

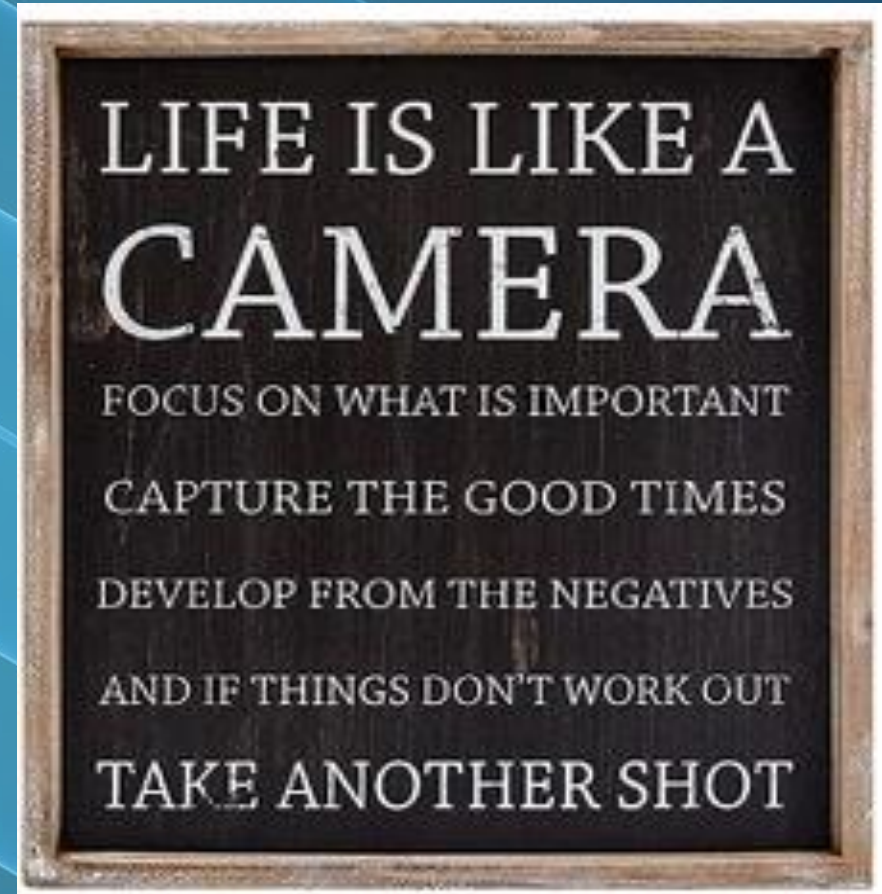
NEW TOOLS IN YOUR IN BASKET



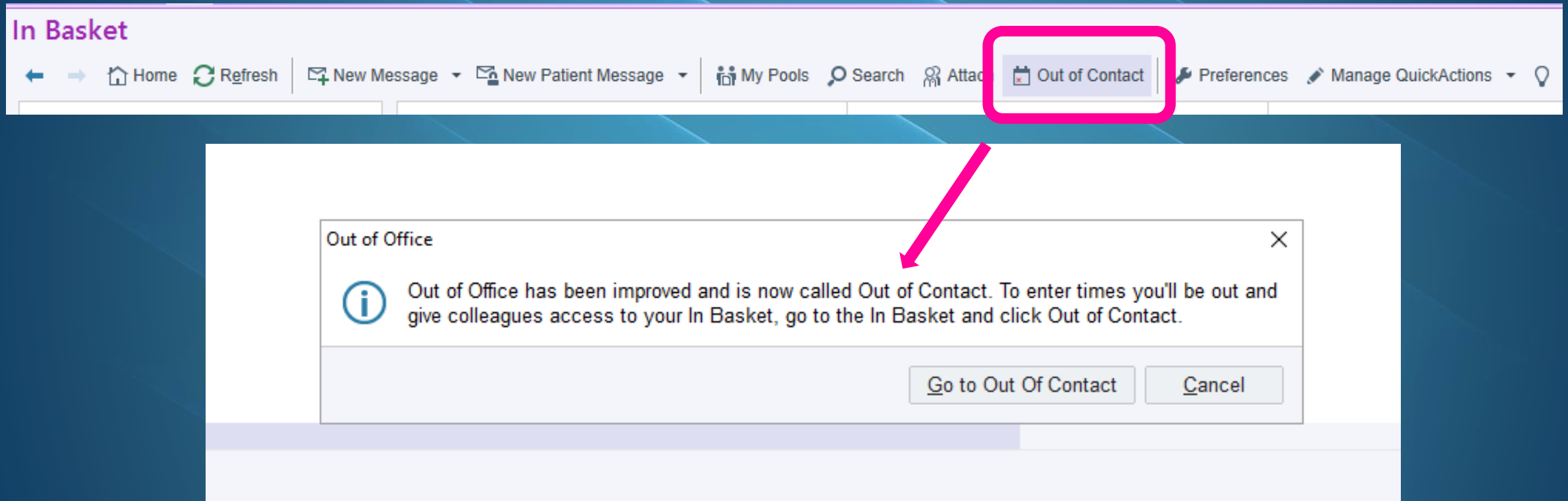
Lisa Heaton, BSN, BA, MHI, RN
Clinical Informatics Consultant

Beth Patel
Principle IS Ambulatory Trainer

Reflection



OUT OF CONTACT (OOC) OFFICIALLY REPLACES OUT OF OFFICE (OOO)



In Basket

← → Home Refresh New Message New Patient Message My Pools Search Attach **Out of Contact** Preferences Manage QuickActions

