



How to balance CMS–2744 Annual Facility Survey in CROWNWeb?

If you are getting the following error – “The total number of patients (field 26) must equal the sum of the patients receiving care at the beginning of the survey period (field 03) plus the additions during the survey period (fields 04A through 07B) minus the losses during the survey period (fields 08A through 13B)” –it means that the survey is not balanced. Here are steps to resolve this error.

Run the report called ADDITIONS DURING SURVEY PERIOD REPORT

1. Highlight all columns and sort by patient admit date (column K). Then highlight rows before 2016 admit date. Sort these rows by patient name (column F). Then print the selected rows. Name this list as “Beginning patient population”.
2. Highlight rows with admit date in 2016. Sort these rows by patient name (column F). Print the selected rows. Name this list as “Additions in 2016”.

Run report called PATEINT RECEIVING CARE AT THE END OF THE SURVEY PERIOD REPORT

1. Highlight list and sort by patient name (column F). Then print the list. Name this list as “Ending patient population”.
2. Then compare patients on “Beginning patient population” and “Ending patient population”. Check off patients that are both lists.
3. Then compare patients on “Additions in 2016” and “Ending patient population”. Check off patients that are both lists (every patient should be checked off only once).
4. This should completely check off all the patients that are on the “Ending patient population” list. If any patient is left on the list, then go in to the patient record and check events as well as treatments.
5. Patients that aren’t checked off on “Beginning patient population” and “Additions in 2016” lists are verified for transfer in / out (column M & N). Check off patients for transfer in and transfer out. If the patient is not checked off on both lists, then go to their admission and discharge screen to make sure that the treatment date matches the admission date.