

In Basket Optimization

NACHC Epic User Group

6/1/22

About Us

- Multi-specialty FQHC in Tucson, AZ
- 14 clinic sites
- 300+ providers
- Live on Epic 11/1/21



In-Basket Taskforce

- Clinical Informatics
- Ambulatory IT analysts
- Operations leadership
- Nursing leadership
- Clinicians
- Pharmacy
- IT Training team

Key Priorities

- Patient safety
- Turn-around time/patient satisfaction
- Provider workload - if task can be done by support staff, don't have providers doing it
- Maximize efficiency for providers and staff
- Use MyChart as much as possible, but also need to account for those not on it
- Stick to implementation design decisions unless compelling reason to change

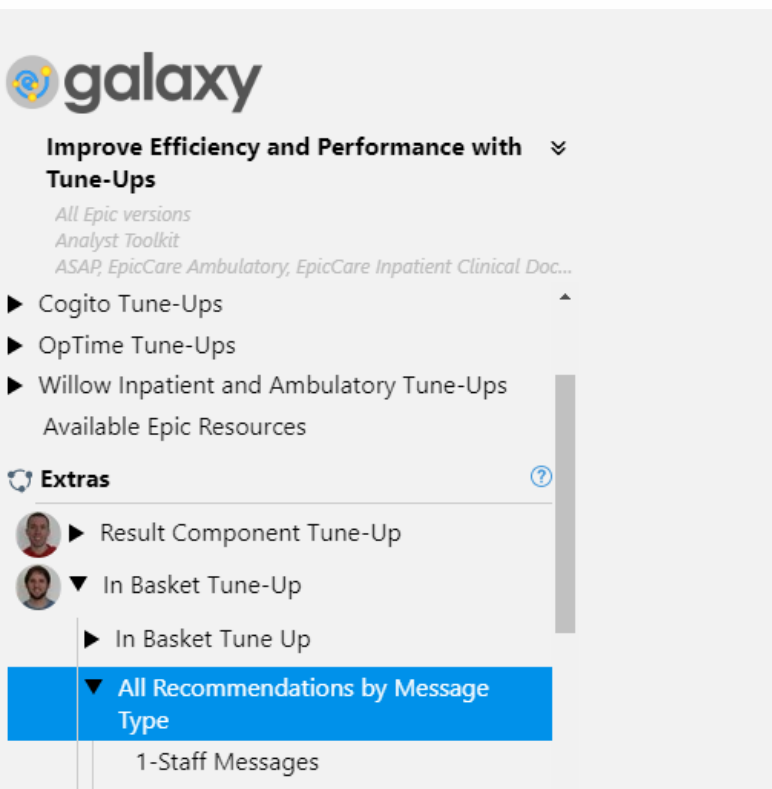
Early Lessons Learned

- In Basket is complicated!
- Providers and staff receiving messages they didn't know what to do with – are they even actionable?
- Rapid divergence of workflows among staff after initial training

Phase 1 Goals

- Understand all the various inputs and current routing structure for each
- Identify current areas of difficulty - technical vs workflow?
 - Design tweaks where needed
 - Standardize workflows
- Develop recommendations:
 - Prioritize greatest pain points
 - Focus on some quick-wins
- Get buy-in from stakeholders
- Implementation/training

Figuring out message types



The screenshot shows the Galaxy interface. On the left, there's a sidebar with the 'galaxy' logo and a section titled 'Improve Efficiency and Performance with Tune-Ups'. Below this, there are links for 'All Epic versions', 'Analyst Toolkit', and 'ASAP, EpicCare Ambulatory, EpicCare Inpatient Clinical Doc...'. A list of Tune-Ups is shown: 'Cogito Tune-Ups', 'OpTime Tune-Ups', and 'Willow Inpatient and Ambulatory Tune-Ups'. Under 'Available Epic Resources', there's an 'Extras' section with a question mark icon. It contains 'Result Component Tune-Up', 'In Basket Tune-Up', and 'In Basket Tune Up'. The 'All Recommendations by Message Type' option is highlighted in blue, and '1-Staff Messages' is listed below it.

All Recommendations by Message Type [🔗](#)

Overview:

This section contains all of the recommendations which we include in the In Basket Tune-Up.

