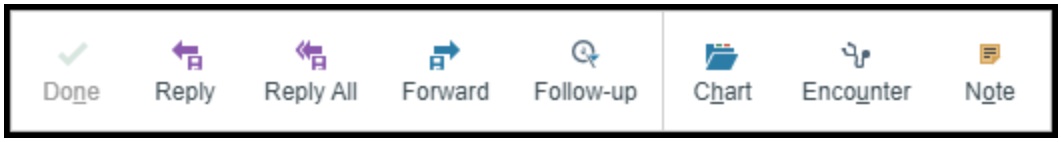
# In Basket Workflows and Scenarios

In Basket is Epic's task management tool. It's important to familiarize yourself with different message types and the actions available to you once live on Epic. Each message type has customized action buttons to help you complete a task directly from the message.

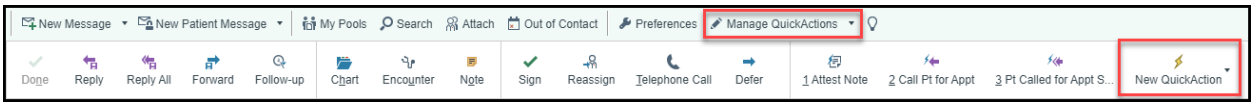
## Common Action Buttons




**Done:** Indicate necessary follow ups are complete and remove the message from In Basket.
**Reply/Forward:** Respond to the sender with a quick note, or forward with a request for someone else to follow up on the message.
**Follow-up:** Remove a message temporarily from your In Basket and postpone the message until a later date
**Chart:** Open the patient's chart to review more details.
**Encounter:** Open the encounter with which the message is associated
**Note**: Save clinically significant information to the patient's chart. The note is visible on the Notes tab of Chart Review, just like a progress note.

## QuickActions

QuickActions allow you to process routine messages in just a few clicks. You create them per message type.

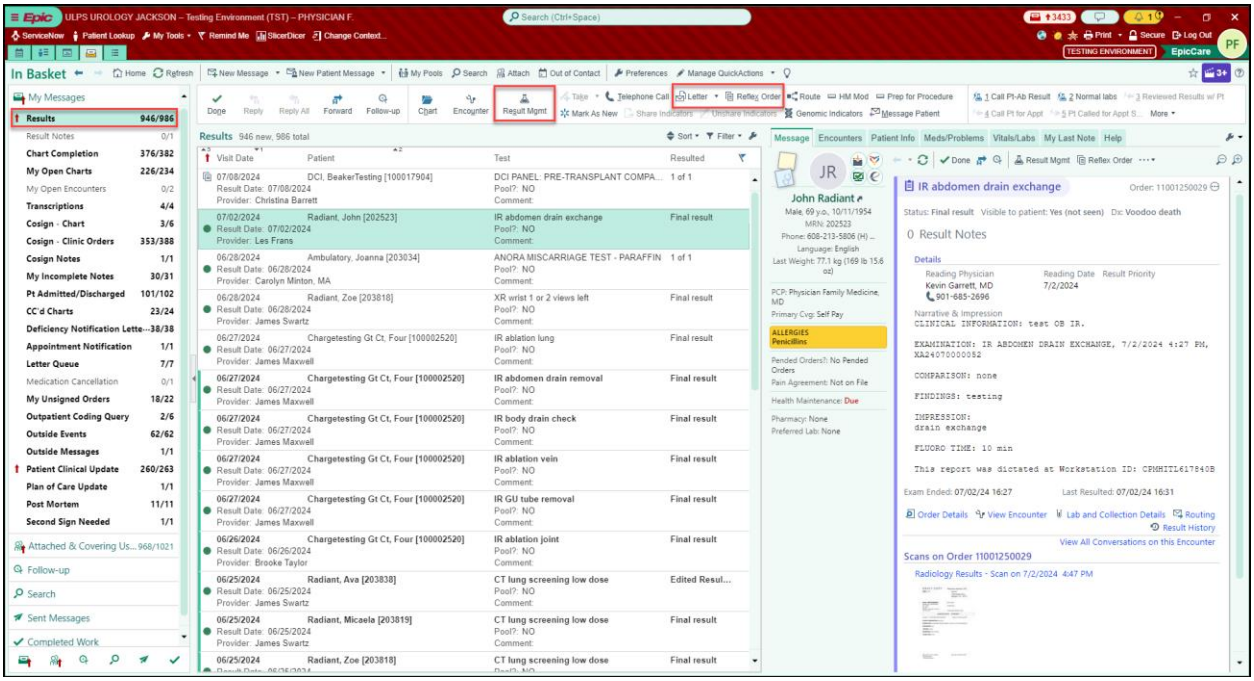


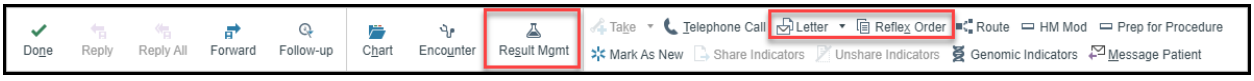

Make sure to configure QuickActions after go-live - Quick Actions created in practice environments will not transfer to your production environment.
For more information, refer to the QuickActions topic in your Outpatient Physician - In Basket Quick Start Guide.

# Actions per message type

## Result messages

You receive these messages from the system based on how results are routed at your organization.



