Remember:

• All phone lines have been placed on mute.
• Ask questions directly to our Subject Matter Experts via the WEBEX Q&A panel.
• When we’re done, we will provide additional information on supplemental training materials.

• Dial In #: 1-866-906-7447 CODE: 8084929#
CROWNWeb OCT Trainers

CROWNWeb Outreach, Communication, and Training Team

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Project Director

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Senior Trainer
USING THE WebEx Q&A FEATURE

All lines are placed on mute to block out background noises. To speak, you can send a question to the panelists via the “Q&A” button.

Follow the directions below to use the “Q&A” button:

1. Mouse over to the **WebEx Navigation Panel** located at the top of your screen.

2. Click the **Q&A** icon. The Q&A box displays.

3. Click the **drop-down arrow** next to “Ask:” and select **All Panelist**. Type your question, and click the **Send** button. A Panelist will send you a response.
Our Agenda Today
We will cover these major areas within CROWNWeb:

**Day 1**

- Manage Users Workshop
  - Overview of CROWNWeb and QIMS
  - Managing Role and Scope
  - Add and Edit Facility Personnel

- Patient Life Cycle Workshop
  - Admit a New Patient
  - Patient Attributes
  - CMS-2728 Form

**Day 2**

- Patient Life Cycle Workshop
  - Treatment Information
  - Enter Clinical Information
  - Discharge a Patient
  - PART Data
  - CMS-2746 Form

- Facility Workshop
  - Notifications and Accretions

**Prerequisite Tutorials**
- Before You Begin
- Edit Facility Default Preferences
Each lesson is divided into two parts:

- **Part 1** – The background info
- **Part 2** – Let me show you how

**NOTE:**
Patient data used in this presentation is fictitious.
Objective:
Viewing and adding treatment information for a patient in CROWNWeb.
Things to know before you get started:

- When a patient is admitted to a facility, the *Treatment Summary* screen tracks changes in the modality.

- Each time the treatment information changes, a new *Treatment Summary* must be created.
1. From the *Home* screen, click the **Patients** link. The *Search Patients* screen displays.

2. Enter the patient information, then click **Search**. The *Patient Search Results* screen displays.

3. Click a patient's **CROWN UPI** link. The *View Patient Attributes* screen for that patient displays.
4. Click the **Admit/Discharge Summary** link in the gray sub-menu. The **Admit/Discharge Summary** screen displays.
5. Click a **Treatment Summary** link. The View Treatment Summary screen displays information on that treatment record.
6. Click the **Add Treatment** link. The *Add Treatment Information* screen displays.
7. Enter the patient's new dialysis treatment information, and then click Submit.
8. The *View Treatment Summary* screen displays the new treatment summary record.
Let’s take a look at how we’ll add Treatment information in CROWNWeb!
Treatment Summary Pop Quiz
Manage Clinical Information in CROWNWeb

Objective:
View patient clinical data in CROWNWeb
Things to know before you get started:

- Only **Facility Editors** can add clinical data.

- Facilities must submit clinical measures for every patient at least **once per month**. If the same lab is drawn a second time during the month, enter it.

- You can submit data **any time** during the month for any open clinical month.

- The last lab value entered for a month will be the one used to calculate the **Quality Measures (QM)**.
1. From the *Home* screen, click the **Clinical** link. The *Manage Patient Clinical Values* screen displays.
Specify Values to Find Patient

2. Specify the patient information:
   • (1) Facility Name (only needed if you have scope over more than one facility)
   • (2) Collection Type (Hemodialysis, Peritoneal Dialysis, or Vascular Access)
   • (3) Clinical Month (can only enter data for open months)
   • (4) Display Patients – Optional (With Submitted, With Saved or Without Clinical Values)
3. Once you’ve configured your search, click Go. The *Manage Patient Clinical Values* screen refreshes and displays a list of matching patients in the **Patient** field.
Select the Patient

4. In the **Patient** field drop-down list, select the desired patient. CROWNWeb displays the clinical screens for that patient for the selected reporting month.
5. Before entering any clinical data, you can also enter a **Common Lab Test Date**, if desired. The date in this field auto-populates the other clinical date fields once you tab past that date field. **Note:** *Dates can be manually changed if the lab was taken on a different date than the Common Lab Test Date.*
Entering Clinical Information

Objective:
Submit patient hemodialysis clinical data in CROWNWeb.
Streamlined Clinical Data Screens

• CMS released CROWNWeb 4.4 on Wednesday, May 28, 2014.

