How to Create & Submit Service Delivered Entries
CDDPs or Brokerages on Behalf of PSW providers
(updated 3/21/18)

Effective system-wide Jan 1, 2015, services to individuals with I/DD not living in residential placements will be authorized in eXPRS via the Plan of Care (POC) structure. This will include services to individuals with I/DD from Personal Support Worker (PSW) providers.

The PSW providers will now need to have the dates/time they worked for the services that are authorized for them, entered into eXPRS to generate claims for payment.

This new POC data element for date/time worked is called a SERVICE DELIVERED (SD) entry. These SERVICE DELIVERED entries are the preliminary data component needed for POC claims processing.

It is highly encouraged for PSW providers to enter their SERVICE DELIVERED data directly into eXPRS themselves. For those PSW providers who are not able to do their own SD billing data entry, this “How To …” guide will provide instructions for CDDP/Brokerage staff who will be doing this work on the PSW provider’s behalf.

Users doing this SD billing entry work on behalf of PSW providers will need the following roles:

- Local Authority POC Claims Manager (for CDDPs)
- Brokerage POC Claims Manager (for Brokerages)
- State POC Claims Manager/Override (state staff)

To create/submit SERVICE DELIVERED entries on behalf of a PSW provider:

1. Login to eXPRS. If users have more than one organization login option, they will need to be logged in under the organization as shown below:
2. From the left-hand, navigation menu, click on **Plan of Care → Service Delivered → Create Service Delivered Entries from Single Service Authorization**.

This will take you to the page to find the “accepted” SPAs for the provider and then submit **SERVICE DELIVERED** entries against on behalf of the provider.
3. Users will now be in the **Create Service Delivered Entries from Single Service Authorization** search page. This page will allow users to search for SPAs in “accepted” status that have been set up for a provider by the CDDP or Brokerage.

At least one piece of search criteria is required to successfully search. The more criteria entered, the more specific or narrow the search results will be.

➔ **PRO TIP**: If creating/submitting SD entries on behalf of a PSW provider, it will likely be easiest to search using a combination of the client’s prime + the provider’s SPD provider ID number.

![Create Service Delivered Entries from Single Service Authorization](image)

The search criteria fields are defined as below:

- **Client Prime** = the prime number for a specific client.

- **Service Location/PSW SPD Provider ID** = the PSW’s SPD Provider ID number.

- **DHS Contract Num** = the biennial contract number for the CDDP or Brokerage who authorized the POC services for the client.

- **Service Element** = the service category for the services authorized. You may select an option from the drop down menu, if you wish. Some providers may only have one option in this menu.

- **Procedure Code** = the specific service procedure code assigned to the authorized service. You may select an option from the drop down menu, if you wish.

- **Svc Modifier Cd** = the applicable service modifier code that works with the procedure code from the previous dropdown. You may select an option from the drop down menu, if you wish. You may have no options in this menu, depending on what you selected in the Procedure Code dropdown.
• **Effective Date** = the first date in the date range being searched that the service authorization’s date range covers.
  - **Exact** = **YES** – means this effective date entered must exactly match the start date of the service authorization.
  - **Exact** = **NO** – means this effective date entered is part of/included in the date range of the service authorization, but the authorization may start on a different date.

• **End Date** = the last date in the date range being searched that the service authorization’s date range covers.
  - **Exact** = **YES** – means this end date entered must exactly match the end date of the service authorization.
  - **Exact** = **NO** – means this end date entered is part of/included in the date range of the service authorization, but the authorization may end on a different date.

With the search criteria entered you wish to search by, click **Find** to return your search results.

4. The list of service authorizations that you searched for will appear below the search criteria field. It is from this list that you can view the services authorized for the client/provider, and create/submit SD entries.

5. To create/submit **SERVICE DELIVERED** billing data on behalf of a PSW provider service to a client, click the $ icon next the applicable SPA.
   
   ➔ **PRO TIP**: right-click on the icon to open in a new tab or window. This will allow you to easily return to your original search results list.

6. Users will be taken to the **Service Delivered by Service Authorization** page to enter SD billing data.

   ➔ **NEW FEATURE**: On the **Service Delivered by Service Authorization** page, the system will now display a warning message if there is no confirmed
Employment Relationship (ER) for the PSW and the individual. This warning message means eXPRS has not received information from the FMAS vendor that all the payroll paperwork for that PSW & employer has been completed to issue payment for this authorization. PSWs can create and save SD billings to draft. When submitted, if there is still no ER, the billing will suspend until that ER has been confirmed from the FMAS vendor.

