




4Next Tip Sheets – MGBHC monitoring report

MGBHC Liaison Sorting Report

Liaisons tasked with monitoring referrals to Mass General Brigham Home Care can use the Liaison Sorting Report to search for referrals, and then export the information to Excel. The information in Excel can be filtered to identify referrals with potential missed visits, to manage referrals with an upcoming start of care (SOC), and to validate Expected Discharge dates.

High-level steps

Pull the report into Excel and turn on filters

1. Click <http://phsqlweb430/Reports/report/4Next2.0/Liaison%20Reports/LiaisonsSorting>.
2. Set the parameters: Referral Source Type (All, MGB, nonMBG); Referral Source (one or more sites); Providers (one or more from MGBHC and Spaulding sites)
3. Click the View button.
4. Click  to open the export drop-down menu, and then click the Excel option.
5. When prompted, click the Open button.
6. Click the Sort & Filter menu, and then click the Filter option.

Finding potential missed visits

Only relevant cases that have an Actual Disch Date, but no SOC, ROC, or Revisit date, are shown on the report.

1. Clear all filters.
2. Set filters:
 - Status column: Uncheck Select all; check Accept Offer, Finalized, Offered.
 - Actual Disch Date: Uncheck Blanks (end of list).
 - SOC: Uncheck Select All, and then check Blanks (end of list).
 - ROC and Revisit Date: For both columns, uncheck Select All, and then check Blanks (end of list).
3. Sort the list A to Z in the PatientName column.
4. For each patient on the filtered list, please look at Discharge Summary on acute side. If indicated that patient went home with Mass General Brigham Home Care, we need to secure the visit.

Finding next-day discharges with SOC that need registration and/or orders

Only relevant cases that have an SOC date, which are missing REG and/or ORD, are shown on the report.

1. Clear all filters.
2. Set filters:
 - Status column: Uncheck Select all; check Accept Offer, Finalized, Offered.
 - Actual Disch Date: Uncheck Select All and then check tomorrow's date.
 - SOC: Uncheck Blanks (end of list).
 - Progress: Uncheck all that have both Reg and ORD.
3. Sort the list A to Z in the PatientName column.
4. Add Finalized to Referrals Received filter. Find each patient in Referrals Received. As needed, Send to Admissions, answer Yes to Orders Received.

Checking expected discharge dates

Only relevant cases that have no Actual Disch Date, but do have an Expected Disch Date, are shown on the report.

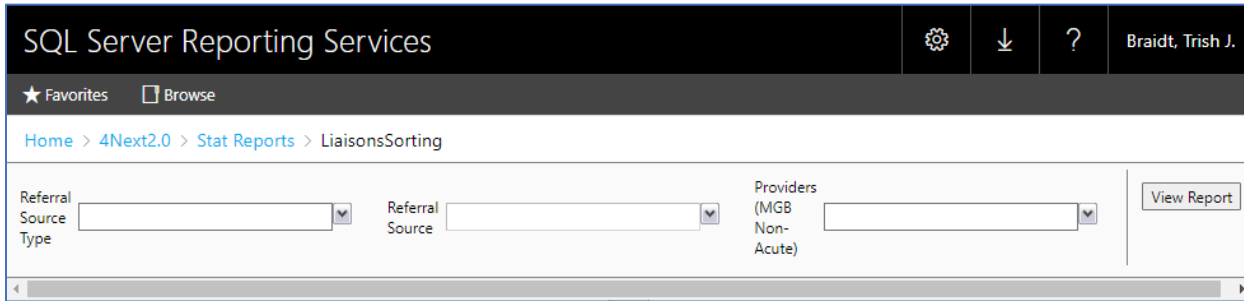
1. Clear all filters.
2. Set filters:
 - Status column: Uncheck Select all; check Accept Offer, Finalized, Offered.
 - Actual Disch Date: Uncheck Select all, and then check Blanks (end of list).
 - Expected Disch Date: Uncheck Blanks (end of list).
3. Sort the list A to Z in the PatientName column.
4. For each patient on the filtered list, check to see if the patient is going as planned.
5. If the expected discharge date is not correct, update the PAA on the Details view of the referral.



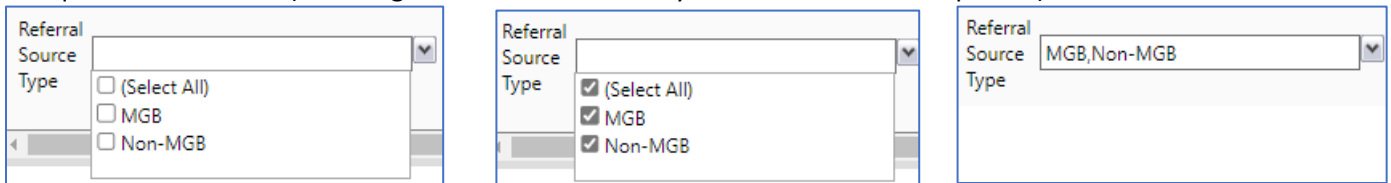
4Next Tip Sheets – MGBHC monitoring report

Generating the report

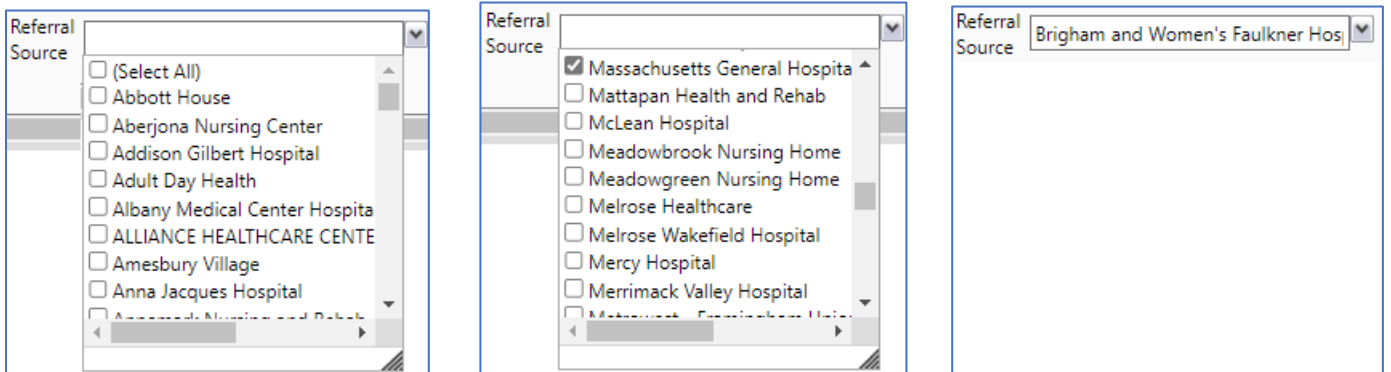
1. Access the 4Next reporting portal: [URL for production goes here](#)
(You must be on the network, either on-site or VPN, to run the report.)