Reminder that the Tune-Up will:

1. Search to check if you are meeting the recommendations (where possible)
2. Gives you context on how many messages of a given type are sent (from your signal data) to providers

This helps you prioritize your review. Therefore, running the Tune-Up is still the recommended way to review your organization specific recommendations. That being said, it is still valuable to have this list searchable and all in one place in Galaxy!

1-Staff Messages [🔗](#)

What is it?	Recommendation	Impact Area:
Staff Messages are user triggered messages similar to email.	<p>Routing Recommendation:</p> <p>Staff Messages should be sent between providers and staff for non-urgent communication that does not need to be saved to a patient chart. Providers can also send Staff Messages to themselves as reminders.</p> <p>Setting Recommendations:</p> <p>Staff Messages should be listed as an Always Sendable Message Type in Epic-wide Settings. This setting gives all providers and staff with In Basket access the ability to send and receive staff messages. See Determine Which Types of Messages a User Can Create for details.</p>	All Users

Initial Quick Wins

- Patient Advice Requests:
 - Route to provider pool instead of providers
- Care Everywhere ADT messages:
 - Route to Discharge Care Coordination pool instead of providers
- Patient Questionnaires after a COVID testing visit:
 - Turn off routing

Initial Quick Wins (cont.)

- Rx Response:
 - Turn off auto-default sender into Recipient field
- Appointment Notification:
 - Turn off routing to providers
- Update default In Basket folder order for staff

Initial Workflow Interventions

- MA Best Practice Guide
 - Using Quick Notes
 - “Teeing up” med refills
 - Patient requests for lab results/referrals
 - Eliminate unnecessary routing back to provider
- LPN Best Practice Guide
 - Med refill protocol/med reconciliation
 - Triage notes
 - Nurse visits needing input from provider
 - INR visits

Phase 2 Goals

- Data-driven process for monitoring progress and identifying additional opportunities:
 - Signal
 - In Basket Tune-up Report
- Focused interventions with individual providers
- Ongoing training to solidify workflow improvements

In Basket Tune Up Report

In Basket Tune Up - 2022-03-30 - 2022-04-29

Bucket	Quick Win?	Message Type	Your Setup	Signal Percentile	
System	Yes	Appointment Notification - 46	Review Recommendations	Bottom 5%	Jump to Appointment Notification
System	Yes	IP ROUTING - 500	Following Recommendations	Bottom 5%	Jump to IP ROUTING
System	Yes	Medication Cancellation - 271	Review Recommendations	Bottom 25%	Jump to Medication Cancellation
System	Yes	CE Event Notification - 720	Review Recommendations	Bottom 25%	Jump to CE Event Notification
System	Yes	Addendum - 34	Following Recommendations	Bottom 50%	Jump to Addendum
System	Yes	Media Manager - 410	Following Recommendations	Bottom 50%	Jump to Media Manager
System	No	Incomplete Note - 40	Not Following Recommendations	Bottom 10%	Jump to Incomplete Note
Team	No	Patient Calls - 7	Review Recommendations	Bottom 50%	Jump to Patient Calls
System	No	Open Encounters - 26	Review Recommendations	Bottom 50%	Jump to Open Encounters
Team	No	Rx Response - 33	Review Recommendations	Bottom 50%	Jump to Rx Response
Team	No	Result Notes - 44	Review Recommendations	Bottom 50%	Jump to Result Notes
Other	No	Help Desk - 84	Review Recommendations	Bottom 50%	Jump to Help Desk
Team	No	Referral Message - 216	Review Recommendations	Bottom 50%	Jump to Referral Message
Other	No	Refill Errors - 241	Review Recommendations	Bottom 50%	Jump to Refill Errors
Other	No	E-Prescribing Errors - 251	Review Recommendations	Bottom 50%	Jump to E-Prescribing Errors
Patient	No	Patient Questionnaire Submission - 644	Review Recommendations	Bottom 50%	Jump to Patient Questionnaire



ReadMe

IBBR Overview

Feedback

Message Type Review

Message Types to Expire

Message Volume Chart

User Data

Volume Data

De ...



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In Basket Tune Up Report

CE Event Notification

Select Message Type

[Back to Overview tab](#)

Epic's Recommendations

[Message type recommendations found in Galaxy](#)

Additional Information

[Setup and Support Guide information on this message type](#)

Your Organization's Setup

Your organization has configuration in Document Exchange Configuration items that affect this message type. Items that affect this message type are DXC 400, 401, 402, 410, 411, and 420.