• CROWNWeb 4.4 features a number of updates that were based on user feedback.

• Most updates were to the *Clinical* screens of CROWNWeb.

• The *Clinical* screen in CROWNWeb has been streamlined, redesigned, and enhanced with new features.
Updated Clinical Screens

- CROWNWeb’s **Hemodialysis**, **Peritoneal Dialysis**, and **Vascular Access** screens were updated.

- Clinical data collection screens were updated to help reduce burden and improve data quality.

- **ALL** fields on the **Clinical** screens are required and validated by CROWNWeb.

- CROWNWeb includes new tools to help manage the submission or exclusion of required data.

![Anemia Management screen](image)
Carry Over Data Overview

- Many clinical fields, such as vaccination entries, carry over from month-to-month.
- Review these fields monthly and update as needed to ensure that the data continues to carry over.
- Most fields that carry over from month-to-month can be marked as “N/A”.
- Any field marked as “N/A” will NOT carry over to the next month. That field will appear blank the following month.
<table>
<thead>
<tr>
<th>Clinical Section</th>
<th>HD</th>
<th>PD</th>
<th>VA</th>
<th>Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adequacy</td>
<td>✗</td>
<td>✗</td>
<td></td>
<td>Height</td>
</tr>
<tr>
<td>Adequacy</td>
<td>✗</td>
<td>✗</td>
<td></td>
<td>Patient Height Unit of Measure</td>
</tr>
<tr>
<td>Vaccination</td>
<td>✗</td>
<td>✗</td>
<td></td>
<td>ALL FIELDS</td>
</tr>
<tr>
<td>Vascular Access</td>
<td></td>
<td></td>
<td>✗</td>
<td>AV Fistula State</td>
</tr>
<tr>
<td>Vascular Access</td>
<td></td>
<td></td>
<td>✗</td>
<td>AV Graft State</td>
</tr>
<tr>
<td>Vascular Access</td>
<td></td>
<td></td>
<td>✗</td>
<td>AV Fistula Creation Date</td>
</tr>
</tbody>
</table>
CROWNWeb features a SAVE button on each Clinical screen.

When entering data, users can stop clinical entry at any point, save it, then return to it later to finish.

Saved data can be updated at anytime, as long as the clinical month is still open.
Important Save Button Notes

- Data must be SUBMITTED in CROWNWeb to comply with CMS requirements.

- CROWNWeb does not validate SAVED data to ensure the accuracy and validity of data. Validation only happens when users click SUBMIT.

- Users must ensure that SAVED clinical records are SUBMITTED before clinical months are closed.

- Records that are SAVED (but not submitted) will NOT count towards a facility’s mandated monthly reporting – These missing data may impact compliance with CMS reporting requirements.
N/A Checkbox Overview

• CROWNWeb now features “N/A” checkboxes on the Clinical screens to allow users to indicate when values are NOT AVAILABLE.

• CROWNWeb provides users with two ways to indicate if lab values are N/A for a patient during a clinical month:
  1. A “Master N/A” checkbox that lets users indicate that “No Clinical Data Available For All Collection Types.”
2. N/A boxes for individual fields.
Let’s take a look at how we’ll enter clinical information in CROWNWeb!
Objective:
Learn how to discharge a patient in CROWNWeb.
Overview

When a patient informs you that they will be leaving your facility, you must discharge the patient in CROWNWeb* after their final treatment.

If a new facility admits this patient in CROWNWeb before the old facility discharges the patient, CROWNWeb will automatically perform a system discharge.
1. From the *Home screen*, click the **Patients** link. The *Search Patients* screen displays.

2. Enter the patient information, then click **Search**. The *Patient Search Results* screen displays.

3. Click a patient's **CROWN UPI** link. The *View Patient Attributes* screen for that patient displays.
4. Click the **Admit/Discharge Summary** link. The Admit/Discharge Summary screen displays.
5. Click the patient's **Admit Date**. The **View Admit/Discharge** screen displays.
6. Click **Edit Admit/Discharge**. The *Edit Admit/Discharge* screen displays.
7. Enter the required information in the Patient Discharge Information area, and then click Submit.
8. The **Admit/Discharge Summary** screen displays the message “*Patient Admit Discharge Submitted*.”
Facility Editors can delete Admit/Discharge records for patients in their scope when completed in error. Instead of Submit, click Delete.

