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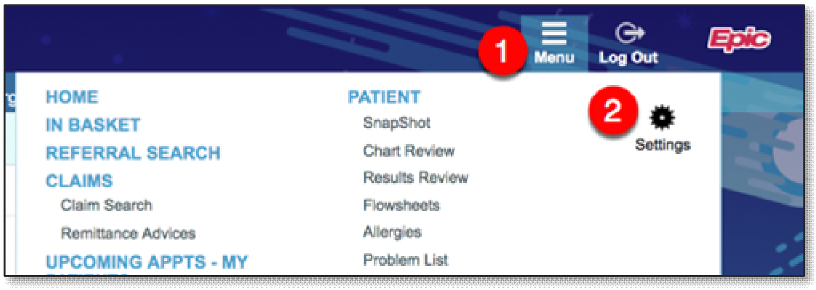
The In Basket is a tool to help organize and coordinate clinical workflows requiring communication with others. It organizes messages to help prevent missed or important communications. This job aid covers where you can change In Basket settings and how to use the In Basket.

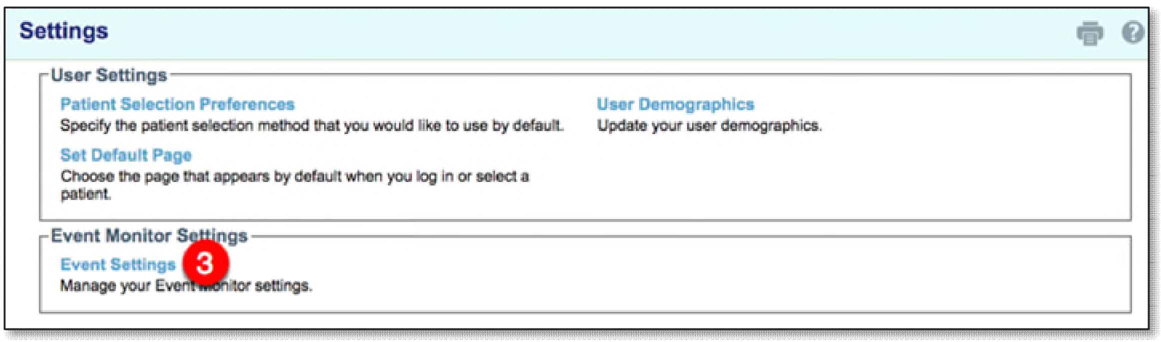
In Basket Settings

Change your In Basket settings so that messages are handled by you only or allow other users in your group to handle your messages.

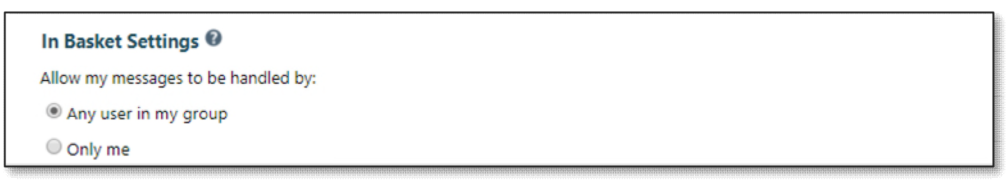
1. Click the **Menu** button in the top menu.
2. Click the **Settings** icon.