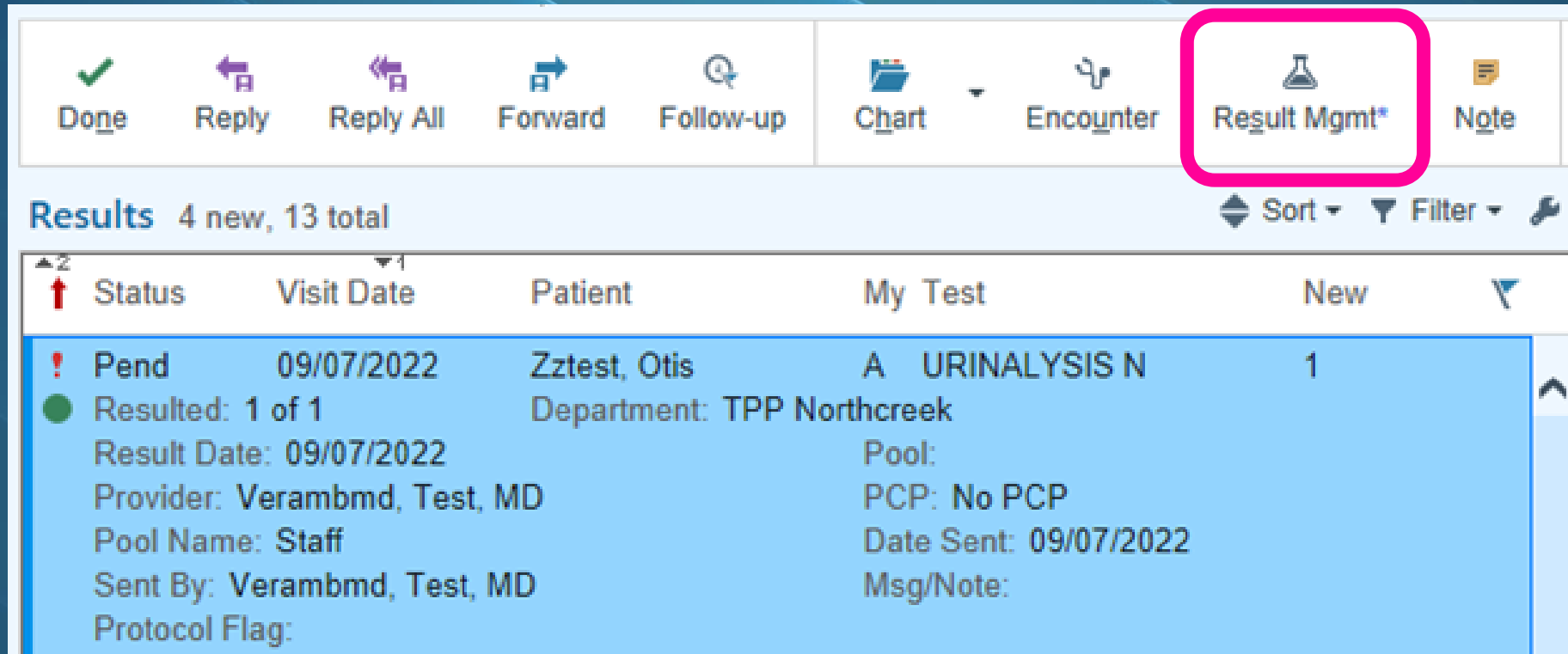
Out of Office [X]

i Out of Office has been improved and is now called Out of Contact. To enter times you'll be out and give colleagues access to your In Basket, go to the In Basket and click Out of Contact.

Go to Out Of Contact Cancel

The OOO utility is now removed completely in favor of In Basket's OOC activity, Epic's recommended tool for covering In Basket outages.

RESULT NOTE IS NOW “RESULT MANAGEMENT”



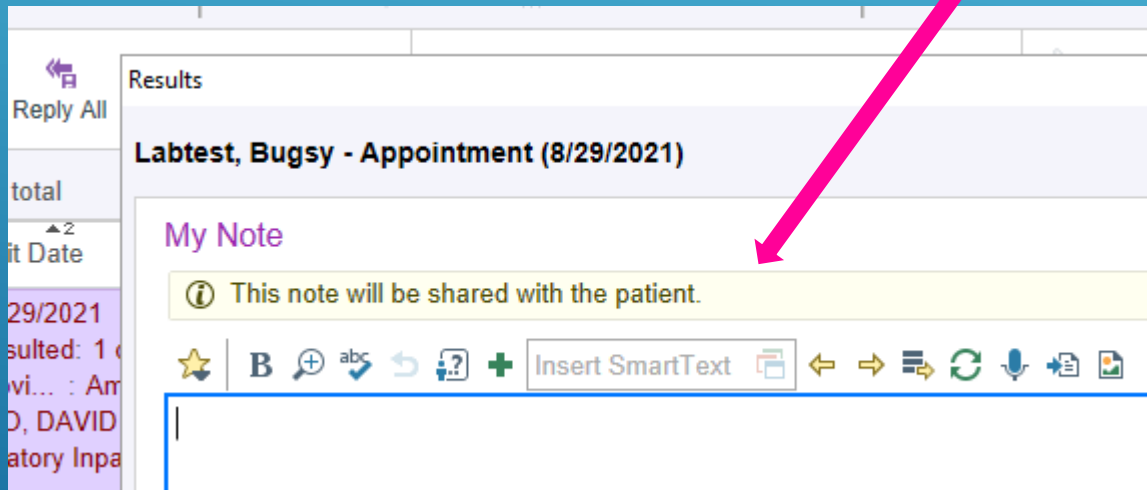
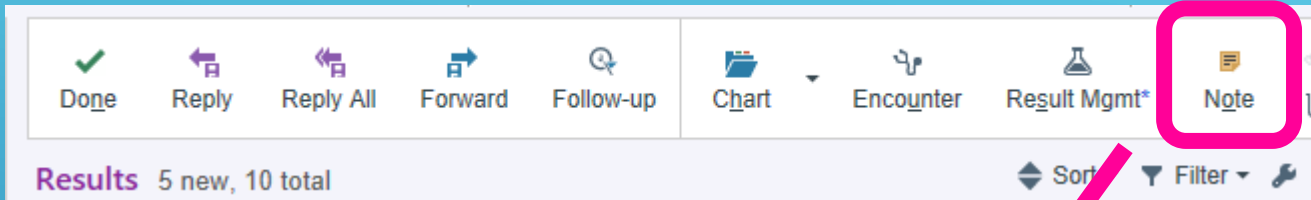
The screenshot displays a software interface with a toolbar at the top and a results table below. The toolbar contains several icons and labels: Done (checkmark), Reply (reply icon), Reply All (reply all icon), Forward (forward icon), Follow-up (follow-up icon), Chart (chart icon), Encounter (encounter icon), **Result Mgmt*** (flask icon, highlighted with a pink box), and Note (note icon). Below the toolbar, the text "Results 4 new, 13 total" is displayed, along with "Sort" and "Filter" options. The results table has columns for Status, Visit Date, Patient, My Test, and New. The first row shows a pending result for "Zztest, Otis" with a test name "A URINALYSIS N" and a count of "1".

| Status | Visit Date | Patient | My Test | New |
|--------|------------|--------------|----------------|-----|
| ! Pend | 09/07/2022 | Zztest, Otis | A URINALYSIS N | 1 |

Additional details for the pending result:

- Resulted: 1 of 1
- Department: TPP Northcreek
- Result Date: 09/07/2022
- Pool:
- Provider: Verambmd, Test, MD
- PCP: No PCP
- Pool Name: Staff
- Date Sent: 09/07/2022
- Sent By: Verambmd, Test, MD
- Msg/Note:
- Protocol Flag:

Result Note command button is now called Result Mgmt, and Result Note QuickActions are now called Result Management QuickActions.



