

OASIS Unlocking

FAQ

Prepared for

myUnity Essentials Financial



Netsmart

www.ntst.com

11100 Nall Avenue
Overland Park, KS 66211
800.842.1973

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Overview

If an OASIS has been marked as exported in Billing, it needs to be unlocked prior to making changes in Clinical. Failure to do so will cause the OASIS to decline in the Clinical Integration log with a message “OASIS has already been sent to State.”


If the OASIS has *not* been marked as Exported in Billing for transmission to the State (assessment is in a ‘Locked Awaiting Export’ status), go straight to Clinical to make the changes and re-export the OASIS to Billing. There is no need to unlock the OASIS in that instance.

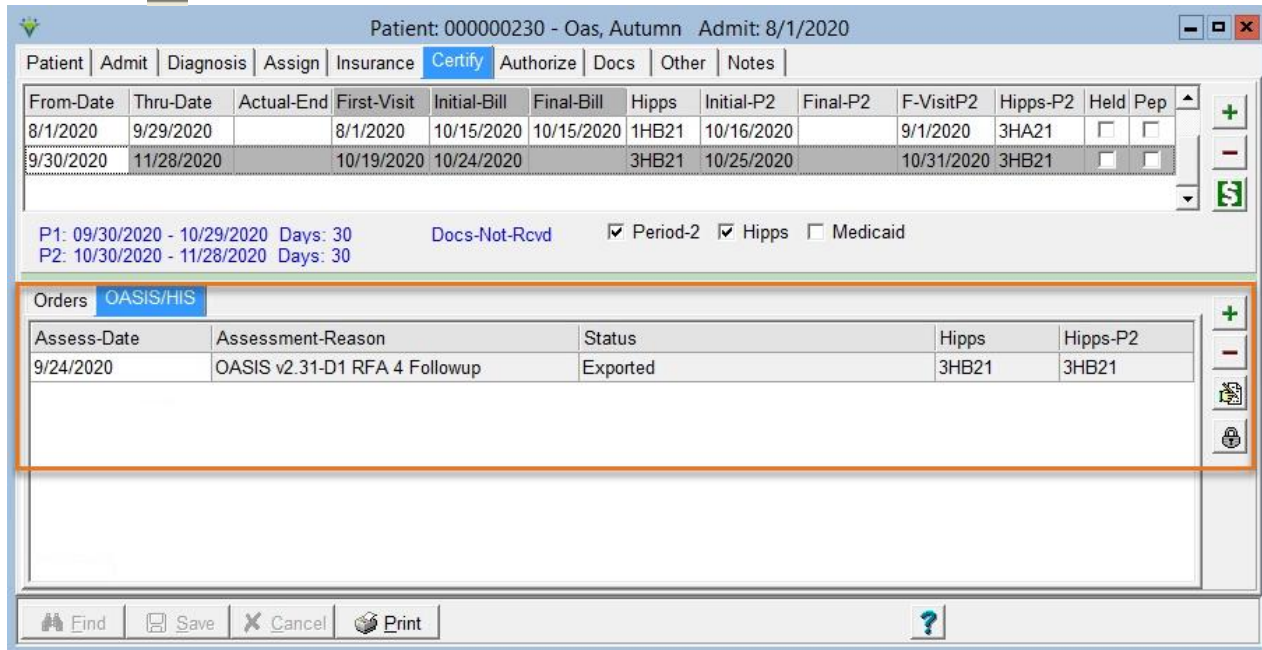
Unlock Process

Go to **Patient > Admit/Maintain** (or press the **Patients** button). Press **Find** to search for and select the patient.

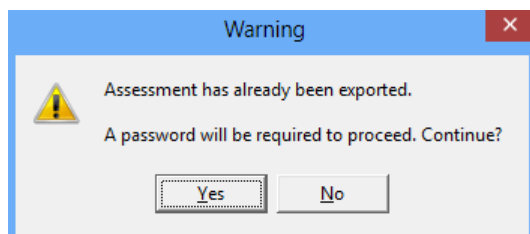
Click the **Certify** tab. Select the cert record under which the assessment was done.

On the **OASIS/HIS** tab on the lower half of the window, click on the assessment to be unlocked.

Click the  **Unlock** button to the lower right.