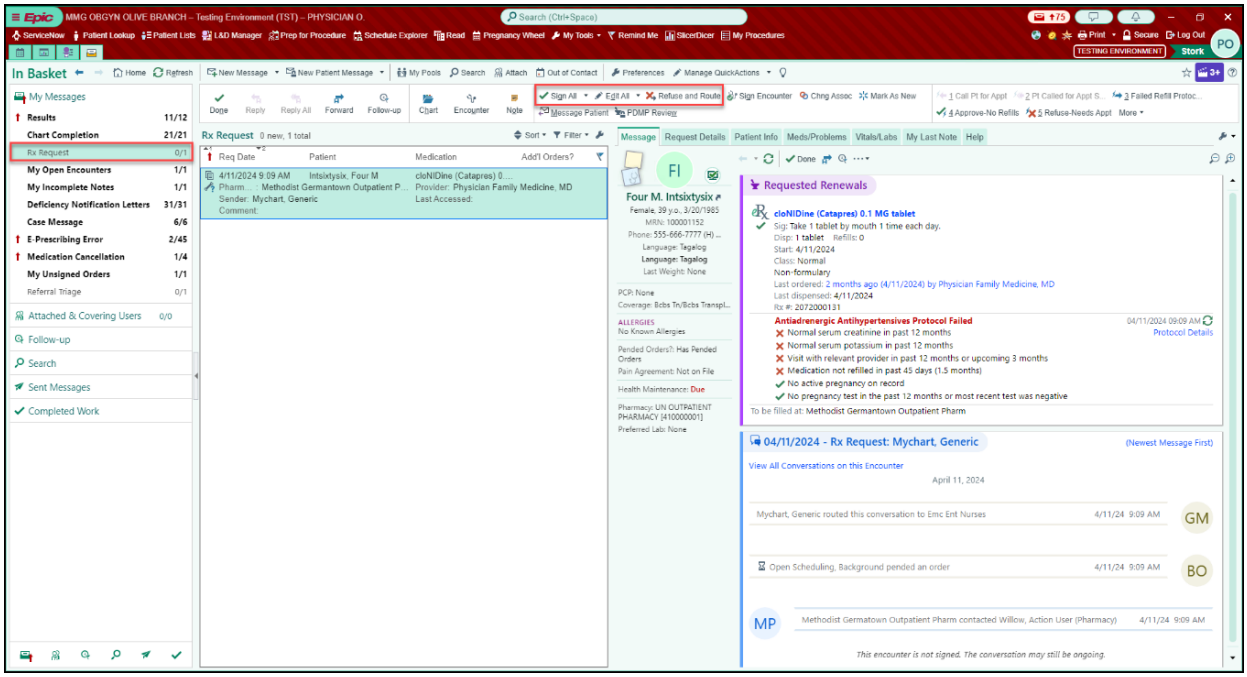



The following actions are specific to this folder:

- **Result Mgmt**: Add a note to the result, file a progress note to the chart, inform other clinicians about important results, or send a message to the patient's MyChart account.
    - Tip: Look for or create a QuickAction that automatically drafts the result note using your preferred text and recipients. You'll create these in user settings labs and after go-live.
- **Letter**: Write a letter.
- **Reflex Order**: Open an encounter to place additional orders for the patient if needed.

## Rx Request messages

You receive these messages from patients, pharmacies, or another user at your organization requesting a medication (usually a refill).



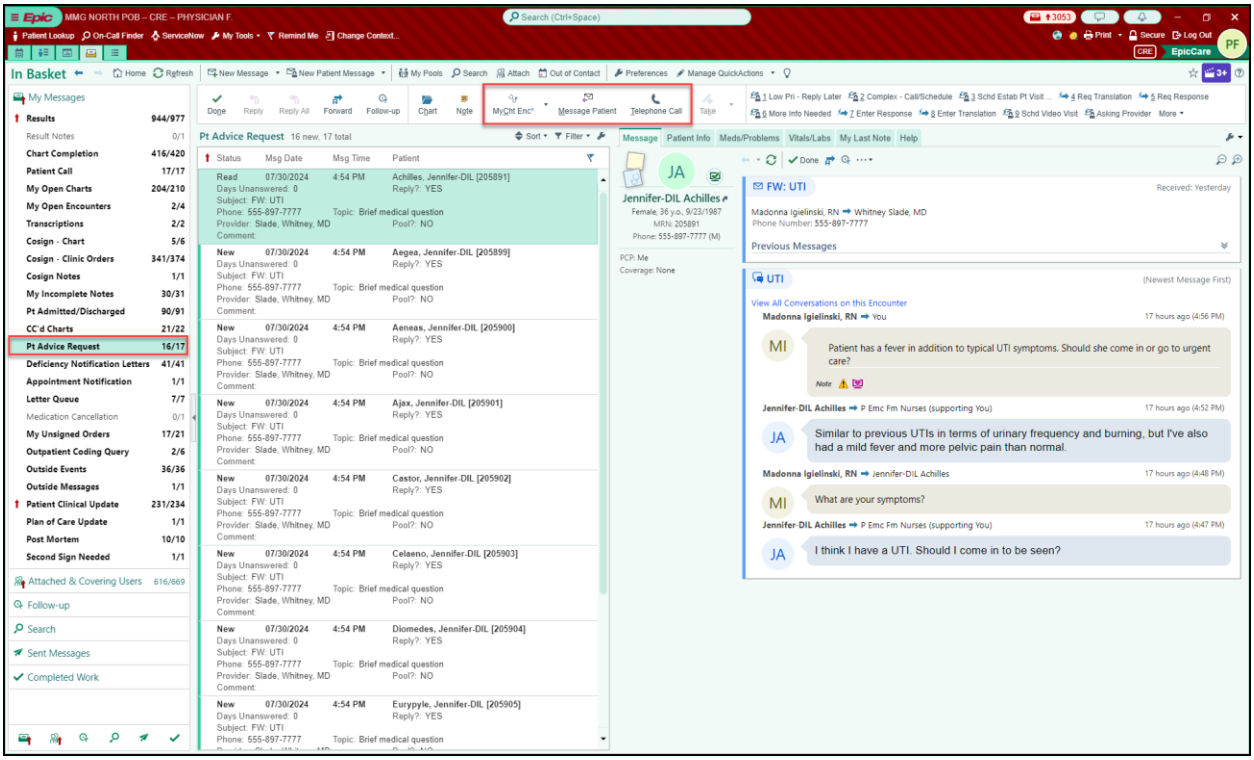



The following actions are specific to this folder:

- **Sign All:** Approve all requested medications, sign the orders, and automatically send a response to support staff.
- **Edit All:** Approve or refuse requested medications and change any of the medications' order details. If necessary, you can add a note to the patient's chart, send a response to staff, and close the encounter.
- **Refuse and Route:** Refuse all requested medications and send a response to support staff. If necessary, you can add a note to the patient's chart, send a response to support staff, and close the encounter.

