



EQRS New User Training

*With ESRD Outreach,
Communication, and Training (EOCT)*

**End Stage Renal Disease
Quality Reporting System**

Today's Trainer

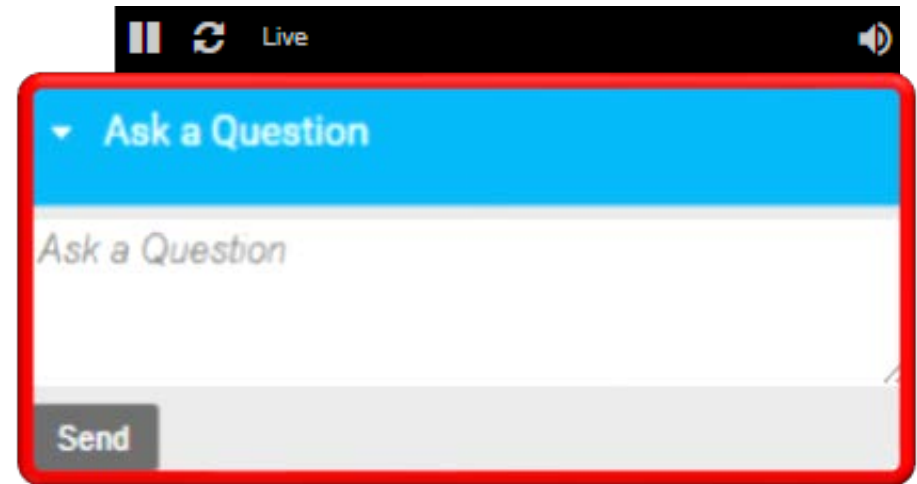
ESRD Outreach, Communication, and Training Team



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Communications Director

Submitting Questions

Type questions in the “Ask a Question” section, located on the left-hand side of your screen.



Note: Some questions may require additional research.
Unanswered questions may be submitted to [QualityNet Question and Answer Tool](#).

Our Agenda Today

- **Manage Access**
- **Facility Dashboard Overview**
- **Set Default Preferences**
- **Add Facility Personnel**
- **Admit a Patient**
- **View and Edit Patient Details**
- **Submit an Initial CMS-2728 Form**
- **Add Treatment Information**
- **Add Vaccination Information**
- **Enter Clinical Information**
- **Enter Clinical Depression Data**
- **Discharge a Patient**
- **Complete a CMS-2746 Form**
- **Resolve Accretions**
- **Resources and Evaluation**



How We'll Do Things Today

Each lesson is divided into two parts:

- Part 1 – Background information
- Part 2 – Demonstration

Note:

Data used in this presentation is fictitious.
Content subject to change.



Manage Access

Maintain HARP User Account

Use the Healthcare Quality Information System (HCQIS) Access Roles and Profile (HARP) to maintain your user account.

- One HARP account is needed to access multiple CMS applications.
- All EQRS users must have a HARP account.
- Maintain HARP account via <https://harp.cms.gov/user-profile/home>.
- Access HARP training materials via <https://mycrownweb.org/harp-training/>.

HARP Menu Options

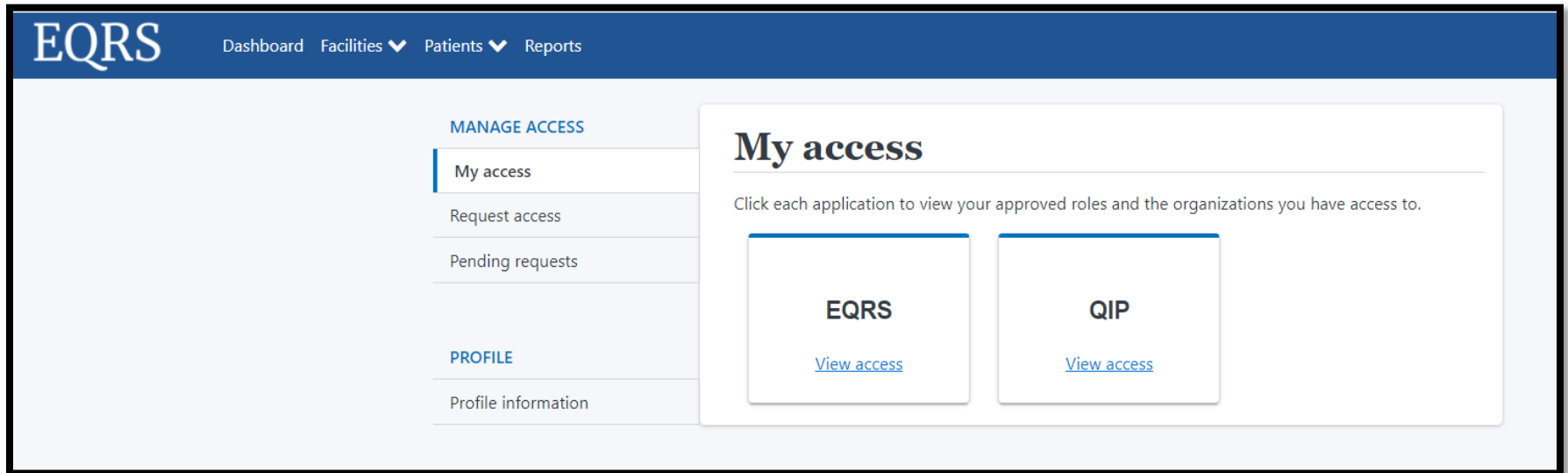
Use the HARP menu options to update your account.

The screenshot displays the 'User Profile' page. On the left, a sidebar menu is highlighted with a red box, containing the following options: 'Profile Information' (with a person icon), 'Change Password' (with a gear icon), 'Challenge Question' (with a lock icon), and 'Two-Factor Devices' (with a mobile phone icon). A hand cursor is pointing at the 'Two-Factor Devices' option. Below the menu is a 'Need Help?' section with the text 'Contact your application's help desk for assistance.' and a link 'Contact Help Desk →'. The main content area is titled 'Profile Information' and features an 'Edit' button in the top right corner. The profile information is organized into two columns:

Profile Information	
First Name	Last Name
Middle Name	Date of Birth
Email Address	Phone Number
Home Address Line 1	Home Address Line 2
City	State
ZIP Code	ZIP Code Extension
Country	

Maintain EQRS Role(s)

- EQRS blends functionalities of the following legacy ESRD Systems into one global application:
 - CROWNWeb
 - ESRD QIP
 - Renal Management Information System (REMIS)
- Use EQRS to maintain and request roles for necessary user interfaces.
Direct link: <https://eqrs.cms.gov/globalapp>



The screenshot displays the EQRS web application interface. At the top, the 'EQRS' logo is on the left, and navigation links for 'Dashboard', 'Facilities', 'Patients', and 'Reports' are on the right. A left-hand sidebar menu is visible, with 'MANAGE ACCESS' selected. This menu includes 'My access' (highlighted), 'Request access', 'Pending requests', and 'PROFILE' (with 'Profile information' below it). The main content area is titled 'My access' and features the instruction: 'Click each application to view your approved roles and the organizations you have access to.' Below this instruction are two cards: one for 'EQRS' and one for 'QIP', each containing a 'View access' link.

Note: Access step-by-step HARP account registration and EQRS role request instructions via <https://mycrownweb.org/harp-training/>.



Facility Dashboard Overview

Facility Dashboard

The EQRS Facility Dashboard provides reminders and announcements.

The screenshot displays the EQRS Facility Dashboard for facility 123456 ABC Dialysis. The top navigation bar includes the EQRS logo and tabs for Dashboard, Facilities, Patients, and Reports. The left sidebar contains sections for Overview, Form 2728, Form 2746, Accretions, and System Discharges. The main content area features a warning banner about adding a backup facility and a list of upcoming reminders.

New	Due	Past due
0	0	0

Due	Past due
0	0

Unresolved
0

2022	2021
0	1

Add a backup facility to your facility
Please add a backup for your facility by navigating to the Backup facility section.

Facility Dashboard Overview

Upcoming Reminders

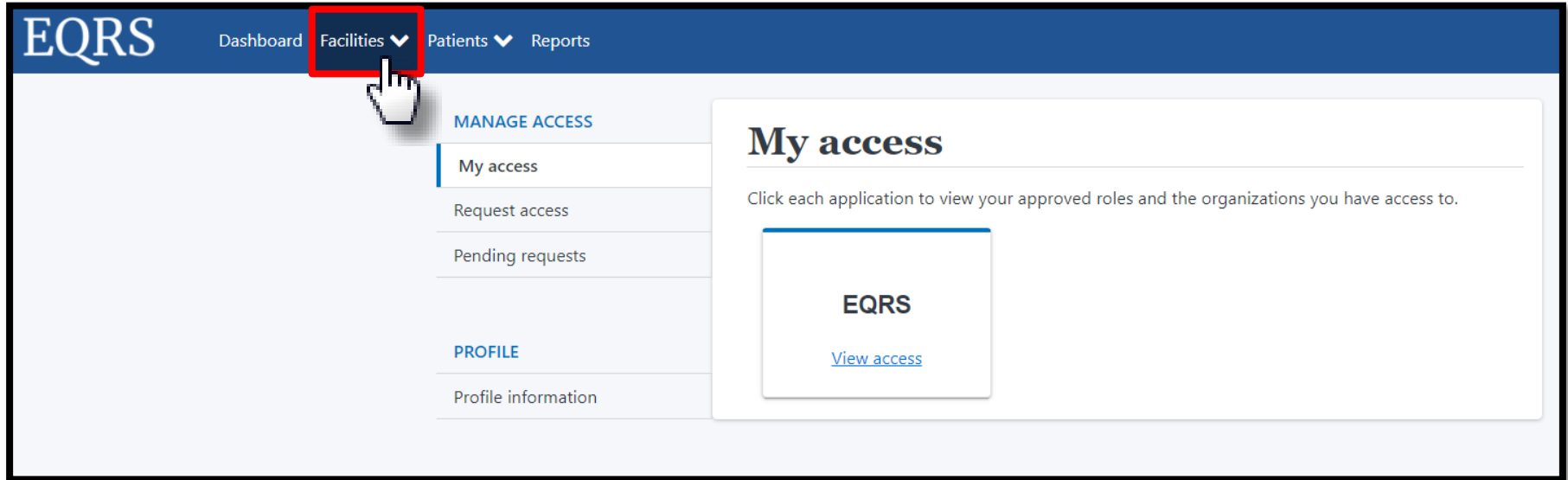
- 06/29/2022 5:00 pm PDT - Clinical Data submission deadline for the April 2022 clinical period.
- 07/31/2022 5:00 pm PDT - Clinical Data submission deadline for the May 2022 clinical period.
- 08/30/2022 5:00 pm PDT - Clinical Data submission deadline for the June 2022 clinical period.
- 02/27/2023 4:00 pm PDT - Clinical Depression Screening reporting period closes for the January 1 - December 31, 2022 assessment period.



Set Default Preferences

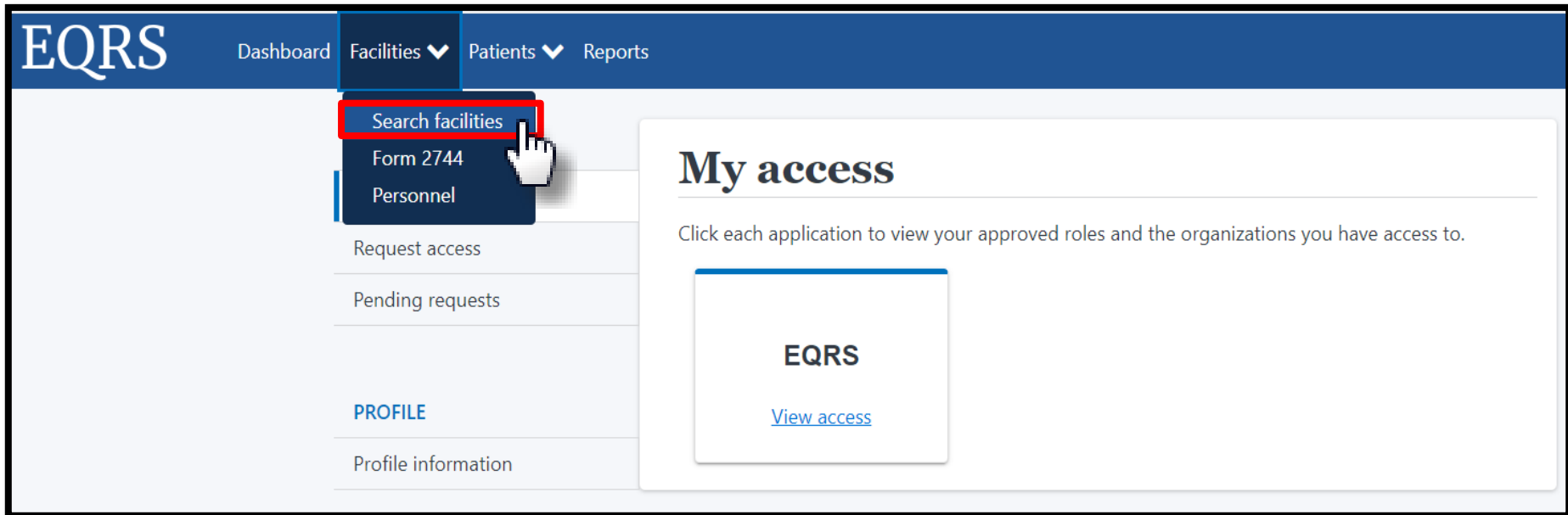
Click Facilities

Click **Facilities** in the navigation menu.



Click Search Facilities

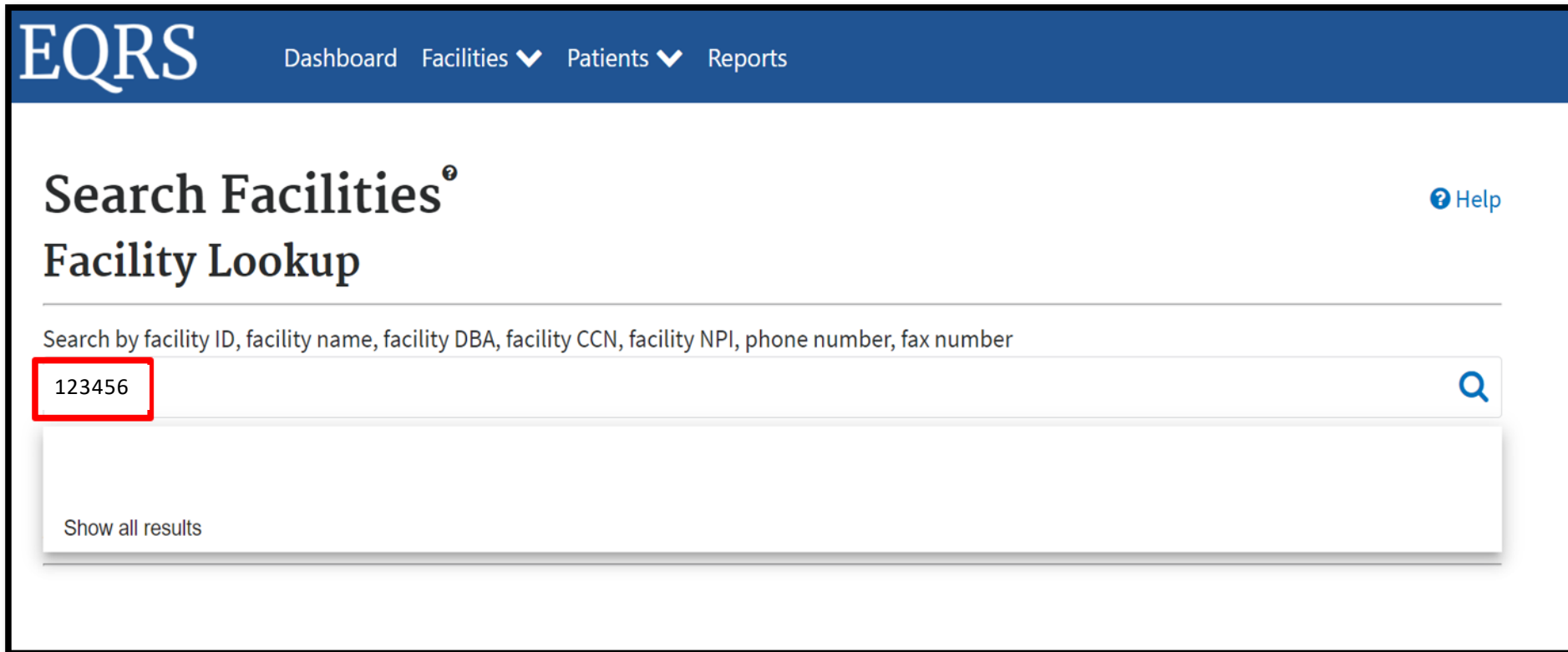
Click **Search Facilities** in the navigation menu.



The screenshot shows the EQRS application interface. The top navigation bar is dark blue with the EQRS logo on the left and menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow), and Reports. The 'Facilities' dropdown menu is open, showing a list of options: Search facilities (highlighted with a red box and a mouse cursor), Form 2744, Personnel, Request access, Pending requests, PROFILE, and Profile information. The main content area on the right is titled 'My access' and contains the text 'Click each application to view your approved roles and the organizations you have access to.' Below this text is a white box with the EQRS logo and a blue link labeled 'View access'.

Search for Facility

Enter the facility identifier.



The screenshot shows the EQRS (Enterprise Quality Reporting System) interface. At the top, there is a navigation bar with the EQRS logo and menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow), and Reports. Below the navigation bar, the main heading is "Search Facilities" with a registered trademark symbol, and a sub-heading "Facility Lookup". To the right of the heading is a "Help" link with a question mark icon. Below the heading is a search instruction: "Search by facility ID, facility name, facility DBA, facility CCN, facility NPI, phone number, fax number". A search input field contains the number "123456", which is highlighted with a red rectangular box. To the right of the input field is a magnifying glass search icon. Below the search field is a button labeled "Show all results".

Click Default Preferences

Click the **Default Preferences** link in the Actions section.

The screenshot displays the EQRS interface for a facility named 'ABC DIALYSIS'. The top navigation bar includes 'Dashboard', 'Facilities', 'Patients', and 'Reports', along with a 'Change organization' button. The left sidebar lists various sections: Network Information, Contact Information, Certification, Services Information, Ownership, Hours and shifts, and Backup facility. The main content area is titled 'Facility summary' and features a progress indicator showing 6/7 sections completed. A message indicates that there are errors in the form, specifically in the 'Backup facility' section. The 'Actions' section contains links for 'Attestations', 'Default preferences', and 'Personnel'. The 'Default preferences' link is highlighted with a red box and a hand cursor. Below this, the 'Network information' section is visible, showing details for 'Network 10' and 'Network facility code: XG'. Other fields for 'Program type' and 'Facility legal name' are also present.

EQRS Dashboard Facilities ▾ Patients ▾ Reports Change organization ▾

ABC DIALYSIS

- ✓ Network Information
- ✓ Contact Information
- ✓ Certification
- ✓ Services Information
- ✓ Ownership
- ✓ Hours and shifts
- Backup facility

Facility summary

Print page Help

6/7

You have errors in sections of the form. Please update and resolve the following:

- Backup facility

Actions

Attestations ↗ **Default preferences** ↗ Personnel ↗

Network information

View to edit

Network: Network 10 **Network facility code:** XG

Program type: Dialysis

Facility legal name: **Facility DBA name:**

Select Preferences

Select default values and click **Submit**.

Select Default values for this facility in the section below

Expand All

Adequacy Defaults

BSA Method (PD)
Dubois and Dubois

Kt/V Method (HD)
UKM (Urea Kinetic Modeling)

V Method (PD)
% Body Weight

Patient Height Unit of Measure
in

Patient Weight Unit of Measure
lbs

RRF Assessed in Calculating Kt/V (PD)
Yes

Mineral Metabolism Defaults

Lab Method for Serum Albumin
BCG

GFR Calculation Defaults


Adult Calculation Method
MDRD IDMS standardized

Pediatric Calculation Method
Schwartz Equation

Submit Reset

Successful Submission

EQRS displays a “**Facility default Preferences submitted successfully**” message.



Successful

Facility default Preferences submitted successfully.

Adequacy Defaults ^

BSA Method (PD): Dubois and Dubois	Patient Height Unit of Measure: cm
Kt/V Method (HD): UKM (Urea Kinetic Modeling)	Patient Weight Unit of Measure: kg
V Method (PD): % Body Weight	RRF Assessed in Calculating Kt/V (PD): Yes

Mineral Metabolism Defaults ∨

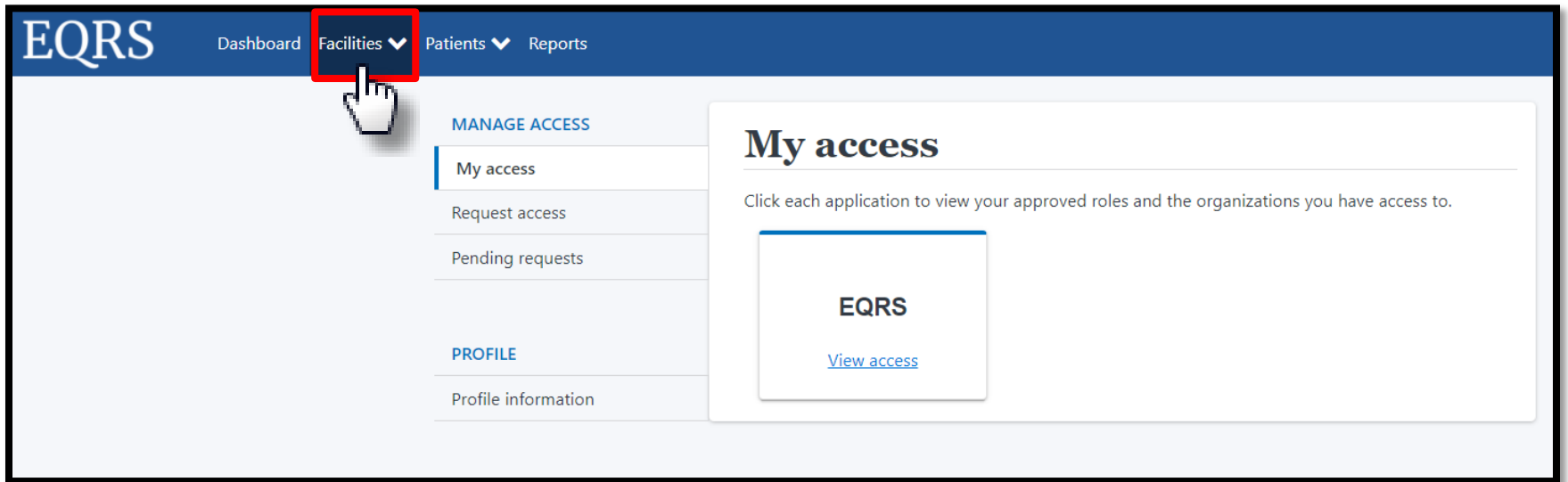
GFR Calculation Defaults ∨



Add Facility Personnel

Click Facilities

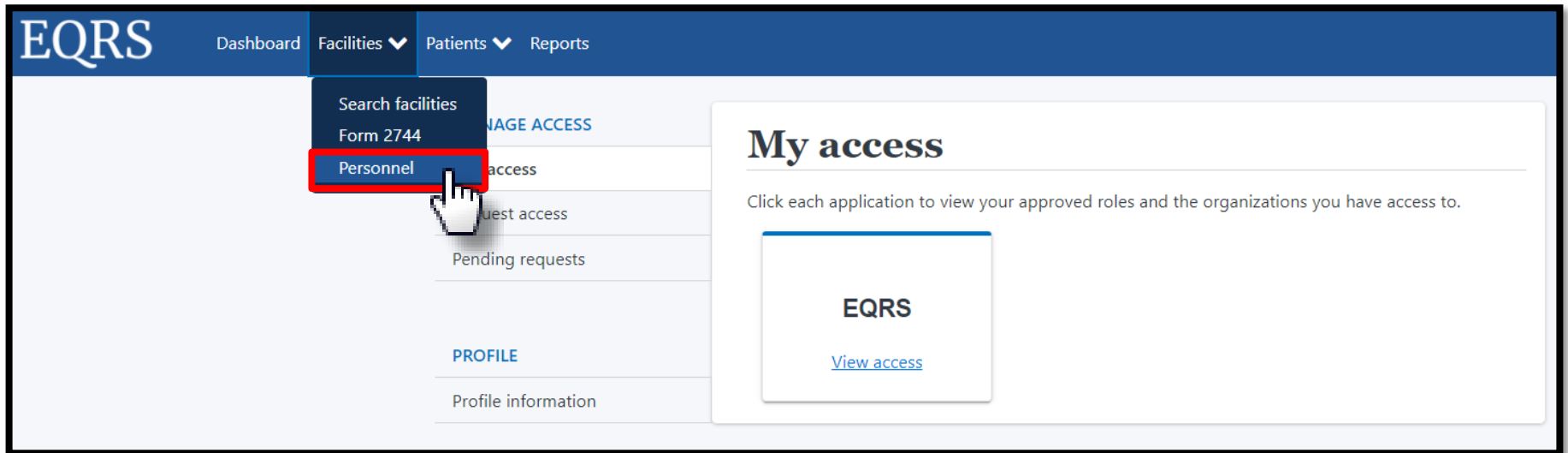
Click **Facilities** in the navigation menu.