Note icon next to the Result Management icon (button) in the In Basket is used for Quick Notes NOT Result Notes.

This Quick Note will file to the patient's chart.

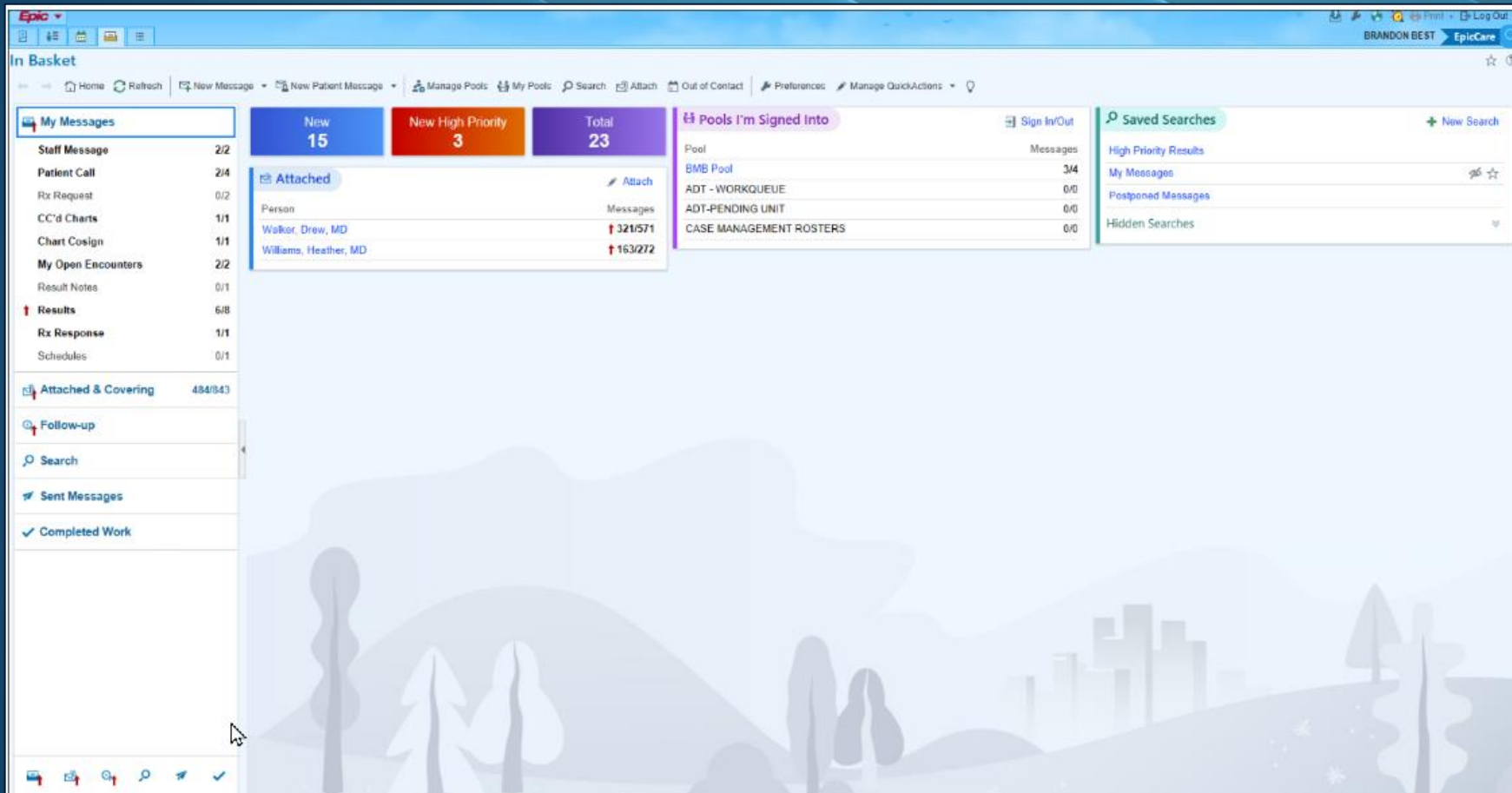
PATIENT RX REQUEST AND RX REQUEST FOLDERS WILL BE MERGING TO FORM ONE “RX REQUEST” FOLDER

| | |
|------------------------------|-------------|
| Pt Questionnaires | 37/64 |
| Pt Reminder | 0/2 |
| Pt Rx Request | 0/7 |
| Pt Schedule Request | 0/9 |
| Referral Notification Letter | 0/1 |
| Result Notes | 2/7 |
| Results | 4/12 |
| Rx Request | 0/8 |
| Staff Message | 1/2 |

| Rx Request 0 new, 8 total | | | |
|---|--------------------|---|------------------------------|
| Status | Date/Time | Patient | Medication |
| Read | 7/5/2018 11:43 AM | Pbtestaetna, Robyn | lansoprazole (PREVACID) 1... |
| Pharmacy: Patient-entered | | | |
| Provi... : Demarco, David John,... | | Department: TPP Northcreek | |
| Sent By: Mychart, Generic | | Open?: Open | Pool: X |
| Rx Source: MyChart | | PCP: DEMARCO, DAVID JOHN | |
| Read | 10/19/2021 9:50 AM | Dexter, Alexa | 2 Rx Requests |
| P... : KROGER CINCINNATI 421 - MARIEMONT, OH - 738... | | | |
| Provider: Beiter, Patrick A., MD | | Department: GH Anderson Internal Medicine | |
| L... : WESTER, THOMAS E JR. | | Pool: | |
| Sent By: Verambmd, Test, MD | | Open?: Open | PCP: VERAMBMD, TEST |
| Rx Source: Telephone | | Comment: | |

Both MyChart Rx Requests and Refill Requests will merge and appear in the same folder – RX REQUEST

