

<p><b>UC Riverside, School of Medicine Policies and Procedures</b>  <b>Policy Title:</b> Provider In-Basket Message Management and Delegation  <b>Policy Number:</b> 950-03-038</p>
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<b>Responsible Officer:</b>	Chief Medical Officer
<b>Responsible Office:</b>	Clinical Affairs
<b>Origination Date:</b>	1/2023
<b>Date of Revision:</b>	N/A
<b>Scope:</b>	UCR Health Clinical Locations

## I. Policy Summary

UCR Health aims to provide safe and quality care to clinic patients. Electronic Health Record (EHR) in-basket tasks should be reviewed and addressed in a timely manner by clinical providers to assure patients receive timely care.

## II. Definitions

EHR: Electronic Health Record

In-Basket Tasks: The EPIC In Basket is an electronic messaging system designed to meet the complex communication need of UCR Health. While similar to email, In Basket is a more robust (and secure), closed messaging system that allows users to send and receive messages about patient accounts, charts, and orders.

## III. Procedures

### A. In-Basket Tasks Timeline

In-Basket tasks will be resolved according to the following timeline:

1. In-Basket Tasks response time guidelines:
  - a. Critical labs/radiology test results: within 1 hour
  - b. Urgent/high priority tasks: within 24 hours (one business day)
  - c. Non-urgent tasks: within 72 hours (three business days)
2. EPIC marks tasks as old based on industry wide standards. Providers must have zero old tasks in their in-basket to remain compliant.
  - a. Messages must be marked as "Done" to be removed from the task in-basket management.
3. If you experience any system errors that prevents you from resolving your in-basket tasks, contact the EPIC Optimization Committee at [ucrhealthepicrequests@medsch.ucr.edu](mailto:ucrhealthepicrequests@medsch.ucr.edu) within 24 hours.

### B. Out of Office/Time Away from Clinical Duties In-Basket Management

In-Basket tasks will be routed (via EPIC system) to a designated clinical provider when the provider is out of the office for more than one business day. – (Refer to the Faculty Time Off Policy and Procedure)

1. Provider must set Out of Office delegation in EPIC prior to time away from clinical duties.

- 2. Designated coverage expectations include, responding to all In-Basket tasks per the In-Basket tasks response time guidelines, including messages submitted prior to provider’s leave.

**C. Provider In-Basket Management Data**

- 1. Finance and Administrative Officer (FAO) and Department Chairs are responsible for reviewing the data report to ensure providers have zero old tasks. Non-compliance requires an action plan to be created by FAO, Department Chair, and Provider to return to compliant status.
- 2. Data report includes all old In-Basket tasks which are not marked as “Done”/”Closed”, including, read tasks.

**D. Changes in Law and Guidance**

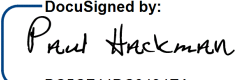
In the event of a change in law, regulation, guidance, etc. notice will be provided and such change will be considered effective upon receipt. In the instance of any discrepancies between this policy and those updates will prevail until the policy can be updated to reflect those changes.

**IV. Responsibilities**

UCR Health Providers, Finance and Administrative Officer (FAO), and Department Chairs.

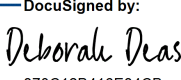
Approvals:

COMPLIANCE COMMITTEE (03/14/2023)

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