



User Tips and Hints

OASIS Transmission scenarios and steps:

1. Send Active (ready to send OASIS which are in the Locked status)

- User goes to OASIS Transmission page. The default loading of the page shows that of all Active (ready to send) and Locked OASIS assessments. The user can select only certain ones or just click Format and it will select all for formatting into a Transmission file.
- Another pop-up window will appear to let the user know if the formatting was successful and the Send button can be used to initiate the Dial-up procedure to CMS. After successful transmission, the user should select "Close Batch" on this pop-up. They will be presented with a Listing of sent Assessments and they can exit
- Once Sent, the assessment no longer appears on this page, but can be accessed by clicking on the "Sent" radio button. From the Visit Management page, the user will be able to see that the assessment was sent because there will be an 'S' in the "Trans" column of the grid

2. User needs to send an Inactivation record

- From the OASIS Transmission page, select the "Sent" radio button. Another pop-up appears to enter search criteria for which sent assessment(s) are desired. Enter the patient number, or other criteria and select OK (same as Claims page). The list of Sent assessments is now listed on the main page.
- Choose the one or many you wish to Inactivate and select "Inactivate" from the "Choose Reason" dropdown list and click the "Re-Open" button.. You will see a confirmation msgbox that warns that the assessment(s) will be set back to Active (ready to send) and marked as an inactivation type record. Press OK to accept, Cancel to cancel.
- The assessment(s) will disappear from the Sent list, but if you click on the Active radio button, you should see the assessment(s) listed there, as it is ready to send again, but status is now "I" for Inactivation. It will be sent to the state as an Inactivation for a previously sent assessment.
- To send it this way, proceed as normal by selecting the assessment(s) and clicking on "Format" button.

3. User received a Header Fatal Error

- If you receive a Header Fatal Error, there most likely needs to be a change to Agency set up. You should figure out what this is and correct it. To reset and retransmit the assessments included in that file, go to OASIS Transmission page and click on the "Sent" radio button. You can use the Date transmitted to pull all the appropriate ones.
- After you get a list of assessments, you can select them all and choose "Header Fatal Error" from the Choose Reason dropdown box, then select "Re-open". You will see a confirmation msgbox that warns that the assessment(s) will be set back to Active (ready to send). Press OK to accept, Cancel to cancel.
- The assessment(s) will disappear from the Sent list, but if you click on the Active radio button, you should see the assessment(s) listed there, as it is ready to send again. To send them again, after Agency (header) issue is believed to be resolved, proceed as normal by selecting the assessment(s) and clicking on "Format" button.

4. User received an Assessment Fatal Error

- If you receive an Assessment Fatal Error, then something with the particular assessment must be corrected. You should Cut or copy the rejection error that the state has supplied to record with the assessment within ClinicPro.
- To do this, Go to the OASIS Transmission page, and select "Sent" radio button to enter search criteria to bring up the particular error-ed assessment. Once it is in the list, select it, then choose "Assessment Fatal Error" from the Choose Reason dropdown box, and select the "Re-open" button. You will see a confirmation msgbox that warns that the assessment will be re-opened for editing from Visit Management. Press OK to accept, Cancel to cancel.

- Once OK is selected, the Transmission Error(s) pop-up will appear. In here you should paste the errors received from the state about the particular assessment. This pop-up will be visible from Visit Management with the assessment and can be used by the clinician to make the appropriate correction to the assessment and re-close the assessment. Therefore, the assessment will disappear from the Sent list and will not be available in the Active list until it has been re-closed from Visit Management.

5. User needs to Manually adjust Correction Number

- If there becomes an issue where the state and the ClinicPro system have become mismatched on the Correction Number, there is a way to manually change it in ClinicPro.

- Go to the Oasis Transmission page and click the Sent radio button. After finding the assessment that needs adjusting, select it and click on the "Correction" button.

- This will bring up a pop-up window that displays the current Correction number and allows it to be changed and saved.

- Then Choose "Header Fatal Error" and Re-open button in order to set the assessment back to the Active (ready to send) status.

6. To Make a change to an already sent Assessment

When Re-Opening an assessment from Visit Management where the Trans column has an "S" for "Sent", the Correction Number is automatically incremented by 1, in order to tell the state that this transmission is an correction. So, nothing different has to be done. Once Re-locked, it will appear in the OASIS Transmission page as an Active (ready to send) assessment.

****Note for those assessments that are rejected due to not being masked because insurance was unknown at the time the assessment was locked, use the Assessment Fatal Error button to re-open it and pull in the corrected insurance. This way the correction number will not increment.**