

# E-Referral Interim Solution: Managing Provider Advice In-Basket Pools

1/15/2021

**HAWAI'I  
PACIFIC  
HEALTH**

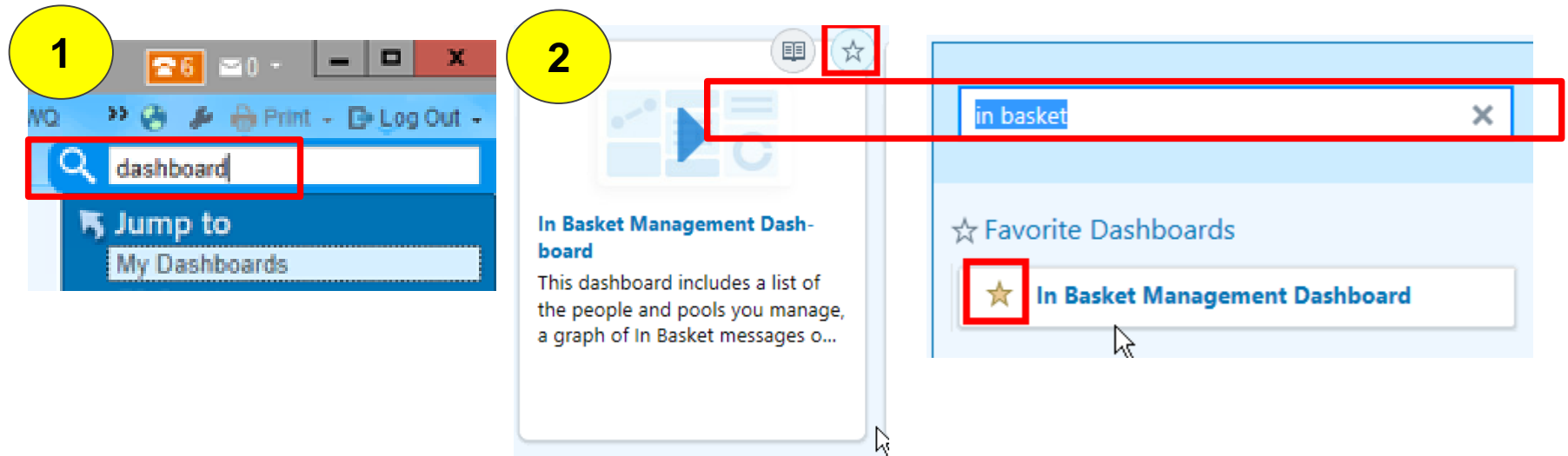
KAPI'OLANI  
PALI MOMI  
STRAUB  
WILCOX

# How to Add Users to an In Basket Pool

## 1. Log into Epic and Navigate to My Dashboards

- You can click the Search magnifying glass and type 'dashboard'
- In the Search for Reporting Content box, type "In Basket" and select "In Basket Management Dashboard".

## 2. Click the "star" icon to mark it as a favorite dashboard.



# How to Add Users to an In Basket Pool (cont.)

3. In the In Basket Management Dashboard, click “Configure which pools and people you manage”

The screenshot displays the 'In Basket Management Dashboard' with three main sections: 'People with Old Messages', 'Pools with Old Messages', and 'Folders with Old Messages'. A yellow circle with the number '3' highlights the 'Configure which pools and people you manage' link in the 'Pools with Old Messages' section. A red box highlights the same link in the 'Folders with Old Messages' section.

People with Old Messages	Old
Miguel, Sheldeen A	3,368
Fuentes, Catherine, RN	1,888
Chai, Cheri	1,289
Badua, Norlin	984
Yoshida, Mary, RN	617
Other People	1,538

Pools with Old Messages	Old
Sch Authorization Department Pool	129
Sch Telehealth Clinic Staff (No One Signed In)	1

Folders with Old Messages	Old
Patient Calls	3,441
My Open Encounters	2,405
AC SIGNIFICANT WEIGHT CHANGE	919
Rx Auth	580
Messages	414
CC Charts	350
Epic Updates	346
Covered Work	323
Pt Schedule Request	280
Pt Advice Request	168
Other Folders	591

# How to Add Users to an In Basket Pool (cont.)

- In the Pools I Manage box, click the blank line below the list of pools that appears and type the name of the pool you'd like to add
  - You can search for "Provider Advice" or type the name / pool ID
- With the pool selected, click the Manage Pool button on the bottom of the screen
- In the Add User field, type the name of the individual you'd like to add to the pool and click Add

**4**

**6**

Add user: Enter name of user (Alt+Shift+U)

