

## Minutes

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### Agenda Item

Presenters: Steering Committee

Welcome & Introductions

### Discussion:

User Group Meeting Agenda

- Steering Committee members gave introductions.
- NACHC highlighted upcoming events and opportunities to connect with your colleagues including CHI on August 26<sup>th</sup> and 27<sup>th</sup>.
- Please take a moment to complete our needs assessment [here](#).

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### Agenda Item: Epic In Basket Management and Updates

Presenters: El Rio Health, OCHIN, Denver Health, and Epic

Discussion: See slides for further highlights.

#### Group Discussion

#### El Rio Health:

- Have direct enterprise license Epic
- El Rio Health found that after 2 weeks of being live on Epic providers felt overwhelmed by the number of In basket messages they were receiving
- Pulled together a multifunctional taskforce to identify key priorities.
- Early Lessons Learned:
  - In Basket is complicated
  - Providers and staff were unsure on what to do with all the messages
  - Staff all had different workflows
- Used a galaxy guide on All Recommendations by Message Types.
- Opportunities:
  - Strong partnership with clinical informatics
  - Make use of message type auto-expire settings

#### OCHIN:

- Completed an In Basket Management Improvement Project in 2020.
  - For Outside Event Messages and MyChart Advice requests, triage pool of care team members.
  - For refill requests send directly to prescribing provider or PCP.
  - Send overdue results send to clinical support staff or lab pool.
  - For scanned documents, sort by document type and attach to orders where relevant, or forward to key staff.
  - Have a pool for clinical support staff or labs.
- In Basket Dashboard in Hyperspace, recommend Signal to monitor efficiency and provider reduction.

#### Denver Health:

- Have direct enterprise license from Epic
- Provider's time in In Basket has increased 30% in the last 3 years.
- Since COVID there has been an increase in patient messages through patient portals, which end up in In Basket. About 1:10 patients with an active MyChart send a message.
- 6 Steps taken:
  - Auto Delete Messages

- Try to stabilize or reduce the number of In Basket Messages.
  - If a message isn't actionable don't show it.
  - Avoid duplicate messages
  - Enable direct scheduling via MyChart.
- Utilize Standard Pools.
  - Try to simplify the naming convention.
  - Make it obvious who should log into the pool and what they should do.
  - Standardize the work. For instance use a single documentation template.
  - Use Signal
  - Use report dashboard, enable the In basket Message Management dashboard.

#### **Epic:**

- With the Feb. 22 Update: See Screenshots
  - Reach out to IT team to know when the upgrade will take place at your instance.
  - Will see task counts, for both your In Basket and what you are attached to.
  - New search functionality, and custom filters for any columns.
  - Reply/Forward and Like Email
  - Personalized Efficiency Tools.
- Future Vision:
  - Working to improve Relevancy, Consistency, Efficiency, and Assistance.
- Additional Resources:
  - If you are interested in our current options around managing Patient Medical Advice Requests, our Taming the In Basket series on UserWeb has some great options and we will be hosting Build Along sessions in the near future: <https://userweb.epic.com/Webinar/View/8348/Taming-the-In-Basket-with-Epic-MyChart-Messaging-Whats-Now/>
  - If your Providers would like to learn from Epic's experts on In Basket efficiency (and get CME for it), follow this link on UserWeb: <https://userweb.epic.com/Thread/113141/Efficiency-Hour-Sessions-Master-Thread-Star-Me/>

#### **Future Meetings**

- TBD