

# **EQRS**

### **Running Reports in EQRS**

Tricia Phulchand, BSN, RN Regional Data Manager



### Reports in EQRS





# Running a Patient Roster Report

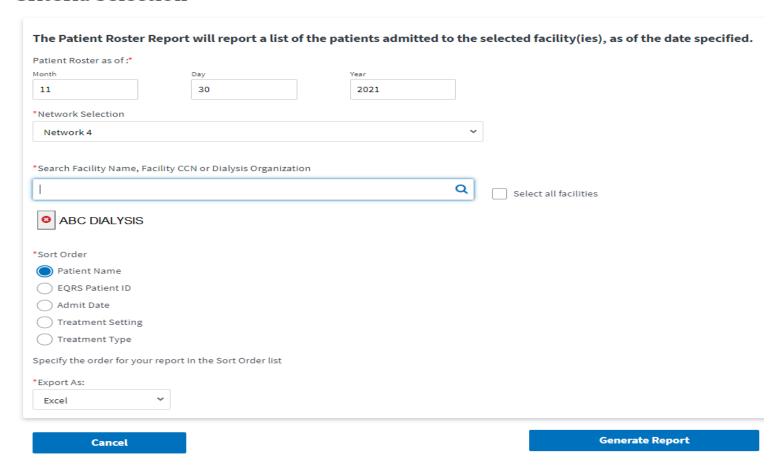
#### Please click on the **Patient Roster Report**

- Begin to fill in the criteria selection
- Fill in Patient Roster as of the end of the previous month
- Next under Network Selection, click Network 4
- Under Search Facility Name, Facility CCN or Dialysis Organization begin typing your CCN or facility name, when you see your facility below that box, click on it
- Under Sort Order: select Patient Name
- Export As: Excel
- Click Generate Report (Please note the page may just refresh and it looks as if nothing was done)
- Click on My Reports on the left hand side of the screen and if it went through you will see that the report is pending
- Wait a minute of two and then click on My Reports again and see if the report is listed as Completed
- Once completed, you should be able to click on the report to download it



# Patient Roster Report

#### **Patient Roster Report**





# My Reports

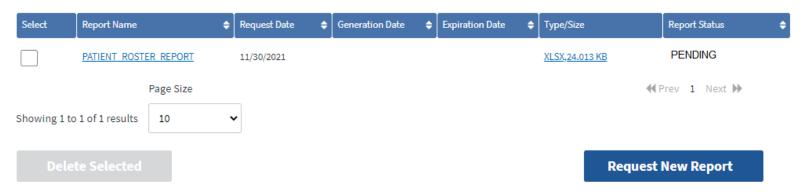
### My Reports

Reports

My Reports

Below is a list of queued reports available for download in the type/size column. Please select a report to download. Please click on the Update Results button to refresh the table results.

**Update Results** 





### What do I do next?

- Once your report is complete, click on the Excel file to download it.
- Once it is downloaded click to save the file and name it whatever file name you prefer.
- This file is already in Alphabetical order by the patients' last names.
- Hopefully you can compare this to a list from your EMR to confirm that this list is correct.



