

Complete Patient Record. Complete Patient Care.



## THC: In Basket

**In Basket** is Epic's communication hub, where you can send and receive messages and work through tasks. You can quickly complete your tasks by marking a message as **Done** or by following up in other ways.

**In Basket** messages can be sent to individual recipients and to groups of recipients. Some messages are automatically sent to the **In Basket** when certain events occur. For example, you might receive a message when the results of a lab test come back or when someone places an order that requires your signature.

There are multiple ways to access the **In Basket** within Epic. This tab can be located at the top left just under the **Epic** button.

OR it can be found in the upper right-hand corner of your screen and look something like this:

|--|

The **In Basket** tab has a toolbar across the top and folders listed on the left side under **My Messages.** If a folder is **bold** in color, it contains a new item that has not been viewed.

								In Pecket tool ber	EpicCare
Home 📿 Refresh 🖾	New M	essage 🛯 🖆 New Patient Me	ssage 🍰 Manage Pools	🚮 My Pools 🎾 Search	유 Attach 📩 Out of Contact 🏓 Preferences Manage Quick	Actions 👻 🖓		contains actions fo	r 🔨 🕐 א
🖼 My Messages		∧ New	New High Priority	Total	해 Pools I'm Signed Into	Sign In/Out	♀ Did You Know	users	🗙 Dismiss
Help Desk	2/5	172	0	306	Pool	Messages			
CC'd Chart	0/1	Covoring Usors			HELP DESK POOL	75/128		×	
Charts	28/32	Covering osers			CLINICAL (PC FIVE MILE)	21/29	•	One and Done	•
Cosign - Clinic Orders	9/10	Person	Start	End Messages	BEITER, P (PCP)	7/20	Done, Revi	ewed, and Complete are not one button:	Done.
E-Consult	0/4	Woods, Cyd, Registered I	Nurse 10/03/18	10/03/27 5/6	CLINICAL (PC NORTHCREEK)	5/39			
E-Visits	0/2	O All Covering O High P	riority Covering O Last 7 Days	O New Covering Search	TH MYCHART E-VISITS	0/0			
Hospital Chart Completion	1/-				•			Check o	utnew
Letter Queue	3/3	Attached Lleave					P Saved Searche	s teatu	ires
Medication Cancellation	0/2	Attached Users		Attach	T T		Care Managers: Cond	lition Code 44 In Basket Messages (All Status	es Last 7
My Incomplete Notes	4/6	Person		Messages			Days)		
My Open Encounters	10/14	Beiter, Patrick, MD		t 233/302			Care Managers: Cond 60 Days)	lition Code 44 In Basket Messages (Done Stat	us, Last
My Unsigned Orders	0/1				Power on the Home cor	0.010	Done'd Messages		
MyChart Administration	5/5	In Bas	ket folders are	<b>_</b>	Boxes on the Home sch	een	Patient Accounting: D	one'd ADT Order Messages	
Orders	1/4	lieto	d on the left		give general information	on.	Pafil Paguasts Comp	lated	
Overdue Results	23/24	liste	a on the left.				Paell Paguests Comp	10100	
Patient Call	1/7						Renn Requests Pendi	"9	

Send a message to a colleague, your RN/MA, a nurse pool, or any Team Member:

1) Click the New Msg button on the In Basket toolbar



- 2) Enter recipient: Individual or Pool
  - a. Use the magnifying glass to search for recipients
  - b. When adding a Pool, type a "P" space and then the first few letters of the pool.
- 3) Attach a patient's chart A Staff Message does NOT get saved to the patient's chart.
- 4) Enter your message pull in a **SmartPhrase** or free type

Staff Message			
0	t High ↓ Low	Call Info	
Enter recipients	a o cc	Phone Number	Call Me
Pool for Responses: Add a pool	0		
Subject		Flags	*
Patient 3	O Current Patient	Call with results	~
		Call patient	
		Patient reminder	
		Write letter	
		Personal reminder	
		Provider Action	•
		Dates	*
		Delay sending until	
		Date 📩	Time (1)
		Due on	
		Date 📋	Time 🕘
	Check out special	Expire on (j)	
	features under Elags	11/16/2022	4:19 PM ④
	reatures under Plays		
	and Dates		
		Sand	Capaci
Save as <u>u</u> ulckAction		<u>s</u> ena	<u>C</u> ancei

## Addressing In Basket folders:

- 1) Click the folder you're ready to address
- 2) All messages in that folder will be listed, click the message to open/view it. **Note:** There is a difference between a double click and single click
- 3) Single click will open the item either to the right side or below-user can set this as a preference with wrench. Actions are located above the message.
- 4) Tabs are available to view additional patient information.
- 5) Each folder has a "Sort & Filter" drop down and a wrench where users can customize.

