



Connecting the Pieces

# CROWNWeb Data Management Guidelines



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# Introduction and Background

## Introduction

On June 14, 2012, the Centers for Medicare & Medicaid Services (CMS) released CROWNWeb—a Web-based data collection system to be used by all Medicare-certified dialysis facilities throughout the United States and U.S. territories to securely report facility and patient data directly to CMS.

Over 20,000 authorized representatives at more than 6,000 Medicare-certified renal dialysis facilities and select renal transplantation centers use CROWNWeb to process and access information that includes facility details, patient admission/discharge data, CMS forms data, and patient lab results. Additionally, other end stage renal disease (ESRD) stakeholders, including ESRD Network representatives, use CROWNWeb to support data accuracy and to provide technical assistance to dialysis facilities and other users.

To help ensure that all data reported via CROWNWeb accurately reflect the quality of patient care it is vital that all CROWNWeb users understand and follow standardized processes when completing specific tasks within CROWNWeb.

This document describes standardized CROWNWeb data management processes created, reviewed, and approved by CMS. CROWNWeb users should reference these guidelines when overseeing CROWNWeb data entry and reporting efforts.

Tasks to be completed by CROWNWeb users and submission timelines are identified in this CROWNWeb Data Management Guidelines document. These tasks fall into three categories:

1. **Data Monitoring** consists of policies, processes, and practices that address the accuracy, validity, completeness, timeliness, and integrity of data (data quality).
2. **Data Quality Measuring** quantifies quality of care through comparison to a criterion. Quality measurements typically focus on structures or processes of care that have a demonstrated relationship to positive health outcomes.
3. **Data Quality Managing** consists of the business processes that ensure the integrity of an organization's data during collection, application (including aggregation), warehousing, and analysis.<sup>1</sup>

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<sup>1</sup> Source of definitions:

[http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1\\_049664.hcsp?dDocName=bok1\\_049664](http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1_049664.hcsp?dDocName=bok1_049664)

## CROWNWeb Overview

CROWNWeb is a CMS-mandated data collection system that every Medicare-certified dialysis facility must use to input its patient- and facility-level data. Further, select kidney transplantation centers and other ESRD providers voluntarily input data into CROWNWeb.

CROWNWeb is a Web-based data collection system, which means that users are not required to install software onto their computers. The information stored in CROWNWeb can be accessed from virtually anywhere at any time, barring maintenance downtime.

## CROWNWeb's Release

The Conditions for Coverage for End-Stage Renal Disease Facilities (<http://www.cms.hhs.gov/CFCsAndCoPs/downloads/ESRDfinalrule0415.pdf>) published in April 2008 outline the need for CROWNWeb on page 20484:

*494.180(h) - Standard: Furnishing data and information for ESRD program administration. Effective February 1, 2009, the dialysis facility must furnish data and information to CMS and at intervals as specified by the Secretary. This information is used in a national ESRD information system and in compilations relevant to program administration, including claims processing and reimbursement, quality improvement, and performance assessment. The data and information must —*

- (1) Be submitted at the intervals specified by the Secretary;*
- (2) Be submitted electronically in the format specified by the Secretary;*
- (3) Include, but not be limited to—*
  - (i) Cost reports;*
  - (ii) ESRD administrative forms;*
  - (iii) Patient survival information; and*
  - (iv) Existing ESRD clinical performance measures, and any future clinical performance standards developed in accordance with a voluntary consensus standards process identified by the Secretary.*

## Using CROWNWeb

CROWNWeb allows users to enter data, manage data, and generate reports in the following areas:

- Patient information (including demographics and treatment and admission records)
- Facility information (including contact information, hours, and types of services)
- Personnel information (including current staff members and job titles)
- Clinical values and vascular access data.

## Supporting CMS Goals

CROWNWeb supports a multitude of CMS initiatives. Patient admissions and discharges and clinical and vascular access data reported via CROWNWeb back CMS' goal to optimize health outcomes as part of the CMS Quality Strategy; efforts to promote high-quality patient care through the ESRD Quality Incentive Program (ESRD QIP); and endeavors highlighted as part of the CMS Triple Aim—Better Care for the Individual through Beneficiary- and Family-Centered Care, Better Health for the ESRD Population, and Reduce Costs of ESRD Care by Improving Care.



## CROWNWeb Account Maintenance

Due to the sensitivity of the data stored in CROWNWeb, all users must complete an identity authentication process in CMS' QualityNet Identity Management System (QIMS). CROWNWeb users will be appointed roles and scopes by their designated CROWNWeb Facility Administrators once the user successfully completes the QIMS registration process.

### What is QIMS?

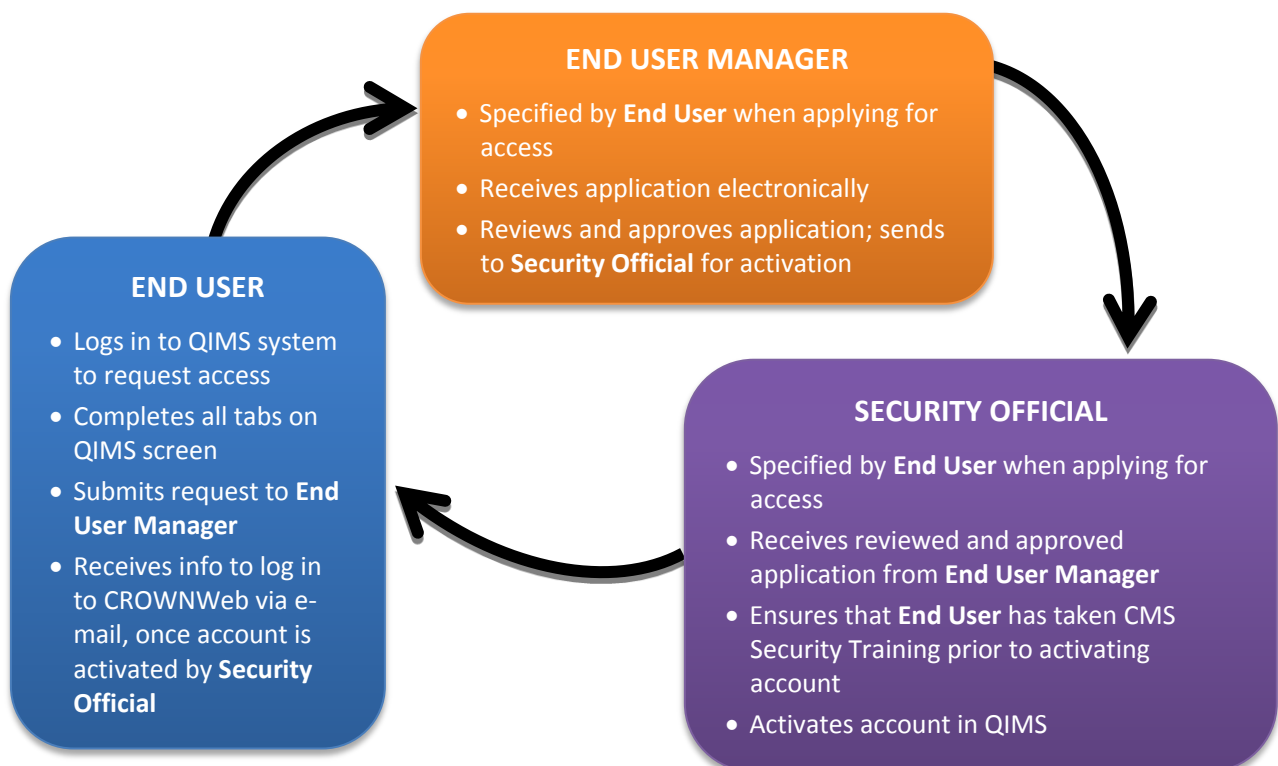
QIMS is an identity authorization and management system put in place by CMS to manage access to key government information systems, such as CROWNWeb.

QIMS provides tiered levels of account access and management to CROWNWeb users. As part of this process, individuals serving as their facilities' Security Officials (SOs) and End User Managers (EUMs) authorize and manage other users' access to CROWNWeb at their facilities via QIMS.

Overview of QIMS roles:

- **End User** – The individual submitting the request for a QIMS account.
- **End User Manager** – The individual who must review and approve the information submitted by the account requestor.
- **Security Official** – The individual who must activate the account.

The following image outlines the process required to request and obtain an End User QIMS account. Visit <http://projectcrownweb.org/education/qims-training-videos> for step-by-step instructions on completing the QIMS account registration process.



## Roles and Responsibilities

### CROWNWeb Roles

CROWNWeb has four roles in which a user can serve. CROWNWeb User Role Types:

- **Viewer** – Views previously submitted data.
- **Editor** – Enters data into CROWNWeb.
- **Batch** – Electronically uploads data into CROWNWeb on behalf of facilities within the user's scope.
- **Administrator** – Manages CROWNWeb access.

### CROWNWeb Data Manager

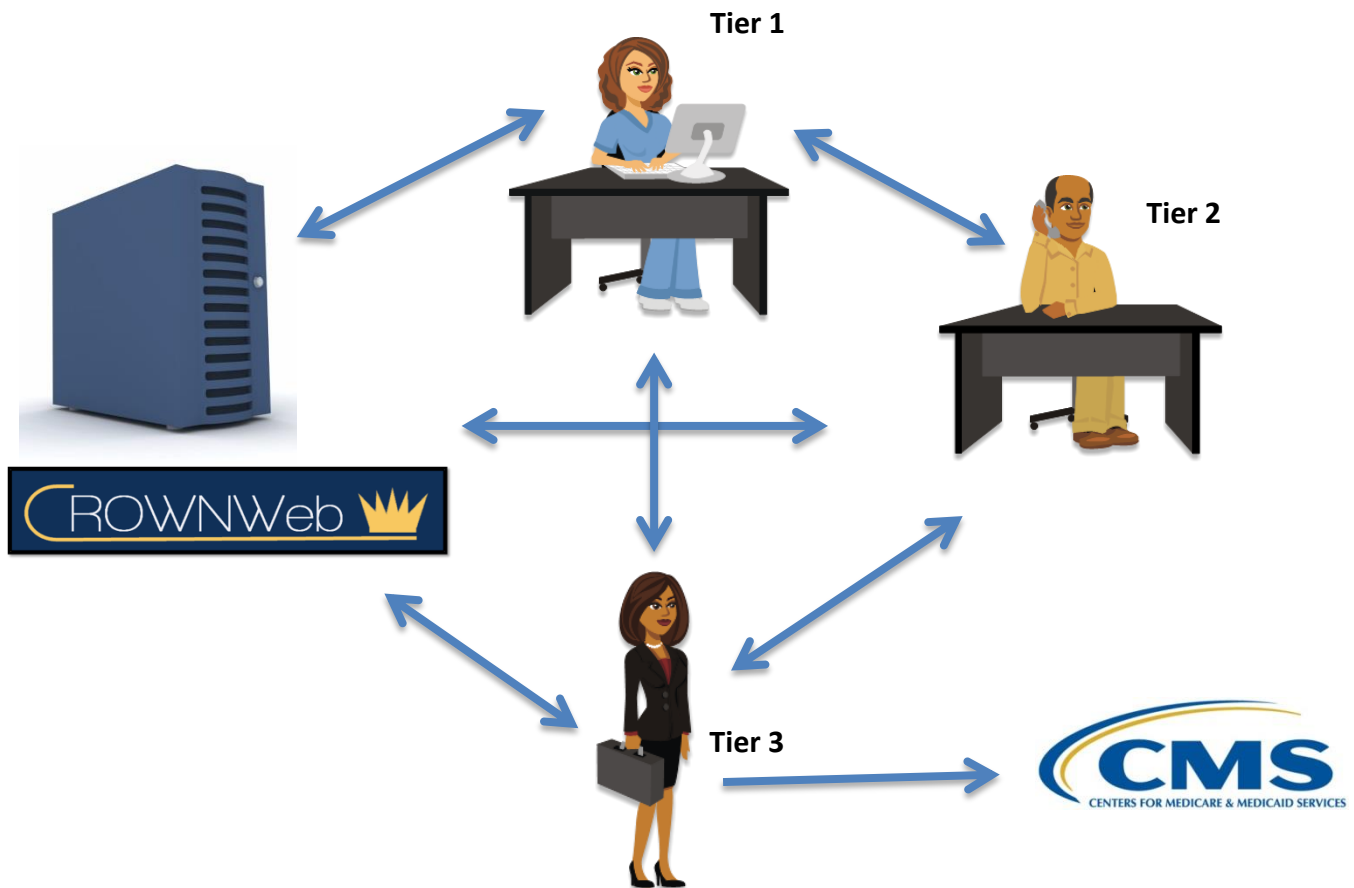
CROWNWeb data entries are overseen by CROWNWeb Data Managers. A CROWNWeb Data Manager is defined as any authorized CROWNWeb user who oversees or assists with promoting data quality by **monitoring**, contributing to data effectiveness by **measuring**, and ensuring data reliability by **managing** accurate and timely data submissions.

