How to Find Documents in EPIC via ORCA

Now that most surgery clinics have transitioned to EPIC (SCCA is a notable exception – they still chart in ORCA), there is considerable confusion about how to view documents in EPIC, especially when trying to do so via ORCA.

There are two ways to look at EPIC notes via ORCA. You can either click on ORCA/EpicCare Note, or click on EpicWeb.

If you click on ORCA/EpicCare Note, you will see something like this:

If you click on EpicWeb, you will enter EPIC in the SnapShot view:

To see the list of clinic notes click on “Chart Review” (see above red arrow).
Below is what the Chart Review option looks like (list of available documents). Unlike ORCA/EpicCare Notes, EpicWeb also permits you to view any documents that have been scanned into EPIC.

Any note that has a scanned document attached will have a paper clip icon. This could be anything - a health care directive, outside clinic notes, lab work or medical test results. But if you click on the Media tab (see red arrow above), you will now see a list of all notes with attachments and usually a description of what the attachment is:

Clicking on the date of the document you wish to examine (above, in this case the one with the red arrow) brings up a view of the following:

Clicking on the scan file link (above red arrow) will open the document.
You will want to use the ORCA/EpicCare Note option whenever you open EpicWeb and find that the note you want to look at has the status of “Open” instead of “Closed”. See below for examples of Open and Closed notes.

When you look at a note via EpicWeb that is “Open”, you will only see some basic demographic information. But if you open that same note via ORCA/EpicCare Note, you will see the entire note.

Lastly, you should be aware of some of the advantages of looking at the electronic yellow packet. It may help you be aware of and find pertinent documents such as the surgical history and physical, or important medical test results.

First, you have to be able to get into it. Start with Chart Summary. You may see something like this:

You have to click on “more” to find the Surgery Yellow Packet option:

Once selected, you may wish to “Set current view as Default” so that you will automatically view the yellow packet whenever you click on Chart Summary.

The home page of the Surgery Yellow Packet looks like this:

Click on the YP Status status to open the yellow packet and the top will look like this:
If you scroll down, additional information will be visible:

“Bypass Documents” may list pertinent documents if a request had been made to not require the patient to visit the preop clinic. Similarly, pertinent documents may be found in the “Assessments” section, and the surgical H&P should be listed in the “History and Physical” section.