

Finding, Viewing, Modifying, & Signing Saved Clinical Notes

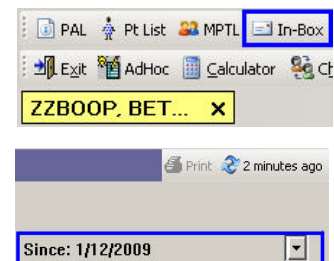
The InBox is used by nursing in the following scenarios:

- Saving documents as part of one's normal workflow
- Viewing documents forwarded by other providers
- To respond to the automated InBox notification email

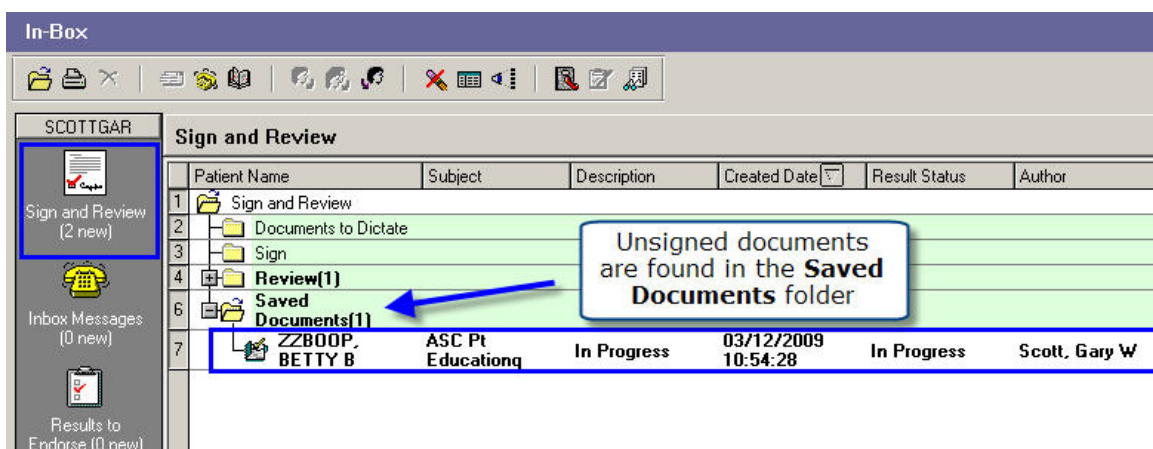
Finding Saved Documents from Your Inbox

All clinical notes, when saved, are now viewable in the ORCA **InBox**. The **InBox** has four document folders, from top to bottom: **Anticipated**, **Sign**, **Review**, and **Saved**. All saved documents will appear in the **Saved** folder (not PowerNotes).

1. From the **Organizer Toolbar**, select **InBox**
2. **Refresh**
3. All saved clinical notes from the last 60 days will be displayed.



Note: To increase date range, click on the down arrow in the upper right-hand corner of the Working Pane below the Refresh icon and choose the appropriate amount of time.



In-Box

SCOTTGAR

Sign and Review

	Patient Name	Subject	Description	Created Date	Result Status	Author
1			Sign and Review			
2			Documents to Dictate			
3			Sign			
4			Review(1)			
6			Saved Documents(1)			
7	ZZBOOP, BETTY B	ASC Pt Educationq	In Progress	03/12/2009 10:54:28	In Progress	Scott, Gary W

Unsigned documents are found in the **Saved Documents** folder

Viewing Forwarded Documents from Your Inbox

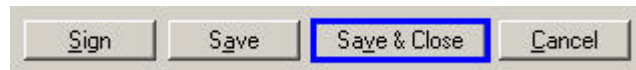
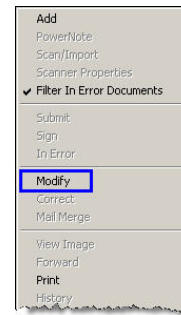
1. Double-click on the document in your **Inbox** to open it
2. Click **OK** or **OK & Next** to sign the document (this signifies you have reviewed the document and will remove it from your **InBox**)



Note: OK & Next will sign the document and open the next document in your Inbox if you have more than one to sign. OK will sign the document and continue to display the signed document.

Modify Saved Documents from Your Inbox

3. Double-click on the document in your **Inbox** to open it
4. Right-click within the document
5. Click **Modify Document** from the menu
6. Make changes to the document
7. Click **Save & Close** to close the document and return to the **Sign and Review** window



Note: Save is like the auto-save function in Word. You may click it if you are concerned about losing documentation while you are in the progress of typing

8. Click **OK** or **OK & Next** to sign the document

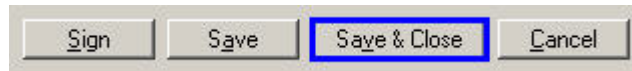
Note: OK & Next will sign the document and open the next document in your Inbox if you have more than one to sign. OK will sign the document and continue to display the signed document.



Sign Saved Documents from Your Inbox

Saved documents can be easily located by going to the **InBox** from the **Organizer Toolbar**. The **InBox** has four document folders, from top to bottom: **Anticipated**, **Sign**, **Review**, and **Saved**. All saved documents will appear in the **Saved** folder.

1. Find the document you want to sign in our **Inbox**
2. Double-click on the document in your **Inbox** to open it
3. Modify the document as needed (see *Modify Saved Documents from Your InBox*) and then click **Save & Close** to close the document and return to the **Sign and Review** window



Note: Save is like the auto-save function in Word. You may click it if you are concerned about losing documentation while you are in the progress of typing

4. Click **OK** or **OK & Next** to sign the document

Note: OK & Next will sign the document and open the next document in your InBox if you have more than one to sign. OK will sign the document and continue to display the signed document.