In Basket Tune Up Report

720-CE Event Notification

What is it?	Recommendation	Impact Area:
<p>CE Outside Events messages inform you that an event has occurred for a patient that participates in Care Everywhere. This message is sent to the In Basket of the patient's general PCP at any organization that has a Care Everywhere ID for that patient record. Each of the following Epic events triggers an In Basket alert message to the patient's physician: Closing an Encounter, ED Visit, ED Dismissal, HOV Complete, Inpatient Admission, and Inpatient Discharge.</p>	<p>Routing Recommendation:</p> <p>Regulatory requirements govern when and to whom these messages are sent. Information on these requirements can be found in the CMS Patient Event Notifications Setup and Support Guide.</p> <p>That being said, our general recommendation for informational messages, such as these, is to limit routing messages to In Basket only when the messages are useful and relevant to the recipient.</p> <p>Work with your Care Everywhere TS to determine an appropriate configuration for your organization, but it is common for organizations to only route event notifications to In Basket for certain event types (such as admissions and discharges) and only send messages for patients who were seen recently by their PCP.</p> <p>At a minimum, we highly recommend:</p> <ul style="list-style-type: none">• NOT routing these messages for Closing an Encounter.• In an ED context, we recommend only routing these messages for ED Dismissal (and not ED Visit).• In an IP context, we recommend only routing these for Inpatient Discharge (and not Inpatient Admission).• Additionally, we generally do not recommend routing these messages for Ambulatory or Hospital Outpatient Visit encounters. <p>Settings Recommendations:</p> <ul style="list-style-type: none">• Various Care Everywhere settings control whether messages are routed to In Basket for these events.<ul style="list-style-type: none">◦ For Care Everywhere event notifications, the settings on the Event Notification Settings screen in Care Everywhere configuration are used. To minimize these messages, configure a CER rule and plug it into I DXC 411 in your DXC 1 record.◦ For CMS event notifications, the Direct Routing Table in Care Everywhere configuration is used. To minimize these messages, configure the table to apply an action of "Mark as Routing Not Needed" to certain event types.<ul style="list-style-type: none">▪ Starting in May 2022, the Direct Routing Table can also be used to manage your Care Everywhere event notifications.• Expire messages (I HIS 2650) to prevent unnecessary accumulation over time. As these are mainly informational, our recommendation is to expire after 90 days.• With the Epic November 2021 release, it is possible for users to turn off some event notifications in In Basket User Preferences. This development is also in progress via SU to May 2021 and August 2021. The ability for end users to do this can be disabled at the system or Security Class level. We do NOT recommend disabling this feature.	Providers

Signal

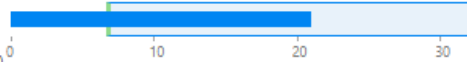
In Basket Messages Received per Day

21

IB msgs

-1.5 IB msgs (7 days)

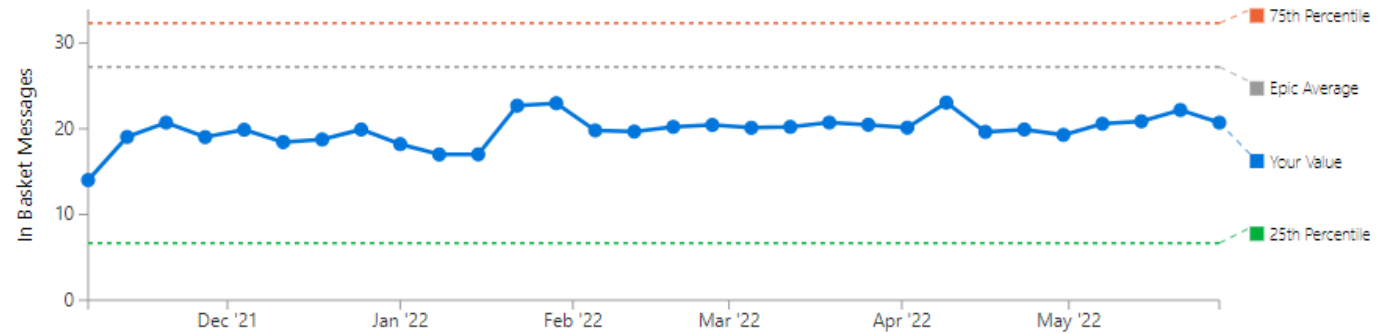
Middle 50%



[Metric Description](#)