There are three tiers of CROWNWeb Data Managers. Each tier encompasses activities that support accurate and timely reporting of data via CROWNWeb. CROWNWeb Data Managers by tiers:

- **Tier 1 – Individuals or groups that manually enter patient and facility details directly into CROWNWeb**, or those affiliated with an organization that electronically uploads information on behalf of a Medicare-certified facility. Tier 1 CROWNWeb Data Managers include facility-level users and Electronic Data Interface (EDI) submitters.
- **Tier 2 – Individuals or groups that provide technical data reporting assistance.** Tier 2 CROWNWeb Data Managers primarily monitor data reporting efforts to foster accurate and timely submissions by Tier 1 users. Additionally, Tier 2 CROWNWeb Data Managers input data directly into CROWNWeb to support data reporting requirements. Tier 2 users analyze report data to determine appropriate support activities for improving quality of both data and healthcare outcomes. Tier 2 CROWNWeb Data Managers include ESRD Network-level users.
- **Tier 3 – Individuals or groups that support CMS data reporting needs**, as well as monitor and analyze CROWNWeb data entry. Additionally, individuals or groups in this classification support Tier 1 and Tier 2 CROWNWeb Data Managers. Tier 3 CROWNWeb Data Managers include CROWNWeb data support contractors such as those responsible for the QualityNet Help Desk, CROWN Data Discrepancy Support (CDDS), and Production Data Management (PDM) and the CROWNWeb Application Development Organization (ADO).

See the next page for an illustration of how CROWNWeb Data Manager Tiers work together.

# CROWNWeb Data Management Guidelines



In their respective roles, CROWNWeb Data Managers:

- Support the third “arm” of the CMS Triple Aim: Reduce Costs of ESRD Care by Improving Care
- Foster timely and accurate reporting by facilities by analyzing data submission and quality using CROWNWeb reports
- Assist with or oversee CROWNWeb data entry for Medicare-certified dialysis facilities, kidney transplantation centers, and Veterans Health Administration (VHA) facilities
- Work to resolve Action List discrepancies generated by the Renal Management Information System (REMIS) or reassigned by another CROWNWeb Data Manager
- Generate, review, and finalize CMS-2744 ESRD Facility Survey submissions in CROWNWeb
- Monitor compliance with ESRD QIP reporting and performance measures
- Assist CMS and other ESRD stakeholders with **monitoring**, **measuring**, and **managing** all CROWNWeb data.

Tasks authorized to be performed by specific CROWNWeb Data Managers are identified in the following sections of these CROWNWeb Data Management Guidelines.



# Chapter 1

## Data Monitoring



## Data Monitoring

CROWNWeb has eight tasks that support efforts to promote data quality through data monitoring. CROWNWeb also offers multiple reports and search capabilities that provide users with the means to monitor and audit data entry efforts.

CROWNWeb Section	Task in CROWNWeb	Authorized Tier
Facilities	Monitor Facility Attestation	Tier 1, Tier 2, and Tier 3
	Monitor Facility Details	Tier 1 and Tier 2
	Monitor Saved Facilities	Tier 2
Personnel	Review Personnel Information	Tier 1
Reports	Generate Duplicate Patients Report	Tier 2 and Tier 3
	Generate Missing Forms and Saved Status Reports	Tier 1 and Tier 2
	Generate Transient Patients Report	Tier 2
	Generate Unverified Patient Attributes and Related Treatment (PART) Report	Tier 2

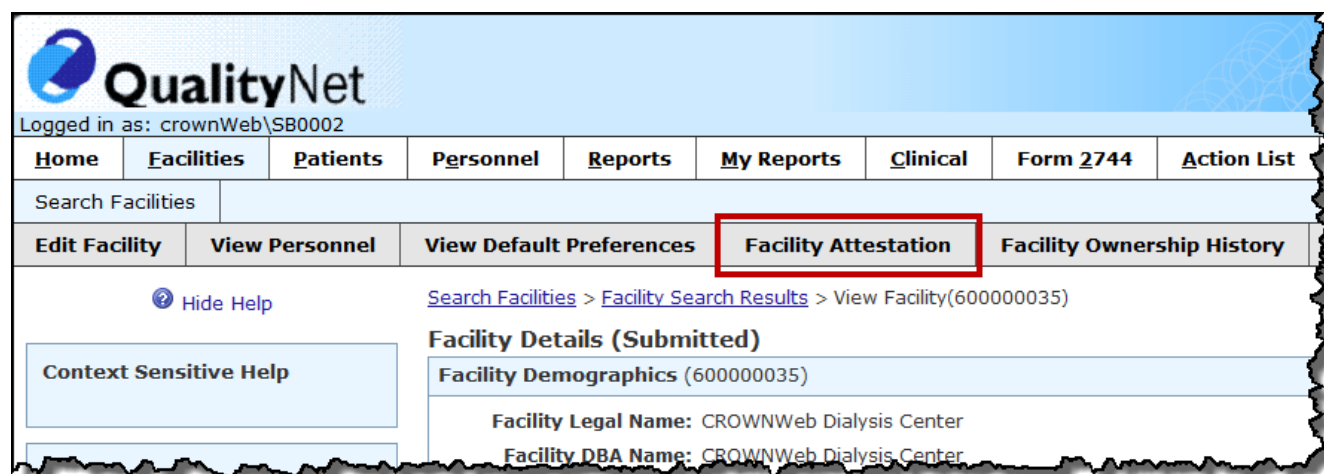
This chapter provides further details about CROWNWeb data monitoring and the timeframes for performing required tasks to support data accuracy.

## Facilities

### Monitor Facility Attestation

<b>Key Points</b>	<ul style="list-style-type: none"> <li>CROWNWeb is used as a tool to support the ESRD QIP.</li> <li>The Facility Attestation submission period in CROWNWeb is January 1–31 of each year.</li> <li>Tier 1 and Tier 2 CROWNWeb Data Managers use the system to monitor the attestation statuses of facilities within their scope.</li> </ul>
<b>Frequency</b>	<p>Tier 1 CROWNWeb Data Managers monitor Facility Attestations in CROWNWeb to help ensure that required data are completed by January 31 of each year.</p> <p>Tier 2 and Tier 3 CROWNWeb Data Managers monitor Facility Attestation completion each week during the month of January and provide completion reminders to facilities.</p>
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations">http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations</a> for instructions on how to monitor Facility Attestations in CROWNWeb.

Figure 1: Example of Facility Attestation Option in CROWNWeb.



# CROWNWeb Data Management Guidelines

## Monitor Facility Details

<b>Key Points</b>	<ul style="list-style-type: none"><li>• CROWNWeb contains details related to facilities' ownership history, services, certifications, and number of Medicare-certified stations.</li><li>• Information entered on the <i>Facility Details</i> screen supports the ESRD QIP, Dialysis Facility Reports, Dialysis Facility Compare, and the CMS-2744 ESRD Facility Survey.</li><li>• Tier 1 and Tier 2 CROWNWeb Data Managers assist with promoting data accuracy by using CROWNWeb to monitor facility details to ensure that the system contains up-to-date information.</li></ul>
<b>Frequency</b>	Tier 1 and Tier 2 CROWNWeb Data Managers ensure that all necessary facility updates are applied annually by December 31 in support of the CMS-2744 ESRD Facility Survey.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations">http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations</a> for instructions on how to monitor and update facility details in CROWNWeb.

Figure 2: Example of Search Results Showing Facility Demographics.

[Search Facilities](#) > [Facility Search Results](#) > View Facility(600000035)

**Facility Details (Submitted)**

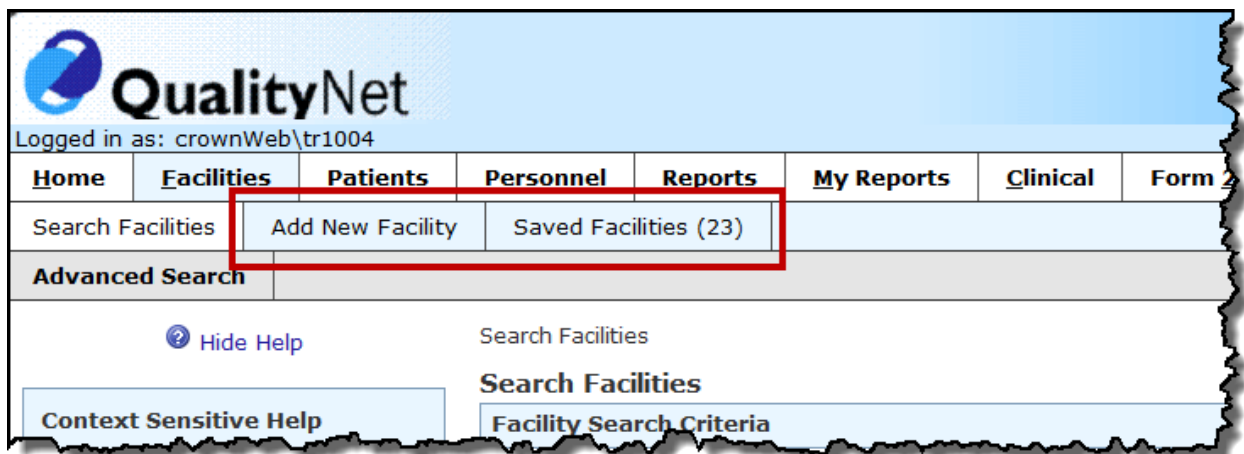
<b>Facility Demographics (600000035)</b>		Submit Date: 11/07/2005
<b>Facility Legal Name:</b> CROWNWeb Dialysis Center		
<b>Facility DBA Name:</b> CROWNWeb Dialysis Center (Same as Legal Name <input checked="" type="checkbox"/> )		
<b>Facility CCN:</b> 112523		<b>Facility NPI:</b> 1992889596
<b>Network Facility Code:</b> 38		<b>Organizational Facility Code:</b>
<b>Phone Number:</b> (404) 696-7304		<b>Fax:</b> (404) 699-1656
<b>Facility E-Mail:</b>		<b>Website:</b>
<b>Network:</b> Network 6		
<b>Physical Address</b>		<b>Mailing Address (Same as Physical Address <input type="checkbox"/> )</b>

# CROWNWeb Data Management Guidelines

## Monitor Saved Facilities

<b>Key Points</b>	<ul style="list-style-type: none"><li>• Tier 2 CROWNWeb Data Managers are authorized to “Add” and “Save” new facilities and facility details in the CROWNWeb system.</li><li>• All facilities submitted in CROWNWeb must have a valid CMS Certification Number (CCN).</li><li>• Tier 2 CROWNWeb Data Managers monitor facility status to ensure that “Saved” facilities are updated with required information.</li><li>• Patient and facility data cannot be submitted in CROWNWeb for facilities that are in a “Saved” status.</li></ul>
<b>Frequency</b>	Tier 2 CROWNWeb Data Managers monitor facility data entry to ensure that all “Saved” facilities are submitted (fully processed) in CROWNWeb by the 1st business day of each month.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/editing-deleting-saved-facility">http://mycrownweb.org/pcw_course/editing-deleting-saved-facility</a> for instructions on how to monitor and edit a “Saved” facility in CROWNWeb.

Figure 3: Example of Add New Facility and Saved Facilities Options in CROWNWeb.





# CROWNWeb Data Management Guidelines

## Personnel

### Review Personnel Information

<b>Key Points</b>	<ul style="list-style-type: none"><li>CROWNWeb allows Tier 1 and Tier 2 CROWNWeb Data Managers to list key personnel at facilities within their scope.</li><li>Personnel entered in CROWNWeb display on other screens, such as:<div><div>Facility Attestation</div><div>Treatment Summary</div><div>CMS-2728</div><div>CMS-2746</div></div></li><li>ESRD stakeholders utilize personnel data in CROWNWeb for various communication efforts.</li><li>Tier 1 CROWNWeb Data Managers review Personnel Details to ensure that CROWNWeb contains information on current staff members.</li></ul>
<b>Frequency</b>	Tier 1 CROWNWeb Data Managers review the <i>Personnel Information</i> section in CROWNWeb at least quarterly.
<b>How To:</b>	Visit <a href="http://mycrownweb.org/pcw_course/adding-facility-personnel">http://mycrownweb.org/pcw_course/adding-facility-personnel</a> for instructions on how to access and updated the <i>Personnel Details</i> section in CROWNWeb.

Figure 4: Example of Personnel Details in CROWNWeb.

