HCA Guidelines for Result and Inbasket Management (Last updated 04/18/2025, by Alexa Triot)

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General HCA Results Management Guidelines

- For detailed lab follow-up guidelines, consult HCA Lab Result Follow-up Guidelines
    - This document includes 1) appropriate result follow-up for critical, abnormal and normal results, 2) involvement of other staff, nurses and interpreters to help with communication, and 3) best practices/tips.

General HCA Inbasket Management Guidelines

- **Personal Use**: Manage your own results and messages efficiently.
    - Use 'DONE' to mark items as completed and remove them from your inbasket.
    - Utilize 'FOLLOW UP' for items that need further action but can be temporarily hidden.
    - Prioritize actions based on urgency and patient care needs.

    - Check inbox at least once per day
- **Precepting Responsibilities**: Handle results from residents, NPs, or PharmDs effectively.
    - Normal results can be deferred to the ordering provider and marked as 'DONE'
    - For abnormal results (including mildly abnormal), use result notes, use 'FOLLOW UP'/Postpone, or leave in results folder until appropriate follow-up is complete.
        - If not urgent, postpone results for 7 to 14 days to allow time for the NP/resident/pharmD to address with the patient. Send email or inbasket message to provider if not addressed in the recommended time frame
        - If urgent and require real-time management, email or page the NP/resident/pharmD immediately, or address yourself if needed
    - If covering for the resident because they are on ICU, etc, you are responsible for responding to any abnormal results at that time
    - For any results *already* addressed by resident/NP, ensure appropriate management (look at MyChart, letter or phone note) and mark result as 'DONE'.
    - If no action has been taken and you would like to document you have reviewed these results, you can leave a result note (eg "No further action" or "Leaving for resident Dr. X to address").

Tip Sheet for MD-MD Coverage at HCA in Epic

- **Out of Contact (OOC) MD Best Practices**:
    - **Preparing for Absence**: Before leaving, minimize pending items in your inbasket to facilitate coverage for your patients.
        - We ask all outgoing faculty to bring their inbox to zero messages for (focusing on results, Rx requests, pt calls, pt advice requests folders). Utilize follow-up button to accomplish this.
    - **Action Management**: Use 'DONE' to finalize actions that do not require further follow-up. Use 'FOLLOW UP' for items that need attention upon your return.
    - **Communication:**
        - Send an email to the covering provider(s) to let them know of your absence. Schedule management will also send out weekly reminders to check Qgenda for coverage plans.

        - Schedule management will set up the “OUT OF CONTACT” away message to alert staff members and patients (via My Chart) of your absence
- **Covering MD Best Practices**:
    - The inbasket is a **shared space**. **When you are providing coverage, you essentially are "inside” their inbasket (not a copy, not a different version, etc) as if as if you are the other MD.** Anything you do to in the inbasket will be what happens to the inbasket for the other provider, because you are in the same mailbox.
    - **Coverage Scope**: See appendix or this link for coverage responsibilities guidelines based on length of absence and type of result/messages
        - **Short Absences (< 14 days)**: Prioritize urgent issues and time-sensitive messages received during your coverage period.
        - **Prolonged absences (>/=14 days)**: Address all messages as you would your own during your coverage period.
    - **Review Process**: Begin reviewing items from 5 PM of the previous day (or if covering on Monday, start from anything received after 5 PM on the preceding Friday).
        - Utilize the 'filter' feature to manage inbasket items by date and category effectively.
            - **This needs to be done for each subfolder of the inbasket.** To filter by date, click on the “filter” button on the R side of the screen under each subfolder -> filter by value -> date.
        - Move important or frequently used folders to the top of the inbasket list (see appendix for instructions) if this helps you do your review
            - **Subfolders to prioritize** are Results, Rx request, Patient Calls, and Patient Advice Requests
    - **Managing Inbasket Actions**:
        - **The two most important buttons to manage an inbasket are “done” and “postpone”.**
        - *Postponing the message.* Selecting “follow up” and then “postpone” until the OOO MD returns allows this inbasket message to disappear then reappear at the top of the inbasket on a date you select (after OOO MD arrives). Note: there is a place to add comments. These comments are viewable to anyone else in the pool to whom the message was sent. When the thread includes multiple people, it is not clear who posted the comment. Hit the

