

## How to Create & Submit **Service Delivered** Entries for **SINGLE CLIENT/SERVICE – MULTIPLE DATES**

(Agency Providers - *updated 12/1/15*)

eXPRS Plan of Care (POC) is system structure for the service authorization and billing of services to individuals with I/DD living who in their own or family homes (non-residential care settings). This includes services provided by Agency Providers. With the implementation of POC, a new system structure and term was introduced – **SERVICE DELIVERED (SD)** entries. These **SERVICE DELIVERED** entries are the preliminary billing data component needed for POC claims processing. The SD billing data entries are added to the system by the Agency Providers to document the date and the start/end times a POC service was delivered to an individual. That SD billing data when submitted is processed and aggregated into claims for payment back to the provider.

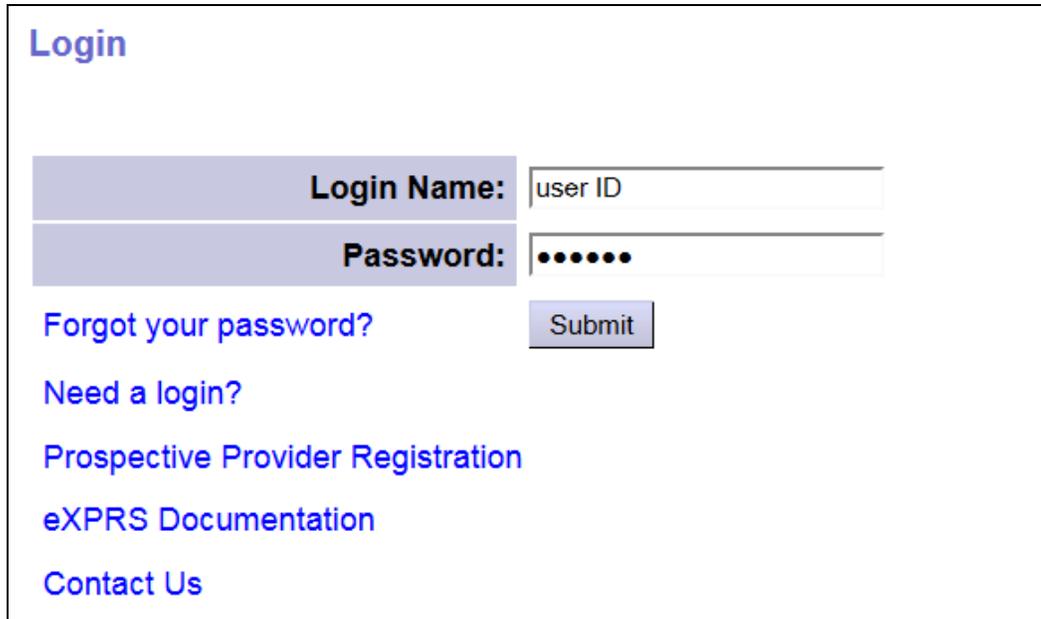
eXPRS Plan of Care has enabled two different methods for Agency Providers to enter their **SERVICE DELIVERED** data. This “*How To ...*” guide will cover method for **SINGLE CLIENT/SERVICE** and **MULTIPLE DATES** entry method. The other method will be covered in its own “*How To...*” guide.

Agency provider users must have one of the following permissions to do this work:

- **Provider Agency Claims Preparer** – can create/save draft **SERVICE DELIVERED** entries.
- **Provider Agency Claims Manager** – can create/edit/submit all **SERVICE DELIVERED** entries.

To create/submit **Service Delivered** entries for a **SINGLE CLIENT/SERVICE** with **MULTIPLE DATES** follow the instructions on the next pages.

1. Login to eXPRS.



2. From the left-hand, yellow navigation menu, click on **Plan of Care** → **Service Delivered** → **Create Service Delivered Entries from Single Service Authorization**.



3. You will now be on the **Find Service Authorizations for Service Delivered** search page. This is the page that PSW providers use, but **will also allow Agency Providers** to search for client service authorizations for a specific date range. It is from these service authorizations that you will select to submit **SERVICE DELIVERED** entries against.

At least one piece of search criteria is required to successfully search, and will only return client Service Prior Authorizations (SPAs) in “**accepted**” status (active for billing).

The more criteria you enter the more specific or narrow your search results will be.



**Create Service Delivered Entries from Single Service Authorization**

Client Prime:  

Service Location/PSW SPD Provider ID:  

DHS Contract Num:

Service Element:

Procedure Code:

Svc Modifier Cd:

Effective Date: 12/1/2015 

End Date: 12/31/2015 

Exact:  Yes  No

Exact:  Yes  No

Click Find to get search results.

Enter any additional criteria you wish to use to search by in these fields.