3. Click **Event Settings.**

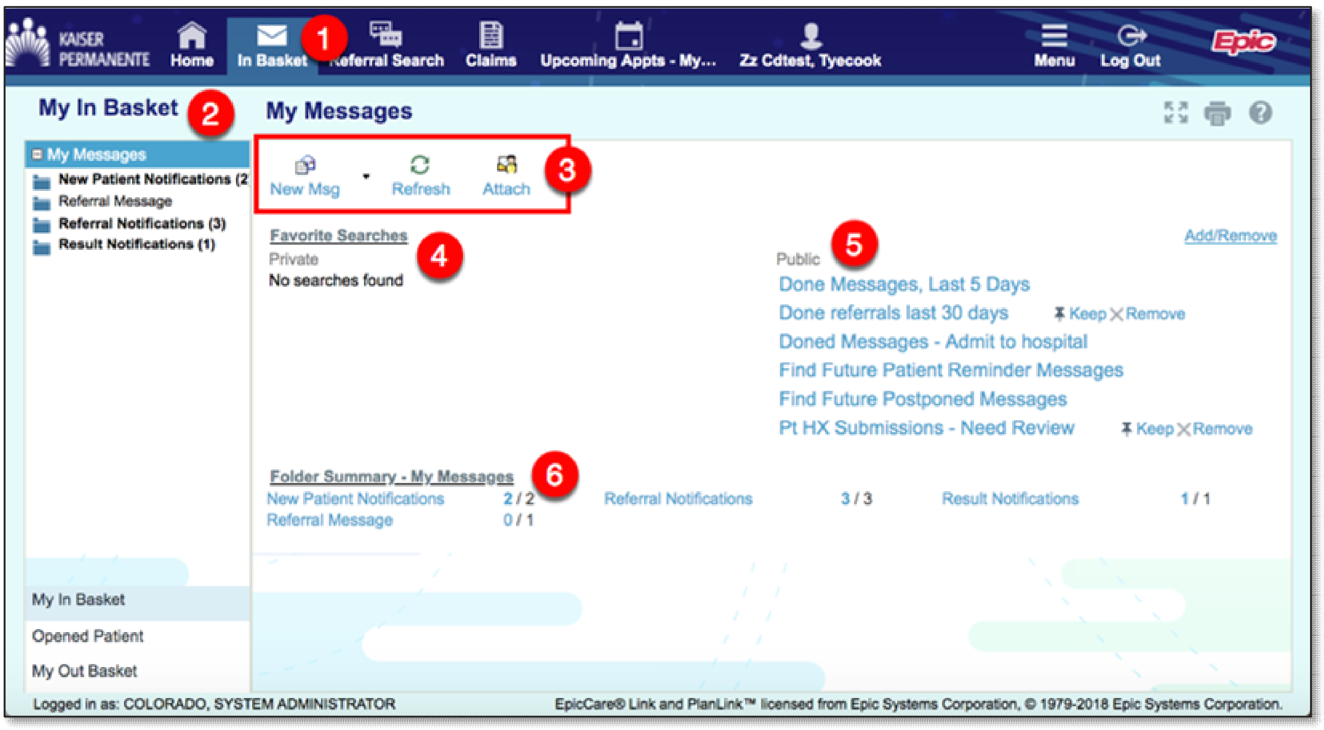


4. Scroll down to **In Basket Settings**
   - **Any user in my group**. This setting allows any user who receives the same patient notification you do to mark that message complete. The message is then marked as done in your In-Basket folder, regardless of whether you have viewed it yourself.
   - **Only me.** This setting means that you have sole responsibility for processing those messages and marking them complete.