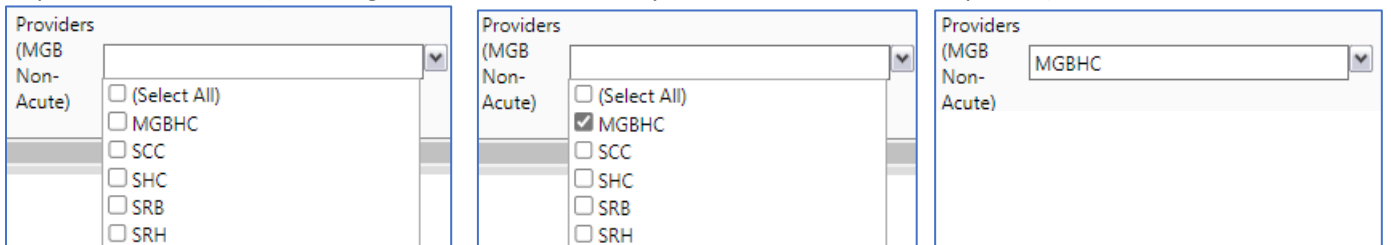
2. Click to display Referral Source Type options, and then click to check which type(s) to look for. At least one source is required to continue. (Checking Select All automatically checks off the other options.)



3. Click to display Referral Source options, and then click to check which source(s) to look for. At least one source is required to continue. (Checking Select All automatically checks off all the other options.)



4. Click to display Providers options, and then click to check which MGB provider(s) to look for. At least one source is required to continue. (Checking Select All automatically checks off all the other options.)



5. Click . The report is displayed beneath the search parameters.



4Next Tip Sheets – MGBHC monitoring report

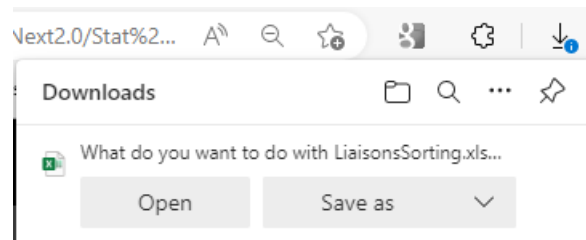
Exporting the Report to Excel

Referral Source: MGB, Non-MGB | Referral Source: Brigham and Women's Faulkner Hos | Providers (MGB Non-Acute): MGBHC | View Report

Referred To	Referred From	Location	PatientMRN	PatientName
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	MGHE12 E1206 A	8003695	admission, medicare
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	mghe12	8001184	amaze, six
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	mghe12	8000543	amaze, three
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	mgh emer	8006996	amaze, two
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	mgh adm pool	8002730	approved person, girl
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	MGH L10 L1014 A	8003332	atbeazeroonezero, epicprdcopydowntwentytwenty
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	mgh w10	8005298	atcinfourthreefour, epicprdcopydowntwentytwenty
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Hospital	CARDS10W 1029-1	97405229	atcinfourthreeethree, epicprdcopydowntwentytwenty
MASS GENERAL BRIGHAM HOME CARE	Massachusetts General Hospital	MGH E16 E1602 A	8006877	atplzeroonene, epicprdcopydowntwentytwenty
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Faulkner Hospital	bwfnur6n	80127174	bdlcovid, fn
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Hospital	mchem4b	97432843	beacon, amanda
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Hospital	HEMONC7D 78-1	97469944	bedside, bwf

Report of referrals from BWFH, BWH, and MGH to Mass General Home Care

1. If you haven't already, generate the report.
2. Click to open the export drop-down menu, and then click the Excel option. (It's second on the list.)
3. The Downloads popup opens in the upper right. (If it closes before you get to the next step, click .)



4. Click the Open button. The report opens in Excel.

AutoSave: Off | Search: (Alt+Q) | Braidt, Trish J.

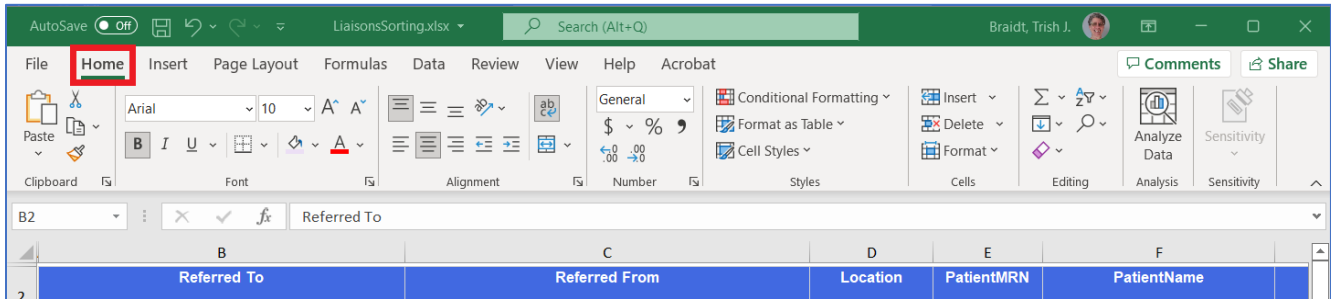
Referred To	Referred From	Location	PatientMRN	PatientName
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Hospital	CARDS10W 1029-1	97405229	atcinfourthreeethree, epicprdcopydowntwentytwenty
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Hospital	mchem4b	97432843	beacon, amanda
MASS GENERAL BRIGHAM HOME CARE	Brigham and Women's Hospital	HEMONC7D 78-1	97469944	bedside, bwf



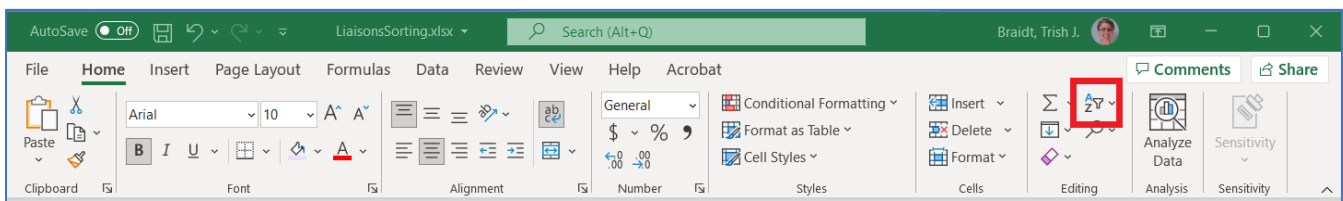
4Next Tip Sheets – MGBHC monitoring report

Turning on filters in Excel

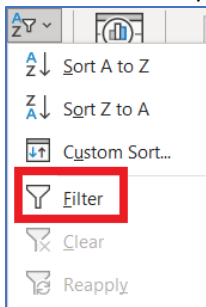
1. If you haven't already, generate the report and then export into Excel. The Home options are shown by default.



