CROWNWeb Activity: Notifications and Accretions (Action List)

Every facility, including "batch" facilities (FMC, DaVita, DCI, or others using the NRAA HIE system) is responsible for <u>manually</u> processing notifications and accretions that appear under the "Action List" tab of CROWNWeb.

> **Accretion Records** represents a patient who has not yet been admitted to a facility in CROWNWeb, but has been found in another CMS source. Accretions are rarely (possibly never) sent to facilities.

> **Notifications** are created when the data that is in CROWNWeb does not match data from another Medicare database.

General Info about Notifications:

- Notifications on the Action List must be processed within <mark>15</mark> days, so it is a good idea to check this tab on a weekly basis.

- Your objective is to determine whether the data contained in the notification is correct or not. If the data is correct, then CROWNWeb (**and** your local database – Snappy, Reggie, eCube, etc.) needs to be updated with this information.

- Notifications are sent multiple times until they have been successfully processed.

- You will have some notifications that reflect old data that has already been changed/corrected in CROWNWeb. You must still process these through the Action List, or they will never go away.

- You may receive notifications about the following items:

  - Demographic information such as: First Name, Last Name, DOB, Medicare Number, etc.
  - Event notifications such as: Date of death, Transplants, dialysis treatments, etc.
    - For death events, the information frequently comes from hospitals, acute-care centers, etc.

- Your three choices for resolving notifications are:

  - **Accept** – This means you agree with the information from the other CMS database source.
  - **Reject** – This means you DO NOT agree with the info from the other CMS database.
  - **Investigate** – This choice will not give you more time and will not make a notification record go away. Please DO NOT use this choice, as it does not do anything toward resolving notifications.

- In order to process/clear the Notification you must do one of the following:

  - **Submit** – Accepted notifications should ALWAYS be submitted.
    - **NOTE:** After you click Submit, there will be a warning at the top of the page stating that the information is about to be updated. This is OK. You **<u>SHOULD</u>** select the checkbox to ignore the warning and hit Submit AGAIN.

  - **Escalate** - The only two instances where this is appropriate are:
    - If the CMS data has a death date for a patient who is still alive. These should ALWAYS be escalated with the comment "patient alive as of _____."
    - If you receive a notification about an event occurring at a facility other than your own.

Looking at Notifications and Accretions in CROWNWeb

1. After logging in to CROWNWeb go to the "Action List" Tab

2. Leave "Action Type" blank and click "submit" to bring up all notifications/accretions for your facility. (If you have scope over more than one facility you must select a facility from the drop-down list before hitting "submit.")

3. An "Action List" of Notifications/Accretions will be displayed at bottom of the page. If you have no notifications/accretions you will receive a message saying "0 Records Found."

4. To bring up details on a specific notification, you should click on the hyperlink named "**Notification.**"

- You will be brought to the "View Notification" screen. At top you will see the Patient Details. Below this you will see the specific notification/s for that patient.

NOTE: You may see details for the same notification listed multiple times. You must process (choose an action for) each instance of a notification listed.

- Each notification shows <u>the data item that is in question</u> at the top.

Patient Details (2100000000)					Assigned To: ACME DIALYSIS		
Patient's Last Name: PIG					Patient's First Name: PETUNIA		
SSN: 123456789					Medicare Claim Number:		
Date of Birth: 03/16/1951					Gender: Female		

Notifications

Medicare Claim Number							
Source	Value	Facility	Treatment	Ext. Source Effective Date	CROWNWeb Create Date	Days Open	Status
EDB	123456789A			02/27/2017	02/27/2017	10	New
CROWNWeb							

Action	Comments	Comments History
Accept		

[Submit] [Reassign] [Escalate]

- The far-left column indicates the database "Source" where the discrepant data exists. The following column shows the value from the outside database (top row) compared to the value that exists in CROWNWeb.

- If a column contains no data (is blank), this means that no data exists. For instance, for Death Event Notifications, under the "Value" column, typically the CROWNWeb value will be blank. This would mean that, on the date the notification was created, CROWNWeb had no death date.

- Review each individual notification for the patient and select the appropriate action from the Action dropdown. For duplicate notifications, it is appropriate to select the same action for each. Click the Submit button to finish processing the selected Action(s). **You may need to hit Submit twice – see NOTE on the next page.**

Guidelines for choosing a resolution for Notifications

- Notifications about Medicare Numbers should ALWAYS be accepted because these come from Medicare (listed as EDB on the Source column) and therefore are correct.

- Notifications about death events are usually correct, and should be accepted unless you KNOW the patient is still alive.

- Notifications about demographic information such as First Name, Last Name, DOB should be accepted UNLESS you have legal documentation that disputes the information. Acceptable documentation includes:
    - A recent Medicare Card – **ONLY for patient's First or Last Name**.
    - A Social Security Card – **ONLY for Social Security Number**.
    - Birth Certificate- ONLY for Date of Birth.
- If you accept a DEMOGRAPHIC notification about Fname, Lname, DOB, gender, SSN, or Medicare Number, the patient's attributes' page in CROWNWeb will automatically be updated – but only AFTER you have successfully "Submitted" the notification.

NOTE: After you click Submit, there will be a warning above the notification stating that the patient's information is about to be updated. **This is OK.** You **SHOULD** select the checkbox to ignore the warning and hit Submit AGAIN.

- Notifications about events (Admits/Discharges, and Dialysis Treatments) typically come from Medicare billing records, so are usually correct and therefore should be accepted.

- When accepting **EVENT** Notifications, you must <u>manually</u> enter the appropriate Admit/Discharge and Treatment records into CROWNWeb. Accepting or rejecting will not add the event or treatment; you must enter this information manually.

NOTE: See the Editor Quick Start Guides on the Project CROWNWeb website at http://www.projectcrownweb.org/assets/quickstartguides/FacilityEditorQuickStartGuide.pdf for instructions on how to access and edit an Admit/Discharge or Treatment record.

- After you have made the changes to the Admit/Discharge or treatment record you then can accept the notification (and hit submit) to make it go away.

NOTE: After you click Submit, there will be a warning to ensure you have added the admit/discharge or treatment information. You **SHOULD** select the checkbox (if you did update CROWNWeb) and hit Submit AGAIN.

If you disagree with information from a notification hit "Reject" and submit, and this will remove the notification from your action list.

N & A Definitions

Notification

- **ACCEPT** – You agree with the external source; the patient is part of your facility and changes are made.

- **REJECT** – After research, you do not agree with the Notification and no changes are made.

- **INVESTIGATE** – Lets another user know you are investigating this patient.

- **ESCALATE** – If the patient is not part of your facility or you require assistance in making a determination; the notification is reassigned to the Network for help.

Accretion

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

- **REJECT** – You don't agree with the Accretion. You've researched and the patient is _not_ _ESRD._

- **INVESTIGATE** – Lets another user know you are investigating this patient.

- **ESCALATE** – The patient is not in your facility. The Network will need to reassign the Accretion.