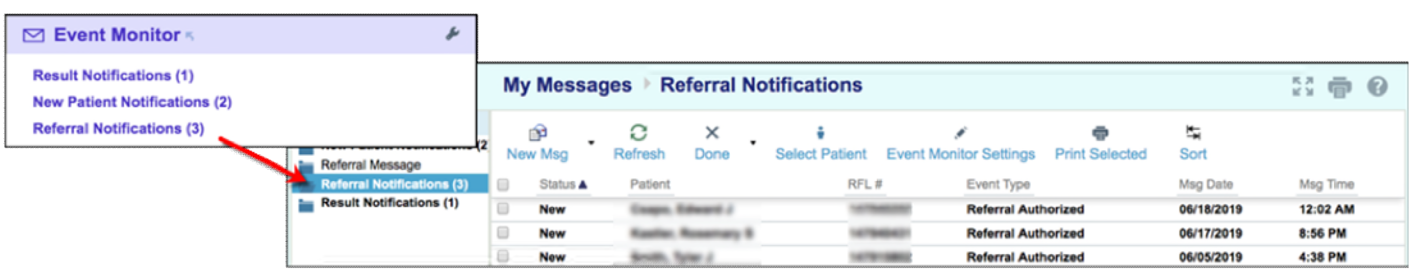


How to Use the In Basket

1. Click the **In Basket** button in the top toolbar.
2. The **My In Basket** column on the left side shows all of the current message types under **My Messages.**
   - If there are new messages in a folder, the folder appears in bold font with the number of new messages in parentheses.
   - At the bottom of the column there are buttons for your **Out Basket**, return to **My In Basket**, **Opened Patients**, any **Attached In Baskets** that you are attached to.
3. The activity toolbar is where you can go to:
   - Create a **New Message**
   - **Attach** to add or remove shared In Baskets
4. **Favorite Searches** lists your favorite searches.
5. The **Public** Section allows the user to review any "Doned" messages or to view Future Messages.
6. The **Folder Summary** at the bottom gives a count of all messages.

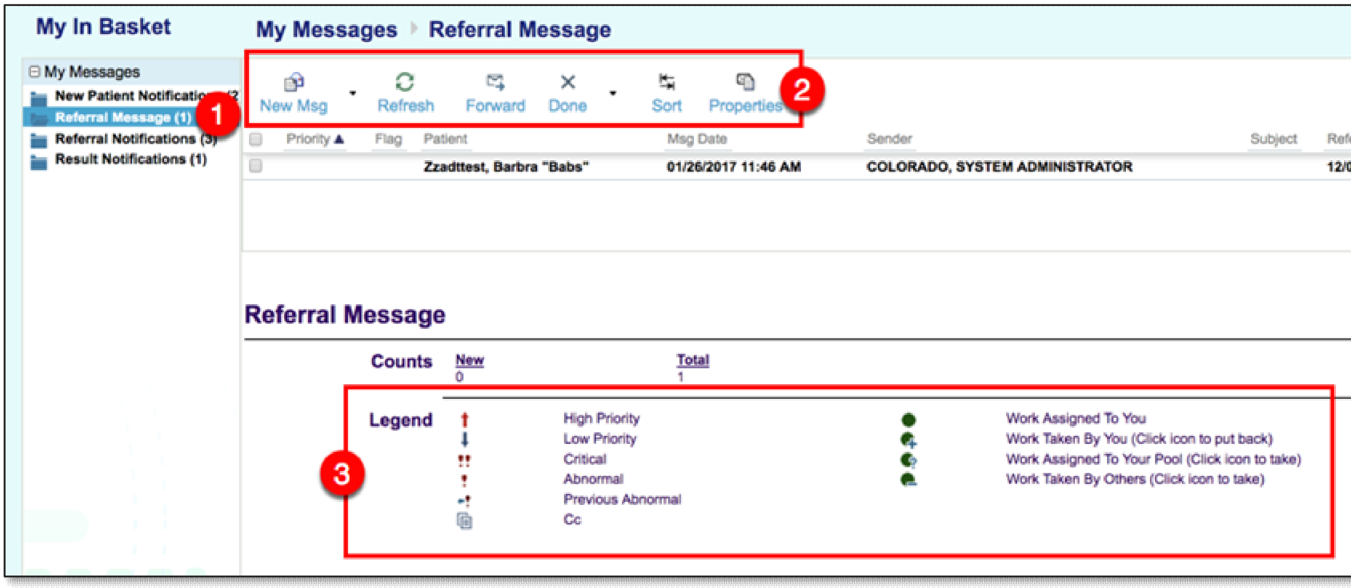


Note: The In Basket can also be accessed from the Home Page-> Event Monitor by clicking any of the notification links. Mask out the patient names and referral numbers

