

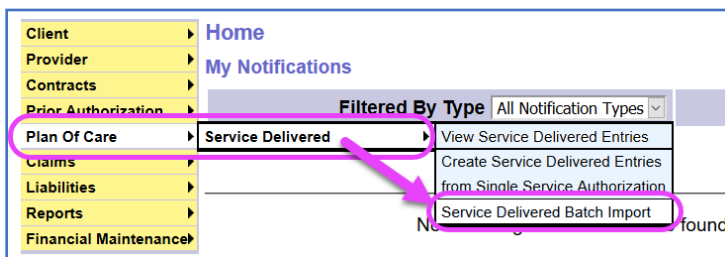
Using the Service Delivered Import Process

Agency Providers that have successfully completed testing the Service Delivered Import Process can use it to import billings in **Draft** status.

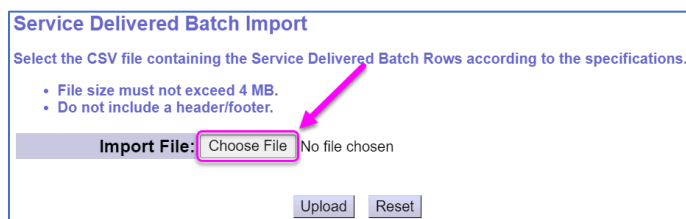
- Staff with the **Provider Agency SD Importer** role can import billings
- Staff with the **Provider Agency Claims Manager** role can submit billings.

Importing a CSV File

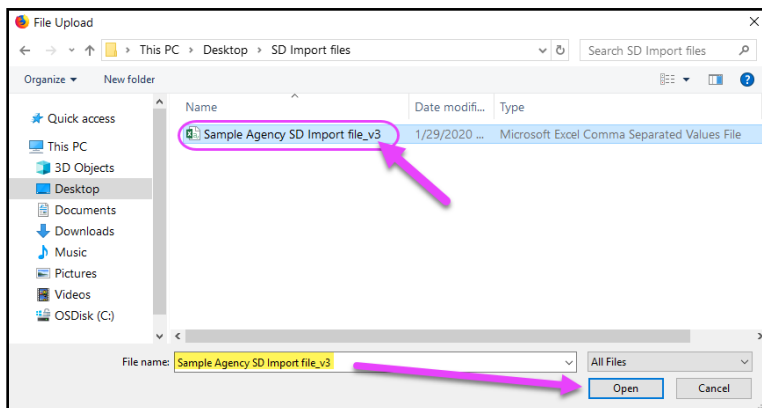
1) Select **Plan of Care > Service Delivered > Service Delivered Batch Import**.



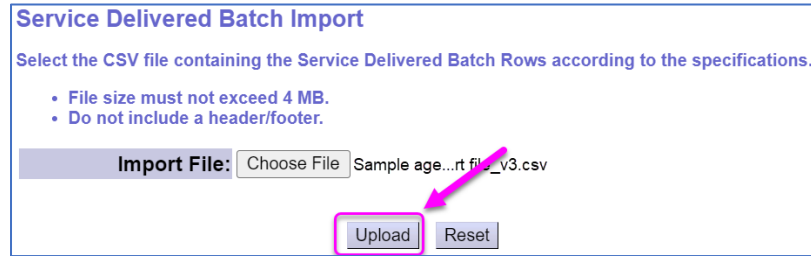
2) On the **Service Delivered Batch Import** page, click the **Choose File** button.



3) Select the CSV file and click **Open**.

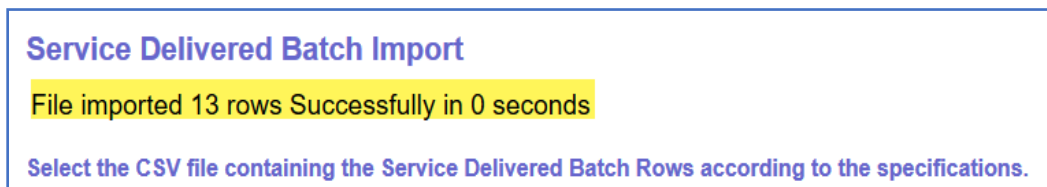


4) Click the **Upload** button.



Tip: Use the **Reset** Button to remove the file selected if you chose the wrong one in error.

