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Add an Initial CMS-2728 Form

1   Log in to EQRS.

2   Click **Patients**.

3   Click **Search Patients**. The *Search Patients* screen displays.

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

5   Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6   Click **Form 2728**. The *Manage Form 2728* screen displays.

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

8   Enter/verify the required information in Sections A, C, and E. Select the GFR Calculation Method in Section F, then click **Save**. The message **"Successfully saved Form 2728"** displays.

9   Click **Print**. The report viewer displays the CMS-2728 Form in a PDF format.

10 Click the **Printer icon**; enter any print parameters and click **OK**.

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

12 Go back to EQRS to complete the CMS-2728 Form; repeat **Steps 1-6**.

13 Click the **Initial Transplant+** link in the Existing 2728 Forms column. The *View ESRD Medical Evidence (2728) – Saved* screen displays.

14 Click **Edit**; the *Edit an ESRD Medical Evidence (2728) – Saved* screen displays.

15 In Sections E-F, enter the dates the attending physician and patient signed the form, and click **Submit**.

16 The *View ESRD Medical Evidence (2728) – Submitted* screen displays with the message **"Successfully submitted Form 2728."**

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

18 Keep a copy of the original, signed CMS-2728 Form with the patient's records.

Edit a Saved CMS-2728 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click **Form 2728**. The *Manage Form 2728* screen displays.

7 Click the **Initial Transplant+** link in the Existing 2728 Forms column. The *View ESRD Medical Evidence (2728) – Saved* screen displays.

8 Click **Edit**; the *Edit an ESRD Medical Evidence (2728) – Saved* screen displays.

9 Make any changes or additions to the data and click **Save** or **Submit**. The *View ESRD Medical Evidence (2728) – Saved* (or *Submitted)* screen displays with the message **"Successfully saved (or submitted) Form 2728."**

Print the CMS-2728 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click **Form 2728**. The *Manage Form 2728* screen displays.

7 Click the **Initial Transplant +** link in the Existing 2728 Forms column. The *View ESRD Medical Evidence (2728) – Saved* screen displays.

8 Click **Edit**; the *Edit an ESRD Medical Evidence (2728) – Saved* screen displays.

9 Click **Print**. EQRS displays the CMS-2728 Form in a PDF format.

10 Click the **Printer icon**; enter any print parameters and click **OK**.

Add a Re-entitlement CMS-2728 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

4 Enter your search criteria. Click **Submit**. The *Search Patient Results* screen displays a list of patients matching your search criteria.

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click **Form 2728**. The *Manage Form 2728* screen displays.

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

8 Enter all available information and click **Save**. The message **"Successfully saved Form 2728"** displays.

9   Click **Print**. EQRS displays the CMS-2728 Form in a PDF format.

10 Click the **Printer icon**; enter any print parameters and click **OK**.

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

12 Go back to EQRS to complete the CMS-2728 Form; repeat **Steps 1-6**.

13 Click the **Re-entitlement Transplant +** link in the Existing 2728 Forms column. The *View ESRD Medical Evidence (2728) – Saved* screen displays.

14 Click **Edit**; the *Edit an ESRD Medical Evidence (2728) – Saved* screen displays.

15 In Sections E-F, enter the dates the attending physician and patient signed the form, and click **Submit**.

16 The *View ESRD Medical Evidence (2728) – Submitted* screen displays with the message **"Successfully submitted Form 2728."**

Add a Supplemental CMS-2728 Form

1   Log in to EQRS.

2   Click **Patients**.

3   Click **Search Patients**. The *Search Patients* screen displays.

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

5   Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6   Click **Form 2728**. The *Manage Form 2728* screen displays.

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

8   Enter all available information and click **Save**. The message **"Successfully saved Form 2728"** displays.

9   Click **Print**. EQRS displays the CMS-2728 Form in a PDF format.

10 Click the **Printer icon**; enter any print parameters and click **OK**.

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

12 Go back to EQRS to complete the CMS-2728 Form; repeat **Steps 1-6**.

13 Click the **Supplemental Transplant+** link in the Existing 2728 Forms column. The *View ESRD Medical Evidence (2728) – Saved* screen displays.

14 Click **Edit**; the *Edit an ESRD Medical Evidence (Supplemental 2728) – Saved* screen displays.

15 In Sections E-F, enter the dates the attending physician and patient signed the form, and click **Submit**.

16 The *View ESRD Medical Evidence (2728) – Submitted* screen displays with the message "Successfully submitted Form 2728."

Add Patient Treatment Information

1   Log in to EQRS.

2   Click **Patients**.

3   Click **Search Patients**. The *Search Patients* screen displays.

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

5   Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6   Click the **Treatments** link. The *View Patient Treatments* screen displays.

7 Click the **Admit Date**. The screen refreshes and displays the Treatment Start Date in the Treatment Summary section.

8 Click the **New Treatment** link. The *Add Treatment Information* screen displays.

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

10 The *View Treatment Information* screen displays with the new treatment record.

Admit a New ESRD Transplant Patient (no previous dialysis or kidney transplant)

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Amit a Patient**. The *Admit Patient* screen displays.

4 Enter the patient's information and select *New ESRD Patient* in the **Admit Reason** field. Click **Next**. The screen refreshes and displays the following sections:

   a Ethnicity, race, tribe and origin
   b Contact Information
   c Miscellaneous Information
   d Medical Information
   e Admission Information
   f Transplant Treatment Information

NOTE: *Add any information that will be required for the CMS-2728, CMS-2746, or CMS-2744 Forms.*

5 Enter all available data and click **Submit**. The message **"Patient admission was successful"** displays.

Admit an Existing Patient (dialysis to transplant or transplant to transplant)

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Amit a Patient**. The *Admit Patient* screen displays.

