End-Stage Renal Disease Quality Reporting System (EQRS)

Dialysis Facility Editor Quick Start Guide

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Table of Contents

Introduction

This Quick Start Guide provides the information necessary for dialysis facilities, corporate entities, End-Stage Renal Disease (ESRD) Networks and the Centers for Medicare & Medicaid Services (CMS) to use the **Patient Registry** module in the ESRD Quality Reporting System (EQRS).

EQRS Overview

EQRS is a cloud-based data collection system that is mandated by CMS to enable dialysis facilities to meet Section 494.180(h) of the 2008 updated Conditions for Coverage for ESRD dialysis facilities. The updated Conditions call for the electronic submission of administrative and clinical data by all Medicare-certified dialysis facilities in the U.S. The system is designed to help the renal community receive more complete and accurate data about dialysis patients. The system is also used to collect clinical performance measures data from dialysis facilities.

EQRS is used by CMS and the renal community to:

- Monitor the status of transplant activities, dialysis activities, and Medicare utilization (inpatient stays and outpatient dialysis bills) of ESRD patients and their Medicare providers.
- Calculate Medicare ESRD coverage periods, dialysis coverage periods, clinical dialysis periods, and transplant periods for renal patients.
- Extract data for program analysis, policy development, and some epidemiological research.

- Serve as a repository of renal information for non-Medicare patients who reside in the United States and as one of the primary sources of data for the United States Renal Data System (USRDS).

The **Patient Registry** has several sections. This User Guide covers the Dashboard, Facilities, Patients, and Reports sections. It provides information on how to access each section, enter required information, and download information (if applicable). Information presented in this Guide is subject to change.

Log in to EQRS

1. Open your Chrome web browser and go to https://eqrs.cms.gov/.
2. Click **Sign In**. The EQRS Log In screen displays.
3. Enter your EQRS username and password.
4. Click the **Agree to our Terms & Conditions** checkbox and click **Sign In**. A two-factor authentication screen displays.
5. Click **Send code** or make the appropriate selections to receive a one-time security code.
6. Enter the security code and click **Verify**.

Dashboard

View Status of Forms, Accretions, Screenings, and System Discharges

1. Click **Dashboard**.
2. In the Facility Dashboard Overview section, a list of Upcoming Reminders is displayed.
3. The left-hand side of the screen displays several different topics including Forms CMS-2728 and CMS-2746, Accretions, Systems Discharges, Form CMS-2744 Status, Clinical Data, Patient Screenings and Dialysis Facility Transplant Waitlist. These sections provide information on missing data and contain hyperlinks to view patient records and to complete/submit needed data.

View and Download Dialysis Facility Transplant Waitlist Report

1. Click **Dashboard**.
2. Click on **Dialysis Facility Transplant Waitlist**.
3. Click on **Download CSV**.
4. The file will appear in the Chrome browser.
5. Click on the small arrow.
6. The report will be downloaded and opened in Microsoft Excel.

Facilities

Search Facilities

1. Click **Facilities**.
2. Click **Search Facilities**. The Search Facilities screen displays.
3. Enter your search criteria and then click on the desired facility's details. The Facility Summary screen displays.

Edit Facility Default Preferences

1. Click **Facilities**.
2. Click **Search Facilities**. The Search Facilities screen displays.
3. Enter your search criteria and then click on the desired facility's details. The Facility Summary screen displays.
4. Click the **Default Preferences** link in the Actions section. The View Default Preferences screen displays.
5. Make desired changes.
6. Click **Submit**. The View Default Preferences screen displays the message **"**Facility default preferences submitted successfully."

Edit Facility Information

1. Click **Facilities**.
2. Click **Search Facilities**. The Search Facilities screen displays.
3. Enter your search criteria and then click on the desired facility's details. The Facility Summary screen displays.
4. Click **View to edit** next to the desired section(s) or click on each section's title to the left of the screen.
5. Click **Edit**, make the desired changes, and click **Update**. The screen refreshes and displays a message indicating that the information was updated successfully.

