Transplant Center Waitlist Dashboard
On Demand Training
Transcript

Speaker
Jane Chaine, MSN, RN, CNN, RD
Communications Director, EOCT

DISCLAIMER: This presentation document was current at the time of publication and/or upload onto the MyCROWNWeb.org website. Medicare policy changes frequently. Any links to Medicare online source documents are for reference use only. In the case that Medicare policy, requirements, or guidance related to these questions and answers change following the date of posting, these questions and answers will not necessarily reflect those changes; this information will remain as an archived copy with no updates performed.

Any references or links to statutes, regulations, and/or other policy materials included are provided as summary information. No material contained therein is intended to take the place of either written laws or regulations. In the event of any conflict between the information provided by the question-and-answer session and any information included in any Medicare rules and/or regulations, the rules and regulations shall govern. The specific statutes, regulations, and other interpretive materials should be reviewed independently for a full and accurate statement of their contents. This document has been edited for grammar.

Jane Chaine: Hello. Welcome to the Transplant Center Waitlist Dashboard training for transplant centers. My name is Jane Chaine, and I am the Communications Director for the End-Stage Renal Disease, or ESRD, Outreach Communication and Training Team, or EOCT. I will be your trainer for this on-demand training. In this brief tutorial, you will learn about how to use the Transplant Center Waitlist Dashboard in EQRS.

The Transplant Center Waitlist Dashboard is a helpful resource that reflects transplant-related information from both EQRS and United Network for Organ Sharing, or UNOS, data sources for patients who are waitlisted with one or more transplant centers. In the following slides, I provide an overview about the dashboard and how to use this feature in EQRS.

On August 10, 2023, the Centers for Medicare & Medicaid Services, or CMS, released a Transplant Center Waitlist Dashboard feature in EQRS for kidney transplant centers. The Transplant Center Waitlist Dashboard can be accessed under the Dashboard tab in EQRS. Before I show you how to navigate to dashboard, I would like to highlight some of its features. The dashboard provides helpful information by listing all patients that are on a waitlist with one or more transplant centers, dialysis facility contact information and setting, patient waitlist status, and more. As mentioned earlier, the transplant waitlist information listed in the dashboard comes from EQRS and UNOS data sources.

The Transplant Center Waitlist Dashboard is intended to improve the referral process and minimize gaps in the patient waitlist process. The dashboard can be used to help track a patient waitlist status, as well as help communicate with dialysis facilities by displaying the dialysis contact information within the dashboard user interface. This tool is particularly helpful for staff who are assisting patients through the transplant waitlist process. Now that you have a general overview of the dashboard, let's take a look at the dashboard features. In the next few slides will walk you through how to navigate to the Transplant Center Waitlist Dashboard in EQRS.

Once logged into EQRS, click on the Dashboard tab in the blue navigation menu at the top of the screen.

Once on the Dashboard screen, scroll to the bottom of the page and click on Transplant Center Waitlist.

The screen will refresh, and the Transplant Center Waitlist Dashboard will appear. The dashboard has a few nice features I would like to point out. As you can see, there is a lot of detailed information listed here. This information can be filtered using the filter by fields that are toward the top of the page. Also, notice that the dashboard contains several columns of information that EQRS users can view by easily scrolling left to right. Additional information about the column headers can be viewed when the user hovers their cursor of the column header. Lastly, there is a Download button that allows EQRS users to download and print dashboard information. We will take a look at these features in the following slides, but let's first take a look at the information contained within the dashboard itself.

Let's review the specific information that is listed in the dashboard. As you may have noticed on the previous slide, the dashboard has several columns, 11 to be exact. These columns are populated beginning with the patient's name, including the Patient's First [Name] and Last Name and EQRS ID number. Next is the patient's Date of Birth, followed by the patient's Date of Death, if applicable. The patient's date of death is captured from an electronic database or from the patient's demographic information in EQRS, if it has been entered in the Medical Information section of the Patient screen. The fourth column over is the Most Recent CMS-2728 Dialysis Start Date, which is the date Regular Chronic Dialysis Began according to the most recent Form CMS-2728. Next is the Waitlist Status, more specifically, this is the Patient Candidate status from the UNOS waitlist and includes three status types, including Active, Inactive, or Unknown. Followed by that is the Waitlisted Date column, which lists the date or dates the patient was waitlisted.

Continuing to the seventh column in the dashboard, it is the column for the patient's Admission Date or the date that the patient was admitted to the dialysis facility. Next is the Setting column. The Setting column displays the patient's dialysis treatment setting, which could be home, at a dialysis

facility, a long-term care facility, or skilled nursing facility.
Modality is the ninth column; this is the primary dialysis treatment type. The column where the Transplant Centers Patient is Multi-Listed At includes all centers where the patient is waitlisted according to the UNOS waitlist information. The last column on the right side of the dashboard is the Dialysis Facility column. This is where the patient is receiving their dialysis treatment. A nice feature about the Dialysis Facility column is that you can hover your cursor over the name of the name of the dialysis facility, and a pop-up box appears containing the facility's phone and fax numbers, the location of the facility, including the city and state, and lastly the dialysis facility CMS Certification Number, or CCN. This feature that displays contact information also applies to the Transplant Center's Patient is Multi-Listed At column.