# Example of Patient Roster Report

NETWOR	RK 4													
<b>Patient</b>	Roster Rep	port As of: 1	1/30/2021											
Report Rur	Date: 11/30/	2021												
CCN	FACID	Facility Name	BSO	Facility NPI	EQRS ID	Last Name	First Name	Middle	DOB	Gender	Ethnicity	Race	MBI	Home Phone
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	4RUNNER	TOYOTA		01/01/1901	Male	Not Hispanic or Latino	Black or African American	1000	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	ADAMS	FESTER		01/01/1901	Male	Hispanic or Latino	White		555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	ADAMS	MORTICIA		01/01/1901	Female	Not Hispanic or Latino	Native Hawaiian or Other Pacific Islander	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	ADAMS	GRANDMA		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	ALFREDO	FETTUCINE		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	BANANA	CHIQUITA		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	BANNER	BRUCE		01/01/1901	Male	Not Hispan yt	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	BREAD	CHALLAH	M	01/01/1901	Famala	Nor unit latin	ack or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	BROWNIE	FUDGE		01/01/190	Femal	Mose Co O	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	BUBBA	HUBBA		01/01/1901	ale	Ni Amt or Latino	White	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	CABBAGE	CORNED BEEF	0	01/01/1901		Not Hispanic or Latino	White		555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	CAKE	RED VELVET	11	01/0 1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	CHANEY	YON (	$\bigcup_{\lambda} \int_{\Gamma}$	01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	CHEESE			01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	21/1	LA ENANT		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	16891201	1234 (5510	DEBE	UTTLE		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	16 76141	34 8910	NUT	GLAZED		01/01/1901	Male	Not Hispanic or Latino	Black or African American		555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	168 441	45670010	DORITOS	COOLRANCH		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	16891 41	12345678910	DUCK	DAFFY		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	DUKE	80		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	DUKE	LUKE		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	DUMPLING	STEAMED		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	FEMALE	SINGLE		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	FISH	BLUE		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHIU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	FRIES	STEAK		01/01/1901	Male	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	FRUIT	KIWI		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	FUDD	ELMER		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555
100000	2100018611	ABC DIALYSIS	SESAME STREET	1689176141	12345678910	GOOD GUY	CHUCKIE		01/01/1901	Female	Not Hispanic or Latino	Black or African American	ABCDEFGHU1	555555555



### Running Events Report for Admissions

Please click on the **Patient Events Report** (you will be running this report twice, once for admissions and again for discharges)- [unless you are savvy with Excel, then you can combine the two options as I explain in later slides and manipulate to your heart's content]

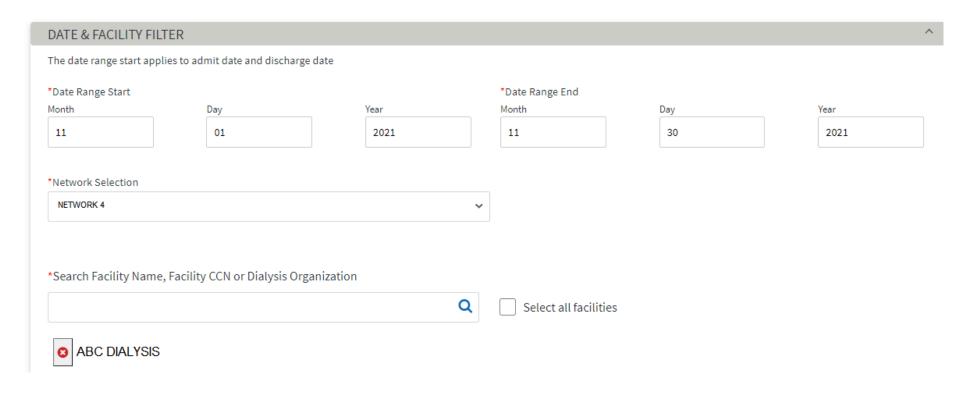
- Begin to fill in the criteria selection
- Your date range can be whatever you choose. You can start from January or you can run one for each month to capture your admissions and discharges for the previous month. When working on the annual CMS 2744 you should run a report for the entire year from January 1 to December 31 (01/01/202\_ 12/31/202\_)
- Next under Network Selection, click Network 4
- Under Search Facility Name, Facility CCN or Dialysis Organization begin typing your CCN or facility name, when you see your facility below that box, click on it
- Under Report Parameters: select every option under Admit Reasons but Dialysis in support of Transplant and Transplant
- Select to export to Excel
- Click Generate Report (Please note the page may just refresh and it looks as if nothing has happened)
- Click on My Reports on the left hand side of the screen and if it went through you will see that the report is pending
- Wait a minute or two and then click on My Reports again and see if the report is listed as Completed
- Once completed, you should be able to click on the report to download it



