

In Basket Efficiency

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Overview

In Basket is the main tool you use to send and receive messages, as well as work through tasks. As with any messaging and task management system, following a few best practices can help you decrease the time you spend in In Basket. Refer to the following topics for In Basket etiquette reminders, prioritization techniques, and efficiency tips that you can start using today.

Cut Down on Clutter with Good In Basket Etiquette

Follow these best practices (and share them with your colleagues) to eliminate unessential messages from In Basket.

Avoid sending repetitive messages

The system often automatically sends routine messages on your behalf. In these cases, don't send an additional message manually. For example, the system automatically sends an Rx Response message when you approve an Rx Request message, so you don't need to manually reply to indicate that you approved the request.

The system does not automatically send a message on your behalf when you review a Results message, for example, because it's not clear if any follow up is needed. In this example, you would need to send a Result Note message to your support staff if you want someone to follow up with the patient. When you click  **Result Note**, you can quickly send a message to your staff as you're adding your comments to the patient's chart.



To make sending follow-up messages even faster, create QuickActions for routine scenarios. Refer to p. 9 for more information on creating QuickActions.

Send fewer informational-only messages

If you don't need the recipient of your message to follow up, reconsider sending the message. Remember that other members of the patient's care team have access to the patient's chart and can review relevant information when they need it.

Include instructions when you forward a message

If you need to forward a message to someone else for follow-up, include some additional context in your message. For example, indicate that you need them to call the patient and when the follow-up needs to be complete.

Quickly follow up on repetitive or unclear messages

Create SmartPhrases and QuickActions to quickly add common instructions to your In Basket messages. Consider creating SmartPhrases or QuickActions to address the previous scenarios. For example, create a QuickNote QuickAction that sends a response with the text, "Please let me know what follow-up you need from me and by when."

Share your SmartPhrases and QuickActions with your colleagues to facilitate more effective communication in In Basket.



Refer to p. 9 for more information on creating QuickActions.

Prioritize Your Messages and Clear Out Your In Basket

The following tips and prioritization techniques can help keep your In Basket message volume down, so you can focus on the messages that need your immediate attention.

Identify and organize messages that need your follow-up

When you have a few minutes to spare, use that time to review new messages in your In Basket and determine whether you need to follow up and when. You can also use this time to quickly remove any low priority or low urgency messages.

Based on your assessment of each message, take one of the following actions:

Type of Follow-Up Required	How to Handle the Message
You need to follow up, and it'll take only a few minutes. Or, you need to follow up, and it's an urgent message.	Take the appropriate action to complete the message now. Use QuickActions or SmartPhrases to quickly respond to routine messages.
You need to follow up at a later date.	Click  Properties on the main In Basket toolbar and choose a date in the Postpone section to temporarily remove the message from your In Basket.
Someone else needs to follow up.	Click  (or  Reassign for Cosign messages) to pass the message on to the appropriate person.
No follow-up is required.	Mark the message as Done to remove it from your In Basket now.

When you need to follow up, remember that most of the patient information you need is typically available right from In Basket. Use the report toolbar above the body of the message to review this information without jumping to the patient's chart. For example, you can quickly review your last progress note or the patient's medication list.

Home > Results 5 unread, 18 total Sort & Filter

QuickActions Done Result Note Chart Result Flowsheet Result Release More

Status	Visit Date	Patient	Test	New	Resulted	Result Date
Read MyC: Active	04/08/2017	Sturgis, Catherin Note:	CBC; SEDIMENTATIO...	3	3 of 3	04/08/2017 Def...
Read MyC: Active	03/29/2017	Looney, Sam Note:	GLUCOSE BLOOD; G...	3	3 of 4	03/29/2017 Def...

← Result More Info Patient Info **Meds/Problems** Vitals/Labs My Last Note Help

Current Medications

levothyroxine (SYNTHROID) 100 mcg tablet
Take 1 tablet (100 mcg total) by mouth daily.

simvastatin (ZOCOR) 20 mg tablet
Take 1 tablet (20 mg total) by mouth nightly.

atenolol (TENORMIN) 50 MG tablet
Take 1 tablet by mouth once daily for 360 days.

Allergies Date Reviewed: 4/17/17
By: Drew Walker, MD

Reviewed

Low: Ace Inhibitors

Current Problems

Delegate your work by giving colleagues access to your In Basket

If you're going to be out of the office, or if you want support staff to help you handle your In Basket messages, you can grant them access to your In Basket.

Delegate work to support staff

If you want others to be able to see your message and follow up if needed, grant them access to your In Basket. Then, have them attach your In Basket to theirs. For example, you might grant your support staff access so they can handle normal lab results while you focus on abnormal ones. Or, you might grant access to a colleague when you're seeing patients all day without a break, so that he can address any urgent issues.

1. In your In Basket, click **Attach**.
2. In the Attach Other In Baskets window, select the **Grant Access** tab.
3. In the **User** field, enter the names of anyone who should have permission to access your In Basket and click **Accept**.



The people you grant access to must attach your In Basket to theirs to view your messages.



Remove permission to access your In Basket by deleting the user's name on the **Grant Access** tab of the Attach Other In Baskets window.

