

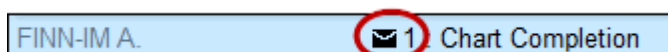
# Using and Personalizing In Basket

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 Reviewed, 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 your In Basket when certain events occur. For example, you might receive an In Basket message when the results of a lab test come back or when you open a telephone encounter.

## Introduction to In Basket

The In Basket icon (✉) at the bottom of the screen indicates that you have unread messages. It includes a colored background when you have high-priority messages (✉9).

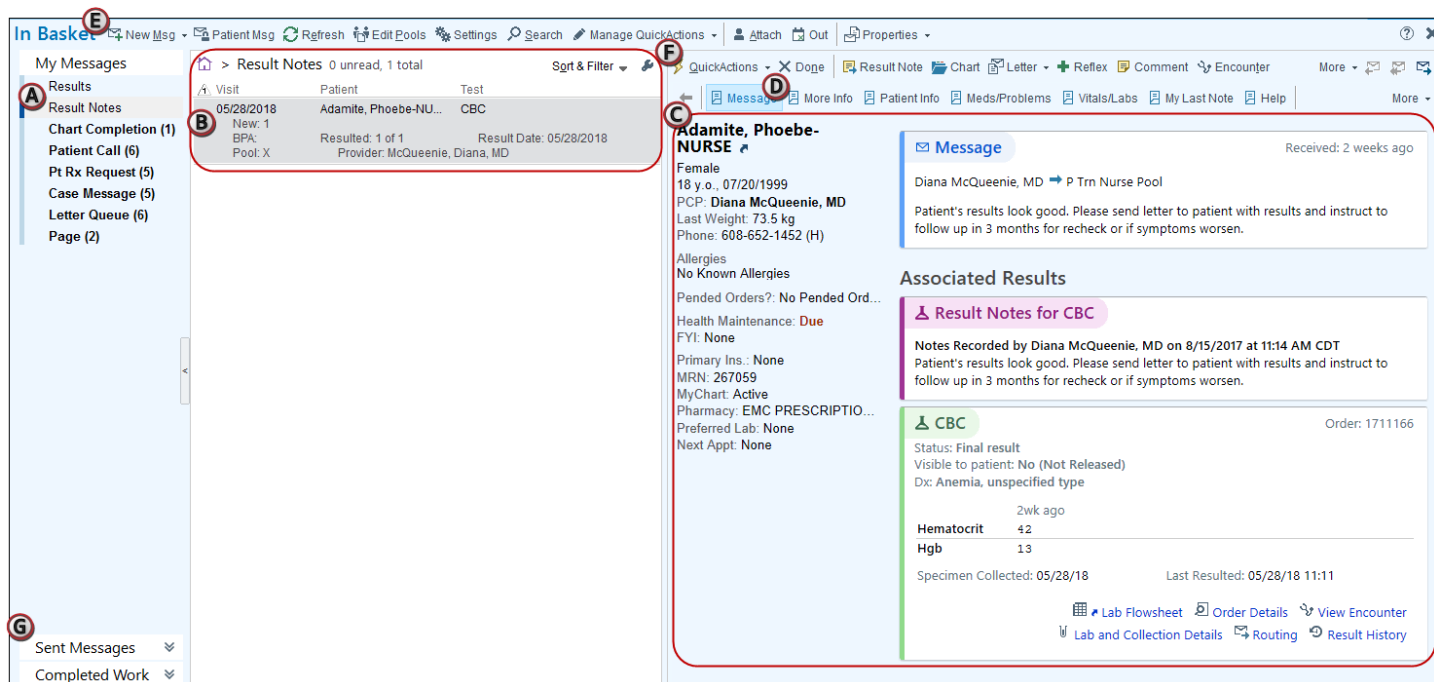


Click the In Basket icon at the bottom of your screen or select the ✉ workspace tab to open your In Basket.

Each part of In Basket has a different purpose, as explained below.

Click the In Basket icon at the bottom of your screen, or go to the ✉ workspace tab and click a folder in the In Basket Glance section.

Each part of In Basket has a different purpose, as explained below.



The screenshot shows the Epic In Basket interface. Callout A points to the 'My Messages' sidebar with folders like 'Results', 'Chart Completion (1)', and 'Patient Call (6)'. Callout B points to a message in the 'Chart Completion' folder. Callout C points to the message body for 'Adamite, Phoebe-NURSE'. Callout D points to the 'Message' section of the body. Callout E points to the In Basket icon at the top left. Callout F points to the 'QuickActions' menu. Callout G points to the 'Sent Messages' and 'Completed Work' filters at the bottom left.

A. **Folders** appear for each type of message you've received. Select a folder to view messages of that type.

B. When you select a folder, **messages** of that type appear here. Select a message in the list to view the body of the message.

C. The **body** of the selected message appears here.

D. For some message types, you can access additional **reports** using buttons on the toolbar above the message text and links within the text.

