How to Authorize & Bill for Taxi services or Transit ride tickets/tokens in eXPRS Plan of Care (POC)
(updated 6/18/2018)

In many areas of the state, public mass transportation services are very limited or unavailable. This necessitates the utilization of Taxi services for an individual’s non-medical, community transportation needs for some individuals. Those taxi services can currently be authorized in eXPRS Plan of Care under the below procedure codes utilizing the “generic” provider.

• OR003 - Transportation Commercial Provider (not avail under SE257)
• OR554 - Transportation Transit Pass

This assistance guide will outline steps for Case Management Entities (CMEs) to successfully authorize and then submit billings for taxi services or transit ride tickets/tokens in eXPRS/POC in alignment with ODDS transportation services policy.

➔ Please note: both procedures codes OR003 & OR554 are authorized using the “generic” provider option, meaning the services are billed by & paid to the authorizing CME, who then forwards payment to the appropriate transportation vendor.

Users must have the applicable POC Manager role for their CME organization to do this authorization work.

To authorize Taxi services or Transit tickets/tokens in POC:

1. Login in to eXPRS. If users have more than one organization login option, they will need to be logged in under the Local Authority (for CDDPs shown below)
or Contractor (for Brokerages) Organization role.

2. From the left-hand yellow navigational menu click on Plan of Care ➔ POC ➔ View POC or Update POC to find the POC that needs to have authorizations added.

➔ PLEASE NOTE: To create a new Plan of Care, please see the assistance guide How to Create a Plan of Care on the eXPRS Help Menu.

3. In the Find Plan of Care page, search for the POC that the authorization is to be added. At least one search criteria option must be entered.
4. From the search results, open the POC for which transportation authorizations are needed. Click **Edit** at the bottom of the POC, if needed, to open the POC fields for editing.

5. Click **Add Plan Line** at the bottom of the POC to add the new authorization.

6. For Taxi services or Transit tickets/tokens, use procedure code **OR003- Comm Transp, Commercial** or **OR554-Transportation Transit Pass**. Proceed with building the plan line.

   ➔ **Please keep in mind** that the **units** for these procedure codes is **EACH**, meaning for Taxi rides or Transit tickets/tokens, **EACH** is the number of providers who will have an expenditure amount billed for that service, per the frequency (eg: month).

   For example: 1 unit = 1 monthly purchase of services from a vendor, such as a booklet of Taxi ride tickets, or a packet of ride tokens. It is **not** each taxi ride or each token.

7. Per ODDS policy guidelines, the Plan Line should be built using the following guidelines:
   - **Units** = the number of taxi or transit companies that could provide service to the individual in a given month.
• **Frequency** = Select “month” from the dropdown.
• **Plan Line Date Range** = can equal the POC date range.

**Example shown below:**

<table>
<thead>
<tr>
<th>SE</th>
<th>Procedure</th>
<th>Modifier</th>
<th>Units</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>149</td>
<td>OR003 - Comm Transp, Commercial</td>
<td>NA</td>
<td>300 per Month</td>
<td>1/1/2016 - 12/31/2016</td>
</tr>
</tbody>
</table>

This is for 3 diff taxi/transit companies that will be potentially billed each month.

8. With the Plan Line in place, you can now add the “**generic**” provider SPAs under it. Each “**generic**” SPA should be for a different Taxi to Transit company that the client will be utilizing. Be sure to add the name of the company in the notes field provided on each SPA.

• Each separate Taxi or Transit company SPA will get one (1) **UNIT** assigned. This will accommodate one (1) billing per month for each SPA/company for the total amount expended for that company’s service to the client in a month.

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Each provider auth gets to bill once per month for the total amount expended in that month for the service.

• The **RATE** on each SPA would be the maximum total amount projected or anticipated to be possibly billed for a month of service from that company.

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The rate is the maximum total amount anticipated or projected to be potentially billed each month for that company’s services to the client.
9. Submit the “generic” SPA(s) to have them process through system validation edits and move them to **accepted** status.

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**To bill for Taxi services or Transit tickets/tokens in POC:**

1. Users must have the applicable **POC Claims Manager** role to do this SD billing work.

2. Login in to eXPRS. If users have more than one organization login option, they will need to be logged in under the **Local Authority** (for CDDPs shown below) or **Contractor** (for Brokerages) Organization role.

![Login screen]

3. From the left-hand yellow navigational menu click on **Plan of Care → Service Delivered → Create Service Delivered from Single Service Authorization** to find the transportation authorization to be billed against.
4. In the **Create Service Delivered Entries from Single Service Authorization** page, use the criteria fields to search for the transportation authorization to bill against.

   » **Pro Tip**: Search using:
   - Client Prime = the client’s prime number
   - Procedure Code = OR003 or OR554, whichever is used for the individual’s service.
5. **IMPORTANT**: If using multiple, different vendors, be sure to look at the blue SPA# closely so you are selecting the correct SPA for the taxi or transit company you are billing. *All “generic” SPAs will be listed together, and will just show the text information added to the first “generic” SPA created.*

- Click on the $ icon for the SPA listed to create/submit needed billings.

6. In the **Service Delivered by Service Authorization** page, enter the billing information for the month’s services provided by that authorized Taxi or Transit company. The data elements needed for the SD per ODDS Policy are:

- **Date** = the last day of the month being billed
- **Actual Rate** = the total summed amount from the invoice received by the company for all the taxi rides in that month, or a group of transit tickets/tokens purchased. It is not a single taxi ride, single ticket or token.
- **Total Items** = the number of summed/totaled invoices being billed for the company for the month. This should always be one (1) = one summed, monthly total.

Examples shown below.

- **Rides from a taxi company:**

![Service Delivered By Service Authorization](image)

The last day of the month being billed.

The total summed amount being billed by this company for all taxi rides in the month. **Not** an individual ride.

The number of billing events for the month.
7. Submit any *draft* SD billing entries created. The system will then aggregate the billings and generate claims for payment back to the authorizing entity to forward on to the individual taxi/transit company or vendor.

8. If the client is utilizing multiple taxi or transit companies authorized under a procedure code, the system will accommodate single billings against each respective company’s “generic” SPA on the same date, if needed.

9. Once the SDs billed are aggregated into claims, they will be paid back to the authorizing CME, who then forwards the payment to the appropriate transportation vendor.