

# **HOME CARE OASIS SUBMISSION QUICK REFERENCE GUIDE**

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## **OASIS EXPORT CREATION**

*View/OASIS Management/OASIS Ready for Export*

Once OASIS documentation is complete and approved in the QA Center, go to OASIS Ready for Export. Within the OASIS Export Screen, sort and filter by the below items and column headers.

- Branch - Filters by location/branch (if more than one).
  - Check/Uncheck All - Enables the user to check/uncheck all OASIS currently filtered to allow for batch saving of documents.
  - By selecting these column headers, users can sort the list in ascending or descending order.
    - Client Name
    - Assessment Type
    - Assessment Date
    - Care Period
  - **Excel Export** - This function enables the generated list to be exported to Excel for further analysis.
1. Check the boxes the OASIS records to submit.
  2. Select **Generate OASIS File**.
  3. Generates a zipped XML file. Choose **Save File**.
  4. Select **OK**.
  5. The file saves to the downloads folder on your computer. Create an OASIS submissions folder on the computer and drag and drop there.
  6. Upload file to CMS (QIES/QTSO) <https://qtso.cms.gov/>

## **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 organizations' ability to bill.

1. Select checkboxes of generated OASIS.
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/OASIS Management/Exported OASIS* or *Not Exported OASIS* to view/edit.

For both Exported and Not Exported OASIS windows, a grid will populate with the below available filters:

- Branch - Filters by location/branch (if more than one).
- Status - Defaults to active clients. The status may be changed to view all or discharged clients.
- **Excel Export** - This function enables the generated list to be exported to Excel for further analysis.

### **OASIS CORRECTIONS - KEY FIELDS**

*View/OASIS Management/Exported OASIS*

If an error has been made in one or more key fields, or if an assessment was submitted in error, a cancellation should be generated and submitted to CMS.

1. Select the **Generate Cancel** hyperlink.
2. Generates a zipped XML file. Select to **Save File**.
3. The file saves to the downloads folder on your computer. Create an OASIS corrections folder on the computer and drag and drop there.
4. Upload file to CMS (QIES/QTSO) <https://qtso.cms.gov/>

Once the cancellation has been accepted by CMS:

1. Select the **Reopen** hyperlink.
2. Enter the Reason.
3. Select **Yes**.
4. Go to *Clients/Client Center* and find the patient/OASIS.
5. Select the OASIS to reopen.
6. Complete the required updates to OASIS. **NOTE:** Only the assigned clinician will have the ability to make the update. Pending specific organization policy, select *Action Menu/Details/Assigned To* to update the user assigned to this task.
7. Select **Save & Continue**.
8. OASIS goes back to QA for approval.

Once approved by QA, go to *View/OASIS Management/OASIS Ready for Export*

1. Select the **Edit** hyperlink.
2. Change the Correction Number to "01."
3. Select **Save**.

## 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 CMS accepted the OASIS, 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 **the Reopen** hyperlink.
2. Enter the reason.
3. Select **Yes**.

Go to *Client/Client Center* to find the patient/OASIS.

4. Select the OASIS to reopen.
5. Complete the required updates to OASIS.
6. Select **Save & Continue**.
7. OASIS goes back to QA for approval.

Return to the OASIS Export screen.

8. Select the **Edit** hyperlink.
9. Choose the correct correction number.
10. Select **Save**.
11. Continue to the export process outlined above.

## KEY VS. NON-KEY FIELDS

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

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 Organization ID code
Assessment Event Finders:	
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

### *Help/Help Center*

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos of all of Axxess' products. It can be accessed by going to:



Or also available at <https://www.axxess.com/help/>