## Patient Advice Request messages

You receive these messages when a patient asks a medical question from MyChart.



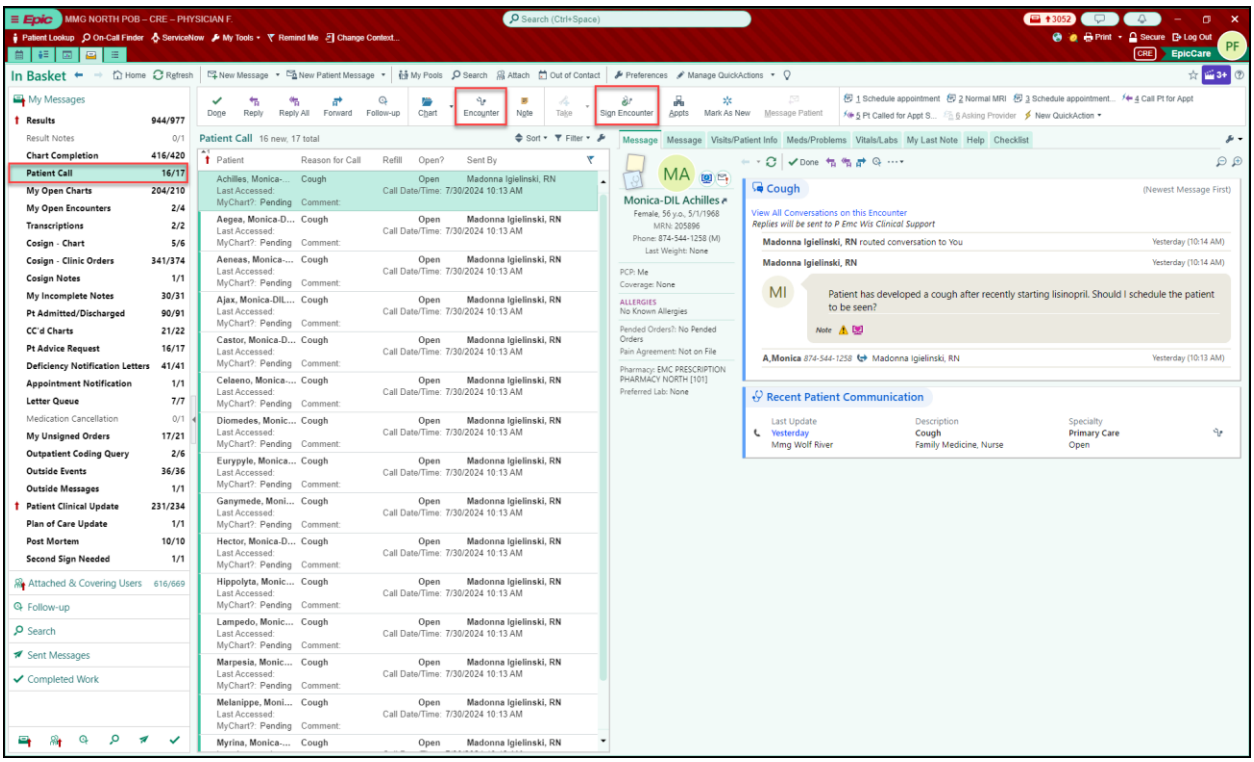


The following actions are specific to this folder:

- **MyCht Enc**: Open a MyChart encounter where you can reply to the patient and do additional charting (like place orders) from one place. You can route the message back to support staff from here if needed.
- **Message Patient:** Send a response to the patient's MyChart account and remove the message from your In Basket. Use SmartPhrases to quickly add common advice. Include a questionnaire by clicking **Add** next to **General Questionnaire** or **History Questionnaire**.
    - Tip: Look for or create a QuickAction that automatically drafts the message with your preferred text.
- **Telephone Call**: Call the patient and create a separate telephone encounter to document your discussion.

## Patient Call messages

You receive these messages when someone sends you a telephone encounter. They typically have a specific question or follow-up task for you.