The screenshot shows the EQRS web application interface. The top navigation bar is dark blue with the EQRS logo on the left and menu items: Dashboard, Facilities (highlighted with a red box and a mouse cursor), Patients, and Reports. Below the navigation bar, the main content area is light gray. On the left, there is a sidebar menu with two sections: 'MANAGE ACCESS' containing 'My access', 'Request access', and 'Pending requests'; and 'PROFILE' containing 'Profile information'. On the right, there is a white box titled 'My access' with the text 'Click each application to view your approved roles and the organizations you have access to.' Below this text is a card for 'EQRS' with a blue link 'View access'.

Click Search Facilities

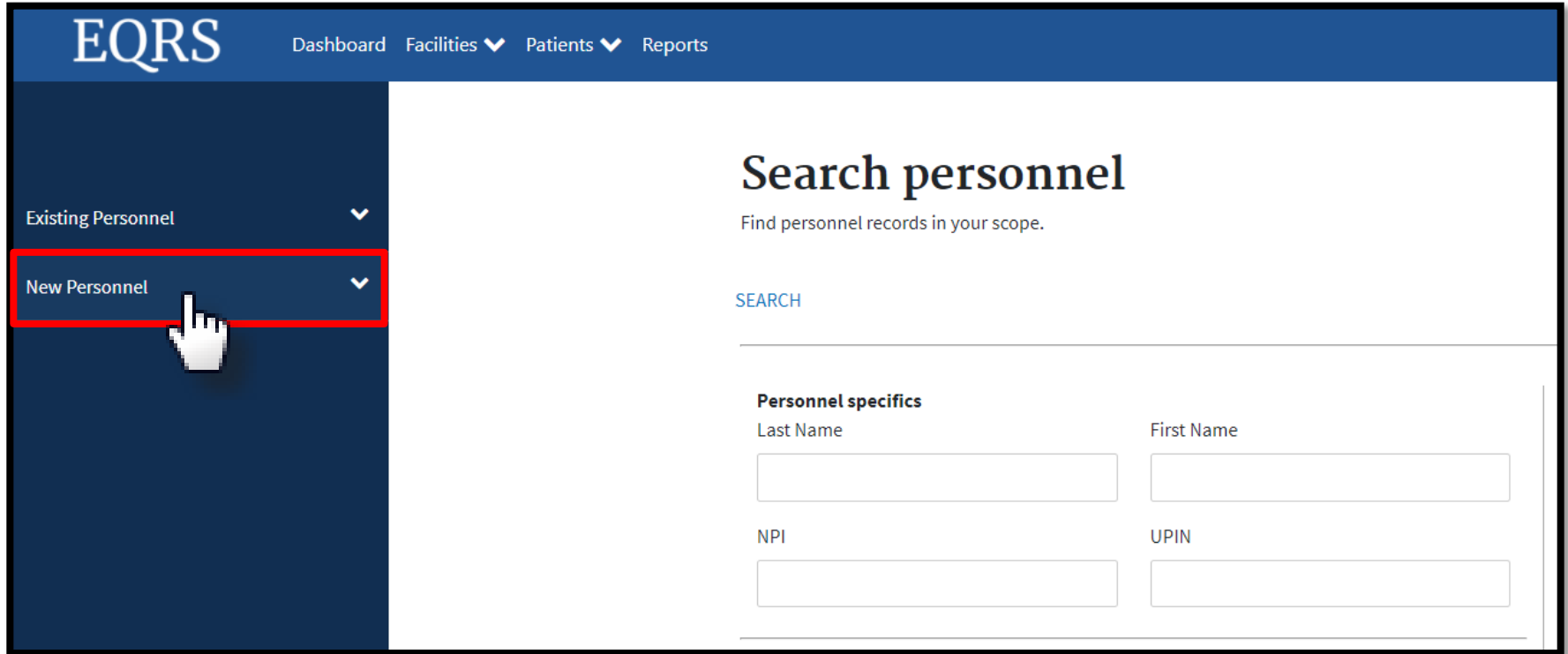
Click **Personnel** in the navigation menu.



The screenshot shows the EQRS application interface. The top navigation bar is dark blue with the EQRS logo on the left and menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow), and Reports. The Facilities dropdown menu is open, showing options: Search facilities, Form 2744, Personnel (highlighted with a red box and a mouse cursor), and Request access. Below the dropdown, there are sections for MANAGE ACCESS (with sub-items: Pending requests) and PROFILE (with sub-item: Profile information). On the right side of the page, there is a 'My access' section with the text 'Click each application to view your approved roles and the organizations you have access to.' Below this text is a box containing the EQRS logo and a 'View access' link.

Click New Personnel

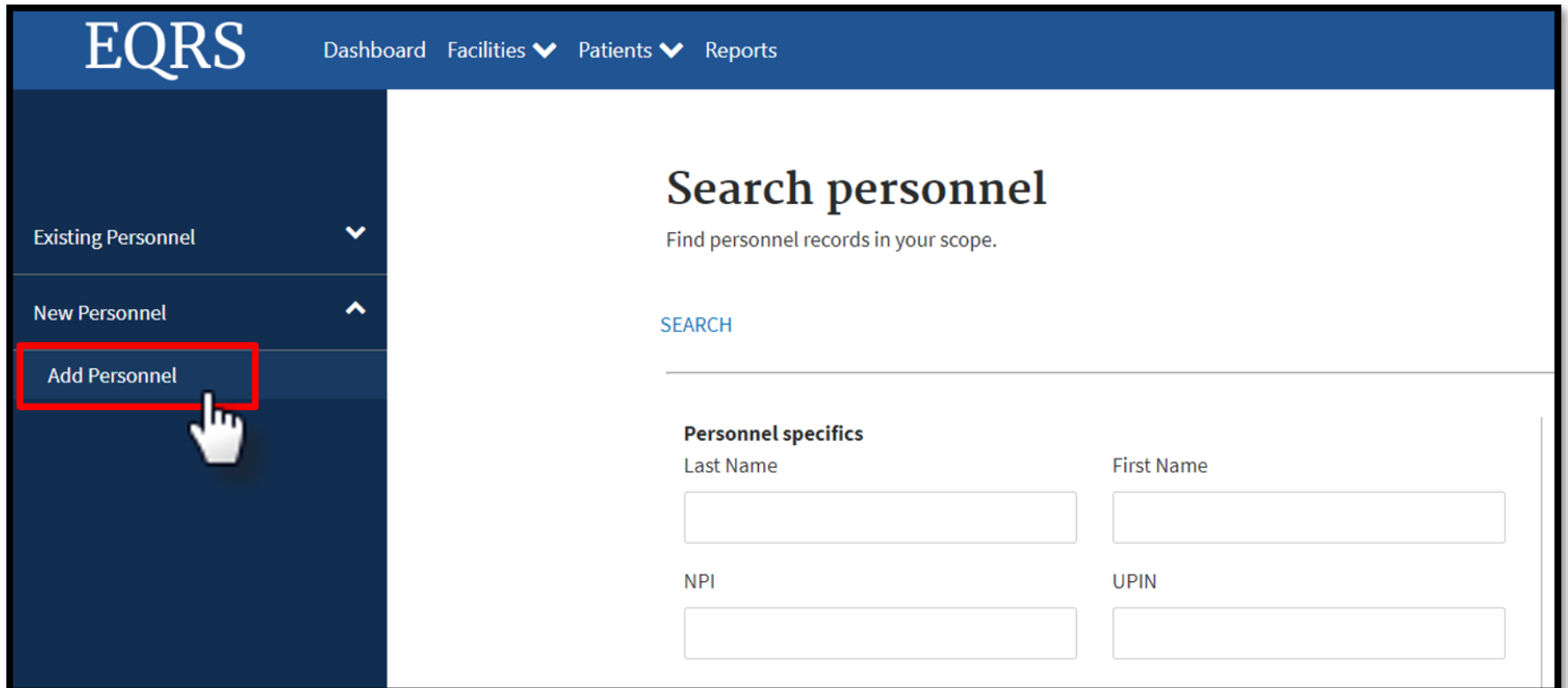
Click **New Personnel** to display menu options.



The screenshot displays the EQRS web application interface. The top navigation bar includes the logo 'EQRS' and menu items: 'Dashboard', 'Facilities', 'Patients', and 'Reports'. On the left side, a dark blue sidebar contains two menu items: 'Existing Personnel' and 'New Personnel'. The 'New Personnel' item is highlighted with a red rectangular border, and a white mouse cursor is positioned over it. The main content area on the right is titled 'Search personnel' and includes the instruction 'Find personnel records in your scope.' Below this, there is a 'SEARCH' section with a horizontal line. Underneath the line, the 'Personnel specifics' section contains four input fields: 'Last Name', 'First Name', 'NPI', and 'UPIN'.

Click Add Personnel

Click **Add Personnel** to enter information.



The screenshot displays the EQRS web application interface. The top navigation bar includes the EQRS logo and menu items: Dashboard, Facilities, Patients, and Reports. A left sidebar contains three main sections: Existing Personnel, New Personnel, and Add Personnel. The 'Add Personnel' button is highlighted with a red rectangular box, and a hand cursor is positioned over it. The main content area is titled 'Search personnel' and includes a search bar and a form for entering personnel information. The form is titled 'Personnel specifics' and contains four input fields: Last Name, First Name, NPI, and UPIN.

EQRS Dashboard Facilities Patients Reports

Existing Personnel

New Personnel

Add Personnel

Search personnel

Find personnel records in your scope.

SEARCH

Personnel specifics

Last Name First Name

NPI UPIN

Select Accordion

Click on the desired section to expand and view.

Add new personnel

[? Help](#)

Add new personnel and positions using the form below.

Personnel information ▼

Positions ▼

[Review](#)

Enter Personnel Information

Complete the Personnel Information section.

Add new personnel

[Help](#)

Add new personnel and positions using the form below.

Personnel information ^

Salutation First Name (required) Middle Initial Last Name (required)

Suffix Personnel NPI UPIN

Credentials

Organizational Unique Personnel Identifier

Address Line 1

Address Line 2

Zip Code Zip ext.

City State

Home phone

Cell phone

Fax

Email

Add Position


Indicate the employee's position and click **Add Positions**.

Positions ^

Facility Name ?

ABC DIALYSIS

Job Description ▼ Job Code Job Title

Add Positions 

Positions

Added positions from above form

Review

Click Review

Click **Review** for a final look before submission.

Positions

Facility Name
ABC DIALYSIS

Job Description: Job Code: Job Title:

Add Positions

Positions

Facility CCN	Facility NPI	Facility DBA	Job Description	Job Title	Job Code	Remove
123456	123456789123	ABC DIALYSIS	Facility Nephrologist	FNEPH		

Review

Click Submit

Review the entry and click **Submit**.

Review changes

Review the information and submit.

[Help](#)

Personnel Information

[Edit](#)

Salutation: Dr.	Personnel NPI: 7234567890
First Name: Meredith	Credentials: UPIN:
Middle Initial:	Organizational Unique Personnel Identifier:
Last Name: Grey	
Suffix:	

Address Line 1:	Home Phone:
Address Line 2:	Cell Phone:
City:	Fax Number:
State:	Email:
Zip Code:	Alternate Email:
County:	

Business Name:	Business Phone:
-----------------------	------------------------

Positions

[Edit](#)

Facility CCN	Facility NPI	Facility DBA	Job Description	Job Title	Job Code
123456	1588779326	ABC DIALYSIS	Facility Nephrologist		FNEPH

Submit

Successful Submission

EQRS displays “Personnel information added successfully” message.

View existing personnel Help

View the personnel record and make changes if needed

Personnel information added successfully
Please review your information below.

Personnel Information Edit

Salutation: Dr.	Personnel NPI: 7234567890
First Name: Meredith	Credentials: UPIN:
Middle Initial:	Organizational Unique Personnel Identifier:
Last Name: Grey	
Suffix:	

Address Line 1:	Home Phone:
Address Line 2:	Cell Phone:
City:	Fax Number:
State:	Email:
Zip Code:	Alternate Email:
County:	

Business Name:	Business Phone:
-----------------------	------------------------

Positions Edit

Facility CCN	Facility NPI	Facility DBA	Job Description	Job Title	Job Code
123456	1588779326	ABC DIALYSIS	Facility Nephrologist		FNEPH



Admit a Patient

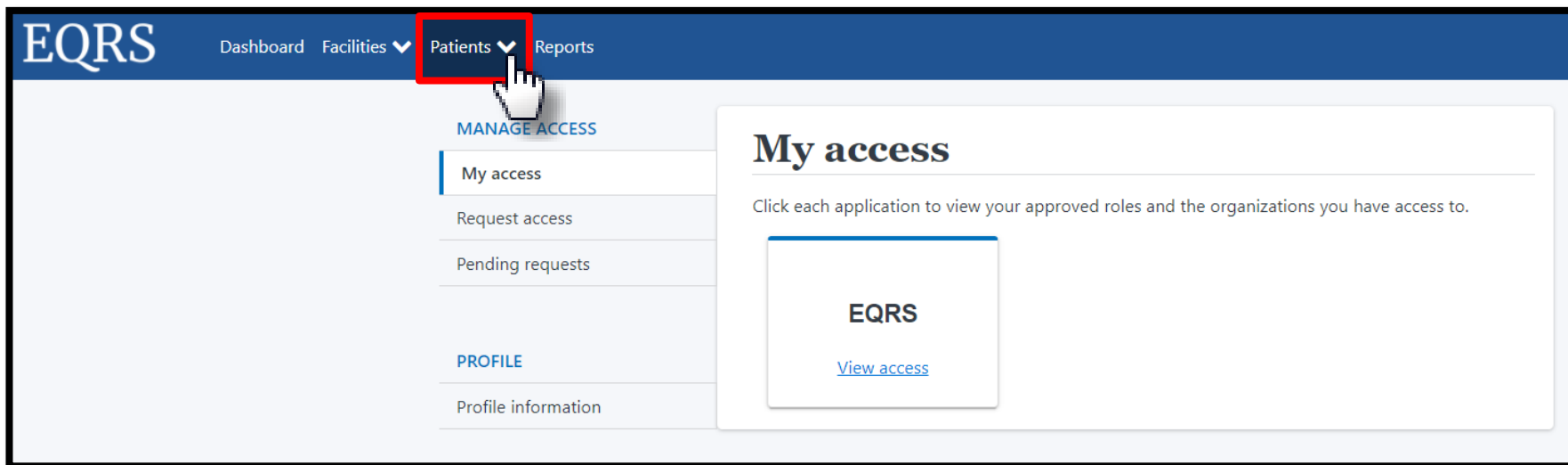
Key Identifiers

EQRS uses six key identifiers when transferring a patient:

- First Name
- Last Name
- Date of Birth
- Gender
- Social Security Number
- Medicare Beneficiary Identifier

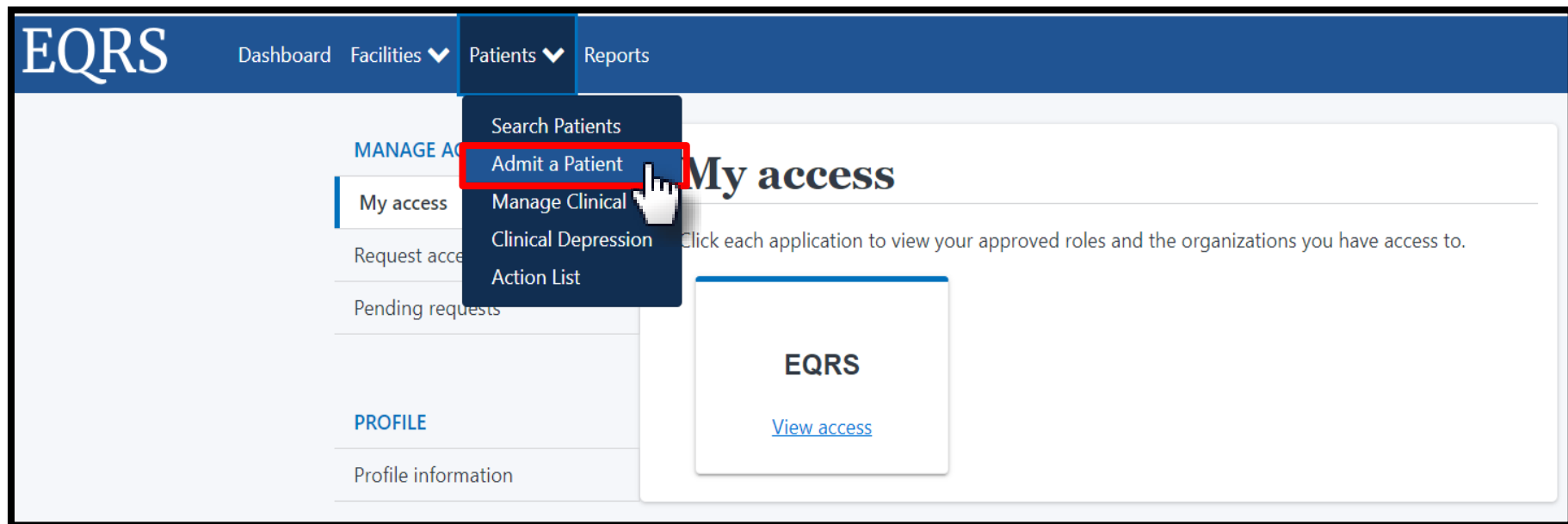
Click Patients

Click **Patients** in the navigation menu.



Click Admit Patient

Click **Admit Patient** in the Patients sub-menu.



The screenshot displays the EQRS web application interface. The top navigation bar includes 'EQRS', 'Dashboard', 'Facilities', 'Patients', and 'Reports'. The 'Patients' menu is expanded, showing options: 'Search Patients', 'Admit a Patient', 'Manage Clinical', 'Clinical Depression', and 'Action List'. The 'Admit a Patient' option is highlighted with a red rectangle and a mouse cursor. The main content area features a 'My access' section with a 'View access' link and an 'EQRS' card with a 'View access' link. The left sidebar contains 'MANAGE ACCESS' (My access, Request access, Pending requests) and 'PROFILE' (Profile information).

Enter Patient Information

Enter data in the Patient Information section.

Admit Patient Help

Complete the sections below to admit a patient in EQRS.

[Expand All](#)

Patient Information

Patient's first name *	<input type="text" value="Itsa"/>	Middle initial	<input type="text"/>
Patient's last name *	<input type="text" value="Patient"/>	Suffix	<input type="text" value=""/>
Date of birth *	Month: <input type="text" value="01"/> Day: <input type="text" value="01"/> Year: <input type="text" value="1960"/>	Gender *	<input type="text" value="Female"/>
Social Security Number *	<input type="text" value="987651234"/>	<input type="checkbox"/>	N/A
Medicare Beneficiary Identifier *	<input type="text"/>	<input checked="" type="checkbox"/>	N/A

Enter Admission Information

Enter data in the Admission Information section and click **Next**.

Admission Information ^

Admit Facility *

ABC DIALYSIS

Admit Date *

Month Day Year

06 23 2021

Admit Reason *

New ESRD Patient ▼

Next

Patient Match Message

Displays for new patient records says, “**No patient matches found.**”

Admit Patient Help

No patient matches found. New patient record will be created.

Complete the sections below to admit a patient in EQRS. Expand All

Patient Information

Patient's first name *	Middle initial
Captain	
Patient's last name *	Suffix
America	
Date of birth *	Gender *
Month: 04 Day: 25 Year: 1975	Male
Social Security Number *	<input type="checkbox"/> N/A
553245869	
Medicare Beneficiary Identifier *	<input checked="" type="checkbox"/> N/A

Additional Fields Display

EQRS displays additional fields for data entry.

Complete the sections below to admit a patient in EQRS. [Expand All](#)

Patient Information ▼

Ethnicity, race, tribe and origin ▼

Contact Information ▼

Miscellaneous Information ▼

Medical Information ▼

Admission Information ▲

Admit Facility *
ABC DIALYSIS

Admit Date *

Month Day Year

Admit Reason *
 ▼

Dialysis Treatment Information ▼

Enter Race and Ethnicity

Enter race and ethnicity, and tribe and origin, if applicable.

Ethnicity, race, tribe and origin ^

Patient's Self Reporting Of Race and Ethnicity

Self Reported by Patient ▼

Ethnicity

Not Hispanic or Latino ▼

Race (check all that apply)

White

Asian

Black or African American

Native Hawaiian or Other Pacific Islander

American Indian/Alaska Native

Other

Tribe and Origin

Name of Enrolled/Principal Tribe ▼ **Country/Area Of Origin** ▼

Enter Contact Information

Enter the mailing address.

Contact Information ^

Do not contact

Mailing address

Address Line 1 Address Line 2

123 Patient Lane

Zip Code Zip ext. (optional)

33607

City State * County

Tampa Florida Hillsborough

Provide Physical Address

Provide the physical address.

Contact Information

Do not contact

Mailing address

Address Line 1
123 Patient Lane

Address Line 2

Zip Code
33607

Zip ext. (optional)

City
Tampa

State *
Florida

County
Hillsborough

Physical address same as mailing address

Is the patient in a nursing home setting?

Nursing Home Setting

Permanent Resident

Short Term Care/Rehabilitation

Other

Home
(813)333-1234

Work
(813)888-1234

Work Extn.
22

Email
email@email.com

Enter Miscellaneous Info

Enter data in the Miscellaneous Information section.

