

CMS-2744 Guide

This guide provides information on how to complete the CMS-2744 form in the CROWNWeb system.

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12/17/2018

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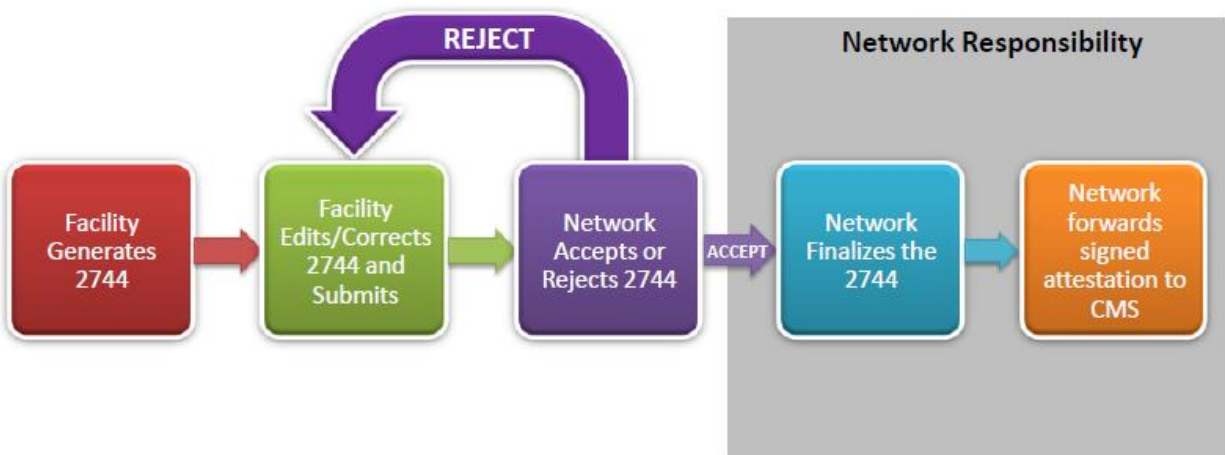
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Overview

The CMS-2744 Annual Facility Survey summarizes Medicare dialysis facility data for the previous calendar year. The survey includes admits, discharges, treatments, modalities and staff numbers. The expectation is for facilities to generate the form by January 14, 2019 and submit without errors and/or comment on all warning by **March 29, 2019**.

There are several steps to successfully complete the CMS 2744 Annual Facility Survey. This Guide provides information on how to navigate the process and successfully complete the Annual Facility Survey. Below is a flow diagram of the CMS-2744 process.



Below are the steps involved in completing the CMS-2744 Annual Facility Survey.

- [Identify 2744 Lead Contact](#)
- [Verify the PART](#)
- [Verify Patient Roster Report](#)
- [Gather Treatment and Staffing Data](#)
- [Add or Generate CMS-2744](#)
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- [Work With Excel Reports to Resolve Errors and Make Corrections](#)
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Identity 2744 Lead Contact

Each facility must identify the lead and alternate lead for the CMS 2744 process. Click [here](#) to notify the Network of the lead and alternate lead. The lead person must have access to CROWNWeb and editor role. The Editor role allows the user to generate the form 2744, enter the treatment and staffing information, resolve errors and warnings, and submit the form to the Network. Click [here](#) for CROWNWeb registrations steps via the EIDM system.

Schedule Appointment

The Network will assist facilities via an appointment to complete the form 2744. If you require assistance with the form 2744 you must schedule an appointment. **The Network will not return phone calls related to the form 2744.** Click [here](#) to schedule your appointment.

Resolve Corporate Error Reports

If your facility is affiliated with DaVita, DCI, Fresenius or NRAA resolve any errors on the corporate reports provided to you. If you have questions about the errors on the report contact your corporate help desk for assistance. The Network does not have access to corporate reports.

Verify PART

Verify the facility PART for every patient. Verify the patient name, DOB, admit and discharge date, treatment information and transient status. Click [here](#) for printed instructions on how to verify the PART. Click [here](#) for a video tutorial on how to verify the PART. The video name is "PART FOCUSED Workshop."

Verify Patient Roster Report

Generate the Patient Roster from January 1, 2018 to December 31, 2018. The report provides a list of all patients admitted and discharged to the facility for 2018. Verify that all patients admitted and discharged for the year are listed on the report. If patients are missing admit or discharge them as appropriate. Below are the steps to generate the Patient Roster Report.