Add Facility Contacts

1. Click **Facilities**.
2. Click **Search Facilities.**
3. Enter your facility search criteria.
4. Click on your facility name when it appears. The Facility Summary page displays.
5. Scroll to the Contact Information section and click **View to Edit**.

6. Next to Facility Contacts, click **Edit**.
7. Click the drop-down in the **Positions** field and click the box next to all the positions that apply.
8. Enter the required information for the Facility Contact.
9. Click **Update**. The screen displays the message "Facility contacts updated successfully."

Form CMS-2744

Add, Generate and Save Form CMS-2744

1. Click **Facilities**.
2. Click **Form 2744**.
3. Select the **Survey Year** (previous calendar year) and **Survey Status** (Missing) and click **Search**.
4. Click **Add** in the Actions section.
5. Click the **Generate** button.
6. Review pre-populated data and enter information in the Treatment and Staffing section.
7. If you have comments or remarks, enter these in the **Comments** box.
8. Click **Save**.

Edit an existing Form CMS-2744

1. Click **Facilities**.
2. Click **Form 2744**.
3. Select the **Survey Year** and **Survey Status** (Existing) and click **Search**.
4. Click **View** under the Actions column.
5. Click **Edit**.
6. Click **Generate**.
    a. The pre-populated fields will automatically update.
    b. Make updates in the Treatment and Staffing sections (if needed).
7. Click **Save**.

Run and download Form CMS-2744 Reports

1. Click **Facilities**.
2. Click **Form 2744**.
3. Select the **Survey Year** and **Survey Status** and click **Search**.

4. Click **View** in the Actions section.
5. Click **Edit**.
6. Select the desired report.
7. The report will appear in the top corner of the internet browser.
8. Click on the small arrow.
9. The report will be downloaded and will open in Microsoft Excel.

Submit a Form CMS-2744

1. Click **Facilities**.
2. Click **Form 2744**.
3. Select the **Survey Year** and **Survey Status** and click **Search**.
4. Click **View** in the Actions section.
5. Click **Submit for Review**.
6. Click **Yes** when asked, **"**Are you sure you want to submit form for review?".

Medical Personnel

Add Medical Personnel

1. Click **Facilities**.
2. Click **Medical Personnel**. The Medical Personnel screen displays.
3. Click **Add Medical Personnel** in the upper right-hand corner of the screen.
4. If available, enter the Physician's National Provider Identifier (NPI) in the Practitioner NPI field or click **Find provider on NPPES NPI Registry** to look up the NPI and enter it once obtained.
5. Verify the practitioner's name.
6. Click **Add Personnel**.
7. The Medical Personnel screen will now display the new practitioner.

Inactivate Medical Personnel

1. Click **Facilities**.
2. Click **Medical Personnel**. The Medical Personnel screen displays.
3. In the **Personnel** box, scroll to the correct physician or type the physician's last name.
4. In the Status column click the **Green Check Mark** next to the word "Active."

5. A message will appear stating that the “Physician was Inactivated Successfully.” The green check mark will turn gray and the word “Inactive” will appear next to the physician’s name in the Status column.

Attestation

In-Center Hemodialysis CAHPS (ICH CAHPS)

1. Click **Facilities**.
2. Click **Attestation**.
3. Click **In-Center Hemodialysis CAHPS (ICH CAHPS)**.
4. If your facility treated fewer than 30 eligible patients during the eligibility period, check the box indicating ineligibility (treating fewer than 30 patients for the measurement period).
5. Enter the First and Last Name of the person completing attestation.
6. Click **Submit**.

Patients

Search Patients

View Patient Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.

NOTE: A patient will not be shown under the search results if the patient has never been admitted to your facility.

Edit Patient Information

NOTE: Only patients admitted to your dialysis facility can be edited.

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.

4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Edit**. The Edit Patient screen displays.
6. Make the desired changes and click **Submit**. The View Patient Demographics screen displays the message "Successfully edited patient."

