

## How to Create & Submit **Service Delivered (SD)** Billing Entries for **Ancillary Services**

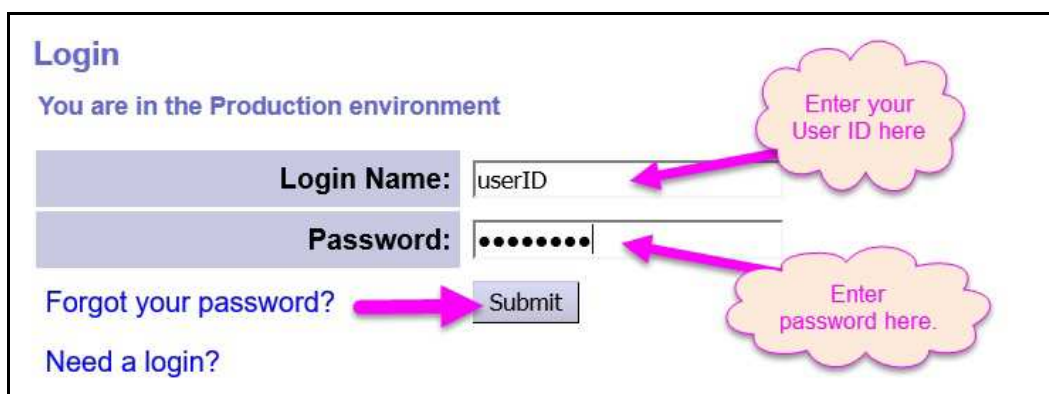
(Foster Care & Residential Providers)

For individuals with I/DD who are receiving other Ancillary Services to supplement their Residential or Foster Care services, those Ancillary services are authorized & billed using eXPRS Plan of Care processes.

The billing element for Ancillary services is called **SERVICE DELIVERED (SD)** billing entry. These **SERVICE DELIVERED (SD)** billing entries are the preliminary billing data components needed for POC claims processing. The SD billing data entries are added to the system by the authorized provider to document when/how much of the service was delivered to an individual. That SD billing data when submitted, is processed to be placed into claims for payment back to the provider.

### To create/submit **Service Delivered** entries for Ancillary Services:

1. Login to eXPRS. If you have more than one record associated to your eXPRS user account, select the applicable record for the service to be billed as the **Organization/Program Area**. Then click **SUBMIT** to login.



The screenshot shows the eXPRS Login page. At the top left, it says "Login" and "You are in the Production environment". Below this are two input fields: "Login Name:" with the text "userID" and "Password:" with a masked password of ".....". To the right of the "Login Name" field is a pink cloud-shaped callout that says "Enter your User ID here" with a pink arrow pointing to the field. To the right of the "Password" field is another pink cloud-shaped callout that says "Enter password here." with a pink arrow pointing to the field. Below the "Login Name" field is a link "Forgot your password?" with a pink arrow pointing to a "Submit" button. Below the "Submit" button is a link "Need a login?".

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



3. In the **Create Service Delivered from Single Service Authorization** search page, you will need to first search for your Ancillary Services authorizations that are active & ready to be billed. At least one piece of search criteria is required to successfully search. Using a service **date range** will likely be the easiest method to search.

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

How to use this page:

- Date range defaults to current month, but can be changed as needed.
- Use the below fields to select, enter or modify the search criteria as needed, then click Find to get a list of authorizations to bill against. The more criteria used, the more specific or narrow the results returned.
- If no results are found, use less criteria and search again.
- If still no results are found, authorizations returned are not in "accepted" status or are incorrect, please contact the CDDP or Brokerage who authorizes the services for your customers. They are responsible for entering and maintaining the authorizations.

For more instructions on entering Service Deliveries, please download and use this assistance guide: [How to Create Service Delivered Entries by PSW/IC-PSW Provider](#).

Please consult your Service Agreements for specific authorized UNIT amount details.