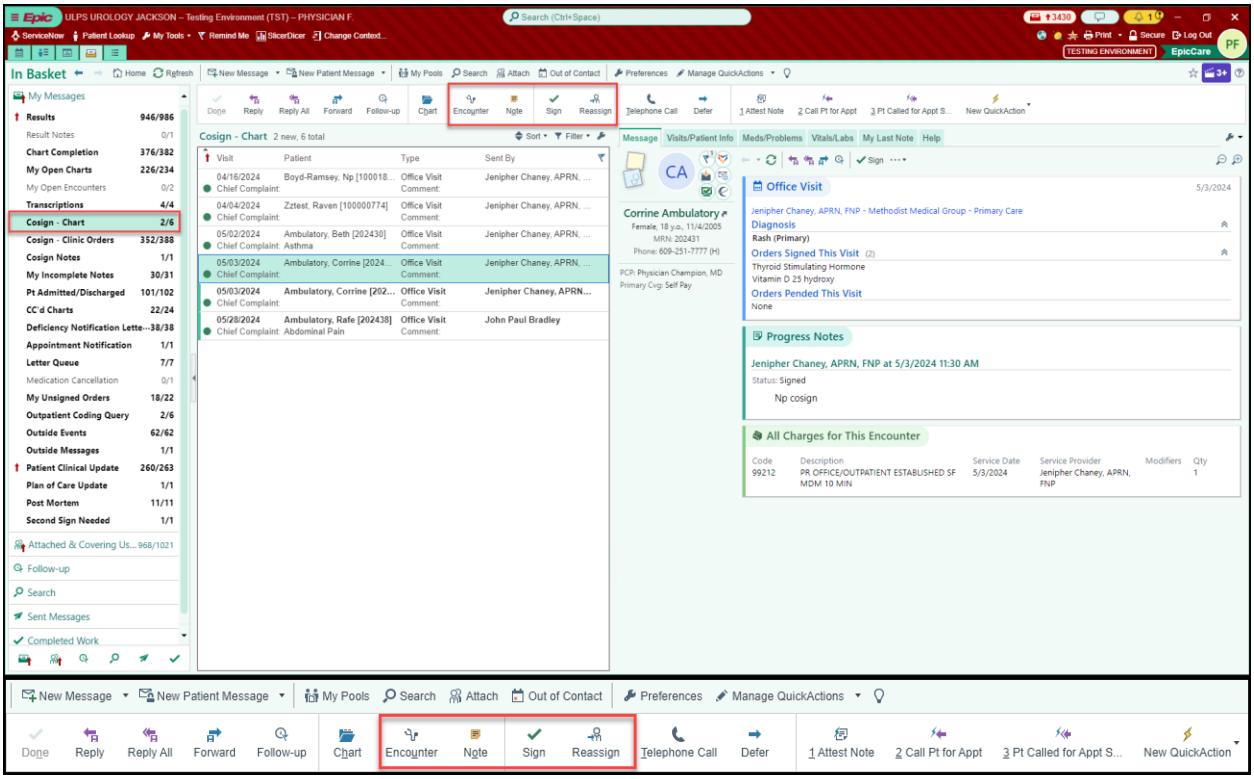



The following actions are specific to this folder:

- **Encounter**: Open the telephone encounter. This is typically only necessary if you need to place orders for the patient.
    - While in the encounter, you can do many other things, including review the patient's information, write a note, document that you called the patient, and send the encounter back to someone else (like the original sender) in a Patient Call message.
    - Close the encounter if no additional follow up (by anyone) is needed. For example, if the nurse still needs to contact the patient to let them know you sent a prescription to the pharmacy, document that in your note and route the encounter back to the nurse. He will close the encounter after completing any remaining follow up.
- **Sign Encounter**: Close the encounter and remove the message from your In Basket. Only do this if no additional follow-up by any team member is necessary.

## Cosign - Chart messages

You received these messages when someone lists you as the cosigning provider for an encounter.



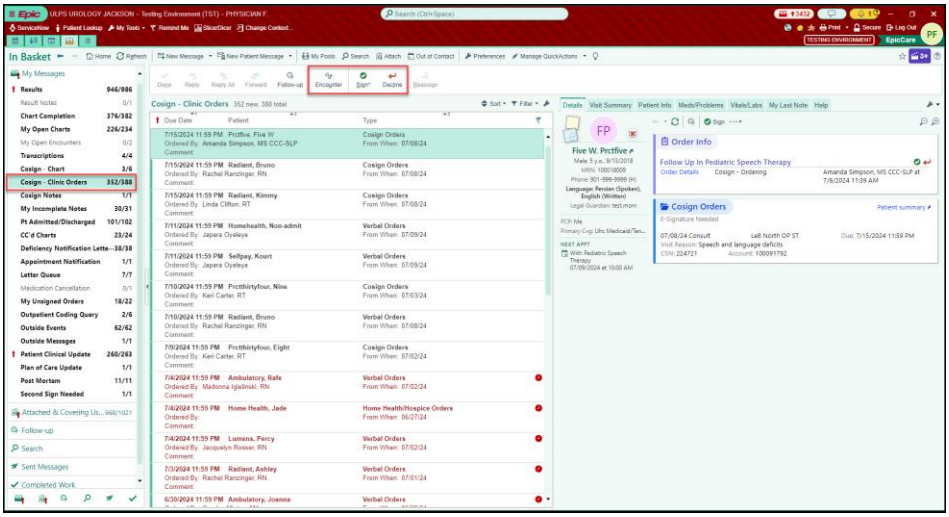

The following actions are specific to this folder:

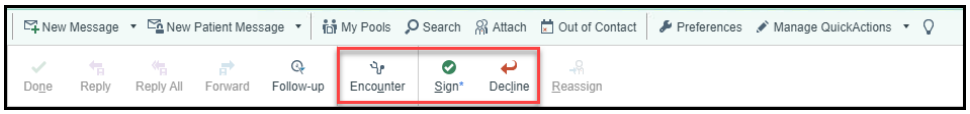
- **Note**: Enter a note, such as an attestation statement, and save it to the patient's chart as a progress note.
    - Tip: Use the Attest Note QuickAction or create a custom one that automatically drafts the note with your preferred attestation text.
- **Reassign**: Send the Cosign - Chart message to another clinician if you are not the appropriate person to cosign this encounter. This removes the message from your In Basket.
- **Encounter**: Open the encounter. This is typically only necessary if you need to adjust or place additional orders for the patient.
    - Note that any existing orders are transmitted before your cosignature is entered. If you need to cancel or change an order, additional follow-up with the patient, the lab, or the pharmacy might be required.
    - If you create an addendum (because the encounter has already been closed), be sure to sign it when you're done.
- **Sign**: Cosign the chart and remove this message from your In Basket.

    - Tip: To cosign multiple messages at once, press **Ctrl** while you select them, then click **Sign**.

