

Attaching an In Basket—Step one

Before a staff member can attach your In Basket, you will need to grant them access

1 Click **In Basket** button

2 Click **Attach** button

3 Click **Grant Access** tab

4 Enter name in format **LASTNAME, FIRST NAME** then click **magnifying glass**

5 Click **Save**

After you are finished granting access, notify those selected to monitor your In Basket follow *Step 2 below*

The screenshot displays the Epic In Basket interface. The top navigation bar includes 'Dartmouth-Hitchcock', 'In Basket' (highlighted with a red circle 1), 'Patient...', 'Referral...', 'Upcomi...', 'Legacy...', 'Patient', 'Manage...', 'Menu', 'Log Out', and the 'Epic' logo. Below the navigation bar, the 'My In Basket' section shows 'My Messages' and 'CCd Charts'. The 'My Messages' section has buttons for 'New Msg', 'Refresh', 'IB Pools', 'Search', and 'Attach' (highlighted with a red circle 2). Below these buttons are 'Favorite Searches' and 'Public' options. A modal window titled 'In Basket Grant Access' is open, showing the 'Grant Access' tab (highlighted with a red circle 3). The modal contains a search field labeled 'Grant access to:' (highlighted with a red circle 4) and a list of users: 'EPICCARE LINK, FRONT DESK' and 'DHLINKB, PHYSICIAN'. A 'Remove' button is next to the first user. At the bottom of the modal are three buttons: 'Return To In Basket', 'Save' (highlighted with a red circle 5), and 'Cancel Changes'. The footer of the screenshot shows 'Logged in as: EPICCARE LINK, PHYSICIAN' and 'EpicCare® Link and PlanLink™ licensed from Epic Systems Corporation, © 2018 Epic Systems Corporation.'

Attaching an In Basket—Step two

After provider has granted access to their In Basket, you will need to attach to it

- 1 Click **In Basket** button
- 2 Click **Attach** button
- 3 Click **Attach** tab
- 4 Enter name in format **LASTNAME, FIRST NAME** then click **magnifying glass**
- 5 Click **Save**

After you are finished you will have access to both your own and the provider's In Basket.

Each In Basket will appear as a separate folder tree

The screenshot displays the Epic In Basket interface. The top navigation bar includes 'Dartmouth-Hitchcock', 'In Basket', 'Patient...', 'Referral...', 'Upcomi...', 'Legacy...', 'Patient', 'Manage...', 'Menu', and 'Log Out'. The 'Epic' logo is in the top right. Below the navigation bar, the 'My In Basket' and 'My Messages' sections are visible. The 'My Messages' section contains 'New Msg', 'Refresh', 'IB Pools', 'Search', and 'Attach' buttons. The 'Attach' button is highlighted with a red circle 2. Below this, the 'Attach Other In Baskets' dialog box is open, showing 'Attach' and 'Grant Access' tabs. The 'Attach' tab is selected and highlighted with a red circle 3. Under 'Search Options', there is a checkbox for 'Search inactive users'. Under 'Persistent Attachments', there is a search input field with a magnifying glass icon, highlighted with a red circle 4. Below this, under 'Out of Contact and Temporary Attachments', there is another search input field. At the bottom right of the dialog box, there are three buttons: 'Back To In Basket', 'Save' (highlighted with a red circle 5), and 'Cancel Changes'. The footer of the interface shows 'Logged in as: EPICCARE LINK, PHYSICIAN' and 'EpicCare® Link and PlanLink™ licensed from Epic Systems Corporation, © 2018 Epic Systems Corporation.'