View Patient Admit/Discharge Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Admissions**. The View Patient Admissions screen displays.
6. Click the **Admit Date**. The screen refreshes and displays the View Admission Information section.

Edit Patient Admit/Discharge Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Admissions**. The View Patient Admissions screen displays.
6. Click the **Admit Date**. The screen refreshes and displays the View Admission Information section.
7. Click **Edit**. The screen refreshes and provides the ability to edit the admission and discharge information in the Edit Admission Information section.
8. Make the desired changes. Click **Submit**. The View Patient Admissions screen displays the message **"**Admission record updated successful."

Discharge a Patient

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria. Click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.

4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Admissions**. The View Patient Admissions screen displays.
6. Click the **Admit Date**. The screen refreshes and displays the View Admission Information section.
7. Click **Edit**. The screen refreshes and provides the ability to edit the admission and discharge information in the Edit Admission Information section.
8. Enter the **Discharge Date**, select the **Discharge Reason**. Click **Submit**. The View Patient Admissions screen displays the **Discharge Date** and **Discharge Reason** and the message “Admission record updated successful.”

NOTE: The **Transfer Discharge Subcategory** field is required if “Transfer” is selected as the **Discharge Reason.**

Form CMS-2728

Add an Initial Form CMS-2728

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2728**. The Manage Form CMS-2728 screen displays.
6. Click **Add Initial 2728** in the Eligible 2728 Forms section. The Add an ESRD Medical Evidence (2728) screen displays.
7. Enter the required information in Sections A and B. (Section C is for transplant facilities, and Section D is for all ESRD self-dialysis training patients.) Select the **GFR Calculation Method** in Section F, then click **Save**. The message “Successfully saved Form 2728” displays.
8. Click **Print**. The report viewer displays the Form CMS-2728 in a PDF format.
9. Click the **Printer icon**; enter any print parameters and click **OK**.
10. Obtain the required signatures from the attending physician and patient on the printed Form CMS-2728.
11. Log back in to EQRS to complete the Form CMS-2728; repeat Steps 1-5.
12. Click the **Initial Dialysis+** in the Existing 2728 Forms column. The View ESRD Medical Evidence (2728) – Saved screen displays.
13. Click **Edit**; the Edit an ESRD Medical Evidence (2728) – Saved screen displays.

14. In Sections E and F, enter the dates the attending physician and patient signed the form, and click **Submit**.
15. The View ESRD Medical Evidence (2728) – Submitted screen displays with the message "Successfully submitted Form 2728."
16. Mail the original, signed Form CMS-2728 to the local Social Security Administration office.
17. Keep a copy of the original, signed Form CMS- 2728 with the patient's records.

Add a Re-entitlement Form CMS-2728

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria. Click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2728**. The Manage Form 2728 screen displays.
6. Click the **Add Re-entitlement 2728** button in the Eligible 2728 Forms section. The Add an ESRD Medical Evidence (2728) screen displays.
7. Enter all available information and click **Save**. The message "Successfully saved Form 2728" displays.
8. Click **Print**. EQRS displays the CMS-2728 Form in a PDF format.
9. Click the **Printer icon**; enter any print parameters and click **OK**.
10. Obtain the required signatures from the attending physician and patient on the printed CMS-2728 Form.
11. Log back in to EQRS to complete the CMS-2728 Form; repeat Steps 1-5.
12. Click the **Re-entitlement Dialysis After Transplant Failed+** link in the Existing 2728 Forms column. The View ESRD Medical Evidence (2728) – Saved screen displays.
13. Click **Edit**; the Edit an ESRD Medical Evidence (2728) – Saved screen displays.
14. In Sections E and F, enter the dates the attending physician and patient signed the form, and click **Submit**.
15. The View ESRD Medical Evidence (2728) – Submitted screen displays with the message "Successfully submitted Form 2728."

Add a Supplemental Form CMS-2728

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.