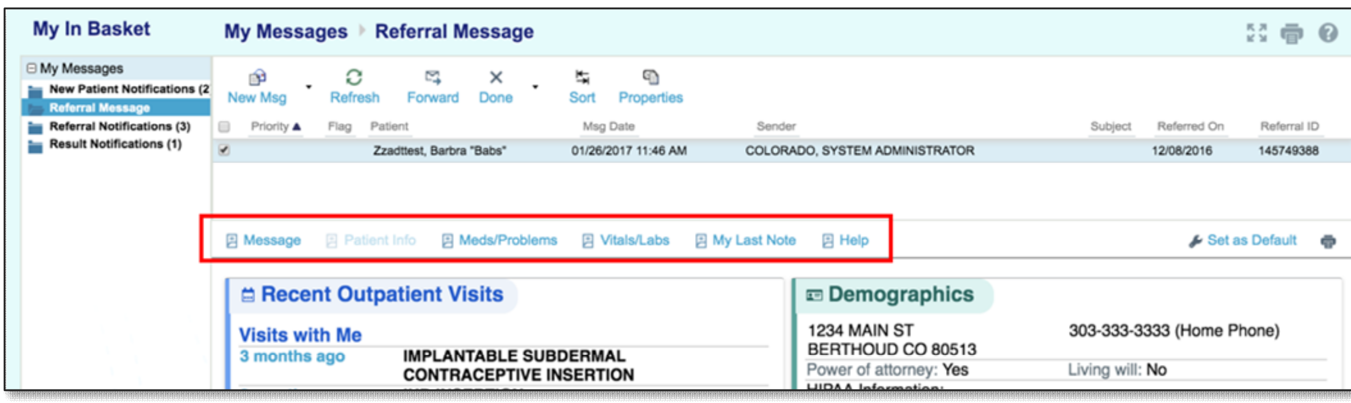


To View Messages of a Specific Type

1. From My In Basket, click the name of a folder type to view all the messages of that type.
2. The action buttons at the top of the message screen may change depending on the message type. For example, some message can be Forwarded while others cannot.
3. Note the Legend icons for messages. These icons help the user to understand priority and normal/abnormal results that may appear in messages.

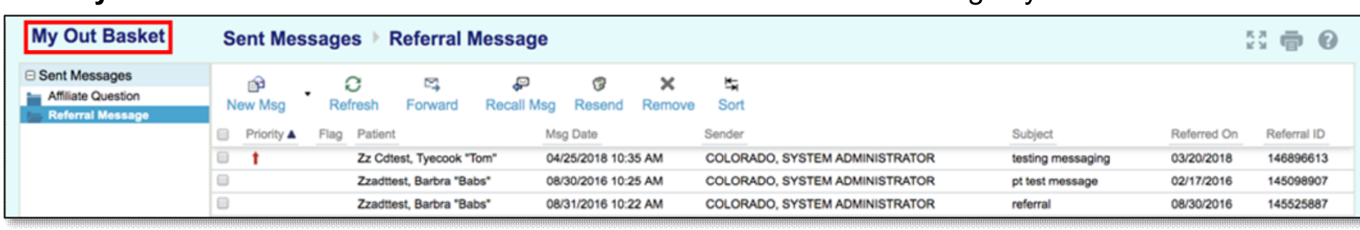


Select a message to preview the report pane. Click the report buttons to view the related report.



To View Sent Messages

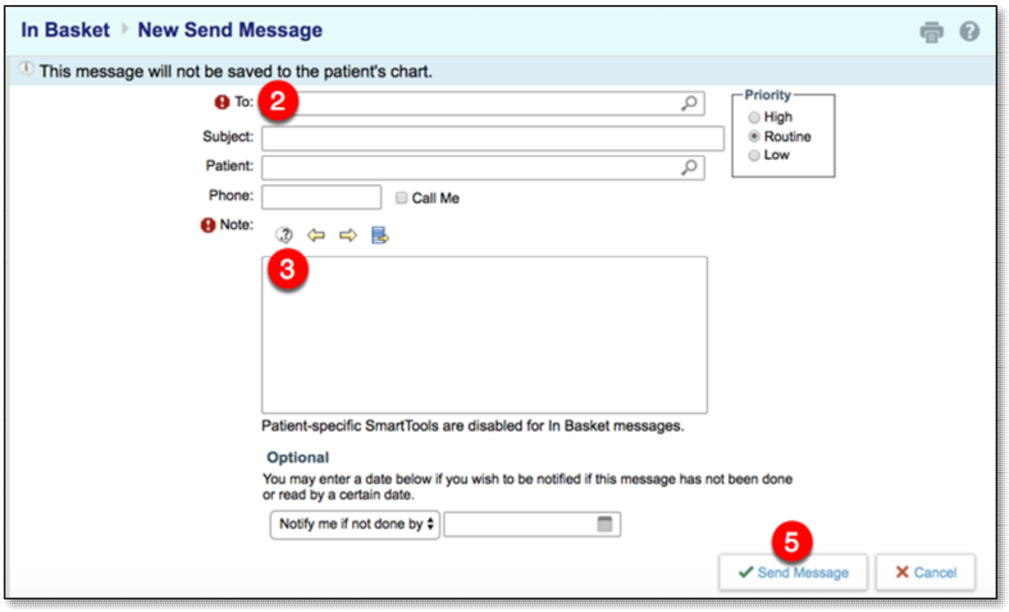
1. Click **My Out Basket** at the bottom left side of the In Basket to view messages you have sent.



