Ownership, co-ownership, and notifications

You'll receive the notifications you set up in your profile only when you're the owner or co-owner of a case. Epic In Basket functionality was not carried over; set up email notifications if needed. The current owner's is the name that appears on the referral on the provider's side.

Float staff with short term oversight can use the co-owner ♥ on the Manage view to quickly add & remove themselves from cases. To update co-ownership for more than one case at a time, use the Manage Co-Ownership option under the Management menu in 4Next standalone.

You can't both own and co-own a case. If the ♥ is red, you're a co-owner, if it's white you're not; if it's not there, you're the case owner. When you're the owner or co-owner, you'll see the case in Cases Sent in standalone 4Next; when you're not an owner or co-owner, you won't see it.

Ownership and co-ownership can be updated for more than one case at a time: The options are under the Management menu in 4Next standalone.
- Transfer Cases By User: Select the current owner, and then re-assign one or more to another owner who is authorized for the site.
- Transfer Case Ownership: Selected an Epic patient list, and then re-assign one or more to another owner who is authorized for the site.
- Manage Co-Ownership: Select a co-owner, and then check to add or uncheck to remove co-ownership.

To view a list of the patients you own and co-own, go to 4Next standalone. It's in your ⊞ > Applications folder. Epic will no longer allow us to display the case list inside a patient encounter.

To find a patient who's not yours in the Cases Sent list in standalone 4Next:
1. To see all cases for your site, click X on the green Owner filter.
2. Type the MRN, or the *last name, first name*, and press enter to find a patient.

You don't have to take yourself off of a finalized case. Once it's finalized, it will be hidden on the Cases Sent list by default. Cases with a Finalized status won't show unless you add the filter. You'd need to do that to find prior placements, or to un-finalize (re-open a need) if something didn't work out.

Managing referrals

Always go through all 3 steps of sending. 1 - Review the referral providers you're sending to. 2 - Update the message. 3 - Proactively share documents and attachments that will be needed. For online providers, share the Discharge Info document along with the Facesheet and Referral Summary, and flip the switch to Share attachments before you send. Sharing documents & attachments after you send has to be done one provider at a time.

Don't flag messages as a Priority unless they need immediate attention.

Use the Communicate view of the case to message multiple providers at the same time.

Use the status filters in the Manage view of a case to focus on 'actionable' referrals. Uncheck the Sent and Received statuses to more easily find Accept Pending providers who are looking for documents and information, as well as the providers who have Offered and are waiting for you to Accept Offer.

Progress the status of every case in a timely manner. Don't leave a referral in Offered status when you intend to send the patient to that provider. If you're working with a fax-enabled provider, update the status as needed, especially when they make an offer, and when you accept it.

Cancel needs that are no longer needed. This retracts referrals and helps free up provider resources, and also unclutters your Manage view. You can always re-open the need, and send the referrals out again.

Mass General Brigham

Finalizing

Finalize all of your cases. Some sites leave this to the case manager, and others rely on resource specialists. 4Next does not automatically finalize cases.

Make a habit of finalizing. Once a day, launch 4Next standalone from Applications, and click X to remove all filters except Owner (your name) and Confirmed. Go down the list, and if the case has a discharge date (it will be red text), finalize.

Clean up by canceling before you finalize. You don't want to Finalize a referral that you don't intend to use. 4Next WILL NOT PREVENT YOU from finalizing multiple conflicting referrals. If you've got a case that you couldn't predict and accepted offers for a SNF, LTAC, inpatient rehab, home care, and home hospice, 4Next will let you finalize all of them. That would not be good.

Revisits to Mass General Brigham sites – if a case isn't finalized, a new referral for that patient cannot be started. This is not new functionality.

Need some help? You can definitely Help yourself

Click Help in the top level menu for information on the things you can do, right where you are. The online Help for 4Next is context-sensitive! You'll find step-by-step instructions for every task.

Mass General Brigham