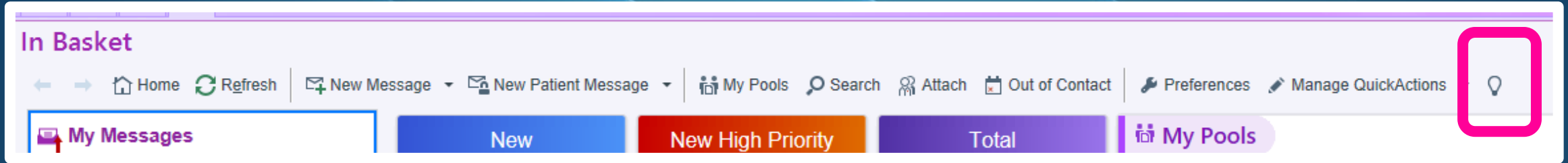
SIMPLER, SLEEKER DESIGN FOR HOME AND FOLDER SCREENS



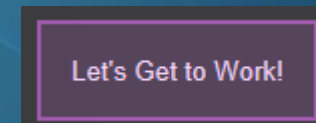
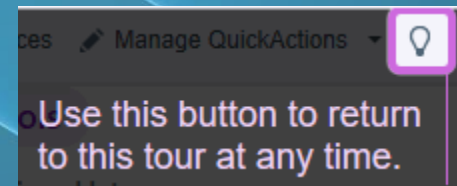
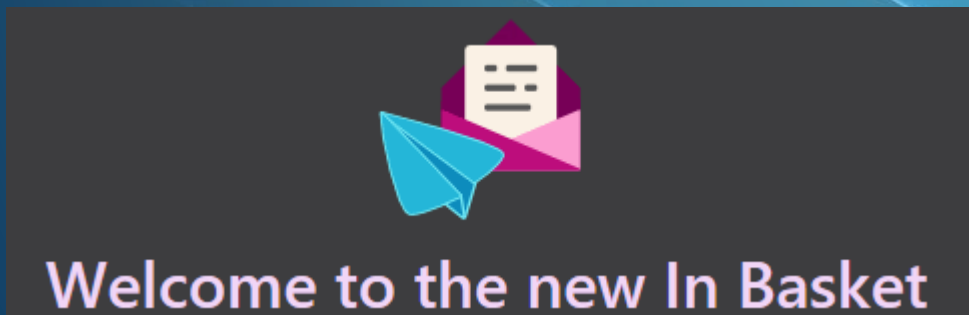
The new In Basket has new features to help you organize your work, review messages, and care for patients.

- ▶ Filter folders to find the exact messages
- ▶ Use new Reply and Forward QuickActions to instantly send a fully written response without opening the message form.
- ▶ An updated home screen tells you how many messages you have, and where to go to complete them.

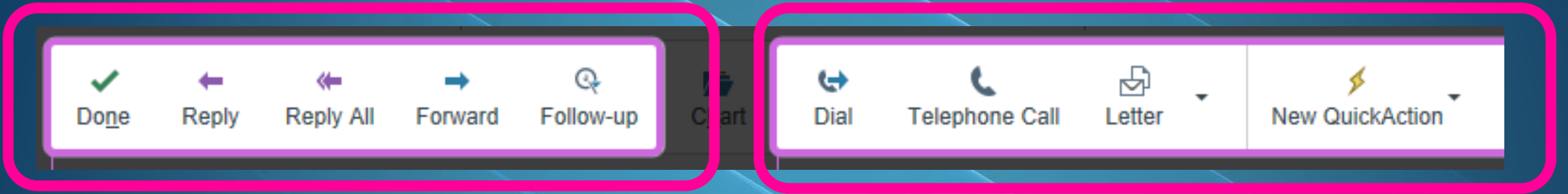
TAKE THE TOUR OF THE NEW IN BASKET FEATURES/CHANGES



In Basket's new look and features simplify and speed up task management. Take a minute to go on a tour of the changes before you get started. Click on the light bulb for the tour.



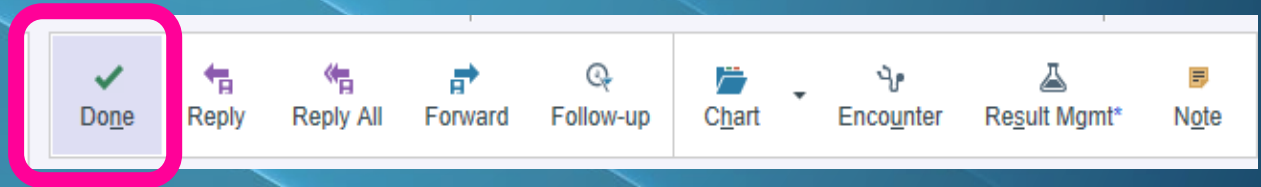
TAKE ACTION:



A

B

C



The toolbar has been updated to give you quicker access to all the buttons you need.

SEARCH FOR TASKS:

In Basket

← → Home Refresh New M

| | |
|----------------------------------|--------------|
| Cosign - Clinic Orders | 0/1 |
| Hospital Chart Completion | 5/5 |
| Letter Queue | 2/2 |
| My Incomplete Notes | 0/2 |
| My Open Encounters | 24/38 |
| Notes Message Routing | 0/1 |
| Overdue Results | 46/47 |
| Patient Call | 0/1 |
| ↑ Results | 5/10 |

Attached & Covering Us... ✎
No attached users

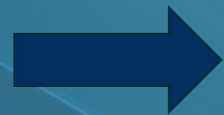
Follow-up

Search +

Patient
Enter name or MRN 🔍

My New Messages
Run at 1:07:09 PM

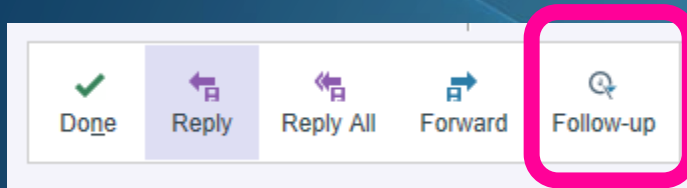
Quickly search for all tasks you have for a patient, or start an advanced search for more options.