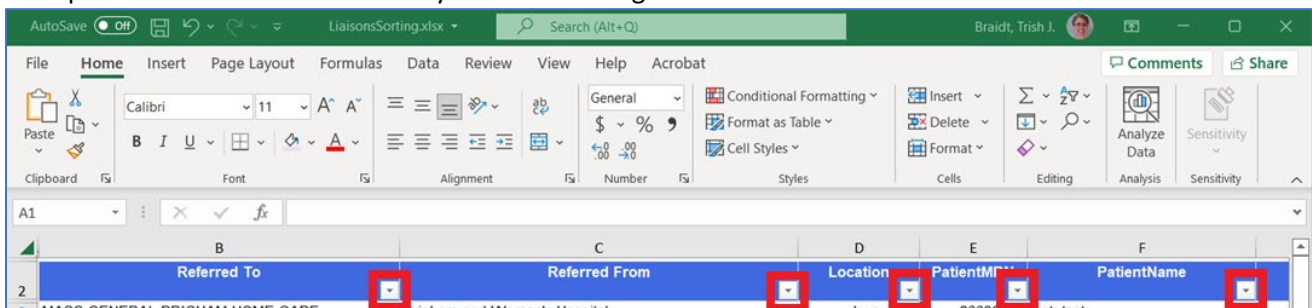
2. Click the  button in the Editing section. (If your Excel window is big enough, the button is labeled Sort & Filter.)



3. Click the Filter option.



4. A drop-down arrow is added to every column heading.

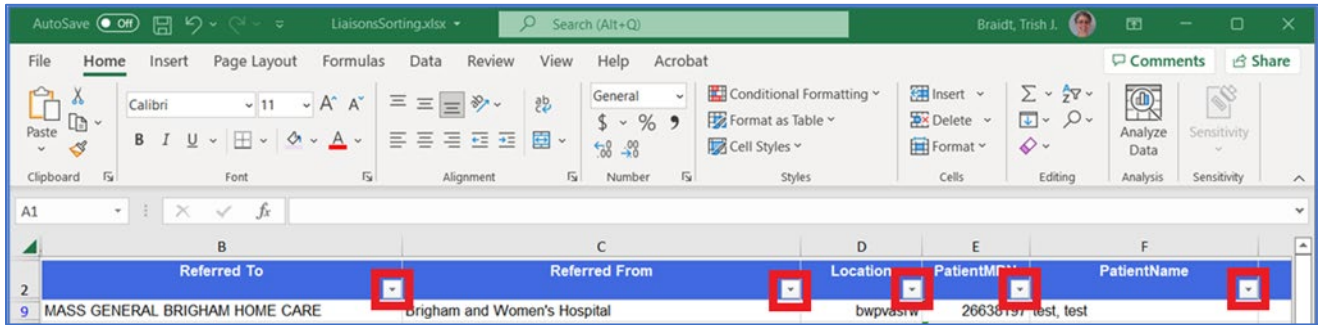




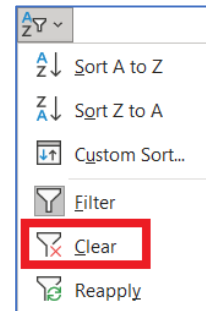
4Next Tip Sheets – MGBHC monitoring report

Finding potential missed visits

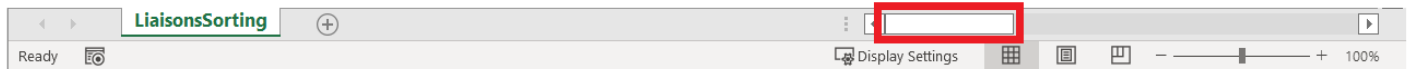
1. If you haven't already, generate the report, export into Excel, and then turn on filters.



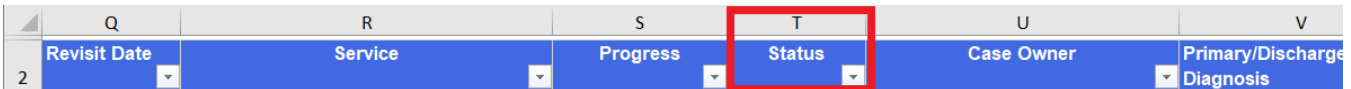
2. If you applied other filters already for a different task, clear them by clicking the Clear option on the Sort & Filter menu on the Edits section.



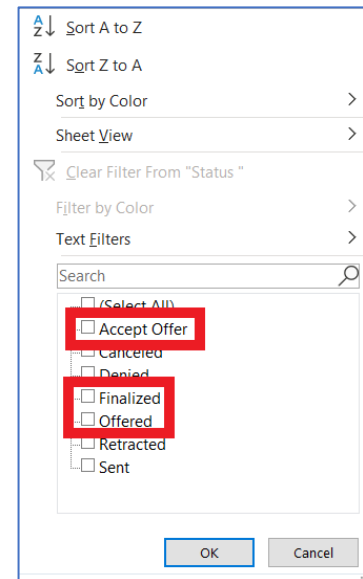
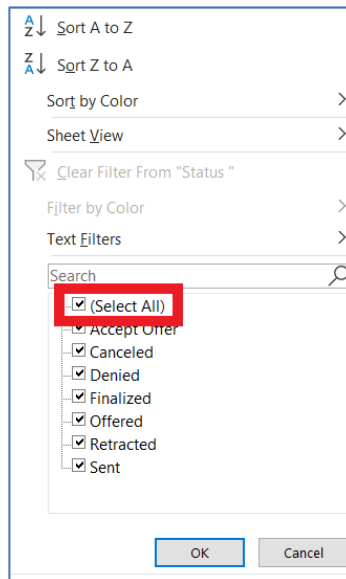
3. Scroll by clicking and dragging the horizontal scrollbar handle (highlighted below) to the right. →



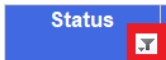
4. Watch the column headings. Stop scrolling when you can see the Status column (T).



5. Click in the Status column. The Sort & Filter menu opens.
6. Click to uncheck the (Select All) option.
7. Click to check the following options:
 - Accept Offer (by the sender)
 - Finalized (by the sender)
 - Offered (by MGBHC)
8. Click the OK button.



The column is flagged to show that it's filtered:



The report shows only referrals where MGBHC is offering to take the patient, or the sender has accepted or finalized the offer.

