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Empowering Exceptional Care

Back Office-General Quick Reference Guide

OASIS Reviewer

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Use the OASIS Console/Reviewer

When the clinician completes an OASIS assessment at the appropriate time points in a patient's episode, HCHB Back Office generates a task for you to edit and lock the OASIS. Depending on your agency's settings for the OASIS Alert feature, any changes you make could be sent back to the assessing clinician to accept or decline through PointCare. If your agency has not elected to use this setting, then you need to communicate any suggested changes with the assessing clinician prior to updating the OASIS . If there are no changes, you can lock the OASIS and prepare it to send to the State. You track, edit, and batch OASIS assessments to send to the State from the OASIS Console.

Common Buttons & Icons

OASIS Console button

Load button
*You must click this button to load any filter or search changes

Change Status button (Allows you to change the status of an OASIS assessment)

Edit Details button (Allows you to edit OASIS answers for assessments in Unlocked, Rejected, Non-Key Field Correction, Key Field Correction, or Inactivated status)

Submission History button (Allows you to view the history of status changes made to the assessment)

Change History button (Allows you to see the history of changes to answers within the assessment)

Reports button (Allows you to view several different OASIS reports)

Create Files button (Allows you to batch OASIS files and prepare them to send to state)
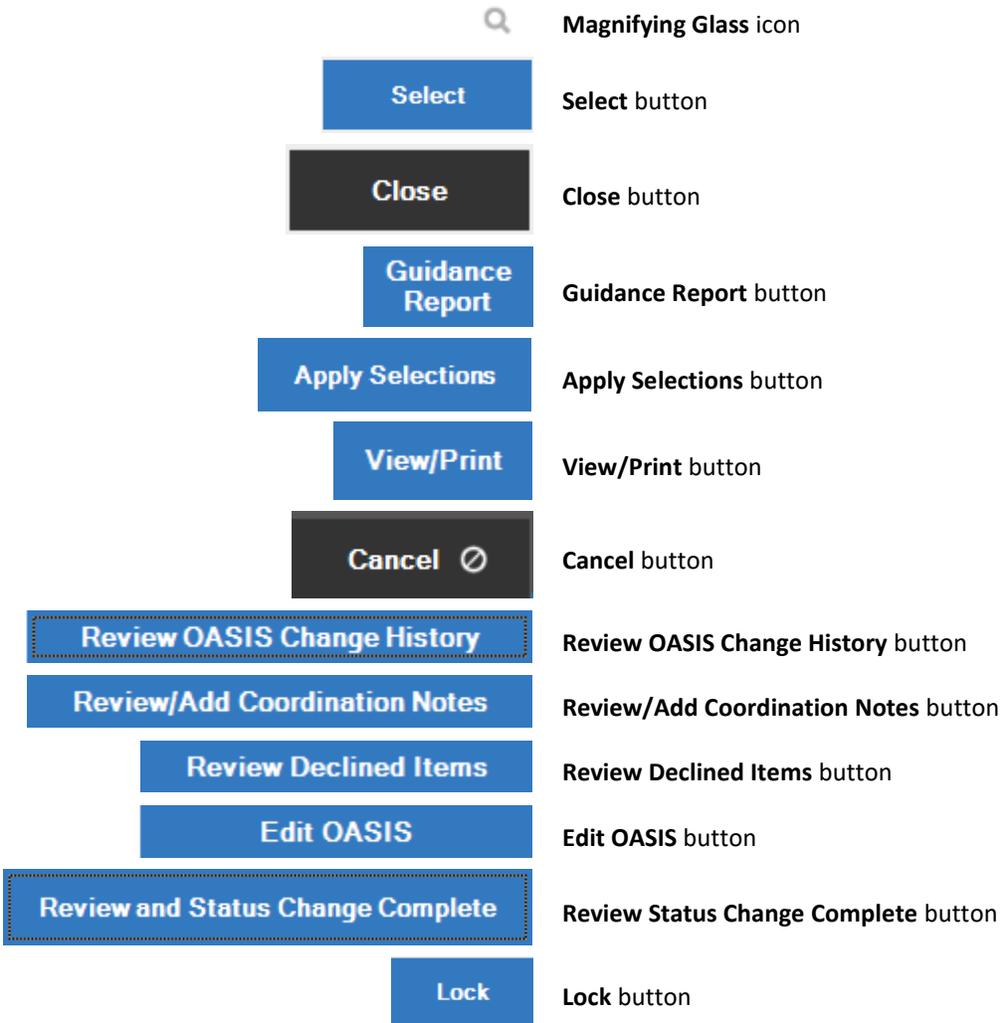
Edit/Lock OASIS button

Edit Answer button

Save & Close button

	Magnifying Glass icon
Select	**Select** button
Close	**Close** button
Guidance Report	**Guidance Report** button
Apply Selections	**Apply Selections** button
View/Print	**View/Print** button
Cancel ⊘	**Cancel** button
Review OASIS Change History	**Review OASIS Change History** button
Review/Add Coordination Notes	**Review/Add Coordination Notes** button
Review Declined Items	**Review Declined Items** button
Edit OASIS	**Edit OASIS** button
Review and Status Change Complete	**Review Status Change Complete** button
Lock	**Lock** button

Edit and Lock OASIS

From the Patient Related Tasks tab in the Worker Console:

1. Double-click **EDIT/LOCK OASIS**.

   Note: You have the option to review the Home Health Case Mix Details and Insight Report and the Home Health Utilization Summary, if desired. These activities are not required in order to stage complete the task.