"insert name" button to include your name + date stamp with your comment
    - After postponing, click 'refresh' and the message will go away. Don't click done! If you click 'done' it will not come back.
- *When hitting DONE*: This will make it go away from the inbasket for **all** including OOO MD. The only way to see this action in the future is through the patient's chart
    - If you accidentally hit "done," you can scroll down to "completed work" and move the item from this list back into the inbasket

Action performed by coverage	**What to do in inbasket**
Addressed an issue in your colleagues inbasket so want it to go away **but you want your colleague to see it later**	Use the "FOLLOW UP" button in the inbasket item to postpone it
NOT addressed an issue in your colleagues inbasket (ie does not require action from covering MD) but will require action by the PCP/OOO MD	Use the "FOLLOW UP" button in the inbasket item to postpone it
Addressed an issue in OOO MD inbasket and do not feel that OOO MD needs to know about it (this will vary by individual, ex: routine med refills)	Hit DONE.
Wrote a message to a patient and they replied back to your inbasket	FORWARD the message to the PCP

- What if I want to leave a short message about a result or inbasket item to the OOO MD, as I used to in test results tracking in OMR?
    - There is no simple way to do this as there was in OMR. Options include:
    - *Forwarding message to PCP with a comment.* If you do this, consider delaying the delivery of the message (right hand side of screen). If not, it leads to a new message in the inbasket you are covering PLUS and OOO message in your inbasket from the OOO MD.

    - *Postponing the message.* Selecting “follow up” and then “postpone” until the OOO MD returns allows this inbasket message to disappear then reappear at the top of the inbasket on a date you select (after OOO MD arrives) with a comment. Note: These comments are viewable to anyone else in the message thread.
    - *Write a result note*: Click on results management and enter in a ‘results note’. Then postpone the result as above.

HCA Staff Best Practices

- **Patient Notification**: Inform patients about their PCP's absence and expected return date to manage expectations and provide reassurance.
    - If the request is non-urgent (ex: question regarding paperwork status) please inform patient of PCP return date and inquire whether a response after that time is OK. If so, please message PCP as FYI and message will be left in inbasket for PCP.
    - If message is regarding appt rescheduling, please inform that PCP is out of the office and coverage is not necessarily able to comment. If there is an acute clinical concern, please forward to nursing. If is a reschedule request only, please forward to appropriate CAA.
- When routing messages to covering MD, please route to the PCP **rather than forwarding to the coverage**. Do not send it to both people. Covering MDs have full access to the PCP inbasket.

Appendix:

Granting access to your inbasket to covering providers

If you want others to be able to see your message and follow up if needed, grant them access to your In Basket. Then, have them attach your In Basket to theirs. For example, you might grant your support staff access so they can handle normal lab results while you focus on abnormal ones. Or, you might grant access to a colleague when you're seeing patients all day without a break, so that he can address any urgent issues.

1. In your In Basket, click  **Attach**.
2. In the Attach Other In Baskets window, select the **Grant Access** tab.
3. In the **User** field, enter the names of anyone who should have permission to access your In Basket and click **Accept**.

	The people you grant access to must attach your In Basket to theirs to view your messages.
	Remove permission to access your In Basket by deleting the user's name on the **Grant Access** tab of the Attach Other In Baskets window.

Setting up 'Out of contact' Message *Do not enter pools. Enter specific individuals*

Allow colleagues to cover for you when you're unavailable

Instead of letting your In Basket messages accumulate while you're away from the office, use the Out of Contact activity to ensure that your most urgent messages are followed up on in a timely manner. For example, if one of your patients has abnormal results that need to be reviewed while you are out, another designated clinician can access your In Basket, review the results, and take the appropriate follow-up actions.

To set up this feature:

1. From In Basket, click Out of Contact on the In Basket toolbar.
2. Use the Out of Contact table to see any of your existing Out of Contact occasions, along with the dates, times, reasons, and delegates for each outage.

> Sort the occasions in the Out of Contact table by clicking a column header. Click the column header again to sort in the opposite order.

