


4Next Non Mass General Brigham Referrals – Day 1 Tip Sheet


This tip sheet includes the basics for using the new version of 4Next, beginning 1/28/2024. **Thanks for using 4Next!**

Logging In, Help, Enrollment, and eLearning

Task	4Next Referrals Received (beginning 9/10/2023)
Login	Go to https://4next.massgeneralbrigham.org/ Click Login , top right
Open the Enrollment Form (before login)	Click Help ▾ > All other 4Next Users Scroll down and then click 4Next Enrollment Request Form (pdf)
Contact Us, before login	Click Help ▾ > All other 4Next Users Next, click Contact Us
Contact Us, after login	Click the menu made up of your INITIALS LASTNAME, FIRSTNAME ▾, and then click Contact Us
Instructions	Click Help : context-sensitive online help with full-text search; includes links to tip sheets and eLearning
Video tutorials	<ol style="list-style-type: none">1. Log in to 4Next, and then click Help.2. Click  in the upper left to display the Contents.3. Click the third link, 4Next tip sheets & training.4. Scroll down to the section for non-Mass General Brigham providers: <div>Online eLearning and demonstrations for non-Mass General Brigham providers<ul style="list-style-type: none">➤ eLearning for 4Next 2.0 - eLearning link and training tips For staff at non- Mass General Brigham post-acute sites that are receiving referrals in 4Next 2.0➤ 4Next demo - Enrollment Form and Help - video demonstration on finding the enrollment form for new non- Mass General Brigham users, and using the context-sensitive online help➤ 4Next demo - Review of Referral Management - video demonstration of the 4Next 2.0 compared to the previous version</div>

Quick tips for day 1

Managing the Referrals List:










- To view the list of referrals, click **Referrals Received** (top left; turns yellow when selected). This replaces the Case List (upper right) from the previous version. If needed, click **REFRESH** (top right) to manually update the list.
- The first time you login the referral list will be empty. Select from the **SITES** ▾ list to display referrals. Your selection will carry over after you log out and log back in.
- You may also use the new filtering options (green boxes) by selecting from the drop-down lists: **STATUS** ▾, **SITES** ▾, **VIEW BY LIST** ▾. Click  on the green box to remove a filter.
- If you had notifications set up in the previous version of 4Next, you'll receive email notifications for all 4Next actions. To update your notifications or change to text messaging, please see page 3.
- If the referral list has more referrals than you want, please ensure your My List Preferences are set up. Please see page 3.

After selecting a patient:






- Refer to the instructions below on how to communicate with the acute provider.
- Accepting or denying the referral is done through manually changing the status by clicking the ⋮ menu on the right of the referral status. This replaces using the Accept and Deny options on the left-hand side from the previous version.
- Referral details are displayed by clicking the **DETAILS** button (top right). To go back to the main referral page, click the **MANAGE** button (top right). This replaces the individual tabs from the previous version.

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Communication and review: once you have selected a referral

Task	4Next Referrals Received (beginning 9/10/2023)
View messages	<ul style="list-style-type: none"> Referral Management is the default display on opening the referral;  Communication is the section below patient info The section heading includes an unread messages counter 1 Only the most recent message displays; the whole message is shown, including sender's name & phone, and the timestamp To view all messages, click the  Communication heading; to show only the latest message, click the heading again Incoming = gray background on the left; Outgoing = teal background on the right
Send and respond to messages	<ul style="list-style-type: none"> Click  in the  Communication heading, complete the message, and send. —OR— With the  Communication section open, scroll to the bottom of the thread, complete the message, and send.
Mark messages as read (updating the unread messages flags and counters)	To mark incoming messages as read, click  Communication to show all messages, and then click the empty circle  next to the time stamp to fill it in  . This updates the counter on the Communicate section and on the Referrals Received list.
Updating the status	<ol style="list-style-type: none"> Click the  menu on the referral heading, to the right of the referral status. Select a status. Options depend on the current status of the referral. Complete the message and send. <p>**When you can take the patient, you must set the status to Offered so the sender can accept offer **</p>
Reviewing the Referral Details	To view and print details of the referral, including the face sheet, insurance, comments, clinical documents, attachments, click the DETAILS button (top right)

Best practices for setting the referral status






 Received	You can use this to acknowledge receipt. If you can't <i>offer</i> or accept pending more information, due to clinical concerns or to current lack of beds or staffing, use this message to say so.
 Accept Pending	You are clinically accepting the patient, <i>pending additional information and/or documentation</i> . List the information and/or documentation you're looking for.
 Offered	You are notifying the sender that <i>you will take the patient</i> . To set an offer back to Accept Pending, cancel the referral, then change the status to Accept Pending.
 Deny	You <i>will not be able to take the patient</i> under current circumstances. To monitor for new messages on denied referrals, select VIEW BY LIST > Referrals With Unread Messages, and then select STATUS > Denied. You have the option to change the Denied status back to Accept Pending or Offered.
 Cancel	You need to cancel an offered, accept offer, or finalized referral. You have the option to change the Canceled status back to Accept Pending or Offered.

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Setting up Notifications (email and/or text)

If you had any notifications set up in the previous version of 4Next, you'll receive email notifications for **all** 4Next events.

Quick video: [Demo on updating Notifications in 4Next](#)

1. Click the menu made up of your **INITIALS LASTNAME, FIRSTNAME**.
2. Click the Profile option.
3. Click **Notifications** in the index on the left.
4. Click to select a provider from the drop-down list.
5. If you want to switch to text (SMS)—click **ADD** under SMS Notification Settings. The Add Subscription popup displays. Click **SAVE** to subscribe for SMS notifications.
6. To remove email notifications, click  to the right of You are set to receive notifications at *your email address*.
7. If you want to use an email address other than the one in your Profile contact information, click , and then click to turn the switch off . Type the email address to use for notifications, and then click **SAVE** to confirm you want notifications sent as described.
8. **IMPORTANT!!** Set up the events that will trigger a notification:
 - To get notifications for an event, click to turn the switch to on .
 - To stop getting notifications for an event, click to turn the switch to off .
9. If you have access to more than one site, repeat the process for every site.




Event	Description
Sent	A new referral has been sent to you, or a retracted referral has been resent to you
Accept Offer	Your offer has been accepted
Retracted	The referral has been removed by the sender
Finalized	Your accepted offer has been finalized by the sender
Message	A new informational message has been sent to you (does not include messages that accompany any of the status changes above)

Setting up My List filter preferences

Preferences give you options to filter by the first letter of the patient's last name, and show referrals only from selected sites. Your preferences are applied whenever you select a **VIEW BY LIST** filter.

****Preferences cannot be transferred from the old version to the new version of 4Next.**

Quick video: [Demo on setting up My List advanced preferences in 4Next](#)

1. Click the menu made up of your **INITIALS LASTNAME, FIRSTNAME**.
2. Click the Preferences option.
3. Click to select a provider.
4. To add an item, click  to display a checklist of options.
5. Click to check  one or more items. The only available items are those that are not already selected.
6. When all applicable items are checked, click **SAVE**.
7. To remove an item, click its .
8. Click **RETURN TO LIST** when the filters you want are set.
9. If you have access to more than one site, repeat the process for every site.