In Basket				
← → 🏠 Home 📿 Refresh 🖾 Nev	wessage 👻 🖻 New Patient Message 👻 📩 Manage Pools 🙀 My Pools 🔎 Search 🚆 Attach 🛱 Out of Contact 🛛 🌶 Preferences 💉 Manage Ou	ickActions - ♀ Available actions for		
🖴 My Messages	· · · · · · · · · · · · · · · · · · ·	the message.		
Help Desk 2/5	Done Reply Reply All Forward Follow-up Chart Encounter Ngle Msg to Pt Letter Sign Encounter Dial	New QuickAction		
CC'd Chart 0/1	Patient Call 2 new, 8 total All Sort - Filter -	ast Note Meds/Problems He 4		
Charts 29/33	T Status Comment Date and Time Patient	← → C → Done to the at a log Patient Info		
Cosign - Clinic Orders 10/11	New This is my c 7/24/2020 10:14 Zztest, Amb Judy "Judy"			
E-Consult 0/4	Reason for Call:	🖾 Message		
E-Visits 0/2	Prov: Steffen, Lori Pool?: X Pool Name: Clinical (Pc Northcreek) Female, 56 year old, 6/8/1966			
Hospital Chart Completion 1/2	Ref: Last: TEST, AMBMD Sent by: Steffen, Lori Ann Weight: 150 lb (68 kg)	Caller: Unspecified (1 year ago)		
Letter Queue 2/2	PCP: MENA, ANGEL JAVIER Phone: 513-487-9700 (M) Peed Tbic is my co. 2/04/20 Needs Interpreter: Language:			
Medication Click on the	Reason for Call: All messages are listed, click Spanish	Previous Messages		
<sup>My Incom</sup> folder you	Reason for Call Comment: the one you'd like to view.			
My Open with to view	Ref: Last: TEST, AMBMD Double click to go straight to Confidential Patient: None	🗣 Form		
My Unsign	PCP: MEN_ANGEL JAVIER the Encounter. Allergies: No Known Allergies			
MyChart Administration 4/4	Read 4/13/202 Beason for Call: Form	Steffen, Lori Ann routed conversation to Beiter, P (Pcp); Clinica		
Orders 1/4	Reason for Call Commentary PCP: Beiter, Patrick A, MD	Steffen, Lori Ann 🔿 Merling, Jeffrey W., MD		
Overd Results 23/24	Prov: Beiter, Patrick A., MD Pool?: X Pool Name: Clinical (Pc Northcreek) Coverage: None Ref: Last: STEFEEN LORIANN Sent by: Steffen Lori Ann			
Patient Call 2/8	PCP: BEITER, PATRICK A.	LC Spoke to patient wants new medication		
Patient Clinical Update 5/6	Pend 4/13/2021 12:10 Ztest. Elizabeth "Elzbth"	Lo spoke to patient wants new medication.		

Once a message is open:

- 1) Frequently used icons will remain on the top left for each folder.
- 2) **QuickActions** for the folder will be visible on the top right depending on how many there are. Look under More if you don't see what you're looking for.



Folders have different task buttons available at the top, depending on folder type. There are more In Basket efficiency tips located in the **Learning Home Dashboard**. This can be viewed by pressing the F1 button on your keyboard.

## In Basket tips are under Outpatient Guides and Here's How Videos.

If you are a member of a **Pool**, when you open a message that has been sent to the **Pool**, you will see a question mark and baton icon to the left of the message, just under where it says "**New**" or "**Read**." If you are assuming responsibility for the message, click the icon (**Take baton**) and the question mark will then turn into a plus sign.



When the plus sign appears, it means you have assumed responsibility for the message. To put it back, click the plus sign again and it will turn back into a question mark.



When viewing the message and there is a minus sign, hover and it will tell you who is working on that message. You can click the minus sign and take responsibility for the message if needed.

Pand				A	01/05/20	)21
😤 New	1	Resulted: Final result				
Poor	: X			Poo	I Name:	He
Take th	e bator	n from Veram	ıbmd, T	est,	MD (Ctrl+	B)

Once the user who is handling the message signs the **Encounter** or "**Dones**" the message, it will disappear from all other pool members' **In Baskets**.

Users can **Filter** to see messages more efficiently. Filters can be viewed on the right before opening any messages in a folder, or in the Filter drop down.

When working in a **Pool**, consider using the "**Not Taken By Others**" filter to prevent scrolling through all messages.



Icons are present to denote if a **Reply** or **Forward** message will be saved to the chart. When the disk icon appears below the arrow, the message will be saved to the chart. When it is absent, the message will NOT be saved to the chart.

There is not a change in the behavior of messages, just an added icon to inform the users.