Miscellaneous Information ^

Current status	Effective date		
Medicare enrollment *	Month	Day	Year
Medicare Application Pending ▼	06	23	2021
Citizenship	Month	Day	Year
US Citizen ▼	06	23	2021
Employment	Month	Day	Year
Employed Part Time ▼	06	23	2021
School	Month	Day	Year
▼	MM	DD	YYYY
Vocational Rehabilitation	Month	Day	Year
▼	MM	DD	YYYY

Enter Effective Date

Enter the Medical Information effective date.

Medical Information ^

Effective date *

Month Day Year

Review Admission Information

The Admission Information section is pre-populated.

Admission Information ^

Admit Facility *
ABC DIALYSIS

Admit Date *

Month Day Year

06 23 2021

Admit Reason *

New ESRD Patient ▼

Enter Dialysis Treatment Information

Add a new dialysis treatment.

Dialysis Treatment Information ^

Treatment Start Date *

Month Day Year

06 23 2021

Primary Dialysis Setting * **Dialysis Time Period**

Dialysis Facility/Center ▼ ▼

Expected Self-care Setting

▼

Enter Dialysis Treatment Information


Add a new dialysis treatment and click **Submit**.

Primary Type of Treatment *	Sessions Per Week	Time Per Session (minutes)			
Hemodialysis	3	240			
Attending Practitioner *	Attending Practitioner UPIN	Attending Practitioner NPI			
Fury, Nick		1780762971			
Type of Dialysis Training					
Dialysis Training Start Date	Dialysis Training End Date				
Month	Day	Year	Month	Day	Year
MM	DD	YYYY	MM	DD	YYYY

Submit

Successful Admission

EQRS displays “Patient admission was successful” message.

 **Successful**
Patient admission was successful.

View Patient Demographics (Itsa Patient - 3100008572)

[Edit](#) [Help](#)

[Collapse All](#)

Patient Information ^

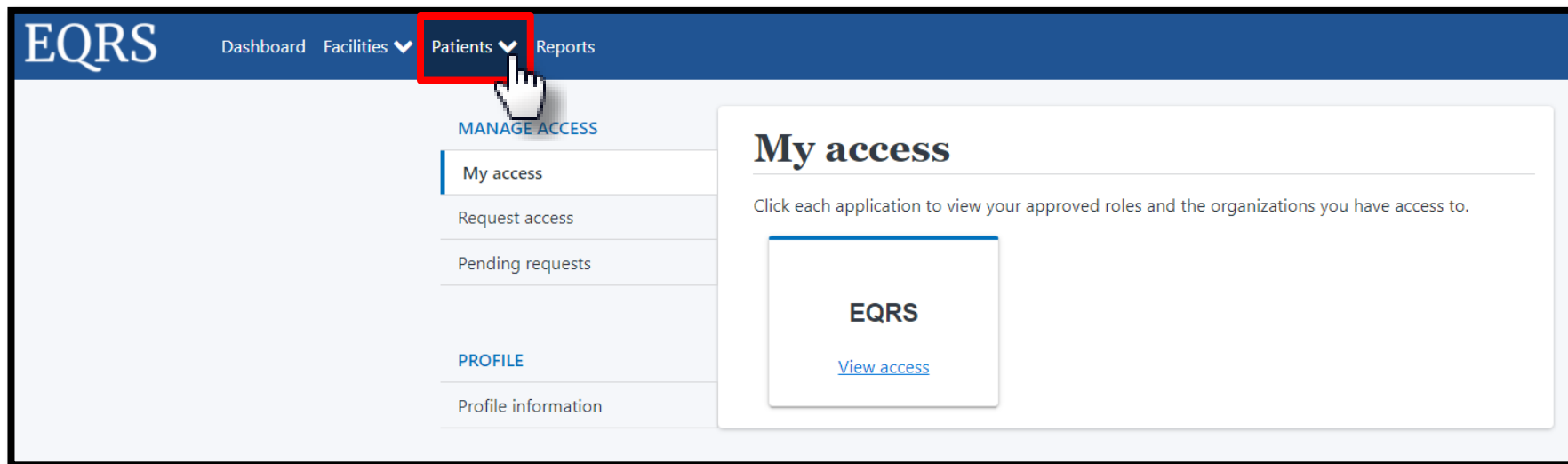
Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	



View and Edit Patient Details

Click Patients

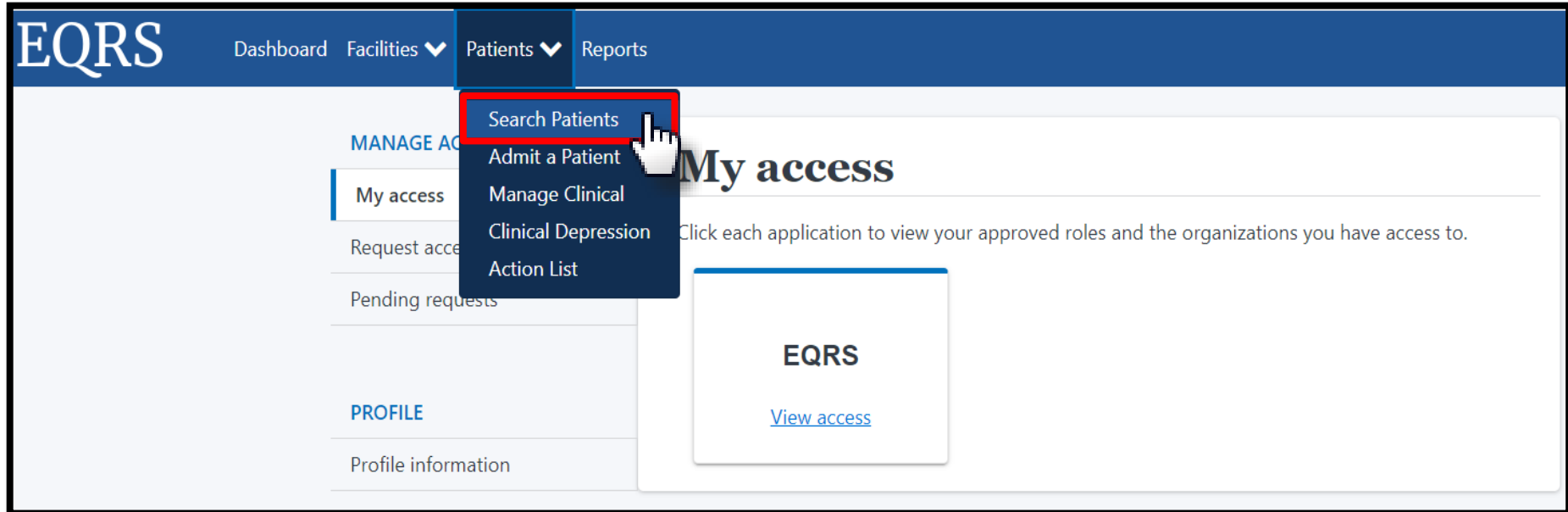
Click **Patients** in the navigation menu.



The screenshot shows the EQRS application interface. The top navigation bar is dark blue and contains the EQRS logo on the left and the following menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow and a red box around it), and Reports. A mouse cursor is pointing at the Patients menu item. Below the navigation bar, the main content area is light gray. On the left, there is a sidebar menu with two sections: 'MANAGE ACCESS' and 'PROFILE'. Under 'MANAGE ACCESS', there are three items: 'My access' (highlighted with a blue vertical bar), 'Request access', and 'Pending requests'. Under 'PROFILE', there is one item: 'Profile information'. On the right, there is a white box titled 'My access' with a horizontal line below the title. Below the title, there is a paragraph of text: 'Click each application to view your approved roles and the organizations you have access to.' Below this text is a white box with a blue border containing the text 'EQRS' and a blue link labeled 'View access'.

Click Search Patients

Click **Search Patients** in the Patients sub-menu.



Enter Search Criteria

Enter search criteria to locate patient.

Search Patients

Use the criteria below to search for a patient. [Help](#)

SEARCH

Patient criteria		Criteria	Clear all
Patient's First Name	Patient's Last Name	Patient's First Name	
<input type="text" value="Itsa"/>	<input type="text" value="Patient"/>	<input type="text" value="✖ Itsa"/>	
Medicare Beneficiary Identifier	Social Security Number	Patient's Last Name	
<input type="text"/>	<input type="text"/>	<input type="text" value="✖ Patient"/>	
HICNUM	EQRS Patient ID (aka CROWN UPI)	Admitted Facility	
<input type="text"/>	<input type="text"/>	ABC DIALYSIS	
SIMS UPI	Gender		<input type="button" value="Submit"/>
<input type="text"/>	<input type="text"/>		

Click EQRS Patient ID

Click the **EQRS Patient ID** (aka **CROWN UPI**).

Search Patient Results

[Help](#)

[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

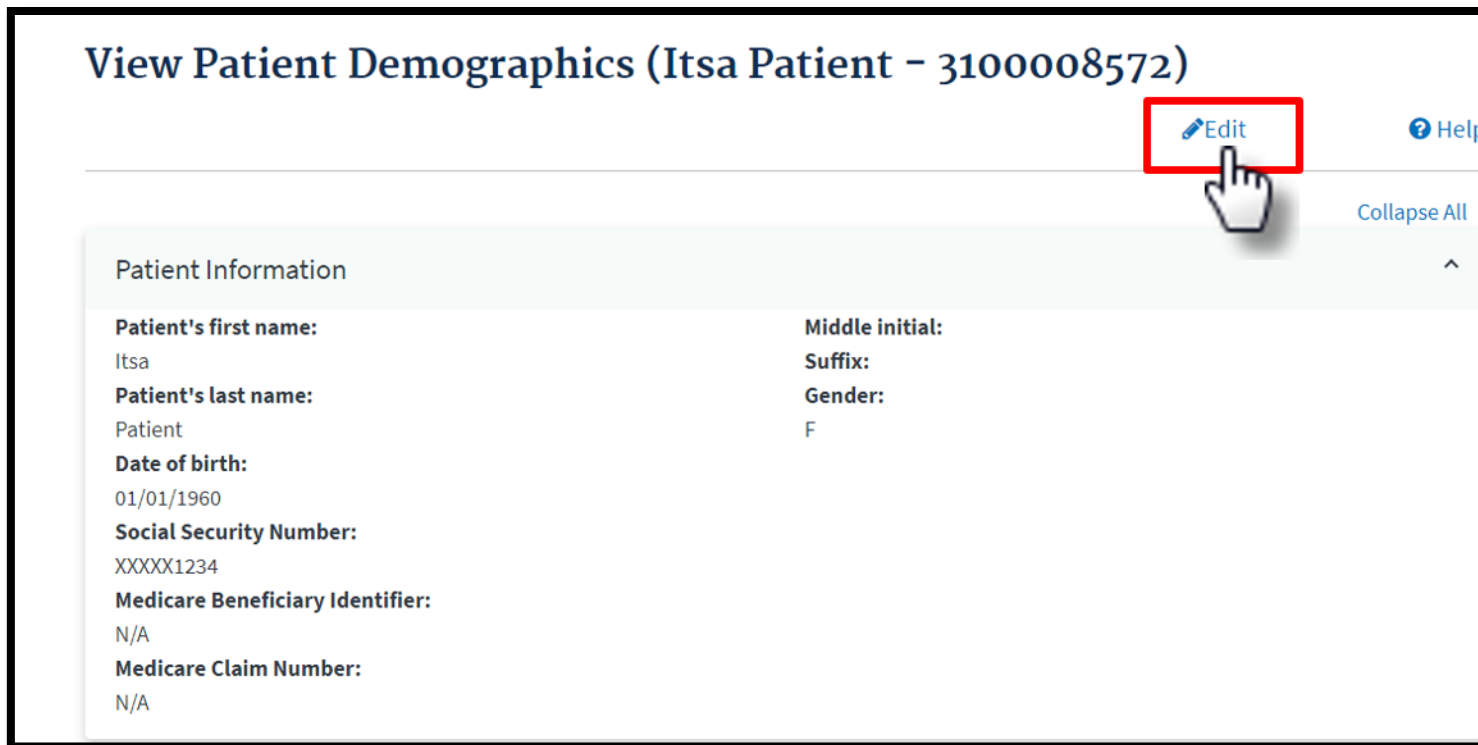
Page Size: 10

Showing 1 to 1 of 1 results

◀ Prev 1 Next ▶

Click Edit

Click **Edit** to update the patient's information.



The screenshot shows a web interface for viewing patient demographics. The title is "View Patient Demographics (Itsa Patient - 3100008572)". In the top right corner, there is a blue "Help" icon and a "Collapse All" link. Below the title bar, there is a red-bordered button with a pencil icon and the text "Edit". A hand cursor is pointing at the "Edit" button. The main content area is titled "Patient Information" and contains the following fields:

Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Enter Updates

Enter the desired updates.

Edit Patient (Itsa Patient - 3100008572) Help

Complete the sections below to edit a patient in EQRS. Expand All

Patient Information

Patient's first name *	<input type="text" value="Itsa"/>	Middle initial	<input type="text"/>
Patient's last name *	<input type="text" value="Patient"/>	Suffix	<input type="text" value=""/>
Date of birth *	<input type="text" value="01"/> <input type="text" value="01"/> <input type="text" value="1960"/>	Gender *	<input type="text" value="Female"/>
Social Security Number *	<input type="text" value="987651234"/>	<input type="checkbox"/> N/A	
Medicare Beneficiary Identifier *	<input type="text"/>	<input checked="" type="checkbox"/> N/A	

Submit Updates

Click the **Submit** button to process the desired updates.

Social Security Number

 N/A

Medicare Beneficiary Identifier

 N/A

Medicare Claim Number

 N/A

Ethnicity, race, tribe and origin ▼

Contact Information ▼


Miscellaneous Information ▼

Medical Information ▼



Successful Submission


EQRS displays “**Successfully edited patient**” message.

 **Successful**
Successfully edited patient.

View Patient Demographics (Itsa Patient - 3100008572)

[Edit](#) [Help](#)

[Collapse All](#)

Patient Information 

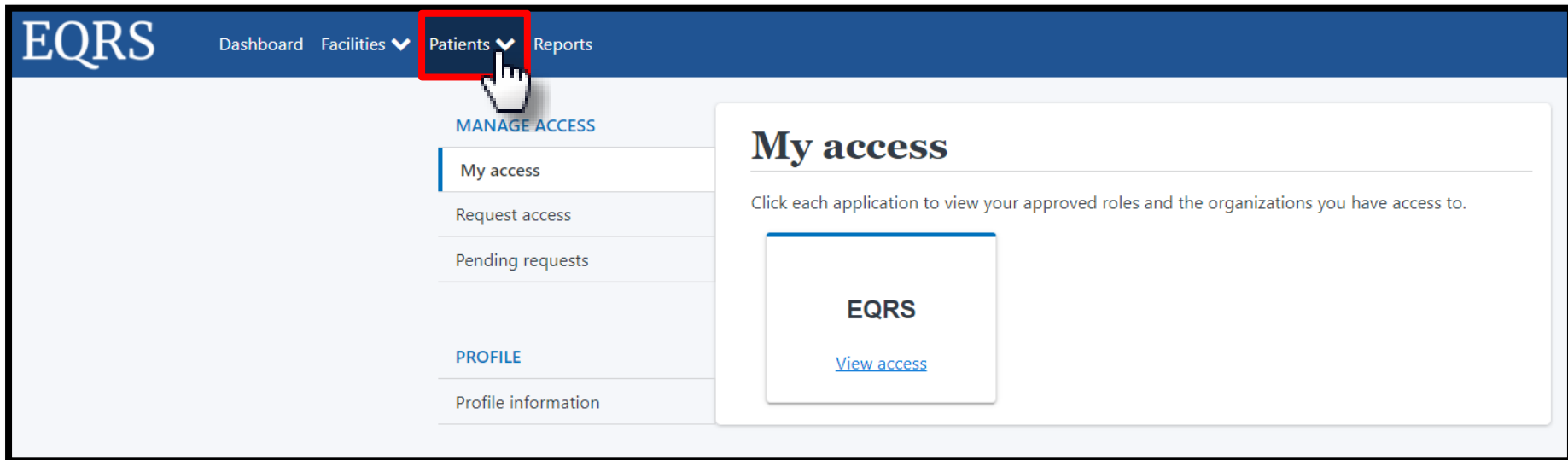
Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	



Submit an Initial CMS-2728

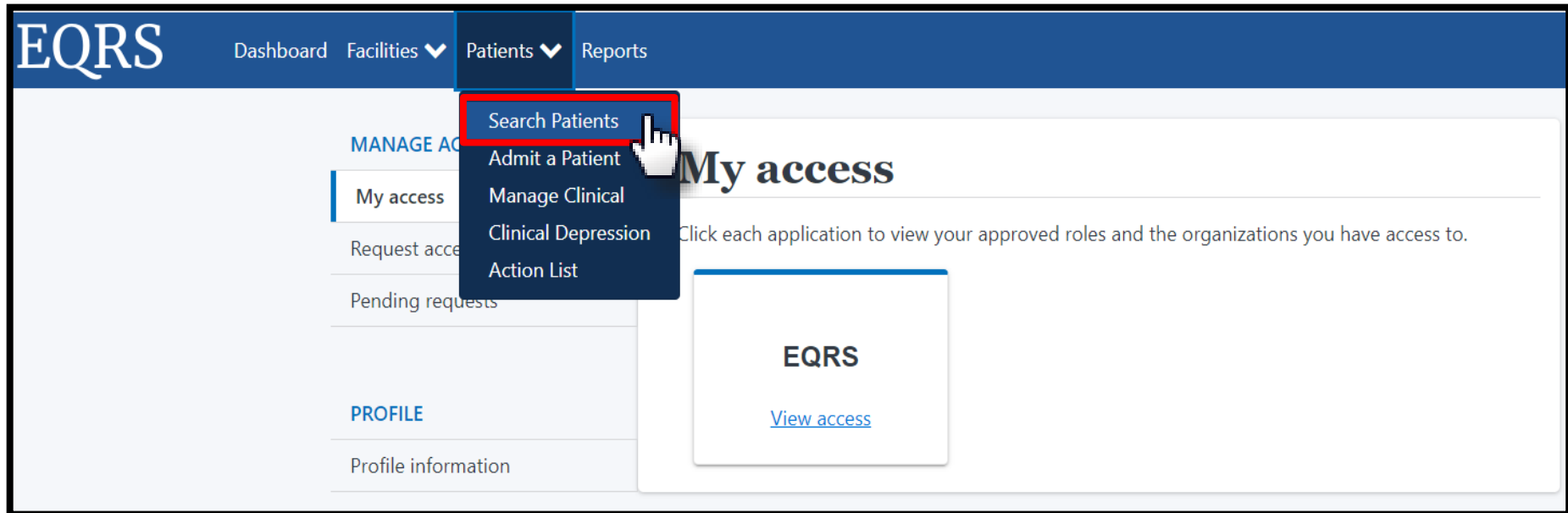
Click Patients

Click **Patients** in the navigation menu.



Click Search Patients

Click **Search Patients** in the Patients sub-menu.



Enter Search Criteria

Enter search criteria to locate patient and click **Submit**.

Search Patients

Use the criteria below to search for a patient. [? Help](#)

SEARCH

Patient criteria

Patient's First Name

Patient's Last Name

Medicare Beneficiary Identifier

Social Security Number

HICNUM

EQRS Patient ID (aka CROWN UPI)

SIMS UPI

Gender

Criteria [Clear all](#)

Patient's First Name

✖ Itsa

Patient's Last Name

✖ Patient

Admitted Facility

ABC DIALYSIS

Submit

Click EQRS Patient ID

Click the **EQRS Patient ID (aka CROWN UPI)**.

Search Patient Results ? Help

[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

Showing 1 to 1 of 1 results Page Size: 10 << Prev 1 Next >>

Click Form 2728

View the patient's demographics and click the **Form 2728** link.

The screenshot shows a web application interface for managing patient information. On the left is a sidebar titled 'MANAGE PATIENT' with a list of options: Patient, Patient History, Admissions, Treatments, Vaccinations, and Form 2728. The 'Form 2728' option is highlighted with a red rectangle and a mouse cursor. The main content area is titled 'View Patient Demographics (Itsa Patient - 3100008572)' and includes 'Edit' and 'Help' buttons. Below the title is a 'Patient Information' section with a 'Collapse All' button. The patient information is displayed in two columns:

Patient Information	
Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Add Initial 2728

Click **Add Initial 2728**.

Manage Form 2728 (Itsa Patient - 3100008572) [? Help](#)

Eligible 2728 Forms	Admit Date	Admit Facility	Due Date	Add 2728
Initial Dialysis	08/25/2020	ABC DIALYSIS	10/09/2020	Add Initial 2728

Existing 2728 Forms

Status	Admit Facility	Due Date	Date Submitted
No Form 2728s exist for this patient.			

CMS-2728 Section A

Review and complete Section A, as needed.

A. COMPLETE FOR ALL ESRD PATIENTS - 3100022040		
*Check One: <input checked="" type="checkbox"/> Initial <input type="checkbox"/> Re-entitlement <input type="checkbox"/> Supplemental		
(1) *Patient's Last Name Patient	*First Name Ista	MI
(2) Medicare Beneficiary Identifier or Social Security Number		(3) *Date of Birth 01/01/1960
(4) *Patient Mailing Address *Address Line 1: Address Line 2: *Zip: *City: *State: IN		(5) Phone Number:

CMS-2728 Section A (continued)

(6) *Sex Male		
(7) *Ethnicity Not Hispanic or Latino	(8) Country/Area of Origin or Ancestry	
(9) *Race White Name of Enrolled/Principal Tribe:	(10) *Is patient applying for ESRD Medicare coverage? <input type="text" value="v"/>	
(11) *Current Medical Coverage <input type="checkbox"/> Medicaid <input type="checkbox"/> VA <input checked="" type="checkbox"/> Medicare <input type="checkbox"/> Medicare Advantage <input type="checkbox"/> Employer Group Health Insurance <input type="checkbox"/> Other <input type="checkbox"/> None	(12) *Height <input type="text" value="191"/> <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Centimeters"/> <input type="text" value="v"/>	(13) *Dry Weight <input type="text" value="77"/> <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Kilograms"/> <input type="text" value="v"/>

CMS-2728 Section A (continued)

(14) *Primary cause of Renal Failure

25040

Diabetes with renal manifestations Type 2

(15) *Employment Status(6 mos prior and current status)

Prior:

Employed Part Time

Current:

Retired Due to Age/Preference

(16) *Co-Morbid Conditions

- | | |
|--|--|
| <input type="checkbox"/> a. Congestive heart failure | <input type="checkbox"/> n. Malignant neoplasm, Cancer |
| <input type="checkbox"/> b. Atherosclerotic heart disease ASHD | <input type="checkbox"/> o. Toxic nephropathy |
| <input checked="" type="checkbox"/> c. Other cardiac disease | <input type="checkbox"/> p. Alcohol dependence |
| <input type="checkbox"/> d. Cerebrovascular disease, CVA, TIA* | <input type="checkbox"/> q. Drug dependence* |
| <input checked="" type="checkbox"/> e. Peripheral vascular disease* | <input type="checkbox"/> r. Inability to ambulate |
| <input checked="" type="checkbox"/> f. History of hypertension | <input type="checkbox"/> s. Inability to transfer |
| <input type="checkbox"/> g. Amputation | <input type="checkbox"/> t. Needs assistance with daily activities |
| <input type="checkbox"/> h. Diabetes, currently on insulin | <input type="checkbox"/> u. Institutionalized |
| <input checked="" type="checkbox"/> i. Diabetes, on oral medications | <input type="checkbox"/> u1. Institutionalized - Assisted Living |
| <input type="checkbox"/> j. Diabetes, without medications | <input type="checkbox"/> u2. Institutionalized - Nursing Home |
| <input type="checkbox"/> k. Diabetic retinopathy | <input type="checkbox"/> u3. Institutionalized - Other Institution |
| <input type="checkbox"/> l. Chronic obstructive pulmonary disease | <input type="checkbox"/> v. Non-renal congenital abnormality |

CMS-2728 Section A (continued)

(17) *Prior to ESRD therapy:

a. Did patient receive exogenous erythropoietin or equivalent?

