How to Find/View Plan of Care Service Delivered Entries
(updated 8/12/2016)

For services authorized and paid via eXPRS/Plan of Care, users can now search for and view the individual Service Delivered entries without having to search from the service authorizations. This will hopefully assist users in finding information they need on SD entries created, such as which entries have been paid, which may be pending, or if some SD entries may still need action taken.

To Find/View POC Service Delivered Entries:

1. Login in to eXPRS.

2. From the left-hand, yellow navigational menu, click on Plan of Care → Service Delivered → View Service Delivered Entries. This will take you to the View Service Delivered page.

3. Once in the View Service Delivered page, enter the search criteria needed in the corresponding fields to return a list of Service Delivered entries.

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 return. With the criteria entered in the corresponding fields you wish to search by, click Find to get a list of service delivered entries.
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 or the SPD provider ID number assigned to the agency provider’s service location record that was used in the service authorization.

- **Rendering/Agency eXPRS Provider ID** = the eXPRS Provider ID number assigned to the agency provider’s primary or parent “pay to” record for the service authorized.

- **DHS Contract Num** = the biennial contract number for the CDDP or Brokerage who authorized the POC services for the client.
• **Service Prior Auth #** = the specific eXPRS number assigned to each service authorization. You may not know this number.

• **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 a service authorized. You may select an option from the drop down menu, if you wish.

• **Svc Modifier Cd** = the applicable service modifier code that works with a 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.

• **Show Group Only** = check this box if you wish the results to return only those Service Delivered (SD) billing entries that have been checked “YES” for group.

• **Claim ICN** = the specific number assigned by eXPRS for the claim that the SD entry(ies) was/were aggregated into for payment.

• **Status** = the status of the SD billing entry. You may select from the dropdown menu, if you wish:
  - **Select** = blank, no option selected; returns all statuses
  - **Draft** = the service delivered is created & saved, but not yet submitted
  - **Pending** = service delivered has been submitted, and is waiting review/approval from the CDDP or Brokerage who authorized the service
  - **Suspended** = the service delivered entry was submitted, but failed a validation edit in the submission process
  - **Approved** = service delivered entry has passed all edits and approvals, and is ready to be aggregated into a claim for payment
  - **Rejected** = service line has passed all edits and is active to claim against
  - **Denied** = service line has passed all edits and is active to claim against
  - **Void** = the service authorization was submitted, but voided by the CDDP or Brokerage; it is not active.

• **Show Aggregated (into claim)** = select from the options. Default is set to “both” indicating results will include SD billing entries that are both aggregated (included into claims) and not aggregated (not yet included in claims).
• **Begin Date** = the first date in the range being searched for service delivered entries. Defaults to the first date of the current month, but can be changed, as needed.

• **End Date** = the last date in the range being searched for service delivered entries. Defaults to the last date of the current month, but can be changed, as needed.

• **Suspense Location** = to search by a specific suspense exception reason for suspended SD billing entries.

• **Exception Code** = The number code assigned to the suspense exception reason for suspended SD billing entries.

• **Max Displayed** = the number of items in the results list returned; select from the dropdown menu, if you wish.

4. The search results matching the search criteria entered will return in a list below the search fields. The results list is exportable to another file format, if desired.

The results list columns and associated data are defined below:

- **SPA ID** = the eXPRS assigned number for the service prior authorization the SD entry is billed against. The number is a hyperlink that will take the user to the Service Delivered by Service Authorization page for that service in eXPRS.

- **Auth Status** = the status of the service authorization that the SD entry is billed against.

- **Client Prime** = the prime number for the client the service was authorized for and delivered to; the prime number is a hyperlink that will take users to that client’s View Client eligibility page in eXPRS.
• **Client Name** = the first and last name of the client for whom the service was authorized and delivered.

• **Provider** = the agency provider’s service location or the PSW/IC-PSW who delivered the service.

• **SE** = the service element; the service category for the service authorized and billed.

• **Proc** = the service procedure code for the service authorized and billed.

• **Mod** = the service modifier code, if any, for the service authorized and billed.

• **Service Date** = the date the service was delivered for the entry.

• **Begin Time** = the start or begin time the service was delivered for the entry.

• **End Time** = the end time for the service that was delivered for the entry.

• **Group Setting** = Yes or No, indicating if that SD billing was billed for services provided in a “group” (more than one client during that time).

• **Service Hours/Units** = the total number of units or hours received by the client as billed for the service in the SD entry. This amount is the full service time in the billing and is what draws down on the Monthly Attendant Care or Weekly Employment hours limits. This amount may be different than the Billed Units, if the Group Setting is YES, indicating the billed amount is pro-rated as being part of a group.

• **Billed Units** = the total number of units (hours) actually billed and paid for the SD billing entry. This amount may equal the Service Units if “Group Setting” is NO, meaning the service was received 1:1 (not in a group), or a different, pro-rated amount if the “Group Setting” is YES, indicating the service was provided as part of a group.
- **Total Direct Support Time** = this time number applies to code OR401/W5 or OR401/W6 delivered by Agency Providers only, and indicates the amount of time *(hh:mm)* the client was seen face-to-face by the provider during that billing.

- **Rate** = the rate authorized for the service unit.

- **Amount** = the total amount billed for the service in the SD entry.

- **SD ID** = the unique identification number assigned to that specific SD billing entry by the system for tracking purposes. The number is a hyper-link and when clicked will take the user to view more details for that SD billing entry.

- **SD Status** = the status of the Service Delivered entry.

- **Claim ICN** = the unique identification number assigned to the aggregated claim that the SD entry is included; if there is an ICN listed, that indicates the SD entry has been aggregated into a claim for payment. The ICN number is a hyperlink that will take the user to that specific View Claim page in eXPRS.

5. The **Service Delivered** billing entries results list can also be exported by selecting an export option to the right, just above the list.

6. To view the specific details on an SD billing entry, click on the SD ID. Pages 10 – 11 of the assistance guide *How to Track Service Delivered Entries* explain how to read the SD billing entry when viewing.

7. For any SD entries that searched for using the specific status of “draft” or “suspended”, a check box will show at the far left of the SD entry line. Users may submit these “draft” or “suspended” SD entries in a batch from this page, if they wish. Simply place a check in the box next to the entry(ies) desired, and then click **Submit** at the bottom of the page.
For draft SD entries, you will submit them from this page.

Just check the box next to the SD entry you wish to submit.

Click Submit for entries submitted above.

San francisco found 55 (displaying all rows)