Add an Initial CMS-2728 Form

1. From the CROWNWeb Home Page, click **Patients**. The Search for Patients screen displays.

2. Enter your search criteria, and then click **Search**. The Patient Search Results screen displays a list of patients matching your search criteria.

3. Click the CROWN UPI for the desired patient. The View UPI Attributes screen displays.

4. Click **2728** in the gray sub-menu. The Manage 2728 Forms screen displays.

5. Click the **Add 2728** button in the Eligible 2728 Forms section. The Add an ESRD Medical Evidence (2728) screen displays.

6. Enter the required information in Sections A and B (Section C is for transplant facilities), then click **Save**. The message “**Form 2728 was saved**” displays.

7. Scroll to the bottom of the screen and click **Print**. The report viewer displays the CMS-2728 Form in PDF format.

8. Click the Printer icon (Printer icon); enter any print parameters and click **OK**.

9. Obtain the required signatures from the attending physician and patient on the printed CMS-2728 Form.

This material was prepared by FMQAI, the CROWNWeb Outreach, Communication, and Training contractor, under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy.

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10 Come back to CROWNWeb to complete the CMS-2728 Form; repeat Steps 1-4.

11 Click the Initial Dialysis+ link in the Eligible 2728 Forms column. The View ESRD Medical Evidence (2728) - Saved screen displays.

12 Click Edit 2728; the Manage 2728 Forms screen displays.

13 In Sections E-F, enter the dates the attending physician and patient signed the form (and any other missing data), and click Submit.

14 The View ESRD Medical Evidence (2728) – Submitted screen displays with the message “View ESRD Medical Evidence (2728) – Submitted.”

15 Mail the original, signed CMS-2728 Form to the Social Security Administration.

Edit a Saved CMS-2728 Form

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.

3 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4 Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.

5 In the Existing 2728 Forms section column, click the Initial Dialysis+ link. The View ESRD Medical Evidence (2728) – Saved screen displays.

6 Click Edit 2728 in the gray sub-menu. The Edit an ESRD Medical Evidence (2728) – Saved screen displays.

7 Make any changes or additions to the data, scroll down and click Save or Submit. The View ESRD Medical Evidence (2728) – Saved (or Submitted) screen displays with the message “View ESRD Medical Evidence (2728) – Saved (or Submitted).”

Delete a Saved CMS-2728 Form

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria, and then click Search. The Patient Search Results screen displays.

3 Click the desired Dialysis link. The View ESRD Medical Evidence (2728) – Saved screen displays.

4 Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.

5 Click the Initial Dialysis+ link in the Existing 2728 Forms section column. The View ESRD Medical Evidence (2728) – Saved screen displays.

6 Scroll down and click Delete. A dialog screen displays, asking to confirm the deletion.

7 Click Yes. The View Patient Attributes screen displays with the message “Form 2728 was deleted.”

Print the CMS-2728 Form

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria, and then click Search. The Patient Search Results screen displays.

3 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4 Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.

5 In the Existing 2728 Forms section, click on the desired Dialysis link. The View ESRD Medical Evidence (2728) – Saved screen displays.

6 Click Edit 2728. The Edit ESRD Medical Evidence (2728) – Saved screen displays.

7 Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.
Click the Printer icon; enter any print parameters and click OK.

Add a Re-entitlement CMS-2728 Form
1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.
2. Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.
3. Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.
4. Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.
5. Click Add 2728 in the Eligible 2728 Forms section. The description reads “Re-entitlement Restart Dialysis.” If the form passes all required validations, the Add an ESRD Medical Evidence (2728) – Saved screen displays.
6. Enter all available information and click Save. The message “Form 2728 was saved” displays.
7. Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.
8. The View ESRD Medical Evidence (2728) – Submitted screen displays with the message “View ESRD Medical Evidence (2728) – Submitted.”

Add a Supplemental CMS-2728 Form
1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.
2. Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.
3. Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.
4. Click 2728 in the gray sub-menu. The Manage 2728 Forms screen.
5. Click Add 2728 in the Eligible 2728 Forms section. The description reads “Supplemental Training.” If the form passes all required validations, the Add an ESRD Medical Evidence (2728) screen displays.
6. Enter all available information and click Save. The message “Form 2728 was saved” displays.
7. Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.
8. Click the Printer icon; enter any print parameters and click OK.
9. Obtain the required signatures from the attending physician and patient on the printed CMS-2728 Form and add any other missing data.
10. Come back to the CROWNWeb system to complete the CMS-2728 Form; repeat Steps 1-4.
11 Click the **Supplemental Training** link in the **Existing 2728 Forms** section. The **View ESRD Medical Evidence (2728)** – **Saved** screen displays.