**Pools I Manage**

Pools

- SCH AUTHORIZATION DEPARTMENT POOL
- SCH TELEHEALTH CLINIC FRONT DESK
- SCH TELEHEALTH CLINIC STAFF

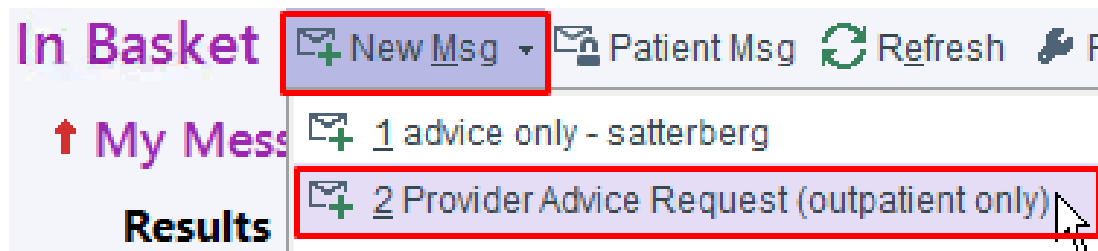
%	Registry Name	Registry ID
<input type="checkbox"/>	PROVIDER ADVICE CARDIOLOGY KMC	80072
<input type="checkbox"/>	PROVIDER ADVICE CARDIOLOGY SMC	80073

# Appendices

# How Providers Will Be Instructed to Send IB Messages to the Provider Advice Pools

Provider Advice pools are intended for clinical and non-urgent matters.

1. Log into Epic and navigate to your In Basket
2. Click the downward facing arrow in the New Msg icon and select the “Provider Advice Request (outpatient only)” Quick Action button
3. A message will be created with the following defaults:
  - Marked as High Priority
  - Subject Line will read “Advice Request”
  - Response due 3 days from today



# How Providers Will Be Instructed to Send IB Messages to the Provider Advice Pools (cont.)

4. Update the message with the following information:
  - “To:” field – enter the HPHMG Specialty Pool or HHP provider you would like to send the message to.
  - “Patient” field – enter the patient’s MRN
  - In the body of the message, please provide a explanation of the situation and advice you are seeking
  - Click Send

# How Providers Will Be Instructed to Send IB Messages to the Provider Advice Pools (cont.)

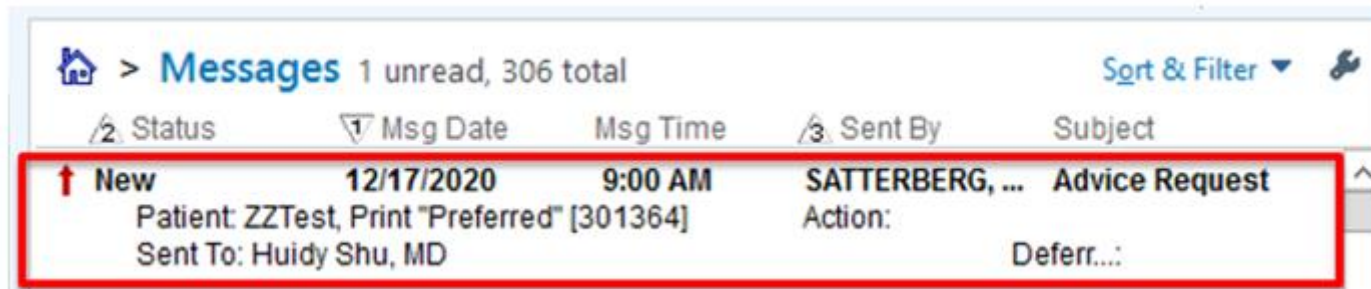
- Items highlighted in yellow below are automatically included in the In Basket message when using the Quick Action button. Items highlighted in red below must be updated prior to sending. Items

The screenshot displays a 'Messages' interface. At the top, there are two priority buttons: 'High Priority' (highlighted in purple) and 'Low Priority'. Below these are three input fields: 'To:' (highlighted in red), 'Advice Request' (highlighted in yellow), and 'Patient' (highlighted in red). The 'Patient' field includes a search icon and the text 'Current Patient'. A toolbar below the fields contains icons for undo, redo, help, and a plus sign, along with a text input 'Insert SmartText' and a '100%' zoom dropdown. The main message body is a large empty text area (highlighted in red). On the right side, there is a sidebar with sections: 'Call Info' (with a 'Phone Number' field), 'Flags' (with checkboxes for 'Call with results', 'Call patient', 'Patient reminder', 'Schedule follow-up a', 'Write letter', and 'Personal reminder'), and 'Dates' (with 'Delay sending until' and 'Due on' fields; the 'Due on' field is highlighted in yellow and shows '12/20/2020').



# How To View Messages in the Provider Advice In Basket Pool

1. Log into Epic and navigate to your In Basket
2. Click the Messages option on the left-hand side of the screen
3. Search for any message where the Subject contains “Advice Request”
  - Tip: Click the “Subject” title at the top of the screen to quickly sort your messages



# How To View Messages in the Provider Advice In Basket Pool (cont.)

4. Click a message to view it. You may notice a “Due: In 3 days” notice appears in the top right-hand corner of the message
5. Click either the Reply or Reply All icons in the message and type a message to respond
6. On day 3 after receipt, the message will be highlighted in red as a gentle reminder to respond.
  - If you have responded, please click the “Done” icon within the message to remove it from the In Basket Pool
  - The red highlighting will only apply if the message was created using the Provider Advice Quick Action button or if the user set a specific due date for response

↑ Read Msg:	12/15/2020	4:44 PM Sent To:	Advice Only	ZZTest, Print "Prefe... Def...:
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