

## **DD Agency Provider Service Delivered (SD) Import Process How to Import SD .CSV File**

eXPRS has functionality that will allow for the mass (or batch) upload & import of Service Delivered (SD) billing entry data for DD Agency Providers. There is some preliminary work that Agency Providers will need to do ***before*** using the SD import process.

Agency Providers should know that there may be prep work they will need to do within their own IT systems to generate an acceptable .CSV file. Please read through the below assistance guides & complete any internal IT work needed ***prior to*** using the SD Import process:

- **Agency SD Import – Overview**
- **Agency SD Import - .CSV File Format Information**

Please remember that The SD Import process is **ONLY** available for Agency Plan of Care (POC) authorized ***HOURLY services***, including those services that require additional data for Electronic Visit Verification (EVV) reporting. Mileage, Event, or monthly CPA type services will not upload & must still be entered in eXPRS manually.

A staff person with your agency will need the below user role assigned to do SD Import work in eXPRS:

- **Provider Agency SD Importer**

In addition, to submit your imported, ***draft*** SD billings, someone at your agency (and could be the same person who does the import) will need to be assigned the below user role to do that SD submission work:

- **Provider Agency Claims Manager**

Once your agency has successfully generated a **.CSV** file for your SD upload/import, follow the steps on the next pages to upload that **.CSV** file & import the SD billing entries it contains.

## To Upload a .CSV file & Import SD billing entries:

1. Login to eXPRS.

**Login**

You are in the Practice environment

**Login Name:**

**Password:**

[Forgot your password?](#)

[Need a login?](#)

2. From the left-hand navigational menu, click on **Plan of Care** → **Service Delivered** → **Service Delivered Batch Import**.

Client ▶ Home

Provider ▶ My Notifications

Contracts

Prior Authorization

**Plan Of Care** ▶ **Service Delivered** ▶ View Service Delivered Entries

Claims ▶ Create Service Delivered Entries from Single Service Authorization

Liabilities ▶

Reports ▶

Financial Maintenance ▶

Filtered By Type All Notification Types

No records found

Oregon Department of Human Services Express Payment and Reporting

500 Summer St. NE

3. In the **Service Delivered Batch Import** page, click on the **Browse** button to find the **.CSV** import file you have generated/created and saved on your computer you wish to upload.

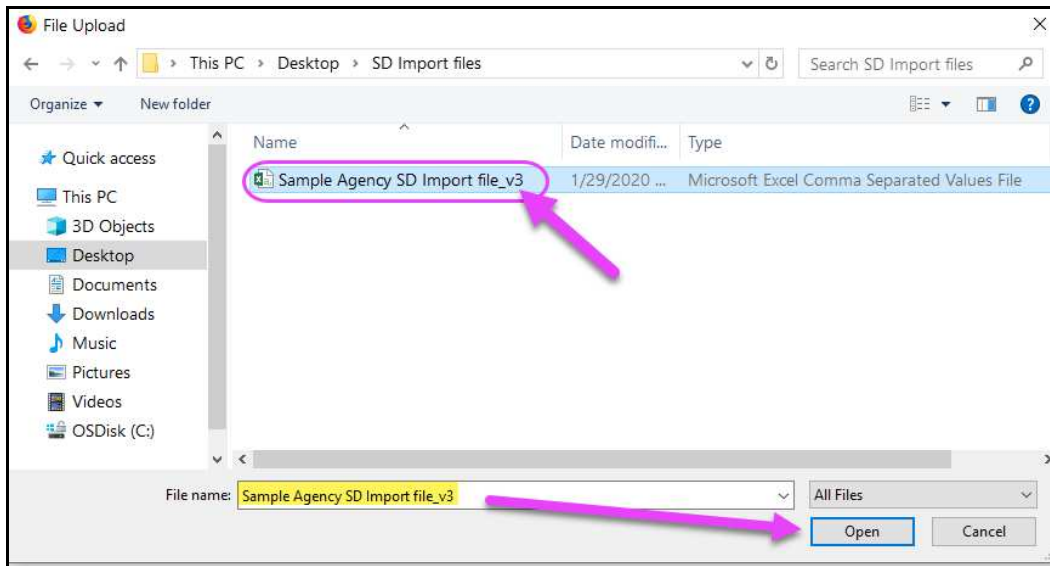
**Service Delivered Batch Import**

Select the CSV file containing the Service Delivered Batch Rows according to the specifications.

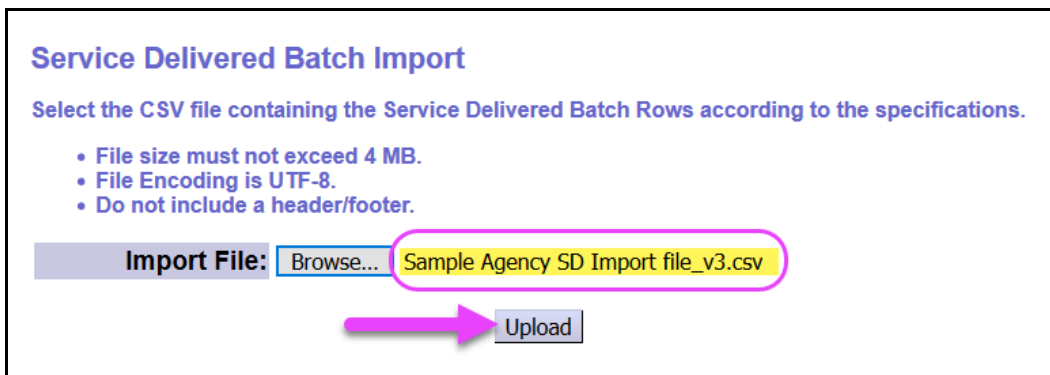
- File size must not exceed 4 MB.
- File Encoding is UTF-8.
- Do not include a header/footer.