The search criteria fields are defined as below:

- **Client Prime** = the prime number for a specific client.
- **Service Location/PSW SPD Provider ID** = the SPD provider ID number assigned to the agency provider’s service location record that was used in the service authorization, or the PSW/IC-PSW’s SPD Provider ID number, if the provider is of that type.
- **DHS Contract Num** = the biennial contact number for the CDDP or Brokerage who authorized the POC services for the client.
- **Service Element** = the service category for the services authorized. You may select an option from the drop down menu, if you wish. Some providers may only have one option in this menu.
- **Procedure Code** = the specific service procedure code assigned to a service authorized. You may select an option from the drop down menu, if you wish.
- **Svc Modifier Cd** = the applicable service modifier code that works with a procedure code from the previous dropdown. You may select an option from the drop down menu, if you wish. You may have no options in this menu, depending on what you selected in the Procedure Code dropdown.
- **Effective Date** = the first date in the range being searched that the service authorization’s date range covers.
  - **Exact = YES** – means this effective date entered must exactly match the start date of the service authorization.

- **Exact = NO** – means this effective date entered is part of/included in the date range of the service authorization, but the authorization may start on a different date.
- **End Date** = the last date in the range being searched that the service authorization’s date range covers.
  - **Exact = YES** – means this end date entered must exactly match the end date of the service authorization.
  - **Exact = NO** – means this end date entered is part of/included in the date range of the service authorization, but the authorization may end on a different date.

Click **Find** to return your search results.

5. The results will return any SPAs for your clients that meet the search criteria and are in **“accepted”** status. The list layout is designed for ease of use.

- The results will show the clients you have **“accepted”** authorizations for in alphabetical order, regardless of authorizing CM entity.
- The results list columns are sort-able, so users can change the results list sort order, as needed. Just click on the **RED** column header to change the sort order.
- There is a data field **Direct Support Time** for procedure codes **OR401-W5** and **OR401-W6**. You will need to enter the data for Direct Support Time provided during the corresponding SD billing entries for these services procedure codes, per ODDS Policy guidance.

Sort each column by clicking the header

Last, First client #1 - xyz0000a		Provider - service location						
SPA#	Proc Code	Modifier	Units	Unit	Frequency	Rate	Begin	End
3****b	OR542 - Day Support Activity, non-work	W1 - Facility	25.00	Hours	Week	\$20.75	7/1/2015	6/30/2016
3****1	OR542 - Day Support Activity, non-work	W2 - Community	25.00	Hours	Week	\$23.82	7/1/2015	6/30/2016
Last, First client #2 - mn555a5a		Provider - service location						
SPA#	Proc Code	Modifier	Units	Unit	Frequency	Rate	Begin	End
4****6	OR542 - Day Support Activity, non-work	W1 - Facility	15.00	Hours	Week	\$20.75	7/1/2015	6/18/2016
4****6	OR542 - Day Support Activity, non-work	W2 - Community	15.00	Hours	Week	\$23.82	7/1/2015	6/18/2016
Last, First client #3 - trs9999x		Provider - service location						
SPA#	Proc Code	Modifier	Units	Unit	Frequency	Rate	Begin	End
3****8	OR401 - Ind Sup Emplmt	W6 - Ongoing	25.00	Hours	Week	\$56.25	7/1/2015	1/31/2016

6. From the results list, click on the **\$** icon to the far right of the service you wish to enter **SERVICE DELIVERED** entries.

→ **PRO TIP:** right-click on the icon to open the new page in a new tab or window. This will allow you to easily return to your original search results list.

Name		Service Location/PSW							
Last, First client #1 - xyz0000a		Provider - service location							
SPA#	Proc Code	Modifier	Units	Unit	Frequency	Rate	Begin	End	
3*****5	OR542 - Day Support Activity, non-work	W1 - Facility	25.00	Hours	Week	\$20.75	7/1/2015	6/30/2016	
3*****1	OR542 - Day Support Activity, non-work	W2 - Community	25.00	Hours	Week	\$23.82	7/1/2015	6/30/2016	

Right-click on the \$ icon to open in a new tab/window to add SD entries for the client's service.

7. In the **Service Delivered by Service Authorization** page, you can now add the dates and start/end times for when this service was delivered to the client. Click **Save All** after each entry to add a new row of blank fields for more data entry lines.

The data field will show with **RED text** if information is entered incorrectly. Corrected information will show as **BLACK text**.