To Write a New Message

1. Click the arrow next to the **New Msg** button to select the type of message to send.

2. In the **To** field, enter a **recipient** for the message.
3. Enter a detailed **Note**.
4. Complete remaining fields on the form.
5. Click **Send Message.**



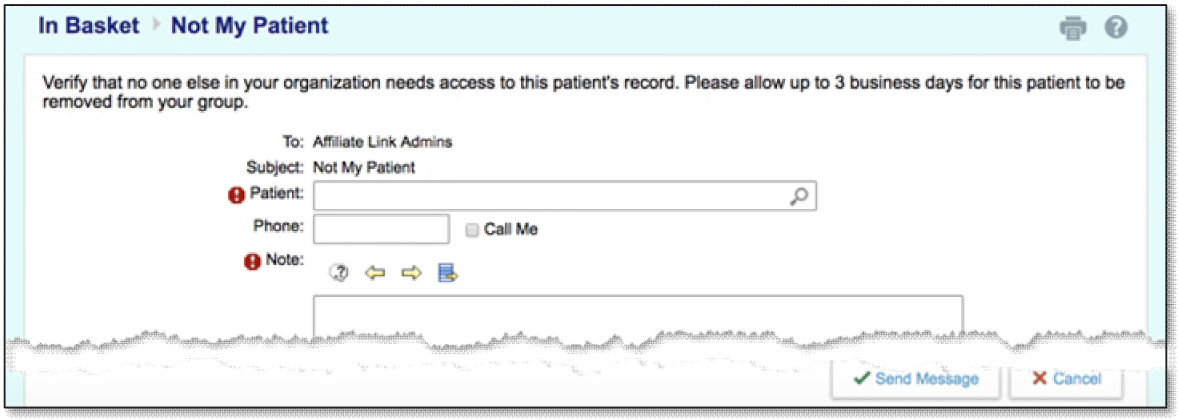
To Request Patients be Removed From Your List

If your group no longer needs access to a specific patient, send the **Not My Patient** message to request that the patient be removed. Before sending this message, verify that no one else on your team needs access to their chart. If they are referred to you, or if someone uses First Access to search for them again in the future, they will be re-added to your list.

Since the admin team must manually remove patients, please allow up to 3 business days for them to respond to this request.

1. Click the arrow next to **New Msg** and select **Not My Patient**.

2. Search for the **Patient** to be removed from the group list.
3. If you need to be contacted, provide your phone number and click the **Call Me** checkbox.
4. In the **Note** field, add any additional information relevant to this request.
5. Click **Send Message** in the bottom right corner.