# Patient Events Report for Admissions

### **Patient Events Report**



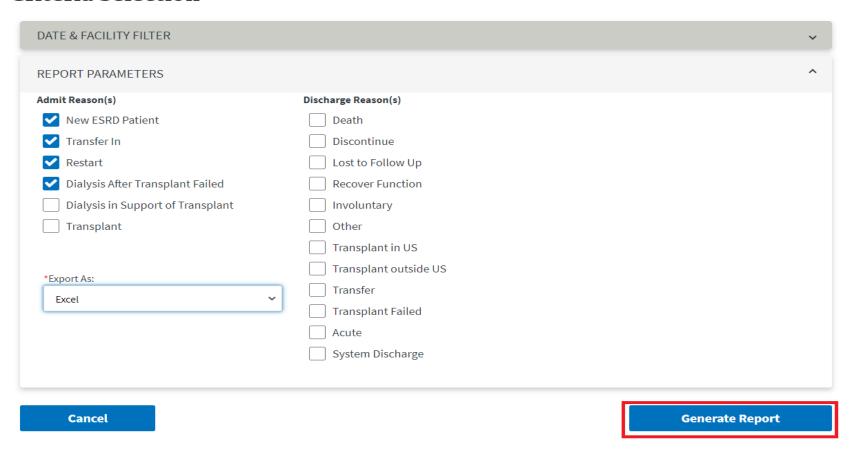




# Patient Events Report for Admissions

#### **Patient Events Report**

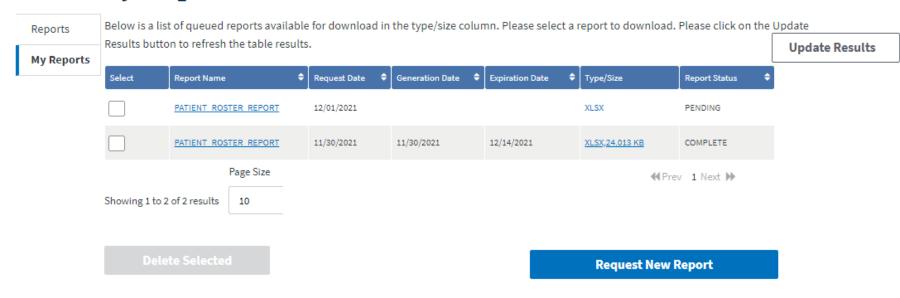






# My Reports

#### My Reports





### What do I do next?

- Once your report is complete, click on the Excel file to download it.
- Once it is downloaded you may see the following appear at the top of the screen. You must click Enable Editing before proceeding...



- Next save the file and name it whatever file name you prefer
- With the file open, you will need to delete the first three rows of information
- Next on the informational ribbon at the top of the screen, click on the data tab and then click the funnel-shaped icon marked filter



 This will allow you to filter your data by a row header (the first row that has titles such as "EQRS ID, Last Name, etc)



# Additional Steps...

- If you utilize an internal tracking sheet by month then you may want to filter by "Admit Date"
  - Find the column named, "Admit Date", click the small upside down triangle on the right of that box and select Sort Oldest to Newest. This will put this column in date order.
  - Now you have a list of patients admitted in date order and know how each patient was admitted to your facility
- If you utilize an internal tracking sheet by admission type, then you may want to filter by "Admit Reason"
  - Find the column named, "Admit Reason" click the small upside down triangle on the right of that box and select Sort A-Z. This will alphabetize the items in that column.
  - Now you have a list of patients by admission type and know how each patient was admitted to your facility.