<b>Provider:</b>	Provider service location	<b>Dates:</b>	7/1/2015 - 6/30/2016
<b>Client Name:</b>	First Last client #1	<b>Client Prime:</b>	xyz0000a
<b>CM Organization:</b>	Case Management Provider		
<b>Service:</b>	SE54/OR542 - Day Support Activity, non-work/W1 - Facility		
<b>Rate:</b>	\$20.75	<b>Review Req:</b>	No
<b>Units:</b>	25.00 Hours per Week		

Select	Date	Start Time (HH:MM AM/PM)	End Time (HH:MM AM/PM)	Total Service Time	Status
<input type="checkbox"/>	11/1/2015	9:00 AM	12:34 PM	3:34	Draft
<input type="checkbox"/>	11/3/2015	9:13 AM	12:48 PM	3:35	Draft
<input type="checkbox"/>					Draft

7:09

Click **Save All** to save the information & add a new blank row.

Add the date & start/end times for when the service was provided in the corresponding fields.

8. The start/end time fields do not require the colon, spaces or the full “AM” or “PM” when keying in your time data. Users can simply enter the numeric time data and “a” or “p” without spaces, and the system will auto-format that entry to the correct time format needed.

Select	Date	Start Time Hour:Min AM/PM	End Time Hour:Min AM/PM	Service Billed Hours	Units	Group	Status
<input type="checkbox"/>	2/1/2015	08:00 AM	09:00 AM	1.00	No		Pending
<input type="checkbox"/>	2/2/2015	08:00 AM	10:00 AM	2.00	Yes		Pending
<input type="checkbox"/>	2/5/2015	8a				<input type="checkbox"/>	
				3.00			

If you enter this, the system will auto-format that to be 8:00 AM, as shown above.

**Examples:**

- “8a” will be auto-formatted to be “8:00 AM”
- “917p” will be auto-formatted to be “9:17 PM”

**\*\*** Time data entered without the “p” added will be auto-formatted as “AM” hours.

- “10” will be auto-formatted to be “10:00 AM”

9. **NEW DATA FORMAT FEATURES as of the Dec 2015 system update:**

For **Mileage**:

- The system will now accept **exact time** entries, and will no longer auto-round to the nearest quarter-hour. To support this exact time entry change:
  - ✓ Billings with a **0 – 15 minute overlap with OTHER PROVIDER** billings **will be allowed** to facilitate transition time between providers.
  - ✓ Billings that **overlap 16 minutes or more will continue to suspend as suspected duplicate** services to the client.

For **Mileage**:

- The system will now accept mileage entries to the one-tenth of a mile (00.0) and will no longer auto-round to the nearest quarter-mile.

For **Direct Support Time** for code **OR401**:

- The data entered in this field must be formatted to reflect the **TOTAL time of Direct Support** for that SD billing entry. **Decimal values will no longer be accepted.** Direct Support time data entered must be formatted in one of 2 ways:

- ✓ Using the **hh:mm** format to reflect the total direct support time in total hours/minutes (ex: “**2:30**” = 2 hours, 30 minutes of direct support time); **OR**
- ✓ Whole **number integers only** to reflect total **MINUTES** of direct support time (ex: “**57**” = 57 minutes; “**103**” = 103 minutes). These data entries will be auto-converted to the applicable **hh:mm** equivalent by the system (ex: “**57**” will auto format to = 0:57; “**103**” will auto format to = 1:43).

10. With the **SERVICE DELIVERED** data entered, users can add a check to the left-hand box for the SD entries they wish to submit (or take other action). Or, users can simply close the page. The entries will be saved as “**draft**” and will be available to submit at a later time.

Service: SE54/OR542 - Day Support Activity, non-work/W1 - Facility  
 Rate: \$20.75      Review Req: No  
 Units: 25.00 Hours per Week      Print

Select	Date	Start Time (HH:MM AM/PM)	End Time (HH:MM AM/PM)	Total Service Time	Status
<input checked="" type="checkbox"/>	11/1/2015	9:00 AM	12:34 PM	3:34	Draft
<input checked="" type="checkbox"/>	11/3/2015	9:13 AM	12:48 PM	3:35	Draft
<input type="checkbox"/>					Draft

7:09      Save All      Cancel Changes

For items checked above      Void      Submit      Delete

Actions available:

- **Submit** = will submit the draft entries checked for payment processing.
- **Void** = will void the submitted entries checked.
- **Delete** = will delete (remove completely from the system) the draft entries checked.

11. Once the action is taken, the status will change for the SD lines, showing the results of the action.

12. Users can now close the window/tab they were working in to enter the SD entries, to return to the search results, and select another client/service by clicking the \$ icon next to another service authorization line.
13. Repeat steps #4 – 10, to create new **SERVICE DELIVERED** entries for other clients/services.
14. **SERVICE DELIVERED** entries submitted for claims/payment processing will be aggregated into claims at 3:30 am every business day. Those claims created will be processed for payment at approximately 5:00pm every business day. Entries submitted after the claims aggregation and payment processes have run will be included in the next business day's cycle.