## Cosign - Clinic Orders messages

You receive these messages when you're listed as the cosigning provider when someone places an order order, someone places a verbal order on your behalf, or someone reassigns this message to you.





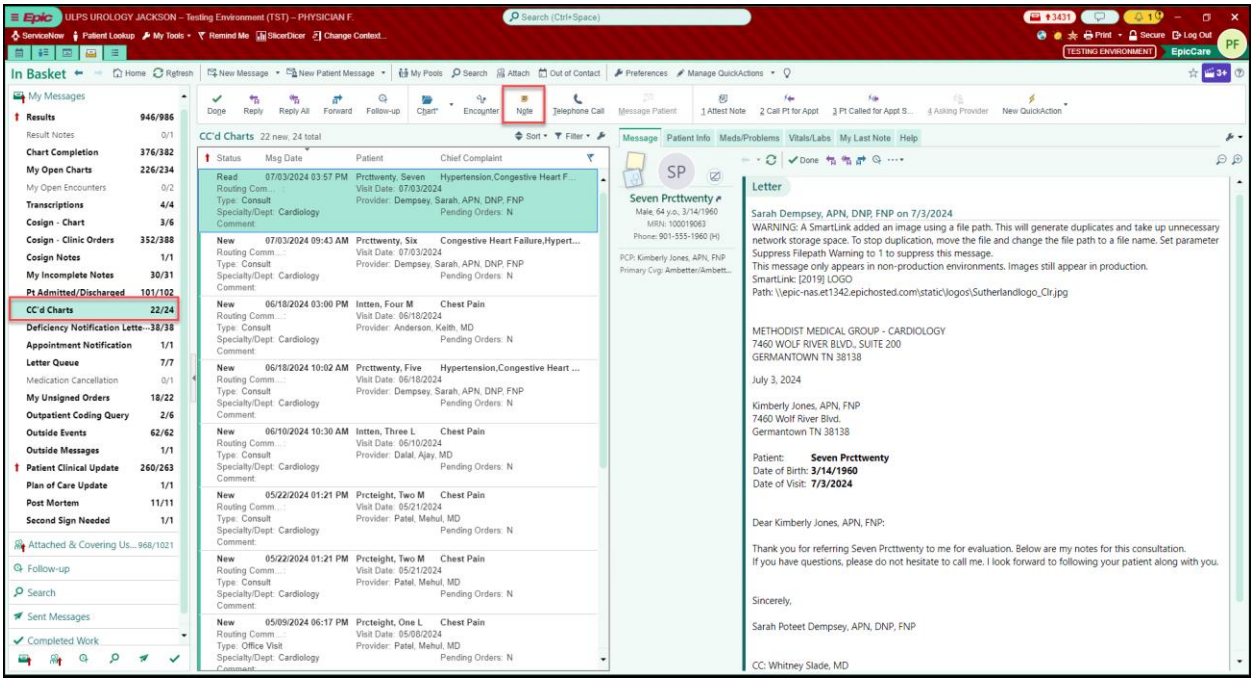

The following actions are specific to this folder:

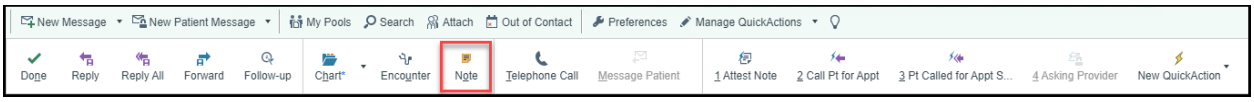
- **Sign**: Cosign the orders and remove this message from your In Basket.
    - Tip: To cosign multiple messages at once, press **Ctrl** while you select them, then click **Sign**.
- **Decline**: Send the Cosign - Clinic Orders message to another clinician if you are not the appropriate person to cosign the orders. This removes the message from your In Basket.
    - If you know who should cosign the orders, select the **Other user** option in the Decline window and enter their name.
    - If you don't know, the message will be sent to a pool of HIM staff who will follow up.
- **Encounter**: Open the encounter. This is typically only necessary if you need to adjust or cancel the orders that were placed.
    - Note that any existing orders have already been transmitted. If you need to cancel or change an order, additional follow-up with the patient, the lab, or the pharmacy might be required.
    - If you create an addendum (because the encounter has already been closed), be sure to sign it when you're done.
    - After you cancel an order, decline the message to remove it from your In Basket.

**Important:** You might see Home Health and Hospice verbal orders in your Cosign - Clinic Orders folder. Signing these orders quickly is important for patient care, regulatory compliance, and Medicare reimbursements. Check this folder often.

## CC'd Charts messages

You receive these messages when another person chooses to send you an Encounter Summary report, a custom report, or a letter from a patient encounter.






The following actions are specific to this folder:

- **Note**: Enter a note, such as an attestation statement, and save it to the patient's chart as a progress note.
    - Tip: Look for or create a QuickAction that automatically drafts the note with your preferred attestation text.

# Pt Advice Request Message

SCENARIO:

