In Basket

Viewing Messages

In Basket is a quick and easy way to communicate with your colleagues. From here, you can view and sort messages, search for messages based on several criteria, and respond to your messages.

Select the In Basket tab to access your messages. Folders that group types of messages appear in the left pane. For example, you might see CC'd Charts or Referral Authorization folders. If you have new messages, the folder title appears in bold, and the number of new messages appears in parentheses next to the folder name. If you have a new high-priority message, the folder appears with a red arrow.

View a message

1. Select the folder for the type of message you want (for example, Result Notifications).
2. Select a message to read its contents.

Search for a message

1. Click 🔍 Search
2. Enter as many search criteria as you want and click ✔ Search. You can search by patient, message type, status, recipient, priority, date, or any combination of these.
3. To return to your normal In Basket view, click My In Basket.

Print multiple messages at once

If you are working with a paper system, you can print multiple In Basket messages to keep on file. Note that you can print multiple messages at once only for certain message types.

1. Select the folder containing the messages that you want to print and select the check boxes next to the messages that you want to print.
2. Click 🖨 Print Selected.
3. Select the right print settings and print the messages.

Sending Messages

In Basket is a communication hub where you can send and receive secure messages like email. Messages are sent to individual recipients or to several recipients grouped in a class or a pool. You can also associate a patient with the message using the Patient field on the message form so that the recipient can refer to the patient's chart.

Send an In Basket message

1. Select the In Basket tab, click the arrow next to 📑 New Msg, and select the type of message you want to send.
2. In the To field, completion match on the name of the person or group to whom you would like to send your message. To see a list of all possible recipients, click 🔍
3. Enter a brief subject in the Subject or Summary field.
4. If you are sending a message regarding a patient, either click Use <patient name> to pull in the patient's name, or search for a different patient. This attaches the patient's name to the message.

5. **Complete any other required fields.**
6. **Enter your message in the Note field.**
7. **When you are finished, click** ✔ **Send Message.**

Reply to or forward a message

Click a message to select it.

- To reply to a message, click 📩 **Reply.**
- To forward a message, click 📩 **Forward.**

Note: Reply and Forward options might not be available depending on the message you've received.

View messages you've sent

1. **Select the In Basket tab and click My Out Basket.**
2. **Select a message type and then select a particular message to view it.**
3. **To return to your In Basket, click My In Basket.**

Respond to a service request - *Link Requestors do not have this access

1. **Open your Service Requests In Basket folder.**
2. **Review each message.**

- Click **Accept** or **Decline** depending on whether you can provide the requested service. If you decline, you're prompted to enter a reason for declining the request.
- If you need more information before you decide, click **Reply** to send a message back.
- Tip: set up text notifications in the chapter Updating Program Settings

Triaging Referrals

You can triage referrals that are sent to your organization to ensure that the correct people can act on them.

Triage a referral

1. **Open your Referral Triage In Basket folder.**
2. **Each message corresponds to a referral request. Select a message to view details about the request.**
3. **Click one of the following to triage the referral:**

- 📋 Accept
- 📋 Reject
- 📋 Redirect

4. **After you choose an option to triage the referral, document information about your decision. For example, you can select a reason for rejecting a referral, or redirect a referral to a specific location provider, department, or specialty. When you accept or reject a referral, the referring organization is notified of your decision and can see the information you documented.**