

OASIS/HIS Export

Guide

Prepared for

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OASIS/HIS Export

The OASIS/HIS Export provides the ability to create an export file of OASIS assessments or HIS records ready for submission to the State system.

Go to Clinical > OASIS/HIS Export.

CMS Data Export | Specific Includes | Unpost Files

From: 2/28/2019 To: 2/28/2020

File Location: OASIS02-28-2020.zip

Test-Submission: ☐ Export-Unlocked-Only: ☐ Log-Trans: ☐ HIS-Data: ☐

CMS Agency Information

Unique Agency State ID: NJ123111 (OASIS1)

Name: ABC Home Health Care

Medicare ID (M0010): 543210

NPI : 9876543210

Preview Print Post ?

Creating the Export File

From and To Dates: Enter a date range encompassing the assessment dates. It is recommended to use an early From date to capture late or changed assessments for submission.

File Location: Assign a unique file name for each file that is created with a .ZIP extension.

Test Submission: Should only be selected if sending test files to ASAP with your assigned Testing ID or if creating a file for benchmarking software. Checking this box causes the assessment to not get marked as exported.

Export Unlocked Only: Check if creating OASIS export files to submit to a benchmarking vendor only or creating a test file. This will pick up assessments that are in an Unlocked status.

Log Transactions: If selected, OASIS postings will be written to the System Log.

HIS Data: Check the option if creating an export file for HIS records. For OASIS files leave the box unchecked.

Unique Agency State ID: Select your agency's ID number (as setup in File>File Maintenance>Entity>OASIS Agency Type>Other-Info tab). If this number is changed after an assessment has been entered, that assessment must be edited in Clinical and re-posted to Billing to write the correct agency ID to the assessment record).

Preview or Print: Review the OASIS or HIS Export report to confirm which records will be included in the export file.

Post: Once previewed or printed, the Post button will be enabled on the CMS Data Export tab. The export file is not created until successfully Posted. The user can then upload the file. Note: if entering a specific patient on the Specific Includes tab, manually clear the selection when done so all patients/records are available for export next time.

Submitting the Export File

OASIS - Starting 1/1/2020 all OASIS assessments must be submitted to iQIES:

<https://iqies.cms.gov/users/home> .

HIS - HIS records are submitted to the QIES ASAP system until no sooner than CY 2021, when all QIES functions will be transitioned to the new iQIES system.

Un-posting an Export File

An export file should not be Un-Posted unless the entire file needs to be re-created (for example, an issue occurred during original file creation or the entire file rejected). Un-locking of individual patient OASIS or HIS records is done from the Patient file.

Click on the Unpost Files tab.

Highlight the export file to be unposted and press the **Unpost** button. To unpost a HIS file, the HIS Data box must be checked on the CMS Data Export tab first.

To select files older than 90 days, click the **+Older** button.

CMS Data Export

CMS Data Export | Specific Includes | Unpost Files

| Export_Date | Export_filename |
|-------------|---------------------|
| 3/12/2021 | OASIS02-28-2020.zip |

| Status | Status_Date | Code | Name | RFA | Date | Ass |
|----------|-------------|--------|-----------------|-----|------------|-----|
| Exported | 3/12/2021 | 131515 | Metcalf, Laurie | 4 | 01/27/2020 | OAS |
| Exported | 3/12/2021 | 131616 | Allyn, Alan | 1 | 11/01/2020 | OAS |
| Exported | 3/12/2021 | 131128 | Splitt, Mel | 1 | 11/06/2020 | OAS |

☐ Do Not Unpost Records Already Accepted by CMS Status: Exported
☐ Manually Edit CMS Status Status Date: 3/12/2021
☒ Edit Status for Selected Record
☐ Edit Status for ALL Records

Preview Print + Older ↶ Unpost ?

After clicking **Unpost**, enter the Master Password, and if the criteria for unposting a file has been met as described below, press "No" in the confirmation window.

Confirm

Are you sure you want to unpost all records for file OASIS02-28-2020.zip exported on 2/28/2020?
 If this file was already submitted and accepted, visits should be unlocked individually through Assessment Entry in the Patient screen.
 Failure to do so will result in state duplication rejections.
 Cancel Unpost?

Yes No