3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2728**. The Manage Form 2728 screen displays.
6. Click the **Add Supplemental 2728** button in the Eligible 2728 Forms section. The Add an ESRD Medical Evidence (Supplemental – 2728) screen displays.
7. Enter all available information and click **Save**. The message **"**Successfully saved Form 2728**"** displays.
8. Click **Print**. EQRS displays the Form CMS-2728 in a PDF format.
9. Click the **Printer icon**; enter any print parameters and click **OK**.
10. Obtain the required signatures from the attending physician and patient on the printed Form CMS-2728.
11. Log back into EQRS to complete the Form CMS-2728; repeat Steps 1-6.
12. Click the **Supplemental Training+** link in the Existing 2728 Forms column. The View ESRD Medical Evidence (2728) – Saved screen displays.
13. Click **Edit**; the Edit an ESRD Medical Evidence (Supplemental 2728) – Saved screen displays.
14. In Section E and Section F, enter the dates the attending physician and patient signed the form, and click **Submit**.
15. The View ESRD Medical Evidence (2728) – Submitted screen displays with the message "Successfully submitted Form 2728."

View a Saved/Submitted Form CMS-2728

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2728**. The Manage Form 2728 displays.
6. Under Existing 2728 Forms, select desired hyperlinked form.

Edit a Saved Form CMS-2728

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.

3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2728**. The Manage Form 2728 screen displays.
6. Click **Initial Dialysis+** in the Existing 2728 Forms column. The View ESRD Medical Evidence (2728) – Saved screen displays.
7. Click **Edit**. Edit an ESRD Medical Evidence (2728) – Saved screen displays.
8. Make any changes or additions to the data and click **Save** or **Submit**. The View ESRD Medical Evidence (2728) – Saved (or Submitted) screen displays with the message "Successfully saved (or submitted) Form 2728."

Print a Form CMS-2728

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2728**. The Manage Form 2728 screen displays.
6. Click **Initial Dialysis+** link in the Existing 2728 Forms column. The View ESRD Medical Evidence (2728) – Saved screen displays.
7. Click **Edit**. Edit an ESRD Medical Evidence (2728) – Saved screen displays.
8. Click **Print**. Form CMS-2728 displays in a PDF format.
9. Click the **Printer icon**; enter any print parameters and click **OK**.

Form CMS-2746

Add a Form CMS-2746

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Edit**. The Edit Patient screen displays.

6. Scroll down to the Medical Information section. Enter the **Effective Date** (must be on or prior to Death Date)**, Death Date** and **Death Code**; then click **Submit**. The View Patient Demographics screen displays with the message "Successfully edited patient."
7. Click **Form 2746**. The Add a Death Notice (2746) screen displays with information pre-populated from the current patient record.
8. Enter all required information on the screen and click either **Save** or **Submit**. The View a Death Notice (2746) – Saved (or Submitted) screen displays with the message "Successfully saved (or submitted) Form 2746."
9. To print the Form CMS-2746, click **Print**. Form CMS-2746 displays in a PDF format.
10. Click the **printer icon**; enter any print parameters and click **OK**.

View a Saved/Submitted Form CMS-2746

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2746**. The View a Death Notice (2746) screen displays.

Edit a Saved Form CMS-2746

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Form 2746**. The View a Death Notice (2746) – Saved screen displays.
6. Click **Edit**. The Edit a Death Notice (2746) – Saved screen displays.
7. Apply the desired changes; click **Save** or **Submit**. The View a Death Notice (2746) – Saved (or Submitted) screen displays with the message "Successfully saved (or submitted) Form 2746."

Edit a Submitted Form CMS-2728 or CMS-2746

1. Review the CMS guidelines for requesting changes to a submitted form: https://mycrownweb.org/2024/09/25/form-mod-process-update/.
2. Contact your local ESRD Network https://esrdnetworks.org/membership/esrd-networks-contact-information/.

View Patient Treatment Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Treatments**. The View Patient Treatments screen displays.
6. Click the **Admit Date**. The screen refreshes and displays the Treatment Start Date in the Treatment Summary section.
7. Click the **Treatment Start Date**. The screen refreshes and displays the treatment details in the View Treatment Information section.

