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

1/15/2021

How to Add Users to an In Basket Pool
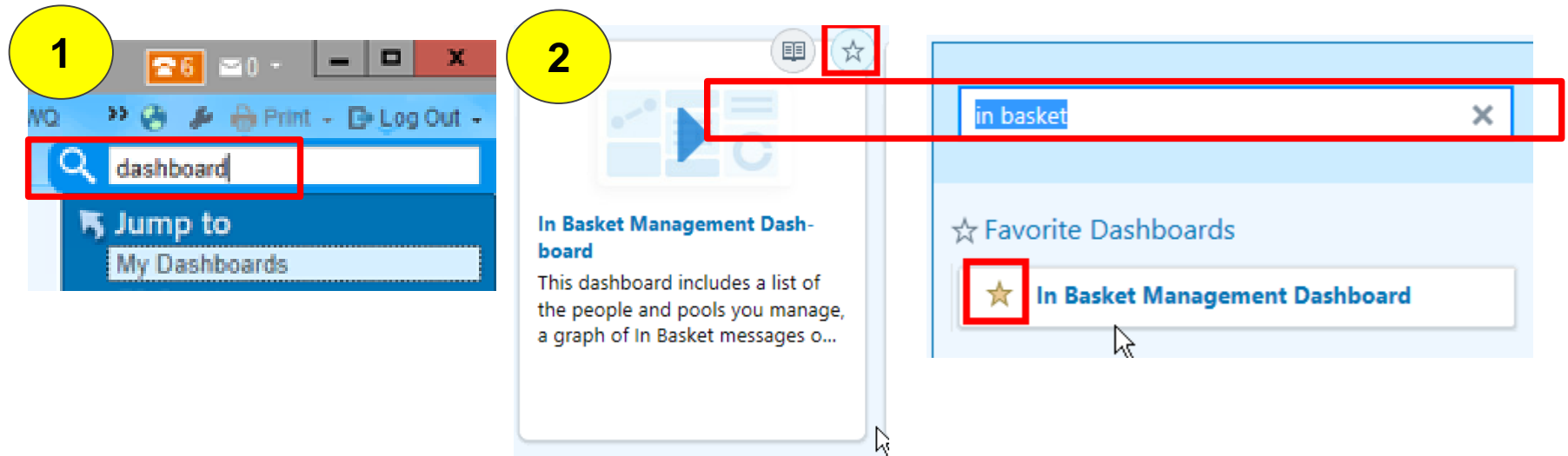
1. Log into Epic and Navigate to My Dashboards
   - You can click the Search magnifying glass and type 'dashboard'
   - In the Search for Reporting Content box, type "In Basket" and select "In Basket Management Dashboard".
2. Click the "star" icon to mark it as a favorite dashboard.

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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"

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

4. 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

5. With the pool selected, click the Manage Pool button on the bottom of the screen

6. In the Add User field, type the name of the individual you'd like to add to the pool and click Add

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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

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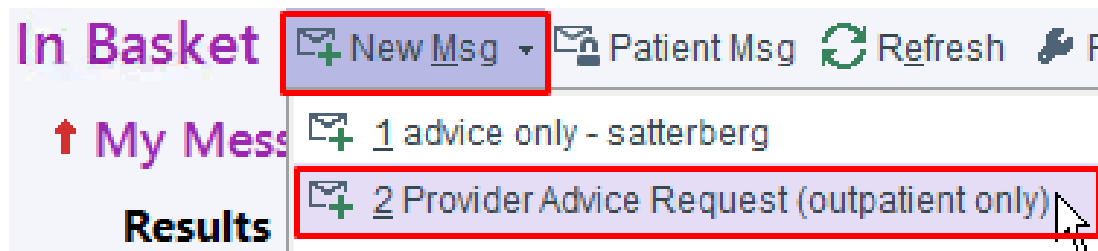
How Providers Will Be Instructed to Send IB Messages to the Provider Advice Pools (cont.)

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

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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

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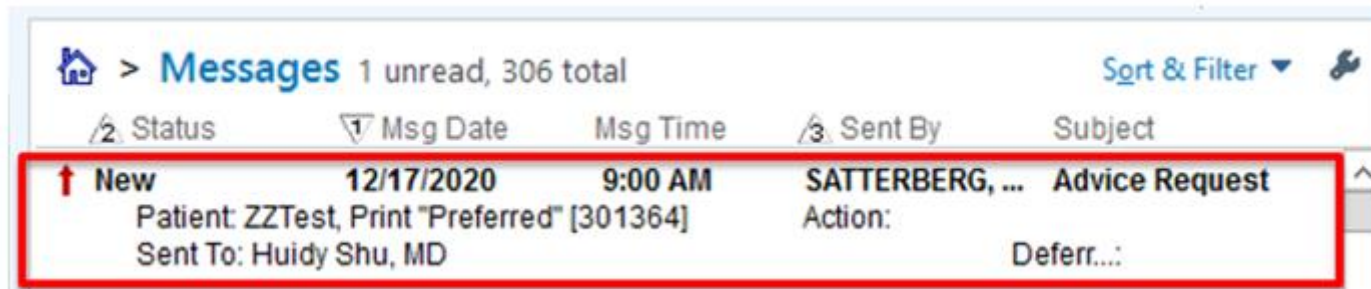
How To View Messages in the Provider Advice In Basket Pool (cont.)

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...: |