Continued on next page



4Next Tip Sheets – MGBHC monitoring report

9. Scroll back by clicking and dragging the horizontal scrollbar handle (highlighted below) to the left. ⇐
10. Watch the column headings. Stop scrolling when you can see the dates, in columns L through Q:

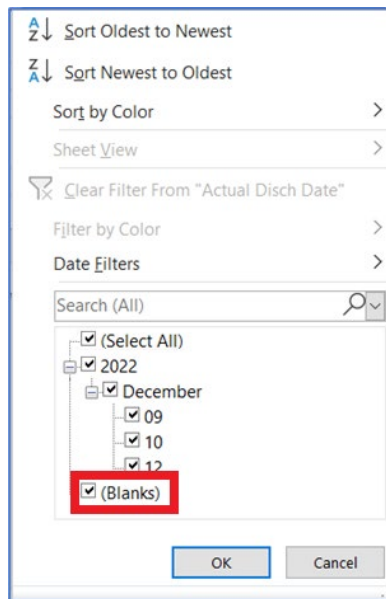
L	M	N	O	P	Q
Admit Date	Expected Disch Date	Actual Disch Date	SOC	ROC	Revisit Date

11. Click in the Actual Disch Date column. The Sort & Filter menu opens.
12. If needed, scroll down to the bottom of the list.
13. Click to uncheck the (Blanks) option.
14. Click the OK button.

The column is flagged to show that it's filtered:



Only relevant cases that have an Actual Disch Date are shown on the report.

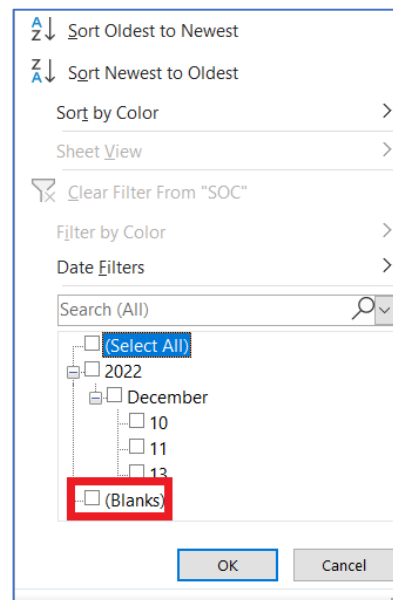
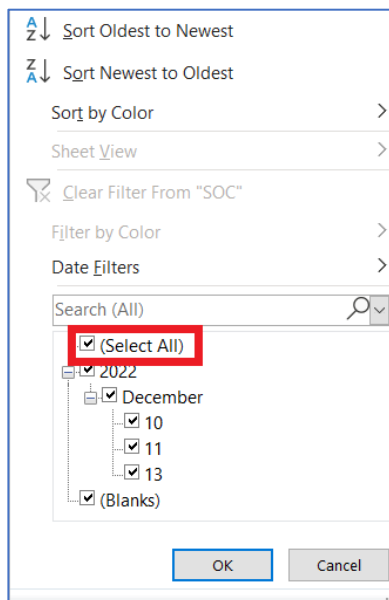


15. Click in the SOC column. The Sort & Filter menu opens.
16. Click to uncheck the (Select All) option. (This unchecks all the dates, as well as the Blanks option.)
17. If needed, scroll down to the bottom of the list.
18. Click to check (Blanks).
19. Click the OK button.

The column is flagged to show that it's filtered:



Only relevant cases that have an Actual Disch Date, but no SOC date, are shown on the report.



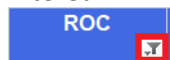
Continued on next page



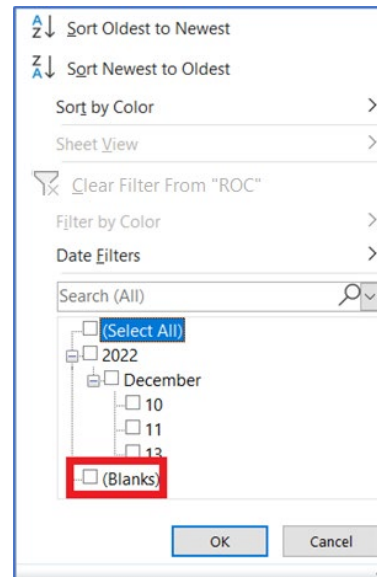
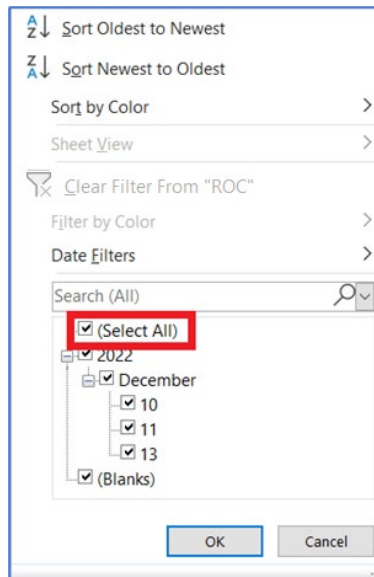
4Next Tip Sheets – MGBHC monitoring report

20. Click in the ROC column. The Sort & Filter menu opens.
21. Click to uncheck the (Select All) option. (This unchecks all the dates, as well as the Blanks option.)
22. If needed, scroll down to the bottom of the list.
23. Click to check (Blanks).
24. Click the OK button.

The column is flagged to show that it's filtered:

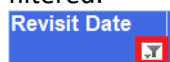


Only relevant cases that have an Actual Disch Date, but no SOC date, that are not ROCs, are shown on the report.

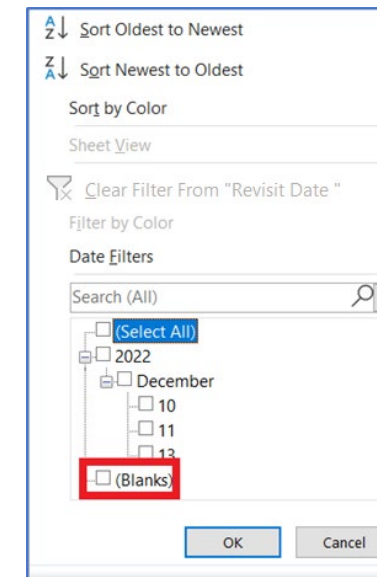
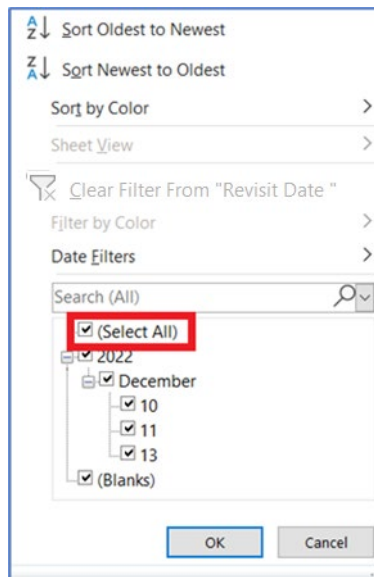


25. Click in the Revisit Date column. The Sort & Filter menu opens.
26. Click to uncheck the (Select All) option. (This unchecks all the dates, as well as the Blanks option.)
27. If needed, scroll down to the bottom of the list.
28. Click to check (Blanks).
29. Click the OK button.