4 Enter the patient's information. Select *Transplant* in the **Admit Reason** field. Click **Next**.

Near Match – In Scope Patient

From **Step 4**, the *Near Match Select* screen displays with the message, **"Possible duplicate patients outside of your scope have been identified. It is recommended that you contact your ESRD Network to investigate the possible duplicate(s) for the patient you are admitting. You may not admit this patient without the assistance of your ESRD Network."**

5 Contact your ESRD Network for further assistance.

Near Match – Out of Scope Patient

From **Step 4**, the *Near Match Select* screen displays with the message, **"Possible duplicate patients outside of your scope have been identified. It is recommended that you contact your ESRD Network to investigate the possible duplicate(s) for the patient you are admitting. You may not admit this patient without the assistance of your ESRD Network."**

5 Contact your ESRD Network for further assistance.

Exact Match – In Scope or Out of Scope Patient

From **Step 4**, the *Patient Admission Confirmation* screen displays.

5 Click **Accept**. The *Admit Patient* screen displays the message **"Patient match found. New admission record will be created for this patient."**

6 Review the auto-populated information, enter the required information, and click **Submit**. The message **"Patient admission was successful"** displays.

Complete a CMS-2746 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click **Edit**. The *Edit Patient* screen displays.

7 Scroll down to the Medical Information section. Enter the Effective date (must be on or prior to Date of Death), **Death Date** and **Death Code**; then click **Submit**. The *View Patient Demographics* screen displays with the message **"Successfully edited patient."**

8 Click **Form 2746**. The *Add a Death Notice (2746)* screen displays with information pre-populated from the current patient record.

9 Enter all required information on the screen and click either **Save** or **Submit**. The *View a Death Notice (2746) – Saved (or Submitted)* screen displays with the message

"Successfully saved (or submitted) Form 2746."

10 To print the CMS-2746 Form, click **Print**. The CMS-2746 Form displays in a PDF format.

11 Click the **printer icon**; enter any print parameters and click **OK**.

Delete a Saved CMS-2746 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Form 2746** link. The *View a Death Notice (2746) – Saved* screen displays.

7 Click **Delete**. A confirmation webpage dialog screen displays with the message "**Are you sure you want to continue?**"

8 Click **Yes, Delete**. The *View Patient Demographics* screen displays.

Edit a Saved CMS-2746 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Form 2746** link. The *View a Death Notice (2746) – Saved* screen displays.

7 Click **Edit**. The *Edit a Death Notice (2746) – Saved* screen displays.

8 Apply the desired changes; click **Save** or **Submit**. The *View a Death Notice (2746) – Saved (or Submitted)* screen displays with the message **"Successfully saved (or submitted) Form 2746."**

View a CMS-2746 Form

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Form 2746** link. The *View a Death Notice (2746) – Submitted* screen displays.

Discharge a Patient

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

4 Enter your search criteria. Click **Submit**. The *Search Patient Results* screen displays a list of patients matching your search criteria.

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Admissions** link. The *View Patient Admissions* screen displays.

7 Click the **Admit Date**. The screen refreshes and displays the admission information in the <u>View Admission Information</u> section.

8 Click the **Edit**. The screen refreshes and provides the ability to edit the admit and discharge information in the <u>Edit Admission Information</u> section.

9 Enter the **Discharge Date**, select the **Discharge Reason**. Click **Submit**. The *View Patient Admissions* screen displays the Discharge Date and Discharge Reason, and the message **"Admission record updated successful."**

Edit Patient Demographics

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click **Edit**. The *Edit Patient* screen displays.

7 Make the desired changes and click **Submit**. The *View Patient Demographics* screen displays the message **"Successfully edited patient."**

Edit Patient Admit/Discharge Information

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Admissions** link. The *View Patient Admissions* screen displays.

7 Click the **Admit Date**. The screen refreshes and displays the <u>View Admission Information</u> section.

8 Click the **Edit**. The screen refreshes and provides the ability to edit the admit and discharge information in the <u>Edit Admission Information</u> section.

9 Make the desired changes. Click **Submit**. The *View Patient Admissions* screen displays the message **"Admission record updated successful."**

Edit Patient Treatment Information

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Treatments** link. The *View Patient Treatments* screen displays.

7 Click the **Admit Date**. The screen refreshes and displays the Treatment Start Date in the Treatment Summary section.

8 Click the **Treatment Start Date**. The screen refreshes and displays the treatment details in the View Treatment Information section.

9 Click **Edit**. The screen refreshes to enable fields in the Edit Treatment Information section.

10 Make the desired changes and click **Submit**. The *View Patient Treatments* screen displays the message **"Treatment record update successful."**

View a Facility

1 Log in to EQRS.

2 Click **Facilities**.

3 Click **Search Facilities**. The *Search Facilities* screen displays.

4 Enter your search criteria and then click on the desired facility's details. The *Facility Summary* screen displays.

View a Patient's Demographics

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

View Patient Admit/Discharge Information

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Admissions** link. The *View Patient Admissions* screen displays.

7 Click the **Admit Date**. The screen refreshes and displays the View Admission Information section.

View Patient Treatment Information

1 Log in to EQRS.

2 Click **Patients**.

3 Click **Search Patients**. The *Search Patients* screen displays.

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

5 Click the **EQRS Patient ID** for the desired patient. The *View Patient Demographics* screen displays.

6 Click the **Treatments** link. The *View Patient Treatments* screen displays.

7 Click the **Admit Date**. The screen refreshes and displays the Treatment Start Date in the Treatment Summary section.

8 Click the **Treatment Start Date**. The screen refreshes and displays the treatment details in the View Treatment Information section.