QualityNet  
Logged in as: crownWeb\SB0002  
Session expires in 13:40

Home Facilities Patients Personnel Reports My Reports Clinical Form 2744 Action List Admin

Search Personnel Add Personnel

Edit Personnel

Search Personnel > Personnel Search Results > Personnel Details(2104371262)

Personnel Details

Key Personnel Info

Submit Date: 06/01/2012

Inactive Record ☐

Salutation: Dr.  
First Name: Ima  
Middle Initial:  
Last Name: Doctor  
Suffix:

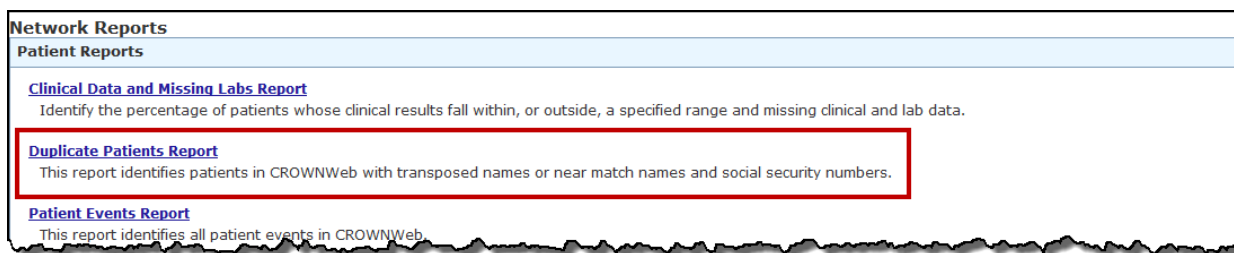
Credentials:  
UPIN: A12345  
Personnel NPI:  
Organization Unique  
Personnel Identifier:

## Reports

### Generate Duplicate Patients Report

<b>Key Points</b>	<ul style="list-style-type: none"><li>• CROWNWeb provides Tier 2 and Tier 3 CROWNWeb Data Managers with the ability to identify patients in the system with transposed names or near match details.</li><li>• The entry of duplicate patients in CROWNWeb affects the accuracy and reliability of system-generated reports, and the validity of data provided to ESRD research organizations, such as the United States Renal Data System (USRDS).</li><li>• Tier 2 and Tier 3 CROWNWeb Data Managers utilize CROWNWeb’s Duplicate Patients Report to identify and work toward resolving duplicate patient entries at facilities within their scope.</li></ul>
<b>Frequency</b>	Tier 2 and Tier 3 CROWNWeb Data Managers generate Duplicate Patients Reports monthly.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/running-network-reports">http://mycrownweb.org/pcw_course/running-network-reports</a> for instructions on how to generate Network Reports in CROWNWeb.

Figure 5: Duplicate Patients Report in CROWNWeb.



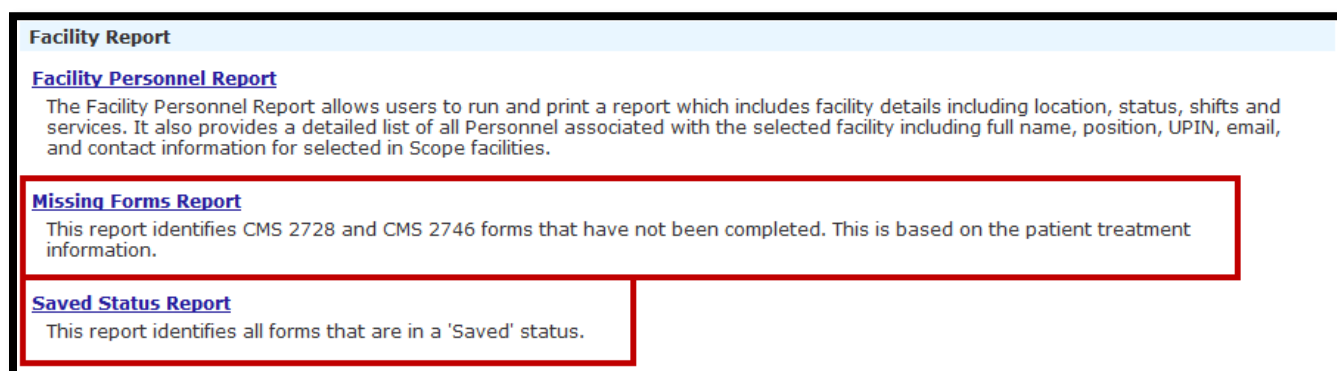
# CROWNWeb Data Management Guidelines

## Generate Missing Forms Report and Saved Status Report

<b>Key Points</b>	<ul style="list-style-type: none"><li>• Tier 1 CROWNWeb Data Managers use CROWNWeb to complete the CMS-2728 Medicare Entitlement and/or Patient Registration form and the CMS-2746 ESRD Death Notification form by their respective due dates.</li><li>• Tier 2 CROWNWeb Data Managers use CROWNWeb to complete CMS-2728 and CMS-2746 forms for kidney transplantation and VHA facilities.</li><li>• CROWNWeb provides all CROWNWeb Data Managers with a means of generating Missing Forms Reports and Saved Status Reports to identify patients whose forms have not been submitted.</li><li>• The Missing Forms Report displays all patients currently or previously affiliated with a user's in-scope facility with a "Due" or "Past Due" CMS-2728 and/or CMS-2746 form.</li><li>• The Saved Status Report identifies all CMS-2728 and CMS-2746 forms that were "Saved," but still require completion or submission.</li></ul>
<b>Frequency</b>	Tier 1 and Tier 2 CROWNWeb Data Managers generate Missing Forms Reports and Saved Status Reports at least monthly.
<b>How To:</b>	Visit <a href="http://mycrownweb.org/pcw_course/running-facility-reports">http://mycrownweb.org/pcw_course/running-facility-reports</a> for instructions on how to generate Facility Reports in CROWNWeb.

**Note:** The CMS form completion process will be covered in the CROWNWeb Data Managing chapter.

Figure 6: Missing Forms Report and Saved Status Report in CROWNWeb.

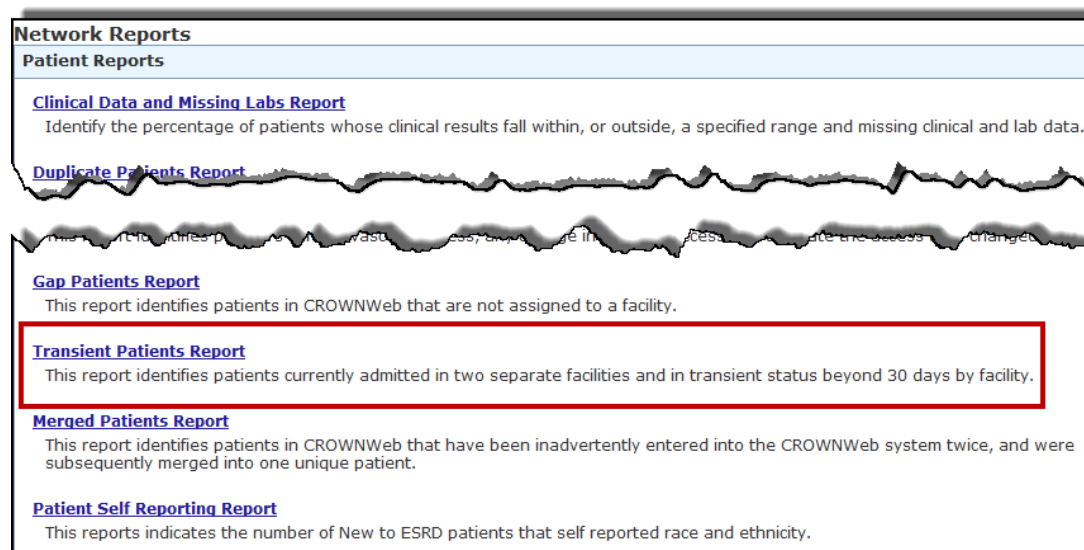


# CROWNWeb Data Management Guidelines

## Generate Transient Patients Report

<b>Key Points</b>	<ul style="list-style-type: none"><li>• All patient admissions and discharges must be recorded in CROWNWeb—including the admission of patients temporarily dialyzing as transient.</li><li>• A transient patient requires short-term dialysis at a facility other than his/her home facility for less than 30 days or fewer than 13 treatments.</li><li>• The Transient Patients Report identifies patients affiliated with two separate facilities and still in a transient status beyond 30 days.</li></ul>
<b>Frequency</b>	Tier 2 CROWNWeb Data Managers generate Transient Patients Reports monthly.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/running-network-reports">http://mycrownweb.org/pcw_course/running-network-reports</a> for instructions on how to generate Network Reports in CROWNWeb.

Figure 7: Transient Patients Report in CROWNWeb.

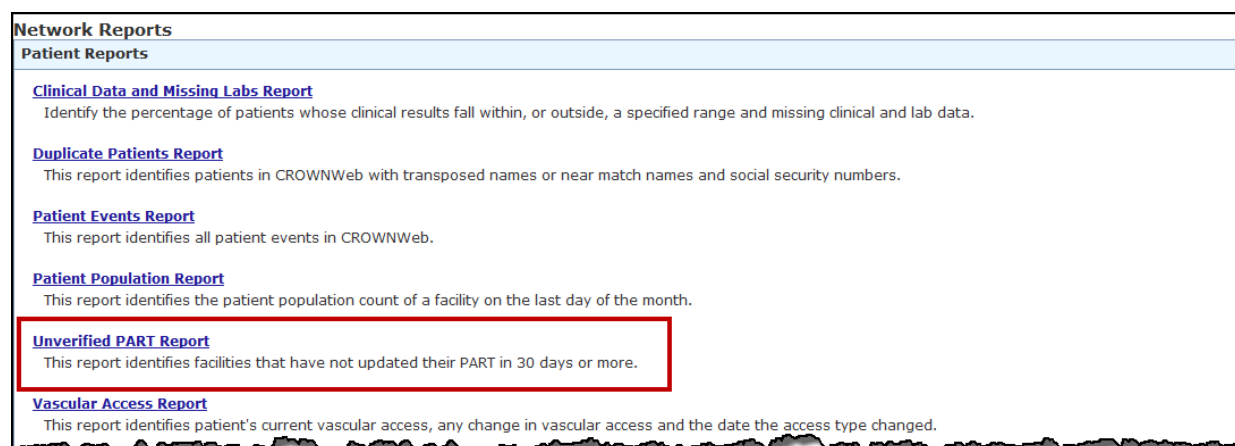


# CROWNWeb Data Management Guidelines

## Generate Unverified PART Report

<b>Key Points</b>	<ul style="list-style-type: none"><li>• Patient Attributes and Related Treatment (PART) data are a set of patient personal and treatment history information obtained from data entered on the <i>Admit/Discharge</i>, <i>Patient Attributes</i>, and <i>Dialysis Treatment Information</i> screens.</li><li>• The PART tool is used by Tier 1 CROWNWeb Data Managers to verify four key pieces of patient information/activity every 30 days:<ul style="list-style-type: none"><li>○ Patient census</li><li>○ Admit/discharge status (including “Transient status”)</li><li>○ Current treatment information</li><li>○ Current attending physician</li></ul></li><li>• Tier 2 CROWNWeb Data Managers have the ability to run Unverified PART Reports in CROWNWeb to identify facilities that have not updated their PART data in 30 or more days.</li></ul>
<b>Frequency</b>	Tier 2 CROWNWeb Data Managers generate Unverified PART Reports by the 1st business day of each month to identify facilities that still need to complete their PART verification for the previous month.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/running-network-reports">http://mycrownweb.org/pcw_course/running-network-reports</a> for instructions on how to generate Network Reports in CROWNWeb.

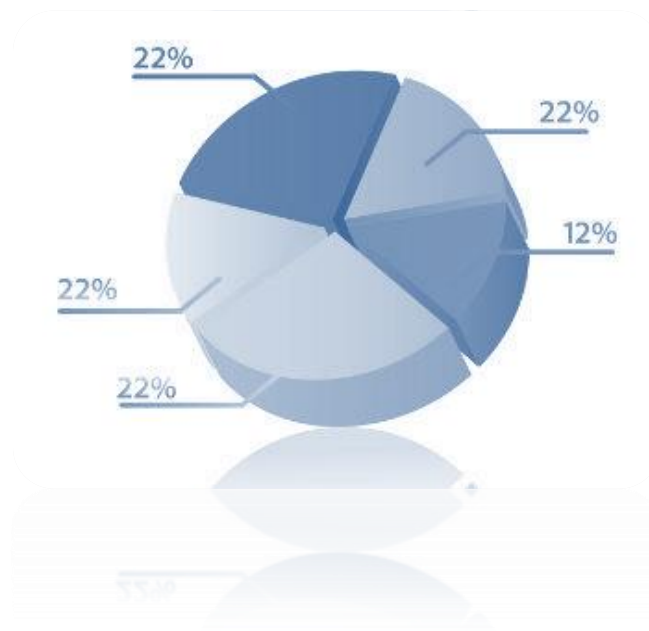
Figure 8: Unverified PART Report in CROWNWeb.





## Chapter 2

# Data Measuring



## Data Measuring

CROWNWeb has three tasks that support efforts to promote data relevancy through data measuring. CROWNWeb also offers multiple reports and search capabilities that allow users to measure the length of time since data were last updated in CROWNWeb, as well as the ability to determine if specific submission goals were met.