Search +

Patient
Enter name or MRN 🔍

USE FOLLOW-UP TO FIND FLAGGED AND POSTPONED MESSAGES



Follow-up

Comment ⓘ

⊕ ↶ ↷ ? ?+ 📄 ⬅ ➡ ⬅ ➡ 100%

Postpone ⓘ

Tomorrow 1 Week

Until: Date

| ◀ Apr ▶ ◀ 2022 ▶ | | | | | | |
|--------------------|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| 27 | 28 | 29 | 30 | 31 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Due By

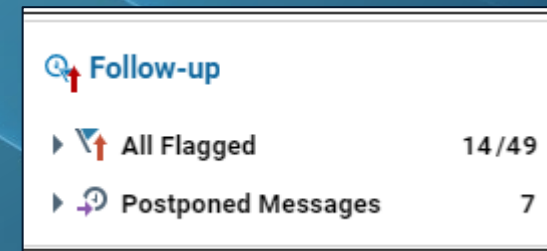
Date Time

Flags

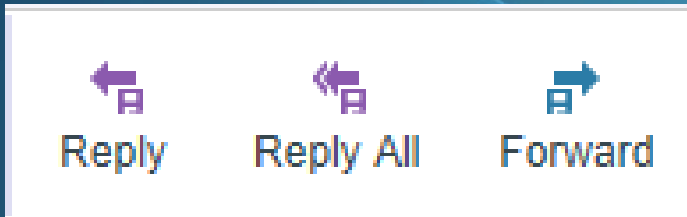
- Call patient
- Call with results
- Left Msg to Call Back
- Patient reminder
- Personal reminder
- Schedule follow-up appointment

Accept Cancel

- ▶ Keep track of the messages you need to follow-up on in the Follow-up section- flagged or postponed/set to send at a later date
- ▶ Use the **Follow-up** command button to apply flags, postpone messages, or add comments
- ▶ The Comment command button has been removed
- ▶ Flagged messages still appear in My Messages, but postponed messages do not



SAVE REPLIES AND FORWARDS TO PATIENT CHARTS

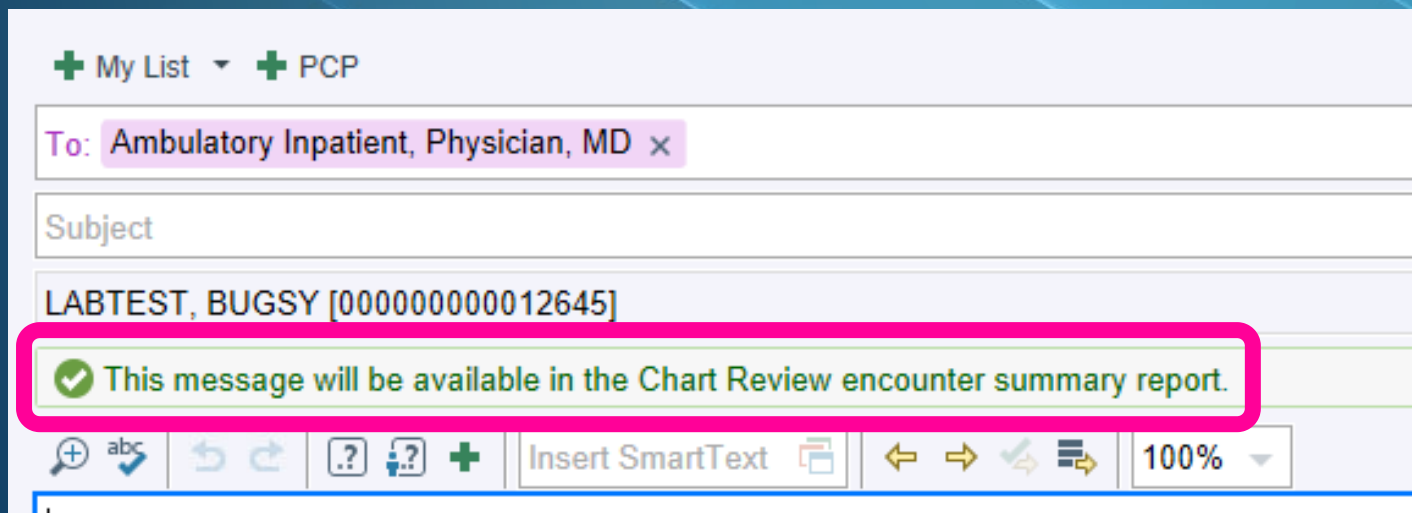


Now find relevant In Basket messages in the associated patient's chart

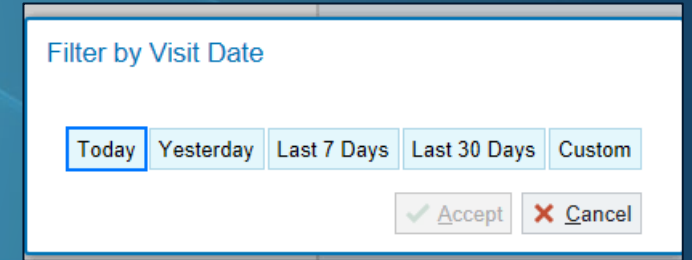
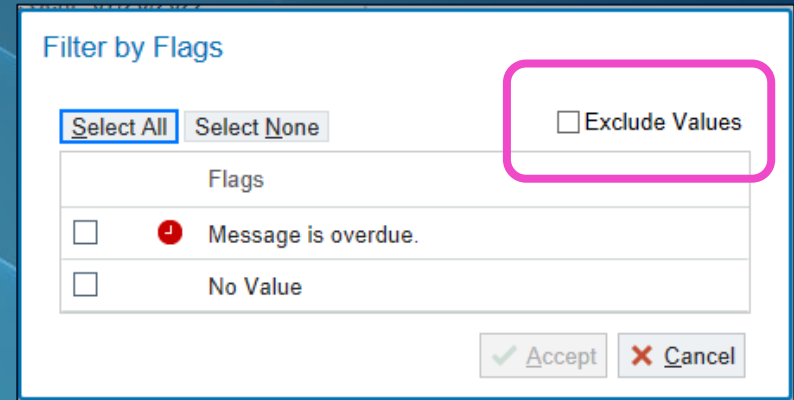
Use the **Reply** and **Forward** buttons **w/floppy disk icons** to automatically save the message to the encounter summary report

FILING TO PATIENT CHART:

