

How to Create & Submit **Service Delivered** Entries for **SINGLE DATE – MULTIPLE CLIENT/SERVICES**

(Agency Providers - *updated 11/30/15*)

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.

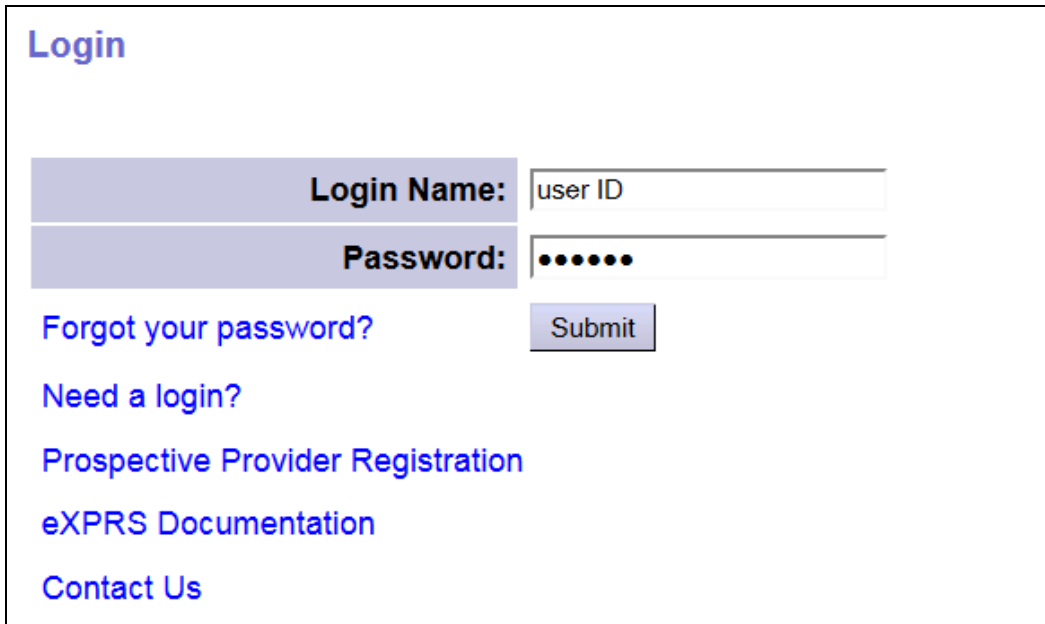
eXPRS Plan of Care has enabled several different methods for Agency Providers to enter their SD billing data. This **“How To ...”** guide will cover method for **SINGLE DATE** and **MULTIPLE CLIENTS/SERVICES** manual entry method. The other methods will be covered in their own **“How To...”** guides.

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 DATE** and **MULTIPLE CLIENTS/SERVICES**, follow the instructions on the next pages.

1. Login to eXPRS.



Login

Login Name: user ID

Password: ••••••

[Forgot your password?](#)

[Need a login?](#)

[Prospective Provider Registration](#)

[eXPRS Documentation](#)

[Contact Us](#)

2. From the left-hand, yellow navigation menu, click on **Claims** → **Create POC Daily Service Delivered**.



Client ▶ Home

Provider ▶ My Notifications

Contracts ▶

Prior Authorization ▶

Plan Of Care ▶

Claims ▶ View Claims

Liabilities ▶ Create Claims

Reports ▶ Update Claims

Financial ▶ Submit Claims

Maintenance ▶ Create Absence Claims

Create Daily SE64 Claims

Create POC Daily Service Delivered

Reports ▶

Filtered By Type All Notificati

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- You will now be on the **Daily Service Delivered** search page. This page will allow you to search for “**accepted**” service authorizations for **ALL CLIENTS** with your provider agency for a specific date. It is from these service authorizations that you will be able to enter **SERVICE DELIVERED** data for that specific date. At least one piece of search criteria is required to successfully search.