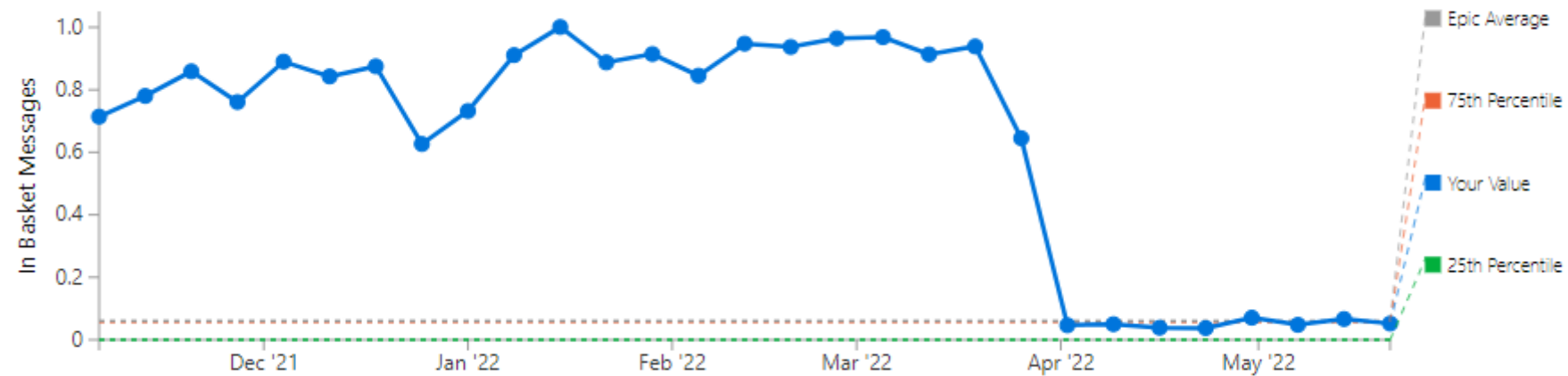
[Download Most Recent Data](#)

[Download Historical Data](#)



