Transfer Case ownership by Epic lists

> You can change the ownership for more than one case at a time with this utility. Cases are listed for the selected Epic list, and one or more cases can be re-assigned to another owner who is authorized for the site.

> If you haven't already, click **Management ▾** on the main menu, and then click the option to Transfer Case Ownership.

Transferring one or more cases

1. Each Mass General Brigham site you're authorized for in 4Next is listed on the left as an Entity. Click an Entity item to expand the list and display the available second-level Epic lists.
2. Click a second-level list to display the available patient list items for that second-level list.
3. Click a patient list item to display its active cases on the right.

   - The default sort is by location. To sort by a different parameter, click a column heading.
   - To reverse the sort order, click the column heading again.

4. All of the active cases are selected ☑ by default.

   - To select only a few cases, click the top checkbox to deselect ☐ all, and then click to check ☑ the cases you want to change.
   - To deselect one case, click to clear ☐ its checkbox.

5. Click to select the future owner from the Select a new owner drop-down list. To move through the list quickly, open it and then press the key for the first initial of the last name.
6. Click **SAVE** .

ⓘ The previous and new owners are paged when they're added or removed from a case. Transferring ownership initiates pages for each individual case, one to previous owner and one to new owner.

ⓘ New owners are automatically removed as co-owner when applicable.