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.
- **Service Element** = the service element that the client services are authorized under. Select from the drop down menu:
- **Procedure Code** = the service procedure code for a specific service authorized.
- **Svc Modifier Cd** = the specific service modifier code that corresponds to and further defines a service procedure code.
- **DHS Contract Num** = the contract number for the CDDP or Brokerage that has authorized the services for a client.
- ***Service Date** = the specific date that you are wishing to submit **SERVICE DELIVERED** entries for; will return all service authorizations that are active on this date. **This is a required field.**

Daily Service Delivered

The service authorization(s) shown indicate the total hours authorized for an individual's service. If the individual you provide services for has multiple providers, check with the employer to determine how many hours you are authorized to provide before providing service. For providers who share authorized hours of service for an individual with other providers, it is not guaranteed that you are authorized to work and receive payment for 100% of the limit shown. Services Delivered (SD) time entries should only be for actual dates/times worked providing the authorized service, which may be less than the limit shown on the authorization.

Client Prime:	<input type="text"/>	
Service Location/PSW SPD Provider ID:	<input type="text"/>	
Service Element:	<input style="width: 100%;" type="text"/>	
Procedure Code:	<input style="width: 100%;" type="text"/>	
Svc Modifier Cd:	<input style="width: 100%;" type="text"/>	
DHS Contract Num:	<input type="text"/>	
*Service Date:	<input type="text" value="6/15/2015"/>	

Enter the criteria you wish to use to search for service authorizations to bill against.

A Service Date is required.

Click **Find** to get results.

With the search criteria entered you wish to search by, click **Find** to return your search results.

The results 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.
- The data entry fields are open to accept the applicable data elements for that authorization procedure code.
- 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.

Change the list sort order by clicking the column headers.

Total Direct Support time for OR401 is entered here.

DHS Contract Num:		Date:		Find	Edit Criteria	Reset		
Name		Service Location/PSW						
LAST, First client #1 - xyz0000a				Provider - service location				
SPA ID	SE/Proc/Mod	Rate	Start	End	Units	Direct Support	Total	Status
4 *****6	54/OR542/W1	15 Hours/Week at \$20.75						
4 *****6	54/OR542/W2	15 Hours/Week at \$23.82						
LAST, First client #2 - mn555a5a				Provider - service location				
SPA ID	SE/Proc/Mod	Rate	Start	End	Units	Direct Support	Total	Status
3 *****8	54/OR401/W6	25 Hours/Week at \$56.25						

4. For each applicable client/service procedure code you wish to bill for on that **SINGLE DATE** (this example, the date is 12/1/15), enter the data needed in the corresponding fields to create that SD billing entry.

DHS Contract Num:

*Service Date: 12/1/2015

Find Edit Criteria Reset

Enter the Start/End times for when the service was provided on this date.

Click Add to add more rows for the same service.

LAST, First client #1 - xyz0000a				Provider - service location			
SPA ID	SE/Proc/Mod	Rate	Start	End	Units	Total	Status
4 *****6	54/OR542/W1	15 Hours/Week at \$20.75	7:47 AM	12:34 PM			Add
4 *****6	54/OR542/W2	15 Hours/Week at \$23.82	12:35 PM	1:52 PM			Add
Save All							

LAST, First client #2 - mn555a5a				Provider - service location				
SPA ID	SE/Proc/Mod	Rate	Start	End	Units	Direct Support	Total	Status
3 *****8	54/OR401/W6	25 Hours/Week at \$56.25	8:12 AM	2:26 PM		1:48		Add
Save All								

Enter the Direct Support time for code OR401 here. Data entered needs to be total Direct Support time for that SD billing, either in hh:mm format, or total minutes.

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

- Click **Save All** to save the data information entered.
- Click **Add** to add a new blank row of data fields for a specific service, if additional SD billing entries are needed for that same date.

5. 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.

SE/Proc/Mod	Rate	Start	End	Units	Total
54/OR542/W1	25 Hours/Week at \$20.75	8:07 AM	2:33 PM		
54/OR542/W2	25 Hours/Week at \$23.82	234p			

If you enter this, the system will auto-format the entry to be **2:34 PM**

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”

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

For **Hourly services:**

- 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).

