R1 Intro to Family Medicine – InBasket One-On-One Training

OVERVIEW:

Two 1-2 hour sessions for each R1 during their IFM rotation in which the R1 works one-on-one with an attending to learn tips for safe, efficient, standardized management of the Epic InBasket and FMC mailbox

GOALS:

1. To ensure patient safety by standardized management

1. To ensure patient satisfaction through efficient, clear communication and response, particularly to phone calls and refill requests

2. To improve provider wellness and satisfaction through increased confidence and efficiency in InBasket management

3. To improve FMC staff and provider wellness and satisfaction through appropriate, efficient, standardized management of the InBasket as a member of an office interdisciplinary team and a color-pool team

OBJECTIVES:

1. Access and utilize the FMC Policy & Procedure Manual to ensure adherence to guidelines

2. Manage "Results" according to FMC protocol, utilizing time-saving standardized QuickActions and recognizing when a patient should be contacted using MyChart, office staff, or directly by the provider

3. Know how to build a new or edit an existing "QuickAction" for Results management

4. List critical results/cut-offs requiring senior resident or attending oversight, and know where to access this list of critical results (FMC P&P or FMC webpage)

5. Manage "Rx Request" according to FMC protocol, including use of a side-by-side view and the "MA Refill Request" report to minimize need for additional chart reviewing and maximize the number of refills safely prescribed to reduce future requests

6. Refill medications in limited fashion or refuse refills to ensure patient adherence to necessary lab testing or follow up, including use of messages to pharmacy within prescriptions and with Epic "Quick Buttons", and use of Epic "QuickNotes" to MA

7. Recognize the importance of staying logged in to the color-team pool and how to appropriately manage pool results

8. Understand additional InBasket folders and principles of management

9. Understand management of paper mail and utilize FMC Policy & Procedure manual to guide management

APPROACH:

1. A 2 hour session is blocked out for each R1 twice during their Introduction to FM rotation and a training FMC attending is assigned

2. The R1 meets with the training attending in the FMC or residency offices utilizing a shared computer, logged in to the attending's Epic InBasket.

3. The R1 manages the attending's InBasket with the attending present to coach the R1 with attention to the Rx Request and Results folders as listed in the Objectives above

4. The R1 should also be taught how to log in and out of the color-team pool and how to appropriately manage pooled results

5. The R1 should also be shown, if not already known, how to utilize the FMC Policy & Procedure Notebook in Evernote and the FMC web page on the residency website to access: 1) critical lab cutoffs that requiring precepting; 2) mailbox management protocol; 3) Inbasket and pool management

6. As time allows, the R1 should also review the attending's or their own paper mail following FMC P&P guidelines

7. Each session should take 1-2 hours overall