Allow colleagues to cover for you when you're unavailable

Instead of letting your In Basket messages accumulate while you're away from the office, use the Out of Contact activity to ensure that your most urgent messages are followed up on in a timely manner. For example, if one of your patients has abnormal results that need to be reviewed while you are out, another designated clinician can access your In Basket, review the results, and take the appropriate follow-up actions.

To set up this feature:

1. Click  **Out** on the In Basket toolbar.
2. Click  **New** at the bottom of the activity to add an Out of Contact occasion.
3. Select the reason you'll be unavailable and optionally add a comment.
4. Enter beginning and ending dates and times for your Out of Contact occasion.
5. Enter delegate users to cover for you while you're out.
6. Click **Accept**. Your In Basket automatically appears under the **Attached In Baskets** tab for your delegates while you're unavailable.



Your In Basket automatically appears under the Attached In Baskets tab for any pool members and individual users who are covering for you while you're out. However, your delegates do not receive any automatic notification that they will be covering for you, so you should tell them about your outage in person or by sending a Staff message.

Send yourself reminders that appear when you need them

With In Basket's time delay feature, you can send a reminder to yourself or your staff that won't show up until you need it. For example, after seeing a patient, you can send yourself a reminder to follow up with her about an upcoming surgery and set the reminder to appear a week from now.

Follow these steps to send yourself a reminder:

1. Click  **Remind Me** on the main Hyperspace toolbar.
2. Complete the reminder message with any relevant information:
 - a. Enter a subject for your message.
 - b. Enter a patient, if appropriate. If you create the reminder while you're in a patient's chart, that patient's name is automatically attached to your message.
 - c. Optionally, expand the **Flags** section and select a flag to remind yourself of the task you need to complete. Flags appear in the **Reminder** column in In Basket, so you can see what you need to do at a glance.
 - d. Optionally, expand the **Dates** section and enter a due date. You can sort your messages by due date so the tasks due soon appear at the top of your list. You can also enter a later date if you want the message to appear in your In Basket in the future.
3. When you're done, click  **Send**.

All Reminders

To: Finn-Im Achilles, MD x Show Cc

Follow up with Naomi after procedure

KING, NAOMI [299701]

This message will not be permanently saved to the patient's chart.

Colposcopy on 6/12

High Priority

Flags

Dates

Delay sending until: 6/12/2019 Time

Due on: Date Time

Expire on: Date Time

Save as QuickAction Send

Clean up your In Basket by postponing messages

If you have an important message that you want to reference at a later date, you can postpone it. A postponed message is removed from your In Basket and reappears on the date that you choose. For example, if you receive a Results message for a patient you're seeing in one week, you can postpone the message until the day of the patient's appointment. On that day, the message appears at the top of your Results folder as a convenient reminder. You can see the date of the patient's next appointment in the message report.

Follow these steps to postpone a message:

1. Click  **Properties** on the In Basket toolbar.
2. In the Postpone section, select the date on which you want the message to reappear in your In Basket and click **Accept**.



Your project team can also add a one-click option for specific types of messages.

Set Up Your In Basket for Speed

With the amount of work you do in In Basket, it's important to take advantage of its time-saving tools. The following features help you quickly find information, efficiently manage your messages, and speed up documentation.

See more info on the screen by changing your display

Some In Basket messages, like Results messages, include more information than your screen can show. The message body automatically moves to the right or to the bottom of the message list, depending on the size of your screen.

If you find that you need to scroll down to read certain types of messages, click  at the top right of the message list pane and select **Report on Right**. A longer list of messages appears on the left side of the screen, while more content from the selected message appears on the right.

Rearrange the buttons for a certain In Basket message to find what you need faster

If you find that you rarely take certain follow-up actions, you can clean up your folder toolbar and move those buttons to the **More** menu. You can also rearrange the buttons so that actions you take most often are in a prime location on the toolbar.

To do so, click  at the top right of the message list pane and select  **Configure Buttons**.

- Drag and drop the buttons in the **Toolbar** column to rearrange them.
- Select a button and click  to move it to the **Other Actions Menu** column. Anything listed in the **Other Actions Menu** column will appear under a **More** button on this folder's toolbar.

