Getting the most out of online help for 4Next

Context-sensitive help: Simple topics

In 4Next, you can access the online help by clicking **Help** on the main navigation menu. The help opens in a new browser window, on the right side of the 4Next application. The topic you see by default is about the area you're in, because the help is context-sensitive.

Context-sensitive help side-by-side with a case summary

For a simple view, such as the Case Summary, the context-sensitive help tells you a few things:

- How to get to the case summary from anywhere else (shown above)
- If applicable, how to find something else that's related—in this case, prior placements (shown above)
- What's included in the case summary (shown on right)
- How to print the case summary, step-by-step (shown on right)
- What related help topics you might find useful, under the See also heading, with links (shown on right)

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Context-sensitive help: Most common task, and other possibilities

For some 4Next views, there are a few tasks you can complete, but one is more likely or important than the others. A good example is the Manage view for a referral. For this case, the help starts by telling you how to get where you are. The second section is a step-by-step for that most important task; in the example below, that's responding to a referral request.

Context-sensitive help side-by-side with a referral management

Other tasks are grouped together by type, with links to the step-by-step instructions for each one. The last section, under the See also heading, lists related help topics you might find useful, with links.

Messages and notes

- Reading & responding to messages
- Adding & reading office notes
- Adding & reading physician's review and admission determination notes

Referral checklist, summary, & audit

- Completing & editing the referral checklist
- Viewing & printing the referral summary
- Running the referral audit

See also

- Working with referral details
- Working with referrals received
- Referral Statuses

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Context-sensitive help: "What do you want to do?"

If you're working in a view where there are a lot of things you could be doing—managing a case, or running a provider search, for example—the Help will give you a list of things that you could be doing in that space. It starts, like most of the help topics, by telling you how to get to case management from anywhere else. Tasks are grouped together by type, with links to the step-by-step instructions for each one. The last section, under the See also heading, lists related help topics you might find useful, with links.
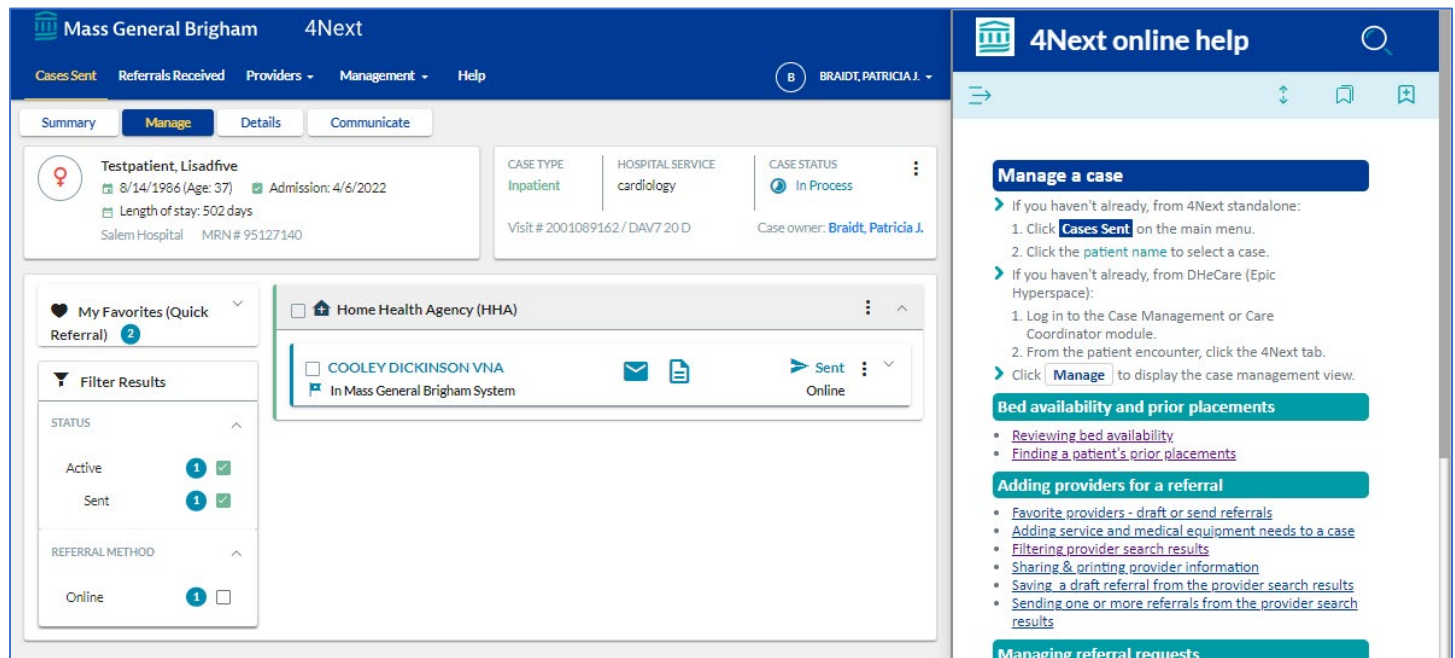
Context-sensitive help side-by-side with a case management view