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Log into CROWNWeb

Click the reports tab

Enter Report Criteria

- Start date: 01/01/2018
- End Date: 12/31/2018
- Select facility
- Tolerance Faction: 0
- Order: Patient Name
- Exclude Address and Phone Number: Yes
- Click Finish
- Click OK, My Reports screen opens
- Click report type (may take several minutes for report to generate)
- Dialogue box opens
- Click open

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Gather Treatment Numbers and Staffing Information

The following information is needed to complete the form 2744. Gather this information and have it available when you generate the CMS-2744. It will make it easy to enter the data once you generate the form. Click [here](#) for CMS-2744 with instructions and definitions.

- Fields 32-35 vocational rehabilitation information
- Fields 36-37 treatment information
- Fields 38-41 staffing information

Add or Generate CMS-2744

Once the facility reviews the CMS-2744 training materials, verifies the PART and Patient Roster they may generate the CMS-2744 survey. Below are the steps to add/generate the CMS-2744.

Log into CROWNWeb

Click Form 2744

Click **Add New 2744**. The *Add a New Form 2744* screen displays

If necessary, enter the **Facility CCN** or the **Facility NPI**. Click **Go**

The **Facility DBA Name** field drop-down list auto-populates
If it does not auto-populate select the desired **Facility DBA Name**

Select the desired **Survey Year** from the drop-down list (use 2016)

Click **Add**. The *Add 2744 for <facility> for Survey Year <yyyy>* screen displays

Click **Generate** to generate a count. The **"Form 2744 – GENERATED"** message displays. The patient portion is populated with information from the CROWNWeb database.

Click **Save**. The message **"Form 2744 – SAVED."** displays

You have successfully generated the form 2744

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Review and Resolve System Discharges

A system discharge occurs when a facility admits a patient prior to your facility discharging the patient. The system automatically discharges the patient with the discharge reason system discharge from your facility. Follow the below steps to resolve system discharges.

NOTE: Batch submitting organizations must contact the corporate help desk for assistance on how to resolve system discharges. Non batch submitting organizations can follow the below steps.

Log into CROWNWeb

Click Form 2744

Click search 2744

- Enter facility CCN
- Enter survey year = 2018
- Click search

Click on ID

CMS-2744 forms open

Click on Additions During Survey Period Report

Filter row 3

Find the discharge reason field and filter for system discharges

Patients with a discharge reason of system discharge display on the Excel spreadsheet

Look up the patient in CROWNWeb, using the CROWN UPI and review the admit/discharge summary. If the discharge date is accurate simply change the system discharge to transfer out. If the date is incorrect you may have to contact the admission facility to resolve the issue.

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Review and Resolve Duplicate Patients

There are times when the same patient may be admitted to a facility twice and duplicate records are created. Duplicate records may cause errors on the CMS-2744. Below are the steps to find and resolve duplicate patients.

On the View 2744 screen, click Additions During Survey Period Report

Filter row 3

On the patient name field sort A to Z

Review the list to find duplicate patients

Note the Patient ID for the patients

Contact your local Network, if you discover that the same patient has two different Patient IDs.

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Populate CMS-2744 Data Entry Fields

Once the CMS-2744 is generated most of the fields are populated based on data in the CROWNWeb system. There are 3 fields that require user responses. The user response fields are questions 36-41. For information on the definitions for the fields please review the [CMS-2744 instructions](#). Below are steps on how to enter the information.

Log into CROWNWeb

Open the CMS-2744 form

Click edit

Enter the total number of hemodialysis treatments (field 36)

Enter the number of other treatments (field 37) These are typically, PD **training days** where exchanges were performed in-center. Do not report the number of PD exchanges.

Enter staffing information

Click save

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Work With Excel Reports to Resolve Errors and Make Corrections

The CROWNWeb system provides Microsoft Excel Reports to assist with identify errors. Three key steps must be performed when using Excel reports to find errors. The steps are:

1. Select the data row, right click and select delete
2. Select row 3 go to sort and filter in the top menu bar and select filter
3. Click on the drop down arrow and make a selection in the text filters to select how you want to sort the data in the column, click OK when finished

NOTE: [Project CROWNWeb materials](#) contain picture illustration on how to perform the above steps.

The Excel Reports are:

Additions During Survey Period: This report contains all patients dialyzing at the facility as of January 1, yyyy. Review the report to determine if any patients are missing. If patients are missing admit the patient according to the facility policy.

Patient Eligibility Status Report: This report contains all patients and the Medicare Enrollment status. Review the report for missing Medicare status and add the information to CROWNWeb.

Patients Receiving Care at End of Survey Period Report: This report contains all patients dialyzing at the facility as of December 31, yyyy. Review the Report to determine if any patients are missing. If patients are missing admit the patient according to the facility policy.