CROWNWeb Section	Task in CROWNWeb	Authorized Tier
Reports	Generate Clinical Data and Missing Labs Report	Tier 2 and Tier 3
	Generate Open Accretions Report	Tier 1, Tier 2, and Tier 3
	Generate Open Notifications Report	Tier 1, Tier 2, and Tier 3

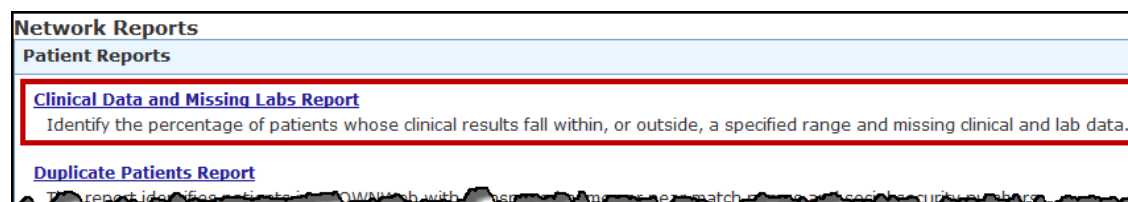
This chapter provides further details about CROWNWeb data measuring and the timeframes for performing required tasks to support CROWNWeb data relevancy.

## Reports

### Generate Clinical Data and Missing Labs Report

<b>Key Points</b>	<ul style="list-style-type: none"> <li>Clinical data entered into CROWNWeb are used for quality measure reporting and for the ESRD QIP.</li> <li>Tier 1 CROWNWeb Data Managers who manage clinical data entries enter the last lab of the month for hemodialysis and peritoneal dialysis patients, or indicate “Not Available” when applicable.</li> <li>Tier 2 and Tier 3 CROWNWeb Data Managers are able to measure clinical data reporting compliance.</li> <li>The Clinical Data and Missing Labs Report allow Tier 2 and Tier 3 CROWNWeb Data Managers to identify the percentages of patients whose reported clinical lab results fall within, or outside, a specified range, and missing clinical and lab data.</li> <li>Tier 2 and Tier 3 CROWNWeb Data Managers can refine the report by selecting a clinical period (Open Clinical Months only), one or more facilities, a treatment type, and the clinical values.</li> <li>Values included as part of this report are: <table border="1" data-bbox="516 1062 1429 1291"> <tr> <td>Hgb</td><td>TSAT</td></tr> <tr> <td>Pre-BUN*</td><td>Ferritin</td></tr> <tr> <td>Post-BUN*</td><td>Phosphorus</td></tr> <tr> <td>Serum Albumin</td><td>Kt/V</td></tr> </table> </li> </ul> <p>*Indicates hemodialysis clinical values only.</p>	Hgb	TSAT	Pre-BUN*	Ferritin	Post-BUN*	Phosphorus	Serum Albumin	Kt/V
Hgb	TSAT								
Pre-BUN*	Ferritin								
Post-BUN*	Phosphorus								
Serum Albumin	Kt/V								
<b>Frequency</b>	Tier 2 and Tier 3 CROWNWeb Data Managers generate Clinical and Missing Labs reports monthly (prior to the closure of each Clinical Month).								
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/running-network-reports">http://mycrownweb.org/pcw_course/running-network-reports</a> for instructions on how to generate Network Reports in CROWNWeb.								

Figure 9: Clinical Data and Missing Labs Report in CROWNWeb.



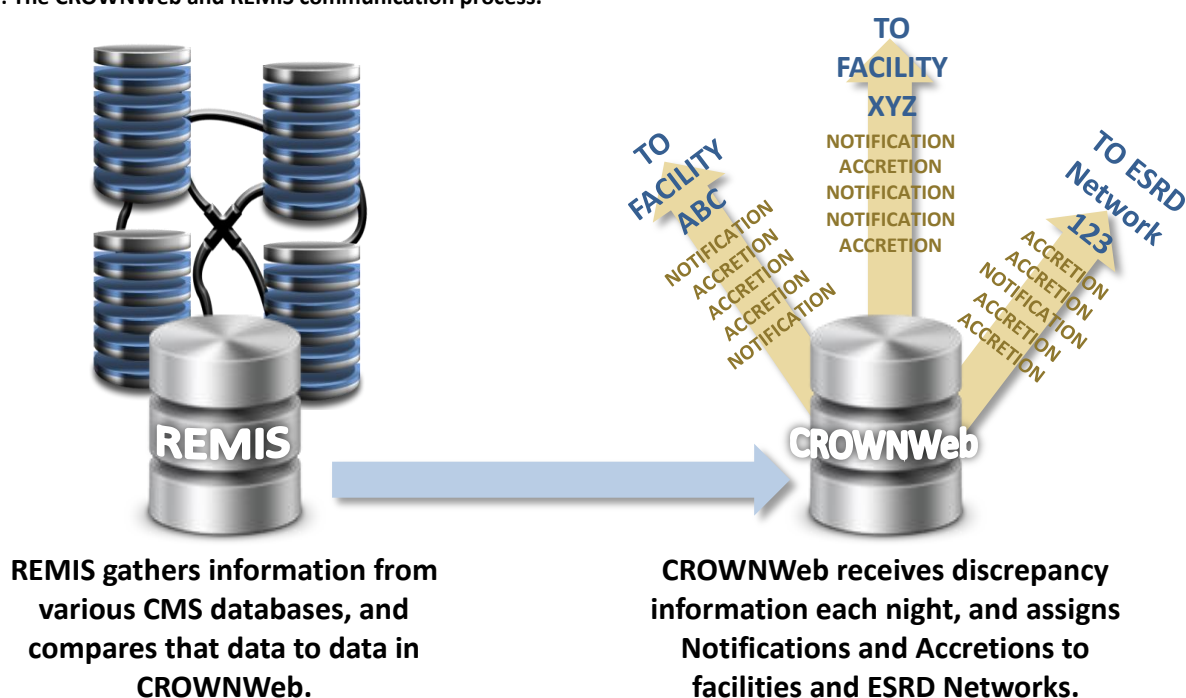


# CROWNWeb Data Management Guidelines

## Generate Open Accretions Report and Open Notifications Report

<b>Key Points</b>	<ul style="list-style-type: none"><li>• CROWNWeb is linked to an external CMS database known as REMIS, which includes information regarding Medicare coverage periods for ESRD patients and tracks the ESRD patient population.</li><li>• CROWNWeb generates Notifications and Accretions on the <i>Action List</i> tab to enable facilities to troubleshoot and correct discrepancies between CROWNWeb and REMIS.</li><li>• All CROWNWeb Data Managers resolve Notifications and Accretions within <u>15</u> days of when they are issued, unless placed “Under Investigation.”</li><li>• Notifications or Accretions placed “Under Investigation” must be resolved within <u>30</u> days of when they are issued.</li><li>• All CROWNWeb Data Managers utilize CROWNWeb to access the Open Notifications and Open Accretions Reports that measure discrepancies supplied by REMIS.</li></ul>
<b>Frequency</b>	Tier 1, Tier 2, and Tier 3 CROWNWeb Data Managers generate Open Notifications Reports and Open Accretions Reports monthly to identify Notifications or Accretions that have been “Open” or “Under Investigation” for >15/30 days.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/running-facility-reports">http://mycrownweb.org/pcw_course/running-facility-reports</a> for instructions on how to generate Facility Reports in CROWNWeb.

Figure 10: The CROWNWeb and REMIS communication process.





# Chapter 3

## Data Managing



## Data Managing

The following 15 user tasks in CROWNWeb support efforts to promote accurate and timely data submissions through data managing:

CROWNWeb Section	Task in CROWNWeb	Authorized Tier
<b>Facilities</b>	Add Facility in CROWNWeb	Tier 2
	Submit Facility Attestations	Tier 1
	Update Facility Details	Tier 1 and Tier 2
<b>Patients</b>	Admit and Discharge Patients	Tier 1 and Tier 2*
	Admit and Discharge Transient Patients	Tier 1
	Complete CMS-2728 and CMS-2746 Forms	Tier 1, Tier 2, Tier 3**
	PART Verification	Tier 1
	Resolve Gap Patients	Tier 1 and Tier 2
<b>Personnel</b>	Add Key Personnel	Tier 1 and Tier 2
<b>Clinical</b>	Manage Clinical	Tier 1
<b>Action List</b>	Resolve Action List Notifications and Accretions	Tier 1, Tier 2, and Tier 3
<b>Form 2744</b>	Add New CMS-2744A Forms	Tier 1
	Add New CMS-2744B Forms	Tier 1 or Tier 2
	Accept/Reject/Finalize CMS-2744 Forms	Tier 2
	Add New CMS-2744A Form for Closed Facilities	Tier 1

\*Tier 2 CROWNWeb Data Managers are authorized to complete patient admissions and discharges, and update records for kidney transplantation and Veterans Health Administration (VHA) centers.

\*\*Tier 3 CROWNWeb Data Managers are authorized to delete and modify CMS-2728 forms and to delete CMS-2746 forms.

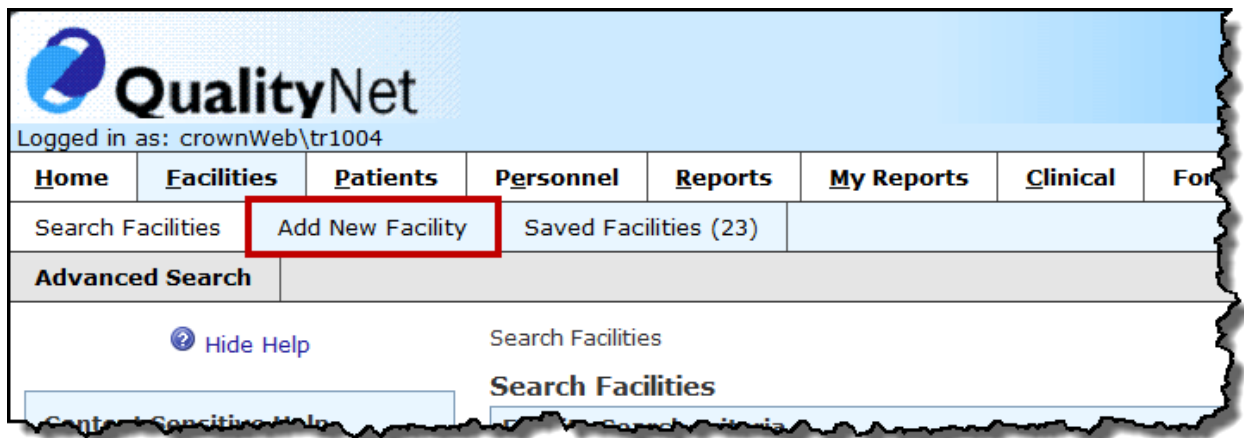
This chapter provides further details about CROWNWeb data managing and the timeframes for performing required tasks to support accurate and timely data submissions.

## Facilities

### Add New Facility in CROWNWeb

<b>Key Points</b>	<ul style="list-style-type: none"> <li>The <i>Facility Details</i> section in CROWNWeb contains details regarding a facility's demographics, ownership, services, certifications, hours, and shifts.</li> <li>CROWNWeb allows Tier 2 CROWNWeb Data Managers to add new Medicare-certified dialysis and kidney transplantation facilities with valid CCNs.</li> <li>Facilities added to CROWNWeb are active upon submission into CROWNWeb, and appear in CMS' QIMS system the following day.</li> </ul>
<b>Frequency</b>	Tier 2 CROWNWeb Data Managers add Medicare-certified dialysis and kidney transplantation facilities into CROWNWeb within 1 business day of receiving the facility's CMS Certification Letter.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/adding-new-facility">http://mycrownweb.org/pcw_course/adding-new-facility</a> for instructions on how to add a New Facility in CROWNWeb.

Figure 11: Add New Facility Option in CROWNWeb.