Illustrated here is the feature discussed a moment ago, which displays contact information. The user can hover over the name of the dialysis facility in the dashboard to enable the system to display additional facility details. As displayed here, the facility details include the telephone and fax numbers, the city and state where the facility is located, and lastly the dialysis facility CCN. As mentioned earlier, this feature also applies to the Transplant Centers Patient is Multi-Listed At column. The system will display contact information for the transplant centers where the patient is listed, including the telephone and fax numbers, location, and center CCN.

Now that we have covered the information listed in the dashboard, let's review how to filter this information. Here you will see six Filter By fields that can be used to generate specific waitlist information. If needed, multiple filters can be applied at one time. The first Filter By field is the Patient filter, which allows you to filter the waitlist information by name or EQRS ID. Click on the Patient field to activate the drop-down list of patient names. Select the desired patient from the list of names that appear or, instead, search for a specific patient by typing their name or EQRS ID into the filter field. Once the desired patient is selected, the screen will refresh to display information for that patient. The same goes for the Dialysis Facility filter field.

Click on the Dialysis Facility filter field to activate a drop-down list of dialysis facilities where the patient is listed or search for a dialysis facility by typing a specific facility name into the field. Click on the desired facility. The system will refresh and display specific information for the dialysis facility selected.

EQRS users can filter by dialysis Setting. The filter options for Setting are All Settings, which is the default for this filter; Home; Dialysis Facility; Skilled Nursing Facility, or SNF; or Long-Term Care Facility. Select the dialysis setting filter you want. Moving on to the next filter option is the Waitlist Status. Under the Waitlist Status, EQRS users can select All Statuses, Active, Inactive, or Unknown. Select the status you want to filter. The system will refresh and display information based on the filter you selected. Again, you can apply multiple filters at once. Another filter is the Patient Multi-Listing Status filter. Here you can select the option to filter patients that are listed at multiple transplant centers by selecting Yes or No from the drop-down filter field. Selecting Yes will allow to you to view all transplant centers the patient is listed at under the Transplant Centers Patient is Multi-Listed At column. Lastly, the user can filter by a specific transplant center by clicking on the Transplant Center field to activate a drop-down list of transplant centers where the patient is listed or, instead, search for a transplant center by typing a specific transplant center name into the field. Click on the desired center. The system will refresh and display specific information for the transplant center selected. The blue Reset All can be clicked to clear all filter fields. After clicking on the Reset All link, the page will refresh and display all transplant dashboard information for your facility. As a reminder, after filtering the desired information, EQRS users can then download and print the filtered information by using the Download CSV button.

As mentioned earlier, EQRS users can view detailed dashboard information by scrolling left to right. The scroll bar is located below the dashboard information. Also, notice that the system can display as little as five records at a time or as many as 100 records at a time.

To view the next set of records, EQRS users must click on the page numbers listed at the bottom of the dashboard, or click Next which will advance the user to the next set of records.

Displayed here is the Download CSV button. Double click this button to download an Excel spreadsheet document that neatly contains the listed dashboard information. The spreadsheet can then be printed and used during a team meeting or for transplant monitoring and tracking purposes. This wraps it up for the EQRS Transplant Center Waitlist Dashboard training. Be sure to view the following slide that contains additional contact information to assist you with navigating EQRS.

This last slide provides additional contact information and resource links. Visit our website at www.MyCROWNWeb.org, where you can view and download EQRS transplant center resources from the Education page. New EQRS resources for transplant centers will be periodically added to MyCROWNWeb.org. While you are visiting the MyCROWNWeb.org website, remember to sign up for the EQRS Transplant Center mailing list to receive EQRS notifications and information specifically for transplant centers. Sign up by going to www.MyCROWNWeb.org and complete the required fields on the left side of the screen under Sign Up for the EQRS Transplant Center Mailing List. For assistance with EQRS technical-related issues, contact the Center for Clinical Standards and Quality, or CCSQ, Service Center. The CCSQ Service Center is open Monday through Friday 8 a.m. to 8 p.m. Eastern Time to provide assistance. For general EQRS questions, please use the QualityNet Q&A Tool. A link to the QualityNet Q&A Tool is provided on this slide. Lastly the ESRD Network Directory can be used to find your ESRD Network contact information, should you need help from your ESRD Network.

On behalf of CMS and our EOCT team, thank you for viewing the on-demand Transplant [Center] Waitlist Dashboard On Demand Training for transplant centers. Please visit MyCROWNWeb.org often to view EQRS resources and helpful tutorials.