

## DD Agency Provider Service Delivered (SD) Import Process OVERVIEW

*(updated 2/5/2020)*

eXPRS has functionality that will allow for the mass (or batch) upload & import of Service Delivered (SD) billing entry data for DD Agency Providers. This Overview document will provide some basic information on that process.

- The SD Import process is available for **DD AGENCY PROVIDERS** only.
- The Agency SD Import process requires a specific user role to be assigned to DD Provider Agency staff - the **Provider Agency SD Importer** role.
  - Agency Providers can request this role for users by submitting the User Enrollment Form found here:  
<https://apps.state.or.us/exprsDocs/EnrollProviderAgencyUser.pdf>
  - While the same staff person does not need both, the SD Importer role is designed to work in conjunction with & support the **Provider Agency Claims Manager** role, which is needed for **draft** SD billing submission.
- The SD Import process is available for Agency Plan of Care (POC) authorized **HOURLY services only**, including those services that require additional data for Electronic Visit Verification (EVV) reporting.
  - Mileage, Event, or monthly CPA type services must still be entered in eXPRS manually.
- SD billing entries that are imported are **imported to a status of draft**.
  - Once imported, Agency Providers must login to eXPRS and submit those imported, **draft** SD billings manually.
  - Mass submission of **draft** SD billing entries is available within eXPRS.
- The SD Import process utilizes the upload of a **.CSV** (comma separated values) **file** containing SD billing data in **a specific data file layout format**.
  - While Agency Providers can create this **.CSV** file to be uploaded from their own internal systems, the **.CSV** file **must adhere to a specific layout & format to be successfully imported into eXPRS**.

- Information on the **.CSV** file layout & format can be found in the ***Service Delivered (SD) Import: File Format*** document.
- ***IMPORTANT:*** Agency Providers ***must test their.CSV file format*** in eXPRS' Training/Practice environment ***first*** to ensure success ***before*** they will be assigned permissions for Agency SD Import in the regular eXPRS website. See #2 below under **Next Steps** for instructions.
- If one or more data rows on the **.CSV** file imported contains an error, the **ENTIRE FILE** will be rejected/fail to import.
  - The Agency will be returned information on the file on which data row(s) had errors & what the error was so they may correct the issue & attempt the import again.

## **NEXT STEPS:**

1. Review the ***.CSV Import File Format Information*** document for the specific **.CSV** file format details that your internal systems will need to produce to upload/import SDs to eXPRS.
2. To get set up for testing your file for the Agency SD Import, please send an email with subject of “**SD Import Process**” to [info.exprs@state.or.us](mailto:info.exprs@state.or.us) .
  - *Agency Providers **must test their.CSV file format** in eXPRS' Training/Practice environment **first** to ensure success **before** they will be assigned permissions for Agency SD Import in the regular eXPRS website.*
3. Complete & submit the User Enrollment Form to request the **Agency Provider SD Importer** role for the staff who will be doing the SD Import work for your organization.
  - The Provider Agency User Enrollment Form is available here: <https://apps.state.or.us/exprsDocs/EnrollProviderAgencyUser.pdf>
4. Review the following user assistance guides on the SD Import process:
  - ***How to Upload/Import SD Billing Entries for Agency Providers*** user assistance guide for instructions on how to successfully upload/import your **.CSV** file.
  - Agency ***SD Import File Error Management*** user guide for information on import error messages, and how to resolve them.