

## How to Find/View Claims for Services Authorized with the “Generic” Provider Option in POC (CDDP/Brokerages/CIIS)

For services authorized and paid via eXPRS/Plan of Care utilizing the “generic” provider option, CDDPs and Brokerages often need to find those “generic” service claims to track when and how much they received to then pay to the actual provider or vendor of the “generic” authorized service.

This assistance guide will show how CDDP/Brokerage staff can search for those claims for “generic” authorized services. Please note: this guide is addressing actual **aggregated claims** that generate payment, not Service Delivered billings. To view Service Delivered billings, please see instructions in the assistance guide [How to Find-View Service Delivery Entries](#) on the eXPRS Help Menu.

Users will need one of the below roles/permissions to view claims:

- **Local Auth Claims Coordinator** (for CDDP staff)
- **Local Auth POC Claims Manager** (for CDDP staff)
- **Brokerage Claims Coordinator** (for Brokerage staff)
- **Brokerage POC Claims Manager** (for Brokerage staff)

### To Find/View POC “generic” service claims:

1. Login in to eXPRS. If users have more than one organization login option, they will need to be logged in under the **Local Authority** (for CDDPs shown below)

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

<b>Login Name:</b>	<input type="text" value="userID"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Organization/Program Area:</b>	<input type="text" value="County (Local Authority)"/>

[Forgot your password?](#)

or **Contractor** (for Brokerages) Organization role.

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

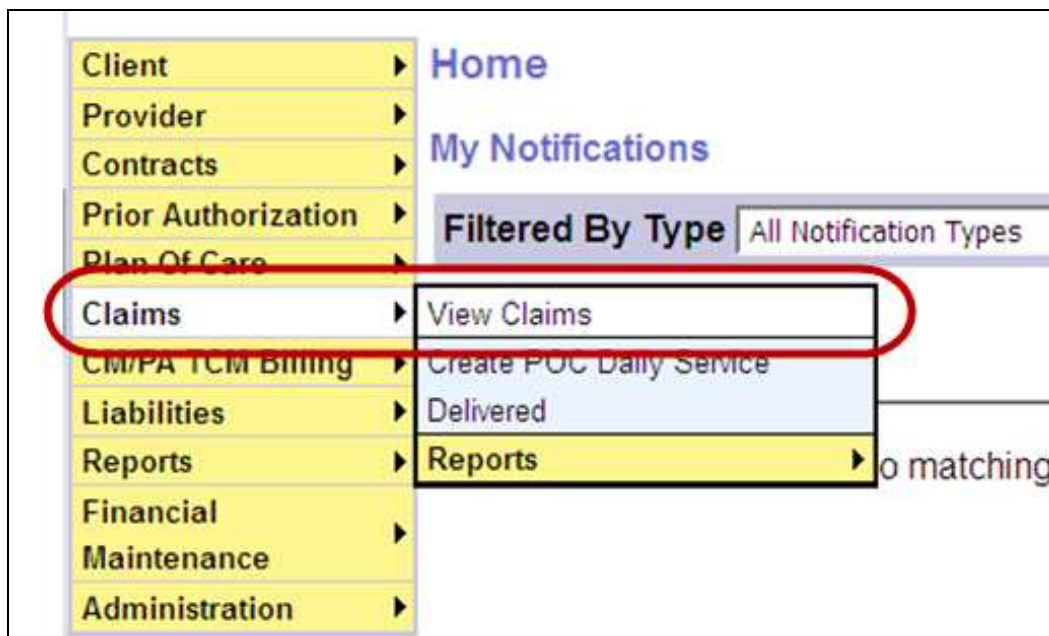
**Login Name:**

**Password:**

**Organization/Program Area:**  ▼

[Forgot your password?](#)

- From the left-hand, yellow navigational menu, click on **Claims** → **View Claims**. This will take you to the **Claims Search** page.



- Once in the **Claims Search** page - to search for claims specific to “generic” authorized POC services, enter the number “2” in the **SERVICE LOCATION** field. The number “2” is the service location ID number assigned for the “generic” provider option.

Users can also enter other search criteria the corresponding field(s) (such as **CLIENT PRIME** or **PROCEDURE CODE**) to further narrow the search results returned, if desired.

### Claims Search

Enter one or more search criteria. Partial matches are supported for Claim ICN only. Search is not case sensitive. 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.

Claim ICN:  Status:

Service Element:

Procedure Code:

Svc Modifier Cd:

Run ID:  Claim Modifier Cd:

DHS Contract Num:  Client Prime:

Provider ID:  Pay To Provider ID:

**Service Location: 2**

Effective Date:  End Date:

Exact:  Yes  No

Created From:  Created To:

Submitted From:  Submitted To:

Type:

Exception Code:

PA Adj #:

Show Notes?:  Yes  No

Suspense Location:

Created By:

Max Displayed: 25

Show Run ID/Date?  Yes  No

Click FIND to get search results.

4. Any claims for “generic” authorized POC services in the system that meet the search criteria entered will be returned in a list below the search field section.

The results list columns and data are defined as:

Claim ICN	Client Prime	Client Name	Service Element	Procedure Code	Svc Modifier Cd	Claim Modifier Cd	Type
<a href="#">2015xxxxxxxx001</a>	xyz0000a	Last Name, First Name	151	S5165	NA	REG	FFS
<a href="#">2015xxxxxxxx001</a>	xyz0000a	Last Name, First Name	151	S5165	NA	REG	FFS

- **Claim ICN** = the system generated number assigned to that claim. It is a hyperlink that will take the user to View Claim page to view the details of that specific claim.
- **Client Prime** = the prime number for the client for whom services are being paid.