**Import File:**  No file selected.

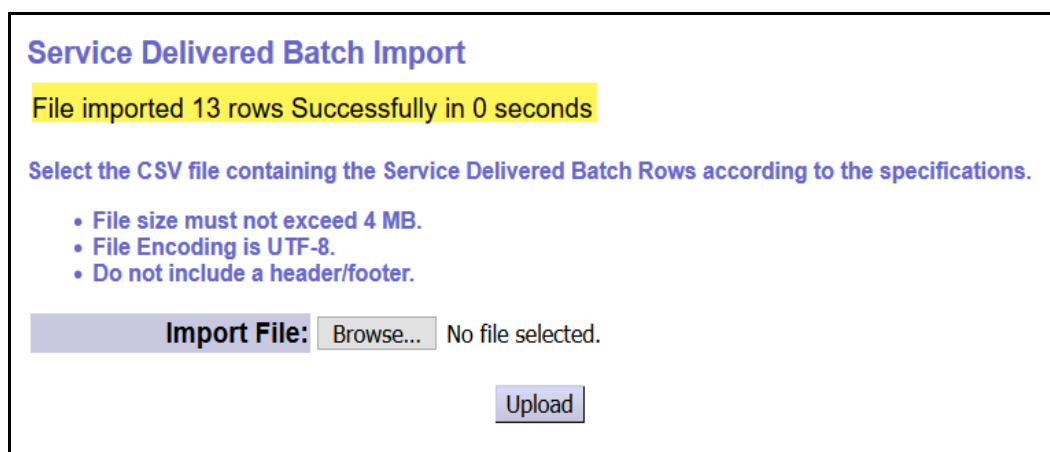
4. When the **Browse** button is clicked, it will open a pop-up file search window to allow you to find the **.CSV** import file saved on your computer. When located, select that file & then click **Open**.



5. You will be returned to the **Service Delivered Batch Import** page, and the file you selected from your computer will show. Click on **Upload** to upload the data from that file into eXPRS.



6. If the **.CSV** import file uploads successfully, you will see a message noting that.

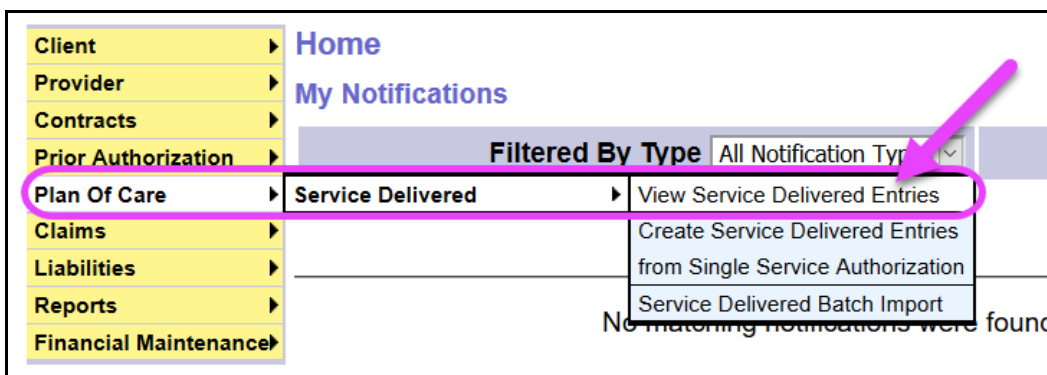


If your **.CSV** file contains a large number of data rows, the upload process may take a while and you may **“time-out”** in eXPRS. If you get a time-out warning, you can click **“I’m still here”** to continue to wait, if you wish.

**\*\***If your **.CSV** import file encounters errors during the upload process, please use the **Agency SD Import – Error Management** user guide for assistance in troubleshooting any errors.

7. Now that your SD billings are imported from your **.CSV** file, they are saved in eXPRS as **draft**. Someone at your agency with the **Provider Agency Claims Manager** role will need to submit those **draft** imported SD billings to process them for payment.

To find your imported **draft** SD billings, from the left-hand navigational menu, click on **Plan of Care → Service Delivered → View Service Delivered Entries**.



8. In the **View Service Delivered** search window, search for your newly imported SD billing entries by using the criteria shown in the image on the next page.
  - **Status = DRAFT** (this will activate the check boxes you will need to use).
  - **Create From = the DATE you uploaded the .CSV import file** (this is the date the **draft** SD billings were created).
  - **Create To = the same date you used on the Create From field** (this is the date the **draft** SD billings were created).