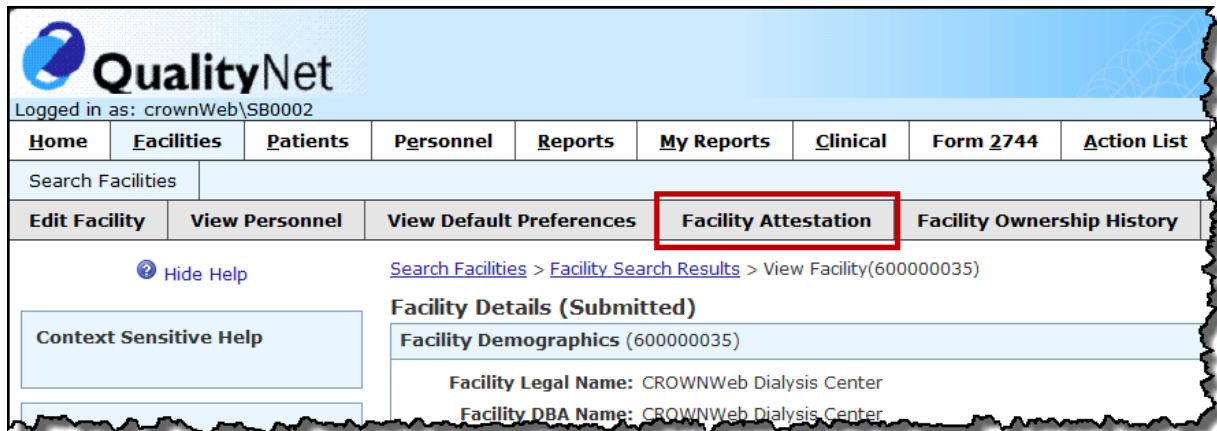


# CROWNWeb Data Management Guidelines

## Submit Facility Attestations

<b>Key Points</b>	<ul style="list-style-type: none"><li>• CROWNWeb Facility Attestations are used to support the ESRD QIP.</li><li>• Tier 1 CROWNWeb Data Managers manually enter or electronically upload data to the <i>Facility Attestation</i> section in CROWNWeb.</li><li>• Tier 1 CROWNWeb Data Managers support the ESRD QIP by working to ensure that accurate Facility Attestation data are reported by CMS-designated submission deadlines.</li></ul>
<b>Frequency</b>	Tier 1 CROWNWeb Data Managers use CROWNWeb to support Facility Attestation submission requirements in January 1–31 of each year (as directed by the ESRD QIP Final Rule per Payment Year).
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations">http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations</a> for instructions on how to manage Facility Attestations in CROWNWeb.

Figure 12: Facility Attestation Tab in CROWNWeb.

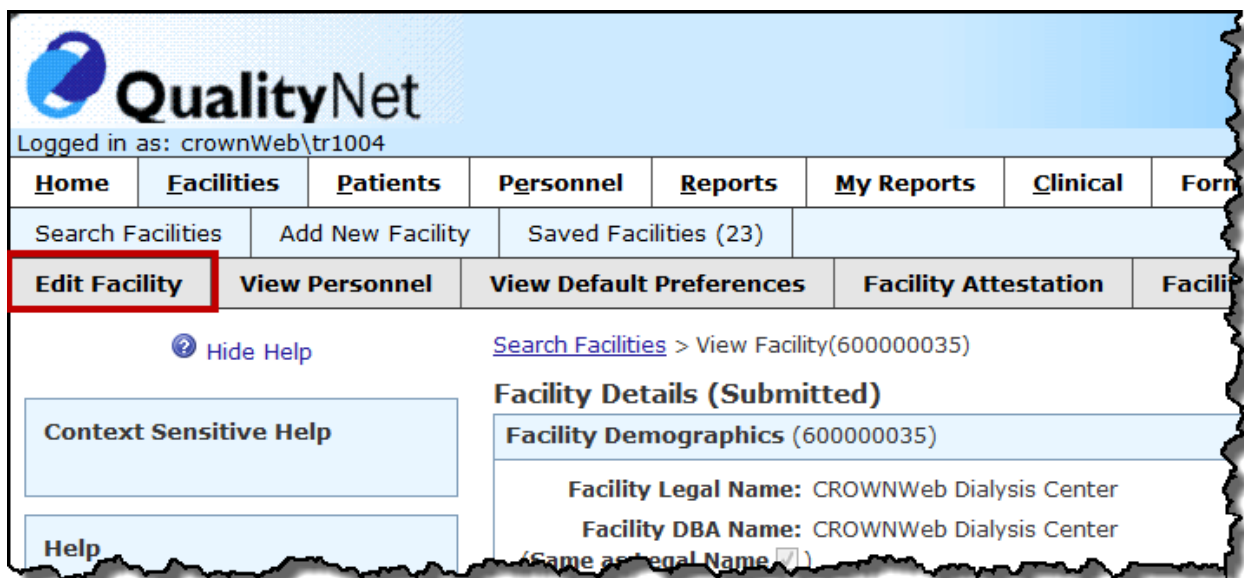


# CROWNWeb Data Management Guidelines

## Update Facility Details

<b>Key Points</b>	<ul style="list-style-type: none"><li>• After valid Medicare-certified facilities are added in CROWNWeb, the system provides Tier 1 and Tier 2 CROWNWeb Data Managers with the ability to update details for facilities that are within their scope.</li><li>• Tier 1 CROWNWeb Data Managers are able to update most fields in CROWNWeb; however, they must work with Tier 2 users to edit disabled fields.</li><li>• Changes made to the <i>Facility Details</i> section appear immediately in CROWNWeb.</li></ul>
<b>Frequency</b>	Tier 1 and Tier 2 CROWNWeb Data Managers review facility details for accuracy at least annually, and apply necessary updates.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations">http://mycrownweb.org/pcw_course/facility-information-default-preferences-attestations</a> for instructions on how to update facility details in CROWNWeb.

Figure 13: Edit Facility Option in CROWNWeb.



## Patients

### Admit and Discharge Patients

<b>Key Points</b>	<ul style="list-style-type: none"> <li>All chronic ESRD patients* dialyzing at Medicare-certified outpatient dialysis facilities must be admitted to a dialysis facility in CROWNWeb.</li> <li>Patients who receive a kidney transplant at a Medicare-certified kidney transplantation center must be admitted to a kidney transplantation center in CROWNWeb.</li> <li>Tier 1 CROWNWeb Data Managers admit and discharge ESRD patients in CROWNWeb to and from Medicare-certified dialysis facilities within their scope.</li> <li>Tier 2 CROWNWeb Data Managers admit and discharge patients to and from kidney transplantation and VHA facilities within their scope.</li> </ul>
<b>Frequency</b>	<p>Tier 1 CROWNWeb Data Managers admit and discharge patients to and from their respective Medicare-certified dialysis facilities within 5 business days of first treatment and discharge within 5 business days of last treatment.</p> <p>Tier 2 CROWNWeb Data Managers admit and discharge patients to and from their respective Medicare-certified kidney transplantation and VHA facilities within 2 business days of notification and discharge within 2 business days of last treatment notification.</p>
<b>How To</b>	<p>Visit <a href="http://mycrownweb.org/pcw_course/admitting-new-patient">http://mycrownweb.org/pcw_course/admitting-new-patient</a> for instructions on how to manage admission of a new patient in CROWNWeb.</p> <p>Visit <a href="http://mycrownweb.org/pcw_course/discharging-patient">http://mycrownweb.org/pcw_course/discharging-patient</a> for instructions on how to manage a discharge in CROWNWeb.</p>

\*Acute ESRD patients should not be entered into CROWNWeb.

**Figure 14: Admit Patient Option in CROWNWeb.**

**Admit Patient**

**Patient Information**

\* SSN  ☐ SSN N/A

\*<sup>1</sup> Medicare Claim Number  ☐ Claim Number N/A

\* Patient's First Name

\* Patient's Last Name

\* Date of Birth mm/dd/yyyy

\* Gender

\* Admit Date 04/14/2015

# CROWNWeb Data Management Guidelines

## Admit and Discharge Transient Patients

<b>Key Points</b>	<ul style="list-style-type: none"><li>• A transient patient receives short-term dialysis at a facility other than his/her home facility for less than 30 days or fewer than 13 treatments.</li><li>• Tier 1 CROWNWeb Data Managers admit and discharge transient patients upon arrival to and departure from the receiving dialysis facility.</li><li>• Change in the patient's transient status:<table><tr><td><b>Returns to Home Facility</b></td><td>Discharge from transient facility.</td></tr><tr><td><b>Transfers to New Facility</b></td><td>Discharge from transient facility.</td></tr><tr><td><b>Remains at Transient Facility ≥30 Days or 13 Treatments</b></td><td>Admit as a Transfer-In Transient Status = "No"</td></tr></table></li></ul>	<b>Returns to Home Facility</b>	Discharge from transient facility.	<b>Transfers to New Facility</b>	Discharge from transient facility.	<b>Remains at Transient Facility ≥30 Days or 13 Treatments</b>	Admit as a Transfer-In Transient Status = "No"
<b>Returns to Home Facility</b>	Discharge from transient facility.						
<b>Transfers to New Facility</b>	Discharge from transient facility.						
<b>Remains at Transient Facility ≥30 Days or 13 Treatments</b>	Admit as a Transfer-In Transient Status = "No"						
<b>Frequency</b>	Tier 1 CROWNWeb Data Managers admit transient patients to their respective Medicare-certified dialysis facilities within 1 business day of treatment and discharge within 1 business day of last treatment.						
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/admitting-discharging-transient-patients">http://mycrownweb.org/pcw_course/admitting-discharging-transient-patients</a> for instructions on how to admit and discharge transient patients in CROWNWeb.						

Figure 15: Admit Transient Option in CROWNWeb.

The screenshot displays the 'Admit Patient' form in CROWNWeb. The form is divided into two main sections: 'Patient Information' and 'Transient Information'. In the 'Patient Information' section, there are fields for 'SSN' (with a red asterisk) and 'SSN N' (with a grey asterisk). Below these is a dropdown menu for 'Facility - DBA Name' with the text 'Select One'. In the 'Transient Information' section, there is a dropdown menu for 'Transient Status' with 'Yes' selected. Below this is another dropdown menu for 'Transient Reason'. At the bottom, there are two text input fields for 'Address Line 1' and 'Address Line 2'.



# CROWNWeb Data Management Guidelines

## Complete CMS-2728 and CMS-2746 Forms

<b>Key Points</b>	<ul style="list-style-type: none"><li>• The CMS-2728 ESRD Patient Medicare Entitlement and/or Patient Registration form serves as the Medicare enrollment and patient registry form for all renal and kidney transplant patients in the United States and U.S. territories.</li><li>• CMS-2728 forms are completed and submitted directly to CMS via CROWNWeb. The original signed CMS-2728 is provided to the Social Security Administration (SSA) if the patient is applying for ESRD Medicare benefits.</li><li>• A CMS-2746 ESRD Death Notification form is completed when a patient dies.</li><li>• Copies of the printed and signed CMS-2728 form and the printed CMS-2746 form are kept in the patient's medical record.</li></ul>
<b>Frequency</b>	<p>Tier 1 CROWNWeb Data Managers:</p> <ul style="list-style-type: none"><li>• Submit Initial CMS-2728 forms within 10 business days of Date Regular Chronic Dialysis Began (field 24 of CMS-2728 form) for ESRD patients at Medicare-certified dialysis facilities, but no later than 45 days.</li><li>• Submit CMS-2746 forms within 14 days of the date of death.</li></ul> <p>Tier 2 CROWNWeb Data Managers:</p> <ul style="list-style-type: none"><li>• Submit Initial CMS-2728 forms within 5 business days of notification.</li><li>• Submit CMS-2746 forms for Medicare-certified kidney transplantation and VHA facilities within 5 business days of notification of the date of death.</li></ul> <p>Tier 3 CROWNWeb Data Managers:</p> <ul style="list-style-type: none"><li>• Support Tier 1 and Tier 2 CROWNWeb Data Managers by deleting and/or modifying CMS-2728 forms within 10 business days of assignment to the Tier 3 Data Manager.</li><li>• Support Tier 1 and Tier 2 CROWNWeb Data Managers by deleting CMS-2746 forms within 5 business days of assignment to the Tier 3 Data Manager.</li></ul>
<b>How To</b>	<p>Visit <a href="http://mycrownweb.org/pcw_course/completing-cms-2728-form">http://mycrownweb.org/pcw_course/completing-cms-2728-form</a> for instructions on how to complete a CMS-2728 form in CROWNWeb.</p> <p>Visit <a href="http://mycrownweb.org/pcw_course/completing-cms-2746-form">http://mycrownweb.org/pcw_course/completing-cms-2746-form</a> for instructions on how to complete a CMS-2746 form in CROWNWeb.</p>

# CROWNWeb Data Management Guidelines

## PART Verification

<b>Key Points</b>	<ul style="list-style-type: none"><li>• PART data are a set of patient personal and treatment history information obtained from data entered on the <i>Admit/Discharge</i>, <i>Patient Attributes</i>, and <i>Dialysis Treatment Information</i> screens.</li><li>• CROWNWeb allows Tier 1 users to set a filter of “No PART &gt; 30 Days” to display only patients who still have not been verified in 30+ days.</li><li>• The PART tool is used to verify four key pieces of patient information/activity every 30 days:<ul style="list-style-type: none"><li>○ Patient census</li><li>○ Admit/discharge status (including transient status)</li><li>○ Current treatment information</li><li>○ Current attending physician</li></ul></li></ul>
<b>Frequency</b>	Tier 1 CROWNWeb Data Managers perform a PART Verification for all patients by the 5th business day of each month.
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/verifying-part-data">http://mycrownweb.org/pcw_course/verifying-part-data</a> for instructions on how to view and verify PART data in CROWNWeb.