No ▼

If Yes, answer:

▼

b. Was patient under care of nephrologist?

Yes ▼

If Yes, answer:

▼

c. Was patient under care of kidney dietitian?

No ▼

If Yes, answer:

▼

d. What access was used on first outpatient dialysis:

Catheter ▼

If not AVF, then:

a. Is maturing AVF present?

Yes ▼

b. Is maturing graft present?

No ▼

CMS-2728 Section A (continued)

(18) Laboratory Values Within 45 Days Prior to the Most Recent ESRD Episode (Lipid Profile Within 1 Year of Most Recent ESRD Episode)

Laboratory Test	Value	Date		
a.1 Serum Albumin (g/dl)	<input type="text"/>	Month <input type="text" value="MM"/>	Day <input type="text" value="DD"/>	Year <input type="text" value="YYYY"/>
a.2 Serum Albumin Lower Limit	<input type="text"/>			
a.3 Lab Method Used (BCG or BCP)	<input type="text" value="v"/>			
b. *Serum Creatinine (mg/dl)	<input type="text" value="8.0"/>	Month <input type="text" value="06"/>	Day <input type="text" value="20"/>	Year <input type="text" value="2021"/>
c. Hemoglobin (g/dl)	<input type="text"/>	Month <input type="text" value="MM"/>	Day <input type="text" value="DD"/>	Year <input type="text" value="YYYY"/>
d. HbA1c	<input type="text"/>	Month <input type="text" value="MM"/>	Day <input type="text" value="DD"/>	Year <input type="text" value="YYYY"/>

CMS-2728 Section A (continued)

e. Lipid Profile TC	<input type="text"/>	Month MM	Day DD	Year YYYY
LDL	<input type="text"/>	Month MM	Day DD	Year YYYY
HDL	<input type="text"/>	Month MM	Day DD	Year YYYY
TG	<input type="text"/>	Month MM	Day DD	Year YYYY

Select Next Accordion Section

Click on the desired section to expand and view.

B. COMPLETE FOR ALL ESRD PATIENTS IN DIALYSIS TREATMENT



C. COMPLETE FOR ALL KIDNEY TRANSPLANT PATIENTS



D. COMPLETE FOR ALL ESRD SELF-DIALYSIS TRAINING PATIENTS (MEDICARE APPLICANTS ONLY)



E. PHYSICIAN IDENTIFICATION



F. OBTAIN SIGNATURE FROM PATIENT



Save

Submit

Cancel

CMS-2728 Section B

Review and complete Section B, as needed.

(19) Name of Dialysis Facility ABC DIALYSIS	(20a) Medicare Provider Number (for item 19)	(20b) Facility NPI (for item 19) ABC DIALYSIS
(21) *Primary Dialysis Setting Dialysis Facility/Center	(22) *Primary Type of Dialysis Hemodialysis Sessions Per Week: 3 / Hours Per Session: 3.5	
(23) *Date Regular Chronic Dialysis Began Month Day Year <input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/>	(24) *Date Patient Started Chronic Dialysis at Current Facility ABC DIALYSIS	
(25) *Has Patient Been Informed of Kidney Transplant Options? <input type="text" value="v"/>	(26) If patient NOT informed of transplant options, please check all that apply <input type="checkbox"/> Patient declined information <input type="checkbox"/> Patient is not eligible medically <input type="checkbox"/> Patient has not been assessed <input type="checkbox"/> Other	


CMS-2728 Section C

Review and complete Section C, as needed.

(27) *Date of Transplant	(28) Name of Transplant Hospital
(29a) Medicare Provider Number for Item 28	(29b) Facility NPI for Item 28
Date patient was admitted as an inpatient to a hospital in preparation for, or anticipation of, a kidney transplant prior to the date of actual transplantation.	
(30) Enter Date	(31) Name of Preparation Hospital
(32a) Medicare Provider Number for Item 31	(32b) Facility NPI for Item 31
(33) *Current Status of Transplant (if Functioning, skip items 35 and 36)	(34) *Type of Donor
(35) If Non-Functioning, Date of Return to Regular Dialysis	(36) Current Dialysis Treatment Site

CMS-2728 Section D

Review and complete Section D, as applicable.

(37) Name of Training Provider Find Facility by facility ID, facility name, facility DBA, facility CCN, facility NPI, phone number, fax number <input type="text"/> 			(38a) Medicare Provider Number of Training Provider (for item 37)	(38b) NPI of Training Provider
(39) Date Training Began Month Day Year <input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/>		(40) Type of Training <input type="text" value="v"/> <input type="text" value="v"/>		
(41) This Patient is Expected to Complete (or has completed) Training and will Self-dialyze on a Regular Basis <input type="text" value="v"/>		(42) Date When Patient Completed, or is Expected to Complete, Training Month Day Year <input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/>		
<i>I certify that the above self-dialysis training information is correct and is based on consideration of all pertinent medical, psychological, and sociological factors as reflected in records kept by this training facility.</i>				
(43) Printed Name and Signature of Physician personally familiar with the patient's training <input type="text" value="v"/>		Month Day Year <input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/>	(44a) UPIN of Physician in item 43	(44b) NPI of Physician in item 43

CMS-2728 Section E

Select the Attending Physician.

E. PHYSICIAN IDENTIFICATION		
(45) *Attending Physician <input type="text" value="Nick Fury"/>		(46) Physician's Phone No.
(47a) UPIN of Physician in item 45	(47b) NPI of Physician in item 45 1780762971	
PHYSICIAN ATTESTATION		
<p><i>I certify, under penalty of perjury, that the information on this form is correct to the best of my knowledge and belief. Based on diagnostic tests and laboratory findings, I further certify that this patient has reached the stage of renal impairment that appears irreversible and permanent and requires a regular course of dialysis or kidney transplant to maintain life. I understand that this information is intended for use in establishing the patient's entitlement to Medicare benefits and that any falsification, misrepresentation, or concealment of essential information may subject me to fine, imprisonment, civil penalty, or other civil sanctions under applicable Federal laws.</i></p>		
(49) *Date		
Month <input type="text" value="MM"/>	Day <input type="text" value="DD"/>	Year <input type="text" value="YYYY"/>
(52) Remarks <input type="text"/>		

Click Save

Select the GFR Calculation Method and click **Save**.

F. OBTAIN SIGNATURE FROM PATIENT


I hereby authorize any physician, hospital, agency, or other organization to disclose any medical records or other information about my medical condition to the Department of Health and Human Services for purposes of reviewing my application for Medicare entitlement under the Social Security Act and/or for scientific research.

(54) *Date

Month Day Year


Form Entered Date: 04/15/2021	Network: 10
GFR Calculation Method: <input type="text" value="MDRD IDMS standardized"/>	GFR: 0.0

Save **Submit** **Cancel**







Select Print

EQRS displays the “**Successfully saved form 2728**” message. Click the **Print** link.

 **Successful**
Successfully saved form 2728.

View ESRD Medical Evidence (2728) - Saved

 [Print](#)  [Edit](#)  [Delete](#)  [Help](#)

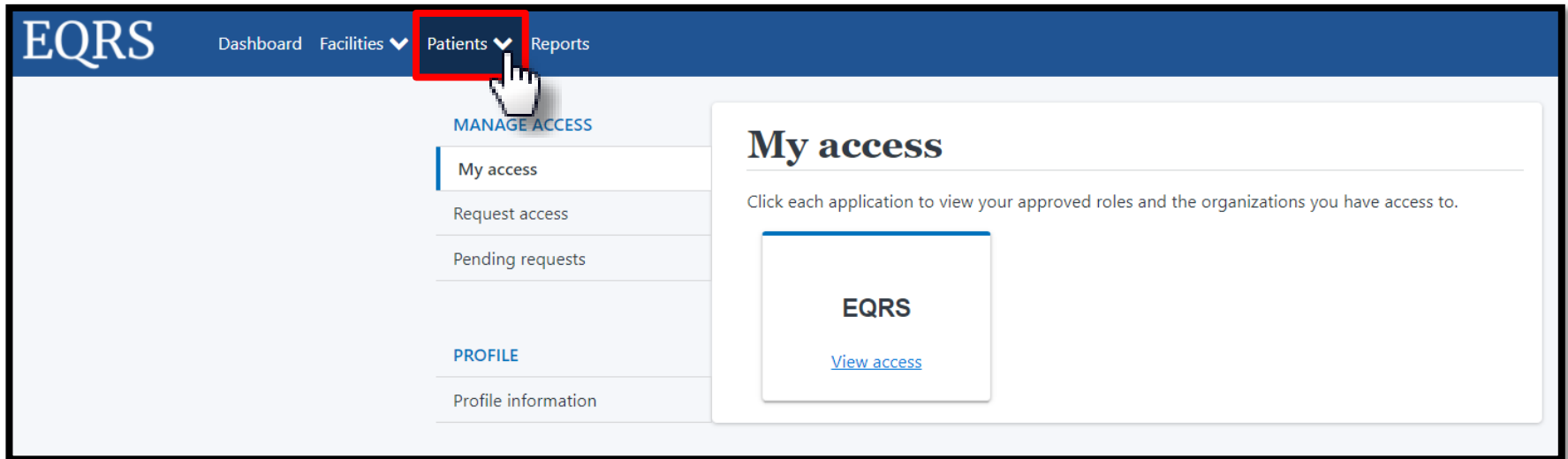
Submit Date: **CONTROL NUMBER 0938-0046 Expires 11/30/2022**

A. COMPLETE FOR ALL ESRD PATIENTS - 3100008572

<i>FormType:</i> Initial Dialysis		
(1) Patient's Last Name Patient	First Name Itsa	MI
(2) Medicare Beneficiary Identifier or Social Security Number XXX-XX-1234		(3) Date of Birth 01/01/1960

Form Signed: Click Patients

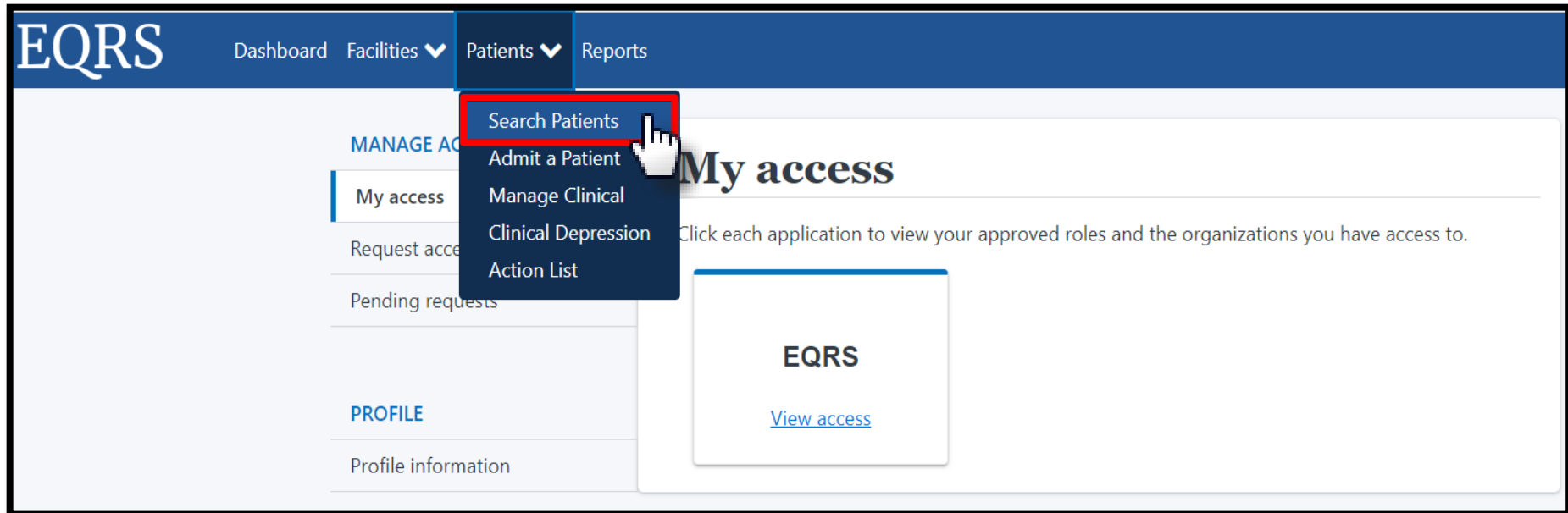
Click **Patients** in the navigation menu.



The screenshot shows the EQRS application interface. The top navigation bar is dark blue and contains the EQRS logo on the left and the following menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow and a red box around it), and Reports. A mouse cursor is pointing at the Patients dropdown arrow. Below the navigation bar, the main content area is light gray. On the left, there is a sidebar menu with two sections: 'MANAGE ACCESS' and 'PROFILE'. Under 'MANAGE ACCESS', there are three items: 'My access' (which is highlighted with a blue vertical bar on the left), 'Request access', and 'Pending requests'. Under 'PROFILE', there is one item: 'Profile information'. On the right side of the main content area, there is a white box titled 'My access' with a horizontal line underneath. Below the title, there is a line of text: 'Click each application to view your approved roles and the organizations you have access to.' Below this text is a white box with a blue border containing the text 'EQRS' and a blue link labeled 'View access'.

Click Search Patients

Click **Search Patients** in the Patients sub-menu.



Enter Search Criteria

Enter search criteria to locate patient and click **Submit**.

Search Patients

Use the criteria below to search for a patient. [? Help](#)

SEARCH

Patient criteria

Patient's First Name

Patient's Last Name

Medicare Beneficiary Identifier

Social Security Number

HICNUM

EQRS Patient ID (aka CROWN UPI)

SIMS UPI

Gender

Criteria [Clear all](#)

Patient's First Name

✖ Itsa

Patient's Last Name

✖ Patient

Admitted Facility

ABC DIALYSIS

Submit

Click EQRS Patient ID

Click the **EQRS Patient ID (aka CROWN UPI)**.

Search Patient Results ? Help

[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

Showing 1 to 1 of 1 results Page Size: 10 << Prev 1 Next >>

Click Form 2728

View the patient's demographics and click the **Form 2728** link.

The screenshot displays a web interface for managing patient information. On the left is a sidebar titled 'MANAGE PATIENT' with a list of options: Patient, Patient History, Admissions, Treatments, Vaccinations, and Form 2728. The 'Form 2728' option is highlighted with a red rectangle and a mouse cursor. The main content area is titled 'View Patient Demographics (Itsa Patient - 3100008572)' and includes 'Edit' and 'Help' buttons. Below the title is a 'Patient Information' section with a 'Collapse All' link. The patient information is as follows:

Patient Information	
Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Existing 2728 Forms: Initial Dialysis

Click the **Initial Dialysis** link.

Manage Form 2728 (Itsa Patient - 3100008572) Help

Eligible 2728 Forms Admit Date Admit Facility Due Date Add 2728

No Form 2728 is required for this patient.

Existing 2728 Forms Status Admit Facility Due Date Date Submitted

Initial Dialysis +	Saved	ABC DIALYSIS	10/09/2020	
------------------------------------	-------	--------------	------------	--

Click Edit

Click the **Edit** link.

View ESRD Medical Evidence (2728) - Saved

[Print](#) [Edit](#) [Delete](#) [Help](#)

Submit Date: OMB CONTROL NUMBER 0938-0046 Expires 11/30/2022

A. COMPLETE FOR ALL ESRD PATIENTS - 3100008572

<i>FormType:</i> Initial Dialysis		
(1) Patient's Last Name Patient	First Name Itsa	MI
(2) Medicare Beneficiary Identifier or Social Security Number XXX-XX-1234		(3) Date of Birth 01/01/1960
(4) Patient Mailing Address 123 Patient Lane Tampa, FL 33607		(5) Phone Number
(6) Sex Female	(7) Ethnicity Not Hispanic or Latino	(8) Country/Area of Origin or Ancestry
(9) Race White Asian		(10) Is patient applying for ESRD Medicare coverage? Yes

View Section E

Scroll down to Section E.

Edit an ESRD Medical Evidence (2728) - Saved

 Print

 Help

OMB CONTROL NUMBER 0938-0046 Expires 11/30/2022

[Expand All](#)

A. COMPLETE FOR ALL ESRD PATIENTS - 3100008572 

***Check One:**

Initial

Re-entitlement

Supplemental

(1) *Patient's Last Name

Patient

***First Name**

Itsa

MI

(2) Medicare Beneficiary Identifier or Social Security Number

XXX-XX-1234

(3) *Date of Birth

01/01/1960

Enter Date Physician Signed

Enter the date the physician signed the form.

E. PHYSICIAN IDENTIFICATION		
(45) *Attending Physician Nick Fury	(46) Physician's Phone No.	
(47a) UPIN of Physician in item 45	(47b) NPI of Physician in item 45 1780762971	
PHYSICIAN ATTESTATION		
<p><i>I certify, under penalty of perjury, that the information on this form is correct to the best of my knowledge and belief. Based on diagnostic tests and laboratory findings, I further certify that this patient has reached the stage of renal impairment that appears irreversible and permanent and requires a regular course of dialysis or kidney transplant to maintain life. I understand that this information is intended for use in establishing the patient's entitlement to Medicare benefits and that any falsification, misrepresentation, or concealment of essential information may subject me to fine, imprisonment, civil penalty, or other civil sanctions under applicable Federal laws.</i></p>		
(49) *Date		
Month MM	Day DD	Year YYY
(52) Remarks		
<div style="border: 1px solid gray; height: 100px;"></div>		

Enter Date Patient Signed and Submit

Enter the date the patient signed the form and click **Submit**.

F. OBTAIN SIGNATURE FROM PATIENT

I hereby authorize any physician, hospital, agency, or other organization to disclose any medical records or other information about my medical condition to the Department of Health and Human Services for purposes of reviewing my application for Medicare entitlement under the Social Security Act and/or for scientific research.


(54) *Date

Month	Day	Year
<input type="text" value="MM"/>	<input type="text" value="DD"/>	<input type="text" value="YYYY"/>

Form Entered Date: 04/15/2021	Network: 10
GFR Calculation Method: <input type="text" value="MDRD IDMS standardized"/>	GFR: 0.0

Successful Submission

EQRS displays the “Successfully submitted form 2728” message.

 **Successful**
Successfully submitted form 2728.

View ESRD Medical Evidence (2728) – Submitted

 Print

 Help

Submit Date: 06/24/2021

OMB CONTROL NUMBER 0938-0046 Expires 11/30/2022

A. COMPLETE FOR ALL ESRD PATIENTS - 3100021521

FormType:

Initial Dialysis

(1) Patient's Last Name

Patient

First Name

Itsa

MI

(2) Medicare Beneficiary Identifier or Social Security Number

XXX-XX-2828

(3) Date of Birth

12/12/1921

(4) Patient Mailing Address

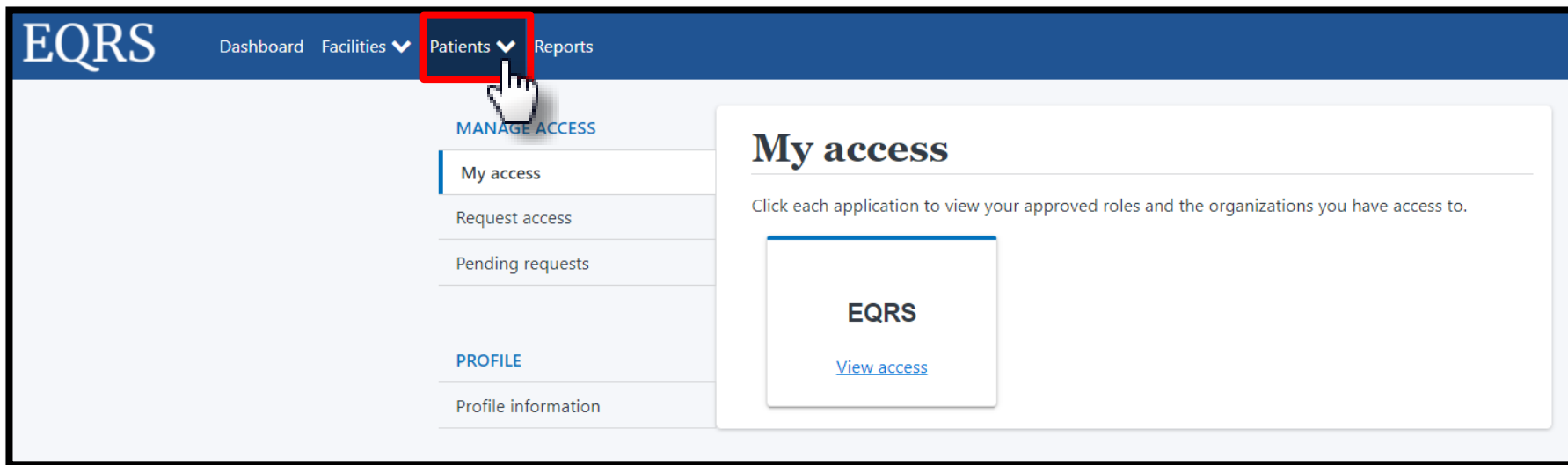
(5) Phone Number



Add Treatment Information

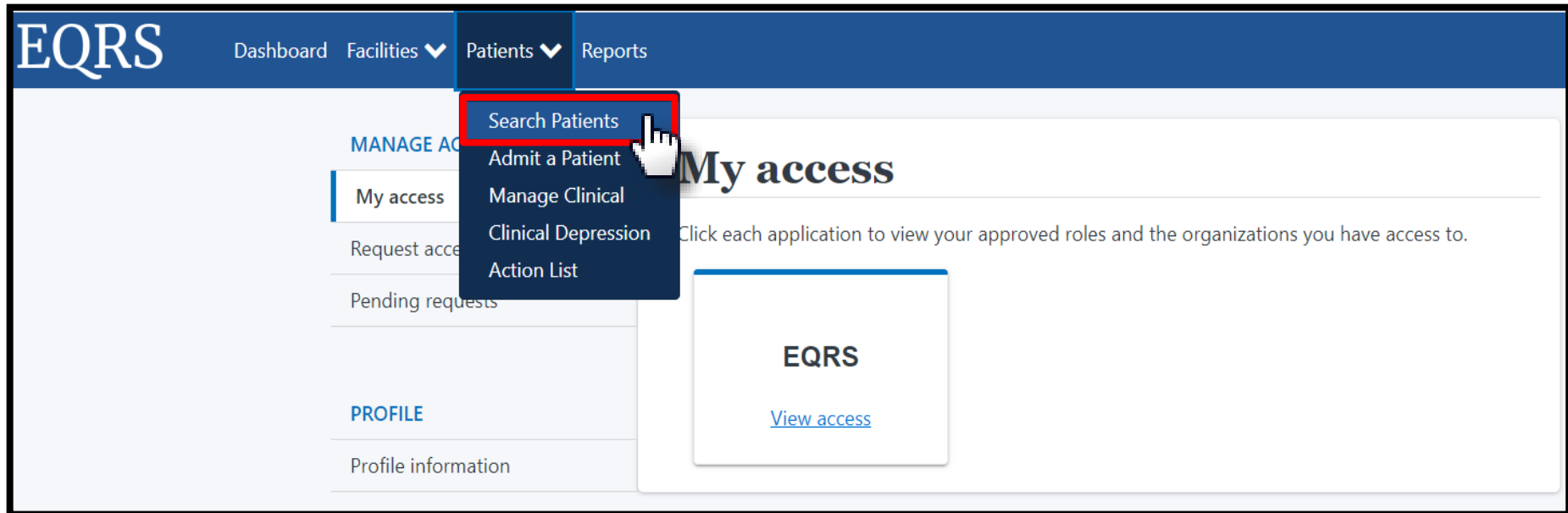
Click Patients

Click **Patients** in the navigation menu.