Mini-contents

By default, the help launches in a narrow browser window. If you widen the window, another pane opens to the right of the help topic. Under In This Topic you'll see mini-contents, a list of the sections in the help topic. Clicking a link in the mini-contents automatically scrolls the topic to bring that section into your view. This can be useful for those long "What do you want to do?" topics.
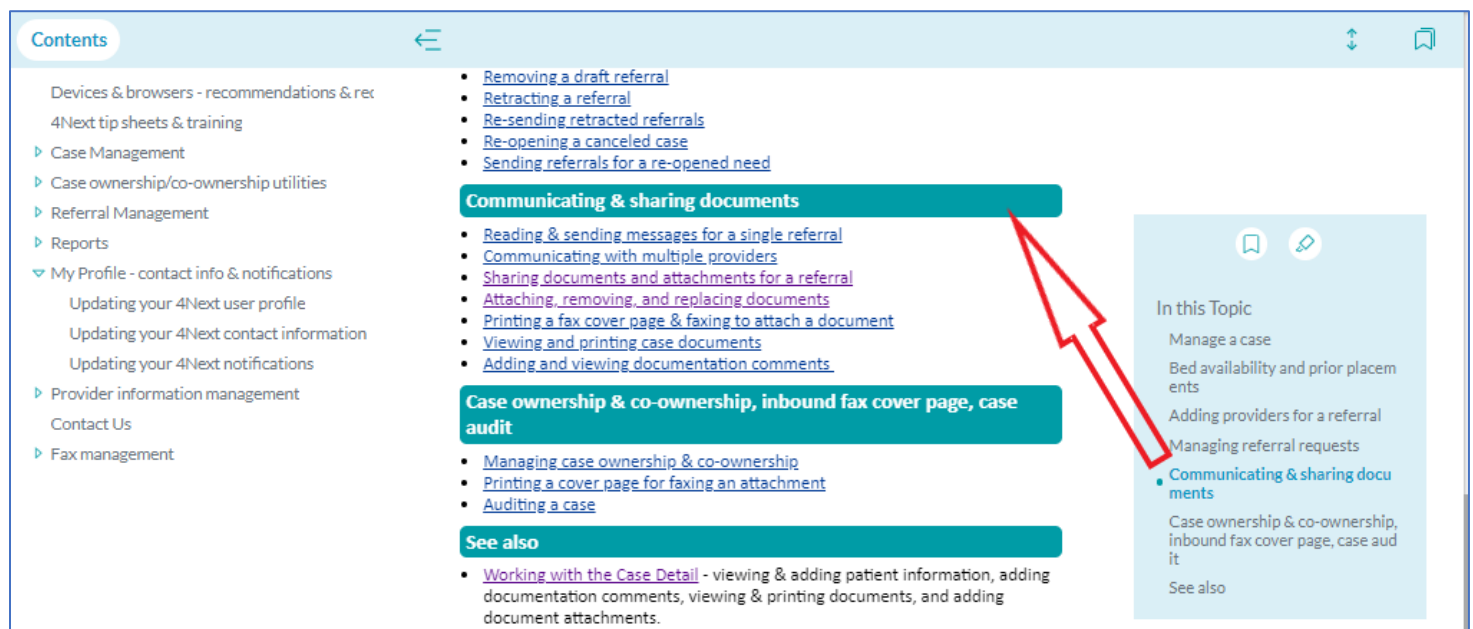
Section selected in the mini-TOC for a long topic