12 Click **Edit 2728** in the gray sub-menu. The **Manage 2728 Forms** screen displays.

13 In Sections E-F, enter the dates the attending physician and patient signed the original form, enter any missing data, and click **Submit**. The **Manage 2728 Forms** screen displays with the message, “**View ESRD Medical Evidence (2728)** – **Submitted**.”

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**Add Patient Clinical Information**

**NOTE:** If there is no clinical data for the patient for that reporting month, complete the minimum required fields (those with a red asterisk [*] or a check box, i.e., **Sodium Education** or **Vaccinations**).

1 From the CROWNWeb **Home Page**, click **Clinical**. The **Manage Patient Clinical Values** screen displays.

2 To search for one facility, enter the **Facility CCN** or **Facility NPI** and click **Go**; -**OR**-

Select the desired facility from the drop-down list in the **Facility DBA Name** field. The screen refreshes.

3 Select the **Collection Type** from the drop-down list. The screen refreshes.

4 Select the **Clinical Month** from the drop-down list. The screen refreshes.

5 (Optional) To refine your search even more, in the **Last Name Group** field, select from the drop-down list the patients with last names that begin with those letters.

6 In the **Display Patients** field, select from the drop-down list whether to display patients **With** or **Without Clinical** values. Leave the field **blank** to select both options.

7 Click **Go**. The **Manage Patient Clinical Values** screen refreshes displaying a list of patients in the **Patient** field who meet the search criteria.

8 Select the desired patient from the **Patient** field drop-down list. The screen refreshes, displaying details for the selected patient.

**NOTE:** If no clinical information has been entered, the following message displays “**No clinical data for selected facility, patient and clinical month.”**

9 (Optional) Enter or select the **Common Lab Test Date**.

10 In the **Clinical Values** section, enter the clinical data for the patient under each category.

11 Click **Submit**. If no red error messages display, your clinical data has been validated and submitted in CROWNWeb.

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**Add Patient Treatment Information**

1 From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2 Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays.

3 Click the patient’s **CROWN UPI**. The **View Patient Attributes** screen displays.

4 Click **Admit/Discharge Summary** in the gray sub-menu. The **View Admit/Discharge Summary** screen displays.

5 Click the **Treatment Summary** link. The **View Treatment Summary** screen displays.

6 Click **Add Treatment** in the gray sub-menu. The **Add Treatment Information** screen displays.

7 Enter data in the required fields for the patient’s new treatment information; then click **Submit**.

8 The **View Treatment Summary** screen displays with the new treatment record listed first under the **Treatment Summary for Admission** section.
Admit a New ESRD Patient

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Click Admit Patient in the sub-menu. The Admit a Patient screen displays.

3. Enter the patient’s information and select New ESRD Patient in the Admit Reason field. Click Next. The Admit a Patient – Add Treatment Information screen displays.

4. Enter or select the required treatment information, and click Next. The Add Patient Attributes screen displays.

5. Enter any missing patient attribute data in the Key Patient Info and Patient Contact Info sections.

NOTE: Add any information that will be required for the CMS-2728 or CMS-2746 Forms.

6. In the Misc Info section, the Current Status and Effective Date fields are blank. Go through each field under Current Status and use the drop-down menu to make a selection. That action populates the Effective Date to the current date. If you know the actual effective date for that selection, then change the date in the Effective Date field.

7. Click Submit. The message “View Patient Details – SUBMITTED” displays.

Near Match – In Scope Patient

From Step 3, the Possible Duplicate Patients screen displays.

4. Review the information that was recently entered vs. what is currently in CROWNWeb for the patient. For further review, click on the Patient Name link.

5. Go to the breadcrumb trail, and click Admit Patient. The Admit a Patient screen displays with fields auto-populated.

6. Correct any admission information, then click Next. The Admit a Patient – Add Treatment Information screen displays.

7. Enter the patient’s dialysis treatment information, then click Next. The Edit Patient Attributes screen displays with the message “This Patient was an exact match for the New Patient info you entered.”