2. To lock the OASIS, click **Edit/Lock OASIS**. The Review/Edit OASIS window displays all of the OASIS questions and answers.
3. Review the OASIS.
4. If there are no changes, click **Lock** to lock the OASIS and stage complete the task.
5. To modify an answer, click the OASIS item number.
6. Click **Edit Answer**.

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Note: If your agency has elected to use the OASIS Alert feature, a message will display reminding you that you must enter a reason for any changes you make. If your agency has not elected to use the OASIS Alert feature, the message will require you to confirm that you have communicated with the assessing clinician on this change.

7. Confirm the change.
8. Enter the new answer.
9. Click **Save & Close**. The Reason for OASIS Answer Change window displays.
10. Click the **Magnifying Glass** icon in the **Reason for Change** field.

    Note: A list of possible change reasons displays. Your agency may choose to add or edit these reasons.

11. Click the appropriate answer.
12. Click **Select**.

    Note: If desired, you can enter additional explanation in the Option Details field.

13. Click **Save & Close**.

    Note: Notice that the Close button changed to Save & Close; you cannot lock the OASIS until the clinician accepts your changes.

14. Change additional answers as needed.

    Note: You can click Change History to view a list of all questions that have been changed. If your agency has purchased an interface with SHP, the last button allows you to log on to SHP and access your reports. If your agency is not using the OASIS Alert feature, you will simply close the Review/Edit OASIS window.

15. Click **Save & Close**.
16. Click **Yes** to run validations.

    Note: If consistency violations exist, an OASIS Validation Error report containing a list of the violations and the suggested corrections will display. These must be corrected prior to saving the Pending OASIS changes.

17. Click **OK**. You return to the task window.
18. Click **Close**.

    Note: The OASIS cannot be locked while there are outstanding Pending or Declined changes.

View OASIS Reports

From the Review/Edit OASIS window:

1. Click **Reports**.
2. Click the **Select OASIS Reports to Print** drop-down arrow; then select the check box(es) next to the report(s) you want to view.
3. Click **Done**.

4. Click **Print**.

View the Guidance Report

From the Review/Edit OASIS window:

1. Click **Guidance Report**.
2. Click the **Magnifying Glass** icon in the **M0 Number** field.

   Note: A list of OASIS questions displays. You can select multiple questions or just one, depending on what you are looking for.

3. Select the questions for which you want to view explanations.
4. Click **Apply Selections**.
5. Click **View/Print**.

   Note: The OASIS Guidance Report displays for the selected questions, with a detailed explanation of each question.

6. After reviewing the report, click the **Close** button.
7. Click **Cancel** to close the window.

Follow Up on Pending OASIS Changes

From the Patient Related Tasks tab in the Worker Console:

1. Double-click **FOLLOW UP ON PENDING OASIS CHANGE**.
2. Click **Review OASIS Change History**.
3. Review the change history; then click **Close**.
4. Click **Review/Add Coordination Notes**.

   Note: Click a note in the upper grid to display the note details below.

5. Click **Close**.
6. To close the task window, click **Cancel**.

   Note: This task will automatically disappear when the clinician accepts or declines the changes and then syncs.

Review Declined OASIS Item

1. Double-click **REVIEW DECLINED OASIS ITEM**.
2. Click **Review Declined Items**. The View OASIS Edits window displays.
3. Review the changes; then click **Close**.
4. Click **Edit OASIS**.
5. Make changes to the OASIS as needed.

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Note: You can edit the OASIS assessment to either revert back to the original OASIS answers or to suggest a new edit based on the clinician's comments and discussion.

6. Click **Save & Close**.
7. Click **Yes** to run validations.

Note: If consistency violations exist, an OASIS Validation Error report containing a list of the violations and the suggested corrections will display. These must be corrected prior to saving the Pending OASIS changes.

