**ORCHID Basic Set Up**

**Basics**

1. Sign on to ORCHID
2. Click on the Home icon on the top menu bar to enter ambulatory workflow.
* On the left, you will see the Message Center; on the right is the Ambulatory Organizer, your clinic schedule.
1. To see your schedule of patients, click “Patients for:” in the Ambulatory Organizer, and add your name.
2. Click the “Refresh” button frequently to update your screen; otherwise, new data will not be updated.

**Inbox**

* 1. Ensure default display is 90 days. Go to Message Center🡪Inbox🡪 manage pref🡪 behavior prefs 🡪 default 90 days
	2. Save Inbox attending, Inbox MA, RN Care giver and service coordinator as favorites

**Sending/Receiving Messages**

* 1. To send a message or to document a phone call:
		+ Open patient’s chart, click the triangle next to the Communicate icon (top menu bar) and select Message
			- Decide who to send the message to and whether to save to chart
	2. To review/address messages sent to you, click on “Message Center” in your Inbox.
		+ When sending any message, *always* CC your inbox attending or your clinic preceptor
	3. Add recipient favorites: inbox MA, RN, Attending, Records Retrieval, SW DME, Pharmacy, ACC, US, CT, MRI

**Reminder Messages**

1. Use this function to set a reminder for yourself (i.e. remind me to ensure patient scheduled CT scan)
2. Click the triangle next to the Communicate icon and select Reminder.
3. Be sure to: click Include Me; un-select Save to Chart; write the task you’d like to F/U on; select when you’d like the reminder to show up in your inbox by adjusting the Show Up time at the bottom

**Patient Letters**

1. To create a patient letter, Click the triangle next to the Communicate icon and select Patient Letter.
2. Write your letter on the top half of the screen and be sure to either print now or send to a staff member

**Set Up Ability to See Future Appointments**

* + - * 1. Click on Scheduling Appt Book 🡪 View 🡪 Options 🡪 Appt 🡪 Display future requests/appts

**Set up Provider View**

1. Set up Tabs: Admit/Clinic, General medicine
2. Set up Rows: Visits, Intake Info, Vital Signs, CC, Home Meds, Consolidated Problems, A/P, Recommendations, Immunization, Documents, Labs, Diagnostics, Microbiology, Pathology, Histories, Patient Education, Subjec, Objec
	* Move Subjective/HPI and Objective/Physical Exam to right side of screen
	* Change Zoom % to ensure all columns fit on your screen

**Organizing General Medicine Tab (where you place orders)**

 a. Click the drop-down menu at the top right portion of the screen to:

* + Change the number of columns on the screen (4 is recommended) by clicking View Layout
	+ Move folders to different parts of your screen by clicking Drag and Drop
	+ Remove folders that are not necessary by clicking on Components
	+ Add your own folders with relevant labs, imaging, Amb Com orders by clicking “Add Folders”

**Setting up Favorites (Labs/Imaging/Vaccines/Amb Comm orders)**

1. To add to favorites:
* Place order; before signing order, right click on “Add to Favorite”, add to existing folder or create new one
* To Organize favorites
	+ 1. Click on “Order Add”, click on drop down tab to right of yellow star logo, click “Organize Favorite”
		2. You can create folders, move items to different folders and delete duplicate orders

**Setting a Proxy**

1. Proxying allows you to cover the inbox of another provider or allows another provider to cover your inbox
* To set a proxy, click Message Center, then “Proxies”, then “Manage”
	1. If you will be covering someone else, click “Received” then “Add”
	2. If someone else will be covering you, click “Given” then “Add”
* Fill in the required boxes, being sure to set the appropriate begin/end dates and select “Grant All”
* Check under “Proxy” tab to see messages for provider you are proxying; messages will NOT be in your own inbox!

**Creating an Auto Text**

1. Open a new ORCHID message and click “Manage Auto Text” icon. Click on + (left upper corner)
2. Add abbreviation. Recommend choosing with “..your initial” i.e: ..ssMedRefill). Add text and click Save.