

Adding, Editing, and Deleting Facility Personnel

Goal: Learn to add new personnel to a facility; learn to search, view, and edit facility personnel information; and delete or inactivate existing facility personnel from CROWNWeb.

Estimated Time: 25 to 35 minutes

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Course Goals

By completing this course, you will be able to:

- **Search** for a staff member associated with your facility.
- **Add** new personnel to your facility in CROWNWeb.
- **View** information about facility personnel already in CROWNWeb.
NOTE: *You can only see information for personnel in a facility that you have scope over.*
- **Edit** personnel information within CROWNWeb.
- **Delete** or **inactivate** existing facility personnel from CROWNWeb.

Before You Begin...

Before you can complete this procedure, the following conditions must be met:

- A **Network Facility Editor** may add, edit, or delete personnel for any facility in their Network.
- A **Facility Editor** may add, edit, or delete personnel for any facility to which they have been granted scope. **NOTE:** *Staff members who are associated with any patient treatment, CMS-2728, or CMS-2746 records may not be deleted.*
- A **Network user** may view information for all personnel in the United States.
- **Facility users** may view information only for users within their scope.

Let's get started!

Add New Facility Personnel

The following interactive tutorial will guide you through adding new facility personnel in CROWNWeb.

1. Click Personnel

From the *CROWNWeb Home Page*, click **Personnel**. The *Search for Personnel* screen displays.

2. Click Add Personnel

Click **Add New Personnel** in the sub-menu. The *Add New Personnel* screen displays.

3. Enter Employee Info

Enter information for the employee, then click **Submit**. The *Personnel Details* screen displays.

Make sure to select a **Job Description** such as *Nephrologist*, *Facility Medical Director*, or *Other Physician* in order to have that physician's name show in the pull-down menu when completing the CMS-2746 Form.

4. Personnel Submitted

A confirmation message "**Personnel Submitted**" displays on the *Personnel Details* screen, if the submission was successful.

Search, View, and Edit Facility Personnel in CROWNWeb

The following interactive tutorial will guide you through **searching, viewing, and editing facility personnel** in CROWNWeb.

Search and View Personnel

1. Click Personnel

From the CROWNWeb *Home Page* screen, click **Personnel**. The *Search Personnel* screen displays.

2. Enter Search Criteria

Enter your search criteria. Click the **Search** button at the bottom of the screen. The *Personnel Details* screen displays based on the search criteria entered.

3. Search Results Screen

Personnel who meet the search criteria entered, and who have been entered into CROWNWeb are listed on this screen.

4. No Records Match

If CROWNWeb does not find the staff member listed among the Personnel in the system, you will get the following message: **“Please correct the following: No records match search terms entered. Please revise your search criteria and consider using wildcards.”**

5. Click Personnel Name

Click on the link in the **Personnel Name** column for the staff member’s information you want to view. The *Personnel Details* screen displays. Scroll down to view all of the information.

6. Alternate Search Method

Within Facilities, after searching and selecting a specific facility, from the *Facility Details (Submitted)* screen click on **View Personnel** in the gray sub- menu. The *Personnel Search Results* screen displays with a list of personnel.

Search, View, and Edit Facility Personnel in CROWNWeb (cont.)

7. Click Employee Name

Click the employee name in the **Personnel Name** column. The *Personnel Details* screen displays all the details for the employee.

Edit Personnel Information

1. Click Edit Personnel

To edit personnel information, click **Edit Personnel** in the gray sub-menu. The *Edit Personnel* screen displays.

2. Working at More Than One Facility

If the staff member works at more than one facility, CROWNWeb displays a line for each facility.

3. Make Edits

Make edits as applicable; or click **Add Another Position** to add another job position to the employee.

4. Add Another Position

To add another job position to the employee:

- a) Enter the **Facility CCN** or **Facility NPI**, and click **Go**.
- b) Select the facility name from the **Facility DBA Name** drop-down menu.
- c) Select the **Job Description** from the pull-down menu.
- d) Scroll down and click **Submit**.