Add Patient Treatment Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Treatments**. The View Patient Treatments screen displays.
6. Click the **Admit Date**. The screen refreshes and displays the **Treatment Start Date** in the Treatment Summary section.
7. Click **New Treatment**. The Add Treatment Information screen displays.
8. Enter data in the required fields for the patient’s new treatment information; then click **Submit**.
9. The View Treatment Information screen displays the new treatment record.

Edit Patient Treatment Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Treatments**. The View Patient Treatments screen displays.

6. Click the **Admit Date**. The screen refreshes and displays the **Treatment Start Date** in the Treatment Summary section.
7. Click the **Treatment Start Date**. The screen refreshes and displays the treatment details in the View Treatment Information section.
8. Click **Edit**. The screen refreshes to enable fields in the Edit Treatment Information section.
9. Make the desired changes and click **Submit**. The View Patient Treatments screen displays the message "Treatment record update successful."

Add Vaccination Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Vaccinations**. The Patient Vaccination Data screen displays.
6. Click the **Add Vaccination Data** button(s) in the Vaccinations Summary section. The Add Vaccination Data screen displays.
7. Enter all available information and click **Add Vaccination Data**. The message "Vaccination data successfully added" displays at the bottom of the screen.

Add Peritonitis Infection Information

1. Click **Patients**.
2. Click **Search Patients**. The Search Patients screen displays.
3. Enter your search criteria, and then click **Submit**. The Search Patient Results screen displays a list of patients matching your search criteria.
4. Click the **EQRS Patient ID** for the desired patient. The View Patient Demographics screen displays.
5. Click **Infections**. The Patient Infections Events Data screen displays.
6. Click the **Add Infection Data** button in Infections Summary section.
7. Select the facility patient was admitted to when infection occurred.
8. Click **Create New Infections Event**. The Add Infections Data screen displays.
9. Enter all available information and click **Save & Exit** or **Submit Infection Data**. The message "Infection updated successfully" is displayed at the bottom of the Patient Infections Events Data screen.

Admit a Patient

Admit a New ESRD Patient

NOTE: A New ESRD Patient is one who has never been on dialysis or received a transplant.

1. Click **Patients**.
2. Click **Admit a Patient**. The Admit Patient screen displays.
3. Enter the patient's information and select New ESRD Patient in the **Admit Reason** field. Click **Next**. The screen refreshes and displays the following sections:
    a. Ethnicity, race, tribe, and origin
    b. Contact Information
    c. Miscellaneous Information
    d. Medical Information
    e. Admission Information
    f. Dialysis Treatment Information
4. NOTE: Add any information that will be required for the Forms CMS-2728, CMS-2746, or CMS-2744.
5. Enter all available data and click **Submit**. The message "Patient admission was successful" displays.

Admit a Transfer (Existing) Patient

NOTE: An Existing patient is one that already exists in EQRS (previously admitted to a dialysis unit or having received a transplant).

1. Click **Patients**.
2. Click **Admit a Patient**. The Admit Patient screen displays.
3. Enter the patient's information.
4. In the **Admit Reason** field, select **Transfer In**. Click **Next**.

Near Match – In Scope Patient or Out of Scope Patient

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

5. Contact your ESRD Network for further assistance.

Exact Match – In Scope or Out of Scope Patient

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

5. Click **Accept**. The Admit Patient screen displays the message "Patient match found. New admission record will be created for this patient."
6. Review the auto-populated information, enter the required information, and click **Submit**. The message "Patient admission was successful" displays.

Manage Clinical

Add Clinical Information

1. Click **Patients.**
2. Click **Manage Clinical**. The Manage Patient Clinical Values screen displays.
3. Select the **Collection Type** from the drop-down list. The screen refreshes.
4. Select the **Clinical Month** from the drop-down list. The screen refreshes.
5. (Optional) To refine your search even more, in the **Last Name Group** field, select from the drop-down list the patients with last names that begin with those letters.
6. In the **Patient Clinical Status** field, select from the drop-down list whether to display patients **With Submitted Clinical Values**, **Without Clinical Values**, or **With Saved Clinical Values**. Leave blank to select all.
7. Click **Search Patients**. The Manage Patient Clinical Values screen refreshes displaying a list of patients in the **Select Patient** field who meet the search criteria.
8. Select the desired patient from the **Select Patient** field drop-down list. The screen refreshes, displaying details for the selected patient.

