How to Void a POC Service Delivered Entry

CDDPs & Brokerages

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There are situations when a POC Services Delivered (SD) entry must be voided or corrected, even after it has been processed, aggregated into a claim and paid to the provider. In those situations, the SD entry can be voided, and a new SD entry created (if needed) as a correction/replacement.

Agency providers have permissions to do this Services Delivered voiding directly.

PSW providers do not have permissions to do this voiding work; the CDDPs/Brokerages will need to do this SD voiding work on behalf of the PSW/IC-PSW provider.

Some things to consider when voiding Service Delivered entries:

- Service Delivered (SD) entries are not POC Claims. CDDP/Brokerage staff can only void SD entries. They cannot void POC claims.

- SD entries in a status of “pending”, “suspended” or “approved” can be voided.

- Approved SD entries that have not been aggregated into a claim for payment (no claim ICN assigned), voiding is not an issue. This does not trigger any claims action for payment correction.

- Approved SD entries that have already been aggregated into a claim for payment – voiding is possible, but will create a Provider Liability Amount (PLA) to be recovered from the provider’s future payments.

- Users need only void the SD entries that are of issue, even if there are other SD entries that do not need voiding in the same POC Claim.

- When a SD billing entry that has been paid is voided, the entire claim that the SD billing entry is contained within will be automatically voided by the system. The other SD billing entries in that claim that are not voided will stay in approved status and will be moved to a new claim by the system in the next aggregation cycle.
• If the voiding of an SD entry is to be followed by the creation/submission of replacement SD entries (to make a payment correction), it is best practice to do that voiding and new SD entry creation/submission work at the same time, so all are captured in the same claim aggregation cycle for payment adjustment/correction.

**The POC Claims correction process (high level):**
When an *approved* SD entry that has already been aggregated into a claim for payment (has an assigned ICN) is voided, this will trigger a claims correction in the next claims aggregation cycle run by the system for the provider.

The system will automatically:
• Void the POC Claim that the voided SD entry(ies) are housed within, creating a PLA for the paid claim amount.
• Release any other SD entries from that claim that are still in *approved* status,
• Collect those released SD entries and any new replacement SD entries created and aggregate those into a new claim,
• Process that new claim for payment, applying the new claim amount to any PLA amounts owing for the provider per the stipulated recovery amount for the provider type.

Generally ...
  o If the new claim amount is MORE than the voided claim/PLA owing, the provider should be paid the difference.
  o If the new claim is LESS than the voided claim/PLA amount owing, then the balance owed will remain in a PLA to be recovered from future payments to the provider.

CDDP or Brokerage users must have one of the below roles to void Service Delivered entries.
• **Local Authority POC Claims Manager** (CDDP)
• **Brokerage POC Claims Manager** (Brokerages)

**To void a POC Service Delivered entry:**

1. Login to eXPRS. From the left-hand yellow menu click on *Plan of Care ➔ Service Delivered ➔ View Service Delivered Entries.*
2. In the **View Service Delivered** page, search for the Service Delivered entry that you need to void. You can do this by using the search criteria fields to narrow your search to bring back the SD entry that you want.

   - **For example**: to search for an SD entry for a specific client, service, provider and dates, you would enter the criteria as exampled below:
     - **Client Prime** = the prime number for the client
     - **Procedure Code** = select the service from the drop down
     - **SPD Provider ID number** = the SPD Provider ID for the PSW
     - **Status** = select a status from the dropdown; general this will be approved. **NOTE: selecting a status is required to activate the action check boxes for voiding.**
     - **Begin Date** = the first date of the date range that the SD entry may fall within
     - **End Date** = the last date of the date range that the SD entry may fall within.

   Click **FIND** to search.
3. From the results list, check the box in the far left-hand column for the SD billing entry(ies) that need to be voided. Scroll to the bottom and click **VOID**.
4. When the process is completed, users will be taken to a confirmation page, showing the results of the void action.

**Alternative Method to Void SD billing entries**

In some situations, where there is not extensive SD billing entry data for an SPA, voiding may be possible on the Service Delivered by Service Authorization page. If this is not allowed, please use the voiding process outline above.

**To void an SD billing entry from this page:**

1. After logging in to eXPRS, from the left-hand navigation menu, click on Plan of Care → Service Delivered → Create Service Delivered from Single Service Authorization.
2. In the **Create Service Delivered from Single Service Authorization** page, enter the criteria desired to search for the client’s SPA that has SD billing entries that need to be voided. Click FIND to search for SPAs.

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

3. From the search results, click on the green $ icon to the far right for the SPA that has SD billings that need voiding.

![SPA Details](image)

4. Now in the **Service Delivered by Service Authorization** page, find the SD entry(ies) that need to be voided. Users may need to expand the **Archive** section to view more entries. Place a check box in the box(es) next to the SD

![Service Delivered Details](image)
entry(ies) to select them, and then click the **Void** button to take the action to void them.

5. Once the action has completed, users can confirm the new status of the SD entry(ies) is/are now **Void**.
**Please note:** that action was taken on the entry(is), they were moved out of the **Archive** section and up the page to the section for new activity. They will be re-archived after 30 days.


**IMPORTANT:** You do not need to void the associated claims.

The system will void automatically any claim(s) the voided SD billing entries are within in the next claims aggregation cycle. In that process, the system will move any remaining **approved** SD entries, plus add any new/replacement SD entries that are in **approved** status to a new/replacement claim and process that new claim for payment. Any PLA created in the claim voiding process will be applied to the new claim(s) that were created/processed.