Note: You cannot delete the only record for a patient; for example, you cannot delete the New to ESRD record for a patient.
Let’s take a look at how we’ll discharge a patient in CROWNWeb!
Objective:
Viewing and confirming PART information in CROWNWeb.
Background Information

What is PART?

**Patient Attributes and Related Treatment Information**

- Verify each patient at least once every 30 days.
- Can verify patients throughout the month.
- Does not need to be mailed to your Network – Electronic submission.
- Only **Facility Editors** can verify PART data.
1. From the *Home* screen, click the **Patients** link. The *Search for Patients screen* displays.

2. Click the **PART** link. The **PART Verification** screen displays.
3. Select the desired facility from the **Facility DBA Name** drop-down list, set the search **Filter** or enter the **Use Date Range**, and then click the **Search** button. PART data for patients who meet the search criteria for the selected facility displays.
4. In reviewing your patients’ information, if you notice that there are possible errors with the patient, admit/discharge or treatment data, you will need to click on the appropriate links to correct those errors.

If the Physician information is incorrect or missing, click on the Treatment link to correct the **Attending Practitioner** field on the *Edit Treatment Information* screen.
Verifying a Patient

5. After making any edits, you can go back to the PART Verification screen by clicking on the breadcrumb link.

[Image of PART Verification screen]

Search Patients > PART Verification > View Treatment(19400596) > Add/Edit Treatment Information(19400596)

Edit Treatment Information

Dialysis Treatment Information - 2104377779 - Jimbo Cricky

- Treatment Start Date: 10/01/2012
- Primary Dialysis Setting: Dialysis Facility/Center
- Expected Self-Care Setting: Incenter
- Primary Type of Treatment: Hemodialysis
- Sessions Per Week: 3.0
- Attending Practitioner: Baggins, Frodo
- Attending Practitioner UPIN: A65432
- Type Of Dialysis Training: 
- Dialysis Training Begin Date: mm/dd/yyyy
- Dialysis Time Period: 
- Time Per Session (in minutes): 240
- Attending Practitioner NPI: 
- Dialysis Training End Date: mm/dd/yyyy

[Buttons: Submit, Reset, Delete]
6. Click the checkbox for the patient(s) that you have verified, then click Verify.
7. The *PART Verification* screen displays the message “*PART Verification - xx Patient Records Verified.*”
Let’s Take a Look!

Let’s take a look at how we’ll verify PART information in CROWNWeb!

Link to CROWNWeb
Questions – Break 1
Completing a CMS-2746 Form in CROWNWeb

Objective:
Submit the CMS-2746 Death Notification form in CROWNWeb
Things to know before you get started:

• You must complete the CMS-2746 Death Notification form if the patient passes away within 30 days of discharge.

• Only Facility Editors can submit the form.

• In order to initiate the 2746 process, the facility must:

  ▪ Enter a **Reason for Death** and **Date of Death** on the patient’s attributes screen.
1. From the *Home screen*, click the **Patients** link. The *Search Patients* screen displays.

2. Enter the patient information, then click **Search**. The *Patient Search Results* screen displays.

3. Click a patient's **CROWN UPI** link. The *View Patient Attributes* screen for that patient displays.
4. Click the **Edit Patient** link. The *Edit Patient Attributes* screen displays.

![Screenshot of the QualityNet interface showing the Edit Patient link and patient attributes](image.png)
5. Scroll down to the bottom of the screen. In the Medical Info section, enter the **Date of Death** and **Primary Cause of Death** and then click the **Submit** button. The **View Patient Attributes** screen displays the message “**View Patient Details Submitted.**”
6. In the gray sub-menu, click the **Add 2746 (0)** link. The *Add a New Death Notice (2746)* screen displays with existing information pulled from the current patient record.
7. Enter the required data and then click **Save** or **Submit**.
7. Enter the required data and then click **Save** or **Submit**.