Near Match – Out of Scope Patient

From Step 3, the Possible Duplicate Patients screen displays with the message “Possible duplicate patients outside of your scope have been identified. It is recommended that you contact your ESRD Network to investigate the possible duplicate(s) for the patient you admitting. You may not admit this patient without the assistance of your ESRD Network.”

4. Review the information that was recently entered vs. what is currently in CROWNWeb for the patient. For further review, click on the Patient Name link.

5a) If the data was not entered correctly, click on the Admit Patient link in the breadcrumb trail, and correct the information. Click Next again. The Admit a Patient – Add Treatment Information screen displays. Continue admitting the patient. When finished, the Patient Attributes screen displays the message “This patient was an exact match for the New Patient info you entered.”

5b) If the data was correctly entered and these are the same patients, click the check box in the Override column, then click the Admit link. A confirmation message “Are you sure you want to perform an override action to admit this patient.” displays. Click Yes.

The Admit a Patient – Add Treatment Information screen displays. Complete the required information. Click Next.

The Patient Attributes screen displays. Fill in any required fields. Click Submit. A new patient record is created in CROWNWeb.
Exact Match – In Scope Patient
From Step 3, the Admit Patient screen displays with the message, “Minimum required fields are missing or invalid. Please review errors listed and make the necessary changes in order to continue.
- Invalid Admit Reason: An exact match patient was found and the Admit Reason selected is invalid based on the previous admission record’s Admit Reason with the same Transient Status (New ESRD Patient).”

4 The patient cannot be admitted unless Transfer In is selected in the Admit Reason field.

Exact Match – Out of Scope Patient
From Step 3, the Patient Admission Confirmation screen displays.

4 Click Accept to admit the patient. The Admit a Patient – Add Treatment Information displays.

5 Add the patient’s dialysis treatment information, and click Next. The Edit Patient Attributes screen displays with the message “This Patient was an exact match for the New Patient info you entered.”

6 Review the auto-populated attributes, then click Submit. The View Patient Details – SUBMITTED screen displays.

Admit a Transfer (Existing) Patient
1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Click Admit Patient in the sub-menu. The Admit Patient screen displays.

3 Enter the patient’s information and select Transfer In in the Admit Reason field. Click Next.

Near Match – In Scope Patient
From Step 3, the Possible Duplicate Patients screen displays.

4 Review the information that was recently entered vs. what is currently in CROWNWeb for the patient. You can also click on the Patient Name link that is currently in CROWNWeb for further review.

5 Go to the breadcrumb trail, and click Admit Patient. The Admit a Patient screen displays with fields auto-populated.

6 Correct any admission information, then click Next. The Admit a Patient – Add Treatment Information screen displays.

7 Enter the patient’s dialysis treatment information, then click Next. The Edit Patient Attributes screen displays with the message “This Patient was an exact match for the New Patient info you entered.”

8 Review the patient attributes on the screen and click Submit. The View Patient Details – SUBMITTED screen displays.

Near Match – Out of Scope Patient
From Step 3, the Possible Duplicate Patients screen displays with the message, “Possible duplicate patients outside of your scope have been identified. It is recommended that you contact your ESRD Network to investigate the possible duplicate(s) for the patient you admitting. You may not admit this patient without the assistance of your ESRD Network.”

4 Review the information that was recently entered vs. what is currently in CROWNWeb for the patient. For further review, click on the Patient Name link.

5 a) If the data was not entered correctly, click on the Admit Patient link in the breadcrumb trail, and correct the information. Click Next again. The Admit a Patient – Add Treatment Information screen displays. Continuing admitting the patient. The Patient Attributes screen displays the message “This patient was an exact match for the New Patient info you entered.”
b) If the data was correctly entered and these are the same patients, click the check box in the Override column, then click the Admit link. A confirmation message “Are you sure you want to perform an override action to admit this patient.” displays. Click Yes.

The Admit a Patient – Add Treatment Information screen displays. Complete the required information. Click Next.

The Patient Attributes screen displays. Fill in any required fields. Click Submit. A new patient record is created in CROWNWeb.

**Exact Match – In Scope Patient**
From Step 3, the Edit Patient Attributes screen displays with the message, “Admission process cancelled, Patient is already admitted to current facility.”

