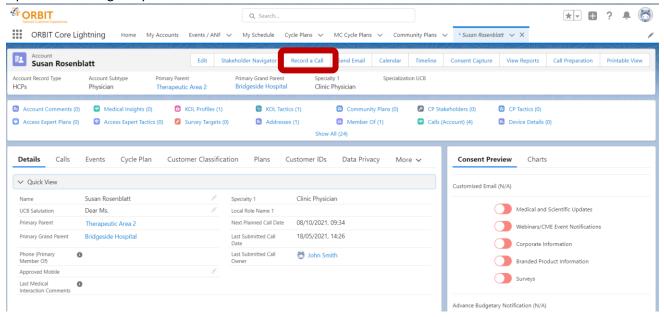
How to Record Field Medical Insights in ORBIT

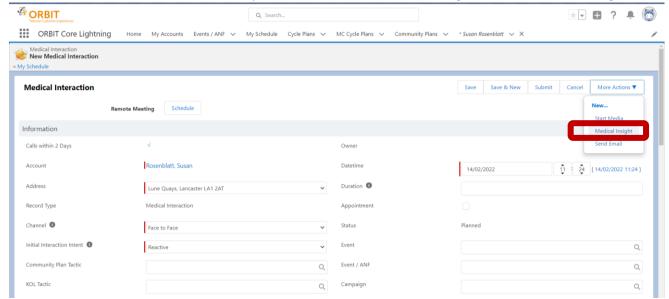
Follow the steps below to add Field Insights to your medical interactions. The steps below also show how you can refer back to any stakeholder Field Insights when needed.

NOTES:

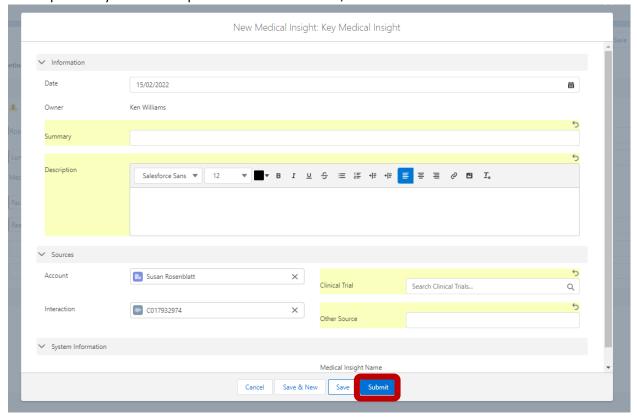
- Field Insights can only be recorded by ORBIT users who are call note enabled
- Within ORBIT, field Insights are displayed as Medical Insights
- Submitted Insights cannot be edited
- 1. Open ORBIT and go to your Stakeholder account. Then click on "Record a call"



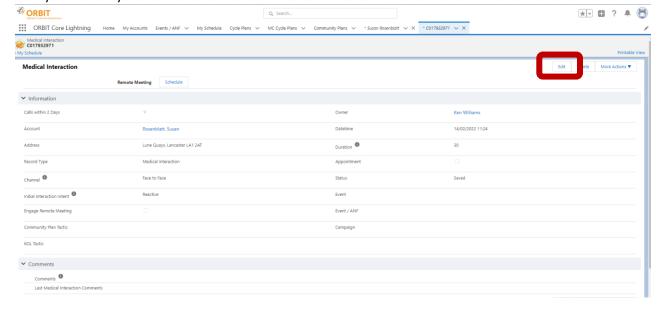
2. Complete your medical interaction as normal, but <u>before submitting</u>, go to the top right of the screen and select the "More Actions" button where you be able to select "Medical Insight". Click on medical insight.



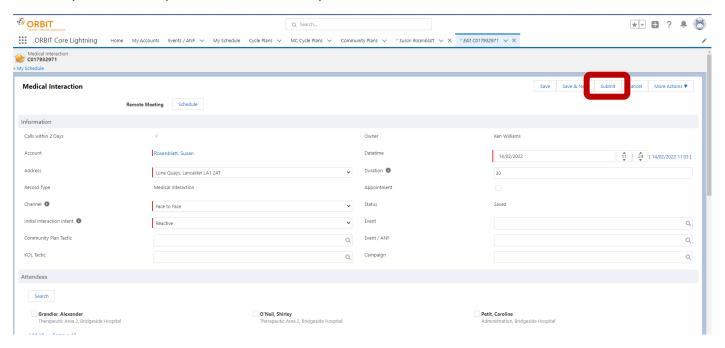
3. Now complete all the detail you wish to add, ensuring safety and compliance regulations are followed. You can also include web links and images. Be sure to note any connections with trials or other sources to close the loops. Once you have completed all the information, click submit.



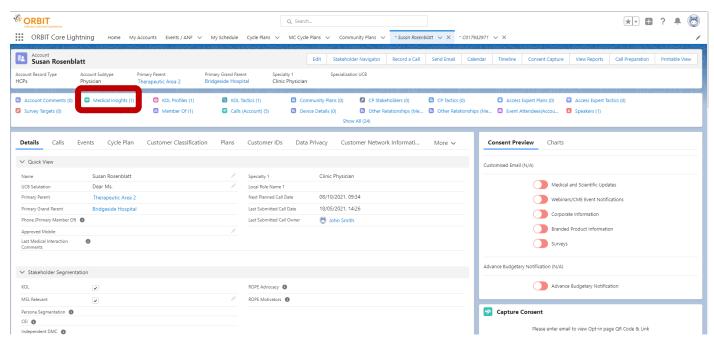
4. Once you have submitted the Insight, the following screen becomes visible. You now need to click "Edit" to take you back to your medical interaction



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



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.



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.