The column is flagged to show that it's filtered:



Only relevant cases that have an Actual Disch Date, but no SOC date, that are not ROCs or revisits, are shown on the report.



30. Scroll back by clicking and dragging the horizontal scrollbar handle (highlighted below) to the left. ⇐
31. Watch the column headings. Stop scrolling when you can see the PatientName column (F).

	D	E	F	G	H	I	J	K
	Location	PatientMRN	PatientName	DOB	Insurance	City	State	Zip
2								
4	mghe12	8001184	amaze, six	07/07/1986	self			
38	mcpo8a	97419162	epictest, lindseybwh	03/18/1989	self	franklin	ma	02038
75	bwhmcekg	08942385	oe-test, bilbo	01/01/1960	self	everett	ma	02149
81	mg case management	8002383	optime, insurance	12/25/1980		anchorage	AK	99515
82	bwh care coordination	97446298	pasta, ravioli	04/12/1989	self	queens village	NY	11427
84	perioip	8009785	prismweb, casefour	09/27/1995	self	medford	ma	02155
100	mg case management	8000127	radvalidate, elsa	09/14/1965	blue cross blue shield	somerville	MA	02145
121	bwpvasrw	26638197	test, test	01/01/1990	united healthcare	natick	ma	01760

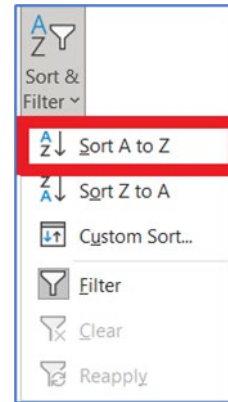
Continued on next page



4Next Tip Sheets – MGBHC monitoring report

- 32. Click the blue PatientName column heading; it will be outlined in green.
- 33. Click the Sort & Filter menu, and then click the option to Sort A to Z.

F
PatientName
admission, medicare
amaze, six



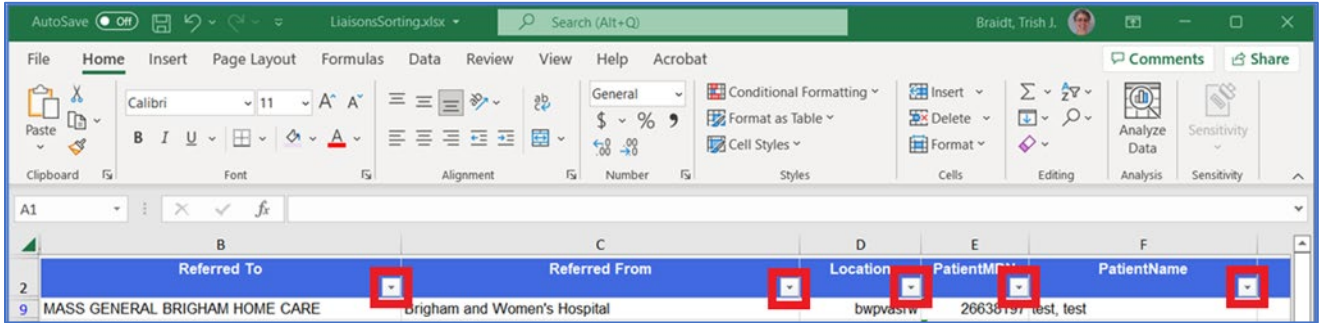
- 34. For each patient on the filtered list, please look at Discharge Summary on acute side. If indicated that patient went home with Mass General Brigham Home Care, we need to secure the visit.



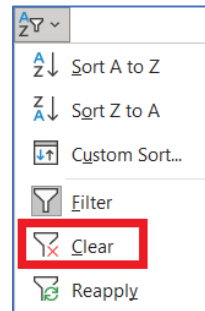
4Next Tip Sheets – MGBHC monitoring report

Finding next-day discharges with SOC that need registration and/or orders

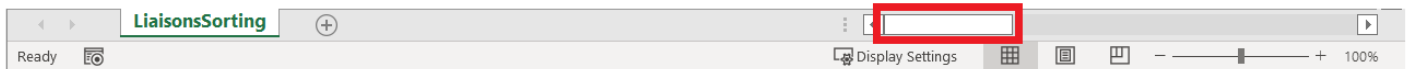
1. If you haven't already, generate the report, export into Excel, and then turn on filters.



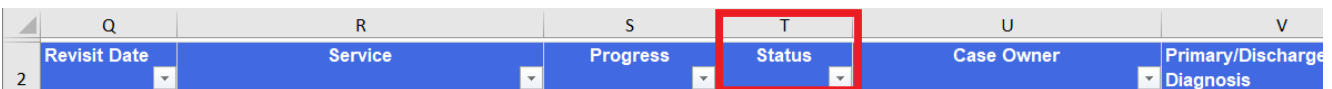
2. If you applied other filters already for a different task, clear them by clicking the Clear option on the Sort & Filter menu on the Edits section.



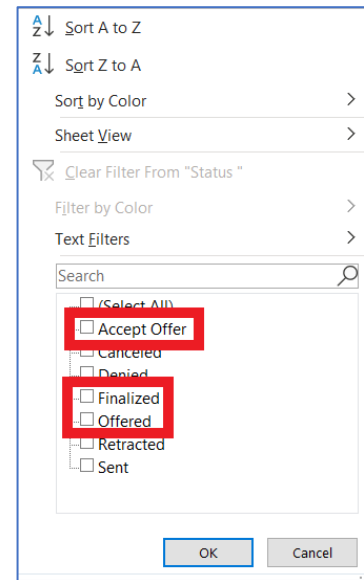
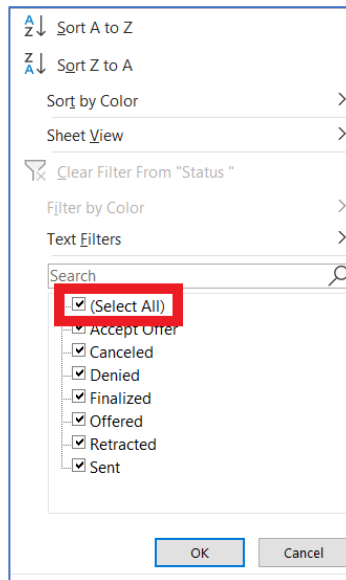
3. Scroll by clicking and dragging the horizontal scrollbar handle (highlighted below) to the right.



