

How to Find and View Service Delivered Billing Entries

Users can search for Service Delivered Billing Entries (SDs) to review the data or to take action on a large list of SDs at one time, if desired.

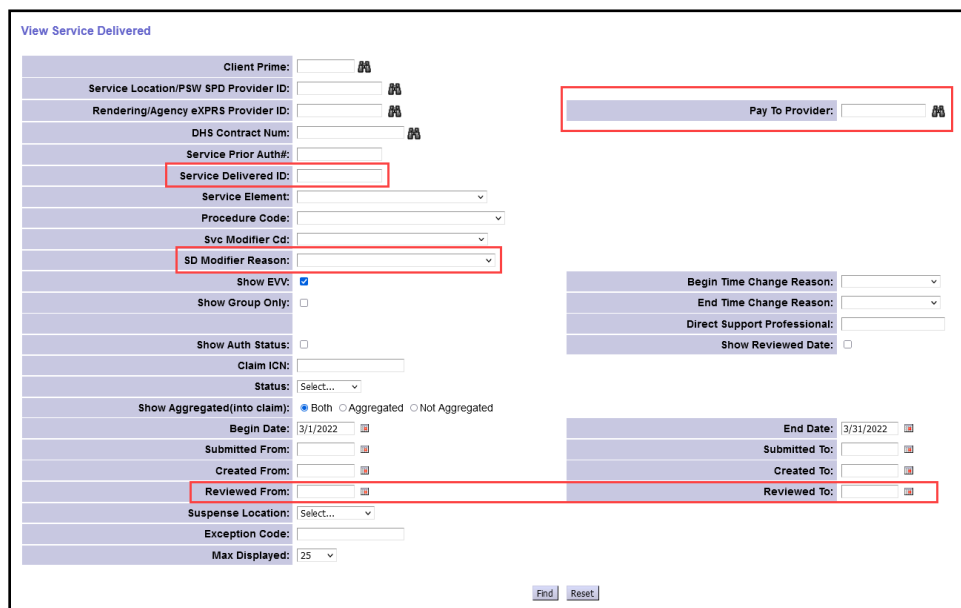
How to Find Service Delivered Billing Entries:

- 1) Log in to eXPRS.
- 2) Select **Plan of Care > Service Delivered > View Service Delivered Entries**.



Plan Of Care	Service Delivered	View Service Delivered Entries
Claims		Create Service Delivered Entries from Single Service Authorization
Liabilities		Create Service Delivered Entries from Multiple Service Authorizations
Reports		Create POC Daily Service Delivered
Financial		Service Delivered Batch Import
Maintenance		

- 3) On the **View Service Delivered** page, enter at least one search criteria and select **Find** to return a list of SDs.



View Service Delivered

Client Prime: [] []

Service Location/PSW SPD Provider ID: [] []

Rendering/Agency eXPRS Provider ID: [] []

DHS Contract Num: [] []

Service Prior Auth#: []

Service Delivered ID: []

Service Element: []

Procedure Code: []

Svc Modifier Cd: []

SD Modifier Reason: []

Show EVV:

Show Group Only:

Show Auth Status:

Claim ICN: []

Status: []

Show Aggregated(into claim): Both Aggregated Not Aggregated

Begin Date: [3/1/2022] []

Submitted From: [] []

Created From: [] []

Reviewed From: [] []

Suspense Location: []

Exception Code: []

Max Displayed: [25]

Pay To Provider: [] []

Begin Time Change Reason: []

End Time Change Reason: []

Direct Support Professional: []

Show Reviewed Date:

End Date: [3/31/2022] []

Submitted To: [] []

Created To: [] []

Reviewed To: [] []

[Find] [Reset]

TIP: The criteria highlighted in red above are new as of 5/1/2022. All search criteria options are defined in **Appendix A**.

4) The results list will display SDs that match the search criteria.

