

## ORCHID Basic Set Up

### Basics

- a. Sign on to ORCHID
- b. 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.
- c. To see your schedule of patients, click “Patients for:” in the Ambulatory Organizer, and add your name.
- d. Click the “Refresh” button frequently to update your screen; otherwise, new data will not be updated.

### Inbox

- a. Ensure default display is 90 days. Go to Message Center→Inbox→ manage pref→ behavior prefs → default 90 days
- b. Save Inbox attending, Inbox MA, RN Care giver and service coordinator as favorites

### Sending/Receiving Messages

- a. 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
- b. To review/address messages sent to you, click on “Message Center” in your Inbox

### Reminder Messages

- a. Use this function to set a reminder for yourself (i.e. remind me ensure patient got CT scan done)
- b. Click the triangle next to the Communicate icon and select Reminder.
- c. 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

### Patient Letter

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

### Future Appointments (setting up ability to see future patient appts)

- a. Click on Scheduling Appt Book → View → Options → Appt → Disp future requests/appts

### Set up Provider View

- a. Set up Tabs: Admit/Clinic, General medicine
- b. Set up Rows: Visits, Intake Info, Vital Signs, Home Meds, Consolidated Problems, A/P, Recommendations, Immunization, Documents, Labs, diagnostics, microbiology, pathology
  - 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

- 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)

- a. 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
    - i. Click on “Order Add”, click on drop down tab to right of yellow star logo, click “Organize Favorite”
    - ii. You can create folders, move items to different folders and delete duplicate orders

### Setting a Proxy

- a. 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”
    - i. If you will be covering someone else, click “Received” then “Add”
    - ii. 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 proxying (i.e. messages will NOT come to your own inbox)

### Creating an Auto Text

- a. Open a new ORCHID message and click “Manage Auto Text” icon. Click on + (left upper corner)
- b. Add abbreviation. Recommend choosing with “..your initial” i.e: ..ssMedRefill). Add text and click Save.
  - You can now use your auto text by typing the abbreviation you chose for this auto text