Click **FIND** to search for your imported, **draft** SD billings.

### View Service Delivered

Enter one or more search criteria. Criteria are cumulative. Results returned are limited to 5,000 rows.

Note: If criteria entered results in more than 5,000 rows, data returned will be truncated. You may need to narrow your search criteria 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: **Draft**

Show Aggregated(into claim):  Both  Aggregated  Not Aggregated

Begin Date:  End Date:

Submitted From:  Submitted To:

Created From: **1/29/2020** Created To: **1/29/2020**

Suspense Location:  Select...

Exception Code:

Max Displayed: 25

- When the search results return, check the box(es) at the far left side, and then click on **SUBMIT** at the bottom to submit those selected **draft** SD billings for payment processing.

Status: **Draft**

Show Aggregated(into claim):  Both  Aggregated  Not Aggregated

Begin Date:  End Date:

Submitted From:  Submitted To:

Created From: **1/29/2020** Created To: **1/29/2020**

Suspense Location:  Select...

Exception Code:

Max Displayed: 25

Export options:

SD Bill	Auth Status	SD Bill	Client Prime	Client Name	Provider	Agency Provider CLS	Contract Num	Contract Name	SL	Prv	Mud	Service Date	Begin Time	End Time	Group Scaling	Service Hours/Rate	billed Hours	Total Direct Support Lines	Rate	Amount	SL Status	Claim ICN	Begin Location	End Location	
<input checked="" type="checkbox"/>	Accepted	1000000000	Wisham, Marla	Agency Provider CLS	Marion County	54	OR547 WP	01/06/2020	08:00 AM	10:30 AM	No	9:30	9:30	NA	\$16.38	\$16.38	Draft								
<input checked="" type="checkbox"/>	Accepted	1000000000	Wisham, Marla	Agency Provider CLS	Marion County	54	OR547 WP	01/08/2020	08:00 AM	10:30 AM	No	9:30	9:30	NA	\$16.38	\$16.38	Draft								
<input checked="" type="checkbox"/>	Accepted	1000000000	Blanchard, Holly	Agency Provider CLS	Marion County	54	OR542 W2	01/06/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$27.05	\$67.6	Draft								
<input checked="" type="checkbox"/>	Accepted	1000000000	Thyris, Justin	Agency Provider CLS	Polk County	54	OR547 WP	01/08/2020	08:00 AM	10:30 AM	No	9:30	9:30	NA	\$77.05	\$77.0	Draft								
<input checked="" type="checkbox"/>	Accepted	1000000000	Thyris, Justin	Agency Provider CLS	Polk County	54	OR547 WP	01/08/2020	08:00 AM	10:30 AM	No	9:30	9:30	NA	\$77.05	\$77.0	Draft								
<input checked="" type="checkbox"/>	Accepted	1000000000	Thyris, Justin	Agency Provider CLS	Polk County	54	OR542 W2	01/06/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$21.36	\$53.4	Draft								

**Total Approved:** 0 \$0.00  
**Total Denied:** 0 \$0.00  
**Total Draft:** 13 \$704.49  
**Total Pending:** 0 \$0.00  
**Total Rejected:** 0 \$0.00  
**Total Suspended:** 0 \$0.00  
**Total Void:** 0 \$0.00

Service Delivered found: 13 (displaying all rows)

10. When the SD submission process completes, you will see the **Service Delivered Results** window, if you have waited for the process to finish.

**Service Delivered Results**

SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
3****3	IxxxxxxxxS	Woodsman, Hunter	Agency Provider CLS	SE54/OR542/W2	1/6/2020	08:00 AM	10:30 AM	2.30	\$16.38	\$40.96	Approved	
3****3	IxxxxxxxxS	Woodsman, Hunter	Agency Provider CLS	SE54/OR542/W2	1/8/2020	08:00 AM	10:30 AM	2.30	\$16.38	\$40.96	Approved	
3****5	MxxxxxxxxA	Branches, Holly	Agency Provider CLS	SF54/OR542/W2	1/6/2020	08:00 AM	10:30 AM	2.30	\$27.05	\$67.62	Approved	
3****13	AxxxxxxxxA	Thyme, Justin	Agency Provider CLS	SE54/OR542/W2	1/8/2020	08:00 AM	10:30 AM	2.30	\$27.05	\$67.62	Approved	
3****14	KxxxxxxxxA	Dactyl, Terry	Agency Provider CLS	SE54/OR542/W2	1/6/2020	08:00 AM	10:30 AM	2.30	\$21.38	\$53.46	Approved	
3****14	KxxxxxxxxA	Dactyl, Terry	Agency Provider CLS	SE54/OR542/W2	1/8/2020	08:00 AM	10:30 AM	2.30	\$21.38	\$53.46	Approved	

Previous Close

However, you do not have to wait, if you do not wish. Large numbers of SD billings submitted at one time may take a while to process.

You can always return to the **View Service Delivered** page at a later time and search for your billings again, to see the new status of the SDs you submitted. Just search by the date you submitted the SD billings in the **Submitted From & Submitted To** fields, and then click **FIND**.