5. Personnel Edits submitted

The *Personnel Details* screen redisplay with the message **“Personnel Submitted.”**

Delete or Inactivate Personnel

The following interactive tutorial will guide you through deleting or inactivating existing facility personnel in CROWNWeb.

Delete Personnel

1. Click Personnel

From the CROWNWeb *Home Page*, click **Personnel**. The *Search for Personnel* screen displays.

2. Enter Search Criteria

Enter search criteria to find the desired person, then click **Search**. The *Personnel Search Results* screen displays a list of personnel matching your search criteria.

3. Click Personnel Name

Click the **Personnel Name** of the desired user. The *View Personnel Details* screen displays.

4. Click Edit Personnel

Click **Edit Personnel** in the gray sub-menu. The *Edit a Submitted Personnel* screen displays.

5. Click Delete

Scroll to the bottom of the screen and click **Delete**. A confirmation dialog box displays, asking you to confirm the deletion.

6. Confirm Delete

Click **Yes** to confirm the deletion. The *Search Personnel* screen redisplay.

7. Confirmation Message

The message "**Personnel successfully deleted**" displays, acknowledging the deletion of this individual from CROWNWeb.

Delete or Inactivate Personnel (continued)

Inactivate Personnel

1. Delete Error Message

If a staff member has ever been associated with a patient record, a CMS-2728, or CMS-2746, they *cannot* be deleted from CROWNWeb. When deleting this individual, an error message displays stating **“This person cannot be deleted if the person is associated with other records, such as Patient, Treatment, 2728, or 2746 records.”**

2. Click Inactive Record box

The staff member must be *Inactivated* instead of deleted. Click the **Inactive Record** checkbox.

3. Click Submit

Scroll down and click **Submit**. The *Personnel Details* screen redisplay.

4. Personnel Inactivated

The message **“Personnel Submitted”** displays. Note the **Inactive Record** checkbox is checked, but the field is not enabled (grayed out).

IMPORTANT!

Physicians should not be **Inactivated**; if they are associated with another facility, that will inactivate them from that facility also.

Instead, delete the physician's **Job Description** from his/her personnel record, and that will take him/her off of the facility's employee list.

Troubleshooting

Commonly experienced problems, recognized solutions, and other key information:

- **CROWNWeb Facility Editors** may only add personnel to facilities they have scope over. They cannot add personnel to other facilities.
- **Network Facility Editors** may view personnel in other Networks, but they may only add personnel to facilities in their own Network.
- You cannot delete personnel who are associated with patient treatment, CMS-2728 or CMS-2746 records.
- If you cannot see the **Personnel** link from the CROWNWeb *Home Page*, you may not have a role that permits you to view personnel information.
- If you can't find the person you are searching for, you may not have **scope** over the facility that that individual is associated with.
- Individual user **roles** and **scope** determine what a user can do and view in CROWNWeb.

Summary

To add new personnel to a facility:

1. From the *Home Page*, click **Personnel**.
2. Click **Add Personnel**.
3. Click **Add New**.
4. Enter or select their information, and then click **Submit**.
5. The *View Personnel Details* screen displays the message “**Personnel Submitted.**”

To search for facility personnel:

1. From the *Home Page*, click **Personnel**.
2. Enter search criteria and click **Search**.
3. The **Personnel Search Results** screen displays a list of personnel who meet the search criteria entered.

To edit personnel in CROWNWeb:

1. From the *Home Page*, click **Personnel**.
2. Enter search criteria and click **Search**.
3. Click the desired **Personnel Name**.
4. Scroll down the *Personnel Details* screen to view information.
5. If your user role allows you to make modifications, click **Edit Personnel**.
6. Make desired additions or changes.
7. Click **Submit**.