Click Search Patients

Click **Search Patients** in the Patients sub-menu.



Enter Search Criteria

Enter search criteria to locate patient and click **Submit**.

Search Patients

Use the criteria below to search for a patient. [? Help](#)

SEARCH

Patient criteria		Criteria	Clear all
Patient's First Name	Patient's Last Name	Patient's First Name	
<input type="text" value="Itsa"/>	<input type="text" value="Patient"/>	<input type="text" value="Itsa"/>	
Medicare Beneficiary Identifier	Social Security Number	Patient's Last Name	
<input type="text"/>	<input type="text"/>	<input type="text" value="Patient"/>	
HICNUM	EQRS Patient ID (aka CROWN UPI)	Admitted Facility	
<input type="text"/>	<input type="text"/>	<input type="text" value="ABC DIALYSIS"/>	
SIMS UPI	Gender		<input type="button" value="Submit"/>
<input type="text"/>	<input type="text"/>		

Click EQRS Patient ID

Click the **EQRS Patient ID (aka CROWN UPI)**.

Search Patient Results [? Help](#)

[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

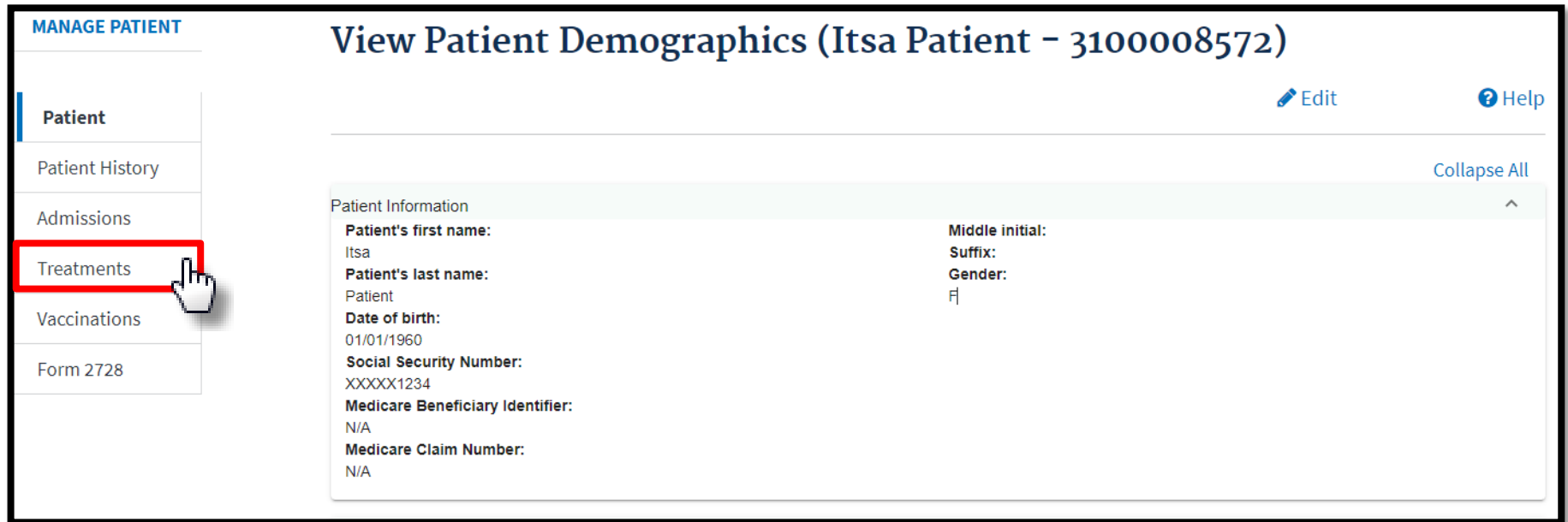
Page Size: 10

Showing 1 to 1 of 1 results

◀ Prev 1 Next ▶

Click Treatments

View the patient's demographics and click the **Treatments** link.



The screenshot shows a web application interface for managing a patient. On the left is a sidebar with a 'MANAGE PATIENT' header and several menu items: 'Patient', 'Patient History', 'Admissions', 'Treatments', 'Vaccinations', and 'Form 2728'. The 'Treatments' item is highlighted with a red rectangular box, and a mouse cursor is pointing at it. The main content area is titled 'View Patient Demographics (Itsa Patient - 3100008572)'. In the top right of this area are 'Edit' and 'Help' buttons. Below the title is a 'Collapse All' link. The main content is a 'Patient Information' section with a light green header and an upward arrow. It contains the following data:

Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Click Admit Date

Click the **Admit Date** link.

View patient treatments (Itsa Patient - 3100008572)

[? Help](#)

Select an admission to view associated treatments.

Admit Date	Admit Reason	Discharge Date	Discharge Reason	Facility Name	Facility CCN	Facility NPI
08/25/2020	New ESRD Patient			ABC DIALYSIS	123456	1234567819



Page Size

◀ Prev 1 Next ▶

Showing 1 to 1 of 1 results

10



Click New Treatment

Click the **New Treatment** link.

View patient treatments (Itsa Patient - 3100008572) [? Help](#)

Select an admission to view associated treatments.

Admit Date	Admit Reason	Discharge Date	Discharge Reason	Facility Name	Facility CCN	Facility NPI
08/25/2020	New ESRD Patient			ABC DIALYSIS	123456	1234567819

Page Size: 10 (Showing 1 to 1 of 1 results) [◀ Prev](#) 1 [Next ▶](#)

Treatment Summary (08/25/2020) [? Help](#)

Treatment Start Date	Treatment	Transplant Status	Attending Practitioner	UP	NPI
08/25/2020	Dialysis Facility/Center Hemodialysis	N/A	Fury, Nick	+ New Treatment	1234567819

Page Size: 10 (Showing 1 to 1 of 1 results) [◀ Prev](#) 1 [Next ▶](#)

Submit New Treatment

Enter the new treatment information. Click **Submit**.

Dialysis Treatment Information

Treatment Start Date *

Month: 09 Day: 01 Year: 2020

Primary Dialysis Setting * **Dialysis Time Period**

Expected Self-care Setting

Primary Type of Treatment * **Sessions Per Week** **Time Per Session (minutes)**

CAPD

Attending Practitioner * **Attending Practitioner UPIN** **Attending Practitioner NPI**

Grev, Meredith

Type of Dialysis Training

Dialysis Training Start Date **Dialysis Training End Date**

Month: MM Day: DD Year: YYYY Month: MM Day: DD Year: YYYY

Cancel **Submit**

Successful Submission

EQRS displays the “Treatment added successfully” message.

The screenshot displays the EQRS interface. At the top, there are filters for Treatment Start Date, Treatment, Transplant Status, Attending Practitioner, UPIN, and NPI. Below the filters is a table with two rows of treatment data. A green message box with a checkmark icon and the text "Successful Treatment added successfully." is highlighted with a red border. Below this, there is a section titled "View Treatment Information (09/01/2020)" with "Edit", "Delete", and "Help" buttons. The treatment information is displayed in a table format.

Treatment Start Date	Treatment	Transplant Status	Attending Practitioner	UPIN	NPI
09/01/2020	Home CAPD	N/A	Grey, Meredith		7234567890
08/25/2020	Dialysis Facility/Center Hemodialysis	N/A	Fury, Nick		1780762971

Page Size: 10
Showing 1 to 2 of 2 results

Successful
Treatment added successfully.

View Treatment Information (09/01/2020)

Buttons: Edit, Delete, Help

Treatment information

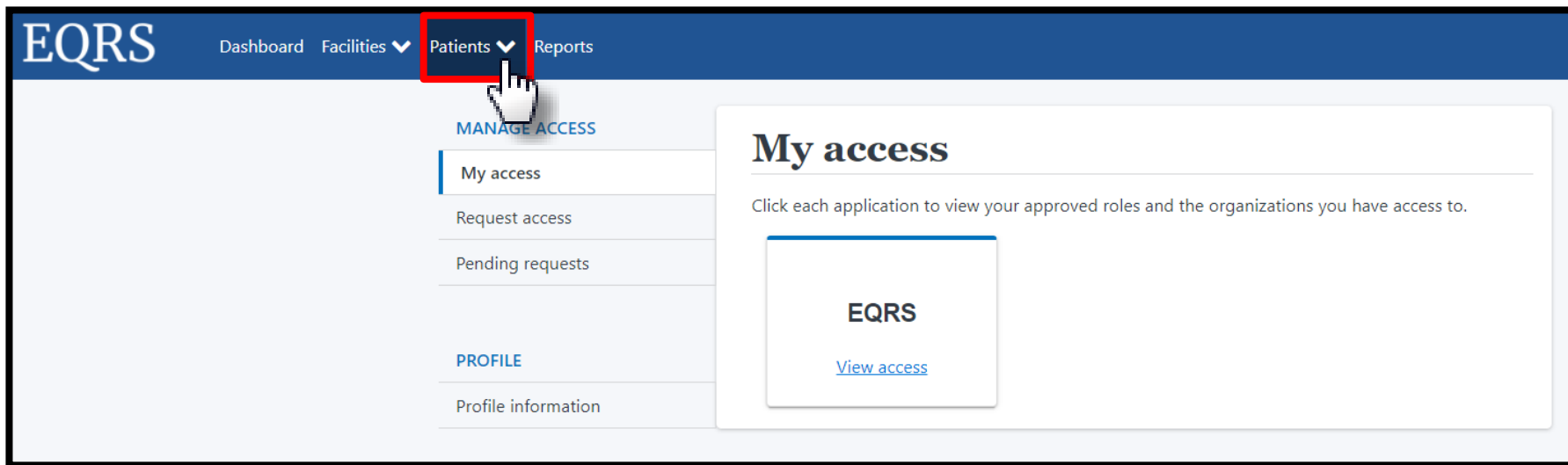
Treatment Start date: 09/01/2020	Submit date: 09/04/2020	
Primary Dialysis Setting: Home	Dialysis Time Period: N/A	Expected Self-care Setting: N/A
Primary Type of Treatment: CAPD	Sessions Per Week: N/A	Time Per Session (minutes): N/A
Attending Practitioner: Grey, Meredith	Attending Practitioner UPIN: N/A	Attending Practitioner NPI: 7234567890
Type of Dialysis Training: N/A	Dialysis Training Start Date: N/A	Dialysis Training End Date: N/A



Add Vaccination Information

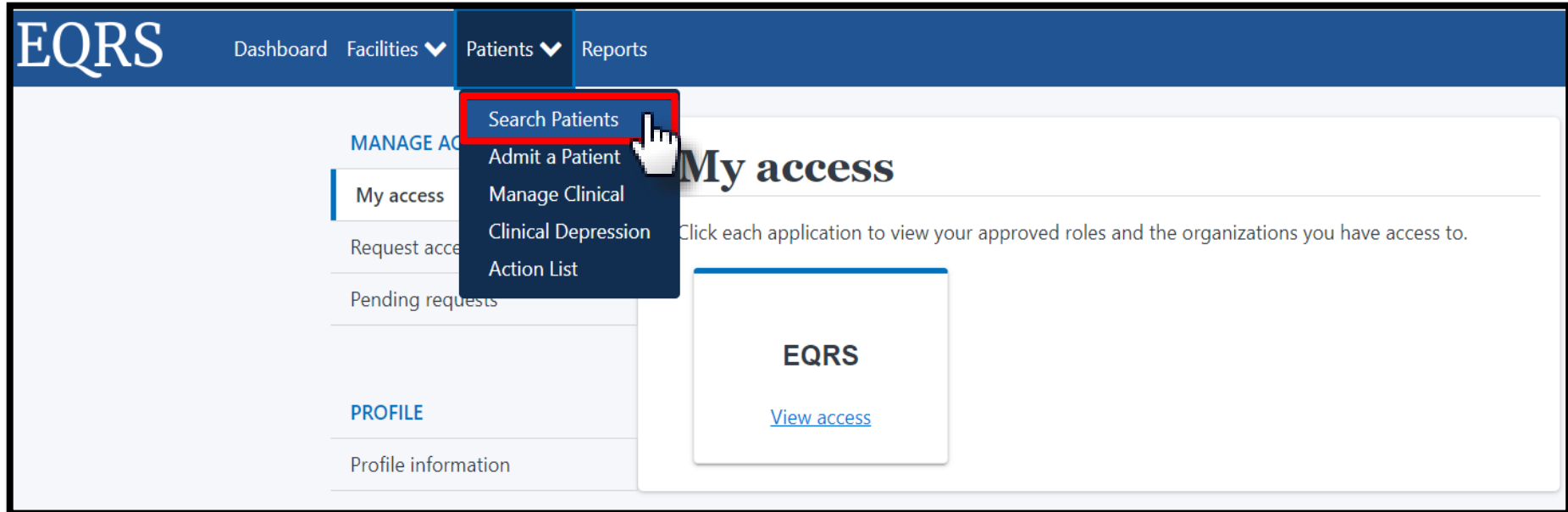
Click Patients

Click **Patients** in the navigation menu.



Click Search Patients

Click **Search Patients** in the Patients sub-menu.



Enter Search Criteria

Enter search criteria to locate patient and click **Submit**.

Search Patients

Use the criteria below to search for a patient. [? Help](#)

SEARCH

Patient criteria		Criteria	Clear all
Patient's First Name	Patient's Last Name	Patient's First Name	
<input type="text" value="Itsa"/>	<input type="text" value="Patient"/>	<input type="text" value="Itsa"/>	
Medicare Beneficiary Identifier	Social Security Number	Patient's Last Name	
<input type="text"/>	<input type="text"/>	<input type="text" value="Patient"/>	
HICNUM	EQRS Patient ID (aka CROWN UPI)	Admitted Facility	
<input type="text"/>	<input type="text"/>	<input type="text" value="ABC DIALYSIS"/>	
SIMS UPI	Gender		<input type="button" value="Submit"/>
<input type="text"/>	<input type="text"/>		

Click EQRS Patient ID

Click the **EQRS Patient ID (aka CROWN UPI)**.

Search Patient Results [Help](#)

[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

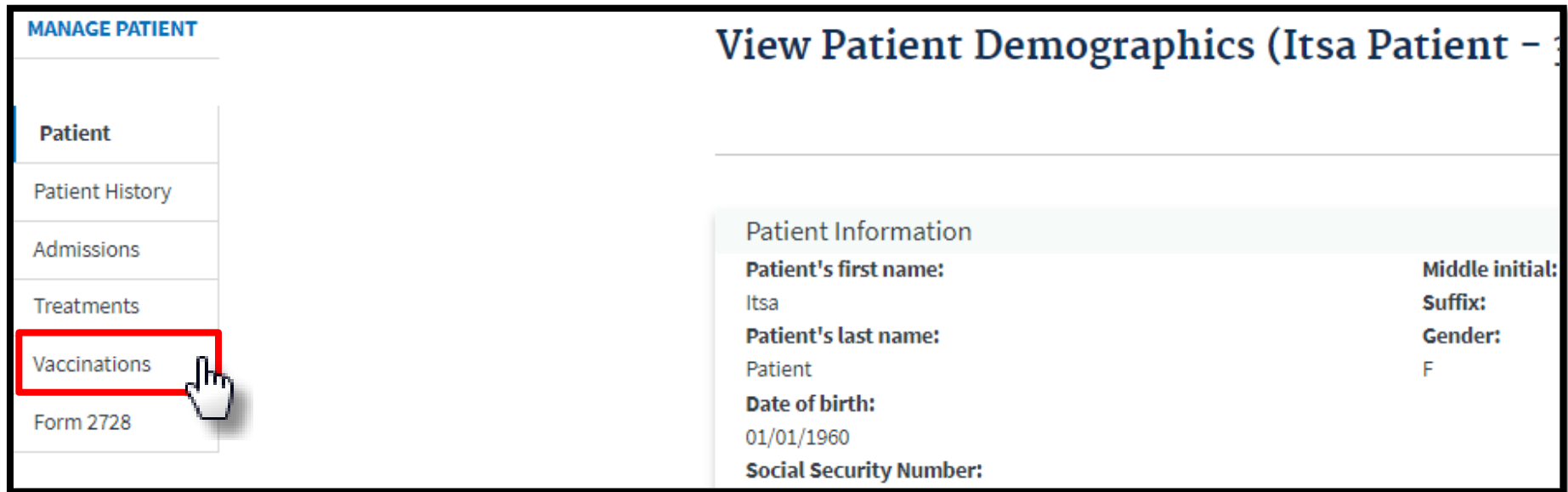
Page Size: 10

Showing 1 to 1 of 1 results

◀ Prev 1 Next ▶

Click Vaccinations

View the patient's demographics and click the **Vaccinations** link.



The screenshot shows a web interface for managing a patient. On the left, a sidebar titled "MANAGE PATIENT" contains a list of navigation options: Patient, Patient History, Admissions, Treatments, Vaccinations, and Form 2728. The "Vaccinations" option is highlighted with a red rectangular box, and a mouse cursor is positioned over it. The main content area is titled "View Patient Demographics (Itsa Patient -)". Below this title, there is a section for "Patient Information" with the following details:

Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number:	

Click Add Vaccination Data

Click the **Add Vaccination Data** link to add information for the desired vaccination.

Patient Vaccination Data

Itsa Patient (UPI: 3100008572)

Vaccinations Summary

It is required to document patient vaccinations which were received or not received when that event occurs. For more information please [click here](#). The information for Itsa Patient is below.
[Why does CMS collect this data?](#)

[Expand All](#) | [Collapse All](#)

> Hepatitis B	+ Add Vaccination Data
> Influenza	+ Add Vaccination Data
> Pneumococcal	+ Add Vaccination Data

Click Add Vaccination Data: Hepatitis B

Click the **Add Vaccination Data** link to enter Hepatitis B vaccination information.

Patient Vaccination Data

Itsa Patient (UPI: 3100008572)

Vaccinations Summary

It is required to document patient vaccinations which were received or not received when that event occurs. For more information please [click here](#). The information for Itsa Patient is below.
[Why does CMS collect this data?](#)

[Expand All](#) | [Collapse All](#)

> Hepatitis B	+ Add Vaccination Data
> Influenza	+ Add Vaccination Data
> Pneumococcal	+ Add Vaccination Data

Enter Vaccination Data: Hepatitis B

Review and enter the required vaccination data.

Add Vaccination Data ✕

Vaccination Type	Patient Name	UPI
HepatitisB	Itsa Patient	3100008572

* Indicates required field

*** Did the patient receive the HepatitisB vaccination?**

Yes, Received at Facility Yes, Received at Another Facility No

*** Is this dose part of a series or booster?**

Series Dose Booster Dose Dose Type Unknown

*** Vaccination Name**

Engerix-B ▾

*** Vaccination Date**

06/29/2022 📅

Click Add Vaccination Data: Hepatitis B

Click **Add Vaccination Data** to save your entry.

Approximate Date

Date Unknown

* Did the patient experience a serious adverse reaction to the vaccine? ⓘ

Yes No Unknown

* Did the patient receive the Hepatitis B surface antibody test?

Yes No Unknown

* Hepatitis B Surface Antibody (Anti-HBs)

* Hepatitis B Surface Antibody (Anti-HBs) Test Date

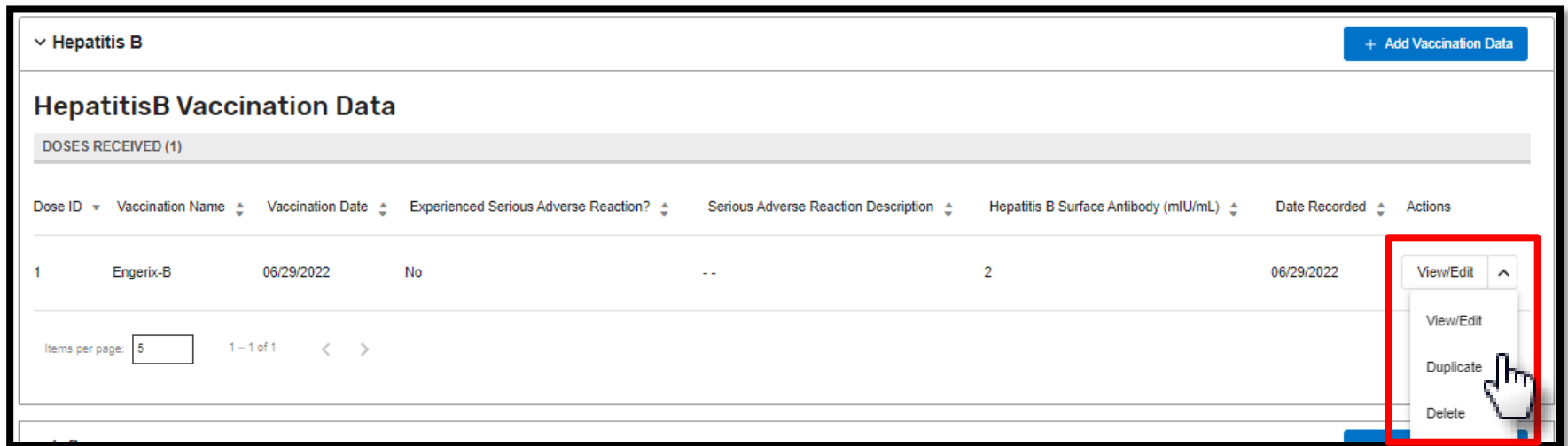
ⓘ

Date Unknown

Cancel **Add Vaccination Data**

View/Edit/Duplicate/Delete Vaccination Data: Hepatitis B

View/Edit/Duplicate/Delete Hepatitis B Vaccination Data, as needed.



The screenshot displays a web interface for managing Hepatitis B vaccination data. At the top left, there is a dropdown menu for "Hepatitis B" and a blue button labeled "+ Add Vaccination Data". Below this is a section titled "HepatitisB Vaccination Data" with a sub-header "DOSES RECEIVED (1)". A table lists the vaccination data with columns: Dose ID, Vaccination Name, Vaccination Date, Experienced Serious Adverse Reaction?, Serious Adverse Reaction Description, Hepatitis B Surface Antibody (mIU/mL), Date Recorded, and Actions. The table contains one row with the following data: Dose ID 1, Vaccination Name Engerix-B, Vaccination Date 06/29/2022, Experienced Serious Adverse Reaction? No, Serious Adverse Reaction Description --, Hepatitis B Surface Antibody (mIU/mL) 2, Date Recorded 06/29/2022. Below the table, there is a pagination control showing "Items per page: 5" and "1 - 1 of 1". A red box highlights the "Actions" column for the first row, which has a dropdown menu with options: View/Edit (with an up arrow), View/Edit, Duplicate, and Delete. A mouse cursor is pointing at the "Duplicate" option.

