❯ If you haven't already:

1. Click **Referrals Received** on the main menu.

2. Click the patient name to select a case.

3. Click DETAILS on the Referral Management view.

Viewing comments

Comments in the referral detail are entered by the sender to provide an update on the current status of the clinical documents and attachments. Comments are view-only.

Viewing or printing a clinical document (Mass General Brigham inpatients only)

For Mass General Brigham patients only, clinical documents for the visit are automatically linked to the case when available. (The Documents section is not shown for OUT patients.) These include case management notes, discharge information, the EMD (Early Maternity Discharge) form, the face sheet, the medications list, operative notes, PT/OT/ST (physical, occupational, and speech therapy) notes, and the referral summary. Any or all or none of the available clinical documents can be selected when setting up the referral, to be included when sending it to the chosen service providers. The documents are updated in real time.

❯ Documents and attachments are the last two sections in the case Details. Scroll down to view what's available.

❯ To view an item:

1. Click 🔼 in the bottom left of its card. The document opens in a popup window.

2. Click ✕ to close the popup.

❯ To open an item as a ready-to-print PDF:

1. Click 🖨 in the bottom left of its card. The document opens in a popup window. From there, you can print or save a copy.

   - Every page includes a heading with patient identification and case owner contact information.
   - Every page includes a footer with "Extracted from the Legal Health Record and printed on " and the date and time stamp, plus "Mass General Brigham Incorporated Clinical data printed from 4NEXT - Confidential" and the page number and page count.

2. Click ✕ to close the popup.

❯ To print more than one item at a time, as a single PDF:

1. Click ☐ on the document card to select one or more; click ☐ Select all in the Documents heading to check ☑ every document.

2. Click 🖨 on the Document heading. 4Next collates the selected items into a single PDF. The document opens in a popup window. From there, you can print or save a copy.

   - Every page includes a heading with patient identification and case owner contact information.
   - Every page includes a footer with "Extracted from the Legal Health Record and printed on " and the date and time stamp, plus "Mass General Brigham Incorporated Clinical data printed from 4NEXT - Confidential" and the page number and page count.

2. Click ✕ to close the popup.

Viewing and printing case attachments

❯ To open an attachment as a ready-to-print PDF:

1. Click 🖶 in the bottom left of its card. The document opens in a popup window. From there, you can print or save a copy.

2. Click ✕ to close the popup.

❯ To print more than one attachment at a time, as a single PDF:

1. Click ☐ on the document card to select one or more; click ☐ Select all in the Attachments heading to check ☑ every document.

2. Click 🖶 on the Document heading. 4Next collates the selected items into a single PDF. The document opens in a popup window. From there, you can print or save a copy.

3. Click ✕ to close the popup.

Adding or removing a case attachment

❯ To be attached in 4Next, a file must be saved as a PDF. You must have the file available to the device you're working on, and you can only attach one file at a time.

1. In the 🔗 Site Attachments section, click ☁ in the upper right. The Add Case Attachment popup opens.
2. Click to select an option from the Category drop-down list.
3. Click [Choose File], and then browse to the .pdf file you want to attach.
4. Click [Open]. The file name displays next to the Choose File button.
5. Click SUBMIT .

❯ To remove a site attachment, click 🗑 in the bottom left of its card.

View & print the SRN screening form (PAS)

❯ If you haven't already:

1. Click **Referrals Received** on the main menu.
2. Click the patient name to select a case.
3. Click DETAILS on the Referral Management view.
4. Click SCREENING FORM .

The screening form is restricted to Spaulding sites. There are different forms depending on the type of continuing care offered by your site.

Printing the form

1. Click PRINT .

   The document opens in a popup window. From there, you can print or save a copy.

2. Click ✕ to close the popup.

🏛 **Mass General Brigham**