**Quick Reference Guide For Key Epic Inbasket Functions During Coverage (click on link to directly navigate to that section)**


- Granting access to covering providers
- Setting up 'Out of Contact' message
- Attaching someone's inbasket to yours
- Reorganizing inbasket folders


- **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.

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|  | 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.

- **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.