Reduce clicks by turning on AutoAdvance

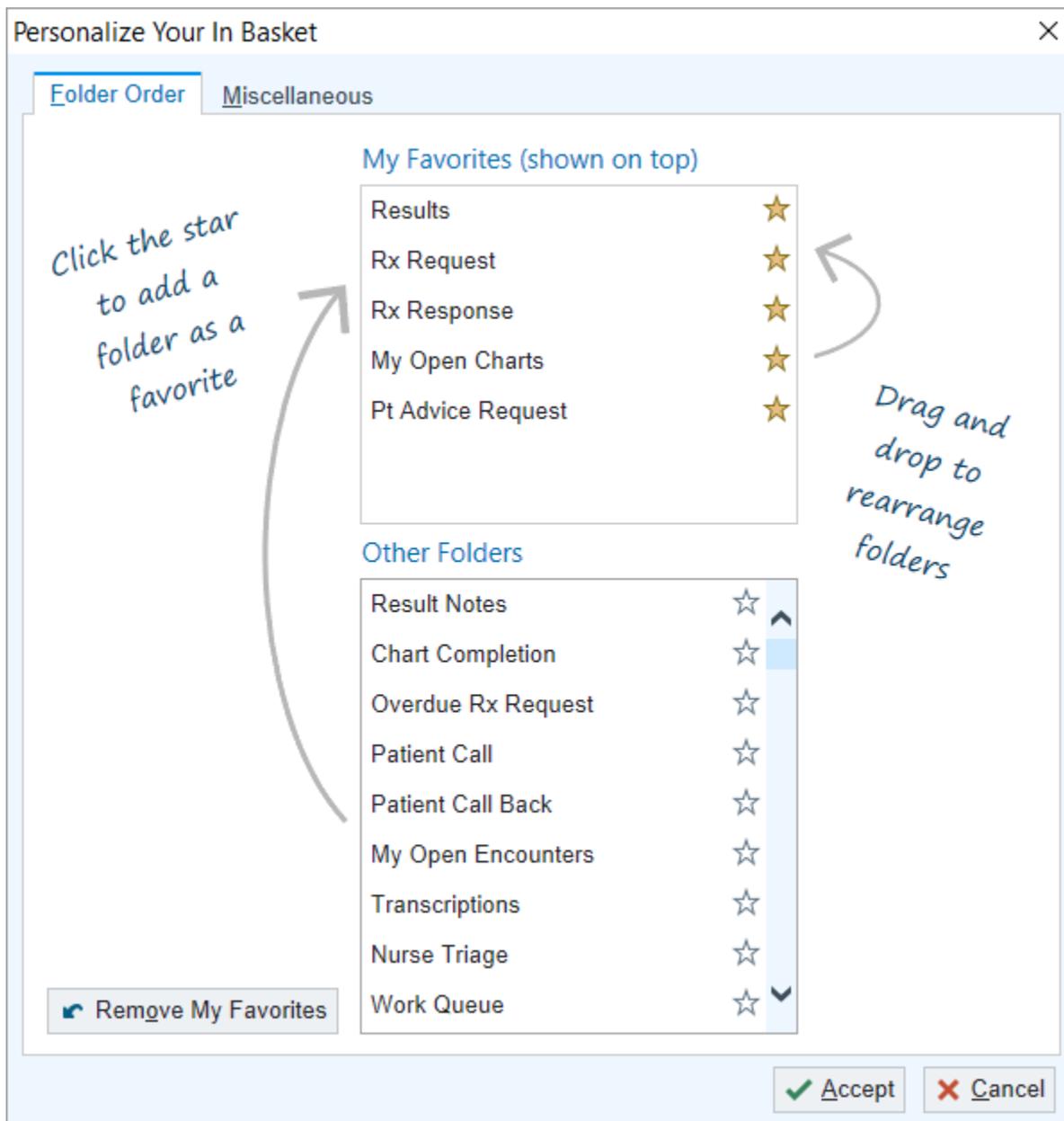
Some folders in In Basket, such as Results, are already set up to automatically advance you to the next message in the list after you complete a message. To save yourself clicks in other folders, turn on this feature by clicking  at the top right of the message list pane and selecting **Turn on Auto Advance**.

Quickly find what you need by rearranging your folders

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

To do so, click  **Personalize** on the In Basket toolbar and select the **Folder Order** tab.

- Click  next to your most frequently used folders to keep your them at the top of the list.
- After selecting your favorite folders, drag and drop them into the order that you prefer.



Complete common tasks in just a few clicks with QuickActions

If you receive In Basket messages that require routine follow-up, you can quickly complete that follow-up using a QuickAction. QuickActions are available for routine letters, result notes, QuickNotes, MyChart messages, and more. For example, in your Results folder, you might have a QuickAction called Abnormal that creates a result note using your standard text, routes it to your preferred recipients, and marks the message as Done in a single click.

- To create a QuickAction on the fly, click **Save as QuickAction** when you're writing a routine letter, result note, QuickNote, MyChart message, or Staff message.
- To create a QuickAction at any time, click the arrow to the right of the  **Manage QuickActions** button on the In Basket toolbar and select the type of QuickAction you want to create.



Include SmartLinks in your text so your message pulls in data for the associated patient when you use a QuickAction.

The screenshot displays a mobile application interface. At the top, there is a navigation bar with several icons and labels: a lightning bolt icon followed by 'QuickActions', a close icon followed by 'Done', a checkmark icon followed by 'Reviewed', a plus icon followed by 'Take', a document icon followed by 'Result Note', and a chart icon followed by 'Chart'. Below this bar, a dropdown menu is open, showing three options: '1 Call patient about abnormal result', '2 Normal', and 'Manage QuickActions'. To the right of the dropdown, there are three tabs: 'Patient Info', 'Meds/Problems', and 'Vitals/...'. Below the tabs, there is a green button with a person icon and the text 'Basic metabolic panel'. At the bottom left, the text '39 y.o., 03/14/1979' is visible.