

# OASIS-E2 Assessment Checklist

Work through it in visit order. Every item you check here is one less correction from QA.

## Before the visit

- ☐ Review the referral packet, prior assessments and hospital discharge summary
- ☐ Confirm the time point: SOC, ROC, Recertification, Transfer or Discharge
- ☐ Note the completion and submission deadline for that time point
- ☐ Confirm your EMR is on the OASIS-E2 form version
- ☐ Review medications, recent results and the likely primary diagnosis

## History and demographics

- ☐ Verify demographics, payer and Medicare ID
- ☐ Document caregiver presence and support
- ☐ Reconcile the medication list with the patient or caregiver

## Clinical items (M-items)

- ☐ Primary diagnosis backed by clinical findings you observed
- ☐ All secondary diagnoses captured (they drive the PDGM comorbidity adjustment)
- ☐ Homebound status supported with specific evidence
- ☐ Skilled need stated with a specific service justification
- ☐ M1800 to M1860 and M1033 agree with what you saw (they set the PDGM functional level)

## Section GG: function

- ☐ Score each GG item on the 6-point scale from usual performance
- ☐ Use the activity-not-attempted codes only where they apply
- ☐ Code performance at the right time point: SOC/ROC, follow-up, or discharge
- ☐ GG scores match how the narrative describes the patient's function

## Cognition, mood and behavior

- ☐ BIMS administered per CMS instructions
- ☐ PHQ-2 to 9 screening administered per CMS instructions
- ☐ Behavior frequency and impact items documented

## Social determinants of health

- ☐ Every social determinants item on your time point completed (transportation is SOC/ROC only)
- ☐ Patient-declined responses coded as declined, with the attempt noted

## After the visit, before you submit

- ☐ OASIS responses agree with the visit narrative
- ☐ Primary diagnosis matches the claim and maps to a clinical group
- ☐ No internal conflicts between items
- ☐ No item skipped without a reason
- ☐ Completed and submitted inside the time-point window

Reference only. The CMS OASIS-E2 Guidance Manual (effective April 1, 2026) is the authoritative source. Adapt this list to your agency's policies and EMR.

# OASIS-E2 QA Review Checklist

For the reviewer reading the chart after the visit. Work top to bottom and log every edit.

## Timing and setup

- ☐ Correct time point for the visit
- ☐ Assessment inside the completion window
- ☐ Submission inside the CMS window

## Diagnoses and payment

- ☐ Primary diagnosis supports the PDGM clinical group
- ☐ Primary diagnosis is an acceptable primary code
- ☐ Secondary diagnoses support the comorbidity adjustment
- ☐ Diagnoses supported by documentation in the chart

## Function

- ☐ Section GG scores match the narrative
- ☐ M1800 to M1860 responses agree with GG and the narrative
- ☐ M1033 risk-of-hospitalization responses are supported

## Clinical consistency

- ☐ Medication list matches the clinical findings
- ☐ Wound and pressure injury items match the wound documentation
- ☐ BIMS and PHQ administered and scored correctly
- ☐ SDOH items complete

## Close-out

- ☐ Every edit discussed with the clinician
- ☐ Rationale for each edit documented
- ☐ Recurring errors logged for education

## Track these each month

| Measure                        | This month |
|--------------------------------|------------|
| Charts reviewed                |            |
| Charts returned for correction |            |
| Most-corrected item            |            |
| Average days to submission     |            |

**Reviewing every chart by hand?** Lime's Sentinel QA reviews every visit note automatically and sends findings to your QA team with the evidence for each one. [getlimeai.com/sentinel-qa/](https://getlimeai.com/sentinel-qa/)