4. Admit the patient to a different facility.

**Exact Match – Out of Scope Patient**
From Step 3, the Patient Admission Confirmation screen displays.

4. Click Accept. The Admit a Patient – Add Treatment Information displays.

5. Add the patient’s dialysis treatment information; click Next. The Edit Patient Attributes screen displays with the message “This Patient was an exact match for the New Patient info you entered.”

6. Review the auto-populated attributes, then click Submit. The View Patient Details – SUBMITTED screen displays.

**Admit a Transient Patient**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Click Admit Patient in the sub-menu. The Admit Patient screen displays.

3. In the Admit Reason field, select Transfer In and select Yes for the Transient Status; then click Next. The Transient Information section displays with additional fields.

4. In the Transient Reason field, select the reason from the drop-down list. Enter any other demographic information, if applicable.

5. Click Next. The Admit a Patient – Add Treatment Information screen displays.

6. Enter the patient’s dialysis treatment information; click Next. The Edit Patient Attributes screen displays with the message “This patient was an exact match for the New Patient info you entered.”

7. Scroll to the bottom of the screen, and click Submit. The View Patient Attributes screen displays with the message “View Patient Details – SUBMITTED.”

**Add an Initial CMS-2728 Form**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.

3. Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4. Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays the CMS-2728 Form that needs to be completed.

5. Click the Add 2728 button in the Eligible 2728 Forms section. The Add an ESRD Medical Evidence (2728) screen displays.

6. Enter the required information in Sections A-F (with the exception of the attending practitioner and patient signature dates), and then click Save. The message “Form 2728 was saved” displays.

7. Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.

8. Click the Printer icon ( ); enter any print parameters and click OK.
9 Obtain the required signatures from the attending physician and patient on the printed CMS-2728 Form.

10 Come back to the CROWNWeb system to complete the CMS-2728 Form; repeat Steps 1-4.

11 Click the Initial Dialysis link in the Eligible 2728 Forms column. The View Form 2728 screen displays.

12 Click Edit 2728; the Manage 2728 Forms screen displays.

13 In Sections E-F, enter the dates the attending physician and patient signed the form (and any other missing data), and then click Submit.

14 The View ESRD Medical Evidence (2728) – Submitted screen displays with the message “View ESRD Medical Evidence (2728) – Submitted.”

15 Mail the original signed (blue ink recommended) CMS-2728 Form to the Social Security Administration.

Print the Form

16 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

17 Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.

18 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

19 Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.

20 In the Existing 2728 Forms section, click on the desired Dialysis link. The Add ESRD Medical Evidence (2728) screen displays.

21 Click the Add 2728 button in the Eligible 2728 Forms section. The description reads “Re-entitlement Restart Dialysis.” If the form passes all required validations, the Add an ESRD Medical Evidence (2728) screen displays.

22 Enter all available information and click Save. The message “Form 2728 was saved” displays.

23 Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.

Add a Re-entitlement CMS-2728 Form

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.

3 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4 Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays the CMS-2728 Form that needs to be completed.

5 Click the Add 2728 button in the Eligible 2728 Forms section. The description reads “Re-entitlement Restart Dialysis.” If the form passes all required validations, the Add an ESRD Medical Evidence (2728) screen displays.

6 Enter all available information and click Save. The message “Form 2728 was saved” displays.

7 Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.

8 Click the Printer icon ( ); enter any print parameters and click OK.

9 Obtain the required signatures from the attending physician and patient on the printed CMS-2728 Form (and any other missing data).

10 Come back to the CROWNWeb system to complete the CMS-2728 Form; repeat Steps 1-4.
11 Click the Re-entitlement Restart Dialysis+ link in the Existing 2728 Forms section. The View ESRD Medical Evidence (2728) – Saved screen displays.

12 Click Edit 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.

13 In Sections E-F, enter the date the attending physician and patient signed the form (and any other missing data); click Submit.

14 The View ESRD Medical Evidence (2728) – Submitted screen displays with the message “View ESRD Medical Evidence (2728) – Submitted.”

Add a Supplemental CMS-2728 Form

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.

3 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4 Click 2728 in the gray sub-menu. The Manage 2728 Forms screen displays the CMS-2728 Form that needs to be completed.

5 Click Add 2728 in the Eligible 2728 Forms section. The description reads “Supplemental Training.” If the form passes all required validations, the Add an ESRD Medical Evidence (2728) screen displays.