Results



USE ADVANCED FILTERS TO FIND MESSAGES



My Messages

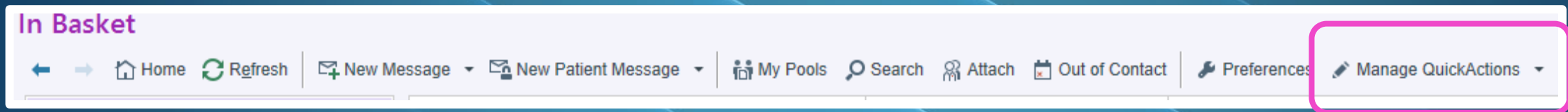
- BestPractice 1/1
- CC'd Charts 0/2
- Chart Completion 0/1
- Cosign Notes 1/1
- E-Prescribing Errors 5/9
- Letter Queue 1/1
- Medication Cancellation 0/4
- My Open Charts 9/9
- My Open Encounters 1/1
- Patient Questionnaires 90/106
- Pt Advice Request 11/20**
- Pt Non-Clinical Update 1/7
- Pt Schedule Request 19/19
- Research Recruitment 0/1
- Staff Message 2/7

Pt Advice Request 11 new, 20 total

| Status | Msg Date | Msg Time | Patient |
|-----------------------------------|------------|-----------------------------------|-------------------------------|
| Read | 03/03/2022 | 6:48 AM | Maue, Streak [112872] |
| Subject: Questionnaire Submission | | | |
| Phone: | | Provider: No Provider Specified | |
| Pool: YES | | | |
| Read | 03/03/2022 | 7:40 AM | Maue, Streak [112872] |
| Subject: Questionnaire Submission | | | |
| Phone: | | Provider: No Provider Specified | |
| Pool: YES | | | |
| Read | 03/03/2022 | 8:24 AM | Kloepper, Washington [113609] |
| Subject: Questionnaire Submission | | | |
| Phone: | | Provider: Kloepper, Inpatient, MD | |
| Pool: YES | | | |
| Read | 03/03/2022 | 8:25 AM | Kloepper, Washington [113609] |
| Subject: Questionnaire Submission | | | |
| Phone: | | Provider: Kloepper, Inpatient, MD | |
| Pool: YES | | | |

Narrow down your task list using **Sort** and **Filter** options. Use pre-defined filters or create your own through the **Filter By Value** option.

STREAMLINE REPLYING AND FORWARDING USING QUICKACTIONS

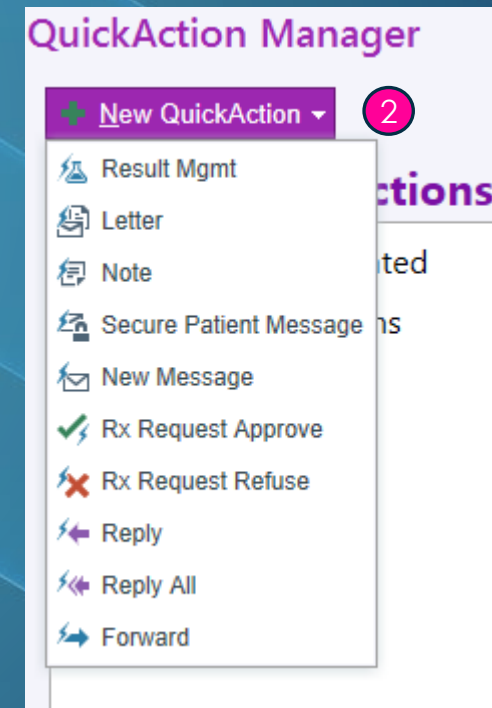


Create a reply or forward QuickAction so frequent similar content and intent messages can automatically pull information into your reply or forward message.

Save it so it appears in your message toolbar, where you can click it to reply or forward with the information in the QuickAction.

Set QuickActions to pull in recipients, the subject line, message text, flags, and more, depending on the message type used.

With the **Show Message Before Sending** setting, control whether the message form opens before the message is sent to review content and add information as needed.



STREAMLINE REPLYING AND FORWARDING USING QUICKACTIONS

Reply QuickAction Editor

General

QuickAction Name 3

Use for: 5 All available message types

Message Type 5

staff |

| Message Type | ID |
|---------------|----|
| Staff Message | 1 |

Show message before sending 4

Reply QuickAction

High Low Source

Type

Reply Reply All Forward 6

+ PCP

Sender 8

Pool for Responses: Add a pool

Subject 9

Do not include PHI or patient-specific data in QuickActions.

abc ? ? + Insert SmartText Insert SmartList

100%

Enter documentation of message in this area 10

Call Options

Phone Number Call Me

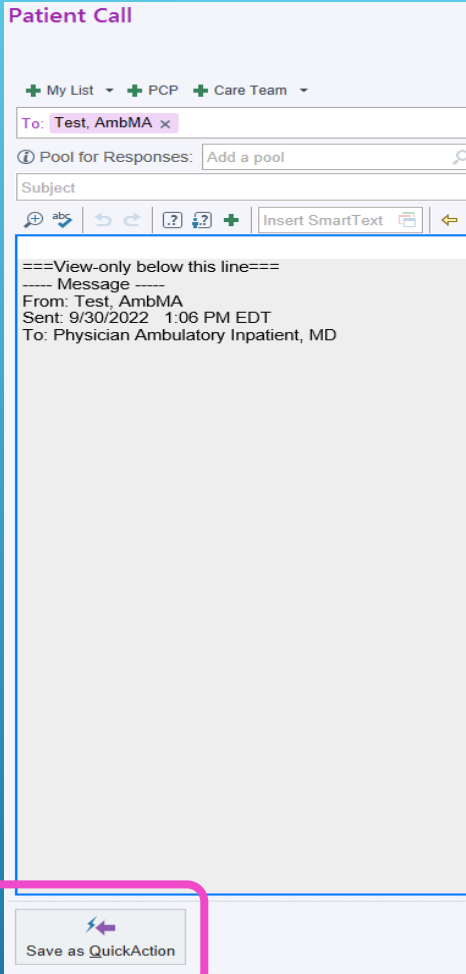
Flags 11

- Call patient
- Call with results
- Communicate to Patient
- Patient reminder
- Personal reminder
- Provider Action
- Schedule follow-up appointment
- Write letter