<b>Client Prime:</b>	<input type="text"/>	
<b>Service Location/PSW SPD Provider ID:</b>	<input type="text"/>	
<b>DHS Contract Num:</b>	<input type="text"/>	
<b>Service Element:</b>	<input type="text"/>	
<b>Procedure Code:</b>	<input type="text"/>	
<b>Svc Modifier Cd:</b>	<input type="text"/>	
<b>Effective Date:</b>	<input type="text" value="1/1/2018"/>	
<b>End Date:</b>	<input type="text" value="1/31/2018"/>	

**Exact:**  Yes  No

**Exact:**  Yes  No

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

If additional search criteria is needed, those criteria fields are defined as follows:

- **Client Prime** = the prime number for a specific I/DD individual receiving services.

- **Service Location/PSW SPD Provider ID** = the SPD provider ID number assigned to the Foster Care provider's record that was used in the service authorization.
- **DHS Contract Num** = the contact number for the CDDP who authorized the Ancillary services for the individual.
- **Service Element** = the service category for the services authorized. You may select an option from the drop-down menu, if you wish.
- **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 service date the authorization covers.
- **End Date** = the last service date the service authorization covers.

5. Any active authorizations that meet the search criteria entered will return in a results list below, grouped by individual.

Name		Service Location/PSW				
Client 1 Last Name, First - xyz000a		FC Provider Name - #####				
SPA#	Proc Code	Units	Unit	Frequency	Begin	End
18****70	ORAF - Adult FC services in SE158	30	Months	ProratedMonth	10/1/2017	9/30/2018
18****76	OR526 - Attendant Care, home or comm	90	Hours	Week	10/1/2017	9/30/2018
18****58	OR004 - Comm Transp, Mileage	30	Miles	Month	10/1/2017	9/30/2018

6. To view the authorization details, click on the blue SPA# to the far left.

Name		Service Location/PSW				
Client 1 Last Name, First - xyz000a		FC Provider Name - #####				
SPA#	Proc Code	Units	Unit	Frequency	Begin	End
18****70	ORAF - Adult FC services in SE158	30	Months	ProratedMonth	10/1/2017	9/30/2018
18****76	OR526 - Attendant Care, home or comm	90	Hours	Week	10/1/2017	9/30/2018
18****58	OR004 - Comm Transp, Mileage	30	Miles	Month	10/1/2017	9/30/2018

7. With the **View Service Prior Authorization** page open, you can view the details of the authorization, including:

1. The service authorized,
2. The service dates the authorization covers,
3. The rate authorized for the service.

**View Service Prior Authorization**

Please consult your Service Agreements for specific authorized UNIT amount details.

**Service Prior Authorization: 18\*\*\*\*7\*\*\*\*9 Status: Accepted**

**Client Prime:** xyz0000a **Client Name:** First Last

**Service:** SE257/OR526-Attendant Care, home or comm/ZE-2:1 staff authorized

**Rendering Provider:** FC Provider Name - 2\*\*\*\*9

**Service Location:** FC Provider Name - 2\*\*\*\*9

**Pay To Provider:** FC Provider Name - 2\*\*\*\*9

**DHS Contract Num:** 14\*\*\*0 - CDDP County

**Effective Date:** 10/1/2017 **End Date:** 9/30/2018

**Units:** 8.00 Hours per Week **Rate:** \$24.00

**Amount:** \$10,176.00 **Balance:** \$97.92

**Trust Reserve:** \$0.00 **Tax Reserve:** \$0.00

**SPA Created By:** **SPA Created Date:**

8. To bill for services provided, start from the results list and click on the \$ icon to the far right of the service you wish to bill.

→ **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				
Client 1 Last Name, First - xyz000a		FC Provider Name - #####				
SPA#	Proc Code	Units	Unit	Frequency	Begin	End
18****70	ORAF - Adult FC services in SE158	Months	Months	Prorated	Month	10/1/2017 9/30/2018
18****76	OR526 - Attendant Care, home or comm	Hours	Week	Week	Week	10/1/2017 9/30/2018
18****58	OR004 - Comm Transp. Mileage	Miles	Month	Month	Month	10/1/2017 9/30/2018

9. In the **Service Delivered by Service Authorization** page, you can now add the billing data information for when this service was provided. Click **Save All** after each entry to add a new row of blank fields for more data entry lines.