   NOTE: If no clinical information has been entered, the following message displays "No clinical data for selected facility, patient, and clinical month."
9. (Optional) Enter a **Common Lab Test Date**.
10. Enter the clinical data for the patient under each category or select the appropriate N/A checkbox.

    NOTE: Two "N/A" check box options are available:

    - No Clinical Data Available for All Collection Types
        - The facility did not treat the patient AT ALL during a reporting month and has no data to enter.
        - Please note that selecting this box could result in penalties under the ESRD Quality Incentive Program (QIP) due to missing data.
    - N/A
        - The facility treated the patient, but did not draw or collect a specific lab test.

11. Click **Save** if you still have not entered all the clinical data for this patient and need to return to complete data entry.
12. Click **Submit** if you have completed all lab data entry for this patient.
13. If no error messages display, your clinical data has been validated and submitted in EQRS.

Clinical Depression

Add Clinical Depression Screening

1. Click **Patients**.
2. Click **Clinical Depression**. The main Clinical Depression Screening and Follow-up Reporting screen displays.
3. Locate the desired patient and click the **Report** link. The Clinical Depression Screening and Follow-up options display.
4. Select the appropriate screening option, then click **Submit**. The Clinical Depression screen displays the message “Clinical depression assessment reported successfully.”
5. Once submitted, the system will display the Clinical Depression Screen and Follow-Up Reporting screen. The Screening status column will update to a status of “Submitted.”

Social Drivers of Health (SDOH) Patient Screening

Enter SDOH Screening Data

1. Click **Patients**.
2. Click **Social Drivers of Health (SDOH) Patient Screening**. The Social Drivers of Health (SDOH) Patient Screening page displays.
3. Under Choose an assessment period, select the **Assessment Period** for which you would like to report, view, or edit SDOH screenings.
4. Select **Not Submitted** in the **Screening Status** field.
5. For each patient, click **Enter Screening Data** under the Actions column. The screen for Social Drivers of Health (SDOH) Screening displays.
6. Select **Yes** or **No** for the question “Has this patient been screened for the SDOH factors or assessment period 01/01/20xx – 12/31/20xx?”
    a. If you select **Yes**, proceed to the next section, and enter whether the patient screened positive for each of the SDOH factors.
    b. If you select **No**, options for the reason the patient was not screened are displayed. Select the reason the patient was not screened.
7. Click **Submit Screening**.

View SDOH status

1. Click **Patients**.
2. Click **Social Drivers of Health (SDOH) Patient Screening**. The Social Drivers of Health (SDOH) Patient Screening page displays.
3. Under Choose an assessment period, select the **Assessment Period** for which you would like to report, view, or edit SDOH screenings.
4. Locate the desired patient in the **Patient** field. To view all patients, leave this field blank.
6. In the **Screening Status** field, select from the drop-down list whether to display patients with one of the following statuses: **All screening statuses** or **Submitted**.
7. In the Actions column, **View/Edit** will appear next to patients with submitted SDOH screening information. Click **View/Edit** to review and/or edit the information submitted for the patient.
8. Click **Submit Screening** if you edited the screening information, or **Close** if no edits were made.

NOTE: SDOH screening information can only be edited during open assessment periods.

Action List

Access an Accretion

1. Click **Patients**.
2. Click **Action List**. The Action List screen displays.
3. (Optional) Select an **Action Type** or **Action Status**, then click **Filter**.
4. Click **Accretion** in the Action Type column. The View Accretion screen displays.
5. Review the information on the screen.