# **Example of Patient Events Report**

Datiant I	Cuanta Day														
ratient i	Events Rep	ort													
As of 11	/01/2021-11	/30/2021													
									Facility						
			Middle						Phone					Discharge	
EQRS ID	Last Name	First Name	Initial	D08	Gender	MBI	Facility CCN	Facility DBA Name	Number	Admit Date	Admit Reason	Admit Treatment	Admit Setting	Date	Discharge Reaso
12345678910	ICE CREAM	SOFT SERVE		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	02/17/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	STRAWBERRIES	CHOCOLATE COVERED		01/01/1901	Female		312501	ABC DIALYSIS	9733991111	06/29/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	CHEESE	GRILLED		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	06/12/2020		Hemodialysis	Dialysis Facility/Center		
12345678910	POTATO CHIPS	LAYS		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	05/22/2020	No Pa Int Ou	Hemodialysis	Dialysis Facility/Center	07/17/2020	Death
12345678910	PATHFINDER	NISSAN	J	01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	10/202	ra en	Hemodialysis	Dialysis Facility/Center	09/02/2020	Transfer
2345678910	FRUIT	KIWI		01/01/1901	Female		312501	ABC DIALYSIS	9733003111	05 /202	estan	Hemodialysis	Dialysis Facility/Center	11/13/2020	Transfer
2345678910	NURSE	HEMODIALYSIS		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	97	03/2 2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
2345678910	PLANTAIN	YELLOW		01/01/1901	Male		31250	AP YS	33	04/29/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	SANTA FE	HYUNDAI		01/01/1901	Female	0,	nen	(DIA) IS	9733991111	07/28/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center	10/27/2020	Transfer
12345678910	LOMEIN	CHICKEN		01/01/1901		AL PG	31 11	ABOUNLYSIS	9733991111	03/24/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	LASAGNA	MEAT		01/01/15			312	ABC DIALYSIS	9733991111	11/11/2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
12345678910	T000	SWEENEY		01/190	en e	APCD JUI	312501	ABC DIALYSIS	9733991111	10/20/2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
12345678910	PLUTO	MR		0 1/1901			312501	ABC DIALYSIS	9733991111	11/18/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	STEAK	MEDIUM		01 1901	Female		312501	ABC DIALYSIS	9733991111	09/15/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center	09/26/2020	Transfer
12345678910	VOORHEES	JASON	J	01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	06/17/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
2345678910	LIGHTYEAR	BUZZ		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	09/01/2020	Transfer In	Hemodialysis	Dialysis Facility/Center	12/01/2020	Transfer
12345678910	VOLT	CHEVY		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	07/24/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	FEMALE	SINGLE		01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	10/30/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	TREE	PALM		01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	04/21/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	HOUSE	MAXWELL		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	04/22/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	POTATO HEAD	MR		01/01/1901	Female		312501	ABC DIALYSIS	9733991111	06/26/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	FRIES	STEAK		01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	02/06/2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
12345678910	CHANEY	LON		01/01/1901	Male		312501	ABC DIALYSIS	9733991111	11/03/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	SENTRA	NISSAN		01/01/1901	Male	ABCDEFGHU1	312501	ABC DIALYSIS	9733991111	08/18/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		