3. To add an Out of Contact occasion, click New at the bottom left of the screen.
4. Select the reason for your Out of Contact occasion. Optionally, add a comment.
5. Enter beginning and ending dates for your Out of Contact occasion. Enter specific times if needed.
6. Enter delegates to cover for you while you're out.
   a. Enter specific individuals in the Covering Users list.
   b. Enter a pool of users in the Covering Pools list.

> Your In Basket automatically appears under the Attached In Baskets tab for any pool members and individual users who are covering for you while you're out. However, your delegates do not receive any automatic notification that they will be covering for you, so you should tell them about your outage in person or by sending a Staff message.

7. Click Accept to close the Out of Contact window and save your Out of Contact occasion.

- To modify an existing Out of Contact occasion, select it and click Edit.
- To delete an existing Out of Contact occasion, select it and click Delete.
- To see updated information in the table after changes have been made, click Refresh All.

Attach someone's inbasket to yours:

Attach someone's In Basket to yours

After a colleague grants you access to her In Basket, you must attach it to your In Basket to view her messages.

1. In your In Basket, click Attach.
2. In the Attach Other In Baskets window, on the Attach tab, enter the name of the person whose In Basket you want to access, and then select one of the following:
   a. Add - This person's In Basket remains attached until you remove the person's name or she removes your access. For example, use this if you always review a physician's normal results messages.
   b. The next to Add, and then select Add Until Logout - This person's In Basket will only be attached until you log out. For example, enter a colleague's name here when she is busy and needs you to cover urgent issues.
3. Click Accept. The other person's In Basket is now attached to yours.

> Remove an attached In Basket from yours by deleting the user's name on the Attach tab of the Attach Other In Baskets window.

To open an attached In Basket, select the Attached In Baskets tab in the lower-left corner of your In Basket.

Coverage Responsibilities Guidelines: Coverage Responsibilities

See below for a guideline outlining responsibilities when you are covering a colleague. As a general rule, if you are covering someone "off-suite" it's usually most helpful to use their "home team" in terms of nurses, CRS staff, etc. as they may have an existing relationship with the patient.

Task to be done	Vacation Coverage (1-14 days absence)	Prolonged Absence Coverage (> 14 days absence)
Labs: communicate routine/normal	No	Yes
Labs: communicate urgent/abnormal (team with RNs when appropriate)	Yes	Yes
Radiology: communicate routine/normal	No	Yes
Radiology: communicate urgent/abnormal	Yes	Yes
Miscellaneous tests: normal BMD, pap, audiology, pathology, etc.	No	Yes
Miscellaneous tests: abnormal pap, pathology, etc.	Case-by-case basis	Yes
Patient Calls: urgent/sick, request for test results (team with RNs when appropriate)	Yes	Yes
Rx Requests: ALL (routine and controlled)	Yes	Yes
Prior authorizations: ALL (please initiate with rx staff) **may defer if non-urgent and PCP returns within 3 days*	Yes	Yes
Mail: VNA HHC/orders to be signed (incl Dr's Alliance), disability forms, FMLA, etc.	No	Yes
Mail: time-sensitive forms (work with CRS)	Yes	Yes
Mail: Outside ER /Discharge summaries/urgent care (team with RNs when appropriate to ensure follow-up if needed)	Yes	Yes
CC'd charts/Pended Orders: consultant letters, misc	No	Yes
Mail: request scanning or enter info into OMR sheets	No	No
Preceptee: any issues/questions/controlled substance rx	Yes	Yes
Patient Advice Requests (see above for category-specific advice)	Case-by-case basis based on urgency	Yes

Changing the order of subfolders:

Change the order of your In Basket folders

To make it easier to find important or frequently used folders, you can move them to the top of the list.

1. On the In Basket toolbar, click **Preferences**.
2. In the window that appears, go to the **Folder Order** tab.
3. In the Other Folders section, click ☆ next to your most frequently used folders to move them to the My Favorites section. Or, drag them up to that section.
    - To remove a folder from the My Favorites section, click ★ or drag it back to the Other Folders section.
4. Drag and drop to rearrange the folders in the My Favorites section. When these folders contain messages, they appear at the top of the folder list pane in the order you've specified.
    - The remaining folders continue to appear in the default display order below the folders you've moved to the top.
5. Click **Accept** to save your preferences.