


# In Basket

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# Introduction to In Basket


In Basket is Epic's communication hub, where you can send and receive messages and work through tasks. When you have outstanding documentation requirements, such as orders to cosign or transcriptions to sign, you receive a Chart Completion message in your In Basket. Following up on these messages maintains the integrity of your patients' charts and keeps your organization in line with standards set by credentialing groups such as the Joint Commission.

To view your messages, select the  workspace tab and select the **Chart Completion** folder. The Deficiency and Status columns indicate what documentation you need to complete. Select a message to view more details in the bottom pane.

The following pages explain the most common message statuses and how to complete the messages so they disappear from your In Basket.

↑ My Messages	> Chart Completion 5 unread, 7 total		Sort & Filter ▾	
↑ Results (4)	⚠ Due Date	Patient	Deficiency	Status
Chart Completion (5)	4/14/2017 1:48 PM	Achilles, Gabby-SUR	History & Physical	Document/Dictate
Rx Request (1)	From When: 04/13/17			
Patient Call (1)	4/14/2017 6:10 PM	Achilles, PostCamilla-SUR	Verbal Orders	E-Signature Needed







Click  **Help** on the message toolbar after selecting a Chart Completion message to see a brief explanation of why you received a deficiency message and how to resolve several types of deficiencies.

## Cosign Needed


### Why did I get it?

You have a note to cosign.

### How do I complete it?

Click	...to take this action
 <b>Sign</b>	Sign the note.
 <b>Edit</b>	Make changes to the note. When you're done, sign it.
 <b>Decline</b>	Decline a message you received in error. Enter a reason, such as "I did not supervise this resident." The message is sent back to the HIM department for reassignment.
 <b>Already Done</b>	Indicate that you already completed the work. Enter a reason, such as "Completed on paper."



The In Basket icon () at the bottom of the screen indicates that you've received a message. Icons also appear in Patient Lists when a patient has notes or orders to cosign.







To see all notes for this admission, click  **Jump To** to open the Notes activity.

# E-Signature Needed

## Why did I get it?

You have an order or transcription to cosign. Note that orders awaiting cosign appear on the MAR and nurses can carry them out before you provide your cosignature.

## How do I complete it?

Click	...to take this action
 <b>Sign</b>	Sign the order or transcription.
 <b>Edit</b>	Make changes to the transcription. If the transcriptionist can't hear you, he includes a wildcard (***) in the note. Press "F2 "to search for wildcards and enter the missing information.
 <b>Decline</b>	Decline a message you received in error. Enter a reason, such as "I did not supervise this resident." The message is sent back to the HIM department for reassignment.
 <b>Already Done</b>	Indicate that you already completed the work. Enter a reason, such as "Completed in paper chart."







If you need more information about the patient, click  **Enc** to quickly open the chart.

# Document/Dictate

## Why did I get it?

You need to write or dictate a note.

## How do I complete it?

Click	...to take this action
 <b>Jump To</b>	Open the Notes activity, where you can write and sign a note.
 <b>Enc</b>	Open the patient's chart.
 <b>Decline</b>	Decline a message you received in error. Enter a reason, such as "Patient is not mine." The message is sent back to the HIM department for reassignment.
 <b>Already Done</b>	Indicate that you already completed the work. Enter a reason, such as "Completed in paper chart."





To narrow down your list of messages, select the **Chart Completion** folder and click a filter button to the right of the list of messages. For example, click **Document/Dictate** to see only messages with this status. Note that the sort and filter buttons appear only before you select a message.

## Note Pending

### Why did I get it?

You pended a note and need to sign it. Pended notes appear as incomplete to other clinicians.

### How do I complete it?



Click	...to take this action
 <b>Edit</b>	Make changes to the note. When you're done, sign it.
 <b>Enc</b>	Open the patient's chart.

## Response Needed

### Why did I get it?

Coding or CDI staff sent you a question.

### How do I complete it?

1. Select the  **Encounter Summary** report to review the clinical information and determine the appropriate follow-up.
2. Click  **Enc** to open the patient's chart and make corrections or additions.
3. Return to the In Basket message and click the **Already Done** link in the **Details** report to let the coder know that this documentation is complete. The message disappears from your In Basket.



Reply directly to the coder who sent you the message if you disagree or if you have follow-up questions. To do so, click the **Reply** link in the **Details** report for the message. Enter your response to the coder and click **Accept**. The message is sent to the coder and disappears from your In Basket.

## Sort and filter deficiencies in your In Basket

The system remembers your sorting preferences when you return to this folder later.

### Sort your messages

1. In your In Basket, select the Chart Completion folder.
2. Click **Advanced Sort** next to the message list.
  - Note that the sort and filter buttons appear only before you select a message.
3. In the Sortable Fields list, select the first column by which you want your messages sorted and click **Add >**.
4. If you want to sort by a second or third column, select the appropriate column and click **Add >**.
  - Change the sort order of a column by clicking the arrows next to the Sort By section.
5. Click **Accept**.
  - To clear your sorting preferences, click **Default Sort** below the message list.



