'. Below the search field, the search results are listed, with 'VITAMIN D, 25-HYDROXY, TOTAL, SERUM' being the first result. A small video inset in the bottom right corner shows a person in a blue patterned shirt.

Lab tab selected, "vitamin" entered in the search field, with "VITAMIN D, 25-HYDROXY, TOTAL, SERUM" visible in the results

Step 14: Configure the lab order

Click on the selected lab order to expand its configuration options. Confirm that **Send To** is set to "ASCENSION MICHIGAN LAB SERVICES - ATLAS INTERFACE," and under **Specimen Collection**, select **Office** (not External Lab, Home, or Add On).

Diagnosis Order Set

Quickpicks Search

- Vitamin deficiency
- Vitamin P deficiency
- Vitamin K deficiency
- Vitamin D deficiency
- Deficiency of vitamin D3
- Deficiency of vitamin D2
- Vitamin A deficiency
- Deficiency of vitamin K2

Selected diagnosis: Vitamin deficiency

Diagnoses and Orders Detail

1. Vitamin deficiency
ICD-10 code: E56.9: Vitamin deficiency, unspecified [Edit specificity](#)

Add Orders Order Set Medication Lab Imaging Vaccine DME Surgery/Px Referral Patient Info

Search within: ☐ Orders offered by (no facility selected) [select f](#)
☒ Global order list

Search Results

- VITAMIN D, 25-HYDROXY, TOTAL, SERUM
- VITAMIN B12, SERUM
- VITAMIN B6 (PYRIDOXINE), PLASMA
- VITAMIN A (RETINOL), SERUM
- VITAMIN B1 (THIAMINE), BLOOD

Lab order configuration expanded, with "Send To" set to ATLAS INTERFACE and "Office" selected for specimen collection

Step 15: Review the order set details

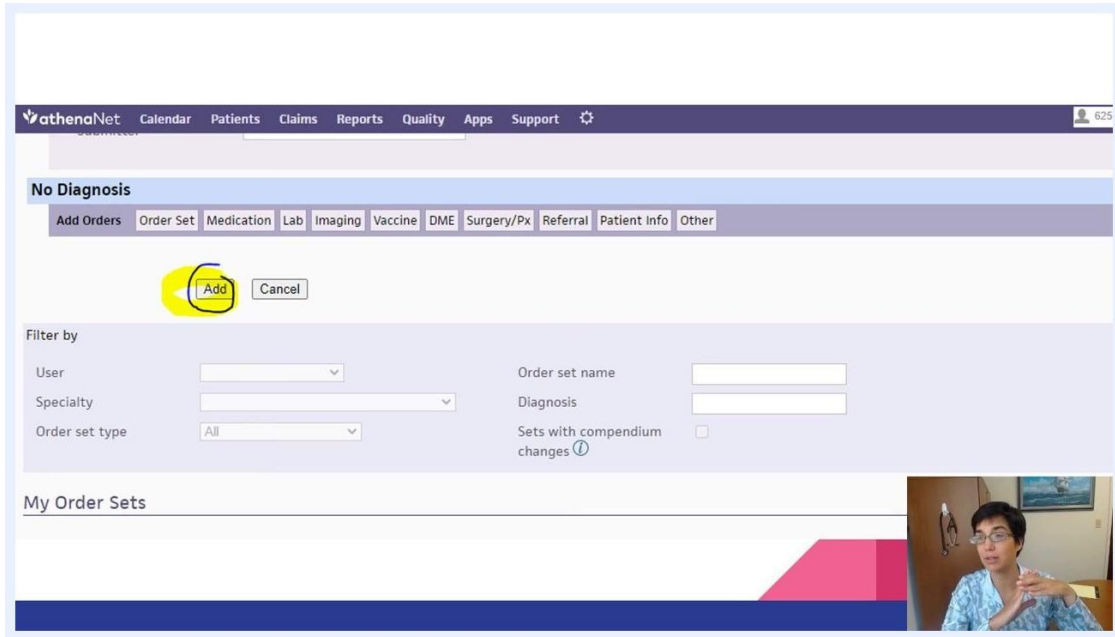
Before saving, confirm all required fields are complete:

- **Order Set Name** (for example, [King-Low Vitamin D](#))
- **Diagnosis** (for example, [Vitamin D deficiency](#), ICD-10 code E56.9)
- **Lab Order** (for example, [VITAMIN D, 25-HYDROXY, TOTAL, SERUM](#))
- **Send To** (for example, [ASCENSION MICHIGAN LAB SERVICES - ATLAS INTERFACE](#))
- **Specimen Collection** (for example, [Office](#))

Double-check that the correct diagnosis and lab order are linked together.

Step 16: Save the order set

Click **Add**, located near the top left of the order set configuration screen, to save your custom order set.



Order set configuration screen with the "Add" button circled and highlighted, showing tabs for Add Orders, Order Set, Medication, Lab, and Imaging

Apply the order set during a patient encounter

Step 17: Apply your custom order set

In your patient note, navigate to the **Assessment & Plan** section and click the add button (+) to add a diagnosis and orders. Type the name of your custom order set — for example, [King-Vitamin D deficiency](#) — and select it from the results.

The system automatically adds:

- The lab order for Vitamin D, 25-Hydroxy, Total, Serum, configured for the ATLAS lab and Office specimen collection.
- The assessment of Vitamin D deficiency with the correct ICD-10 code (E56.9).

Both the diagnosis and the lab order are linked together in your note.

Note: Always verify that the correct lab and specimen collection options are selected before saving, and use a unique, memorable naming convention for your order sets so you can find them quickly in future encounters.

Summary

By following these steps, you now know how to create an order set in AthenaHealth — both as a standalone lab order set and as a diagnosis-linked order set — and how to apply it efficiently during patient encounters so that your diagnoses and lab orders stay consistently linked in your documentation.