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Browse

The help also has a Contents list, organized like the table of contents in a book, which you can browse through for topics of interest to you. When the browser window for the help is narrow, you can display the contents by clicking the panel shifter in the upper left:
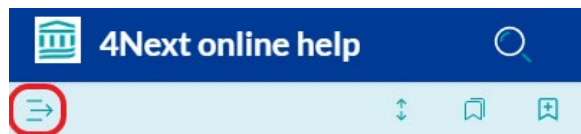
The help topic slides over so the Contents are shown. Clicking ⇐ in the upper right shifts Contents to the left, and puts the help topic back into the center.
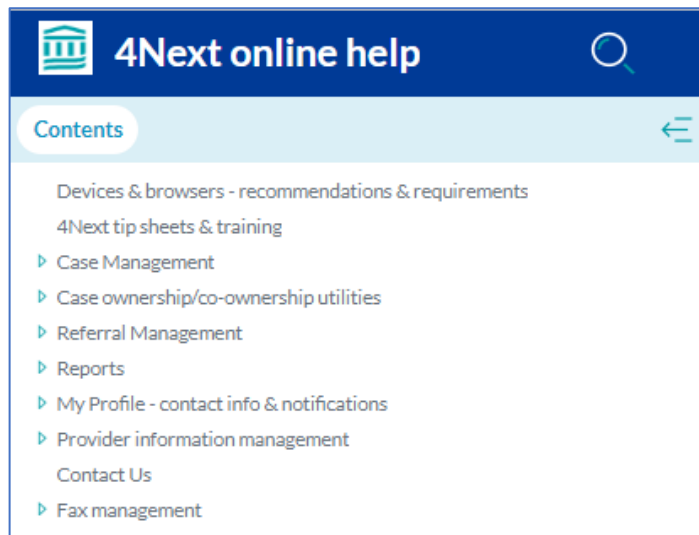
If you make the browser window wider, you'll see the Contents to the left of the topic.
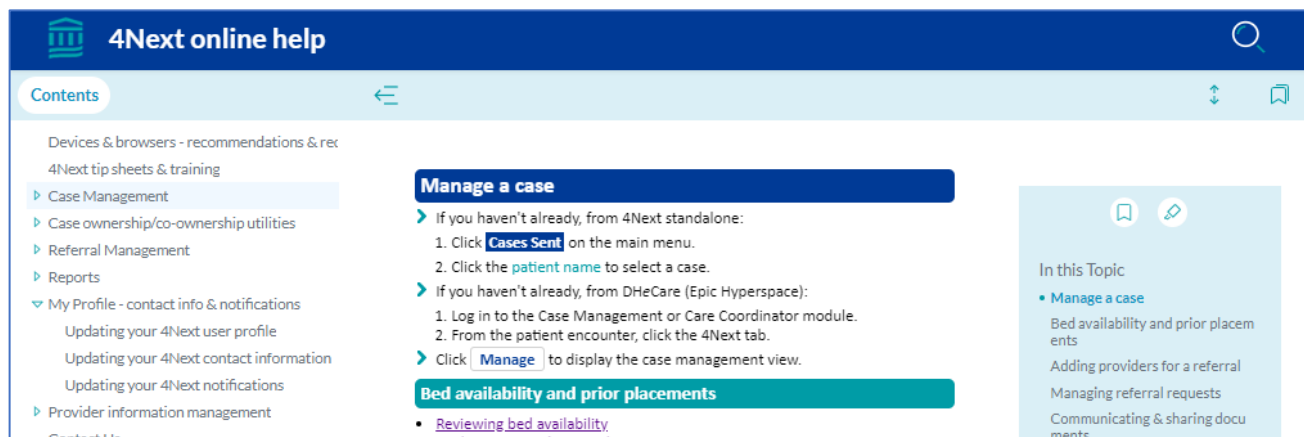
Click any item with a ▷ to display the links for related topics. The opened item then has a ▽ .
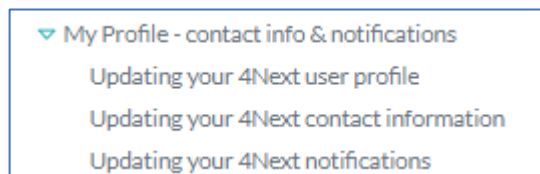
Click a link to display the topic.