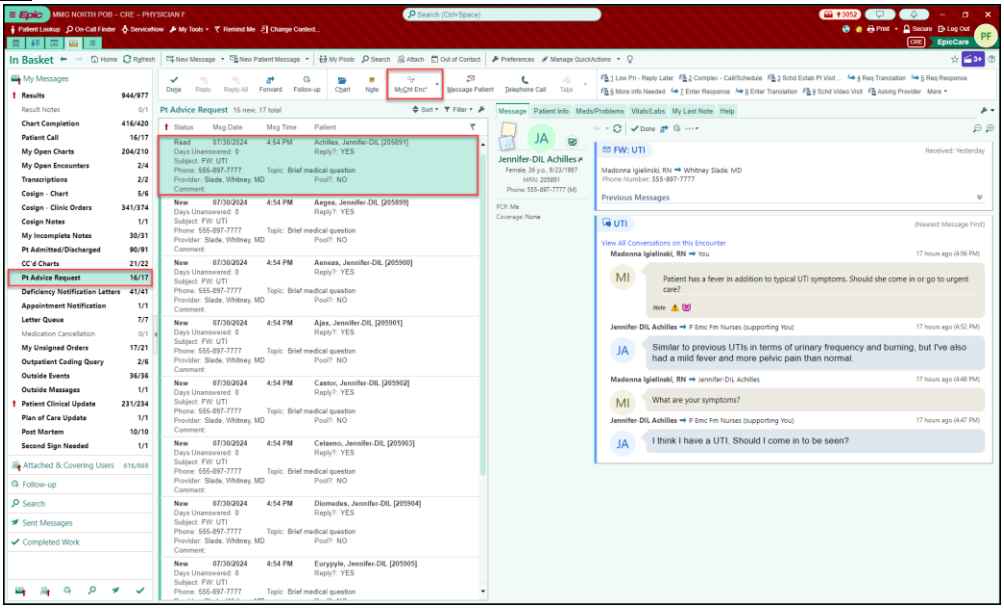
Jennifer is a 33-year-old who believes she has a UTI and sent a message from MyChart. You'll place an order and send a message to support staff to follow up with the patient.

- PATIENT: Jennifer

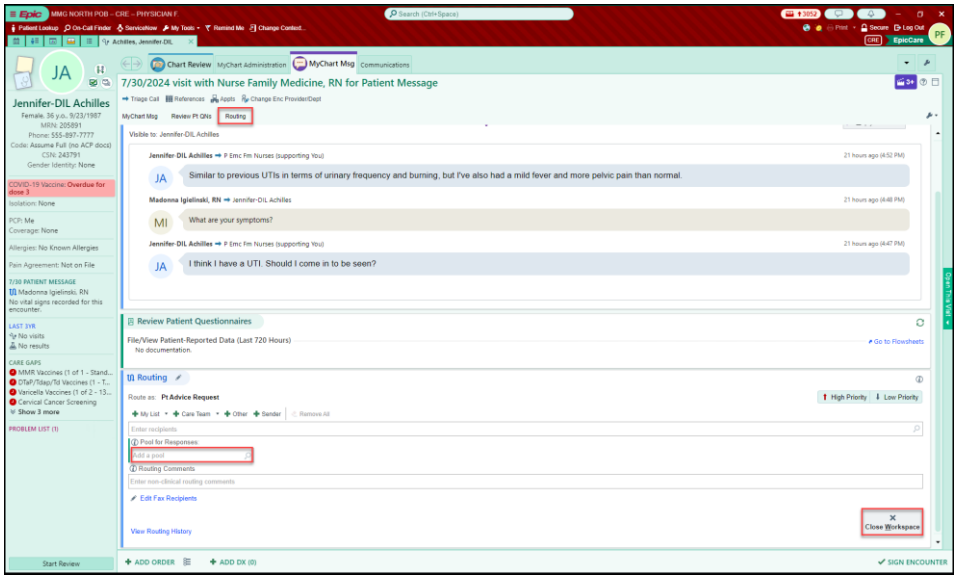
LOGIN:

- Username: fammd
- Password: epictestuser

TRY IT OUT:



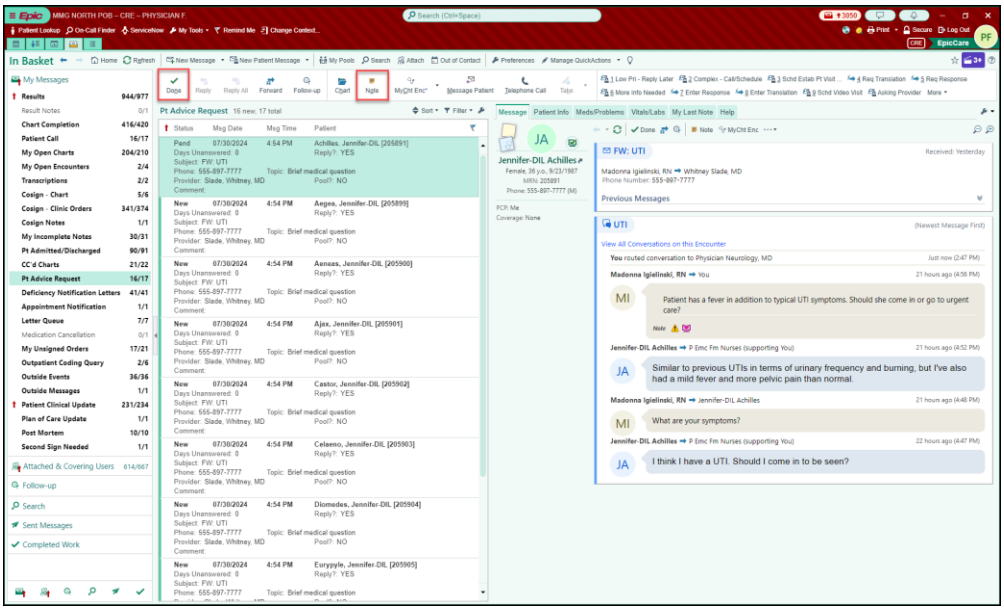

- Go to the **Pt Advice Request** folder and select the message for Jennifer.
- Open the patient's MyChart encounter.
  - Hint: Click **MyCht Enc**.
- Enter and sign an appropriate order.




- Send this encounter to support staff for follow-up.

- Hint: Go to the **Routing** section and enter a recipient, such as the [ENTER CLINIC NAME CLINICAL]. That way, the first available person can follow up.

- Click **Send and Close Workspace**.
  - **CRITICAL**: Do not sign the encounter unless no additional follow-up is required. The support staff will continue to document on this encounter when they follow up on your message.