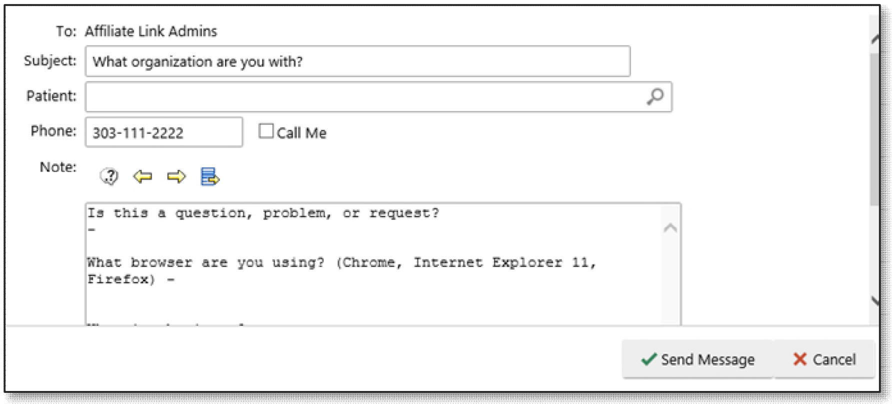
To Send a Help Desk Message

If you are experiencing a non-urgent issue, have a question for the Affiliate Link admin team, or have some other request, you can send a message to the admin team.

1. Click the arrow next to New Msg and select **Help Desk**.

2. In the **Subject** line, replace “What organization are you with?” with your group’s name. This will help triage issues to the correct people.
3. If the issue is related to a specific patient, add their name in the **Patient field**.
4. In the **Phone** field, add a contact number.
5. Answer the questions in the **Note** field with as much detail as possible.

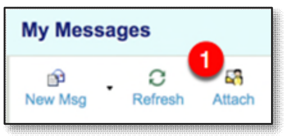
6. Click **Send Message**.



To Attach Another User's In Basket to Yours

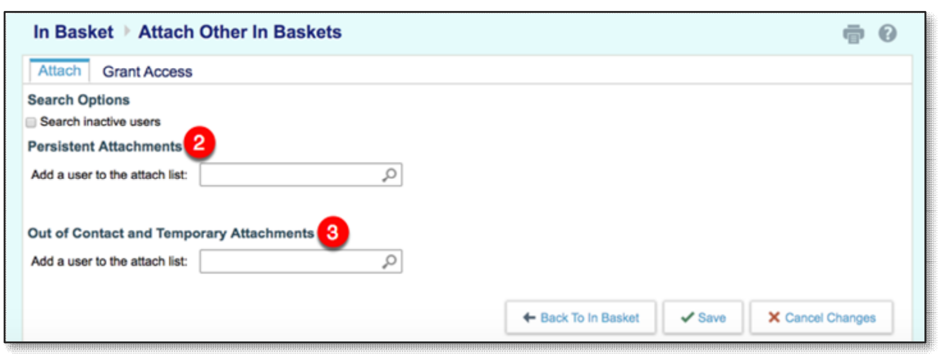
You can attach another user's In Basket to your In Basket to cover his/her messages while he/she is out of office. If you have In Baskets attached to your In Basket because you are marked as a delegate while the user is out of contact, you cannot remove the user's In Basket until the out of contact time has expired or been deleted. When you attach an In Basket to your own, you can then access all the other user's messages and take all the same actions as for your own messages.

1. Click the **Attach** icon.



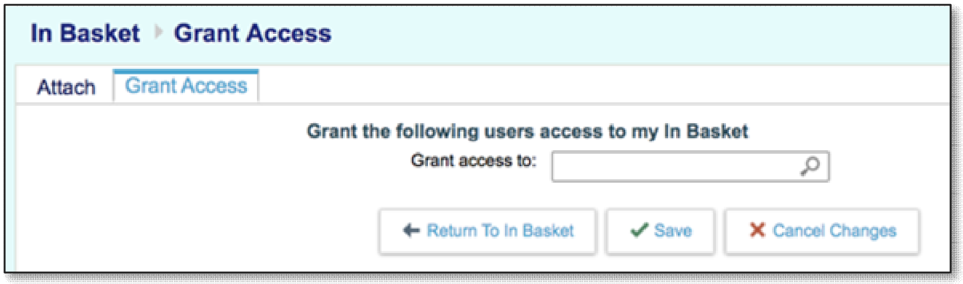
In the **Attach** tab:

2. **Persistent Attachments**: Add another user’s In Basket to yours. This will remain attached until you remove it manually
   a. Enter the user's name in the “Add a user to the attach list” field.
   b. Click **Save**.
3. **Out of Contact and Temporary Attachments:** This option attaches another user's In Basket to yours for only as long as you are logged in to the Web application.
   a. Enter the user's name in the “Add a user to the attach list” field.
   b. Click **Save**.