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Search

If you're looking for specific information, you can always search the help after you open it.

1. Click the magnifying glass in the upper right: **4Next online help** ⊙

2. Type what you're looking for in the text field that opens. As you type, the help displays a drop-down list of possible matches.

    ⊙ pcrf   ✕
    pcrf

3. Click an option to display a list of matching topics, and then click the blue topic title link to open the topic.

    ✕ 3 result(s) found for 'pcrf'

    Working with referral details

    Care Referral Form (**pcrf**) with the Referral to Home Health HOMEBOUND Order (when applicable), Provider requests-entity.htm

    Viewing and printing case documents

    Care Referral Form (**pcrf**) with the Referral to Home Health HOMEBOUND Order (when applicable), Provider cases-entity_documents.htm

    Working with the patient Case Detail

    Care Referral Form (**pcrf**) with the Referral to Home Health HOMEBOUND Order (when applicable), Provider

Favorites

If you have some tasks that you need a reminder how to get started or get through, especially if it's something you don't do very often, you can look it up in the help, and then save it as a favorite.

When you have the browser open to three panes, click ▢ in the mini-TOC. The topic is tagged ▮.

If the browser window is narrow and the topic is showing, click ⊞ in the upper right. The topic is tagged ▣.
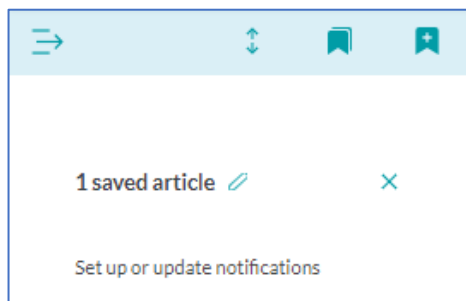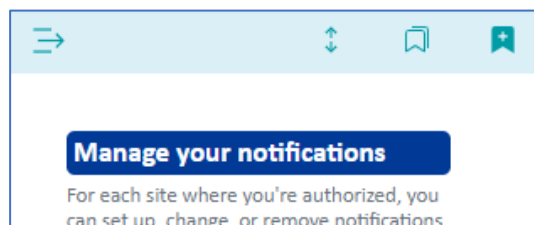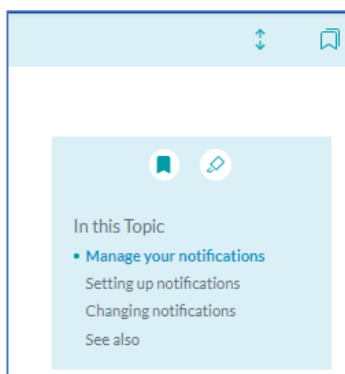
To display the links to your favorites, click ▯. In a wide browser, your favorites list replaces the mini-TOC; in a narrow browser, it replaces the help topic.

