EpicEdge Tips & Tricks

In Basket

In Basket contains staff messages and system-generated messages. Users may send Messages to any staff that are part of the Tufts Medicine network. You can view your In Basket by clicking the In Basket task. In Basket allows you to see a menu of In Basket folders with unread messages and select the folder you want to open. Each part of In Basket has a different purpose, as explained below.

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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.

Refresh In Basket

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

Note that in the Remote Client, In Basket will not automatically refresh; you must sync to send and receive messages.

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. Enter recipients for the message. Use the format Last name, First name. Recipients you often use appear as you begin typing their names.

> ⓘ Completion matching is a fast way to locate recipients. For example, enter "smi, ale" to locate Alexander Smith.

3. Optionally, designate a priority for the message by clicking the **High Priority** or **Low Priority** button. This lets recipients know if your message needs immediate attention.
4. Complete or edit any other fields, depending on the type of message you are sending.

> ⓘ If the message is related to a patient, and you had an In Basket message already selected about that patient, or have their chart open, click 🛈 **Current Patient** to quickly add them to the **Patient** field.

5. Enter your message in the main field.
6. Add flags to your message, if appropriate. Flags, such as "Call patient" or "Schedule follow-up appointment," quickly alert recipients to vital information about your message.
7. Click ✈ **Send** to send your message or click ✖ **Cancel** to discard it.

> ℹ️ To send the message later, expand the **Dates** section. Enter a future date in the **Delay sending until** field. 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.

Note: Only Recipients that are part of the Tufts Organization will appear in the In Basket Directory to send a message to.

Remove a message from your In Basket

When you're finished with a message, click ✔ Done **Done**. The next time you sync and In Basket refreshes, the message is removed. When you mark all the messages in a folder as Done, the folder disappears until you receive another message of that type.

Some In Basket messages are associated with tasks that you need to complete before they can be marked as Done. For example, you can't remove a My Open Charts message from your In Basket until you close the associated encounter. Often, those types of messages don't have a **Done** button. Instead, completing the appropriate task removes the message from your In Basket.

> ℹ️ If you aren't sure how-to follow-up on a message, check the Help report. Refer to [Why did I receive this message? What can I do with it?](#) for more information.

I accidentally marked a message as Done. Can I undo it?
Yes. If you haven't synced your In Basket yet, right-click the message and select **Mark as New**.
If you've synced and the message is already gone, select the **Completed Work** folder. Messages you've completed in the last 30 days appear here. Select the folder and message you need. Then, you can follow up on the message or click **Move to My Messages** to work on it later.

> ℹ️ You can also search for old messages. Refer to [Search for messages in your In Basket and save your searches](#) for more information.