The message:

“WARNING: There is a problem with Employment Relationship between [CLIENT FIRST LAST] and [PSW Provider]. No payments will be issued to [PSW Provider] for this authorization until the problem is resolved. Please contact PPL at 1-888-419-7705 for more information.”

7. In the Service Delivered by Service Authorization page, the users can add the dates and start/end times that the service was delivered by the PSW provider to the client. Users will likely be entering this data from information the PSW provider submitted on any signed paper timesheet/invoice received. With data for the SD entry created in the applicable fields, click Save All after each entry to add a new row of blank fields for more data entry lines.

The data field will show with RED text if information is entered incorrectly. Corrected information will show as BLACK text.
8. The start/end time fields do not require the colon, spaces or the full “AM” or “PM” when keying in your time data. Users can simply enter the numeric time data and “a” or “p” without spaces, and the system will auto-format that entry to the correct time format needed.

**Examples:**
- “8a” will be auto-formatted to be “8:00 AM”
- “917p” will be auto-formatted to be “9:17 PM”

**Time data entered without the “p” added will be auto-formatted as “AM” hours; “10” will be auto-formatted to be “10:00 AM”**

9. For **Hourly services:**
- The system will now accept **exact time** entries, and will no longer auto-round to the nearest quarter-hour. To support this exact time entry change:
✓ Billings with a 0 – 15 minute overlap with OTHER PROVIDER billings will be allowed to facilitate transition time between providers.

✓ Billings that overlap 16 minutes or more will continue to suspend as suspected duplicate services to the client.

For **Mileage**:

- The system will now accept mileage entries to the one-tenth of a mile (00.0) and will no longer auto-round to the nearest quarter-mile.

For **Direct Support Time** for code OR401:

- The data entered in this field must be formatted to reflect the TOTAL time of Direct Support for that SD billing entry. **Decimal values will no longer be accepted.** Direct Support time data entered must be formatted in one of 2 ways:

  ✓ Using the hh:mm format to reflect the total direct support time in total hours/minutes (ex: “2:30” = 2 hours, 30 minutes of direct support time); **OR**

  ✓ Whole number integers only to reflect total MINUTES of direct support time (ex: “57” = 57 minutes; “103” = 103 minutes). These data entries will be auto-converted to the applicable hh:mm equivalent by the system (ex: “57” will auto format to = 0:57; “103” will auto format to = 1:43).

10. With the **SERVICE DELIVERED** data entered, users can add a check to the left-hand box for the SD entries users wish to submit and click the **Submit** button at the bottom. Or, simply close the page. The entries will be saved as “**draft**” and will be available to submit at a later time.
Actions available:

- **Submit** = will submit the draft entries checked for payment processing.
- **Void** = will void a SD entry that has been moved out of “draft”
- **Delete** = will delete/remove a “draft” SD entry

11. Once the SD entries are submitted, the status will change for the SD entries, showing the results of the action.

⇒ **Please note:** SD entries that are created/submitted by CDDP or Brokerage staff on behalf of providers (if they clear all processing edits) will move to “**accepted**” status. This means entries created/submitted by CDDP or Brokerage staff on behalf of PSW providers will **not** “**pend**” for the CDDP or Brokerage to review, as they have been reviewed against the provider’s signed timesheet information prior to being entered/created on behalf of the provider.

12. Users can now close the window/tab they were working in to return to the search results. From the original results list, select another client/service by clicking the $ icon next to another service authorization line, as needed.

13. Repeat steps #3 – #11 to enter/create new **SERVICE DELIVERED** entries on behalf of other PSW providers for other clients/services.

14. **SERVICE DELIVERED** entries submitted for claims/payment processing for PSW providers will be processed by the system in 2 processing cycles each month for the corresponding pay period:

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>System claims processing Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st – 15th of the month</td>
<td>~ the 23rd/24th of that month</td>
</tr>
<tr>
<td>16th – last day of the month</td>
<td>~ the 8th/10th of the following month</td>
</tr>
</tbody>
</table>

Please refer to the payroll time tables released by ODDS for specific dates as to when SD data and timesheets must be submitted, and when paychecks can be expected to received for each processing cycle.