Click an item in your favorites list to display the topic.

Click ▮ or ✕ to toggle back to the previous view.

Getting the most out of online help for 4Next

Tip sheets and training

There's a library of PDF documents that include best practice recommendations, as well as workflows for staff with specific, limited interaction with 4Next. The library also provides links to the individual task-based modules from the eLearning courses, so you can get a refresher after you've gone through the training. In addition, Mass General Brigham staff can directly access the 4Next training in HealthStream. Non- Mass General Brigham users can get to the eLearning tip sheet, which includes a link to the online training and attestation form. For new users, there are links to the practice goals pages (more on these, next).

To pull up the Tip sheets and training page, search for *tip sheets*, or click the second link in the help Contents, 4Next tip sheets & training.

Tip Sheets and training for 4Next

Our best practice tip sheet offers advice to streamline the process of managing cases with 4Next. Workflow tip sheets are intended for staff with specific, limited interaction with 4Next. The individual eLearning activities for the online training are linked below. Online eLearning courses for 4Next are available in HealthStream for all Mass General Brigham staff. For users outside the Mass General Brigham system, the online eLearning and video demonstrations are available via 4Next.

Case Management Tip Sheets

> Best practices for case management
> Guide to referral and case statuses for case management
> Transferring case ownership by Epic list for case management resource specialists
> Transferring case ownership by user

Referral Management Tip Sheets

> Providing the Physician's Review and Admission Determination for Referrals Received
> Viewing Referrals Received – All referrals with unread messages
> Working with the Home Care Pre-admission Assessment and the IRF/SNF/LTAC Screening forms -
>   changing font size, finding your place, and using the keyboard
> Spaulding users:

Practice Goals

There are 3 types of practice goals: for case management, for receiving referrals, and for adding OUT cases. To find them, search for *goals*, or scroll to the end of Tip sheets and training, and then click the applicable link.

Practice goals can help new users pick up the most important workflows for 4Next. Each page includes a link to a PDF checklist of the tasks for the job. The items on the checklist are matched with a list of links to brief, silent video demonstrations. These brief, silent videos can show you how it's done, as you practice doing it on your own.

Practice Goals - Referrals Received

Checklist: Practice Goals - Referrals Received (PDF). Click the link to open.

Video demos - how to

1. Click a link to display the demo. It will open in the Stream browser application, in a new window.
2. Move the mouse over the video and click ⤢ to view in full screen.
3. Click ▷ to play.
4. To close the full screen, press the ESC key, or click ⤓.
5. To hide the demo, click the link again.

Getting started & working with referrals received

> Set up your notifications
> Set up your preferences
> Find out if you have access to more than 1 site; if you do, select a site
> Find the youngest patient in the list (sort by DOB)
> Find a referral from a notification
> Remove the patient name filter
> Cases Sent authorized users only: Make yourself a co-owner of some cases that your CM owns
> Cases Sent authorized users only: Filter by My Referrals

Communicating

> Display all referrals with unread messages, including those

Step-by-step instructions

The online help includes step-by-step instructions for every task you can complete using 4Next. When available, the instructions include a link to the brief, silent video demonstration for the task.

Setting up notifications

▷ Video: Set up your notifications

1. Click to select a provider from the drop-down list. (Sites with initial capital letters send referrals; sites in all caps receive referrals.)
2. For the type of notification you want—email, pager (referral senders only), or text (referral recipients only)—click **ADD**. The Add Subscription popup displays.
3. For email, if you want to use an address other than the one in your Profile contact information, click to turn the switch off ⚪, and then type the email address to use for notifications.
4. Click **SAVE** to confirm you want notifications sent as described.
5. If you want notifications by both available options, repeat the process above for the other.
6. By default, all the referral events are off ⚪. Click the switch for an event to turn on notifications ⚫. If both methods are set up, notifications are sent by both for all of the events that are on.