

## How to SUBMIT Service Delivered (SD) Billings as a Batch in eXPRS/POC – Agency Providers

(updated 3/26/2020)

eXPRS has the ability to allow users to search for **draft** Service Delivered (SD) billing entries to submit them in a batch process.

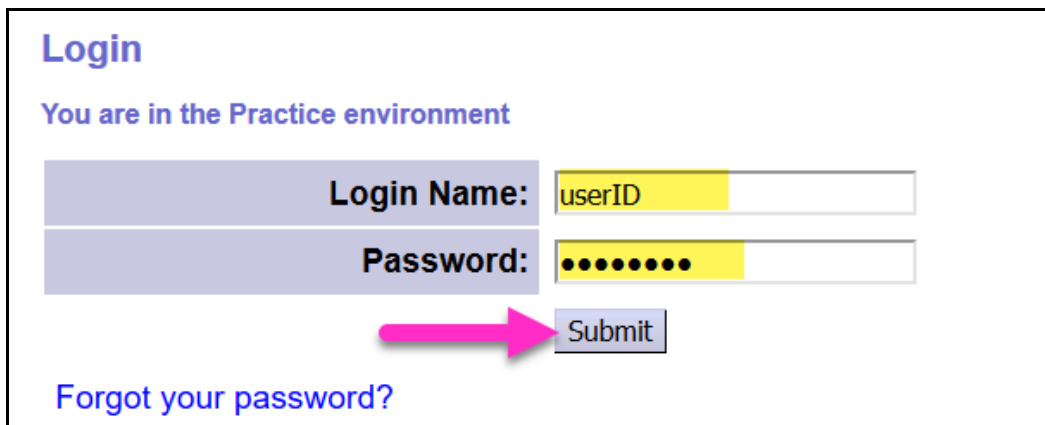
This is most useful to submit **draft** SD billing entries that have been uploaded by the Agency Provider via the **Agency SD Import** process or submit many other SDs for payment at one time.

**IMPORTANT:** If you have EVV SD billings that need corrections or edits, it is best practice to do those corrections/edits **FIRST**, before submitting SDs as a batch. This will prevent you from potentially submitting SDs with incorrect data, which will require more work to make corrections once out of **draft** status.

Information on how to do EVV SD corrections in the eXPRS Desktop can be found in the [Agency EVV - Correct an EVV SD Billing](#) user guide.

### To submit multiple SD billings as a batch:

1. Login to the eXPRS Desktop.




**Login**

You are in the Practice environment

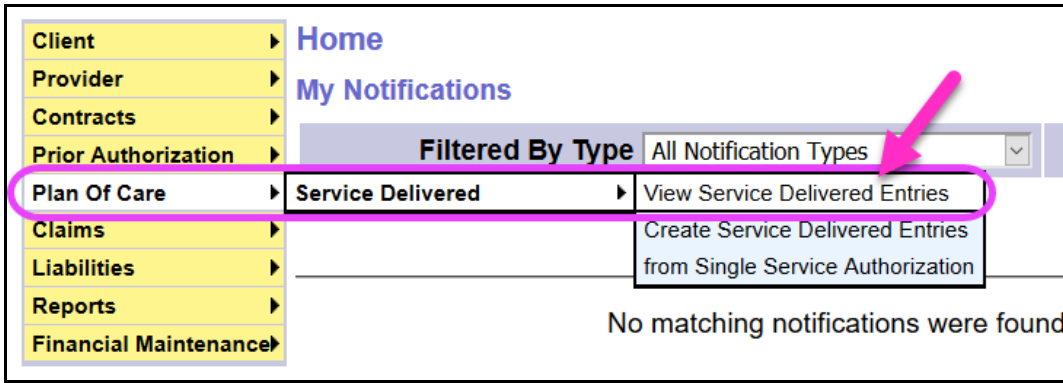
Login Name:

Password:



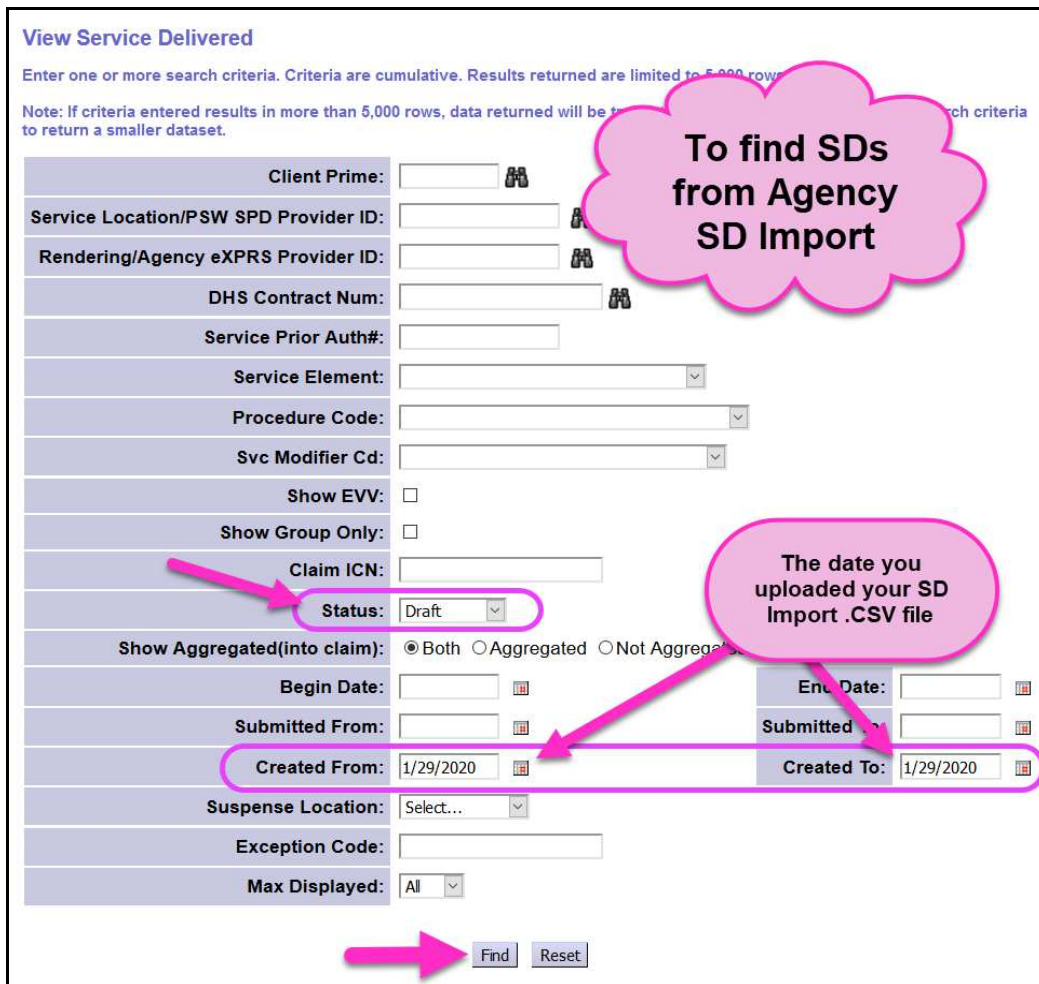
[Forgot your password?](#)

2. From the left-hand, yellow navigational menu, click on **Plan of Care → Service Delivered → View Service Delivered Entries**.



3. In the **View Service Delivered** page, enter search criteria needed to find your **draft** SD billing entries. Depending on the group of **draft** SD billing entries you're wanting to submit, the search criteria you'll want to use may be different.

- To find SD billings that were uploaded via the **Agency SD Import** process, use the search criteria:
  - **STATUS\*** = Draft (*required for batch submission*)
  - **CREATE FROM** = the date you uploaded your **.CSV** SD Import file
  - **CREATE TO** = the date you uploaded your **.CSV** SD Import file
  - Click **FIND** to search



- To find other draft SD billing entries, use the search criteria:
  - **STATUS\*** = Draft (*required for batch submission*)
  - **BEGIN DATE** = the first date the service was provided
  - **END DATE** = the last date the service was provided

Examples of other **OPTIONAL** criteria to use, if you wish:

- **CLIENT PRIME** = if searching for a specific individual’s SD billings, use their Prime Number to filter further.
- **PROCEDURE CODE** = if searching for SD billings for a specific service, select a service option from the dropdown to filter further.

