

Practice Goals - Case Management

Your task		Your buddy should
Getting started		
<input type="checkbox"/> Set up your notifications		
<input type="checkbox"/> Note the Name, MRN, and DOB for your patient		
<input type="checkbox"/> Set the list to show everyone's cases		
<input type="checkbox"/> Find your patient by MRN		
<input type="checkbox"/> Set up members of Mass General Brigham as your favorite providers		
<input type="checkbox"/> Make your buddy a co-owner of your case		
		Filter by My Referrals
<input type="checkbox"/> Add your buddy's site(s) to your favorites		
Searching for providers and sending referrals		
<input type="checkbox"/> Send a referral from your favorites to your buddy's site. Do not share attachments or change the clinical documents (share the Face Sheet and Referral Summary only)		
		Receive a New referral with Face Sheet and Referral Summary only
<input type="checkbox"/> Workflow: Add 2 needs to your case drafting at least 1 referral for each need, with online providers saving at least 1 provider to your favorites printing the selected providers to PDF		
<input type="checkbox"/> 1. Add 2 needs to your case (different from your buddy's)		
<input type="checkbox"/> 2. Limit the providers to Online only		
<input type="checkbox"/> 3. While searching for providers, make at least 1 a favorite		
<input type="checkbox"/> 4. Select at least 1 provider for each need		
<input type="checkbox"/> 5. Prep to share the list of providers you're selecting (Print ▼ > Print Selected > Save)		
<input type="checkbox"/> 6. Draft referrals to at least 2 sites (okay to send if you prefer)		
<input type="checkbox"/> Send your draft referrals		
<input type="checkbox"/> Add at least 1 provider for the need your buddy's in		
		Set the referral status to Accept Pending
Communicating		
<input type="checkbox"/> Send a message to your buddy's site		
		Receive a message
<input type="checkbox"/> Send a message to at least 2 sites at the same time		
<input type="checkbox"/> Add Medications to the clinical documents your buddy gets		
<input type="checkbox"/> Add a PDF attachment (any PDF you have is okay)		
<input type="checkbox"/> Share attachments with your buddy		
		Receive a message for each document (meds & attachment), and see both documents
		Set the referral status to Offered
<input type="checkbox"/> Accept the offer from your buddy		
		Receive a message
Cancelling and re-opening a case		
<input type="checkbox"/> Cancel your case		
		Referral is retracted
<input type="checkbox"/> Search for your case by MRN		
<input type="checkbox"/> Show canceled cases		
<input type="checkbox"/> Re-open the case		
<input type="checkbox"/> Resend the retracted referrals		
		Set the referral status to Offered
<input type="checkbox"/> Accept the offers for 2 needs		
Finalizing and re-opening		
<input type="checkbox"/> Cancel the needs that aren't confirmed (accept offer)		
<input type="checkbox"/> Finalize the need		
		Referral finalized, not on active list
<input type="checkbox"/> Re-open the need that you finalized		
<input type="checkbox"/> Resend the retracted referrals		
<input type="checkbox"/> Finalize the case		