### Running Events Report for Discharges

#### Please click on the Patient Events Report

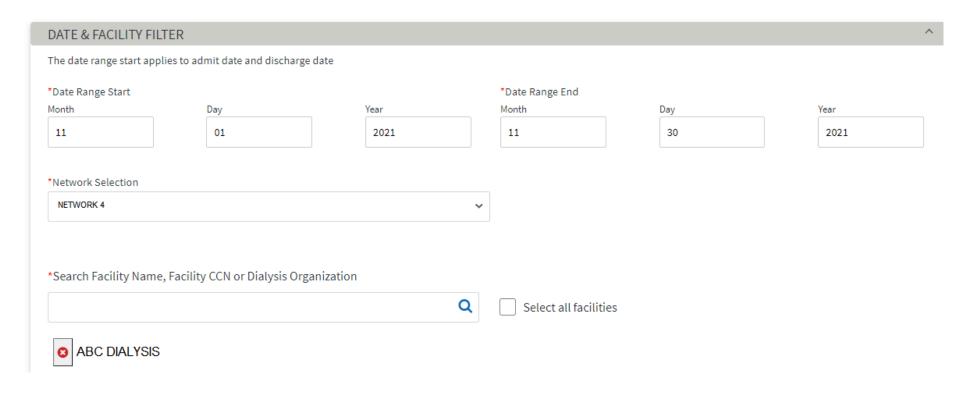
- Begin to fill in the criteria selection
- Your date range can be whatever you choose. You can start from January or you can run one for each month to capture your admissions and discharges for the previous month. When working on the annual CMS 2744 you should run a report for the entire year from January 1 to December 31 (01/01/202\_ -12/31/202\_)
- Next under Network Selection, click Network 4
- Under Search Facility Name, Facility CCN or Dialysis Organization begin typing your CCN or facility name, when you see your facility below that box, click on it
- Under Report Parameters: select every option under Discharge Reason (s) but Transplant
   Failed and Acute
- Select to export to Excel
- Click Generate Report (Please note the page may just refresh and it looks as if nothing was done)
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# Patient Events Report for Discharges

### **Patient Events Report**



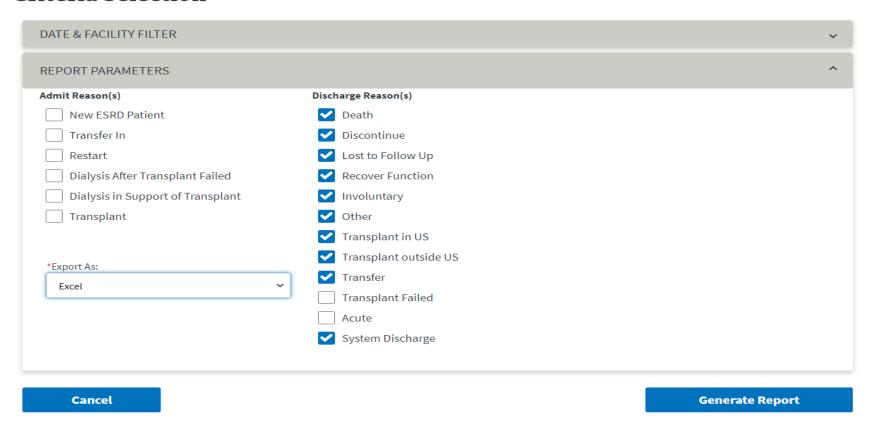




# Patient Events Report for Discharges

#### **Patient Events Report**







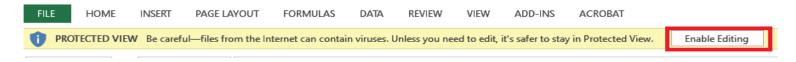
# My Reports





### What do I do next?

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 This will allow you to filter your data by a row header (the first row that has titles such as "EQRS ID, Last Name, etc)



# Additional Steps...

- If you utilize an internal tracking sheet by month then you may want to filter by "Discharge Date"
  - Find the column named, "Discharge Date", click the small upside down triangle on the right of that box and select Sort Oldest to Newest. This will put this column in date order.
  - Now you have a list of patients in date order and know how each patient was discharge from your facility.
- If you utilize an internal tracking sheet by admission type, then you may want to filter by "Discharge Reason"
  - Find the column named, "Discharge Reason" click the small upside down triangle on the right of that box and select Sort A-Z. This will alphabetize the items in that column.
  - Now you have a list of patients by discharge reason and know how each patient was discharge from your facility.