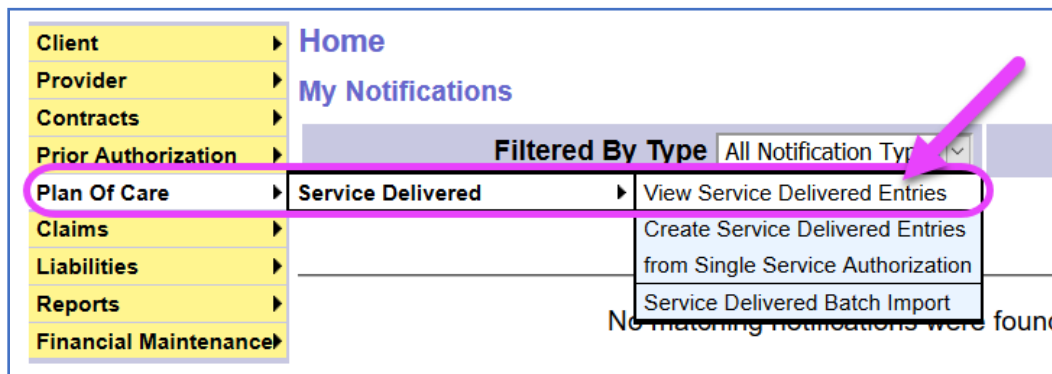
5) A successful import will display the message similar to the one shown below.¹



Tip: If your file is large, the upload process may take a longer time, and you may experience a timeout warning in eXPRS. Select the **I'm still here** button if you receive this message.

Submitting Draft Service Delivered Billing Entries

1. Select **Plan of Care > Service Delivered > View Service Delivered Entries**.



2. Search for the **Draft** SDs by using the recommended criteria shown below and click **Find**.

a) **Status:** Select **Draft** (This enables the checkboxes needed for mass submission).

¹ Use the guide: **Agency SD Import – Error Management** to troubleshoot data errors if you encounter them during the upload process.

- b) **Create From:** Enter the date the CSV import file was uploaded (This will be the date the **Draft SDs** were created).
- c) **Create To:** Enter the same date used in the **Create From** field.

View Service Delivered

Enter one or more search criteria. Criteria are cumulative. Results returned are limited to 5,000 rows.
 Note: If criteria entered results in more than 5,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

Client Prime:

Service Location/PSW SPD Provider ID:

Rendering/Agency eXPRS Provider ID:

DHS Contract Num:

Service Prior Auth#:

Service Element:

Procedure Code:

Svc Modifier Cd:

Show EVV:

Show Group Only:

Claim ICN:

Status: **Draft**

Show Aggregated(into claim): Both Aggregated Not Aggregated

Begin Date: End Date:

Submitted From: Submitted To:

Created From: 1/29/2020 **Created To: 1/29/2020**

Suspense Location:

Exception Code:

Max Displayed: 25

3. From the results, select the checkboxes for **Draft SD Billings** and click **Submit**.

Exception Code:

