Quick Reference: OASIS File Management

Review "OASIS Information to Excel" report at minimum once a week

Use report to identify OASIS files that are incomplete. Pay particular attention to the following:

• Status of Oasis: Incomplete, Reviewed, Exported.

• For column N, numbers 01-04 require HIPPS code and claim key.

• Verify 01-04 type assessments have HIPPS and claim key info before exporting (HIPPS code and claims key can found under P, Q, and R columns).

• Column L determines if the file is marked as transmittable. Transmittable files are typically for M0150 payer types 1-4 and are typically uploaded to iQIES.

Review incomplete OASIS files and mark when ready for submission

Use the OASIS Information to Excel report to identify OASIS files that should be completed.

1. Navigate to the client's record and select **Case Details > OASIS** and select **Edit**.

2. Review for important data items like correct SOC date, correct cert period date, and diagnosis codes.

3. When all information is correct, the OASIS file is ready to send to CMS.

   • Mark the file as yes/no transmittable based on M0150 payer types. Note that 1-4 should typically be marked Yes as transmittable to CMS.

   • Mark the file as **Reviewed** at the bottom left of the screen.

4. Go through any OASIS files listed on your report and prepare as many files for export as you want.

   Tips:

   • OASIS files marked as Reviewed and YES as transmittable will pull into the export file but will NOT satisfy the claims console until the file is exported.

   • OASIS files marked as Reviewed and NO as transmittable, will NOT pull into the export file but will satisfy the claims console item as soon as the OASIS is in a Reviewed status.

Export OASIS Files

1. When you have all the files you want to export in a reviewed status and marked YES as transmittable, go to **Agency > Exports > OASIS**.

2. Select the correct business line from the drop down and select **Generate Report**. These queues up the report. (Queuing up the report can take 15-30 minutes. You can navigate away and work on other tasks while the report is generating.)

3. The generated report appears on the **Agency > Exports > OASIS** tab, with the most current file on top.

4. Select **Download Report** and save the file to your designated location (desktop or designated file folder).

5. Navigate to iQIES, login, and upload the file.

Enter Acceptance ID from FVR

When you receive the File Validation Report (FVR) from iQIES, enter the Acceptance ID from the FVR report to finalize the clinical requirements.

1. Go to the client's chart > Case Details > OASIS and select **Add Assessment ID**.

2. Enter the Assessment ID and click **Accept**.