6 Enter all available information and click Save. The message “Form 2728 was saved” displays.

7 Scroll to the bottom of the screen and click Print. CROWNWeb displays the CMS-2728 Form in PDF format.

8 Click the Printer icon ( Printer icon ? ); enter any print parameters and click OK.

9 Obtain the required signatures from the attending physician and patient on the printed CMS-2728 Form (and any other missing data).

10 Come back to the CROWNWeb system to complete the CMS-2728 Form; repeat Steps 1-4.

11 Click the Supplemental Training+ link in the Existing 2728 Forms section. The View ESRD Medical Evidence (2728) – Saved screen displays.

12 Click Edit 2728 in the gray sub-menu. The Manage 2728 Forms screen displays.

13 Enter any missing data, and then click Submit. The View an ESRD Medical Evidence (2728) – Submitted screen displays.

Complete a CMS-2746 Form

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria for the deceased patient, and then click Search. The Patient Search Results screen displays a list of patients matching your search criteria.

3 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4 Click Edit Patient in the gray sub-menu. The Edit Patient Attributes screen displays.

5 Scroll down to the Medical Info section. Enter the Date of Death and Death Code, and then click Submit. The View Patient Attributes screen displays the message “Patient Details – Submitted.”

6 Click Add 2746 (0) in the gray sub-menu. The Add a New Death Notice (2746) screen displays with information pre-populated from the current patient record.

7 Enter the required information, and then click Submit. The message “View a Death Notice (2746)” displays.

8 Click Print to open a new window displaying the CMS-2728 Form in PDF format.

9 Click the printer icon ( Printer icon ? ) to display the print menu. Select the desired printer and click OK.
**Edit a Saved CMS-2746 Form**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Enter your search criteria, and then click Search. The Patient Search Results screen displays.

3. Click the CROWN UPI of the desired patient. The View Patient Attributes screen displays.

4. Click the Edit 2746 (Saved) link in the gray sub-menu. The Edit a New Death Notice (2746) screen displays.

5. Apply the desired changes; click Save or Submit. The View Patient Attributes screen displays the message “Patient Details – Saved (or Submitted).”

**Delete a Saved CMS-2746 Form**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Enter your search criteria, and then click Search. The Patient Search Results screen displays.

3. Click the CROWN UPI of the desired patient. The View Patient Attributes screen displays.

4. Click View 2746 (Saved) or (Submitted) in the gray sub-menu. The View a Death Notice (2746) – Saved (or Submitted) screen displays.

**View a CMS-2746 Form**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Enter your search criteria, and then click Search. The Patient Search Results screen displays.

3. Click the CROWN UPI of the desired patient. The View Patient Attributes screen displays.

4. Click Yes. The View Patient Attributes screen displays. The gray sub-menu shows the Add 2746 (0) link, designating that this patient does not have a CMS-2746 associated anymore.

**Delete Patient Admit/Discharge Information**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Enter your search criteria, and then click Search. The Patient Search Results screen displays.

3. Click the CROWN UPI of the desired patient. The View Patient Attributes screen displays.


5. Click the desired Admit Date. The View Admit/Discharge Information screen displays.

6. Click Edit Admit/Discharge in the gray sub-menu. The Edit Admit/Discharge Information screen displays.

7. Scroll to the bottom of the screen and click Delete. A dialog box displays, asking to confirm the deletion.

8. Click Yes. The Admit/Discharge record is removed from the Admit/Discharge Summary screen and the message “Patient Admit Discharge Deleted” displays.

**Discharge a Patient**

1. From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2. Enter your search criteria and click Search. The Patient Search Results screen displays with a list of all patients who meet the search criteria.
3 Click the CROWN UPI for the desired patient. The View Patient Attributes screen displays.

4 Click Admit/Discharge Summary in the gray sub-menu. The Admit/Discharge Summary screen displays with a list of all the patient’s admit/discharges.

5 Click the Admit Date in the Admit Date column. The View Admit/Discharge Information screen displays.

6 Click Edit Admit/Discharge in the gray sub-menu. The Edit Admit/Discharge Information screen displays.

7 Complete the Patient Discharge Information section, and then click Submit.

8 The Admit/Discharge Summary screen displays the message “Patient Admit Discharge Submitted.”

Edit Patient Treatment Information

1 From the CROWNWeb Home Page, click Patients. The Search for Patients screen displays.

2 Enter your search criteria, and then click Search. The Patient Search Results screen displays the results based on the search criteria entered.