Press **Yes** to unlock the assessment and enter the Master Password (check with your System Administrator for the password if unknown).



Select the Unlock reason.

- Correction Requiring State Correction Count Increment: Use for non-key field changes if assessment accepted by the State (see list of key fields listed below).
- Correction Not Requiring State Correction Increment: Use to correct internal mistakes prior to sending to State or if assessment was rejected by the State.
- Inactivate Selected Assessment: Use to inactivate an assessment due to wrong RFA chosen or to remove/delete the record from the State database.



Key Fields:

(M0010) Agency ID

(M0030) Start of Care Date (This is a key field only where RFA=01.)

(M0032) Resumption of Care Date (This is a key field only where RFA=03.)

(M0040) Last Name

(M0040) First Name

(M0064) Social Security #

(M0066) Birth Date

(M0069) Gender

(M0090) Date Assessment Completed (This is a key field only where RFA=04 or 05.)

(M0906) Discharge/Transfer/Death Date (This is a key field only where RFA=06, 07, 08, and 09.)

Press **OK** once you've made the selection and press **Save**. The assessment will be in 'Awaiting Validation' status.

Patient: 00000230 - Oas, Autumn Admit: 8/1/2020 - Browse

Patient | Admit | Diagnosis | Assign | Insurance | **Certify** | Authorize | Docs | Other | Notes

From-Date	Thru-Date	Actual-End	First-Visit	Initial-Bill	Final-Bill	Hipps	Initial-P2	Final-P2	F-VisitP2	Hipps-P2	Held	Pep
8/1/2020	9/29/2020		8/1/2020	10/15/2020	10/15/2020	1HB21	10/16/2020		9/1/2020	3HA21	<input type="checkbox"/>	<input type="checkbox"/>
9/30/2020	11/28/2020		10/19/2020	10/24/2020		3HB21	10/25/2020		10/31/2020	3HB21	<input type="checkbox"/>	<input type="checkbox"/>

P1: 09/30/2020 - 10/29/2020 Days: 30 Docs-Not-Rcvd Period-2 Hipps Medicaid
 P2: 10/30/2020 - 11/28/2020 Days: 30

Orders **OASIS/HIS**

Assess-Date	Assessment-Reason	Status	Hipps	Hipps-P2
9/24/2020	OASIS v2.31-D1 RFA 4 Followup	Awaiting Validation	3HB21	3HB21

Find Save Cancel Print ?

Correct the assessment in Clinical, re-validate, and re-export it to Billing. The corrected record comes over in 'Locked Awaiting Export' status and is ready to be picked up in an OASIS export file for transmission to the State. If you Inactivated the assessment, you will end up with 2 records – the original Inactivated record and a new record with the changed information. Both need to be exported to the State.

Example:

Patient: 00000230 - Oas, Autumn Admit: 8/1/2020 - Browse

Patient | Admit | Diagnosis | Assign | Insurance | **Certify** | Authorize | Docs | Other | Notes

From-Date	Thru-Date	Actual-End	First-Visit	Initial-Bill	Final-Bill	Hipps	Initial-P2	Final-P2	F-VisitP2	Hipps-P2	Held	Pep
8/1/2020	9/29/2020		8/1/2020	10/15/2020	10/15/2020	1HB21	10/16/2020		9/1/2020	3HA21	<input type="checkbox"/>	<input type="checkbox"/>
9/30/2020	11/28/2020		10/19/2020	10/24/2020		3HB21	10/25/2020		10/31/2020	3HB21	<input type="checkbox"/>	<input type="checkbox"/>
11/29/2020	1/27/2021										<input type="checkbox"/>	<input type="checkbox"/>

P1: 11/29/2020 - 12/28/2020 Days: 30 Docs-Not-Rcvd Period-2 Hipps Medicaid
 P2: 12/29/2020 - 01/27/2021 Days: 30

Orders **OASIS/HIS**

Assess-Date	Assessment-Reason	Status	Hipps	Hipps-P2
11/24/2020	OASIS v2.31-D1 RFA 4 Followup	Inactive	3AHKS	
11/24/2020	OASIS v2.31-D1 RFA 4 Followup	Locked Awaiting Export		

Find Save Cancel Print ?

Follow the steps in the [OASIS Export FAQ](#) to upload corrected assessments to iQIES.