Accept Accretion

6. After **Step 5**, add any optional comments in the Comment History section.
7. Click **Accept** in the Assign Action Status drop-down field.
8. Click **Submit**. The Admit Patient screen displays with the message “Accretion under investigation.”
9. Enter any missing information and select **New ESRD Patient** in the **Admit Reason** field. Click **Next**. The screen refreshes and displays the following sections:
    a. Ethnicity, race, tribe, and origin
    b. Contact Information
    c. Miscellaneous Information
    d. Medical Information

    e. Admission Information
    f. Dialysis Treatment Information
    g. NOTE: Add any information that will be required for the Forms CMS-2728, CMS-2746, or CMS-2744.

10. Enter all available data and click **Submit**. The message “Patient admission was successful” displays.

Investigate Accretion

When you need time to research an Accretion before selecting an Action:

6. After **Step 5**, click **Investigate** in the Assign Action Status drop-down field. The Action List screen refreshes with the message **“**Accretion under investigation.”
7. Research the Accretion to determine whether to **Accept** or **Escalate to Network**.
8. Return to the View Accretion screen to resolve the Accretion.

Escalate Accretion

If you cannot resolve the Accretion and need help from your ESRD Network:

6. After **Step 5**, add any optional comments in the Comment History section as to why you are escalating the Accretion.
7. Click **Escalate to Network** in the **Assign Action Status** drop-down field. The View Accretion screen displays with the message “Accretion escalated.”
8. The Accretion is removed from your Action List.

Reports

View and Run Reports

1. Click **Reports**, then select Reports.
2. Click **Patient Events Report**.
    a. Enter **Date Range Start** and **Date Range End** dates.
    b. Under Report Parameters section, click the box next to the parameter(s) you would like to include in the report.
    c. Select **Export As** (either CSV or Excel).
    d. Click **Generate Report**.
    e. Go to Step 4.
3. Click **Patient Roster Report**.
    a. Enter date.

b. Select **Sort Order**.

c. Select **Export As** (either CSV or Excel).

d. Click **Generate Report**.

e. Go to Step 4.

4. The My Reports screen will display.
5. The Report Status column will indicate either "Pending" or "Complete."
6. Once the status changes to "Complete," click the file in the Type/Size column.
7. The file will appear in the Chrome browser.
8. Click on the small arrow.
9. The report will be downloaded and opened in Microsoft Excel.

Reports Dashboard

View Reports Dashboards

1. Click **Reports**.
2. Click **Reports Dashboard**.
3. Select desired dashboard.
4. Use filter options to view data.
5. Hover the mouse over the top right corner of each data table.
6. Click the three vertical dots, Menu Options will appear. Click **Export to CSV** or **Export to Excel**.
7. The file will appear in the Chrome browser.
8. Click on the small arrow.
9. The report will be downloaded and opened in Microsoft Excel.

Care Compare

View or Download Dialysis Facility Care Compare Reports

1. Click **Reports**.
2. Click **Care Compare**.
3. Select either **Patient List** or **Preview Report**.
4. Each will provide an option to download available reports.

Support

ESRD Networks

- **Identify your ESRD Network by using the list in this link.**
  - https://esrdncc.org/ESRDNetworkDirectory
- **Reasons to contact your ESRD Network**
  - Editing submitted Forms CMS-2728 and CMS-2746.
  - Questions about admission and discharge reasons.
  - Issues admitting a patient.
  - Updating a failed transplant patient’s status to Non-functioning.
  - Updating patient information page after a patient has been discharged.
  - Two records exist for the same patient and the records need to be merged.

QualityNet Help Desk

- **Email**
  - qnetsupport-esrd@cms.hhs.gov
- **Online Ticket submission**
  - https://cmsqualitysupport.servicenowservices.com/ccsq_support_central
- **Phone**
  - 1-(866)-288-8912
- **Reasons to contact the QualityNet Help Desk**
  - HARP Account Management
  - Quality Incentive Program (QIP) questions
  - Receiving errors in EQRS
  - Trouble logging in to EQRS
  - Two records exist for the same patient and the records need to be merged.