Summary (continued)

To delete or inactivate personnel from CROWNWeb:

1. From the *Home Page*, click **Personnel**.
2. Enter search criteria, and then click **Search**.
3. Click the **Personnel Name** for the desired staff member.
4. Click **Edit Personnel**.
5. Click **Delete**.
6. Click **Yes** to confirm delete.
7. If error message displays that the individual is associated with patient records and cannot be deleted, click the **Inactive Record** checkbox.
8. Click **Submit**.

Frequently Asked Questions

To view Frequently Asked Questions for this topic, click the following link:

[ACCESS FAQs](#)

Enter the words “**personnel,**” “**facility,**” or any other applicable keyword to view FAQ content for that topic.

Demonstration

The **Adding, Editing, and Deleting Facility Personnel** demonstration will allow you to watch how to add new personnel in CROWNWeb.

- Click the **View Demonstration** button below;
or
- Click the **Bypass Demonstration** button to skip the demonstration and advance to the **Adding, Editing, and Deleting Facility Personnel** Quiz.

View Demonstration

[Bypass Demonstration – To Quiz](#)

[Help on Pop-up Blocker](#)

Pop-up Blocker Instructions

To turn off pop-up blocker for your web browser when you get the “**Pop-up blocked.**” message...

Go to the top menu bar and select:

Tools > Pop-up Blocker > Always Allow Pop-ups from This Site...

[Return to Demonstration](#)

Quiz

The **Adding, Editing, and Deleting Facility Personnel** Quiz will test your knowledge on generating reports in the CROWNWeb system.

- Click the **Take Quiz** button below to take the **Adding, Editing, and Deleting Facility Personnel** Quiz;
- or
- Click the **Bypass Quiz** button to skip the quiz and advance to the end of the tutorial.

[Take Quiz](#)

[Bypass Quiz – End Tutorial](#)

[Help on Pop-up Blocker](#)

Adding, Editing, and Deleting Facility Personnel Quiz

1. You cannot delete facility personnel that are associated with: [Select all that apply]

- A. A patient who is a family member
- B. A CMS-2746
- C. Their spouse who also works for the facility
- D. A CMS-2728
- E. Treatment records

Answer: B. A CMS-2746, D. A CMS-2728, and E. Treatment Records

2. You are looking for a specific staff member, but cannot find them in CROWNWeb. What could be wrong?

- A. They work in another facility
- B. You don't have scope over that staff member's facility
- C. The staff member transferred out of state.

Answer: B. You don't have scope over that staff member's facility.

3. If you don't see the Personnel link on the CROWNWeb main menu, this means:

- A. You don't have a role that permits you to view personnel information
- B. You have navigated to the wrong page.
- C. There is no Personnel link on the Home Page.

Answer: A. You don't have a role that permits you to view personnel information.

[FINISH TUTORIAL](#)

Pop-up Blocker Instructions

To turn off pop-up blocker for your web browser when you get the “**Pop-up blocked.**” message...

Go to the top menu bar and select:

Tools > Pop-up Blocker > Always Allow Pop-ups from This Site...

[Return to Quiz](#)

For More Information

Quick Start Guides

The CROWNWeb Quick Start Guides provide short and simple instructions on tasks users can perform in CROWNWeb, including how to add, edit, and delete facility personnel.

Click the link below to access the CROWNWeb Quick Start Guides.

[**GO TO QUICK START GUIDES**](#)

Online Help

The CROWNWeb Online Help is a resource that contains instruction on all facets of the CROWNWeb system, including how to add, edit, and delete facility personnel.

Click the link below to access the CROWNWeb Online Help.

[**GO TO ONLINE HELP**](#)

Field-by-Field Descriptions

The CROWNWeb Field-by-Field Descriptions are an online resource that contains details on every field on screens in the CROWNWeb system.

Click the link below to access the Personnel Field-by-Field Descriptions.

[**GO TO FIELD DESCRIPTIONS**](#)

Thank you for taking this tutorial!

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