In the **Grant Access** tab:

4. Enter the name of the user you want to grant access to your In Basket.

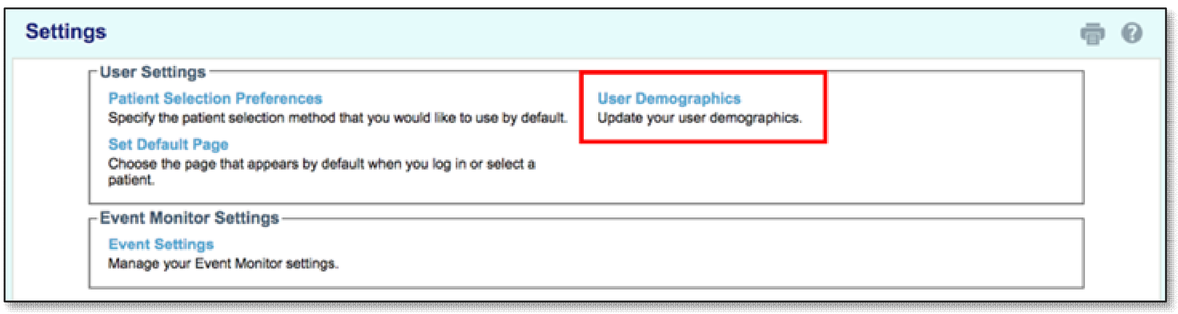


To Receive Email Notification of Unread In Basket Messages

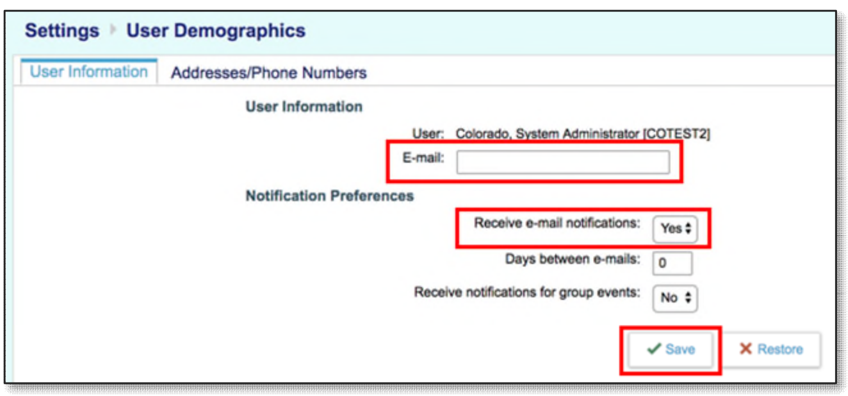
If you log into Affiliate Link infrequently, or simply want a notification of new messages in your In Basket, elect to receive notifications sent to your email address.

1. Click **Menu** and then **Settings.**

2. Click **User Demographics**.



3. In the User Information tab, add your preferred **E-mail**.
4. Change “Receive e-mail notifications” to **yes**.
5. Click **Save**.



If you no longer wish to receive email notifications, either remove your email address or change “Receive e-mail notifications” to No.

By default, the system will send you email notification every day that you have a new, unread message. If this is too often, you can change “**Days between e-mails**” to the frequency of your choice.

By default, the system will send you email notification of new pooled messages, aka messages that have been sent to a group of users. Event Monitor notifications about new referrals are an example of this. It may be that you are emailed a notification and when you log in to read it, someone else from your group has taken care of it. If you do not wish to receive notification for these kinds of messages, change "**Receive notifications for group events**" to **No**.

Help and Contact Information

For help using an activity, click the question mark on the upper right of the webpage.
For help with passwords or unable to log in, contact your provider representative at **1-866-866-3951**.