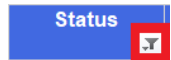
4. Watch the column headings. Stop scrolling when you can see the Status column (T).



5. Click in the Status column. The Sort & Filter menu opens.
6. Click to uncheck the (Select All) option.
7. Click to check the following options:
 - Accept Offer (by the sender)
 - Finalized (by the sender)
 - Offered (by MGBHC)
8. Click the OK button.



The column is flagged to show that it's filtered:



The report shows only referrals where MGBHC is offering to take the patient, or the sender has accepted or finalized the offer.

Continued on next page

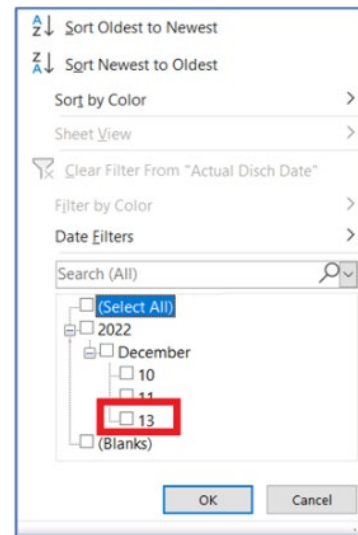
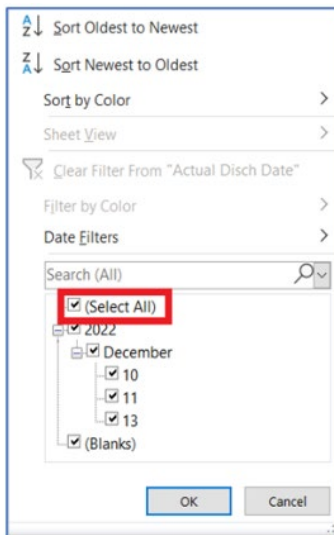


4Next Tip Sheets – MGBHC monitoring report

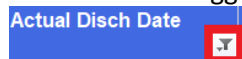
9. Watch the column headings. Stop scrolling when you can see the dates, in columns L through Q:

L	M	N	O	P	Q
Admit Date	Expected Disch Date	Actual Disch Date	SOC	ROC	Revisit Date

- Click in the Actual Disch Date column. The Sort & Filter menu opens.
- Click to uncheck the (Select All) option. (This unchecks all the dates, as well as the Blanks option.)
- If needed, scroll down the list to find tomorrow's date.
- Click to check for tomorrow's date (12/13 in example).
- Click the OK button.



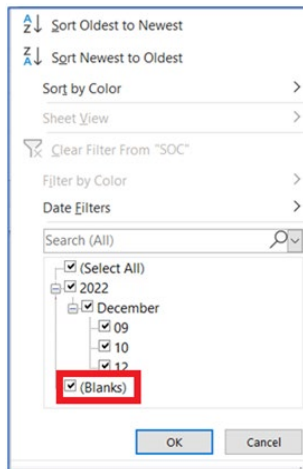
The column is flagged to show that it's filtered:



Only relevant cases that have an Actual Disch Date are shown on the report.

- Click in the SOC column. The Sort & Filter menu opens.
- If needed, scroll down to the bottom of the list.
- Click to uncheck the (Blanks) option.
- Click the OK button.

The column is flagged to show that it's filtered:



Now you have a list of patients, whose Actual Disch date is tomorrow (12/13/2022 in this example), who have a SOC date.

	I	J	K	L	M	N	O	P	Q
	City	State	Zip	Admit Date	Expected Disch Date	Actual Disch Date	SOC	ROC	Revisit Date
2									
38	franklin	MA	02038	12/5/2022		12/12/2022	12/13/2022		
82	queens village	NY	11427	12/11/2022		12/12/2022	12/13/2022		
	somerville	MA	02145	12/1/2022		12/12/2022	12/13/2022		

19. Scroll by clicking and dragging the horizontal scrollbar handle to the right. ⇨

20. Watch the column headings. Stop scrolling when you can see Progress, in column S:

	Q	R	S	T	U	V
	Revisit Date	Service	Progress	Status	Case Owner	Primary/Discharge Diagnosis
2						
38			PT	REG; ORD;	Confirmed	Olivia Bedard
						Knee replacement

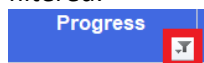
Continued on next page



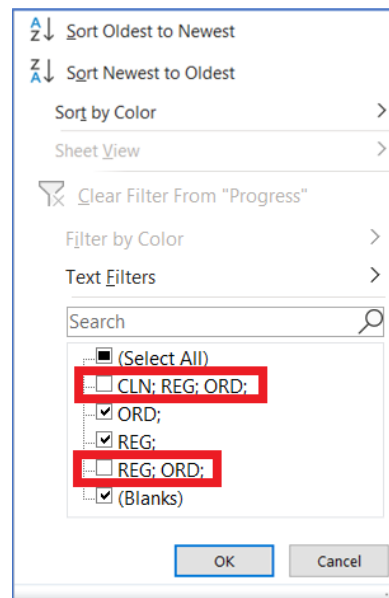
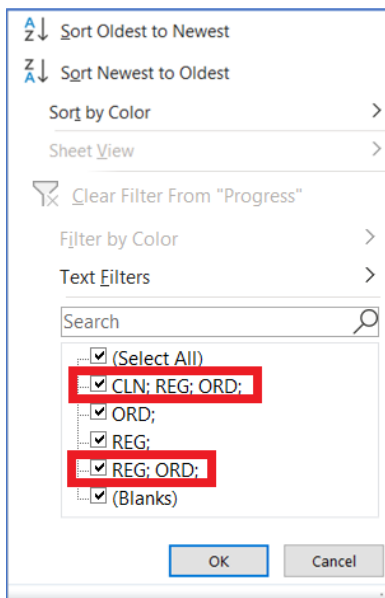
4Next Tip Sheets – MGBHC monitoring report

21. Click in the Progress column. The Sort & Filter menu opens.
22. Uncheck any box that has both REG and ORD. Scroll down if need, to review every item
23. Click the OK button.