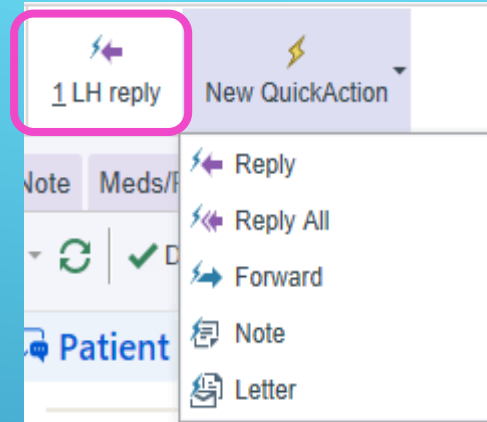
Dates

Delay sending until

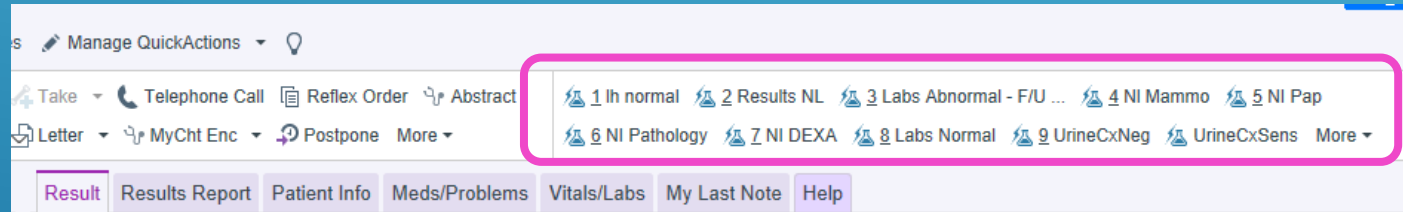
Date Time



Message QuickActions



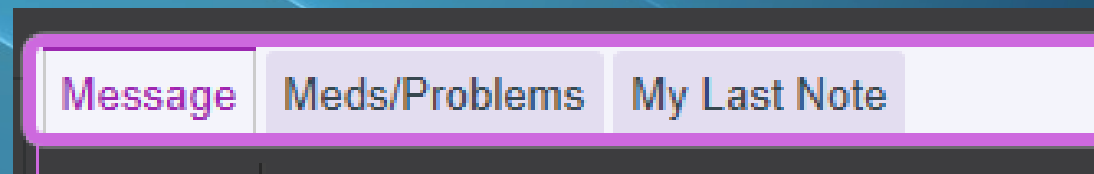
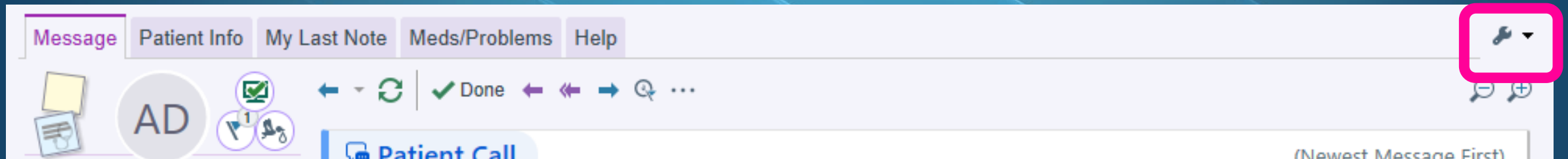
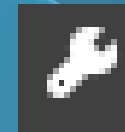
Result QuickActions



Create a new QuickAction based on Reply or Forward messages while in the process of writing

ORGANIZE THE IN BASKET:

Use wrench buttons to organize the In Basket the way you want it.



PERSONALIZE YOUR MESSAGE TOOLBAR

| | |
|----------------|------------|
| Phone Calls | 0/18 |
| Pt Call Back | 9/9 |
| Pt Reminder | 3/4 |
| Pt Rx Request | 2/2 |
| Result Notes | 1/3 |
| Results | 4/6 |
| Rx Response | 1/1 |

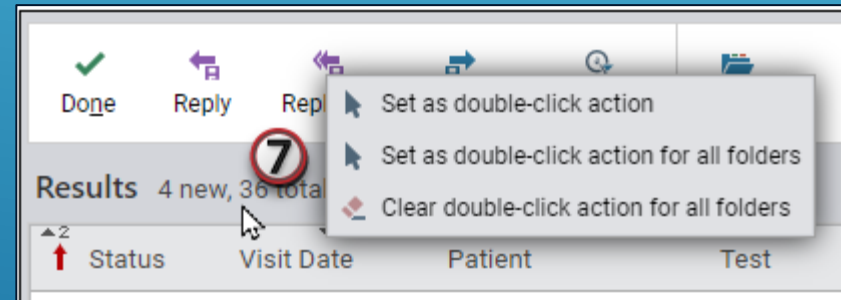
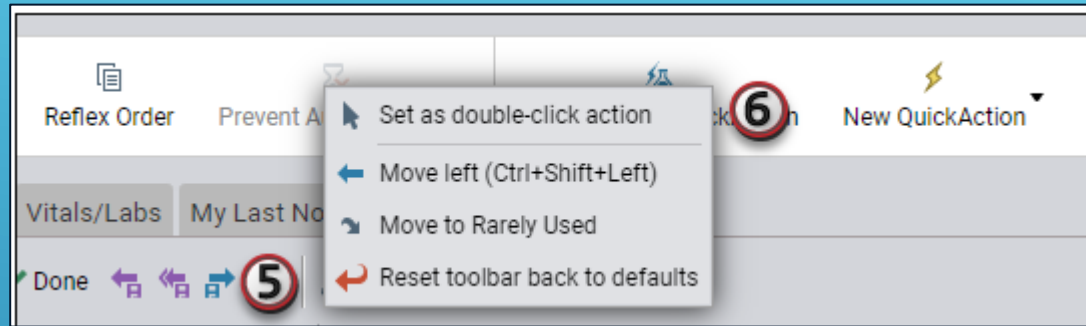
The screenshot shows a medical message interface. The left sidebar contains a list of folders: Phone Calls (0/18), Pt Call Back (9/9), Pt Reminder (3/4), Pt Rx Request (2/2), Result Notes (1/3), Results (4/6), and Rx Response (1/1). The 'Results' folder is highlighted and marked with a red circle containing the number 1. The main toolbar contains buttons for 'Take', 'Release', 'Lab Flowsheet', 'Telephone Call', and 'Rarely Used'. The 'Lab Flowsheet' button is marked with a red circle containing the number 2. A 'Move to Rarely Used' dialog box is open over the 'Rarely Used' button, marked with a red circle containing the number 3. The 'Rarely Used' button is marked with a red circle containing the number 4. The background shows a message for 'Jules W' with details like 'Female, 3' and 'MRN:'.

Prioritize the space and buttons used most by personalizing your message toolbar.

The toolbar is broken up into four sections:

- ▶ first two sections contain standard In Basket commands
- ▶ third section contains folder-specific commands
- ▶ fourth section contains QuickActions.

Personalization toolbar options differ depending on which section you are trying to change.