Figure 16: PART Verification in CROWNWeb.

Search	Verify	Display Results Per Page 50					
<input type="checkbox"/> All/None	<b>Patient Name</b> ▲	<b>DOB (age)</b>	<b>Admit/Discharge</b>	<b>Treatment</b>	<b>Transient</b>	<b>Physician</b>	<b>Verification</b>
<input checked="" type="checkbox"/>	<a href="#">One, This</a>	01/01/1940 (75)	<a href="#">07/01/2014 to Present</a>	<a href="#">Home Hemodialysis</a>	No	Doctor, Ima	
<input checked="" type="checkbox"/>	<a href="#">Bee, Bumble</a>	01/01/1980 (35)	<a href="#">05/01/2012 to Present</a>	<a href="#">Dialysis Facility/Center Hemodialysis</a>	No	Doctor, Ima	
<input checked="" type="checkbox"/>	<a href="#">Training, Trina</a>	01/04/1936 (79)	<a href="#">05/01/2014 to Present</a>	<a href="#">Dialysis Facility/Center Hemodialysis</a>	No	Doctor, Ima	
<input checked="" type="checkbox"/>	<a href="#">Jack, Jack</a>	01/01/1940 (75)	<a href="#">02/13/2015 to Present</a>	<a href="#">Dialysis Facility/Center Hemodialysis</a>	No	Doctor, Ima	
<input type="checkbox"/>	<a href="#">Jackets, Yellow</a>	01/01/1940 (75)	<a href="#">02/01/2011 to Present</a>	<a href="#">Dialysis Facility/Center Hemodialysis</a>	No	Doctor, Ima	
<input type="checkbox"/>	<a href="#">Tom, Fan</a>	06/11/1951 (64)	<a href="#">05/04/2012 to Present</a>	<a href="#">Dialysis Facility/Center Hemodialysis</a>	No	Doctor, Ima	06/06/2012 Training V6

# CROWNWeb Data Management Guidelines

## Resolve Gap Patients

<b>Key Points</b>	<ul style="list-style-type: none"><li>• Gap patients are individuals who:<ul style="list-style-type: none"><li>○ Are not currently associated with a facility and have not been re-admitted after a discharge</li><li>○ Have no death information associated with them</li></ul></li><li>• For a Gap patient to be resolved, he/she must either be admitted to the proper facility, or the necessary death information must be entered in CROWNWeb.</li><li>• Tier 3 CROWNWeb Data Managers support Tier 2 users by providing weekly Gap patient analysis reports.</li><li>• Tier 1 and Tier 2 CROWNWeb Data Managers work together to locate and resolve Gap patients.</li></ul>
<b>Frequency</b>	<p>Tier 1 CROWNWeb Data Managers resolve Gap patients within 2 business days of the weekly Gap Patients Report.</p> <p>Tier 2 CROWNWeb Data Managers communicate with Tier 1 CROWNWeb Data Managers weekly by providing Gap Patient Report to resolve Gap patients.</p>
<b>How To</b>	Visit <a href="http://mycrownweb.org/pcw_course/working-with-gap-patients">http://mycrownweb.org/pcw_course/working-with-gap-patients</a> for instructions on how to resolve Gap patients in CROWNWeb.

## Personnel

### Add/Edit Key Personnel

<b>Key Points</b>	<ul style="list-style-type: none"> <li>Key personnel, such as the Facility Medical Director, facility nephrologist, facility nurse manager, primary facility contact, and anyone who signs patient forms must be entered into CROWNWeb.</li> <li>Personnel entered in CROWNWeb display on other screens, such as: <div data-bbox="516 567 993 730"> <div>Facility Attestation</div> <div>Treatment Summary</div> <div>CMS-2728</div> <div>CMS-2746</div> </div> </li> <li>Tier 1 CROWNWeb Data Managers review and “Inactivate Records” as needed.</li> <li>ESRD stakeholders utilize personnel data in CROWNWeb for various communications and approvals.</li> </ul>
<b>Frequency</b>	<p>Tier 1 CROWNWeb Data Managers add/edit key staff members on the <i>Personnel</i> screen of in-scope Medicare-certified dialysis facilities within 5 business days of staff changes.</p> <p>Tier 2 CROWNWeb Data Managers add/edit key staff members on the <i>Personnel</i> screen of in-scope Medicare-certified kidney transplantation and VHA facilities within 5 business days of notification of staff changes.</p>
<b>How To</b>	<p>Visit <a href="http://mycrownweb.org/pcw_course/adding-facility-personnel">http://mycrownweb.org/pcw_course/adding-facility-personnel</a> for instructions on how to add and edit facility personnel in CROWNWeb.</p>

Figure 17: Add/Edit Personnel Options in CROWNWeb.



## Clinical

### Manage Clinical

#### Key Points

- Clinical data, collected per patient once per month via CROWNWeb, support:
  - The CMS Quality Strategy
  - The ESRD QIP
  - The CMS Triple Aim

- CROWNWeb clinical data include data on management of:

Anemia Management	Iron
Dialysis Adequacy	Fluid Weight
Mineral Metabolism	Hospitalization
ESA	Vaccination
Infection	

- Tier 1 CROWNWeb Data Managers report clinical data directly to CMS by either manually entering lab results and other clinical data into CROWNWeb or electronically through batch submission.
- Tier 1 CROWNWeb Data Managers report the last lab of the month for hemodialysis and peritoneal dialysis patients or indicate “Not Available” when applicable.
- Tier 1 CROWNWeb Data Managers report the vascular access type used for each patient during his or her last dialysis treatment during a Clinical Month.

#### Frequency

Tier 1 CROWNWeb Data Managers follow CMS’ Clinical Data Submission Schedule, accessible via <http://mycrownweb.org/crownweb-clinical-months-to-close-monthly-in-2015>.

#### How To

Visit [http://mycrownweb.org/pcw\\_course/managing-patient-clinical-values](http://mycrownweb.org/pcw_course/managing-patient-clinical-values) for instructions on how to manage clinical data entry in CROWNWeb.

## Action List

### Resolve Action List Notifications and Accretions

#### Key Points

- CROWNWeb communicates with REMIS to receive Notification and Accretion alerts to support data reporting accuracy.
- Notifications and Accretions are created when differences are identified between the two databases.
- CROWNWeb has two types of Notifications:

<b>REMIS Identity Notification</b>	Identifies differences in a patient's identity (i.e., first name, last name, date of birth, gender, Medicare Claim Number, and Social Security Number).
<b>REMIS Event Notification</b>	Identifies any treatment differences in modality, or REMIS has received notice that the patient has died.

- CROWNWeb has one type of Accretion:

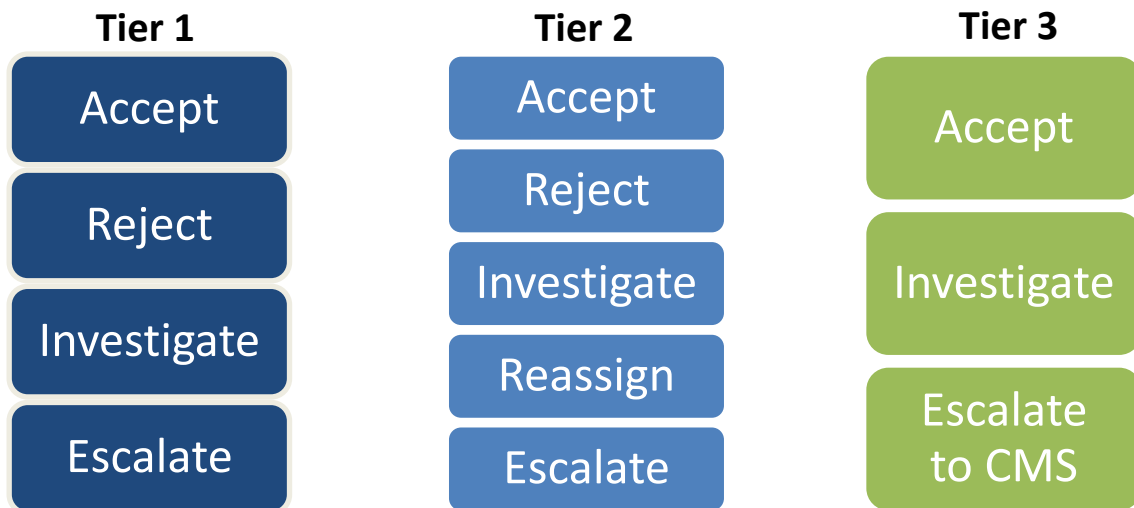
<b>REMIS Accretion</b>	Identifies a patient who exists in REMIS, but is not assigned to a facility in CROWNWeb.
------------------------	--

- Notifications and Accretions are:
  - Assigned to Tier 1 CROWNWeb Data Managers directly from REMIS or “Reassigned” by Tier 2 users.
  - Assigned to Tier 2 CROWNWeb Data Managers directly from REMIS, “Reassigned” by another Tier 2 user, or “Escalated” by a Tier 1 user.
    - Tier 2 CROWNWeb Data Managers are responsible for resolving Notifications and Accretions for VHA, kidney transplantation, and closed facilities. Tier 2 CROWNWeb Data Managers are responsible for reassigning or escalating out-of-scope patients or Gap patients in CROWNWeb.
  - Assigned to Tier 3 CROWNWeb Data Managers directly from REMIS or “Escalated” by Tier 2 users to reconcile ESRD systems.

## CROWNWeb Data Management Guidelines

<b>Frequency</b>	<p>ALL CROWNWeb Data Managers use CROWNWeb to resolve open Notifications and Accretions.</p> <table border="1" data-bbox="505 302 1427 602"> <thead> <tr> <th data-bbox="505 302 893 375">Resolution Period</th><th data-bbox="893 302 1427 375"></th></tr> </thead> <tbody> <tr> <td data-bbox="505 375 893 489"><b>15 Days</b></td><td data-bbox="893 375 1427 489">Newly generated or “Reassigned” Notifications and Accretions</td></tr> <tr> <td data-bbox="505 489 893 602"><b>30 Days</b></td><td data-bbox="893 489 1427 602">“Under Investigation” Notifications and Accretions</td></tr> </tbody> </table>	Resolution Period		<b>15 Days</b>	Newly generated or “Reassigned” Notifications and Accretions	<b>30 Days</b>	“Under Investigation” Notifications and Accretions
Resolution Period							
<b>15 Days</b>	Newly generated or “Reassigned” Notifications and Accretions						
<b>30 Days</b>	“Under Investigation” Notifications and Accretions						
<b>How To</b>	<p>Tier 1: Visit <a href="http://mycrownweb.org/pcw_course/notifications-accretions-facility-role">http://mycrownweb.org/pcw_course/notifications-accretions-facility-role</a> for instructions on how to resolve Action List discrepancies in CROWNWeb.</p> <p>Tier 2: Visit <a href="http://mycrownweb.org/pcw_course/notifications-accretions-network-role">http://mycrownweb.org/pcw_course/notifications-accretions-network-role</a> for instructions on how to resolve Action List discrepancies in CROWNWeb.</p>						

Figure 18: Actions taken by CROWNWeb Data Managers to Resolve Notifications and Accretions.



## Form 2744

### Add New CMS-2744A Forms (Dialysis Facilities)

<b>Key Points</b>	<ul style="list-style-type: none"> <li>The CMS-2744 form is the annual ESRD Facility Survey designed to support data pertaining to: <ul style="list-style-type: none"> <li>Treatment trends</li> <li>Utilization of services</li> <li>Patterns of practice in treating ESRD patients</li> </ul> </li> <li>CMS-2744A forms are completed for Medicare-certified dialysis facilities that capture facility, treatment, and staffing data for the survey year (January 1 – December 31).</li> <li>All patient admissions and discharges and treatment information are entered in CROWNWeb for the survey year.</li> </ul>
<b>Frequency</b>	Tier 1 CROWNWeb Data Managers complete CMS-2744A forms at the start of each year for the prior year and submit via CROWNWeb by the CMS due date.
<b>How To</b>	<p>Tier 1: Visit <a href="http://mycrownweb.org/pcw_course/completing-the-cms-2744-form">http://mycrownweb.org/pcw_course/completing-the-cms-2744-form</a> for instructions on how to complete the CMS-2744 form in CROWNWeb.</p> <p>Tier 2: Visit <a href="http://mycrownweb.org/pcw_course/cms-2744-network">http://mycrownweb.org/pcw_course/cms-2744-network</a> for instructions on how to complete the CMS-2744 form in CROWNWeb.</p>

Figure 19: Add a New Form 2744 Option in CROWNWeb.

