Agency Providers
How to SUBMIT Service Delivered Billing Entries (SDs)
as a Batch in eXPRS/POC

Users can search for and submit **Draft** Service Delivered Billing Entries (SDs) in a batch process. This is very useful when submitting multiple SDs at one time, such as those uploaded using the Agency SD Batch Import Process.

TIP: If there are EVV SDs that need corrections or edits, it is best practice to do that while they are in **Draft** status (before submission). See the How to Correct an EVV Shift – Agency Provider guide for more information.

To submit multiple SD billings as a batch:
Users with the **Provider Agency Claims Manager** role can complete these steps

1. Log in to **eXPRS.**

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

3. On the **View Service Delivered** page, enter search criteria to find your **Draft** SDs and select **Find**. Depending on the group of *draft* SD billing entries you're wanting to submit, the search criteria you use may be different. For SDs uploaded via the **Agency SD Import** process, use the search criteria:
    o   **STATUS[1]** = Draft
    o   **CREATE FROM** = The date you uploaded your **.CSV** SD Import file

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[1] A **Status** is required to enable Batch Submission

o **CREATE TO** = The date you uploaded your **.CSV** SD Import file

To find other draft SD billing entries, use the search criteria:
- o **STATUS²** = Draft
- o **BEGIN DATE** = The first date the service was provided
- o **END DATE** = The last date the service was provided
- o **CLIENT PRIME** = Used to search for a specific individual's SD billings
- o **PROCEDURE CODE** = Used to search for SD billings for a specific service.

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² A **Status** is required to enable Batch submission

Agency - Batch Submit SDs (v5; 8.2.22)

4. From the results, select the checkbox(es) for the SDs to be submitted, then click **Submit**.

5. When the submission process completes, users will be taken to a confirmation page.

Service Delivered Results

SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
######	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/2/2020	08:45 AM	03:30 PM	6:45	$27.28	$184.14	Approved	
######	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/3/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	
######	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/6/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	
######	abc9999x	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/7/2020	08:45 AM	03:30 PM	6:45	$27.28	$184.14	Approved	
######	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/8/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	
######	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/9/2020	08:45 AM	03:30 PM	6:45	$27.28	$184.14	Approved	
######	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/10/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	

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Tip: Large numbers of SD billings submitted at one time may take a while to process. Waiting for the confirmation page to return is not necessary. A user can submit SDs and return later, then search for the results by using the **Submit To** & **Submit From** dates in the Search Criteria.