E. Buttons to perform general In Basket tasks and update settings that aren't specific to a given message type appear on the **In Basket toolbar**.

F. Buttons to act on the message you're viewing appear on the **folder toolbar**.

G. Go to the **Sent Messages** or **Completed Work** tabs to find messages you've sent or finished. If you're covering for one of your colleagues, an **Attached In Baskets** tab appears. If you have a patient's chart or visit open, an **Opened Patients** tab appears, so you can view messages specific to that patient.

## Sort your messages

You can sort your messages by clicking any column header. Click once to sort in ascending order. Click again to sort in descending order. You can also adjust the width of the columns and drag and drop them in a different order to match your preferences.

You can also sort by more than one column. For example, to make sure you see the oldest high-priority messages at the top of the list, sort by Priority first, and then Visit Date:

1. Click **Sort & Filter** above the folder toolbar and select **Advanced**.
2. Select a column you want to sort on from the **Sortable Fields** list and click **Add >**.
3. Use the **▲** and **▼** buttons to change the order of the columns on which you're sorting.

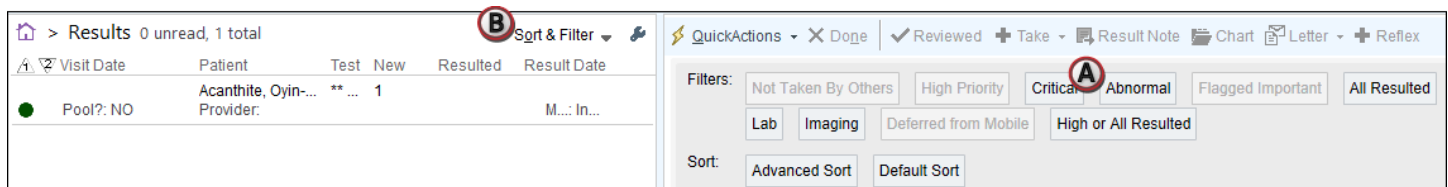
## Filter your messages

You can filter your In Basket messages in two ways:

A. Select a folder and, before selecting a message, click a filter button that appears next to the list of messages. For example, click **Abnormal** to see only abnormal results.

B. At any time, click **Sort & Filter** above the folder toolbar and then select a filter.

A notification appears above the folder toolbar when messages are being filtered. Click **✗** to the right of the notification to remove the filter and see all messages in the folder.



## Refresh In Basket


When In Basket refreshes, Epic checks for new messages, removes any messages that you have marked as Done, and removes any folders that no longer contain any messages.

In Basket automatically refreshes at regular intervals while you're completing your work and each time you open the activity. To refresh your In Basket manually, click **Refresh** on the In Basket toolbar.

# Why did I receive this message? What can I do with it?

Many types of messages include a Help report with information on how a message was sent, what you can do with it, and how to remove it from your In Basket.

To view the help report, follow these steps:


1. Select a message.
2. Click  **Help** in the report toolbar above the body of the message.
3. Scroll through the report to learn more about the message and actions you can take.



You can also click the **Frequently Asked Questions** heading in the Help report for more information on using In Basket.

## Send messages to staff

Most of the time, you'll be working with In Basket messages you receive, but sometimes you'll need to send a new message. For instance, you might send a message when you need to relay a phone message, have someone call a patient, or just ask a colleague a question.

1. From In Basket, click  **New Msg** to create a Staff message. Staff messages are commonly used to convey non-patient-related information.
  - You can also click the arrow to the right of the **New Msg** button to select another type of message, such as Patient Call Back.
2. On the **Message** tab, enter recipients in the **To** field. Use the format Last name, First name. Recipients you often use appear as you begin typing their names.
  - When entering more than one recipient, separate each name using a semicolon.



Completion matching is a fast way to locate recipients. For example, enter "smi,ale" to locate Alexander Smith. You can still use completion matching if you're entering multiple recipients. For example, entering "smi,ale;hat,jea" adds both Alexander Smith and Jean Hathaway to your recipients list.

3. Optionally, designate a priority for the message by selecting one of the Priority options, such as **High** or **Low**. This lets recipients know, at a glance, if your message needs immediate attention.
4. Complete or edit any other fields, depending on the type of message you are sending.
5. Enter your message in the **Notes** field.
6. Add flags to your message, if appropriate. Flags, such as "Call patient" or "Schedule follow-up appointment," quickly alert recipients to important information about your message.
7. Click **Accept** to send the message to the recipient, or click **Cancel** to discard the message.



To send the message at a later date, go to the **Options** tab. In the Send Date section, today's date is automatically used as the date on which this message should be sent, but you can enter a future date if needed. For example, you might write a message to your support staff now, but deliver it in a month, asking them to contact a patient to see how well a new medication is working. You can also enter an expiration date, if applicable. After a message has expired, it is removed from any recipients' In Baskets.