QualityNet  
Logged in as: crownWeb\SB0002  
Session expires in 12:57

Home Facilities Patients Personnel Reports My Reports Clinical Form 2744 Action List Admin

Search 2744 Add New 2744 Missing 2744 Forms Status Change Updates

Search 2744 > Add New 2744

Add a New Form 2744

Add a New Form 2744 Search Criteria

Facility CCN

Facility NPI  Go

\*Facility DBA Name Select One

\*Survey Year 2015

Add Reset



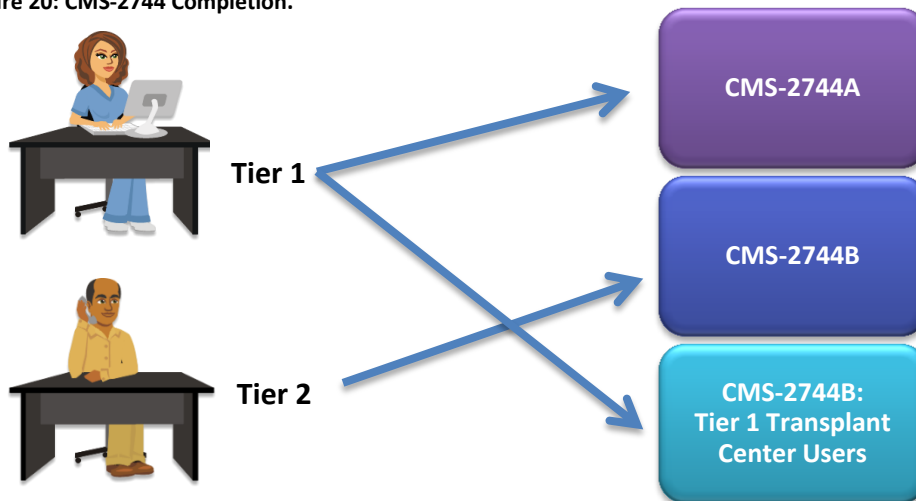
# CROWNWeb Data Management Guidelines

## Add New CMS-2744B Forms (Kidney Transplantation Facilities)

<b>Key Points</b>	<ul style="list-style-type: none"><li>• CMS-2744B forms are completed for Medicare-certified kidney transplantation centers to capture data regarding patients' kidney transplant eligibility, the number of kidney transplants performed, and the number of patients awaiting kidney transplant during the survey year (January 1 – December 31).</li><li>• Tier 1 CROWNWeb Data Managers at kidney transplantation centers are authorized to complete CMS-2744B forms for facilities within their scope.*</li><li>• Tier 2 CROWNWeb Data Managers complete CMS-2744B forms for kidney transplantation centers that do not have CROWNWeb access.</li></ul>
<b>Frequency</b>	Tier 1 and Tier 2 CROWNWeb Data Managers complete CMS-2744B forms at the start of each year for the prior year and submit via CROWNWeb by the CMS due date.
<b>How To</b>	Tier 2: Visit <a href="http://mycrownweb.org/pcw_course/cms-2744-network">http://mycrownweb.org/pcw_course/cms-2744-network</a> for instructions on how to complete the CMS-2744 form in CROWNWeb.

\*Tier 1 CROWNWeb Data Managers at kidney transplantation centers have limited access in CROWNWeb. However, they are authorized to complete the CMS-2744B form in CROWNWeb.

Figure 20: CMS-2744 Completion.



# CROWNWeb Data Management Guidelines

## Accept/Reject/Finalize CMS-2744 Forms

<b>Key Points</b>	<ul style="list-style-type: none"><li>• Tier 1 and Tier 2 CROWNWeb Data Managers work together to complete CMS-2744 forms in CROWNWeb once a year for each Medicare-certified dialysis and kidney transplantation facility.</li><li>• Users must resolve CMS-2744 errors before attempting to “Submit for Acceptance.” The form is complete once it is “Finalized.”</li><li>• CMS-2744 forms are “Accepted” or “Rejected” and “Finalized” by Tier 2 CROWNWeb Data Managers.</li><li>• Tier 2 CROWNWeb Data Managers attest that all facilities within their scope have completed the CMS-2744 forms by the CMS due date.</li></ul>
<b>Frequency</b>	Tier 2 CROWNWeb Data Managers review, and “Accept” and “Finalize” or “Reject” CMS-2744 forms within 30 calendar days of the form being “Submitted for Acceptance” by a facility.
<b>How To</b>	Tier 2: Visit <a href="http://mycrownweb.org/pcw_course/cms-2744-network">http://mycrownweb.org/pcw_course/cms-2744-network</a> for instructions on how to complete the CMS-2744 form in CROWNWeb.

Figure 21: CMS-2744 Status Descriptions.

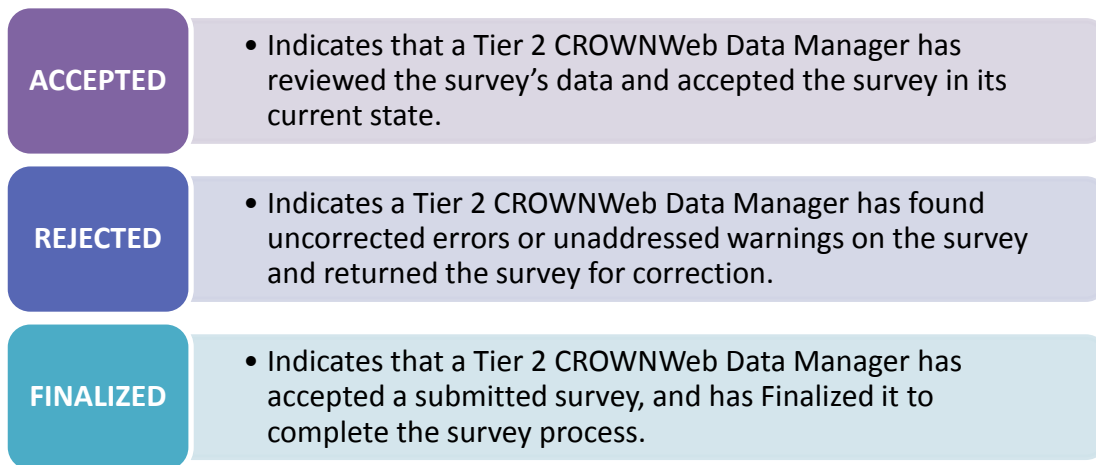
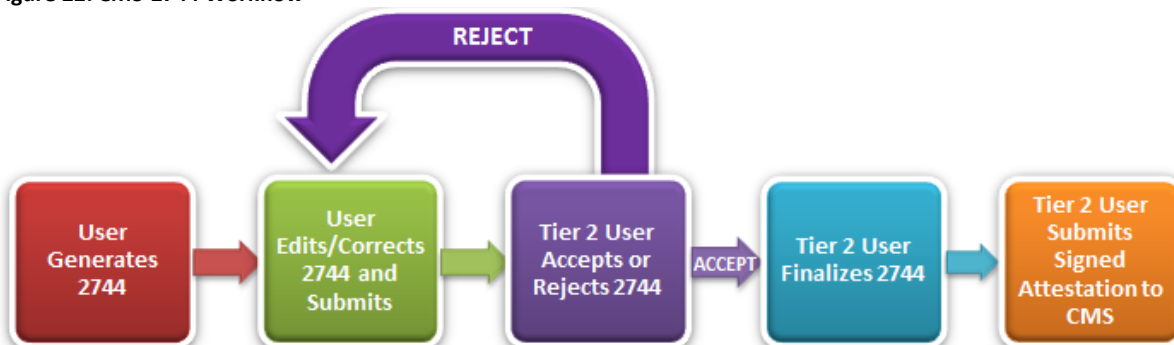


Figure 22: CMS-2744 Workflow



# CROWNWeb Data Management Guidelines

## Add New CMS-2744A Forms for Closed Facilities

<b>Key Points</b>	<ul style="list-style-type: none"><li>• A Tier 1 CROWNWeb Data Manager may complete the CMS-2744A form if the facility is in the process of closing.</li><li>• Tier 1 CROWNWeb Data Managers ensure that all patient, patient admission and discharge, and treatment information are entered into CROWNWeb before submitting a CMS-2744A form.</li></ul>
<b>Frequency</b>	Tier 1 CROWNWeb Data Managers submit CMS-2744A forms for acceptance within 5 business days prior to closure of the facility.
<b>How To</b>	Tier 1: Visit <a href="http://mycrownweb.org/pcw_course/completing-the-cms-2744-form">http://mycrownweb.org/pcw_course/completing-the-cms-2744-form</a> for instructions on how to complete the CMS-2744 form in CROWNWeb.

Figure 23: Add a New Form 2744 Option in CROWNWeb.

The screenshot displays the 'Add a New Form 2744' page in the CROWNWeb application. The top navigation bar includes links for Home, Facilities, Patients, Personnel, Reports, My Reports, Clinical, Form 2744, Action List, and Admin. The 'Form 2744' section is active, showing options for Search 2744, Add New 2744, Missing 2744 Forms, and Status Change Updates. The 'Add New 2744' option is selected, leading to the 'Add a New Form 2744 Search Criteria' form. This form contains the following fields:

- Facility CCN:
- Facility NPI:
- \*Facility DBA Name:
- \*Survey Year:

At the bottom of the form are 'Add' and 'Reset' buttons. The page also shows a 'Log Off' link and a session expiration time of 12:57.



# Chapter 4

## Tier 3 CROWNWeb Data Management Support



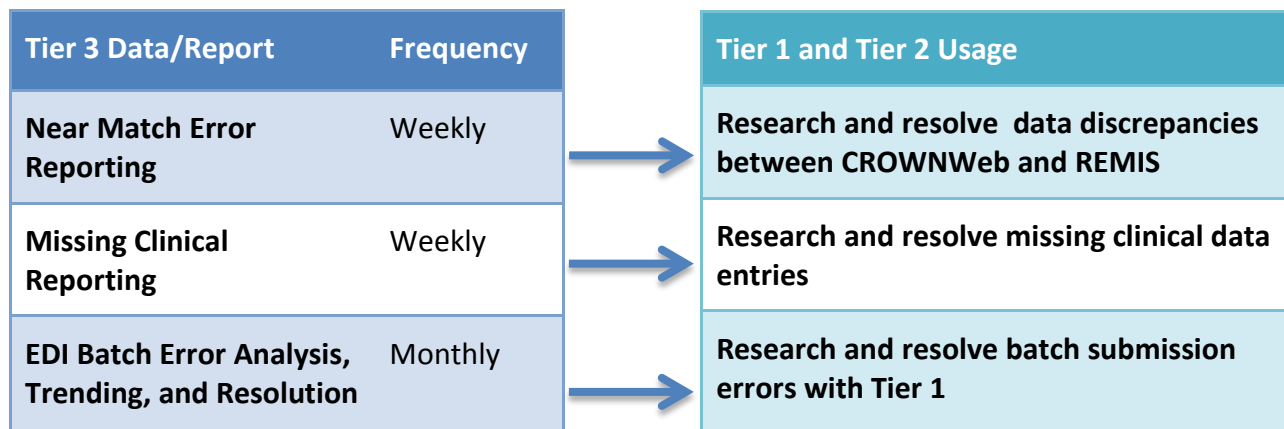
## Tier 3 CROWNWeb Data Manager Role

### Role Defined

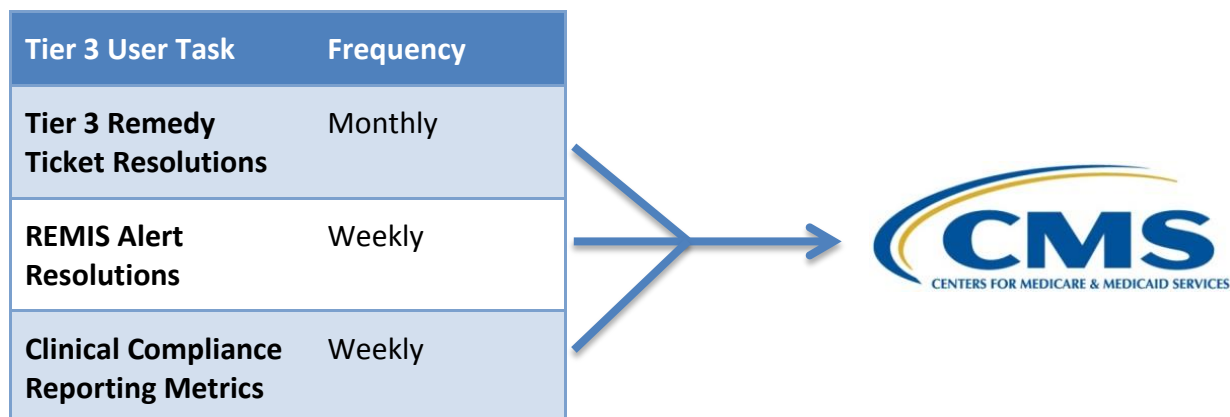
Tier 3 CROWNWeb Data Managers support CROWNWeb **Data Monitoring**, **Data Measuring**, and **Data Managing** by using the CROWNWeb system to acquire and report necessary data to CMS. Additionally, Tier 3 CROWNWeb Data Managers provide support to Tier 1 and Tier 2 users by providing reports and other documentation that provide an overview of data entries.