The Progress column is flagged as filtered:



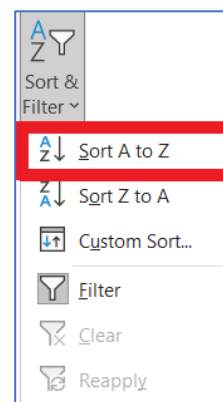
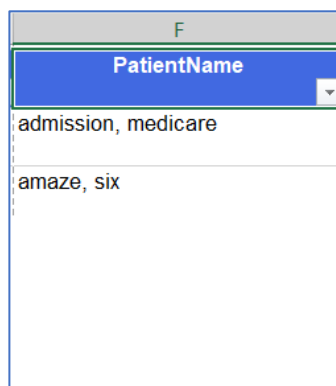
All active and finalized cases with an actual discharge date and an SOC for tomorrow, that are missing REG, ORD, or both REG and ORD, are shown in the report.



24. Scroll to see the PatientName column (F), by clicking and dragging the horizontal scrollbar handle to the left .

	E	F	G	H	I	J	K	L
	PatientMRN	PatientName	DOB	Insurance	City	State	Zip	Admit Date
2	97446298	pasta, ravioli	04/12/1989	self	queens village	NY	11427	12/11/2022
82	8000127	radvalidate, elsa	09/14/1965	blue cross blue shield	somerville	MA	02145	12/1/2022
100	97458509	upgittwoninesixthree, epichom	01/29/1985	harvard pilgrim	braintree	MA	02184	11/15/2022
136								
146								

25. Click the blue PatientName column heading; it will be outlined in green.
26. Click the Sort & Filter menu, and then click the option to Sort A to Z.



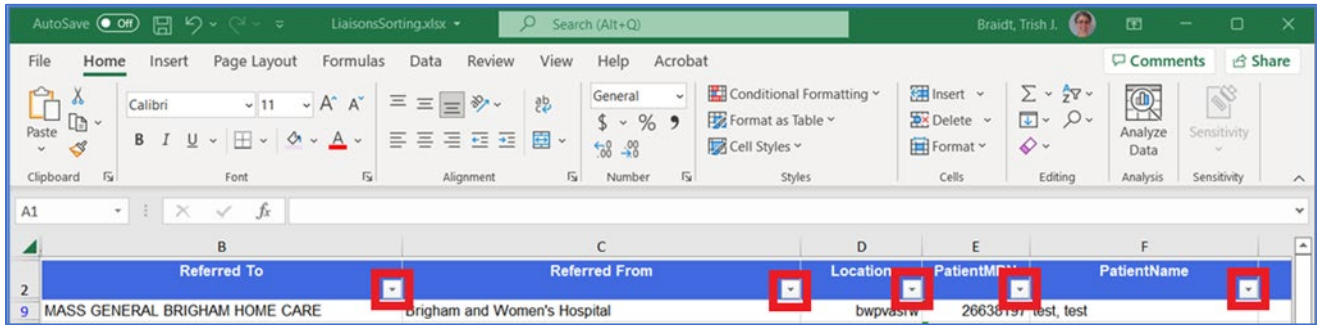
27. Go to 4Next Referrals Received list and add the Finalized filter. For each patient on the report, check the referral on the Referrals Received list.
 - If Orders Received on the checklist is not checked:
 - a. Click No to turn the switch to Yes.
 - b. Click the SAVE button.
 - If the SEND TO ADMISSIONS button is active (blue) and there is no time stamp indicating the date and time the referral actually went into Epic, click the SEND TO ADMISSIONS button.
 - If the SEND TO ADMISSIONS button is inactive (gray), but there's no date, the referral was sent and is waiting in a queue. Once it actually goes into Epic, the timestamp will appear, and the REG indicator will appear in the Progress column in Referrals Received. Next time you run the report, REG will appear in the Progress column.



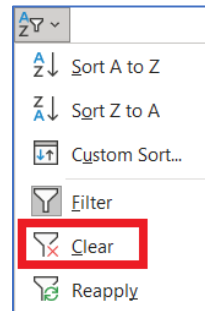
4Next Tip Sheets – MGBHC monitoring report

Checking expected discharge dates

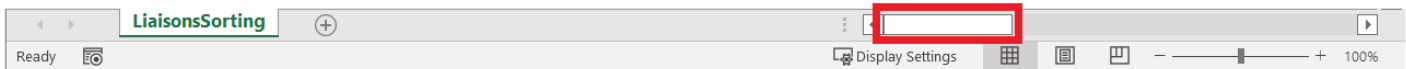
1. If you haven't already, generate the report, export into Excel, and then turn on filters.



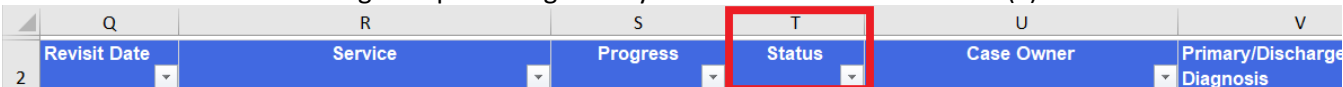
2. If you applied other filters already for a different task, clear them by clicking the Clear option on the Sort & Filter menu on the Edits section.



3. Scroll by clicking and dragging the horizontal scrollbar handle (highlighted below) to the right. →



4. Watch the column headings. Stop scrolling when you can see the Status column (T).



5. Click  in the Status column.

The Sort & Filter menu opens.

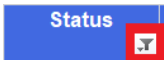
6. Click to uncheck the (Select All) option.

7. Click to check the following options:

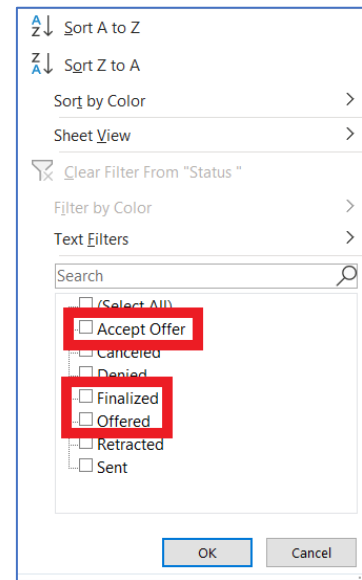
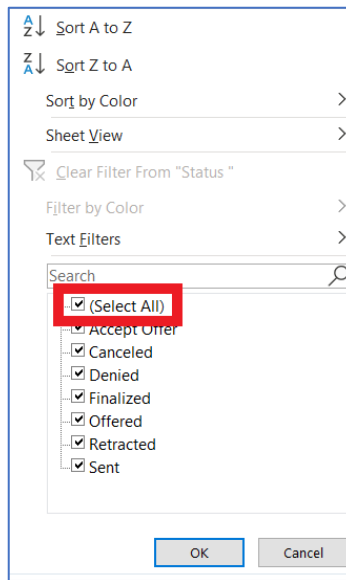
- Accept Offer (by the sender)
- Finalized (by the sender)
- Offered (by MGBHC)

8. Click the OK button.

The column is flagged to show that it's filtered:



The report shows only referrals where MGBHC is offering to take the patient, or the sender has accepted or finalized the offer.



