



Guide to referral and case statuses for case management

Referral status	What you can do
Draft	Send the referral Remove the referral
Sent	Message the provider Retract the referral For a Fax provider, to progress the case based on communication with the provider outside 4Next, set the status as applicable: Receive Referral, Accept Pending, Offered, or Deny Referral
Received	Message the provider Retract the referral
Accept Pending	Message the provider Retract the referral
Offered	Accept Offer the offer (you can accept only one offer per need) Message the provider Retract the referral
Accept Offer	Message the provider Retract the referral
Denied	Message the provider
Canceled	Message the provider (<i>Provider</i> has canceled an Accept Offer referral)
Retracted	Message the provider Send the referral
Removed	Send the referral
Finalized	Re-open the need Can be done within 5 days of finalizing the case; no time limit if the case is not finalized

Case status	What you can do
New	Add need(s), save referrals as drafts, send referrals Cancel the case
In Process	Add need(s), save referrals as drafts, send referrals Add providers for a need Message providers Finalize any need with an Accept Offer referral Retract sent referrals Cancel need(s) Cancel the case
Awaiting To Confirm	Accept Offer for the need that has at least one Offered referral
Confirmed	Finalize the case Cancel the need with the Accept Offer referral Cancel the case
Finalized	Within 5 days of finalizing the case (not the need), re-open the need
Canceled	Re-open the case (<i>Sender</i> has canceled the case)