SPA ID	SD ID	Client Prime	Client Name	Provider	Direct Support Professional	DHS Contract Num	Contractor Name	SE	Proc	Mod	SD Mod Reason	Service Begin
43	05 48	14				1 4		149	OR526	NA		02/08/2022 02:05 PM PST
43	05 48	15				1 4		149	OR526	NA		02/09/2022 11:59 AM PST
43	05 48	16				1 4		149	OR526	NA		02/10/2022 08:58 AM PST
43	05 48	17				1 4		149	OR526	NA		02/15/2022 02:03 PM PST

Export options: [CSV](#) | [Excel](#) | [PDF](#) | [RTF](#)

Service End	Group Setting	Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD Status	Claim ICN	Begin Location	End Location
PST 02/08/2022 05:16 PM PST	No	3:11	3:11	NA	\$32.23	\$102.49	Approved	2022	1	
02/09/2022 05:07 PM PST	No	5:08	5:08	NA	\$32.23	\$165.34	Approved	2022	1	
PST 02/10/2022 01:46 PM PST	No	4:48	4:48	NA	\$32.23	\$154.70	Approved	2022	1	
PST 02/15/2022 05:40 PM PST	No	3:37	3:37	NA	\$32.23	\$116.67	Approved	2022	1	

TIP: The data can be exported to another format by selecting an option on the top-right of the list. The Results List columns are defined in **Appendix B**.

Export options: [CSV](#) | [Excel](#) | [PDF](#) | [RTF](#)

Group Setting	Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD Status	Claim ICN	Begin Location	End Location
No	3:11	3:11	NA	\$32.23	\$102.49	Approved	2022	1	
No	5:08	5:08	NA	\$32.23	\$165.34	Approved	2022	1	
No	4:48	4:48	NA	\$32.23	\$154.70	Approved	2022	1	
No	3:37	3:37	NA	\$32.23	\$116.67	Approved	2022	1	

- 5) To take action on multiple SDs, select a **Status** from your search criteria when searching (**e.g. Draft, Pending etc.**). This activates the checkboxes on the results list. Then select the checkboxes at the left of the results list and click an action button at the bottom of the page.

Search criteria fields include: Claim ICN, Status (dropdown), Show Aggregated (radio buttons), Begin Date, Submitted From, Created From, Created By, Suspense Location, Exception Code, and Max Displayed. Action buttons 'Find' and 'Reset' are present.

Auth	Status	SD ID	Client Prime	Out of Cycle	Client Name	Provider	Direct Support Professional	DHS Contract Num	Contractor Name	SE	Proc	Mod	Service Begin	Service End	Group Setting	Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD Status
<input type="checkbox"/>	Accepted	43-13	14	No	FISHER, BOBBIAN	ADHD Provider	15-14-4	CME Name	140	OR026	WA	10/28/2020 09:04:37 AM PDT	10/28/2020 11:06:04 AM PDT	No	2:01	2:01	NA	\$29.79	\$60.18	Approved	
<input type="checkbox"/>	Accepted	43-13	14	No	FISHER, BOBBIAN	ADHD Provider	15-14-4	CME Name	140	OR026	WA	10/28/2020 09:04:37 AM PDT	10/28/2020 11:06:04 AM PDT	No	1:01	1:01	NA	\$29.79	\$30.39	Approved	

Buttons: Submit, Void

How to View the Details of an SD and any Attached Claim

- 1) To view the specific details on an SD billing entry, click on the **SD ID Hyperlink**.

SPA ID	SD ID	Client Prime	Client Name	Provider	Direct Support Professional	DHS Contract Num	Contractor Name
43	04814					14	
43	04815					14	
43	04816					14	
43	04817					14	

- 2) On the **Service Delivered Detail View**, review the SD's details.

Service Delivered Detail View

ID: 48 14	Status: Approved
SPA ID: 43 05	Modifier: NA
Service Element: 149	
Procedure Code: OR526	
Service Begin: 02/08/2022 02:05 PM PST	Service End: 02/08/2022 05:16 PM PST
Units: 3:11	Billed Units: 3:11
Rate: \$32.23	Amount: \$102.49
Review Date:	Reject Reason:
Created Date: 2/16/2022	Created By:
Updated Date: 2/17/2022	Updated By:
Original Submit Date: 2/16/2022	Submitted By:
Group Setting: No	Out of Cycle: No
Begin Location:	End Location:
Begin Time Change Reason:	End Time Change Reason:
Direct Support Professional:	

Location Maps

Exceptions: There have been no exceptions for this service delivery record.