6. With the **SERVICE DELIVERED** billing data entered and saved as **"draft"** SD entries, users can close the page.

Name		Service Location/PSW						
LAST, First client #1 - xyz0000a		Provider - service location						
SPA ID	SE/Proc/Mod	Rate	Start	End	Units	Total	Status	
4****G	54/OR542/W1	15 Hours/Week at \$20.75	7:47 AM	12:34 PM	4.47	\$99.18	Draft	Add
4****G	54/OR542/W2	15 Hours/Week at \$23.82	12:35 PM	1:52 PM	1.17	\$30.49	Draft	Add
Save All								
LAST, First client #2 - mn555a5a		Provider - service location						
SPA ID	SE/Proc/Mod	Rate	Start	End	Units	Direct Support(hh:mm)	Total	Status
3****G	54/OR401/W6	25 Hours/Week at \$56.25	8:12 AM	2:26 PM	6.14	1:48	\$350.44	Draft
Save All								

SDs are now saved in "draft" status

7. With the SD billing data saved and the entries created in "draft" status, users can repeat steps #3 – 6, to create new **DAILY SERVICE DELIVERED** entries for other another service date.

→ IMPORTANT: Users are no longer able to submit the "draft" SD billing entries created from **Daily Service Delivered** page.

- **Users can easily submit "draft" SD billing entries from the VIEW SERVICES DELIVRED page, just follow the next steps below.**

To submit "draft" Service Delivered entries:

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



9. In the **View Service Delivered** page, search by the **Status = "draft"** to get the SD billing entries in "draft" status you wish to submit for claims/payment processing. You may enter other search criteria to narrow your list of "draft" entries returned, but **you must search using the Status = "draft" to enable the submit permissions from this page.**

View Service Delivered

Enter one or more search criteria. Criteria are cumulative. Results returned are limited to 20,000 rows.

Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

Client Prime:

Location/PSN/Provider ID:

SHOW G.

Claim ICN:

Status: **Draft**

Show Aggregated(into claim): Both Aggregated Not Aggregated

Begin Date:

End Date:

Suspense Location:

Exception Code:

Max Displayed:

- From the results list, check the box to the far left of the entries you wish to submit. With the SD billing entries selected, click **Submit** at the bottom of the page.

Max Displayed: 25

Export options: CSV | Excel | PDF | RTF

All	SPA ID	Auth Status	Client Prime	Client Name	Provider	SE	Proc	Mod	Service Date	Begin Time	End Time	Group Setting	Service Hours/Units	Billed Units	Direct Support Hours/Units	Rate	Amount	SD ID	SD Status	Claim ICN
<input checked="" type="checkbox"/>	3****8	Accepted	mn55a5a	Client #1		54	OR401	W6	12/01/2015	08:12 AM	02:26 PM	No	6.14	6.14	1.48	\$56.25	\$350.44	5****4	Draft	
<input checked="" type="checkbox"/>	4****6	Accepted	xyz0000a	Client #2		54	OR542	W1	12/01/2015	07:47 AM	12:34 PM	No	4.47	4.47	NA	\$20.75	\$99.18	5****2	Draft	
<input checked="" type="checkbox"/>	4****6	Accepted	xyz0000a	Client #2		54	OR542	W2	12/01/2015	12:35 PM	01:52 PM	No	1.17	1.17	NA	\$23.82	\$30.49	5****3	Draft	

Service Delivered found: 3 (displaying all rows)

Actions available by searching for **“draft”** SD billing entries:

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

11. Once the action is taken and the submit process completed, users will be taken to **Service Delivered Results** confirmation page showing the results of the submit action for each of the entries submitted.

Service Delivered Results												
SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
2457796	xyz000a	Name Client A	Provider / Service	SE54/OR401/W6	6/15/2015	07:45 AM	02:30 PM	6.750	\$56.25	\$379.69	Approved	Service Delivered is Approved
2464104	mn555r5a	Name Client B	Provider / Service	SE54/OR542/WG	6/15/2015	08:00 AM	12:00 PM	4.000	\$10.39	\$41.56	Approved	Service Delivered is Approved
2464114	mn555r5a	Name Client B	Provider / Service	SE54/OR542/WJ	6/15/2015	12:00 PM	01:45 PM	1.750	\$17.07	\$29.87	Approved	Service Delivered is Approved

12. **SERVICE DELIVERED** entries submitted for claims/payment processing and are in “approved” status will be aggregated into claims at 3:30 AM every business day. Any claims created will be processed for payment at approximately 5:30 PM the business day of or following the aggregation cycle. Entries submitted after the claims aggregation and payment processes have run will be included in the next business day’s cycle.