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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.
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** ( ); 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. Go 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.
3. Click the patient's **CROWN UPI**. The *View Patient Attributes* 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. 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)."**

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 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, 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.
8. 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 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 add any other missing data.
10. Go back to CROWNWeb 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 dates the attending physician and patient signed the form, add any other missing data, then 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.
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 to the form.
10. Go back to CROWNWeb 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, add any other missing data, then click **Submit**. The *View an ESRD Medical Evidence (2728) – Submitted* screen displays with the message, **"View ESRD Medical Evidence (2728) – Submitted."**

Add Facility Personnel

1. From the CROWNWeb *Home Page*, click **Personnel**. The *Search Personnel* screen displays.
2. Click **Add Personnel** from the sub-menu. The *Personnel Search Results* screen displays a list of current staff members in CROWNWeb.
3. Review the list of personnel already associated with the facility to ensure the staff member was not already added.
4. If not, click **Add New**. The *Add New Personnel* screen displays.

5 Enter the required information, scroll down and click **Submit**. The *Personnel Details* screen displays the message **"Personnel Submitted."**

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.

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 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.

6 If the data was correctly entered and CROWNWeb is wrong, admit the patient using the incorrect data provided by CROWNWeb. Then immediately correct the patient's attributes after the patient has been admitted.

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 Contact your ESRD Network for further assistance.

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, t**he *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 Contact your ESRD Network for further assistance.

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.**"

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**; then click **Submit**. The *View Patient Attributes* screen displays with 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 all required information on the screen, and click either **Save** or **Submit**. The *View a Death Notice – Saved (or Submitted)* screen displays with the message **"View a Death Notice (2746) – Saved"** (or **SUBMITTED**).

8 To print the CMS-2746, scroll down the screen and click **Print**. The CMS-2746 displays in PDF format.

9 Click the **printer icon** (); enter any print parameters and click **OK**.

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

5 Scroll down and click **Delete**. A confirmation webpage dialog screen displays.

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

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**).

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 **View 2746 (Saved)** or **(Submitted**) in the gray sub-menu. The *View a Death Notice (2746) – Saved* (or *Submitted*) screen 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 Existing Patient 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 patients matching your search criteria.

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

4 Click **Edit Patient**. The *Edit Patient Attributes* screen displays.

5 Make the desired changes; scroll down and click **Submit**. The *View Patient Attributes* screen displays the message **"View patient Details – SUBMITTED."**

Edit Facility Default Preferences

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

2 Enter your search criteria, and then click **Search**. The *Search Results* screen displays a list of all facilities meeting the search criteria.

3 Click the **CROWN Fac ID** of the desired facility. The *Facility Details (Submitted)* screen displays.

4 Click **View Default Preferences** in the gray sub-menu. The *View Default Preferences* screen displays.

5 Click **Edit Default Preferences** in the gray sub-menu. The *Edit Default Preferences* screen displays.

6 Make the desired changes, and then click **Submit**. The *View Default Preferences* screen displays the message **"Preferences have been saved."**

Edit Facility Information

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.

4 Click **Edit Facility** in the gray sub-menu. The *Edit Facility Details (Submitted)* screen displays.

5 Make the desired changes, and then click **Submit**. The *Facility Details (Submitted)* screen displays the facility's edited information.

Edit Facility Personnel Information

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

1 Enter your search criteria, and then click **Search**. The *Personnel Search Results* screen displays a list of personnel based on the criteria entered.

2 Click the name of the desired person in the Personnel Name column. The *Personnel Details* screen displays.

3 Click **Edit Personnel** in the gray sub-menu. The *Edit Personnel* screen displays.

4 Edit the current data as applicable; -OR- to add another position, click on the **Add Another Position** button. The screen redisplays with an added Position *#X* section.

5 Add the required information for the added position. Scroll down and click **Submit**. The *Personnel Details* screen redisplays with the message **"Personnel Submitted."**

Edit Patient Admit/Discharge Information

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

1 Enter your search criteria designed to find the desired patient, and then click **Search**. The *Patient Search Results* screen displays.

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

3 Click **Admit/Discharge Summary** in the gray sub-menu. The *Admit/Discharge Summary* screen displays with a list of the patient's admissions/discharges.

4 Click the patient's **Admit Date**. The *View Admit/Discharge Information* screen displays.

5 To add discharge information for the patient, click **Edit Admit/Discharge** in the gray sub-menu. The *Edit Admit/Discharge Information* screen displays.

6 Enter the discharge information in the Patient Discharge Information section; click **Submit**. The *Admit/Discharge Summary* screen displays.

7 The **Discharge Date** and **Reason** columns populate with the added information, and the message **"Patient Admit Discharge Submitted"** displays.

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 Treatment Summary link. The *View Treatment Summary* screen displays.

6 Click the appropriate date link in the Treatment Start Date column. The *View Treatment 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 the **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. **NOTE:** *Please do not save any patient PII/PHI 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**.

Inactivate Facility Personnel

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

2 Enter the desired search criteria, and then click **Search**. The *Personnel Search Results* screen displays.

3 Click the desired staff member's name in the **Personnel Name** column. The *View Personnel Details* screen displays.

4 Click **Edit Personnel** in the gray sub-menu. The *Edit a Submitted Personnel Record* screen displays with the individual's current information and positions.

5 Click the **Inactive Record** check box, and then click **Submit**.

6 The *Personnel Details* screen displays the message **"Personnel Submitted,"** and the **Inactive Record** check box remains checked.

NOTE: *Do not inactivate physicians. They may be attached to another facility and this would also inactivate them from those facilities.*

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 **s**elect *Accept* in the **Action** field drop-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 redisplays 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 for **Edit Patient Admit/Discharge Information.**

9 To update the patient's treatment record, follow the procedures for **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 drop-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.

Escalate a Notification

If you cannot resolve the Notification and need help from your Network:

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.

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."**

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 determine whether to *Accept*, *Reject*, or *Escalate*.

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

Escalate An Accretion

If you cannot resolve the Accretion and need help from your Network:

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.

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's information.

View an Existing 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 patients matching your search criteria.

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

View a Notification

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 *Event Notification* from the drop-down list.

3 Enter either the **Facility CCN** or the **Facility NPI**. Click **Go**.

4 The **Facility DBA Name** field populates with facilities in your scope. Select a facility from the drop-down list.

5 Click **Submit**. The screen displays any available Notifications in a table format.

6 Click on any Notification link to view it.

View an 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 Enter either the **Facility CCN** or the **Facility NPI**. Click **Go**.

4 The **Facility DBA Name** field populates with facilities in your scope. Select a facility from the drop-down list.

5 Click **Submit**. The screen displays any available Accretions in a table format.

6 Click on any Accretion link to view it.

Verify Patient Attributes 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 redisplays 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 on 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 on 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**.

11 The message **"PART Verification – *x* Patient Records Verified"** displays.

View Patient Admit/Discharge Information

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

2 Enter your search criteria designed to find the desired patient, 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 **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.

6 Click the date link in the Treatment Start Date column. The *View Treatment Information* screen displays with details of the patient's treatment.

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.

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