Dose ID	Vaccination Name	Vaccination Date	Experienced Serious Adverse Reaction?	Serious Adverse Reaction Description	Hepatitis B Surface Antibody (mIU/mL)	Date Recorded	Actions
1	Engerix-B	06/29/2022	No	--	2	06/29/2022	View/Edit View/Edit Duplicate Delete

Click Add Vaccination Data: Influenza

Click the **Add Vaccination Data** link to enter Influenza vaccination information.

Patient Vaccination Data

Itsa Patient (UPI: 3100008572)

Vaccinations Summary

It is required to document patient vaccinations which were received or not received when that event occurs. For more information please [click here](#). The information for Itsa Patient is below.
[Why does CMS collect this data?](#)

[Expand All](#) | [Collapse All](#)

> Hepatitis B	+ Add Vaccination Data
> Influenza	+ Add Vaccination Data
> Pneumococcal	+ Add Vaccination Data

Enter and Add Vaccination Data: Influenza

- Review and enter the required vaccination data.
- Click **Add Vaccination Data** to save your entry.

Add Vaccination Data ×

Vaccination Type	Patient Name	UPI
Influenza	Itsa Patient	3100008572

* Indicates required field

*** Did the patient receive the Influenza vaccination?**

Yes, Received at Facility Yes, Received at Another Facility No

*** Vaccination Name**

Fluzone High-Dose Quad (IIV4-HD) ▼

*** Vaccination Date**

11/17/2021 📅

Approximate Date

Date Unknown

*** Did the patient experience a serious adverse reaction to the vaccine?** ⓘ

Yes No Unknown

Cancel **Add Vaccination Data**


View/Edit/Delete Vaccination Data: Influenza

View/Edit/Delete Influenza Vaccination Data, as needed.

▼ Influenza + Add Vaccination Data

Influenza Vaccination Data

DOSES RECEIVED (1)

Dose ID ▼	Vaccination Name ▲	Vaccination Date ▲	Experienced Serious Adverse Reaction? ▲	Serious Adverse Reaction Description ▲	Date Recorded ▲	Actions
1	FluLaval (IIV4)	12/01/2021	No	--	06/15/2022	<div style="border: 2px solid red; padding: 5px;">View/Edit ▲ View/Edit Delete </div>

Items per page: 1 - 1 of 1 < >

Add Vaccination Data: Pneumococcal

Click the **Add Vaccination Data** link to enter Pneumococcal vaccination information.

Patient Vaccination Data

Itsa Patient (UPI: 3100008572)

Vaccinations Summary

It is required to document patient vaccinations which were received or not received when that event occurs. For more information please [click here](#). The information for Itsa Patient is below.
[Why does CMS collect this data?](#)

[Expand All](#) | [Collapse All](#)

> Hepatitis B	+ Add Vaccination Data
> Influenza	+ Add Vaccination Data
> Pneumococcal	+ Add Vaccination Data

Enter and Add Vaccination Data: Pneumococcal

- Review and enter the required vaccination data.
- Click **Add Vaccination Data** to save your entry.

Add Vaccination Data ✕

Vaccination Type	Patient Name	UPI
Pneumococcal	Itsa Patient	3100008572

* Indicates required field

*** Did the patient receive the Pneumococcal vaccination?**

Yes, Received at Facility Yes, Received at Another Facility No

*** Vaccination Name**

Pneumovax 23 (PPSV23) ▾

*** Vaccination Date**

06/20/2022 📅

Approximate Date

Date Unknown

*** Did the patient experience a serious adverse reaction to the vaccine?** ⓘ

Yes No Unknown

Cancel Add Vaccination Data

View/Edit/Delete Vaccination Data: Pneumococcal

View/Edit/Delete Pneumococcal Vaccination Data, as needed.

▼ Pneumococcal + Add Vaccination Data

Pneumococcal Vaccination Data

DOSES RECEIVED (1)

Dose ID	Vaccination Name	Vaccination Date	Experienced Serious Adverse Reaction?	Serious Adverse Reaction Description	Date Recorded	Actions
1	Pneumovax 23 (PPSV23)	06/20/2022	No	--	06/30/2022	<div style="border: 2px solid red; padding: 5px;">View/Edit ▲ View/Edit Delete</div>

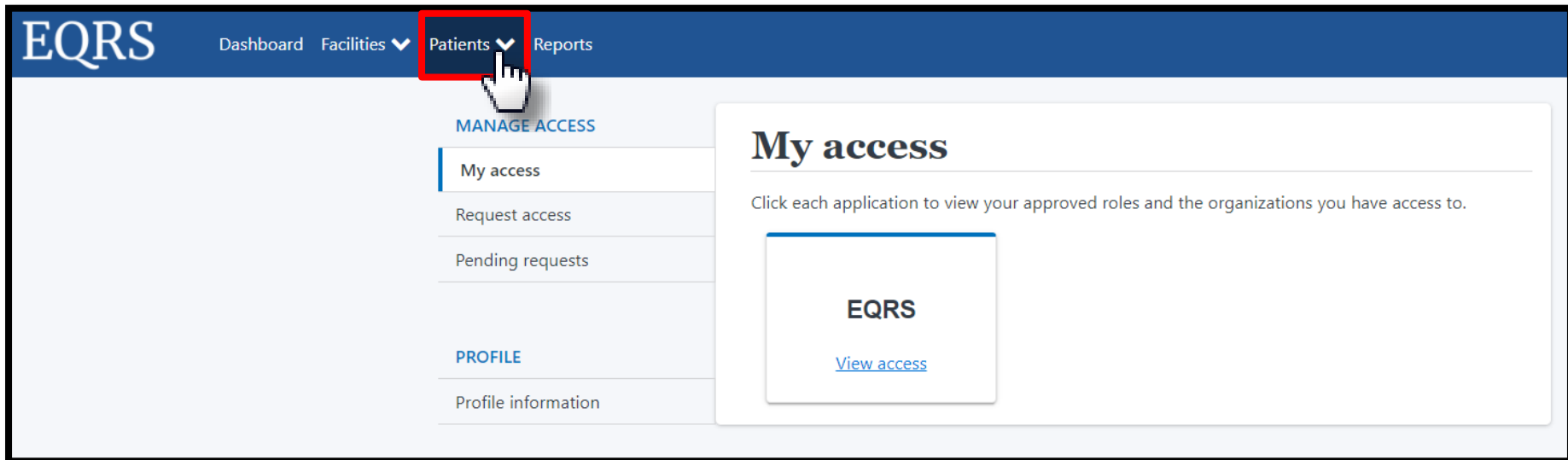
Items per page: 1 - 1 of 1 < >



Enter Clinical Information

Click Patients

Click **Patients** in the navigation menu.



Click Manage Clinical

Click **Manage Clinical** in the Patients sub-menu.

The screenshot displays the EQRS web application interface. The top navigation bar includes 'EQRS', 'Dashboard', 'Facilities', 'Patients', and 'Reports'. The 'Patients' menu is expanded, showing options: 'Search Patients', 'Admit a Patient', 'Manage Clinical' (highlighted with a red box and a mouse cursor), 'Clinical Depression', and 'Action List'. The main content area features a 'My access' section with the instruction 'Click each application to view your approved roles and the organizations you have access to.' Below this, there is a card for 'EQRS' with a 'View access' link.

Patient Search

Select the search criteria for the desired patient and click **Search Patients**.

Manage Patient Clinical Values Help

Info
No clinical data for selected facility, patient, and clinical month.

Patient Search

ABC DIALYSIS

Collection Type *
Hemodialysis

Clinical Month *
June 2021 (Open)

Last Name Group

Patient Clinical Status

Search Patients

Select Patient
Eight, Patient (3100020535)

EQRS Patient ID	Patient Name	Date of Birth	Medicare Beneficiary Identifier
3100020535	Patient Eight	03/15/1960	

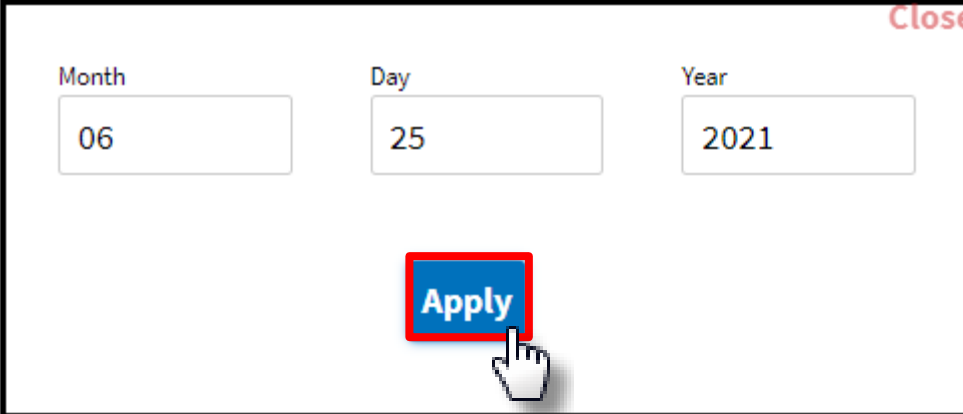
No Clinical Data Available for All Collection Types

Save **Reset** **Submit** **Delete**

Set Common Lab Test Date

Indicate the Common Lab Test Date to support data reporting efforts and Click **Apply**.

Common Lab Test Date: 06/25/2021



A screenshot of a web form for setting a common lab test date. The form is titled "Common Lab Test Date: 06/25/2021" in the top left. It contains three input fields: "Month" with the value "06", "Day" with the value "25", and "Year" with the value "2021". A red "Close" button is in the top right corner. A blue "Apply" button is centered below the input fields, with a red border and a mouse cursor pointing to it.

Enter Anemia Management

Review and enter Anemia Management data, if applicable.

Anemia Management				
Hemoglobin (Hgb) (g/dL) *	Month	Day	Year	<input type="checkbox"/> N/A
<input type="text" value="10"/>	<input type="text" value="08"/>	<input type="text" value="25"/>	<input type="text" value="2020"/>	
Ferritin (ng/mL) *	Month	Day	Year	<input type="checkbox"/> N/A
<input type="text" value="2000"/>	<input type="text" value="08"/>	<input type="text" value="25"/>	<input type="text" value="2020"/>	
Iron Saturation (TSAT) (%) *	Month	Day	Year	<input type="checkbox"/> N/A
<input type="text" value="60"/>	<input type="text" value="08"/>	<input type="text" value="25"/>	<input type="text" value="2020"/>	
Reticulocyte Hemoglobin (CHR) (pg) *	Month	Day	Year	<input type="checkbox"/> N/A
<input type="text" value="30"/>	<input type="text" value="08"/>	<input type="text" value="25"/>	<input type="text" value="2020"/>	

Enter Adequacy

Review and enter Adequacy data, if applicable.

Adequacy	
Kt/V * <input type="text" value="1.2"/>	Month <input type="text" value="08"/> Day <input type="text" value="26"/> Year <input type="text" value="2020"/> <input type="checkbox"/> N/A
Kt/V Method <input type="text" value="UKM (Urea Kinetic Modeling)"/>	
Blood Urea Nitrogen (BUN) Pre-Dialysis (mg/dL) * <input type="text" value="100"/>	<input type="checkbox"/> N/A
BUN Post-Dialysis (mg/dL) * <input type="text" value="35"/>	<input type="checkbox"/> N/A
Pre-Dialysis Weight * <input type="text" value="77"/>	Pre-Dialysis Weight Unit <input type="text" value="kg"/> <input type="checkbox"/> N/A
Post-Dialysis Weight * <input type="text" value="75"/>	Post-Dialysis Weight Unit <input type="text" value="kg"/> <input type="checkbox"/> N/A
Delivered Minutes of BUN Hemodialysis Session * <input type="text" value="240"/>	<input type="checkbox"/> N/A
Height * <input type="text" value="196"/>	Height Unit <input type="text" value="cm"/> <input type="checkbox"/> N/A
Serum Creatinine (mg/dL) * <input type="text" value="12.3"/>	Month <input type="text" value="MM"/> Day <input type="text" value="DD"/> Year <input type="text" value="YYYY"/> <input type="checkbox"/> N/A
Normalized Protein Catabolic Rate (nPCR) * <input type="text"/>	Month <input type="text" value="MM"/> Day <input type="text" value="DD"/> Year <input type="text" value="YYYY"/> <input checked="" type="checkbox"/> N/A
Total Number of Dialysis Sessions During the Clinical Month <input type="text" value="13"/>	

Add Ultrafiltration

Review and **Add** Ultrafiltration data, if applicable.

Ultrafiltration Help

Session UF ID	Session UF Date	Session UF Pre-Dialysis Weight	Session UF Post-Dialysis Weight	Session UF Delivered Minutes	Edit	Delete
31000058019	06/18/2021	77 kg	75 kg	240		

Session UF ID: Not Yet Assigned

Session UF Date

Month: Day: Year:

Session UF Pre-Dialysis Weight:

Session UF Post-Dialysis Weight:

Session UF Delivered Minutes:

Add

Enter Medication Reconciliation

Review and enter Medication Reconciliation data, if applicable.

Medication Reconciliation			
Medication Reconciliation Clinician Type	Month	Day	Year
<input type="text" value="Nurse"/>	<input type="text" value="06"/>	<input type="text" value="20"/>	<input type="text" value="2021"/>
Medication Reconciliation Clinician Name			
<input type="text" value="Nurse Wilson"/>			

Enter Mineral Metabolism

Review and enter Mineral Metabolism data, if applicable.

Mineral Metabolism			
Phosphorus (mg/dL) *	Month	Day	Year
<input type="text" value="6.1"/>	<input type="text" value="07"/>	<input type="text" value="06"/>	<input type="text" value="2022"/>
<input type="checkbox"/> N/A			
Phosphorus Method			
<input type="text" value="Plasma"/>			
Uncorrected Calcium (mg/dL) *	Month	Day	Year
<input type="text" value="10.1"/>	<input type="text" value="07"/>	<input type="text" value="06"/>	<input type="text" value="2022"/>
<input type="checkbox"/> N/A			
Corrected Calcium (mg/dL) *	Month	Day	Year
<input type="text" value="9.3"/>	<input type="text" value="07"/>	<input type="text" value="06"/>	<input type="text" value="2022"/>
<input type="checkbox"/> N/A			
Serum Albumin (g/dL) *	Month	Day	Year
<input type="text" value="3.0"/>	<input type="text" value="07"/>	<input type="text" value="06"/>	<input type="text" value="2022"/>
<input type="checkbox"/> N/A			
Serum Albumin Lower Limit (g/dL)			
<input type="text"/>			<input checked="" type="checkbox"/> N/A
Serum Albumin Lab Method			
<input type="text" value="BCG"/>			<input type="checkbox"/> N/A
Parathyroid Hormone (PTH) Value (pg/mL)	Month	Day	Year
<input type="text" value="306"/>	<input type="text" value="07"/>	<input type="text" value="06"/>	<input type="text" value="2022"/>
<input type="checkbox"/> N/A			
Parathyroid Hormone (PTH) Method			
<input type="text" value="Plasma"/>			
Parathyroid Hormone (PTH) Upper Limit Assay Range (pg/mL)			
<input type="text"/>			<input checked="" type="checkbox"/> N/A

Erythropoietin Stimulating Agents (ESA)

Review and provide ESA data, as needed.

ESA Date = Date of the most recent prescription

ESA Monthly Dose:

- In-center Patients = Amount administered
- Home Patients = Amount prescribed

ESA

ESA Administered *	Month	Day	Year	<input type="checkbox"/> N/A
Yes	06	20	2021	
ESA Agent Prescribed *				<input type="checkbox"/> N/A
Epoetin Beta				
Other ESA Agent Prescribed				
ESA Monthly Dose *				<input type="checkbox"/> N/A
15,000			Units	
Other ESA Monthly Dose Measure				
ESA Route	Select one route			
SC (Subcutaneous)				

Add Infection

Review and **Add** Infection data, as needed.

Infection

No Infection Data Available ■ N/A [Help](#)

Infection ID	Infection Requires Hospitalization	Infection Hospitalization Date	Edit	Delete
31000057352	Infection does not require hospitalization	N/A		
31000057351	Infection requires hospitalization	04/04/2021		

Infection ID: Not Yet Assigned

Infection Requires Hospitalization *

Month Day Year

N/A

Add

Enter Iron

Review and enter Iron data, if applicable.

Iron Date = Date of the most recent prescription

Iron Dose:

- In-center Patients = Amount administered
- Home Patients = Amount prescribed

Iron				
Intravenous (IV) Iron Administered *	Month	Day	Year	
Yes	MM	DD	YYYY	<input type="checkbox"/> N/A
Intravenous (IV) Iron *				<input type="checkbox"/> N/A
Other Intravenous (IV) Iron				
Intravenous (IV) Iron Dose *				
5000			mg	<input type="checkbox"/> N/A
Other Intravenous (IV) Iron Dose Measure				
Oral (PO) Iron Prescribed *	Month	Day	Year	
Oral Iron Prescribed	MM	DD	YYYY	<input type="checkbox"/> N/A
Oral (PO) Iron *				<input type="checkbox"/> N/A
Ferrous Fumarate				
Other Oral (PO) Iron				
Oral (PO) Iron Dose *				
5000			mg	<input type="checkbox"/> N/A
Other Oral (PO) Iron Dose Measure				

Enter Fluid Weight Management

Review and enter Fluid Weight Management data, if applicable.

Fluid Weight Management				
Post-Dialysis Target Weight for Session *	Month	Day	Year	
Was Prescribed	08	26	2020	<input type="checkbox"/> N/A

Enter Hospitalization

Review and click **Add** to enter Hospitalization data, if applicable.

Hospitalization

No Hospitalization Data Available N/A [Help](#)

Hospitalization ID	Admission Date	All Hospital Visits	Name of Hospital	Discharge Date	Edit	Delete
31000058020	04/25/2021	Emergency Room (ER) Visit	ABC Hospital	04/30/2021		

Hospitalization ID: Not Yet Assigned

Admission Date *

Month Day Year N/A

All Hospital Visits *

N/A

Discharge Date *

Month Day Year N/A

Name of Hospital *

N/A

Add

Enter Telemedicine

Review and enter Telemedicine Information, as needed.

Telemedicine

Telemedicine

Yes

Yes

No

Number of Telemedicine Visits

Telemedicine

Telemedicine

Yes

Number of Telemedicine Visits

2

Last Telemedicine Visit

Month

Day

Year

10

25

2021

Save

Reset

Submit

Delete

Successful Submission

EQRS displays the “**Successfully submitted clinical data**” message.

Manage Patient Clinical Values Help

Successful
Successfully submitted clinical data.

Patient Search

ABC DIALYSIS

Collection Type * **Clinical Month *** **Last Name Group** **Patient Clinical Status**

Hemodialysis August 2020 (Open)

Select Patient

Search Patients Patient, Itsa (3100008572)

EQRS Patient ID	Patient Name	Date of Birth	Medicare Beneficiary Identifier
3100008572	Itsa Patient	01/01/1960	

No Clinical Data Available for All Collection Types

Save **Reset** **Submit** **Delete**

Vascular Access: Patient Search

Search for the desired patient by clicking **Search Patients**.

Manage Patient Clinical Values Help

i Info
No clinical data for selected facility, patient, and clinical month.

Patient Search

ABC DIALYSIS

Collection Type * Clinical Month * Last Name Group Patient Clinical Status

Vascular Access June 2021 (Open)

Search Patients Select Patient

Eight, Patient (3100020535)

EQRS Patient ID	Patient Name	Date of Birth	Medicare Beneficiary Identifier
3100020535	Patient Eight	03/15/1960	

No Clinical Data Available for All Collection Types

Save Reset Submit Delete

Vascular Access: Indicate Access

Review and enter Vascular Access data, if applicable and then click **Submit**.

Vascular Access

Date of Reported Dialysis Session *
Month: 04 Day: 30 Year: 2021 N/A

Current Access Type *
Catheter Only

Date Access Type Changed *
Month: 04 Day: 30 Year: 2021

AV Fistula Usable Date
Month: MM Day: DD Year: YYYY N/A

AV Fistula Maturing
Yes N/A

AV Fistula State
Created N/A

AV Fistula Creation Date
Month: 04 Day: 18 Year: 2021 N/A

AV Graft Maturing
No N/A


AV Graft State
Not yet present N/A

Save Reset **Submit** Delete

Vascular Access: Submission

EQRS displays the “**Successfully submitted clinical data**” message.

Manage Patient Clinical Values [Help](#)

 **Successful**
Successfully submitted clinical data.

Patient Search

ABC DIALYSIS

Collection Type * Clinical Month * Last Name Group Patient Clinical Status

Select Patient

EQRS Patient ID	Patient Name	Date of Birth	Medicare Beneficiary Identifier
3100008572	Itsa Patient	01/01/1960	

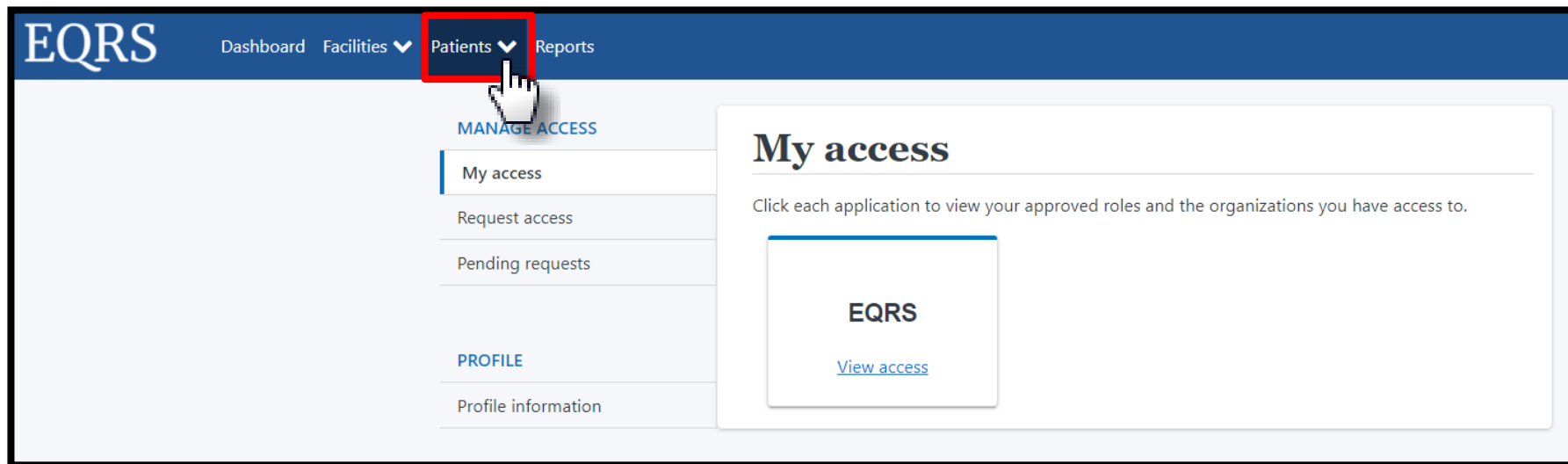
No Clinical Data Available for All Collection Types



Enter Clinical Depression Data

Form Signed: Click Patients

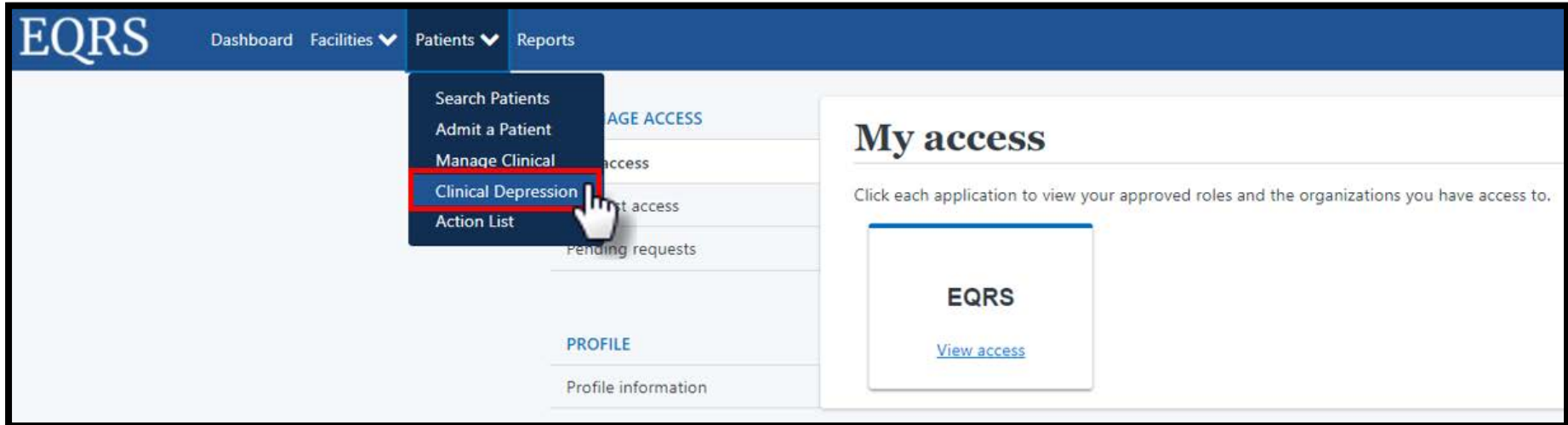
Click **Patients** in the navigation menu.