### Add a New Death Notice (2746)

**Key Patient Info - 2104370313**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) <strong>Patient’s Last Name</strong></td>
<td><strong>First Name</strong></td>
<td><strong>MI</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Timothy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) <strong>Medicare Claim Number</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>333557777A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) <strong>Patient’s Sex</strong></td>
<td><strong>Male</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4) <strong>Date of Birth</strong></td>
<td></td>
<td><strong>01/01/2000</strong></td>
<td></td>
</tr>
<tr>
<td>(5) <strong>Social Security Number</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>333557777</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6) <strong>Patient’s State of Residence</strong></td>
<td><strong>FL</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7) <strong>Place of Death</strong></td>
<td><strong>Hospital</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8) <strong>Date of Death</strong></td>
<td><strong>10/24/2011</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(10) <strong>Provider Name and Address (Street)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ABC Dialysis</td>
<td>12345 Main Street</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HARTFORD, CT 06102</td>
<td></td>
</tr>
<tr>
<td>(11a) <strong>Provider Number</strong></td>
<td><strong>110016</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(11b) <strong>Provider NPI</strong></td>
<td><strong>1770696643</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Causes of Death

(12) **Causes of Death (enter codes from list on back of form)** [Lookup Death Codes](#)

**a. Primary Cause**
- 23 -Myocardial infarction, acute

**b. Were there secondary causes?**
- **No**
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. 1</td>
<td>Enter the available data and then click <strong>Save</strong> or <strong>Submit</strong>.</td>
</tr>
<tr>
<td>No. 2</td>
<td>Causes of Death (enter codes from list on back of form) <a href="#">Lookup Death Codes</a></td>
</tr>
<tr>
<td>a. Primary Cause</td>
<td>Myocardial infarction, acute</td>
</tr>
<tr>
<td>b. Were there secondary causes?</td>
<td>No</td>
</tr>
<tr>
<td>c. If cause is Other (98), please specify:</td>
<td>Renal Replacement Therapy</td>
</tr>
<tr>
<td>No. 13</td>
<td>Renal replacement therapy discontinued prior to death:</td>
</tr>
<tr>
<td>No. 14</td>
<td>Was discontinuation of renal replacement therapy after patient/family request to stop dialysis?</td>
</tr>
<tr>
<td>Not Applicable</td>
<td></td>
</tr>
<tr>
<td>f. Date of last dialysis treatment</td>
<td>mm/dd/yyyy</td>
</tr>
</tbody>
</table>

*Required fields marked with an asterisk.*
Renal Replacement Therapy

(13) *Renal replacement therapy discontinued prior to death:
No

If yes, check one of the following:

f. Date of last dialysis treatment
   mm/dd/yyyy

(14) *Was discontinuation of renal replacement therapy after patient/family request to stop dialysis?
Not Applicable

Transplant and Hospice

(15) If deceased ever received a transplant:
   a. Date of most recent transplant
      mm/dd/yyyy
      Unknown
   
   b. Type of transplant received
   
   c. Was graft functioning (patient not on dialysis) at time of death?

   d. Did transplant patient resume chronic maintenance dialysis prior to death?

(16) *Was patient receiving Hospice care prior to death?

No

Physician

(17) *Name of Physician
Seuss, Doctor

Physician UPIN
A12345

Physician NPI

(18) *Date
   mm/dd/yyyy

Person Completing This Form
Queue, Susie
8. Once the form is submitted, you can print a completed CMS-2746 form for the patient’s records, if needed. Scroll to the bottom of the screen, and click the **Print** button. The *Report Viewer* displays the CMS-2746 form in PDF format.
9. Click the **printer icon**. The *Print* screen displays.
10. Select the desired printer from your **Print menu**, and click **OK**.
Let’s take a look at how we’ll complete a CMS-2746 in CROWNWeb!
CMS-2746 Pop Quiz
Notifications and Accretions

Objective:
Resolve discrepancies between CROWNWeb and REMIS.
Notifications and Accretions enable facilities to troubleshoot and correct discrepancies between CROWNWeb and the Renal Management Information System (REMIS) database directly from CROWNWeb.

**What Is REMIS?**

- CMS Database;
- Determines Medicare coverage periods for ESRD patients;
- Tracks the ESRD patient population for both Medicare and non-Medicare patients;
- Provides secure, role-based access to current ESRD patient and facility data.
How the Databases Work

REMIS gathers information from various CMS databases, and compares that data to CROWNWeb, the system of record for ESRD.

CROWNWeb receives discrepancy information each night, and assigns Notifications and Accretions to facilities based on that information.
What is a Notification?

Notification

A discrepancy in patient data between a CMS database and CROWNWeb (e.g., date of birth, last name, or a transplant that wasn’t recorded in CROWNWeb).

Facility Editors must review this data, and can then accept or reject the notification.

For notifications related to patient identifiers, when you accept a notification, CROWNWeb automatically updates the patient’s record in CROWNWeb with the new information.

