

How to Record Field Medical Insights in ORBIT

Follow the steps below to add Field Insights to your medical interactions. The steps below also show how you can refer back to any stakeholder Field Insights when needed.

NOTES:

- Field Insights can only be recorded by ORBIT users who are call note enabled
- Within ORBIT, field Insights are displayed as **Medical Insights**
- Submitted Insights cannot be edited

1. Open ORBIT and go to your Stakeholder account. Then click on “Record a call”

The screenshot shows the ORBIT user interface for a stakeholder account named Susan Rosenblatt. The 'Record a Call' button is highlighted in a red box. The interface includes a top navigation bar with the ORBIT logo, a search bar, and various navigation links. Below the navigation bar, there is a section for the stakeholder's account details, including their name, account type, and various tabs like 'Details', 'Calls', 'Events', etc. The 'Record a Call' button is located in the top right corner of the account details section.

2. Complete your medical interaction as normal, but before submitting, go to the top right of the screen and select the “More Actions” button where you be able to select “Medical Insight”. Click on medical insight.

The screenshot shows the ORBIT user interface for a new medical interaction. The 'More Actions' button is highlighted in a red box. The interface includes a top navigation bar with the ORBIT logo, a search bar, and various navigation links. Below the navigation bar, there is a section for the new medical interaction, including fields for account, address, record type, channel, and initial interaction intent. The 'More Actions' button is located in the top right corner of the interaction form.

3. Now complete all the detail you wish to add, ensuring safety and compliance regulations are followed. You can also include web links and images. Be sure to note any connections with trials or other sources to close the loops. Once you have completed all the information, click submit.

New Medical Insight: Key Medical Insight

Information

Date: 15/02/2022

Owner: Ken Williams

Summary

Description

Sources

Account: Susan Rosenblatt

Interaction: C017932974

System Information

Medical Insight Name

Buttons: Cancel, Save & New, Save, **Submit**

4. Once you have submitted the Insight, the following screen becomes visible. You now need to click “Edit” to take you back to your medical interaction

ORBIT

Medical Interaction

Medical Interaction C017932971

Medical Interaction

Remote Meeting Schedule

Information

Calls within 2 Days	✓	Owner	Ken Williams
Account	Rosenblatt, Susan	Datetime	14/02/2022 11:24
Address	Lune Quays, Lancaster LA1 2AT	Duration	30
Record Type	Medical interaction	Appointment	<input type="checkbox"/>
Channel	Face to Face	Status	Saved
Initial Interaction Intent	Reactive	Event	
Engage Remote Meeting	<input type="checkbox"/>	Event / ANF	
Community Plan Tactic		Campaign	
KOL Tactic			

Comments

Comments

Last Medical Interaction Comments

Buttons: **Edit**, Delete, More Actions

5. Once you are back in your medical interaction, you can submit the call.

The screenshot shows the 'Medical Interaction' form in the ORBIT Core Lightning interface. The form is titled 'Medical Interaction' and has a sub-header 'Remote Meeting'. The 'Submit' button is highlighted with a red box. The form contains various fields for information, attendees, and actions.

Information

Calls within 2 Days	✓	Owner	Ken Williams
Account	Rosenblatt, Susan	Datetime	14/02/2022 [11:53]
Address	Lune Quays, Lancaster LA1 2AT	Duration	30
Record Type	Medical interaction	Appointment	<input type="checkbox"/>
Channel	Face to Face	Status	Saved
Initial Interaction Intent	Reactive	Event	
Community Plan Tactic		Event / ANF	
KOL Tactic		Campaign	

Attendees

<input type="checkbox"/> Grandier, Alexander Therapeutic Area 2, BridgeSide Hospital	<input type="checkbox"/> O'Neil, Shirley Therapeutic Area 2, BridgeSide Hospital	<input type="checkbox"/> Petit, Caroline Administration, BridgeSide Hospital
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6. You can now view all your Stakeholder Insights by going to the Account Information of that Stakeholder and clicking the “Medical Insights” related list.

The screenshot shows the 'Account Information' page for 'Susan Rosenblatt'. The 'Medical Insights' link is highlighted with a red box. The page displays various details about the account, including contact information, segmentation, and a list of related insights.

Account Information

Details

Name	Susan Rosenblatt	Specialty 1	Clinic Physician
UCB Salutation	Dear Ms.	Local Role Name 1	
Primary Parent	Therapeutic Area 2	Next Planned Call Date	08/10/2021, 09:34
Primary Grand Parent	BridgeSide Hospital	Last Submitted Call Date	18/05/2021, 14:26
Phone (Primary Member Of)		Last Submitted Call Owner	John Smith
Approved Mobile			
Last Medical Interaction Comments			

Stakeholder Segmentation

KOL	<input checked="" type="checkbox"/>	ROPE Advocacy	
MSL Relevant	<input checked="" type="checkbox"/>	ROPE Motivators	
Persona Segmentation			
CEI			
Independent DMC			

Consent Preview

Customised Email (N/A)

- ☐ Medical and Scientific Updates
- ☐ Webinars/CME Event Notifications
- ☐ Corporate Information
- ☐ Branded Product Information
- ☐ Surveys

Advance Budgetary Notification (N/A)

- ☐ Advance Budgetary Notification

Capture Consent

Please enter email to view Opt-in page QR Code & Link

7. When you open the Medical Insights related list, you can also submit a field insight that is unrelated to a medical interaction. (Insights are not always generated in a call, but sometimes via other sources). To do this, simply click on “New” and record the insight. Even here, you could link the insight to a previously submitted call if the insight became apparent once you have submitted the call.

The screenshot shows the 'Medical Insights' list in the ORBIT Core Lightning interface. The 'New' button is highlighted with a red box. The list displays two items, each with a 'Medical Insight Name', 'Interaction', 'Status', 'Summary', 'Created By', and 'Created Date'.

Medical Insights

Medical Insight Name	Interaction	Status	Summary	Created By	Created Date
1 KMI000000001	C017932971	Submitted	Excellent New insight	Ken Williams	14/02/2022, 11:39
2 KMI000000002		Submitted	Retro Insight	Ken Williams	14/02/2022, 12:01