TIP: The guide [How to Track Service Delivered Entries](#) explains how to read the information on this page.





- 3) Approved SDs that have been aggregated into a claim have a **Claim ICN Hyperlink**. Click the hyperlink to view the claim.

Export options: [CSV](#) | [Excel](#) | [PDF](#) | [RTF](#)


Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD Status	Claim ICN	Begin Location	End Location
3:11	3:11	NA	\$32.23	\$102.49	Approved	2022		
5:08	5:08	NA	\$32.23	\$165.34	Approved	2022		
4:48	4:48	NA	\$32.23	\$154.70	Approved	2022		
3:37	3:37	NA	\$32.23	\$116.67	Approved	2022		



APPENDIX A: View Service Delivered page Search Criteria Definitions

View Service Delivered	
A. Client Prime:	<input type="text"/> 
Service Location/PSW SPD Provider ID:	<input type="text"/>  B.
Rendering/Agency eXPRS Provider ID:	<input type="text"/>  C.
D. DHS Contract Num:	<input type="text"/> 
E. Service Prior Auth#:	<input type="text"/>
F. Service Delivered ID:	<input type="text"/>
G. Service Element:	<input type="text" value="v"/>
H. Procedure Code:	<input type="text" value="v"/>

- A. Client Prime** = The prime number assigned to an individual receiving services.
- B. Service Location/PSW SPD Provider ID** = The SPD Provider ID # of either the Agency provider's service location record or the PSW on the authorization.
- C. Rendering/Agency eXPRS Provider ID** = the eXPRS Provider ID # assigned to the Agency provider's primary (or parent "pay to" record) for the service authorized.
- D. DHS Contract Num** = The Contract Number for the Case Management Entity (CME) who authorized the services for the individual.
- E. Service Prior Auth#** = The eXPRS Service Prior Authorization (SPA) ID #. You may not know this number.
- F. Service Delivered ID** = The eXPRS Service Delivered Billing Entry ID #. You may not know this number.
- G. Service Element** = The service category (or benefit group) for the services authorized for the individual. Some providers may only have one option in this menu.
- H. Procedure Code** = The procedure code assigned to the authorized service.

I. Pay To Provider:	<input type="text"/> 
----------------------------	--

- I. Pay To Provider** = the eXPRS Provider ID number assigned to the "pay to" provider record listed on the SPA for the service authorized.

- J. Svc Modifier Cd** = The modifier code that further defines the procedure code from the previous drop-down. There may be no options in this menu depending on the **Procedure Code** selected.
- K. SD Modifier Reason** = Daily Residential SD Billing Modifier Reasons. Some options include the absence reason for a reported Daily Residential SD.
- L. Show EVV** = A check box that activates additional search criteria options specific to EVV services.
 - a. Begin Time Change Reason** = A dropdown list of the reasons that may be selected when an EVV SD is **manually entered** or the **Start** time was changed prior to submission.
 - b. End Time Change Reason** = A dropdown list of change reasons that may be selected on an EVV SD if the **End** time was changed prior to submission.
 - c. Direct Support Professional** = Enter the name of the Agency Direct Support Professional (DSP) listed on the EVV SD to search for billings from that specific DSP. First, Last or both names will work when searching.
 - d. Show Reviewed Date** = Activates the results list column to show the date the SD billing was reviewed by the authorizing CME.
- M. Show Group Only** = Limits results to only those that have been checked **YES** for group. This box applies to services provided by PSW providers only.
- N. Show Auth Status** = Activates the results column to show the status of the SPA the billing was processed against.
- O. Claim ICN** = The eXPRS Claim # for the claim that the SD entry(ies) was/were aggregated into for payment.

