

Unlocking HIS Records

Prepared for

myUnity Essentials Financial



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Overview

HIS Admission and Discharge records that are submitted to iQIES and rejected need to be unlocked in the Billing Module prior to making corrected in the Clinical record.

Unlock the HIS Record

In the Billing Module, go to **Patient > Admit/Maintain to Find** and select the patient.

Click on the **Certify** tab and select the certification period for the HIS record.

Click on the **OASIS/HIS** tab on the lower half of the screen.

Press the  **Unlock** button.

On the Unlock screen, choose the unlock reason based on the changes being made.

Option 1: Use for non-identifier field changes if the record has already been accepted by the State ASAP system.

Option 2: Use to correct internal mistakes prior to sending to State or if the record was rejected by the State.

Option 3: Use to inactivate the HIS due to change in a Record Event or Patient Identifier (see below) or to remove/delete the record from the State database if submitted in error.

Record Event Identifiers:

- A0220: Admission Date (on a HIS-Admission record A0250 = 01)
- A0250: Reason for Record
- A0270: Discharge Date (on a HIS-Discharge record A0250 = 09)

Patient Identifier:

- A0500A: First Name
- A0500C: Last Name
- A0600: Social Security Number (SSN)
- A0800: Gender
- A0900: Birth Date

Press **OK**, close the window and press **Save**. The HIS record will be in in 'Awaiting Validation' status.

Correct the HIS Record

Make the necessary changes to the record in the **Clinical Patient Chart** and repost the updated record to the Billing Module.

The record comes over in a 'Locked Awaiting Export' status and is ready for re-submission to the State via the **Clinical > OASIS/HIS Export** menu.

If option 3 Inactivation was chosen, there will be 2 records ready for submission to State, the Inactivation record and the new record with the corrected information.