3 Click the patient’s CROWN UPI. The View Patient Attributes screen displays.

4 Click Admit/Discharge Summary in the gray sub-menu. The Admit/Discharge Summary screen displays.

5 Click the desired date in the Admit Date column. The View Admit/Discharge Information screen displays.

6 To edit the most recent Admission to your facility, click the desired date in the Admit Date column. The View Admit/Discharge Information screen displays.

7 Click Edit Treatment in the gray sub-menu. The Edit Treatment Information screen displays.

8 Make any edits to the Treatment information and click Submit. The View Treatment Summary screen displays with the edited treatment information.
Generate, Access, and Print a Report

1. From the CROWNWeb Home Page, click Reports. The Facility Reports screen displays.

2. Click on the desired report. The Criteria Selection screen displays.

3. Enter the desired criteria; click Finish. The Report Confirmation screen displays with the message “Your Report request has been successfully submitted. Return to the My Reports page to get an updated status on the report.”

4. Click on OK. The My Reports screen displays with any reports that have been generated in a table.

5. Click Report Type, Size link for the desired report. A File Download dialogue box opens.

6. Click Open to open the report, or click Save to save the report to your computer.

7. To print a report, when the report is open either:
   - Press Ctrl + P, enter any print parameters and click OK.
   - Click the Printer icon ( ), enter any print parameters and click OK.

   • Right-click on the report form and select Print from the menu that displays. Enter any print parameters and click OK.

Resolve a Notification

Access Notifications

1. From the CROWNWeb Home Page, click Action List. The View Action List screen displays.

2. In the Action Type field, select either REMIS Identity Notification or REMIS Event Notification from the drop-down list.

3. Select a facility from the Facility DBA Name drop-down list (unless you only have scope over one facility).

   (Optional) To select a specific facility, enter either the Facility CCN or the Facility NPI. Click Go.

4. Click Submit. The screen displays any Notifications listed in the Filter for Actions section.

5. Click on a Notification link in the Action Type column. The View Notification screen displays.

6. Review the information on the screen.

Accept An Identity Notification

7. For an Identity Notification, after Step 6 select Accept in the Action field pull-down menu. Click Submit.

8. A warning message “The following Patient’s Data will be updated. Check Override Warnings and click Submit to continue.” will display listing what will be updated in the patient’s data.

9. Click the check box to ignore the warning. Click Submit again.

10. The View Notification screen redisplay with the message “1 Notification(s) Accepted.”

Accept An Event Notification

7. After Step 6, click on the patient’s CROWN UPI link. The View Patient Attributes screen displays.

8. Follow the procedures to Edit a Patient’s Admit/Discharge Information.

9. To update the patient’s treatment record, follow the procedures to Edit Patient Treatment Information.

10. When the admit/discharge or treatment information has been updated, click on the View Notification breadcrumb link to return to the View Notification screen.
Reject a Notification

7 After Step 6, select Reject in the Action field pull-down menu. Click Submit.

8 A warning message displays with the message “No Action was selected for the following Notifications. Comments will not be saved.” Click the check box to ignore the warning.

9 The View Notification screen displays with the message “1 Notification(s) Rejected.”

Investigate a Notification

When you need time to research a notification before selecting an Action:

7 After Step 6, add any optional comments in the Comments field as to why you are investigating the Notification.

8 Click Investigate. The Action List screen refreshes with the message “Notification under Investigation.”

9 Research the notification to make a determination on whether to Accept, Reject, or Escalate.

10 Return to the Action List screen to resolve the Notification.

Resolve an Accretion

Access the Accretion

1 From the CROWNWeb Home Page, click Action List. The View Action List screen displays.

2 In the Action Type field, select REMIS Accretions from the drop-down list.

3 Select a facility from the Facility DBA Name field drop-down list (unless you only have scope over one facility).

(Optional) To select a specific facility, enter either the Facility CCN or the Facility NPI. Click Go.