Patients Hemodialyzing More Than 4 Times Per Week: This report contains a list of patients dialyzing more than 4 times per week. Review the report for missing patients. If patients are missing update the last 2018 treatment record to indicate dialysis more than 4 times per week.

Vocational Rehabilitation Report: This report contains a list of all patients age 18-54. Review the list for the correct vocational rehabilitation data for the patient. If the information is incorrect make the changes on the patient attributes screen in CROWNWeb.

NOTE: Any changes to patient information require the CMS-2744 be re-generated. The form must be re-generated for the changes to appear on the form. To re-generate the form simply click the re-generate button at the bottom of the page.

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Resolving Treatment Record Issues

There are several treatment related issues that cause errors on the CMS 2744. The Network notifies the facility of the errors during the review process. The Network emails the person that generated the CMS 2744 the CROWN UPI of patients with treatment issues. Below is a list of the different types of treatment issues and instructions to resolve the errors.

Incomplete Training: Treatment record has a training type but the training start or end date is missing.

Log into CROWNWeb

Search for the Patient

Click on the CROWN UPI

Click admit/discharge summary on gray toolbar

Click on the appropriate admit date (indicated in the email from the Network) under the admit/discharge Summary

Click on treatment summary

Click on the appropriate treatment start date (indicated in the email from the Network)

Click edit treatment on the gray toolbar

Provide the correct type of dialysis training, dialysis training begin date and dialysis training end date (if the patient did not do dialysis training remove the type of dialysis training, leave the dialysis training start and end date blank)

Click submit

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Incomplete Treatment: Treatment record is incomplete. The required fields for the treatment record are:

- Treatment start date
- Primary Dialysis Setting
- Primary Type of Treatment
- Sessions Per Week
- Time Per Session
- Attending Practitioner
- Attending Practitioner UPIN
- If type of dialysis training populated must complete
 - Dialysis training begin date
 - Dialysis Training End Date

Log into CROWNWeb

Search for the Patient

Click on the CROWN UPI

Click admit/discharge summary on gray toolbar

Click on the appropriate admit date (indicated in the email from the Network) under the admit/discharge Summary

Click on treatment summary

Click on the appropriate treatment start date (indicated in the email from the Network)

Click edit treatment on the gray toolbar

Provide the required treatment fields listed above and noted in CROWNWeb with a red asterisk (*)

Click submit

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Misaligned Training: Occurs when the treatment record has a training type but the training start date is prior to the treatment start date.

Log into CROWNWeb

Search for the Patient

Click on the CROWN UPI

Click admit/discharge summary on gray toolbar

Click on the appropriate admit date (indicated in the email from the Network) under the admit/discharge Summary

Click on treatment summary

Click on the appropriate treatment start date (indicated in the email from the Network)

Click edit treatment on the gray toolbar

Change the training start date to the same date as the treatment admit date

Click submit

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Misaligned Treatment: Occurs when the treatment start date does not match the admit date.

Log into CROWNWeb

Search for the Patient

Click on the CROWN UPI

Click admit/discharge summary on gray toolbar

Click on the appropriate admit date (indicated in the email from the Network) under the admit/discharge Summary

Click on treatment summary

Click on the appropriate treatment start date (indicated in the email from the Network)

Click edit treatment on the gray toolbar

Change the treatment start date to the same date as the admit date

Click submit

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Missing Treatment: Occurs when the admit record does not have a treatment record.

Log into CROWNWeb

Search for the Patient

Click on the CROWN UPI

Click admit/discharge summary on gray toolbar

Click on the appropriate admit date (indicated in the email from the Network) under the admit/discharge Summary

Click on treatment summary

Click on the appropriate treatment start date (indicated in the email from the Network)

Click edit treatment on the gray toolbar

Add a treatment record (the treatment start date must be the same as the admit date)

Click submit

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Submit CMS-2744 to Network

Facilities are expected to follow all the steps in this document prior to submitting the CMS-2744 to the Network office. The CMS-2744 must not contain any errors. Please resolve all the errors or schedule an appointment before submitting the form. Below are the steps to successfully submit the form to the Network.

Click Submit for Acceptance at bottom of survey

At the confirm screen select yes

Message “Form 2744 has been successfully submitted to your in-scope network” received

Assist Network during the Network Review and Acceptance Stage

If you do not schedule an appointment to complete the form 2744 you must check CROWNWeb to ensure the form is finalized by the Network. When the form is submitted the Network reviews and determines if the form is rejected or finalized. Facilities are expected to assist the Network with finalizing the form. The form must be finalized for the CMS-2744 process to be completed. Check the status of the form and email for information from the Network regarding the status of the form.