Continued on next page



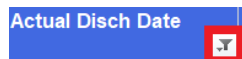
4Next Tip Sheets – MGBHC monitoring report

9. Scroll by clicking and dragging the horizontal scrollbar handle to the left. ←
10. Watch the column headings. Stop scrolling when you can see the dates, in columns L through Q:

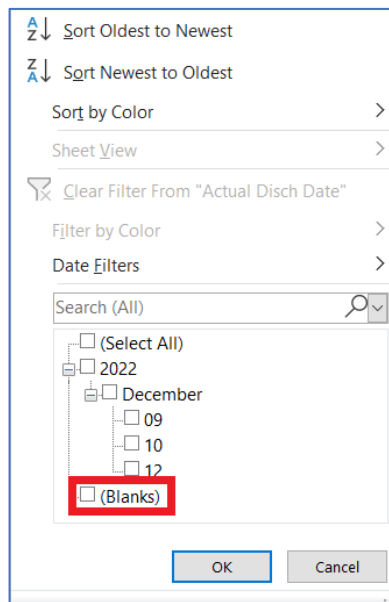
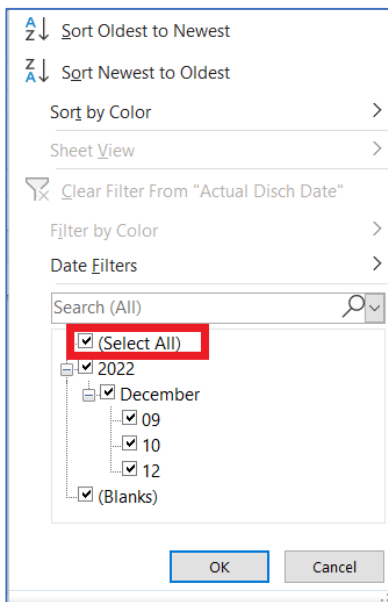
L	M	N	O	P	Q
Admit Date	Expected Disch Date	Actual Disch Date	SOC	ROC	Revisit Date

11. Click in the Actual Disch Date column. The Sort & Filter menu opens.
12. Click to uncheck the (Select All) option. (This unchecks all the dates, as well as the Blanks option.)
13. If needed, scroll down to the bottom of the list.
14. Click to check (Blanks).
15. Click the OK button.

The Actual Disch Date column is flagged as filtered:

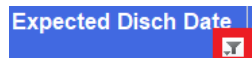


All relevant cases that do not have an Actual Disch Date are shown on the report.



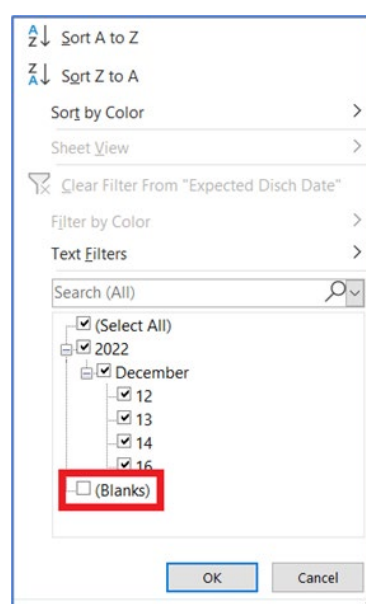
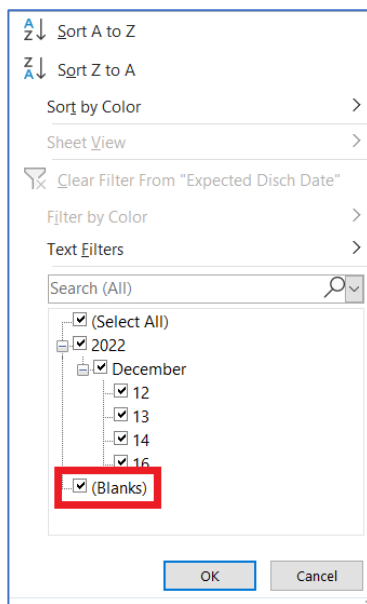
16. Click in the Expected Disch Date column. The Sort & Filter menu opens.
17. If needed, scroll down to the bottom of the list.
18. Click to uncheck the (Blanks) option.
19. Click the OK button.

The column is flagged to show that it's filtered:



All relevant cases that do have an Expected Discharge Date are shown on the report.

Note: To focus on expected discharges for today, uncheck Select All, and then check off today's date.



	J	K	L	M	N	O	P	Q	R
2	State	Zip	Admit Date	Expected Disch Date	Actual Disch Date	SOC	ROC	Revisit Date	Service
3			02/25/2021	12/13/2022		12/14/2022			
6			01/08/2021	12/14/2022					Re
11	ma	02115	09/22/2020	12/12/2022					

Continued on next page



4Next Tip Sheets – MGBHC monitoring report

20. Scroll to see the PatientName column (F), by clicking and dragging the horizontal scrollbar handle to the left.

	E	F	G	H	I	J	K	L
	PatientMRN	PatientName	DOB	Insurance	City	State	Zip	Admit Date
2	8003695	admission, medicare	02/22/1931	medicare				02/25/2021
3	8006996	amaze, two	02/14/1978	self				01/08/2021
6	8006877	atplzeroonenine, epicprdcopydowntwentytwenty	06/10/1986	self	boston	ma	02115	09/22/2020
11	97428296	bwh, epictst	09/08/1967					02/27/2022
21	97436133	bwh, fiftyfive	02/02/1978	self	somerville	ma	02143	02/26/2021
22	97436125	bwh, fiftyfour	01/01/1965	self	somerville	ma	02143	02/26/2021
23	97436141	bwh, fiftysix	03/03/1980	self	somerville	ma	02143	02/26/2021
25	97436117	bwh, fiftythree	02/02/1950	blue cross blue shield	somerville	ma	02143	02/26/2021
26	97481758	fnext, confirmedpretwo	10/19/1995	self				
44	8001701	fnextperf, hsix	10/11/1985	blue cross blue shield	boston	MA	02115	03/08/2022
47	8008832	hodrover, test	01/01/2010	self	boston	MA	02111	05/13/2022
50								
146								

21. For each patient on the filtered list, check to see if the patient is going as planned.

- Check the most recent nursing and MD notes in Epic, which should give an indication if patient is going.
- For expected discharges for today, if the nursing and MD notes aren't clear, contact the patient's nurse via Voalte to ask if the patient is going as planned.

22. If the expected discharge date is not correct, go to the 4Next Referrals Received list, and add the Finalized filter. Update the PAA on the Details view of the referral. See [Completing the PAA](#).