Max Displayed: 25

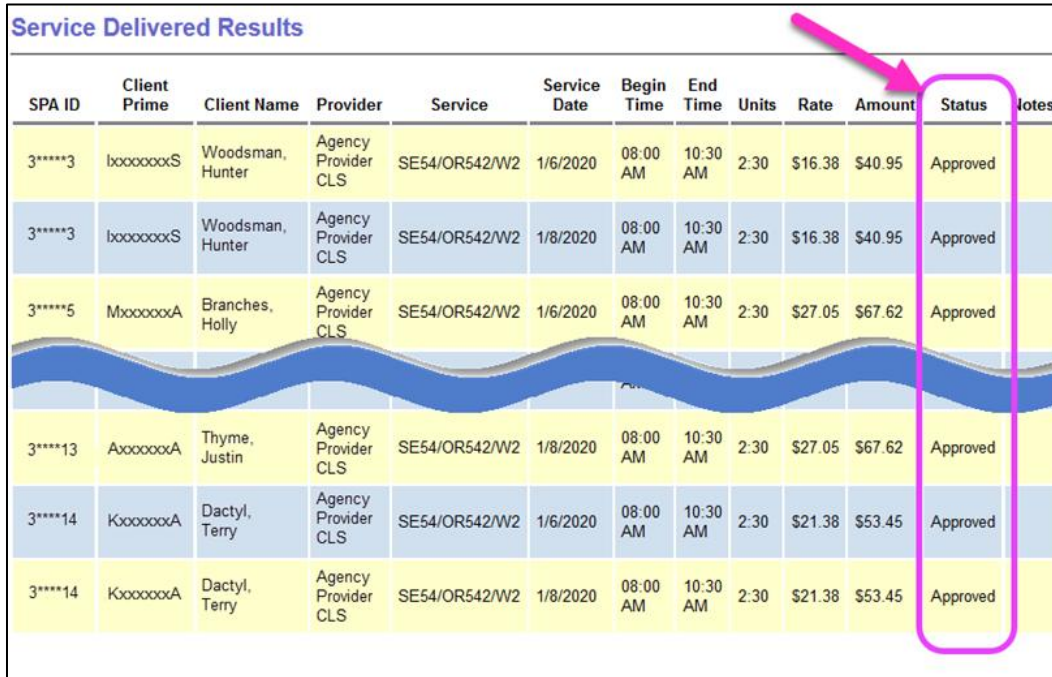
Export options: CSV Excel PDF RTF

<input checked="" type="checkbox"/>	SPA ID	Auth Status	SD ID	Client Prime	Client Name	Provider	Direct Support Professional	DHS Contract Num	Contractor Name	SE	Proc	Mod	Service Date	Begin Time	End Time	Group Setting	Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD Status	Claim ICN	Begin Location	End Location
<input checked="" type="checkbox"/>	3*****3	Accepted		b00000S	Woodsman, Hunter	Agency Provider CLS			Marion County	54	OR542	W2	01/06/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$16.38	\$40.9	Draft			
<input checked="" type="checkbox"/>	3*****3	Accepted		b00000S	Woodsman, Hunter	Agency Provider CLS			Marion County	54	OR542	W2	01/08/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$16.38	\$40.9	Draft			
<input checked="" type="checkbox"/>	3*****5	Accepted		M00000A	Branches, Holly	Agency Provider CLS			Marion County	54	OR542	W2	01/06/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$27.05	\$67.6	Draft			
<input checked="" type="checkbox"/>	3*****13	Accepted		A00000A	Thyme, Justin	Agency Provider CLS			Polk County	54	OR542	W2	01/08/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$27.05	\$67.6	Draft			
<input checked="" type="checkbox"/>	3*****14	Accepted		K00000A	Dactyl, Terry	Agency Provider CLS			Polk County	54	OR542	W2	01/06/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$21.38	\$53.4	Draft			
<input checked="" type="checkbox"/>	3*****14	Accepted		K00000A	Dactyl, Terry	Agency Provider CLS			Polk County	54	OR542	W2	01/08/2020	08:00 AM	10:30 AM	No	2:30	2:30	NA	\$21.38	\$53.4	Draft			

Total Approved: 0 \$0.00
Total Denied: 0 \$0.00
Total Draft: 13 \$701.49
Total Pending: 0 \$0.00
Total Rejected: 0 \$0.00
Total Suspended: 0 \$0.00
Total Void: 0 \$0.00

Service Delivered found: 13 (displaying all rows)

4. After submission the **Service Delivered Results** page will display.



SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
3*****3	lx*****S	Woodsman, Hunter	Agency Provider CLS	SE54/OR542/W2	1/6/2020	08:00 AM	10:30 AM	2:30	\$16.38	\$40.95	Approved	
3*****3	lx*****S	Woodsman, Hunter	Agency Provider CLS	SE54/OR542/W2	1/8/2020	08:00 AM	10:30 AM	2:30	\$16.38	\$40.95	Approved	
3*****5	M*****A	Branches, Holly	Agency Provider CLS	SE54/OR542/W2	1/6/2020	08:00 AM	10:30 AM	2:30	\$27.05	\$67.62	Approved	
3*****13	A*****A	Thyme, Justin	Agency Provider CLS	SE54/OR542/W2	1/8/2020	08:00 AM	10:30 AM	2:30	\$27.05	\$67.62	Approved	
3*****14	K*****A	Dactyl, Terry	Agency Provider CLS	SE54/OR542/W2	1/6/2020	08:00 AM	10:30 AM	2:30	\$21.38	\$53.45	Approved	
3*****14	K*****A	Dactyl, Terry	Agency Provider CLS	SE54/OR542/W2	1/8/2020	08:00 AM	10:30 AM	2:30	\$21.38	\$53.45	Approved	

Tip: Submitting a large number of **Draft** SDs for approval may exceed the 20-minute session timeout in eXPRS. If you are prompted, select the **I'm still here!** Button to keep your session active.