Examples of Tier 3 CROWNWeb data management support:

### Data Monitoring



### Data Measuring



## CROWNWeb Data Management Guidelines

### Data Managing

Tier 3 User Task	Frequency
<b>2728 Form Deletion and Modification</b>	10 business days after assignment to the Tier 3 Data Manager
<b>2746 Form Deletion</b>	5 business days after assignment to the Tier 3 Data Manager
<b>Erroneous Patient Deletion</b>	5 business days after assignment to the Tier 3 Data Manager
<b>Acute Patient Maintenance</b>	5 business days after assignment to the Tier 3 Data Manager
<b>Patient Merge</b>	10 business days after assignment to the Tier 3 Data Manager
<b>Patient Unmerge</b>	5 business days after assignment to the Tier 3 Data Manager
<b>Reopen 2744 Forms</b>	5 business days after assignment to the Tier 3 Data Manager

## Appendixes

### CROWNWeb Facility-Level Reports

Facility-Level Reports	
Report	Definition
<b>Facility Reports</b>	
<b>Facility Personnel Report</b>	Allows users to run and print a report that includes facility details including location, status, shifts, and services. It also provides a detailed list of all personnel associated with the selected facility including full name, position, UPIN, email, and contact information for selected in-scope facilities.
<b>Patient Report</b>	
<b>Patient Roster Report</b>	Allows users to run and print a report that includes all patients present at the selected facility(ies) within the user scope as of a specific date or date range.
<b>Audit Reports</b>	
<b>Audit Forms Report</b>	Allows users to run and print a report for 2728, 2746, or both form types submitted by specified facilities within an entered date range.
<b>Audit Additions Report</b>	Allows users to run and print a report by module(s) to show any newly submitted records within the selected module(s) by specified facilities within an entered date range.
<b>Audit Deletions Report</b>	Allows users to run and print a report by module(s) to show any deleted records within the selected module(s) by specified facilities within an entered date range.
<b>Audit Updates Report</b>	Allows users to run and print a report by module(s) to show any updated records within the selected module(s) by specified facilities within an entered date range.
<b>Clinical Performance Measures (CPMs) Reports</b>	
<b>ESRD CPM Hemodialysis Summary Report</b>	Allows users to run, view, and print a report for a specified reporting period end month and year. The reporting period for this report is three

## CROWNWeb Data Management Guidelines

	months. The report provides percentages of patients meeting each measure and number of patients considered for each measure at the Facility, State, Network, and National levels.
<b>ESRD CPM Peritoneal Dialysis Summary Report</b>	Allows users to run, view, and print a report for a specified reporting period end month and year. The reporting period for this report is six months. The report provides percentage of patients meeting each measure and number of patients considered for each measure at the Facility, State, Network, and National levels.
<b>Quality Improvement Reports</b>	
<b>ESRD Fistula First Summary Report</b>	Allows users to run, view, and print a report for a specified reporting period end month and year. The reporting period for this report is one month. The report provides number of patients considered for the measures or percentage of patients meeting the measures at the Facility, Network, and National levels.
<b>Vascular Access Reports</b>	
<b>Vascular Accesses in Use Report</b>	Displays the count and percentage of each type of vascular access used at a selected facility for a user-defined date range. The user has the ability to select various report layouts to compare data by either Month or Facility/State/Network/Nation. In addition, the report provides the user with the ability to view patient information for patients included in the facility level counts. <b>Note:</b> This report also includes a graph displaying a high-level summary of the data.
<b>Fistula Rates Comparison Report</b>	Displays the count and percentage of AV fistulas (2 needles) used at a specific facility for a user-defined date range. In addition, the report includes State, Network, and National data for comparison. <b>Note:</b> This report includes a graph displaying a high-level summary of the data.
<b>Vascular Accesses Maturing Report</b>	Displays the count and percentage of AV fistulas maturing and patients with AV grafts maturing at a specific facility for a user-defined date range. The user has the ability to select various report layouts to compare data by either Month or



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	Facility/State/Network/Nation. In addition, the report provides the user with the ability to view patient information for patients included in the facility-level counts.
<b>Vascular Assessment Prior to Initiation of Dialysis Report</b>	Displays initial patient data that was used to populate the CMS-2728 form for patients at a specific facility during a user-defined date range. The user has the ability to select various report layouts to compare data by either Month or Facility/State/Network/Nation. In addition, the report provides the user with the ability to view patient information for patients included in the facility-level counts. <b>Note:</b> Patients with an initial 2728 form prior to March 1995 will not be included in the report.
<b>Access Data Missing In CROWNWeb Report</b>	Displays a list of all patients admitted to the selected facility who do not have vascular access data entered into CROWNWeb.
<b>Notification and Accretions Reports</b>	
<b>Open Accretions Report</b>	Lists discrepancies supplied by REMIS that need to be researched. The report shows all open Accretions for a specific facility.
<b>Open Notifications Report</b>	Lists discrepancies supplied by REMIS that need to be reconciled to the data in CROWNWeb. The report shows all open Notifications for a specific facility.
<b>Accretion Data History Report</b>	Shows the original data from the Accretion.
<b>Notification Data History Report</b>	Shows the original data from the Notification.

## CROWNWeb Network-Level Reports

Network-Level Reports	
Report	Definition
<b>Patient Reports</b>	
<b>Clinical Data and Missing Labs Report</b>	Identifies the percentage of patients whose clinical results fall within, or outside, a specified range and missing clinical and lab data.
<b>Duplicate Patients Report</b>	Identifies patients in CROWNWeb with transposed names or near match names and Social Security Numbers.
<b>Patient Events Report</b>	Identifies all patient events in CROWNWeb.
<b>Patient Population Report</b>	Identifies the patient population count of a facility on the last day of the month.
<b>Unverified PART Report</b>	Identifies facilities that have not updated their PART in 30 days or more.
<b>Vascular Access Report</b>	Identifies patients' current vascular access, any change in vascular access, and the data the access type changed.
<b>Gap Patients Report</b>	Identifies patients in CROWNWeb who are not assigned to a facility.
<b>Transient Patients Report</b>	Identifies patients currently admitted to two separate facilities and in transient status beyond 30 days by facility.
<b>Merged Patients Report</b>	Identifies patients in CROWNWeb who were inadvertently entered into the CROWNWeb system twice, and were subsequently merged into one unique patient.
<b>Patient Self Reporting Report</b>	Indicates the number of New to ESRD patients who self-reported race and ethnicity.
<b>Facility Reports</b>	
<b>Mailing Labels Report</b>	Identifies and sorts patient, facility, and personnel address information to create mailing labels.
<b>Missing Forms Report</b>	Identifies CMS-2728 and CMS-2746 forms that have not been completed, based on the patient treatment information.
<b>Saved Status Report</b>	Identifies all forms that are in a Saved status.
<b>Personnel Data Report</b>	Identifies facility contact information.

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### Annual Reports

<b>ESRD Incidence</b>	A count of New to ESRD patients.
<b>ESRD Dialysis Prevalence</b>	A count of all dialysis patients.
<b>Dialysis Patients Modality and Setting - Home Report</b>	A count of all patients receiving Home Dialysis Treatment.
<b>Dialysis Patients Modality and Setting - In Center Report</b>	A count of all patients receiving In-Center Dialysis Treatment.
<b>All Renal Transplant Patients Report</b>	A count of all renal transplants performed.
<b>Renal Transplant Recipient Report</b>	A count of renal transplant recipients.
<b>Dialysis Death Report</b>	A count of deaths of dialysis patients.
<b>Vocational Rehabilitation Report</b>	A count of all patients ages 18–54 years who are receiving vocational rehabilitation services.

### Vascular Access Reports

<b>Network Vascular Accesses in Use Report</b>	Displays the count and percentage of each type of vascular access used in the Network's service area for a user-defined date range. The user has the ability to select various report layouts to compare data by either Month, Facility/Network/Nation or State within the Network area. In addition, the report provides the user with the ability to view a summary of facility data, as well as the patient information included in the facility-level data.
<b>Network Accesses in Use by Affiliation Report</b>	Displays the count and percentage of each type of vascular access used in the Network's service area by Affiliation for a user-defined data range. In addition, the report provides the user with the ability to view a summary of facility data, as well as the patient information included in the facility-level data.
<b>Accesses in Use for All States Report</b>	Displays the percentage of each vascular access type in use for every state and territory for a date range.
<b>Accesses in Use for All Networks Report</b>	Displays the percentage of each type of vascular access in use for every Network for a user-defined date range.

# CROWNWeb Data Management Guidelines

## Tier 1 CROWNWeb Data Manager Task List

Category	Section	Task in CROWNWeb	Frequency
<b>Data Monitoring</b>	<b>Facilities</b>	Monitor Facility Attestation	By January 31 of each year
		Monitor Facility Details	By December 31 of each year
	<b>Personnel</b>	Review Personnel	At least quarterly
	<b>Reports</b>	Generate Missing Forms and Saved Status Reports	At least monthly
<b>Data Measuring</b>	<b>Reports</b>	Generate Open Accretions Report	Monthly
		Generate Open Notifications Report	Monthly
<b>Data Managing</b>	<b>Facilities</b>	Submit Facility Attestations	January 1–31 of each year
		Update Facility Details	At least annually
	<b>Patients</b>	Admit and Discharge Patients	Admit within 5 business days of first treatment; Discharge within 5 business days of last treatment
		Admit and Discharge Transient Patients	Admit within 1 business day of treatment; Discharge within 1 business day of last treatment
		Complete CMS-2728 and CMS-2746 Forms	CMS-2728: within 10 business days of Date Regular Chronic Dialysis Began; no later than 45; CMS-2746: within 14 days of the date of death
		PART Verification	By 5th business day of each month
		Resolve Gap Patients	Within 2 business days of the weekly report
	<b>Personnel</b>	Add Key Personnel	Within 5 business days of staff changes
	<b>Clinical</b>	Manage Clinical	Follow CMS' Clinical Data Submission Schedule
	<b>Action List</b>	Resolve Notifications and Accretions	New or Reassigned: within 15 days of issuance; Under Investigation: within 30 days of issuance
	<b>Form 2744</b>	Add New CMS-2744A Forms	By CMS due date
		Add New CMS-2744B Forms	By CMS due date
		Add New CMS-2744A Forms for Closed Facilities	Within 5 business days prior to closure

## CROWNWeb Data Management Guidelines

### Tier 2 CROWNWeb Data Manager Task List

Category	Section	Task in CROWNWeb	Frequency
Data Monitoring	Facilities	Monitor Facility Attestation	Weekly in January of each year
		Monitor Facility Details	By December 31 of each year
		Monitor Saved Facilities	By 1st business day of each month
	Reports	Generate Duplicate Patients Report	Monthly
		Generate Missing Forms and Saved Status Report	At least monthly
		Generate Transient Patients Report	Monthly
		Generate Unverified PART Report	By 1st business day of each month
	Data Measuring	Reports	Generate Clinical Data and Missing Labs Report
Generate Open Accretions Report			Monthly
Generate Open Notifications Report			Monthly
Data Managing	Facilities	Add Facility in CROWNWeb	Within 1 business day of receiving the facility’s CMS Certification Letter
		Update Facility Details	At least annually
	Patients	Admit and Discharge Patients	Admit within 2 business days of notification; Discharge within 2 business days of last treatment notification
		Complete CMS-2728 and CMS-2746 Forms	CMS-2728: within 5 business days of notification; CMS-2746: within 5 business days of notification
		Resolve Gap Patients	Weekly
	Personnel	Add Key Personnel	Within 5 days of notification of staff changes
	Action List	Resolve Notifications and Accretions	New or Reassigned: within 15 days of issuance; Under Investigation: within 30 days of issuance
	Form 2744	Add New CMS-2744B Forms	By CMS due date
		Accept/Reject/Finalize CMS-2744 Forms	Within 30 calendar days of a form being “Submitted for Acceptance”

## CROWNWeb Data Management Guidelines

### Tier 3 CROWNWeb Data Manager Task List

Category	Section	Task in CROWNWeb	Frequency
<b>Data Monitoring</b>	<b>Facilities</b>	Monitor Facility Attestation	Weekly in January of each year
	<b>Reports</b>	Generate Duplicate Patients Report	Monthly
<b>Data Measuring</b>	<b>Reports</b>	Generate Clinical Data and Missing Labs Report	Monthly
		Generate Open Accretions Report	Monthly
		Generate Open Notifications Report	Monthly
<b>Data Managing</b>	<b>Patients</b>	Delete or Modify CMS-2728 and Delete CMS-2746 Forms	CMS-2728: within 10 business days of notification; CMS-2746: within 5 business days of notification
	<b>Action List</b>	Resolve Notifications and Accretions	New or Reassigned: within 15 days of issuance; Under Investigation: within 30 days of issuance