Sort or filter messages based on a single criterion. Click **Sort & Filter** at the top right of your screen. Select the option you want from the menu.

## Filter your messages

1. In your In Basket, select the Chart Completion folder. Several filter buttons appear next to the list of messages.
  - These buttons are only available before you select a message.
2. Click one of the buttons, such as **Overdue** or **ESign**, to filter your messages.
3. To remove the filter, click **Filtered by: (filter)** **✕** on the folder toolbar.

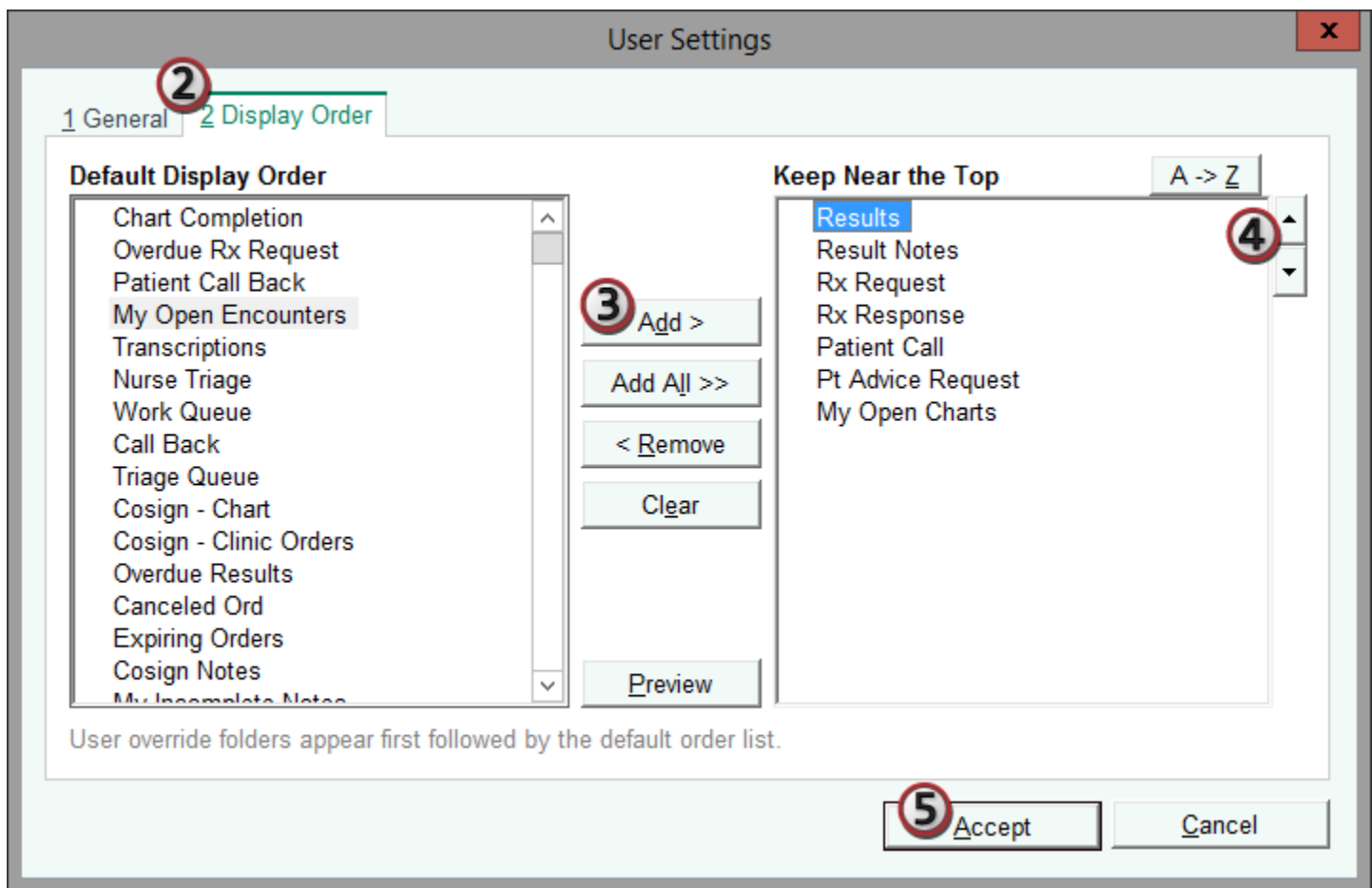


To help make sure that you don't miss any important new messages, In Basket removes any applied filters when you log out.

## Change the order of your In Basket folders



To make it easier to find important or frequently used folders, you can move them to the top of the list. Or, if you prefer, you can alphabetize the entire list.