The screenshot shows the EQRS application interface. The top navigation bar is dark blue and contains the EQRS logo on the left and the following menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow and a red box around it), and Reports. A mouse cursor is pointing at the Patients menu item. Below the navigation bar, the 'MANAGE ACCESS' section is visible, containing links for My access, Request access, and Pending requests. The 'PROFILE' section contains a link for Profile information. On the right side of the page, there is a 'My access' section with a heading, a sub-heading, and a list of applications. The first application is 'EQRS' with a 'View access' link below it.

Click Clinical Depression

Click **Clinical Depression** in the Patients sub-menu.



Depression Screening: Select Status

Select the **Depression screening status** options:

- All
- Required
- Submitted

Clinical Depression Screening and Follow-Up Reporting [Help](#)

FACILITY

Facility CCN, NPI, and name: (123456 1234561235) ABC DIALYSIS

Assessment period: 01/01/2021 - 12/31/2021

PATIENT [Facility history](#)

Depression screening status: **Required** (dropdown menu)

Patient name search:

	Screening status	Last updated	Actions
3100008232	Required		Report
3100008229	Required		Report
3100008230	Required		Report
3100008230	Required		Report

Click Report

Review the list and click **Report** for the desired patient.

Clinical Depression Screening and Follow-Up Reporting [Help](#)

FACILITY

Facility CCN, NPI, and name: (123456 1234561235) ABC DIALYSIS Assessment period: 01/01/2021 - 12/31/2021

PATIENT [Facility history](#)

Depression screening status: Required Patient name search:

UPI	Patient name	Screening status	Last updated	Actions
3100008231	Man, Iron	Required		Report
3100008232	Man, Spider	Required		Report
3100008229	Marvel, Captain	Required		Report
3100008230	Panther, Black	Required		Report

Submit Clinical Depression

Review the Clinical Depression options, make the necessary selection, and click **Submit**.

Clinical Depression Screening and Follow-Up Reporting for Man, Spider

In order to comply with QIP requirements, you must submit Clinical Depression Screening and Follow-Up Plan information for each eligible patient at least once during the calendar year.

The assessment periods are from 1/1 to 12/31 of each calendar year. Users can enter data during the entire assessment period and are given two months past the end of the assessment period 2/28 to complete their reporting. On 3/1 the previous year's assessment period closes and the reported values become read-only.

- Only required to be submitted for patients age 12 or older
- Only required to be submitted for patients treated at the facility for 90 days or longer
- Only required of facilities with at least 11 eligible patients during the assessment period selected
- Only required of facilities with a CCN open date prior to April 1 of the assessment year selected

Please select one of the following options describing the clinical depression screening and (when necessary) the follow up plan documented for the patient.

- Screening for clinical depression is documented as being positive, and a follow-up plan is documented[?]
- Screening for clinical depression documented as positive, and a follow-up plan not documented, and the facility possess documentation stating the patient is not eligible[?]
- Screening for clinical depression documented as positive, the facility possesses no documentation of a follow-up plan, and no reason is given[?]
- Screening for clinical depression is documented as negative, and a follow-up plan is not required
- Screening for clinical depression not documented, but the facility possesses documentation stating the patient is not eligible[?]
- Clinical depression screening not documented, and no reason is given

Cancel

Submit



Successful Submission

EQRS displays a time stamp of the Clinical Depression Screening that was submitted and displays the “**Clinical depression assessment reported successfully**” message.

 **Clinical depression assessment reported successfully**
Review your report by viewing "Submitted" and using patient search to locate the record.

Clinical Depression Screening and Follow-Up Reporting [? Help](#)

FACILITY

Facility CCN, NPI, and name: (123456 1234567890) ABC DIALYSIS Assessment period: 01/01/2021 - 12/31/2021

PATIENT [Facility history](#)

Depression screening status: Patient name search:

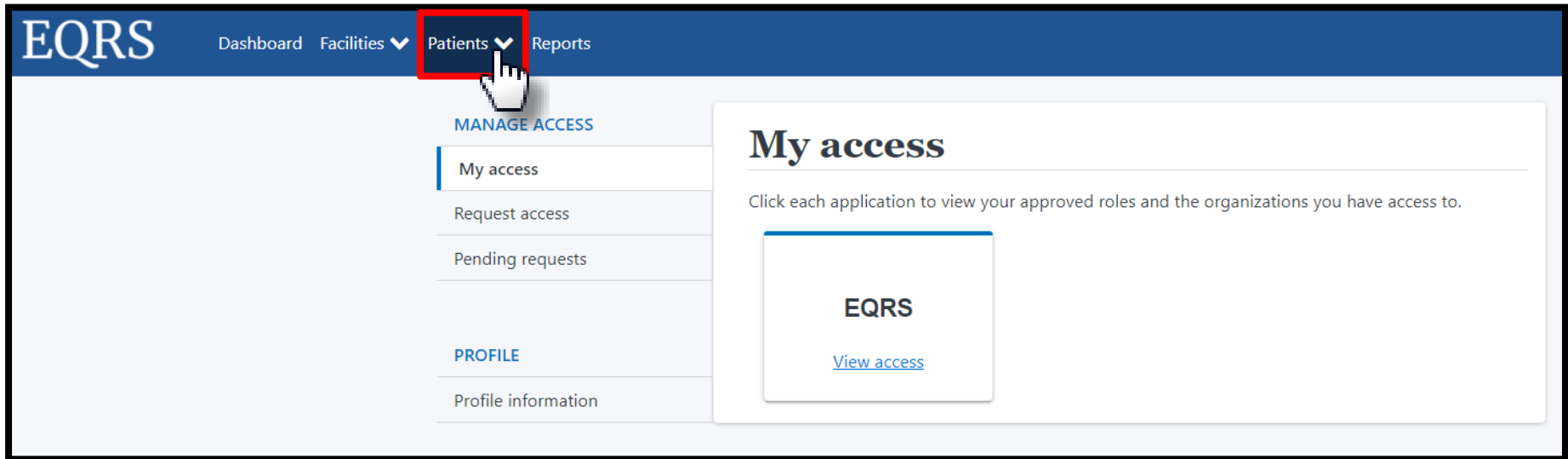
UPI	Patient name	Screening status	Last updated	Actions
3100008231	Man, Iron	Required		Report
3100008232	Man, Spider	Submitted	06/28/2021, 5:40 pm	Report



Discharge a Patient

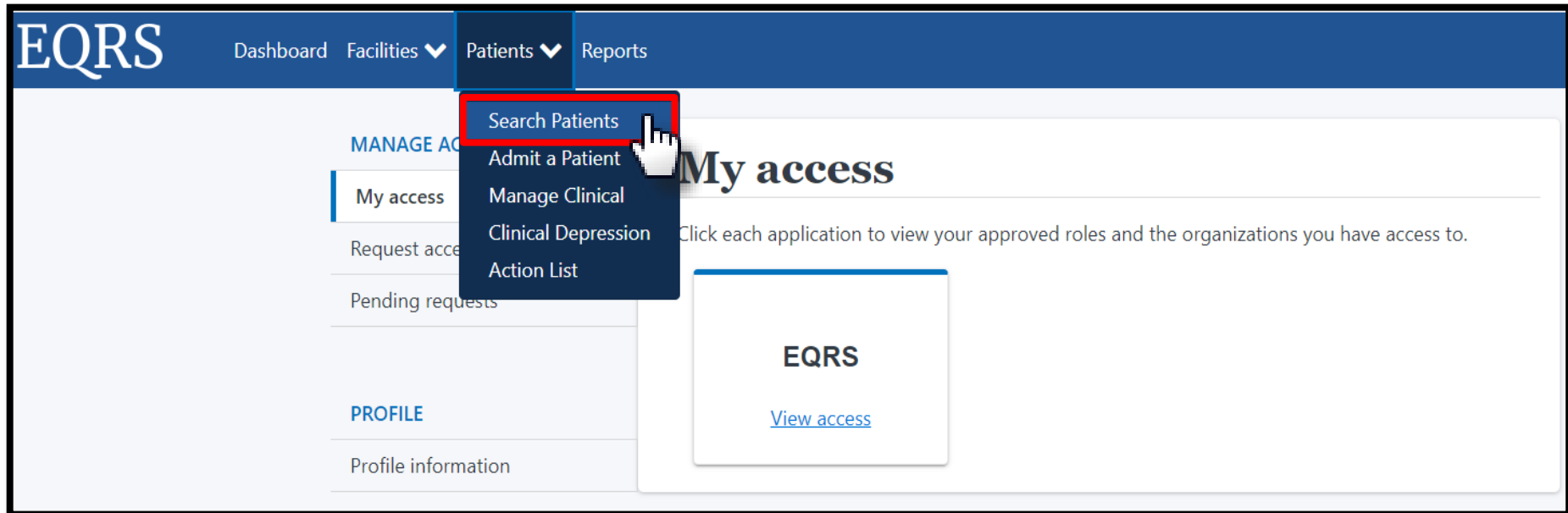
Click Patients

Click **Patients** in the navigation menu.



Click Search Patients

Click **Search Patients** in the Patients sub-menu.



Enter Search Criteria

Enter search criteria to locate patient. Click Submit.

Search Patients

Use the criteria below to search for a patient. [? Help](#)

SEARCH

Patient criteria

Patient's First Name

Patient's Last Name

Medicare Beneficiary Identifier

Social Security Number

HICNUM

EQRS Patient ID (aka CROWN UPI)

SIMS UPI

Gender

Criteria [Clear all](#)

Patient's First Name

- ✖ Patient

Patient's Last Name

- ✖ One

Admitted Facility

ABC DIALYSIS

Click EQRS Patient ID

Click the **EQRS Patient ID (aka CROWN UPI)**.

Search Patient Results ? Help

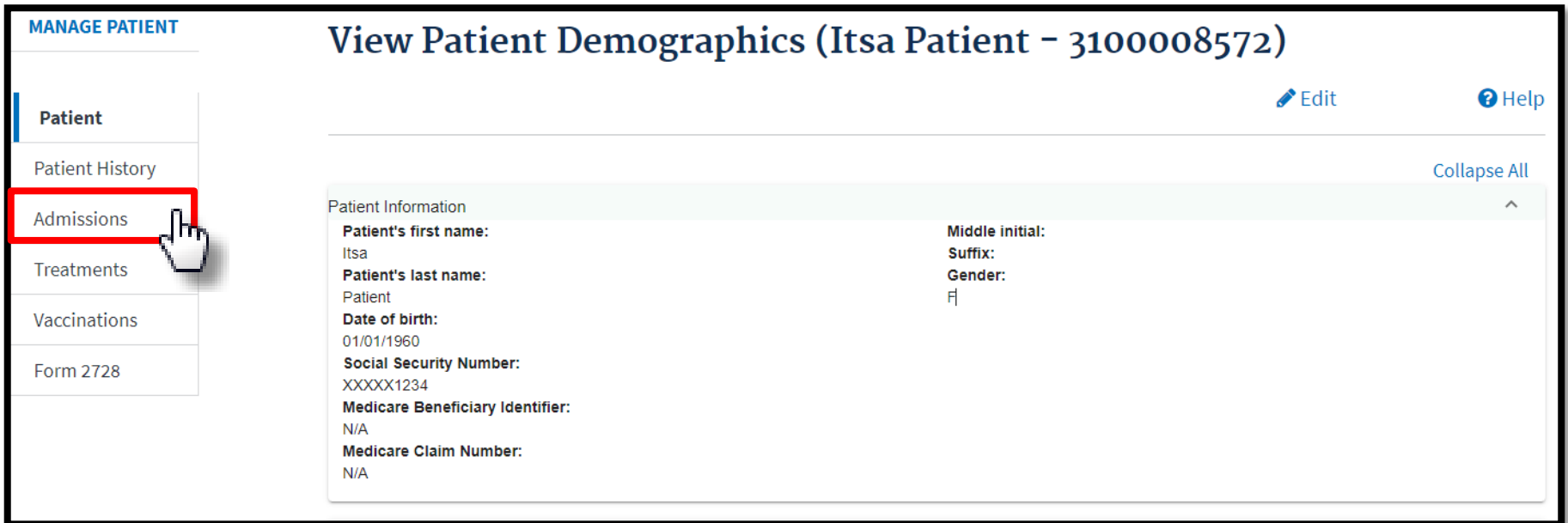
[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

Showing 1 to 1 of 1 results Page Size: 10 << Prev 1 Next >>

Click Admission

View the patient's demographics and click the Admissions link.



The screenshot shows a web application interface for managing a patient. On the left is a sidebar titled 'MANAGE PATIENT' with a list of menu items: 'Patient', 'Patient History', 'Admissions', 'Treatments', 'Vaccinations', and 'Form 2728'. The 'Admissions' item is highlighted with a red rectangular box, and a mouse cursor is pointing at it. The main content area is titled 'View Patient Demographics (Itsa Patient - 3100008572)'. In the top right of this area are 'Edit' and 'Help' buttons. Below the title is a 'Collapse All' link. The main content displays 'Patient Information' with the following details:

Patient's first name: Itsa	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1960	Gender: F
Social Security Number: XXXXX1234	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Click Admit Date

Click the **Admit Date** link.

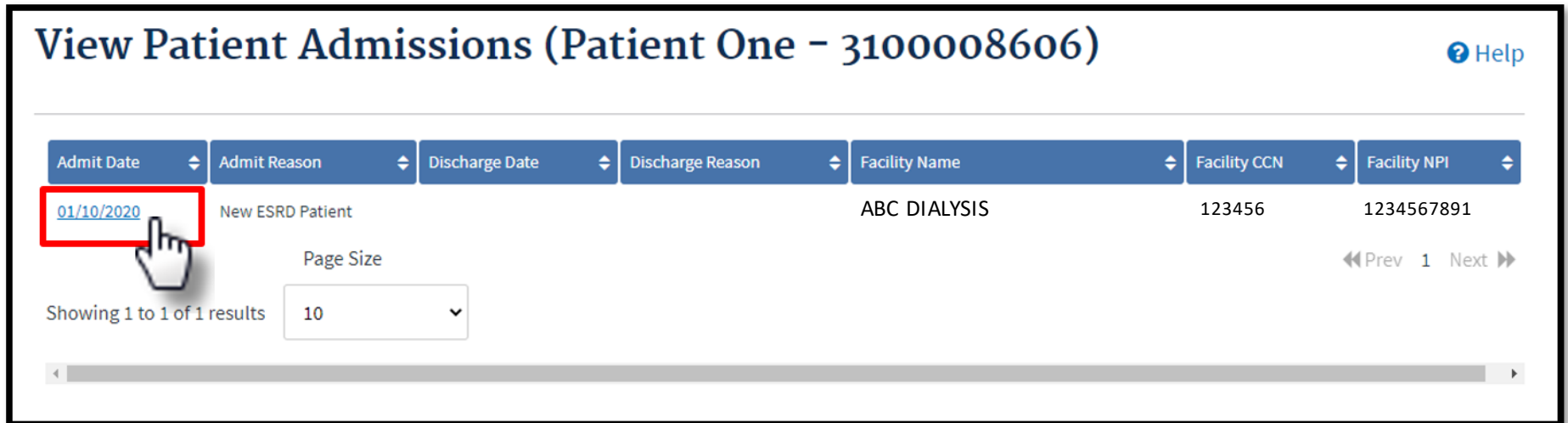
View Patient Admissions (Patient One - 3100008606) [Help](#)

Admit Date	Admit Reason	Discharge Date	Discharge Reason	Facility Name	Facility CCN	Facility NPI
01/10/2020	New ESRD Patient			ABC DIALYSIS	123456	1234567891

Page Size: 10

Showing 1 to 1 of 1 results

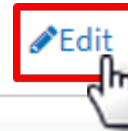
◀ Prev 1 Next ▶



Click Edit

Review the Admission Information and click the **Edit** link.

View Admission Information (01/10/2020)



Delete

Help

Admission information

Admit date: 01/10/2020	Admit reason: New ESRD Patient	Submit date: 09/10/2020
Facility CCN: 123456	Facility NPI: 1234567891	Facility name: ABC DIALYSIS
Discharge date: N/A	Discharge reason: N/A	Transfer discharge subcategory: N/A

Successful Submission

EQRS displays the “Admission record update successful” message.

View Patient Admissions (Patient One - 3100008606) [Help](#)

Admit Date	Admit Reason	Discharge Date	Discharge Reason	Facility Name	Facility CCN	Facility NPI
01/10/2020	New ESRD Patient	09/02/2020	Discontinue	ABC DIALYSIS		

Page Size: 10 (Showing 1 to 1 of 1 results) [Prev](#) 1 [Next](#)

 **Successful**
Admission record update successful.

View Admission Information (01/10/2020) [Edit](#) [Delete](#) [Help](#)

Admission information ^

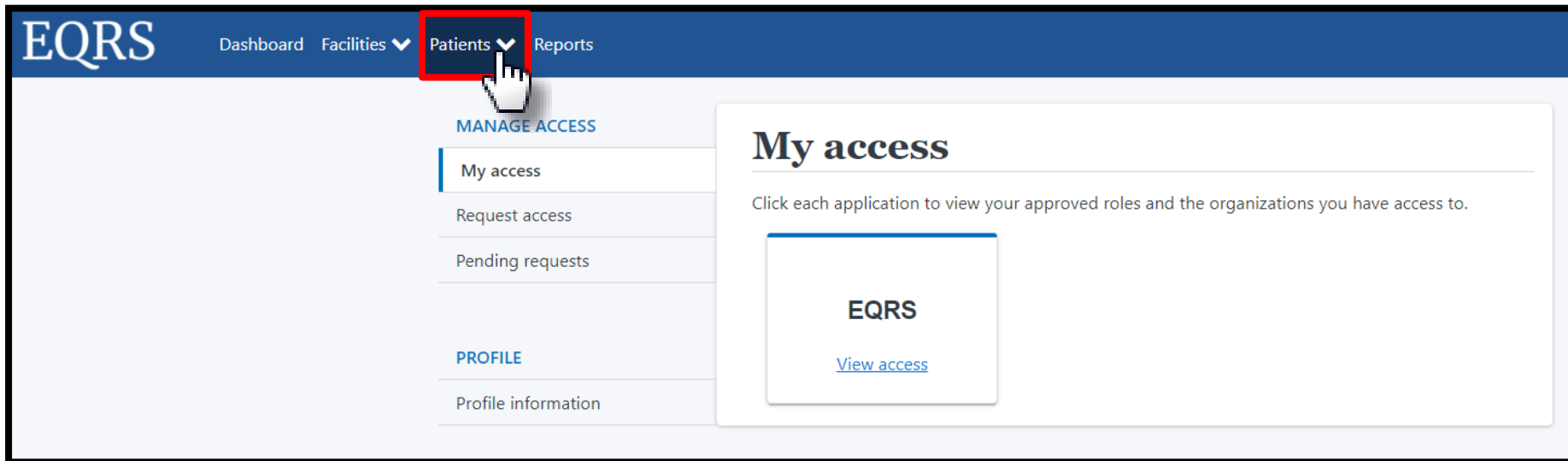
Admit date: 01/10/2020	Admit reason: New ESRD Patient	Submit date: 09/10/2020
Facility CCN: 123456	Facility NPI: 1234567891	Facility name: ABC DIALYSIS
Discharge date: 09/02/2020	Discharge reason: Discontinue	Transfer discharge subcategory: N/A



Complete a CMS-2746 Form

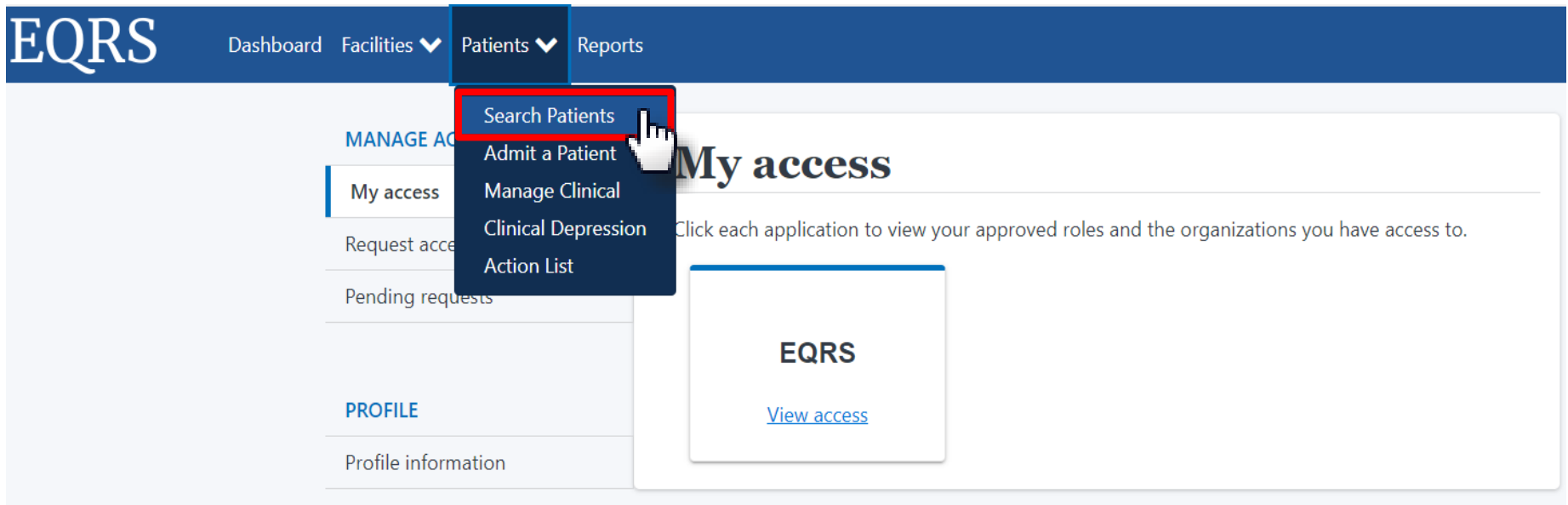
Click Patients

Click **Patients** in the navigation menu.