# **Example of Patient Events Report**

NETWORK	<b>4</b>														
Patient	Events Rep	oort													
As of 11	/01/2021-11	/30/2021													
EQRS ID	Last Name	First Name	Middle Initial	DOB	Gender	MBI	Facility CCN	Facility DBA Name	Facility Phone Number	Admit Date	Admit Reason	Admit Treatment	Admit Setting	Discharge Date	Discharge Reaso
12345678910	ICE CREAM	SOFT SERVE		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	02/17/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	STRAWBERRIES	CHOCOLATE COVERED		01/01/1901	Female		312501	ABC DIALYSIS	9733991111	06/29/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	CHEESE	GRILLED		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	06/12/2020	New ESRD Patient		Dialysis Facility/Center		
12345678910	POTATO CHIPS	LAYS		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	05/27/2020	New ESRD Patient	Homodialysis	Dialysis Facility/Center	07/17/2020	Death
12345678910	PATHFINDER	NISSAN	J	01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	08/10/2020	Transfer In		Dialysis Facility/Center	09/02/2020	Transfer
12345678910	FRUIT	KIWI		01/01/1901	Female		312501	ABC DIALYSIS	9733991111	05/08/2020	الم	alysis	Dialysis Facility/Center	11/13/2020	Transfer
12345678910	NURSE	HEMODIALYSIS		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	03/25/2020	nsfer	Hemodialysis	Dialysis Facility/Center		
12345678910	PLANTAIN	YELLOW		01/01/1901	Male		312501	ABC DIALYSIS	9733991111	2020	N ESBP utient	Hemodialysis	Dialysis Facility/Center		
12345678910	SANTA FE	HYUNDAI		01/01/1901	Female		312501	ABC DIALYSIS	97321911		New coRD Patient	Hemodialysis	Dialysis Facility/Center	10/27/2020	Transfer
12345678910	LOMEIN	CHICKEN		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC LOLYSIS	33 (11)	03 2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	LASAGNA	MEAT		01/01/1901	Male		31250	DU 515	3992221	11/11/2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
12345678910	TODD	SWEENEY		01/01/1901	Female	ABCDEFGHIJ1		A DIAL S	9733991111	10/20/2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
12345678910	PLUTO	MR		01/01/1901	Forme	20	3) 01	ABLUIALYSIS	9733991111	11/18/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	STEAK	MEDIUM		01/01/1901	male	$\cup$		ABC DIALYSIS	9733991111	09/15/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center	09/26/2020	Transfer
12345678910	VOORHEES	JASON	J	01/01/1901	F VIe	AB FGHIJ1		ABC DIALYSIS	9733991111	06/17/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	LIGHTYEAR	BUZZ		01/01/1901	Ma	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	09/01/2020	Transfer In	Hemodialysis	Dialysis Facility/Center	12/01/2020	Transfer
12345678910	VOLT	CHEVY		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	07/24/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	FEMALE	SINGLE		01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	10/30/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	TREE	PALM		01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	04/21/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	HOUSE	MAXWELL		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	04/22/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	POTATO HEAD	MR		01/01/1901	Female		312501	ABC DIALYSIS	9733991111	06/26/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	FRIES	STEAK		01/01/1901	Female	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	02/06/2020	Transfer In	Hemodialysis	Dialysis Facility/Center		
12345678910	CHANEY	LON		01/01/1901	Male		312501	ABC DIALYSIS	9733991111	11/03/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		
12345678910	SENTRA	NISSAN		01/01/1901	Male	ABCDEFGHIJ1	312501	ABC DIALYSIS	9733991111	08/18/2020	New ESRD Patient	Hemodialysis	Dialysis Facility/Center		



# Who do I call if I have a question?

### **QualityNet Help Desk**

Please contact the QualityNet Help Desk if your forms are not running at: 866-288-8912 (Monday - Friday 8am to 8pm EST) or via e-mail at <a href="mailto:qnetsupport-esrd@hcqis.org">qnetsupport-esrd@hcqis.org</a>.

### **Quality Insights Data Department**

If you have a question about your admissions or forms please contact:

QIRN 3 (NJ, PR, USVI): Tricia Phulchand 609-490-0310 x 2422

Cheryl Brown 609-490-0310 x 2420

QIRN 4 (PA, DE): Karen Hricak 610-265-2418 x 2810

QIRN 5 (MD, VA, WV, DC): Alison Crittenden 804-320-0004 x 2707