1. On the In Basket toolbar, click **⚙ Settings**.
2. In the User Settings window, go to the **Display Order** tab.
3. Select your most frequently used folders in the **Default Display Order** column and click **Add >** to move them to the **Keep Near the Top** column.
  - To remove a folder from the **Keep Near the Top** column, select it and click **< Remove**.
4. Rearrange the folders in the **Keep Near the Top** column according to your preferences. Select a folder and use the **▲** and **▼** buttons or drag and drop the folders. When these folders contain messages, they appear at the top of the folder list pane in the order you've specified.
  - The remaining folders continue to appear in the default display order below the folders you've moved to the top.
5. Click **Accept** to save your preferences.





To alphabetize all your In Basket folders, click **Add All >>** and then **A -> Z**.

## Decline or mark multiple deficiencies as done

1. In your In Basket, select the Chart Completion folder.
2. Select the deficiencies you want to act upon.
  - To select multiple messages, press and hold **Ctrl** while clicking each message.
  - To select a group of consecutive messages, select the first message, press and hold **Shift**, and select the last message.
3. Click the appropriate button on the message toolbar.
  - To decline the selected deficiencies, click  **Decline**.
  - To indicate that the selected deficiencies were already completed, click  **Already Done**.
4. Select the reason you're declining the deficiencies or marking them as Done. The reason you enter is applied to all the selected deficiencies.
5. Enter a comment if needed and click **Accept**.


## Update or complete a chart correction task from In Basket

1. Open your Chart Corrections In Basket folder and select the message you want to complete.
2. To open the Tasks activity, click  **Case**.
3. In the Tasks activity, read the description of the task in the upper right.

4. To jump to the patient chart and complete your correction task, click the patient's name link in the message pane.
5. After completing the assigned task, click **Corrected** in the Correction section and enter a description of your fix.
6. Click  **Mark as Complete**. The Chart Correction message is removed from your In Basket.
  - You might be asked to enter your log in credentials to sign off on your completion.




To contact the chart correction specialist who assigned you this task, click **+Ask Question** to send her an In Basket message.

7. In the case, click the task name link to open the task details.
8. Update the task status and click  **Confirm Completion**.
  - a. You might be asked to enter your login credentials to sign off on your task completion.


## Search for messages in your In Basket and save your searches

Quickly find specific messages in your In Basket with the Search feature. For example, you can search for all Results messages that have been marked as Done within a certain timeframe. If you often search for the same type of message, you can save your search for use in the future.

1. Click  **Search** on the In Basket toolbar.
2. Enter your search criteria in the window that appears. For example, to search for messages with a high priority, clear the **All** check box above the Priorities pane and select **High**.
3. If you're searching for specific message types, clear the **All** check box above the Message Types pane and select the appropriate message types.
4. Modify other criteria as needed and click **Search**.
5. For searches you want to use again in the future, click **Save As** in the search window, enter a name for your search, and then click **Accept**. Your search now appears under your name in the Available Settings pane for future use.
6. Your search results appear at the bottom of the In Basket screen. Click any folder to browse its contents. You can also browse the results of your search using the folders under the **Search Results** tab on the left.

## Save your most common recipients in personal distribution lists

If you often send notes, results, letters, or addenda to the same people, save the recipients in distribution lists called My Lists. Then, use your My Lists to add recipients to your messages in just a few clicks. For example, your results My List could include a colleague and the nurses in your department. Your letters My List could include the support staff who edit and send your letters.

1. Open an activity where you send messages to colleagues. For example, open a Patient Call message in your In Basket and click  **QuickNote**. Or, open a telephone encounter and go to the **Routing** section.
2. Click **Build My Lists**.
3. Enter your preferred recipients for this type of message in the **Recipient** list on the appropriate tab. To add a pool, such as your department's nurses, enter "p" followed by a space and the name of the pool.

4. Select the **Allow selection of individual recipients?** check box if you want the option of adding only some recipients from your list. This option is useful, for example, if you route some messages to residents, some to nurses, and some to both.
5. Click **Accept** to save your list.

### Use your MyList to quickly add recipients for a message

To use the My List when sending a message, click **Add My List** or **Add Recips**.

A. If you selected the **Allow selection of individual recipients?** check box when building your list, an **Add Recips** button appears instead of the **Add My List** button. Click **Add Recips** and select the specific recipients to add, or select the **Add My List** option to add your entire list.

B. To add recipients from other My Lists, click ▼ next to **Add My Lists** or **Add Recips** and select the list you want to use.

The screenshot displays a software interface for routing notes. At the top, there are checkboxes for 'Route Note To' (checked) and 'Important'. Below these is a table with two columns: 'Recipient' and 'Modifier'. The 'Recipient' column contains a red exclamation mark icon. Below the table are three buttons: 'Add PCP', 'Add Recips', and 'Build My Lists'. The 'Add Recips' button has a dropdown arrow, and its menu is open, showing four options: 'P EMC FM NURSES [21000]', 'Pa Fmily Medicine, PA[PA]', 'Add My List for Routing Results', and 'Add from Multiple Lists'. A mouse cursor is pointing at the second option, 'Pa Fmily Medicine, PA[PA]'. To the right of the main interface, there is a 'Status of' section with a list of items: 'Order Pulmonary T3', 'Future', and 'X-ray Ches'.



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