Click Search Patients

Click **Search Patients** in the Patients sub-menu.



The screenshot displays the EQRS web application interface. At the top, a dark blue navigation bar contains the EQRS logo on the left and menu items: Dashboard, Facilities (with a dropdown arrow), Patients (with a dropdown arrow), and Reports. Below this, a light blue sidebar menu is visible, with 'MANAGE ACCOUNT' as a section header. Under this section, 'My access' is highlighted with a blue bar. Other items in the sidebar include 'Request access', 'Pending requests', 'PROFILE', and 'Profile information'. A dark blue dropdown menu is open under the 'Patients' menu item, listing 'Search Patients', 'Admit a Patient', 'Manage Clinical', 'Clinical Depression', and 'Action List'. A white mouse cursor is pointing at the 'Search Patients' option, which is also highlighted with a red rectangular box. The main content area on the right shows a 'My access' section with a heading and a sub-heading 'Click each application to view your approved roles and the organizations you have access to.' Below this, there is a white box containing the EQRS logo and a blue link labeled 'View access'.

Enter Search Criteria

Enter search criteria to locate patient. Click Submit.

Search Patients

Use the criteria below to search for a patient. [Help](#)

SEARCH

Patient criteria

Patient's First Name

Patient's Last Name

Medicare Beneficiary Identifier

Social Security Number

HICNUM

EQRS Patient ID (aka CROWN UPI)

SIMS UPI

Gender

Criteria [Clear all](#)

Patient's First Name
✘ Ima

Patient's Last Name
✘ Patient

Admitted Facility
ABC DIALYSIS

Submit

Click EQRS Patient ID

Click the **EQRS Patient ID (aka CROWN UPI)**.

Search Patient Results ? Help

[Back to Search](#)

EQRS Patient ID (aka CROWN UPI)	First Name	Middle Initial	Last Name	Gender	Date of Birth	Date of Death	Social Security Number	HICNUM	Medicare Beneficiary Identifier	SIMS UPI
3100008572	Itsa		Patient	F	01/01/1960		XXXXX1234	N/A	N/A	

Showing 1 to 1 of 1 results Page Size: 10 << Prev 1 Next >>

Click Edit

View the patient's demographics and click the **Edit** link.

View Patient Demographics (Ima Patient - 3100008545)

[Edit](#) [Help](#)

[Collapse All](#)

Patient Information ^

Patient's first name: Ima	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1950	Gender: M
Social Security Number: XXXXX6789	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Click Medical Information

Expand the Medical Information section to enter the death information.

Edit Patient (Ima Patient - 3100008545) [Help](#)

Complete the sections below to edit a patient in EQRS. [Expand All](#)

Patient Information ^


Patient's first name *	Middle initial
<input type="text" value="Ima"/>	<input type="text"/>
Patient's last name *	Suffix
<input type="text" value="Patient"/>	<input type="text" value=""/>

Ethnicity, race, tribe and origin v

Contact Information v

Miscellaneous Information v

Medical Information v



[Cancel](#) [Submit](#)

Click Submit

Indicate the date and cause of death. Click **Submit**.

Medical Information ^

Effective date *

Month Day Year

01 01 2010

Death date

Month Day Year

09 09 2020

Death code description

Hypoglycemia ▾

Death code

100

Cancel Submit

Click Form 2746

EQRS displays **Successfully edited patient** message.
Next click the **Form 2746** link.

The screenshot displays the 'MANAGE PATIENT' interface. On the left, a sidebar menu lists various options: Patient, Patient History, Admissions, Treatments, Vaccinations, Form 2728, and Form 2746. The 'Form 2746' option is highlighted with a red box and a hand cursor. The main content area features a green success message: 'Successful Successfully edited patient.' Below this, the title 'View Patient Demographics (Ima Patient - 3100008545)' is shown, along with 'Edit' and 'Help' buttons. A 'Collapse All' link is also present. The patient information is displayed in a table format:

Patient Information	
Patient's first name: Ima	Middle initial:
Patient's last name: Patient	Suffix:
Date of birth: 01/01/1950	Gender: M
Social Security Number: XXXXX6789	
Medicare Beneficiary Identifier: N/A	
Medicare Claim Number: N/A	

Indicate Key Patient Info

Review the form and indicate Key Patient Info, as needed.

Add a Death Notice (2746)

[? Help](#)
OMB CONTROL NUMBER 0938-0448 Expires 11/30/2022

[Collapse All](#)

Key Patient Info - 3100008545 ^

(1a) Patient's Last Name Patient	(1b) First Name Ima	(1c) MI
(2) Patient's Sex Male	(3) Date of Birth 01/01/1950	(4) Medicare Beneficiary Identifier or Social Security Number XXX-XX-6789
(5) Patient State of Residence FL	(6) *Place of Death Home	(7) Date of Death 09/09/2020
(8) Modality at Time of Death Incenter Hemodialysis		
(9) Provider Name and Address (a) ABC DIALYSIS (b) Address Line 1: (c) Address Line 2: (d) Zip Code: (e) City: (f) State:		(10) Provider Number 123456

Review Cause of Death

Review the Cause of Death and indicate any Secondary Causes, as needed.

Cause of Death ^

(11) Cause of Death

(a) Primary Cause:
100: Hypoglycemia

(b)* Were there secondary causes?

No ▼

If Yes, specify:

<input type="text"/>	<input type="text" value="▼"/>
<input type="text"/>	<input type="text" value="▼"/>
<input type="text"/>	<input type="text" value="▼"/>
<input type="text"/>	<input type="text" value="▼"/>

(c) If cause is other (98), please specify:

Indicate Renal Replacement Therapy

Review and complete the Renal Replacement Therapy section, as needed.

Renal Replacement Therapy ^

(12) *Renal replacement therapy discontinued prior to death:

(a) If yes, check one of the following :

(b) Date of last dialysis treatment

Month	Day	Year
09	02	2020

(13) *Was discontinuation of renal replacement therapy after patient/family request to stop dialysis ?

Yes

No

Unknown

Not Applicable

Indicate Transplant and Hospice Care

Review and complete the Transplant and Hospice section, as needed.

Transplant and Hospice ^

(14) If deceased ever received a transplant

(a) Date of most recent transplant

Month Day Year

Unknown

(b) Type of transplant received

Living Related

Living Unrelated

Deceased

Unknown

(c) Was graft functioning(patient not on dialysis) at time of death?

Yes

No

Unknown

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

Yes

No

Unknown

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

Yes

No

Unknown


Click Submit

Complete the Physician section and click **Submit**.

Physician		
(16) *Name of Physician Nick Fury	(a) Physician UPIN	(b) Physician NPI 1780762971
(17) *Person completing this form Meredith Grey	*Date Month: 09 Day: 09 Year: 2020	
Form Information		
Form Entered Date: 09/10/2020	Network Number: 10	
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Reset"/>		

Successful Submission

EQRS displays “Successfully submitted form 2746” message.

 **Successful**
Successfully submitted form 2746.

View a Death Notice (2746) - Submitted

[Print](#) [Help](#)

OMB CONTROL NUMBER 0938-0448 Expires 11/30/2022

Key Patient Info - 310008545

(1a) Patient's Last Name Patient	(1b) First Name Ima	(1c) MI
(2) Gender Male	(3) Date of Birth 01/01/1950	(4) Medicare Beneficiary Identifier or Social Security Number XXX-XX-6789
(5) Patient State of Residence FL	(6) Place of Death Home	(7) Date of Death 09/09/2020
(8) Modality at Time of Death Incenter Hemodialysis		
(9) Provider Name and Address (a) (b) Address Line 1: (c) Address Line 2: (d) Zip Code: (e) City: (f) State: ...		(10) Provider Number 123456



Resolve Accretions

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 EQRS.

Accepting an accretion walks you through admitting the patient to your facility in EQRS.

What Does Each Action Do?

You can take the following actions on accretions:

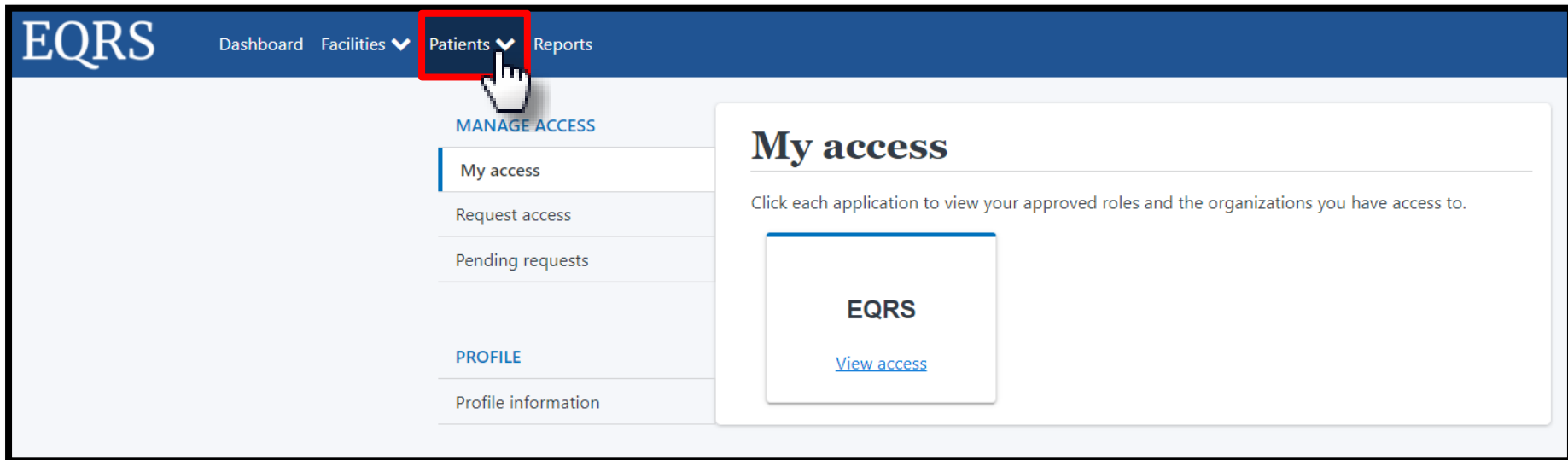
ACCEPT – You agree with the external source and will admit the patient to your facility in EQRS.

INVESTIGATE – This informs other users that the accretion is “under investigation” by you.

ESCALATE TO NETWORK – The patient is not in your facility. This option escalates the accretion to your network so they can reassign it to the correct facility.

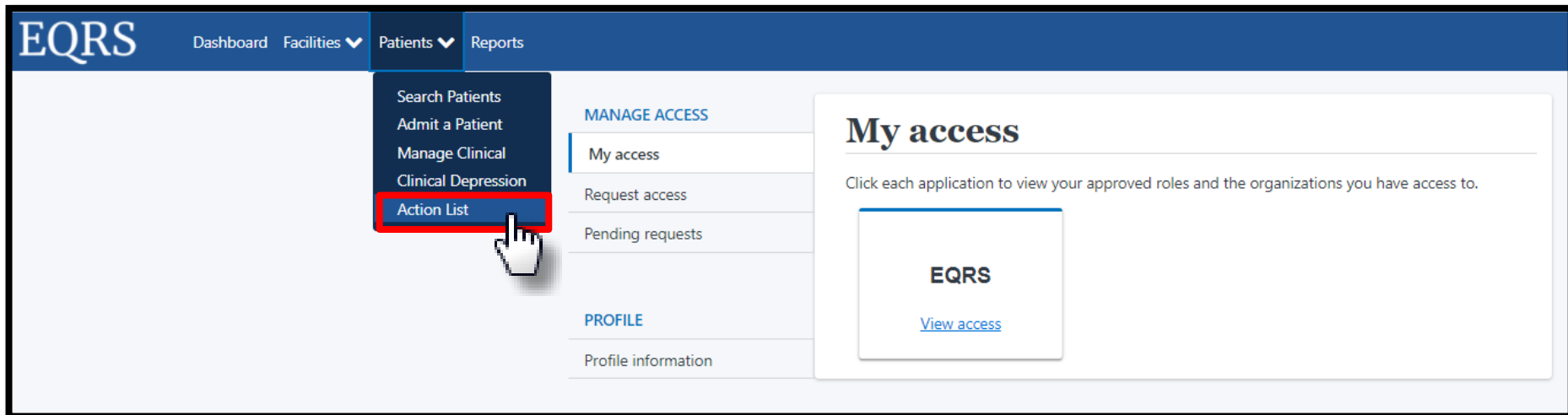
Click Patients

Click **Patients** in the navigation menu.



Click Action List

Click **Action List** in the Patients sub-menu.



Enter Filter Actions

Enter Action Status and click **Filter**.

Action List - 5 Records Found

Filter Actions

Action Type *

Accretion ▼

Action Status *

New

Under Investigation


Escalated

Reassigned

Assigned To *

ABC DIALYSIS S

Clear Filter **Filter**



Click Accretion Link

Click the **Accretion link** in the Action Type section.

Action List ^

Below is a list of notifications and accretions that match your filters. You may adjust your filters as much as you need.

Action Type	Assigned To	Days Open
Accretion: Patient ABC SSN:XXX-XX-4506	ABC Dialysis	10
Accretion: Patient ABC SSN:XXX-XX-2908	ABC Dialysis	10
Accretion: Patient ABC SSN:XXX-XX-5204	ABC Dialysis	10
Accretion: Patient ABC SSN:XXX-XX-7802	ABC Dialysis	10
Accretion: Patient ABC SSN:XXX-XX-2109	ABC Dialysis	10

Page Size 10 ▼

Showing 1 to 5 of 5 results

◀ Prev 1 Next ▶

View Accretion

Click the accordion to view accretion information.

View Accretion Help

Accretion Details ∨

Key Patient Information ∧

First Name:
Last Name:

Gender: Female
Date of Birth: 11/21/1942

State:
Zip Code: 34655

Social Security Number: XXX-XX-4506
Medicare Claim Number: 0XXXXX506A
Medicare Beneficiary Identifier:

Facility & Treatment Information ∨

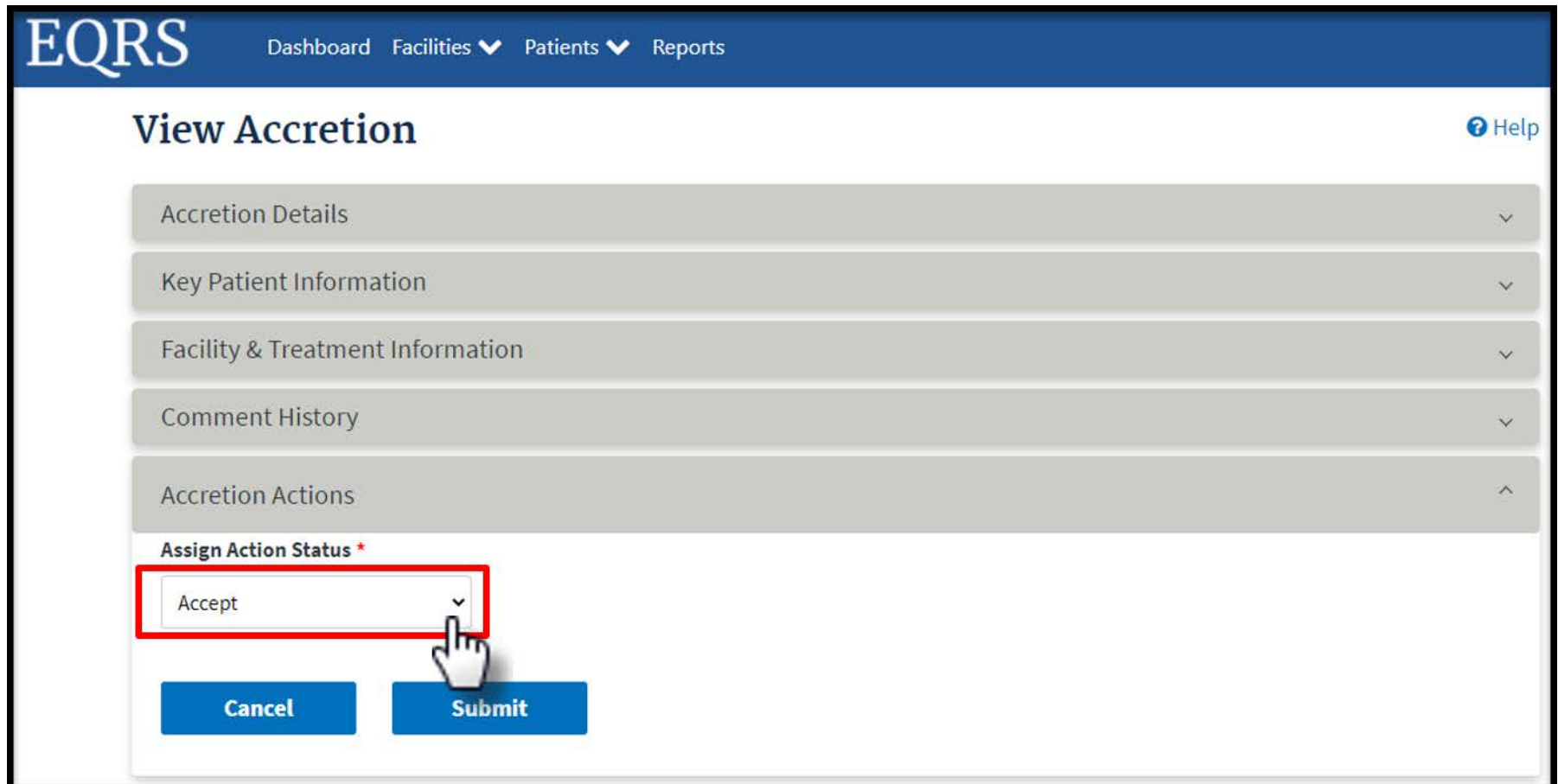
Comment History ∨

Accretion Actions ∧

Assign Action Status *

Accretion Accepted

Select **Accept** under the Assign Action Status to accept accretion.



The screenshot displays the EQRS 'View Accretion' page. The top navigation bar includes 'EQRS', 'Dashboard', 'Facilities', 'Patients', and 'Reports'. The main content area is titled 'View Accretion' and features a 'Help' icon. Below the title are several expandable sections: 'Accretion Details', 'Key Patient Information', 'Facility & Treatment Information', 'Comment History', and 'Accretion Actions'. The 'Accretion Actions' section is expanded, showing a dropdown menu for 'Assign Action Status *'. The 'Accept' option is selected and highlighted with a red border. A hand cursor is positioned over the dropdown arrow. Below the dropdown are two buttons: 'Cancel' and 'Submit'.

Submit Accretion

Click the **Submit** button to submit accretion.

The screenshot shows the EQRS 'View Accretion' page. The top navigation bar includes 'EQRS', 'Dashboard', 'Facilities', 'Patients', and 'Reports'. The main content area is titled 'View Accretion' and features a 'Help' icon. Below the title are several expandable sections: 'Accretion Details', 'Key Patient Information', 'Facility & Treatment Information', 'Comment History', and 'Accretion Actions'. Under the 'Accretion Actions' section, there is a dropdown menu labeled 'Assign Action Status *' with 'Accept' selected. At the bottom of the page, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red rectangular border, and a hand cursor is pointing at it.

Accretion: Admit Patient

Complete the patient admission process.

i Accretion under investigation

Admit Patient [Help](#)

Complete the sections below to admit a patient in EQRS. [Expand All](#)

Patient Information

Patient's first name *	Middle initial
<input type="text"/>	<input type="text"/>
Patient's last name *	Suffix
<input type="text"/>	<input type="text"/>
Date of birth *	Gender *
Month Day Year	<input type="text"/>
<input type="text"/> 11 <input type="text"/> 21 <input type="text"/> 1942	Female
Social Security Number *	<input type="checkbox"/> N/A
<input type="text"/>	
Medicare Beneficiary Identifier *	<input type="checkbox"/> N/A
<input type="text"/>	



Resources and Evaluation

Font size: [A](#) [A](#) [A](#)

Input search criteria

Search

Sign Up for Mailing List

Enter your information below to receive updates on system trainings, project information, and monthly newsletters!

Enter your email

First name

Last name

Company

Subscribe

powered by [MailMunch](#)

ESRD Systems Data Management Guidelines

ESRD Systems Data Management Guidelines PDF.



Important Links

- [HARP Training Materials](#)
- [ESRD QIP UI Quick Start Guide](#)
- [ESRD Systems Data Management Guidelines](#)

Learn About EQRS

MyCROWNWeb.org provides a number of tools to help the ESRD community become better users of the EQRS system. Please visit the pages and quick links on the website for more information on the End Stage Renal Disease (ESRD) Quality Reporting System (EQRS). Please check out the [Latest Official News from CMS](#) and [Event Announcements](#) for more latest news.



Information

MyCROWNWeb.org features extensive information on EQRS. [Events](#) provides recorded presentations from recent Town Halls, describing the evolution of EQRS. [News](#) provides the latest news from CMS on ESRD and EQRS, and provides links to monthly

Education tab

[Home](#)[Events](#)[Education](#)[News](#)

Font size: [A](#) [A](#) [A](#)

Input search criteria

Search

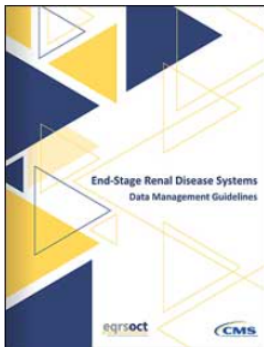
Educational Resources Navigation

[EQRS Minimum Computer Specifications](#)

[Virtual Training Calendar](#)

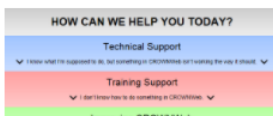
ESRD Systems Data Management Guidelines

ESRD Systems Data Management Guidelines [PDF](#).



Online Help Portal

Visit the EQRS Help Portal to ask your questions directly to the Help Desk or the EOCT staff.



Educational Resources



EQRS Educational Resources

MyCROWNWeb offers many different training and educational tools to help new and experienced users of EQRS. Please visit the pages listed below to find the best educational resources for you:



[Virtual Training Calendar](#)

EQRS Resources:

- ★ [EQRS Data Submission Stopwatch](#)
- ★ [EQRS Quick Start Guide](#)
- ★ [Form \(2728, 2746\) Modifications Process Update](#)
- ★ [EQRS: Patient Admit/Discharge Guidance](#)
- ★ [EQRS Minimum Computer Specifications](#)
- ★ [CMS-2744 Annual Facility Survey Training](#)

HARP Training

- ★ [HARP Training](#)
- ★ [HARP Training Recording](#)
Revised on: 04/02/2020
- ★ [HARP Training PDF](#)
Revised on: 04/02/2020
- ★ [HARP Quick Start Guide](#)
Revised on: 04/02/2020

ESRD Quality Incentive Program:



The new End-Stage Renal Disease Quality Incentive Program (ESRD) Facility User Quick Start Guide is now available in [PDF](#).

- [ESRD QIP Training Slides](#)
- [ESRD QIP System Preview Period Training Video](#)