- Click **Done** to remove this message from your In Basket.
- **NOTE:** Click **Note** to create an encounter note from the request. The MyChart encounters are meant specifically for patient messaging rather than a full-fledged encounter.

# Patient Call

SCENARIO:

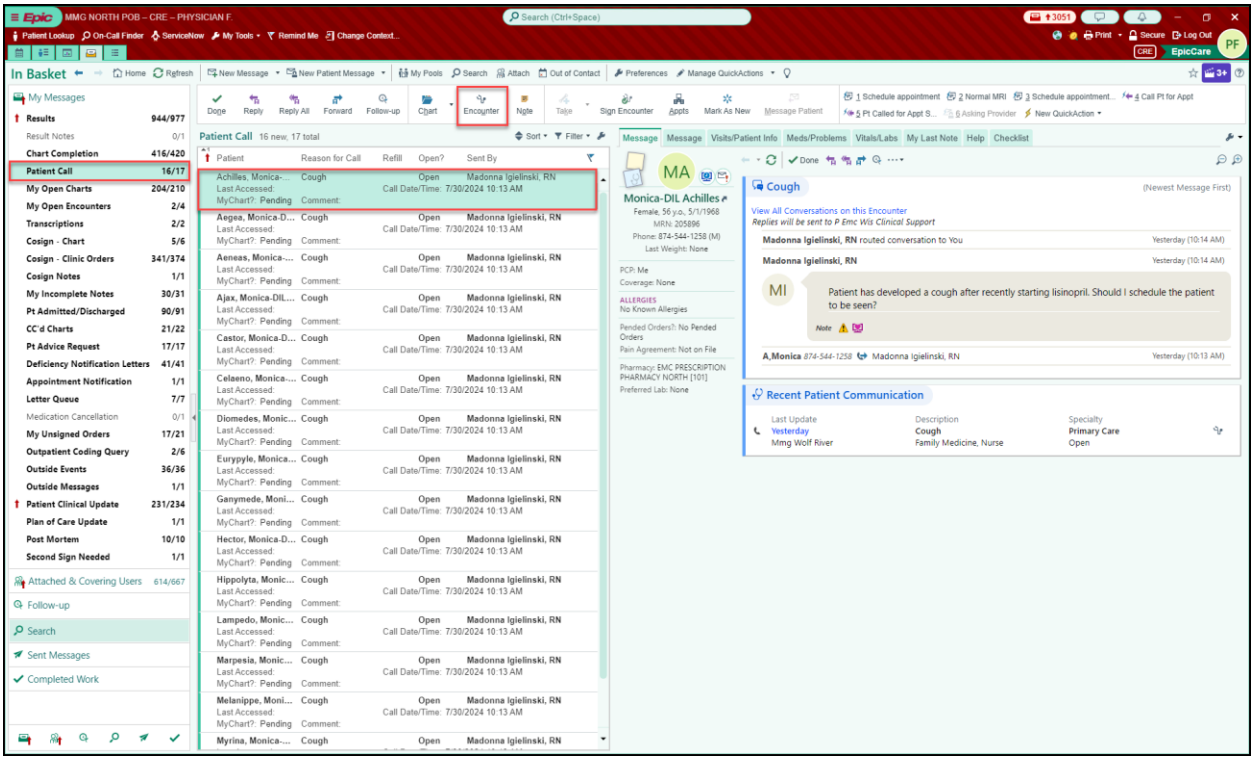
Monica has developed a cough after taking one of her medications. You'll prescribe something else and ask support staff to follow up with the patient.

- PATIENT: Monica

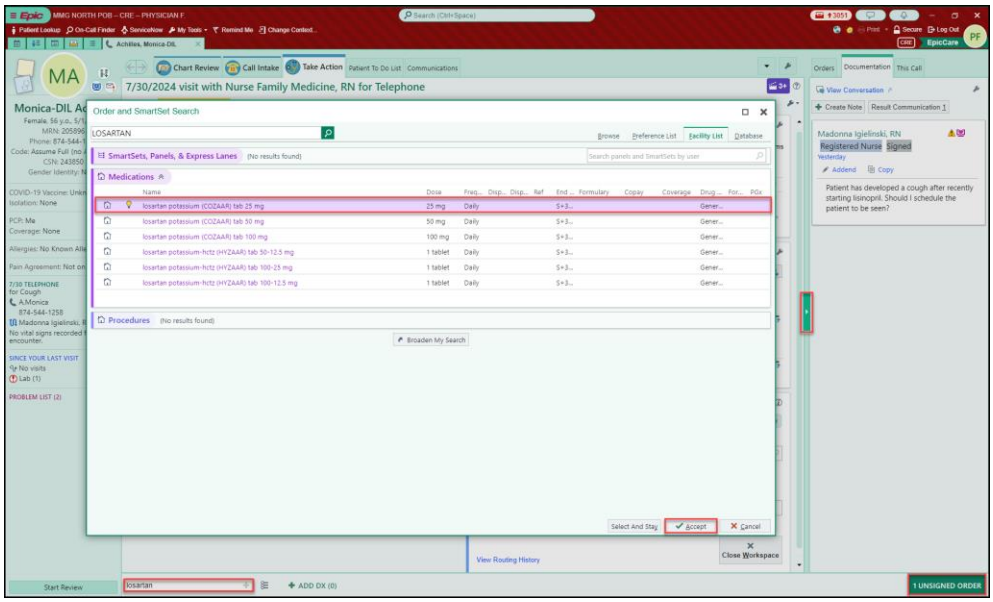
LOGIN:

- Username: fammd
- Password: epictestuser

TRY IT OUT:



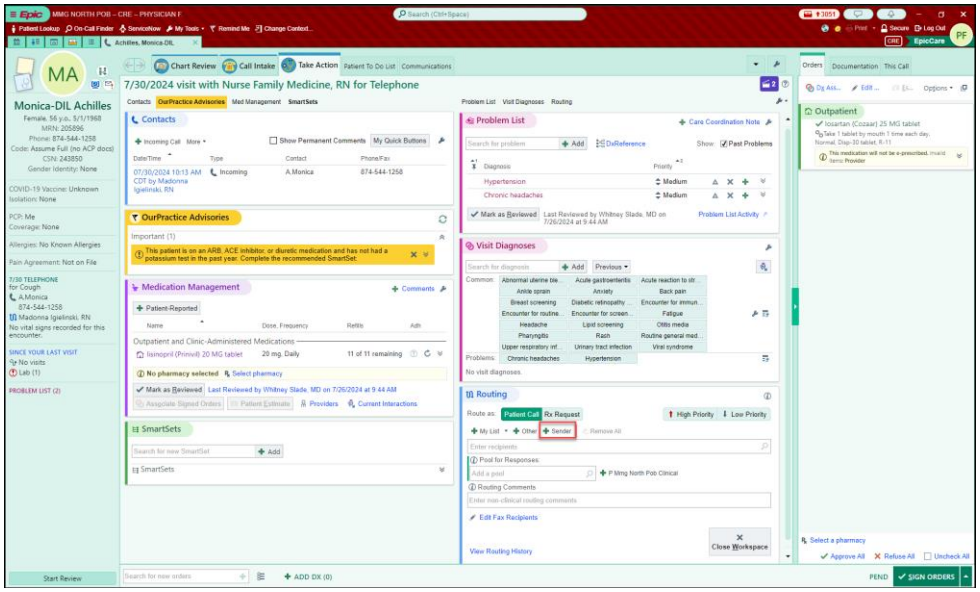

- Go to the **Patient Call** folder and select the message for Monica.
- Open the patient's telephone encounter.
    - Hint: Click **Encounter**.



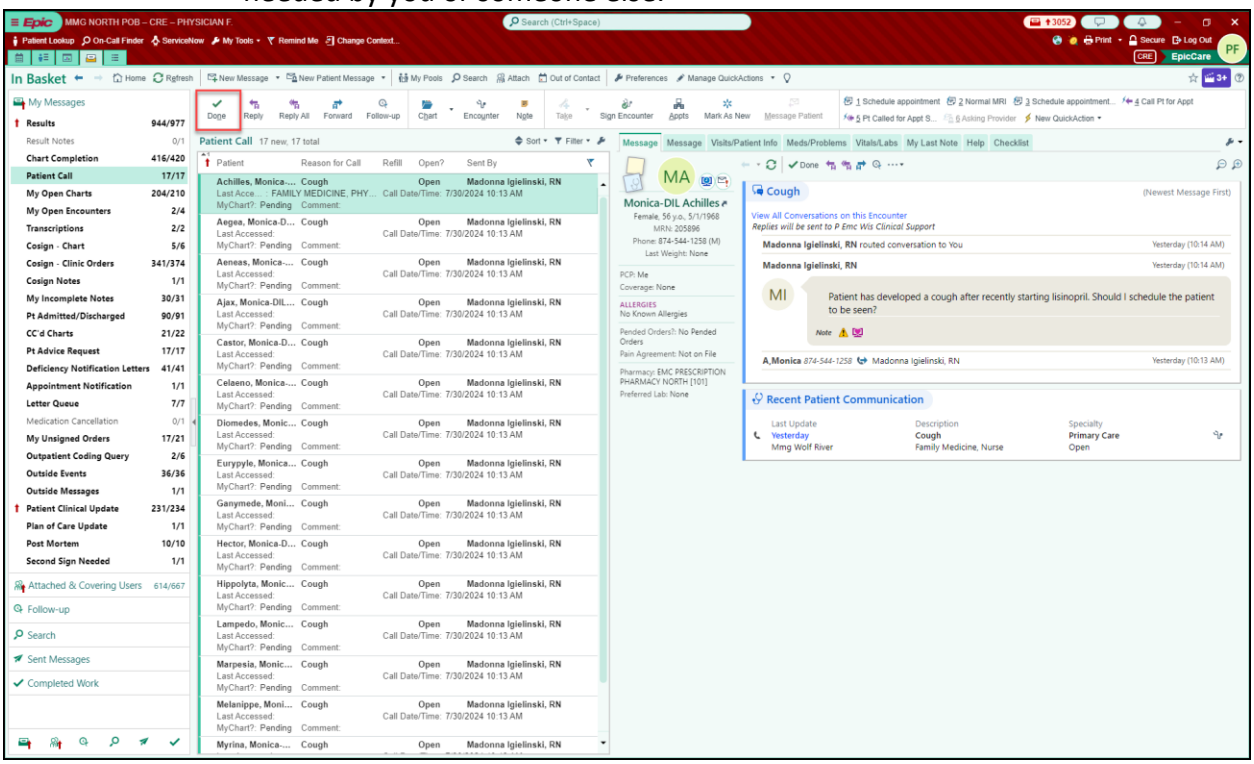

- Order a different medication to manage her hypertension (ex. Losartan 25mg daily).
- Sign the order.
- Open the sidebar if it's not already open.

- Hint: Click the small arrow on the far right of your screen.

- Write a brief note that will be saved to the chart and added to the message you send to support staff.



- Route this Patient Call message back to the sender.
  - Hint: In the **Routing** section, click **Sender**. Then, click **Send and Close Workspace**.
  - **CRITICAL**: Do not close or "sign" the encounter if additional follow-up is needed by you or someone else.



- Mark the message as **Done** to indicate your task is complete and remove the message from your In Basket.

# Questions

When you've completed all scenarios, write down any questions you have. Ask these during your discussion group or ask a super user after the session.