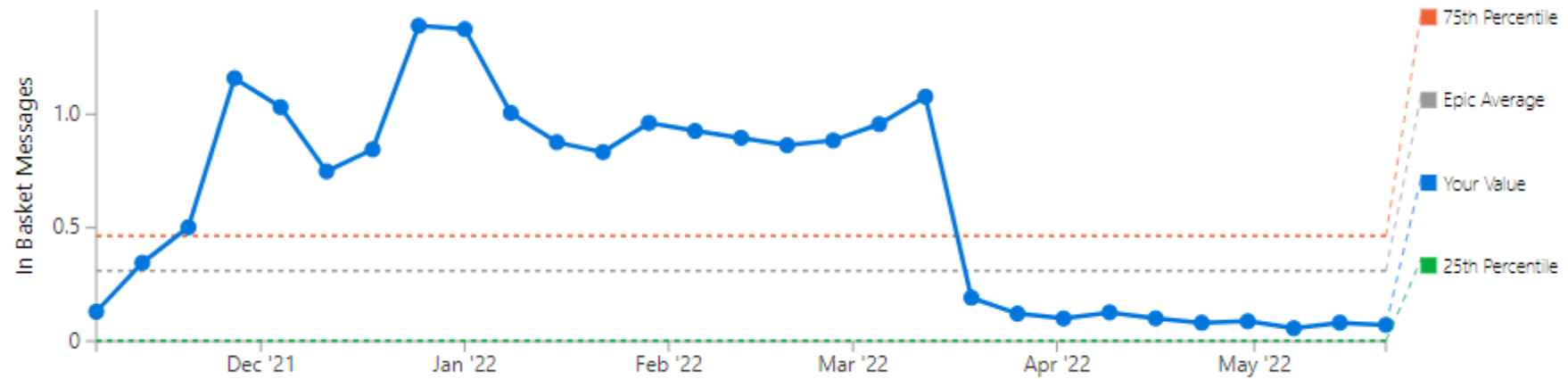
Wins

Appointment notification



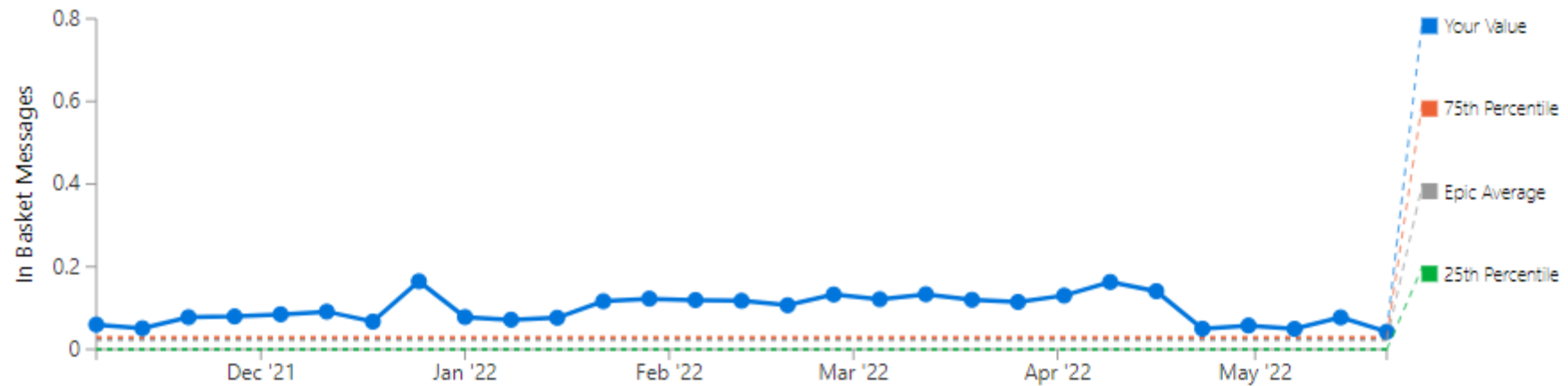
Wins

Rx Response



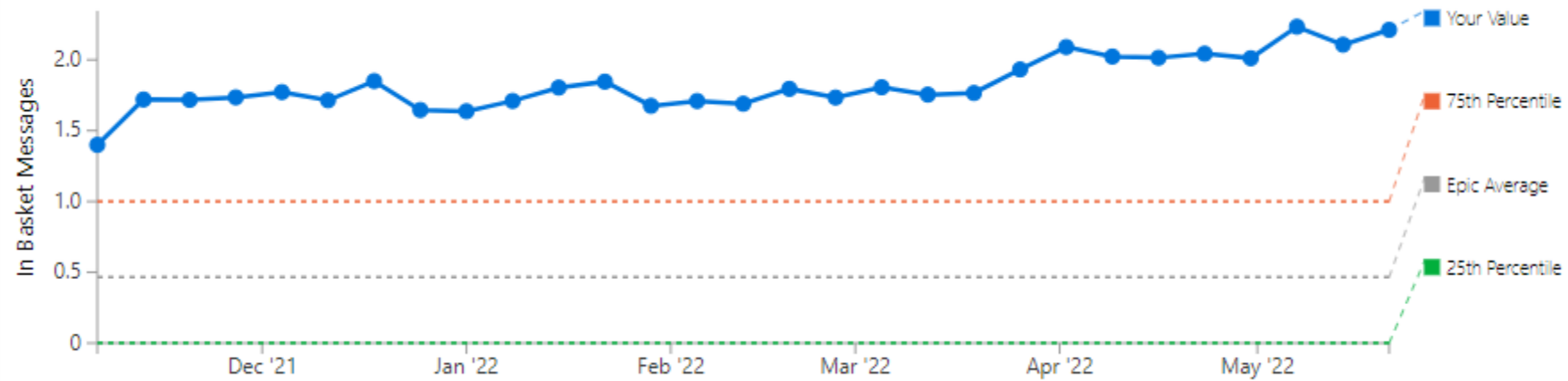
Wins

Med Cancellation



Opportunities

CE Event Notifications



Opportunities

- < 50% of providers using QuickActions
- Developed set of system QuickActions for Results and Refills
 - Training underway

Lessons Learned

- Strong partnership b/w Clinical Informatics and Ambulatory IT analysts is key
- Epic Ambulatory TS is great resource
- Make use of message type auto-expire settings