For notifications related to treatment data, you must manually update the record in CROWNWeb.
You can take the following actions on Notifications:

**ACCEPT** – You agree with the patient data provided by the external source. Patient identifier data in CROWNWeb will be automatically updated, but treatment data must be manually changed.

**REJECT** – After research, you do not agree with the Notification. No changes are made in CROWNWeb.

**INVESTIGATE** – Informs other users that the Notification is “under investigation” by you.

**ESCALATE** – If the patient is not part of your facility or you require Network assistance in making a determination, this option reassigns the Notification to the Network.
What Is An Accretion?

Accretion

An ESRD patient identified in another CMS database that appears to be associated with your facility in the CMS database, but is not currently admitted to your facility in CROWNWeb.

Accepting an Accretion walks you through admitting the patient to your facility in CROWNWeb.
What Does Each Action Do?

You can take the following actions on Accretions:

**ACCEPT** – You agree with the external source and will admit the patient to your facility in CROWNWeb.

**REJECT** – You don’t agree with the Accretion. You’ve researched and the patient is **not** *ESRD*. No changes will be made in CROWNWeb.

**INVESTIGATE** – Informs other users that the Accretion is “under investigation” by you.

**ESCALATE** – The patient is not in your facility. This option escalates the Accretion to your Network so that they can reassign it to the correct facility.
How to Access Notifications & Accretions
# Working Notifications and Accretions

Follow the steps below to work specific Notifications or Accretions:

<table>
<thead>
<tr>
<th>Identity Notification</th>
<th>Event/Treatment Notification</th>
<th>Accretion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Review the data.</td>
<td>2. Review the data.</td>
<td>2. Review the data.</td>
</tr>
<tr>
<td>3. Decide which action to take.</td>
<td>3. Decide which action to take.</td>
<td>3. Decide which action to take.</td>
</tr>
<tr>
<td>4. If you <strong>Accept</strong> the Notification, CROWNWeb will automatically update the patient record.</td>
<td>4. Manually update the patient’s treatment record in CROWNWeb, if needed.</td>
<td>4. If you <strong>Accept</strong> the Accretion, CROWNWeb will take you to the <em>Admit Patient</em> screen, where you can finish admitting the patient.</td>
</tr>
<tr>
<td></td>
<td>5. Return to the Action List screen and <strong>Accept</strong> the Notification.</td>
<td></td>
</tr>
</tbody>
</table>
1. From the *Home* screen, click **Action List**. The *Action List* screen displays.
2. Select an **Action Type** or leave blank to show both Notifications and Accretions (select facility if necessary).
3. A list of the **Action Types** you selected displays in a table format.

**NOTE:** When no selection is made, both Notifications and Accretions display.
4. Click the **Notification** link. The *View Notification* screen displays.
5. Review the Notification data, then choose an action from the **Action** drop-down list. The *View Notification* screen refreshes.
6. Click **Submit**. If you selected **Accept**, a warning that the information is about to be updated displays.
7. Click the "To ignore warnings, Please select this checkbox and Submit" checkbox, and then click **Submit** again. The **View Patient Attributes** screen displays the updated information.
1. Click the **Accretion** link. The *View Accretion* screen displays.
2. Review the accretion, make any necessary comments in the *Comments* field, then select the appropriate Action: *Accept*, *Reject*, *Investigate*, or *Escalate*.
3. If you click **Accept**, the *Patient Information* screen displays and enables you to admit the patient to your facility. Verify and/or complete the information in the required fields, then click **Next** to finish admitting the patient.
4. After the patient has been admitted (or the accretion has been rejected or reassigned), the accretion is now closed and no longer displays on the Action List.
Questions – Break 2
Training materials, including Tutorials, Online Help, Curriculums, FAQs, and other training tools are available via:

http://www.projectcrownweb.org
Need Further Assistance?

For CROWNWeb/QIMS Application Questions:

QualityNet Help Desk
Phone: 1-866-288-8912
Email: qnetsupport-esrd@sdps.org
Hours: 7 a.m. to 7 p.m. CST, Monday-Friday

For “How to use CROWNWeb” Questions:

FAQs: www.projectcrownweb.org/pages/frequently_asked_questions
- or -
Help Me Form: http://help.projectcrownweb.org/
Survey

Please take our survey for the two sessions. The survey will pop up in your browser when the session ends.
Thank you for joining the CROWNWeb training.