- **Client Name** = the name of the client for whom services are being paid.
- **Service Element** = the service category for the services authorized and for which the claim is paid.
- **Procedure Code** = the service procedure code for the service authorized and for which the claim is paid.
- **Svc Modifier Cd** = the service modifier code for the service authorized and for which the claim is paid.
- **Claim Modifier Cd** = the claim modifier code for the service authorized and for which the claim is paid; may be used to identify the claim paid for a specific reason, such as an absence/bed hold reason.
- **Type** = the type of claim being paid; FFS means “fee for services”.

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

Provider	Service Location	Effective Date	End Date	Billed Amount	Paid Amount	Status	Run ID	Paid Date
Long Term Support for Children Provider	Generic Provider	7/20/2015	7/20/2015	\$13,105.37	\$13,105.37	Approved	144190006	9/11/2015
Long Term Support for Children Provider	Generic Provider	3/17/2015	3/17/2015	\$2,847.78	\$2,847.78	Approved	144190006	9/11/2015

- **Provider** = the parent agency provider being paid for the services.
- **Service Location** = the specific service location of the provider agency for which the service is authorized. **For “generic” authorized services, this will say “Generic Provider”.**
- **Effective Date** = the first date in the date range of the services paid in the claim.
- **End Date** = the last date in the date range of the services paid in the claim.
- **Billed Amount** = the amount the claim was billed.
- **Paid Amount** = the amount actually paid in the claim; this can be the same or lesser than the billed amount.
- **Status** = the status of the claim.

- **Run ID** = the SFMA run ID that the claim was included in for funds disbursement from DAS to the CDDP or Brokerage.
- **Payment Date** = the date the SMFA process was run and funds dispersed from DAS.

5. Users can export the list of claims using the export options to the upper right of the list, if they wish.

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

Provider	Service Location	Effective Date	Procedure Code	Procedure Description	Paid Amount	Status	Run ID	Paid Date
Long Term Support for Children Provider	Generic Provider	7/20/2015			\$13,105.37	Approved	144190006	9/11/2015
Long Term Support for Children Provider	Generic Provider	8/17/2015	8/17/2015		\$2,847.78	Approved	144190006	9/11/2015

Use one of these options to export the results list to a document.

6. By clicking on the **blue ICN number** in the far left column, users can open a specific claim to view the claim details.

Claim ICN	Client Prime	Service	Procedure Code	Svc Modifier Cd	Claim Modifier Cd	Type	
<a href="#">2015xxxxxxxx001</a>	xyz0000a	Last Name	S5165	NA	REG	FFS	
<a href="#">2015xxxxxxxx001</a>	xyz0000a	Last Name, First Name	151	S5165	NA	REG	FFS

Click the blue ICN to open & view the claim details.

7. To view the associated **SERVICE DELIVERED** entries that are included in that claim, scroll to the bottom of the claim, and expand the section labeled **Service Delivered**.

**Claim View**

<b>ICN:</b>	2015xxxxxxxxxx001	<b>Status:</b>	Approved	<b>Type:</b>	Fee For Service
<b>Service Element:</b>	151	<b>Proc Code:</b>	S5165	<b>Svc Modifier Cd:</b>	NA
<b>Client Prime:</b>	xyz0000a	<b>Client Name:</b>	FIRST LAST NAME		
<b>Provider ID:</b>		<b>Provider:</b>	Long Term Support for Children Provider		
<b>Service Location:</b>	{Generic} Sam's Van Builder	<b>Claim Modifier Cd:</b>	REG		
<b>DHS Contract Num:</b>	999999	<b>Contractor Name:</b>	County		
<b>PA Adj #:</b>	49xxxxx8	<b>Effective</b>	7/20/2015	<b>End Date:</b>	7/20/2015
<b>Run ID:</b>	144190006	<b>Effective</b>	000	<b>Billed Amount:</b>	\$13,105.37
<b>Priced Amount:</b>	\$13,105.37	<b>Deduct:</b>	\$0.00	<b>Paid Amount:</b>	\$13,105.37
<b>Paid Date:</b>	9/11/2015 5:30:12 PM PDT	<b>Prov Liab Deduct:</b>	\$0.00	<b>Net Payment:</b>	\$13,105.37
<b>Submitted:</b>	9/11/2015 3:37:06 AM PDT	<b>Processed:</b>	9/11/2015 3:37:07 AM PDT	<b>Reversed:</b>	
<b>Notes:</b>					
<b>Replaced Claim:</b>					
<b>Created By:</b>	Allotment Claims Scheduled Process	<b>Created Date:</b>	9/11/2015 3:37:06 AM PDT		
<b>Updated By:</b>	Allotment Claims Scheduled Process	<b>Updated Date:</b>	9/11/2015 3:37:07 AM PDT		

**Service Location:** {Generic} Sam's Van Builder

Will show the provider/vendor information as typed in on the POC auth.

**Exceptions:**

There are no current exceptions for this claim

**Exception history:**

There are no historical exceptions

The SD billings included in the claim are listed here.

**Segments**

**Services Delivered**

Service Date	Begin Time	End Time	Service Units	Created Date	Review Date	Status	ID
7/20/2015	12:00 AM	12:00 AM	1.00	9/10/2015 10:50:26 AM PDT		Approved	49XXXX9

**Provider Liability deductions**

There are no provider liability deductions for this claim