- P. Status** = The status of the SD billing entry. Selecting a specific status will trigger selectable check boxes on the left of the result list. Action buttons will also enable, allowing users to take action on multiple SD billings at once (e.g. Submit, Void). The SD billing status options are:

- **Select** = No option selected; returns all statuses.
- **Draft** = The SD has been created & saved, but not submitted.
- **Pending** = The SD has been submitted by the provider and is awaiting review/approval from the CME.
- **Suspended** = The SD was submitted, but failed a validation in the submission process. The issue must be resolved before the SD can move forward.
- **Approved** = The SD has passed all edits and approvals and is ready to be aggregated into a claim for payment.
- **Rejected¹** = The SD was in **Pending** status but was rejected by the CME when reviewed.
- **Denied¹** = The SD was submitted but failed a validation in the submission process and cannot be paid.
- **Void¹** = The SD was submitted but later voided by the provider, CME or other user with void permissions.
- **Reported²** = an SD billing submitted for a Daily Residential service that reports the individual was absent from service on that date.

Q. Show Aggregated(into claim):	<input checked="" type="radio"/> Both <input type="radio"/> Aggregated <input type="radio"/> Not Aggregated	
R. Begin Date:	<input type="text" value="3/1/2022"/>	S. End Date: <input type="text" value="3/31/2022"/>
T. Submitted From:	<input type="text"/>	U. Submitted To: <input type="text"/>
V. Created From:	<input type="text"/>	W. Created To: <input type="text"/>
X. Reviewed From:	<input type="text"/>	Y. Reviewed To: <input type="text"/>
Z. Suspense Location:	<input type="text" value="Select..."/>	
AA. Exception Code:	<input type="text"/>	
BB. Max Displayed:	<input type="text" value="25"/>	

- Q. Show Aggregated (into claim) = select from the options.**
- **Both** = Default setting. The results will include SDs that are & are not aggregated into claims.
 - **Aggregated** = When selected, the results will include only SDs that have been aggregated into claims.
 - **Not Aggregated** = When selected, the results will include only SDs that are not yet aggregated into claims.
- R. Begin Date** = The first **service date** in the date range being searched for SDs. Defaults to the first day of the current month.
- S. End Date** = The last **service date** in the date range being searched for SDs. Defaults to the last day of the current month.
- T. Submitted From** = The first date in the date range being searched for when SDs were **submitted**.

¹ Rejected, Denied and Voided SDs are no longer active in the system; they cannot be edited, copied or resubmitted.

² Reported SD billings are informational only & generate no payment to the provider.

- U. Submitted To** = The last date in the date range being searched for when SDs were **submitted**.
- V. Created From** = The first date in the date range being searched for when SDs were first **created & saved** as a draft.
- W. Created To** = The last date in the date range being searched for when SDs were first **created & saved** as a draft.
- X. Reviewed From** = The first date in the date range being searched for when SDs were reviewed by the authorizing CME.
- Y. Reviewed To** = The last date in the date range being searched for when SDs were reviewed by the authorizing CME.
- Z. Suspense Location** = A dropdown list of specific Suspense Exception Reasons for suspended SDs.
- AA. Exception Code** = The numeric code assigned to the Suspense Exception Reason for suspended SDs.
- BB. Max Displayed** = The number of SDs that will return per page in the results list.
 - **NOTE:** The system limit for SD billing entry results 5,000 rows of data. Searches that result in more than 5,000 rows will not display all results. If that occurs, narrow the search criteria to return a smaller dataset.