4 Click Submit. The screen displays with all Accretions listed in a table.

5 Click an Accretion link in the Action Type column. The View Accretion screen displays.

6 Review the information on the screen.

Accept An Accretion

7 After Step 6, add any optional comments in the Comments field.

8 Click Accept. The Admit Patient screen displays with the warning message “Accretion under investigation.”

Escalate a Notification

If a notification has been escalated to the Network and you need help from CMS:

7 After Step 6, add any optional comments in the Comments field as to why you are escalating the Accretion.

8 Click Escalate. The Action List screen displays with the message “Notification escalated.”

9 The Notification is removed from your Action List.

Reassign a Notification

If a notification has been escalated to the Network and it needs to be reassigned to CMS, another Network, or facility:

7 After Step 6, add any optional comments in the Comments field as to why you are reassigning the Notification.

8 Click Reassign. The Action List screen displays with the message “Notification reassigned.”

9 The Notification is removed from your Action List.
9 Enter any missing information and click **Next**. The **Admit a Patient – Add Treatment Information** screen displays.

10 Enter or edit the appropriate treatment information. Click **Next**. The **Possible Duplicate Patients** screen displays.

11 Click **Submit**. The **Add Patient Attributes** screen displays. Enter any missing required information and click **Submit**.

12 The **View Patient Attributes** screen displays with the message “**View Patient Details – SUBMITTED.**”

**Reject An Accretion**

7 After **Step 6**, add any optional comments in the **Comments** field as to why you are rejecting the Accretion.

8 Click **Reject**. The **Action List** screen refreshes with the message “**Accretion rejected.**”

9 The Accretion is removed from your **Action List** screen and no updates are made.

**Investigate An Accretion**

When you need time to research an accretion before selecting an Action:

7 After **Step 6**, click **Investigate**. The **Action List** screen refreshes with the message “**Accretion under investigation.**”

8 Research the accretion to make a determination on whether to **Accept**, **Reject**, or **Escalate**.

9 Return to the **Action List** screen to resolve the Accretion.

**Escalate An Accretion**

If an Accretion has been escalated to the Network and you need help from CMS:

7 After **Step 6**, add any optional comments in the **Comments** field as to why you are escalating the Accretion.

8 Click **Escalate**. The **Action List** screen displays with the message “**Accretion escalated.**”

9 The Accretion is removed from your **Action List**.

**Reassign an Accretion**

If an Accretion has been escalated to the Network and it needs to be reassigned to CMS, another Network, or facility:

7 After **Step 6**, add any optional comments in the **Comments** field as to why you are reassigning the Accretion.

8 Click **Reassign**. The **Action List** screen displays with the message “**Accretion reassigned.**”

9 The Accretion is removed from your **Action List**.

**Search for Gap Patients**

1 From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2 Click **Gap Patients** in the sub-menu. The **Gap Patients** screen displays.

3 In the **Filter** field, use the drop-down menu to select a filter for your records.

4 Select whether to search the whole **Network** or a single **Facility** by clicking the corresponding radio button.

5 If searching for one facility, enter the **Facility CCN** or **Facility NPI**, then click **Go**. This auto-populates the **Facility DBA Name** field with one or more facilities.

6 Select the facility from the **Facility DBA Name** field drop-down list, and click **Search**. The **Gap Patients** screen redisplays with a list of all Gap patients meeting the search criteria.

**View a Facility**

1 From the CROWNWeb **Home Page**, click **Facilities**. The **Search Facilities** screen displays.

2 Enter your search criteria, and then click **Search**. The **Facility Search Results** screen displays a list of facilities matching your search criteria.
3 Click the **CROWN Fac ID** for the desired facility. The **Facility Details (Submitted)** screen displays the facility information.

**View an Existing Patient**

1 From the **CROWNWeb Home Page**, click **Patients**. The **Search for Patients** screen displays.

2 Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays a list of patients matching your search criteria.

3 To view attributes for a patient, click the patient’s **CROWN UPI**. The **View Patient Attributes** screen displays.

**Verify Patient Attribute and Related Treatment (PART) Data**

1 From the **CROWNWeb Home Page**, click **Patients**. The **Search for Patients** screen displays.

2 Click **PART**. The **PART Verification** screen displays.

3 Enter your search criteria, and then click **Go**. The **PART Verification** screen redisplay a list of all patients meeting the search criteria.

4 Verify the accuracy of a patient’s PART information by clicking the **Patient’s Name, Admit/Discharge**, and/or **Treatment** links.

5 Click the check box next to the patient’s name, and then click **Verify**.

6 The message “PART Verification – x Patient Records Verified” displays.

**Update Patient Attributes**

5 After **Step 4**, click the patient’s name in the **Patient Name** column. The **View Patient Attributes** screen displays.