Some services may require different billing data:

- Hourly **Attendant Care** services will require a service **DATE** + the **START** and **END** time the service was provided.
- **Mileage** will require a service **DATE** + the **TOTAL MILES** being billed for the individual that date.

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



### Service Delivered By Service Authorization

Update an existing or add a new Date Time Entry Line

**IMPORTANT:** The Service Prior Authorization(s) (SPAs) shown below list the services you are authorized to provide to the individual(s) you work with, for the listed date range. Specific service limits (eg: the number of hours per week, number of miles per month, etc.) should be included in your Service Agreements(s) with your employer(s) for the individual(s) you are authorized to serve. Please consult your Service Agreements for specific authorized UNIT amount details. Service Delivered(SD) time entries should only be made for the actual dates and times worked providing the authorized service.

<b>Provider:</b> FC Provider - #####	<b>Dates:</b> 10/1/2017 - 9/30/2018
<b>Client Name:</b> First Last	<b>Client Prime:</b> xyz0000a
<b>CM Organization:</b> CDDP or Brokerage	
<b>Service:</b> SE257/OR526 - Attendant Care, home or comm/ZE - 2:1 staff authorized	
<b>Rate:</b> \$18.50	<b>Review Req:</b> Yes
<b>Units:</b> 2.00 Hours per Week	

Select	Date	Start Time (HH:MM AM/PM)	End Time (HH:MM AM/PM)	Total Service Time	Status
<input type="checkbox"/>				0:00	Draft

For items checked above

10. For entering **Start & End** times for **hourly Attendant Care** services, the start/end time fields do not require the colon, spaces or the full “AM” or “PM” when keying in 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.

**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”

11. With the **SERVICE DELIVERED** billing entry 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.

**Organization:** CDDP or Brokerage  
**Service:** SE257/OR526 - Attendant Care, home or comm/ZE - 2:1 staff authorized  
**Rate:** \$18.50

**Review Req:** Yes

Select	Date	Start Time (HH:MM AM/PM)	End Time (HH:MM AM/PM)	Total Service Time	Status
<input checked="" type="checkbox"/>	1/5/2018	2:00 PM	4:00 PM	2:00	Draft
<input checked="" type="checkbox"/>	1/15/2018	3:00 PM	5:00 PM	2:00	Draft
<input checked="" type="checkbox"/>	1/25/2018	4:17 PM	5:21 PM	1:04	Draft
<input type="checkbox"/>					Draft

For items checked above

Actions available:

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

12. Once the action is taken, the status will change for the SD billing entries, showing the results of the action.

If the **Review Req** field is listed as **YES** on the authorization (as shown in the next example), when submitted SD billing entries will be moved to ***pending*** status for the authorizing CDDP to review if they have cleared all other validation edits.

**Organization:** CDDP or Broker  
**Service:** SE257/OR526 - Attendant Care, home or comm/ZE - 2:1 staff authorized  
**Rate:** \$18.50

**Review Req:** Yes

Select	Date	Start Time (HH:MM AM/PM)	End Time (HH:MM AM/PM)	Total Service Time	Status
<input type="checkbox"/>	1/5/2018	02:00 PM	04:00 PM	2:00	Pending
<input type="checkbox"/>	1/15/2018	03:00 PM	05:00 PM	2:00	Pending
<input type="checkbox"/>	1/25/2018	04:17 PM	05:21 PM	1:04	Pending
<input type="checkbox"/>					Draft

5:04

For items checked above

13. Users can now close the window/tab they were working in and return to the search results. From the results list, select another service to be billed by clicking the \$ icon next to the service authorization line.
14. Repeat steps #8 – 12, to create new **SERVICE DELIVERED** billing entries for other individuals and/or services.
15. For SD billing entries that move to a status other than *pending* or *approved*, providers can use the [Service Delivered Problem Solving Matrix](#) on the [eXPRS Help Menu](#) to assist in troubleshooting.