

# Best Practice Guide for Managing Inbox Messages

- Direct all messages generated by patients to pools rather than individual providers
  - Direct clinical and administrative/scheduling messages to separate pools
  - Leverage “pool managers” or “lifeguards” to triage, distribute, and monitor messages using the “top of your license” principle
- Set up consistent naming conventions for creating and managing pools and develop an Inbox governance structure across the organization
- Use reminders to ensure resolution for patients’ scheduling and diagnostic study needs
- Utilize filters and customized views to organize messages
- Design standard text templates for common message responses
- Develop policies to reduce the number of administrative (e.g., non-clinical) communications
- Consider to disallow patients to directly message providers using either individual or facility-wide settings
- Develop protocols for identifying providers who have left the organization and rerouting their messages

- Offboarding processes should include plans to manage future messages
- Create a process for IT to capture the Inbox messages of providers who are inactive and reroute them appropriately
- Utilize analytics tools and metrics to understand message volumes, time spent with inbox activity, and identify areas for improvement
- Centralize management of certain message types (e.g., refused orders/documents) and direct them to a staff member for whom the task is at the top of their license
- Use reminders and intra-organizational messages to track current and future tasks (e.g. follow-up on patient care)
- Where appropriate, use Generative AI to reply to patient messages, such as normal test results:
  - AI has been shown to have higher levels of empathy
  - AI has generated time savings for physicians
  - AI has faster turnaround time for messages increasing patient satisfaction
- Consider automated replies (in addition to physician-in-the-loop drafts) for the following scenarios:
  - Advising patients sending messages with large word counts to call instead
  - Advising patients who sent many messages in a short period to call
  - Informing patients of laboratory results that are within normal limits



- Leverage the patient portal inbox message header for encouraging and empathetic content, common courtesy, emergency notification, and SLAs for response times.