8. Click **OK**.
9. Click **Review and Status Change Complete**.

Note: Refer to the Follow Up on Pending OASIS Change task if new changes are made.
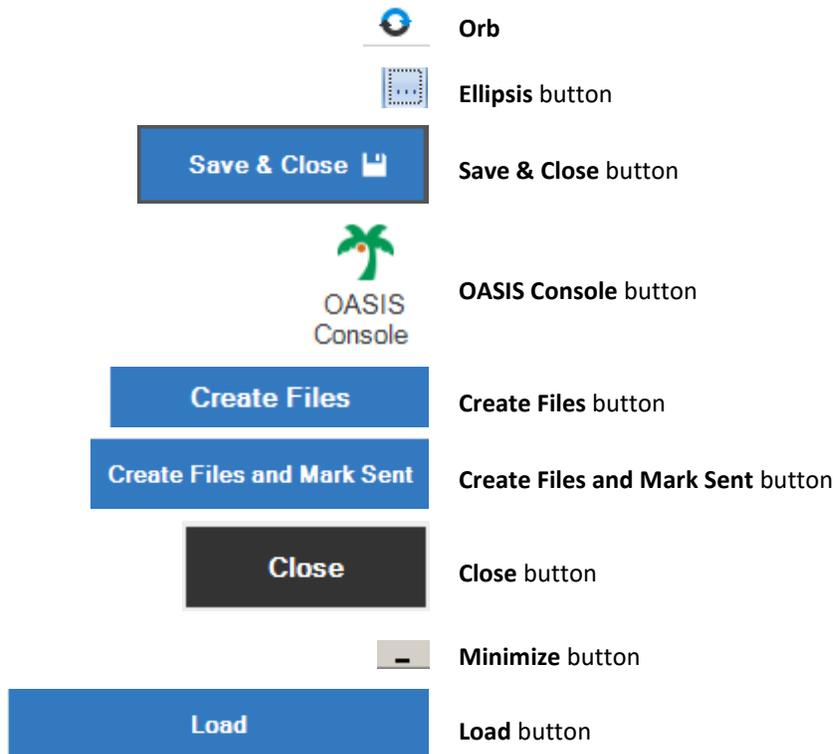
View OASIS Assessments

From the Clinical Manager tab on the Home screen:

1. Click **OASIS Console**.
2. Select the appropriate filters on the left.
3. Click **Load**.
4. Right-click an OASIS assessment or use the buttons at the bottom to edit/view OASIS information as needed.

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Batch OASIS Files and Send to State

When OASIS files are ready to send to the state, you can create batch files from within the OASIS Console. Login Profile Settings allow you to designate a folder on your desktop where files are sent, and then you can upload the files to the appropriate channels. Afterwards, you return to the Console to document whether each file was accepted or rejected.

Common Buttons & Icons

Icon	Description
	Orb
	Ellipsis button
Save & Close	**Save & Close** button
OASIS Console	**OASIS Console** button
Create Files	**Create Files** button
Create Files and Mark Sent	**Create Files and Mark Sent** button
Close	**Close** button
	Minimize button
Load	**Load** button

Set Up the Default Folder for Batches

From your computer desktop:

1. Create a batch folder on your desktop.
2. Log on to HCHB Back Office.
3. Click the **Orb**.
4. Click **Login Profile Settings**.
5. Click the **Files** tab.
6. Click **…** in the OASIS section to search for the OASIS batch folder on your desktop.
7. Locate and select the OASIS folder.
8. Click **OK**.

Note: The Allow Folder Selection When Sending OASIS check box causes the system to ask you where you want to send batch files every time you create a batch; leave this check box unchecked to automatically send all batch files to the selected folder on your desktop.

9. Click **Save**.

Create an OASIS Batch

From the Clinical Manager tab on the Home screen:

1. Click **OASIS Console**.
2. Select the appropriate filters on the left.

   Note: To make it easier to batch locked files, select Locked in the Status drop-down menu.

3. Click **Load**.
4. Click **Create Files**.
5. Click the **NPI filter** icon; then select the check box next to the NPI number you would like to view.
6. Click **OK**.
7. Select the OASIS assessments you want to batch.
8. Click **Create Files and Mark Sent**.
9. Click **OK**.
10. Continue creating batch files for each NPI number.
11. When all batch files are created, click **Close**.
12. To minimize the console so you can view the file on your desktop, click the **Minimize** button.
13. Double-click the OASIS folder on your desktop.
14. Open the CMS website.
15. Upload the appropriate OASIS files to the state.

    Note: The file name begins with the word OASIS, followed by the date. The next numbers represent the time the file was generated in hours, minutes, and seconds. After the underscore is the NPI number.

16. Click the **Close** button.

Update the File Status

From the OASIS Console:

1. Change the filters to view items in Sent status.
2. Click **Load**.

   Note: Referring to the Validation report, update the status of each file to Accepted or Rejected. It is easiest to mark the rejected files first and then mass-accept the rest.

3. Right-click the **OASIS** file you need to reject.
4. Hover over **Change Status**.
5. Click **Reject**.
6. Continue rejecting files as needed.
7. After you have updated the status of all rejected files, click and drag to highlight all remaining files.
8. Right-click the highlighted items.
9. Hover over **Change Status**.
10. Click **Accept**.
11. To view and modify accepted files, change the status filter to Accepted.
12. Click **Load**.

    Note: If you need to modify a file that has been accepted, you can click the Change Status button at the bottom of the screen or use the right-click method, then click Modify Change: Key Field Correction or Non-Key Field Correction to make the changes. If you make any changes, you must resubmit the file to state. The Revision number is updated to let the state know that this is a new version of the file.

13. To close the OASIS Console, click **Close**.