6 Click the **Edit Patient** link in the gray sub-menu. The **Edit Patient Attributes** screen displays.

7 Make the necessary corrections, and click **Submit**. The **View Patient Attributes** screen displays with the message “View Patient Details – SUBMITTED.”

8 Click on **Part Verification** in the breadcrumb trail to return to the **PART Verification** screen.

9 Click the check box next to the patient’s name, and then click **Verify**.

10 The message “PART Verification – x Patient Records Verified” displays.

**Update Admit/Discharge Data**

5 After **Step 4**, click the date link in the **Admit/Discharge** column. The **View Admit/Discharge Information** screen displays.

6 Click **Edit Admit/Discharge** in the gray sub-menu. The **Edit Admit/Discharge Information** screen displays.

7 Make the necessary edits to the patient’s admit/discharge information, and click **Submit**. The **Admit/Discharge Summary** screen displays with the message “Patient Admit Discharge Submitted.”

8 Click the **Part Verification** link in the breadcrumb trail to return to the **PART Verification** screen.

9 Click the check box next to the patient’s name, and then click **Verify**.

10 The message “PART Verification – x Patient Records Verified” displays.

**Update Treatment/Physician Data**

5 After **Step 4**, click the treatment link in the **Treatment** column. The **View Treatment Information** screen displays.

6 Click **Edit Treatment** in the gray sub-menu. The **Edit Treatment Information** screen displays.
7. a) To add or change a physician, select a physician in the **Attending Practitioner** field. Click **Submit**.

b) To change the modality, select the correct modality in the **Primary Type of Treatment** field or make edits to any of the fields. Click **Submit**.

8. The **View Treatment Summary** screen displays with the edited treatment record under **Treatment Summary for Admission**.

9. Click the **Part Verification** link in the breadcrumb trail to return to the **PART Verification** screen.

10. Click the check box next to the patient’s name, and then click **Verify**.


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### View and Print a Report

1. From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2. Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays the results based on the search criteria entered.

3. Click the CROWN UPI for the desired patient. The **View Patient Attributes** screen displays the details for the selected patient.

### View a Patient’s Attributes

1. From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2. Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays a list of Admissions and Discharges for the selected patient.

3. Click the date in the **Admit Date** column for the desired admission. The **View Admit/Discharge Information** screen displays.

### View Facility Personnel

1. From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2. Enter your search criteria and click **Search**. The **Personnel Search Results** screen displays a list of personnel who meet the search criteria.

### View Patient Admit/Discharge Information

1. From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2. Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays.

3. Click the name of the desired person in the **Personnel Name** column. The **Personnel Details** screen displays with the staff member’s information.

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### View Facility Personnel

1. From the CROWNWeb **Home Page**, click **Personnel**. The **Search Personnel** screen displays.

2. Enter your search criteria and click **Search**. The **Personnel Search Results** screen displays a list of Admissions and Discharges for the selected patient.

3. Click the CROWN UPI for the desired patient. The **View Patient Attributes** screen displays.

4. Click **Admit/Discharge Summary** in the gray sub-menu. The **Admit/Discharge Summary** screen displays a list of Admissions and Discharges for the selected patient.

5. Click the date in the **Admit Date** column for the desired admission. The **View Admit/Discharge Information** screen displays.

### View Patient Treatment Detail Information

1. From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.
2 Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays the results based on the search criteria entered.

3 Click the **CROWN UPI** for the desired patient. The **View Patient Attributes** screen displays.

4 Click **Admit/Discharge Summary** in the gray sub-menu. The **Admit/Discharge Summary** screen displays.

5 Click the desired **Treatment Summary** link. The **View Treatment Summary** screen displays.

### View, Print, and Save Blank Patient Forms and Instructions

1 From the CROWNWeb **Home Page**, click **Reports**. The **Facility Reports** screen displays.

2 In the **Patient Forms** section, click the desired **Form** or **Instructions**. A new browser window opens displaying the form in a PDF format.

3 Click the **Printer icon** ( ); enter any print parameters and click **OK**.

4 To save the form, click the **Save icon** ( ) and save to your computer.

### View Patient Treatment Summary Information

1 From the CROWNWeb **Home Page**, click **Patients**. The **Search for Patients** screen displays.

2 Enter your search criteria, and then click **Search**. The **Patient Search Results** screen displays the results based on the search criteria entered.

3 Click the **CROWN UPI** for the desired patient. The **View Patient Attributes** screen displays.