NAVIGATE USING KEYBOARD SHORTCUTS

Message Patient Info My Last Note Meds/Problems **Help**

AD

Alexa Dexter "Poor Baby"

Male 31 year old, 9/28/1991

Weight: 160 lb (72.6 kg)

Phone: 513-246-4907 (H)

Needs Interpreter: None

PDMP Reviewed: No

Shortcuts

| Frequent Actions | | Actions Bar | |
|---------------------|--------------|-------------|---|
| Refresh In Basket | F5 | Done | Ctrl+Alt+3, then N or Alt+Shift+N or Delete |
| New Patient Message | Ctrl+Shift+M | Reply | Ctrl+Alt+3, then R or Ctrl+R |
| Done | Delete | Reply All | Ctrl+Alt+3, then L or Ctrl+Shift+R |
| Reply | Ctrl+R | | |
| Reply All | Ctrl+Shift+R | | |
| Forward | Ctrl+F | | |

Find and use keyboard shortcuts more efficiently with a dynamic new keyboard overlay in In Basket.

To see all available keyboard shortcuts, press Ctrl+Alt+?. To use the two-character shortcuts, you need to press the characters sequentially.

Refer to the Help report for a list of all available keyboard shortcuts found at the top of any selected message in In Basket.

Shortcuts

| | | | |
|-------------------------|------------------------|-------------------------------|---|
| Frequent Actions | | Actions Bar | |
| Refresh In Basket | F5 | Done | Ctrl+Alt+3, then N or Alt+Shift+N or Delete |
| New Patient Message | Ctrl+Shift+M | Reply | Ctrl+Alt+3, then R or Ctrl+R |
| Done | Delete | Reply All | Ctrl+Alt+3, then L or Ctrl+Shift+R |
| Reply | Ctrl+R | Forward | Ctrl+Alt+3, then F or Ctrl+F |
| Reply All | Ctrl+Shift+R | Follow-up | Ctrl+Alt+3, then P or Ctrl+Shift+U |
| Forward | Ctrl+F | Chart | Ctrl+Alt+3, then C or Alt+H |
| Chart | Alt+H | Encounter | Ctrl+Alt+3, then E or Alt+U |
| Encounter | Alt+U | Result Mgmt | Ctrl+Alt+3, then S or Alt+S |
| Result Mgmt | Alt+S | Note | Ctrl+Alt+3, then O or Alt+O or Ctrl+Shift+N |
| Mark as New | Ctrl+Shift+K | First nine folder actions | Ctrl+Alt+3, then 1-9 |
| Mark as Read | Ctrl+Shift+D | Remove | Ctrl+Alt+3, then X |
| Note | Alt+O | Launch Remote | Ctrl+Alt+3, then T |
| | | Move to My Messages | Ctrl+Alt+3, then M |
| | | Clear All Flags | Ctrl+Alt+3, then G |
| | | Take/put back baton | Ctrl+B |
| | | First nine QuickActions | Ctrl+Alt+4, then 1-9 or Alt+Shift+1-9 |
| Modes | | Navigating to Sections | |
| All shortcuts | Ctrl+Alt+Question Mark | My Messages | Ctrl+Alt+5, then 1 |
| Moving focus | Ctrl+Alt+1 | Attached | Ctrl+Alt+5, then 2 |
| System actions | Ctrl+Alt+2 | Follow-up | Ctrl+Alt+5, then 3 |
| Folder actions | Ctrl+Alt+3 | Search | Ctrl+Alt+5, then 4 |
| QuickActions | Ctrl+Alt+4 | Sent Messages | Ctrl+Alt+5, then 5 |
| Navigation to sections | Ctrl+Alt+5 | Completed Work | Ctrl+Alt+5, then 6 |
| | | Open Patients | Ctrl+Alt+5, then 7 |
| Moving Focus | | | |
| In Basket toolbar | Ctrl+Alt+1, then T | | |
| Standard actions | Ctrl+Alt+1, then B | | |
| Folder navigation | Ctrl+Alt+1, then N | | |
| Message list | Ctrl+Alt+1, then M | | |
| Report tabs | Ctrl+Alt+1, then R | | |
| Report content | Ctrl+Alt+1, then D | | |
| Actions | Ctrl+Alt+1, then A | | |
| QuickActions | Ctrl+Alt+1, then Q | | |
| Home screen | Ctrl+Alt+1, then H | | |
| System Actions | | | |
| Home | Ctrl+Alt+2, then H | | |
| New Message | Ctrl+Alt+2, then U | | |

| | | | |
|--------------------------|------------------------------------|--------------------------------------|--------------------|
| New Patient Message | Ctrl+Alt+2, then Y or Ctrl+Shift+M | Changing Selection | |
| Manage Pools | Ctrl+Alt+2, then G | Select previous message | Ctrl+[|
| My Pools | Ctrl+Alt+2, then P | Select next message | Ctrl+] |
| Search | Ctrl+Alt+2, then S | Select previous folder section | Alt+Shift+Comma |
| Attach | Ctrl+Alt+2, then A | Select next folder section | Alt+Shift+Period |
| Out of Contact | Ctrl+Alt+2, then T | Go back | Ctrl+Alt+B |
| Preferences | Ctrl+Alt+2, then E | Go forward | Ctrl+Alt+F |
| Manage QuickActions | Ctrl+Alt+2, then K | Select previous sibling folder | Alt+Shift+Left |
| Sort | Ctrl+Alt+2, then O | Select next sibling folder | Alt+Shift+Right |
| Filter | Ctrl+Alt+2, then I | | |
| Clear applied filter | Ctrl+Alt+2, then V | Working with the Report | |
| Message list preferences | Ctrl+Alt+2, then C | Copy selection | Ctrl+C |
| Report preferences | Ctrl+Alt+2, then R | Display report for selected messages | Ctrl+Enter |
| Toggle folder navigation | F3 or Ctrl+Alt+2, then N | Show available links | Ctrl+K |
| Refresh In Basket | Alt+E or F5 or Ctrl+Alt+2, then F | Previous Quick Report | Ctrl+Alt+Page Up |
| | | Next Quick Report | Ctrl+Alt+Page Down |
| | | Activating Dropdowns | |
| | | New Message dropdown | Ctrl+Alt+U |
| | | New Patient Message dropdown | Ctrl+Alt+Y |
| | | Manage QuickActions dropdown | Ctrl+Alt+K |



GO-LIVE

NOVEMBER 6, 2022

Questions ?????

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