APPENDIX B: View Service Delivered Search Results Column Definitions:

1	2	3	4	5	6	7	8
SPA ID	SD ID	Client Prime	Client Name	Provider	Direct Support Professional	DHS Contract Num	Contractor Name
43	05 48	14				1 4	
43	05 48	15				1 4	

- SPA ID** = The eXPRS Service Prior Authorization (SPA) ID # that the SD entry is billed against. The number is a hyperlink that takes the user to the **Service Delivered by Service Authorization** billing page for that service in eXPRS.
- SD ID** = The eXPRS SD ID #. The number is a hyperlink that will take the user to view the **Service Delivered Detail View** page.
- Client Prime** = The prime number for the individual the service was authorized for and delivered to. The number is a hyperlink that will take the user to the individual's **View Client** page.
- Client Name** = The first and last name of the individual for whom the service was authorized and delivered.
- Provider** = The name of the Agency provider's service location record or the PSW provider who delivered the service billed.
- Direct Support Professional** = The name of the Agency DSP staff who provided the EVV service on behalf of the Agency Provider that billed for the service provided.
- DHS Contract Num** = The Contract Number for the Case Management Entity (CME) who authorized the services for the individual.
- Contractor Name** = The name of the Case Management Entity (CME) who authorized the services being billed for the individual.

9	10	11	12	13	14	15	16	17
SE	Proc	Mod	SD Mod Reason	Service Begin	Service End	Group Setting	Service Hours/Units	Billed Units
149	OR526	NA		02/08/2022 02:05 PM PST	02/08/2022 05:16 PM PST	No	3:11	3:11
149	OR526	NA		02/09/2022 11:59 AM PST	02/09/2022 05:07 PM PST	No	5:08	5:08

- SE** = The Service Element (service category or benefit group) for the services authorized for the individual.
- Proc** = The Procedure Code for the service authorized and billed.
- Mod** = The **Modifier Code** (if any), for the service authorized and billed.

12. **SD Mod Reason** = The Daily Residential SD Billing Modifier Reasons. Some options include the absence reason for a reported Daily Residential SD.
13. **Service Begin** = The service begin date & time that the service was provided.
14. **Service End** = The service end date & time that the service was provided.
15. **Group Setting** = Yes or No. Indicates whether the SD billing was billed for services provided to more than one client during that time. **Applies to DD PSW providers only.**
16. **Service Hours/Units** = The total number of units of the service that is being billed for the individual. The number in this column will vary, depending on the service unit type for the service billed.

For example:

- **Attendant Care, DSA, most Employment** = The unit type is **HOURLY**
- **Relief Care (OR507)** = The unit type is **DAY**
- **Mileage transportation** = The unit type is **MILE**

The amount in this column is the full amount of service received by the individual as calculated by the Start & End times or number of units on the SD billing entry. This amount also reconciles to the Monthly Attendant Care or Weekly Employment hours limits for applicable services. This amount may be different than the **Billed Units** if the Group Setting is **YES** (described below).

17. **Billed Units** = The number of units of the service **billed and paid** for the SD billing entry. This amount may be the same as the Service Units. It may also be a different, pro-rated amount if the “Group Setting” is **YES**, indicating the service was provided as part of a group service delivered by a PSW provider.

18 Total Direct Support Time	19 Rate	20 Amount	21 SD Status	22 Claim ICN	23 Begin Location	24 End Location
NA	\$32.23	\$102.49	Approved	2022	1	
NA	\$32.23	\$165.34	Approved	2022	1	

18. **Total Direct Support Time** = This column applies to services delivered by Agency Providers under **Job Coaching-OR401/W4, W5 or W6**. If there is a value, it is the amount of time (**hh:mm**) the individual was seen face-to-face by provider during that Job Coaching service.
19. **Rate** = The rate authorized for the unit billed.
20. **Amount** = The total dollar amount billed for the service in the SD.

21. **SD Status** = The status of the SD.
22. **Claim ICN** = The unique ID assigned to the aggregated claim that the SD is included in. If blank, the SD has not been included in a claim. If a number exists, the SD has been aggregated into a claim for payment. The number is a hyperlink that will take the user to the **View Claim** page for that claim.
23. **Begin Location** = the GPS geo-location, latitude/longitude coordinates for when the EVV service billed **Began** (at the EVV SD Start Time).
24. **End Location** = the GPS geo-location, latitude/longitude coordinates for when the EVV service billed **Ended** (at the EVV SD End Time).