With your criteria entered, click **FIND** to search.

**View Service Delivered**

Enter one or more search criteria. Criteria are cumulative. Results returned are limited to 6,000 rows.  
 Note: If criteria entered results in more than 6,000 rows, data returned will be truncated. You may want to return a smaller dataset.

Client Prime:

Service Location/PSW SPD Provider ID:

Rendering/Agency eXPRS Provider ID:

DHS Contract Num:

Service Prior Auth#:

Service Element:

Procedure Code:

Svc Modifier Cd:

Show EVV:

Show Group Only:

Claim ICN:

Status:

Show Aggregated(into claim):  Both  Aggregated  Not Aggregated

Begin Date:

Submitted From:  Submitted To:

Created From:  Created To:

Suspense Location:

Exception Code:

Max Displayed:

4. From the search results returned, check the box(es) for the SDs to be submitted, and then click **SUBMIT** at the bottom of the page.

Export options:  CSV

SPA ID	Auth Status	SD ID	Client Prime	Client Name	Provider	Direct Support Professional	DHS Contract Num	Contractor Name	SE	Proc	Mod	Service Date	Begin Time	End Time	Group Setting	Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD Status
#####	Accepted	xyz0000a	SZBTUBW LMDODWL	Agency Provider	Mary Smith	#####	CMC Name	49	OR626	NA	01/02/2020	08:45 AM	03:30 PM	No	6:45	6:45	NA	\$27.28	\$184.14	Draft	
#####	Accepted	xyz0000a	SZBTUBW LMDODWL	Agency Provider	Mary Smith	#####	CMC Name	49	OR626	NA	01/03/2020	09:00 AM	03:30 PM	No	6:30	6:30	NA	\$27.28	\$177.32	Draft	
#####	Accepted	abc9999x	IDBJOBM RWUHUHR	Agency Provider	Sam Jones	#####	CMC Name	49	OR526	NA	01/06/2020	09:00 AM	03:30 PM	No	6:30	6:30	NA	\$27.28	\$177.32	Draft	
#####	Accepted	abc9999x	IDBJOBM RWUHUHR	Agency Provider	Sam Jones	#####	CMF Name	49	OR526	NA	01/07/2020	08:45 AM	03:30 PM	No	6:45	6:45	NA	\$27.28	\$184.14	Draft	
#####	Accepted	abc9999x	IDBJOBM RWUHUHR	Agency Provider	Sam Jones	#####	CMC Name	49	OR526	NA	01/09/2020	09:00 AM	03:30 PM	No	6:30	6:30	NA	\$27.28	\$177.32	Draft	
#####	Accepted	kwv0000y	JCAIPAN QXJUVUHQ	Agency Provider	Mary Smith	#####	CMC Name	49	OR626	NA	01/09/2020	08:45 AM	03:30 PM	No	6:45	6:45	NA	\$27.28	\$184.14	Draft	

(displaying all rows)

Submit Delete

5. When the submission process completes, users will be taken to a confirmation page.

### Service Delivered Results

SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/2/2020	08:45 AM	03:30 PM	6:45	\$27.28	\$184.14	Approved	
#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/3/2020	09:00 AM	03:30 PM	6:30	\$27.28	\$177.32	Approved	
#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/6/2020	09:00 AM	03:30 PM	6:30	\$27.28	\$177.32	Approved	
#####	abc9999x	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/7/2020	08:45 AM	03:30 PM	6:45	\$27.28	\$184.14	Approved	
#####	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/8/2020	09:00 AM	03:30 PM	6:30	\$27.28	\$177.32	Approved	
#####	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/9/2020	08:45 AM	03:30 PM	6:45	\$27.28	\$184.14	Approved	
#####	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/10/2020	09:00 AM	03:30 PM	6:30	\$27.28	\$177.32	Approved	

Previous Close

However, waiting for the confirmation page to return is not necessary. You can submit your SDs & then come back later & search for the results by using **Submit To** & **Submit From** dates in the Search Criteria.