

HOME HEALTH OASIS SUBMISSION QUICK REFERENCE GUIDE

September 2022

Table of Contents

OASIS EXPORT CREATION.....	3
MARKING AN OASIS AS EXPORTED.....	3
OASIS CORRECTIONS – KEY FIELDS.....	4
OASIS CORRECTIONS – NON-KEY FIELDS.....	5
KEY VS. NON-KEY FIELDS.....	5
HELP CENTER.....	6

OASIS EXPORT CREATION

Create/OASIS Export

Once the OASIS documentation is complete and approved in the QA Center, go to OASIS Export. Within the OASIS Export screen, sort and filter by the below items:

- Branch - Filters by location or branch if the organization has more than one.
- Assessment Date Range - Defaults to the last 60 days from the current date. The date range may be changed. **NOTE:** Recommended updating to 30 days for PDGM.
- Payment Source - Defaults to Medicare (traditional fee-for-service). The payment source may be changed or updated to include additional sources.
- Check/Uncheck All - Allows the user to check or uncheck all OASIS currently filtered to allow for batch saving of documents.
- Export to Excel - This function allows the generated list to be exported to Excel.

NOTE: To ensure a comprehensive list of available OASIS is displayed, it is recommended that all Payment Sources are selected, and the date range is set from the beginning of the year to the current date.

1. Check the boxes of OASIS records to submit.
2. Select **Generate OASIS File**.
3. Generates a zipped XML file. Select **Save File**. Select **OK**.
4. Upload the file to [CMS](#) (QIES/QTSO).

MARKING AN OASIS AS EXPORTED

Once an OASIS is transmitted and received, the file should be marked as exported in the OASIS Export screen. **NOTE:** This step is critical to the organization's ability to bill.

1. Check the box of OASIS record.
2. Select **Mark Selected as Exported**. If the OASIS does not need to be exported, select **Mark Selected as Completed (Not Exported)**.
3. Go to *View/Exported OASIS* or *View/Not Exported OASIS* to view/edit.

For both exported and not exported OASIS, a grid will populate with the following search filters:

- Branch - Filters by location/branch if the organization has more than one.
- Status - Defaults to Active patients. The Status may be changed to view All or Discharged patients.
- Exported Date Range - Defaults to the previous 60 days from the current date. The date range may be changed. **NOTE:** Recommend updating to 30 days for PDGM.
- Export Status - Users can filter by individual status or all statuses.
- Export to Excel - This function allows the generated list to be exported to Excel.

An Export Status column appears on the Exported OASIS screen so users can update the status of each OASIS as responses are received. The statuses are:

- Exported - This status is automatically set for all historical OASIS items. (Users can update this to a more appropriate status as needed)
- Exported and Pending Response - This status is automatically set for all OASIS items that have been exported.
- Rejected - This status should be used when an OASIS has been rejected and requires additional action from the organization.
- Accepted - This status should be used when an OASIS has been accepted and no additional action is required.

While the Exported and Exported and Pending Response statuses are automatically set in the system, the Rejected and Accepted statuses must be manually set by the organization based on the response that is received from iQUIES. To update the status, the user must select the appropriate OASIS using the selection box to the left of the line item and select **Mark Selected as Rejected** or **Mark Selected as Accepted**.

OASIS CORRECTIONS – KEY FIELDS

View/Exported OASIS

1. Select **Edit**.
2. Change the Correction Number to 01.
3. Select **Edit**.
4. Select **Generate Cancel**.
5. Generates a zipped XML file. Select to **Save File**. Select **OK**.
6. Upload file to [CMS](#) (QIES/QTSO).

Once the cancellation has been accepted by the Centers for Medicare & Medicaid Services (CMS):

1. Select **Reopen**.
2. Select **Yes, Reopen**.
3. Go to *Patients/Patient Charts* find the patient/OASIS.
4. Select the OASIS to reopen.
5. Complete required updates to the OASIS.
6. Select **Save & Continue**.
7. The OASIS goes back to QA for approval.

NOTE: Only the assigned clinician will have the ability to make the update. Pending specific organization policy, select *Menu/Reassign* to update the user assigned to this task.

OASIS CORRECTIONS – NON-KEY FIELDS

If an error has been made in one or more Non-Key Fields, a cancellation file is **not** required. However, if the OASIS was accepted by CMS, the corrected file will need to be exported and resubmitted. To correct non-key fields, reopen the assessment from the Exported OASIS screen:

1. Select **Reopen**.
2. Enter the reason for reopening.
3. Select **Yes, Reopen**.

Go to *Patients/Patient Charts* to find the patient/OASIS.

1. Select the Task/OASIS to reopen.
2. Complete the required updates to the OASIS.
3. Select **Save & Continue**.
4. The OASIS goes back to QA for approval.

Return to the OASIS Export screen.

1. Select **Edit**.
2. Choose the correction number.
3. Select **Edit**.

KEY VS. NON-KEY FIELDS

Below are the key field descriptions. Non-key fields are all other fields comprising the OASIS data set.

KEY FIELDS	
Patient Identifiers:	
M0040_PAT_LNAME	Patient last name
M0040_PAT_FNAME	Patient first name
M0064_SSN	Patient social security number
M0066_PAT_BIRTH_DT	Patient date of birth
M0069_PAT_GENDER	Patient gender
HHA Identifiers:	
HHA_AGENCY_ID	Unique Agency ID code
Assessment Event Identifiers:	
M0100_ASSMT_REASON	Reason for completing assessment
M0090_INFO_COMPLETED_DT	Date assessment information completed (This is a key field only on recertification or follow-up assessments where RFA = 04 or 05)
M0030_START_CARE_DT	SOC date (This is a key field only on SOC assessments where RFA = 01)
M0032_ROC_DT	ROC date (This is a key field only on ROC assessments where RFA = 03)
M0906_DC_TRAN_DTH_DT	Discharge, transfer, death date (This is a key field only on transfer to inpatient facility assessments where RFA = 06 or 07, death at home assessments where RFA = 08 and discharge assessments where RFA = 09 or 10).

HELP CENTER

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or <https://www.axxess.com/help/>

