

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:
 - **STATUS**¹ = Draft
 - **CREATE FROM** = The date you uploaded your **.CSV** SD Import file

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

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

To find SDs from Agency SD Import

The date you uploaded your SD Import .CSV file

Status: Draft

Created From: 1/29/2020

Created To: 1/29/2020

Find **Reset**

To find other draft SD billing entries, use the search criteria:

- **STATUS²** = Draft
- **BEGIN DATE** = The first date the service was provided
- **END DATE** = The last date the service was provided
- **CLIENT PRIME** = Used to search for a specific individual's SD billings
- **PROCEDURE CODE** = Used to search for SD billings for a specific service.

To find other draft SD billings.

Status: Draft

Begin Date: 1/1/2020

End Date: 1/31/2020

Procedure Code: [Highlighted]

Dates the Service was provided.

Find **Reset**

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

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

Find Reset

Export options: CSV

All	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
<input checked="" type="checkbox"/>	#####	Accepted	#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	Mary Smith	#####	CME Name	49	OR526	NA	01/02/2020	08:45 AM	03:30 PM	No	6.45	6.45	NA	\$27.28	\$184.14	Draft
<input checked="" type="checkbox"/>	#####	Accepted	#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	Mary Smith	#####	CME Name	49	OR526	NA	01/03/2020	09:00 AM	03:30 PM	No	6.30	6.30	NA	\$27.28	\$177.32	Draft
<input checked="" type="checkbox"/>	#####	Accepted	#####	abc9999x	IDBJOBM RWUHMR	Agency Provider	Sam Jones	#####	CME Name	49	OR526	NA	01/06/2020	09:00 AM	03:30 PM	No	6.30	6.30	NA	\$27.28	\$177.32	Draft
<input checked="" type="checkbox"/>	#####	Accepted	#####	abc9999x	IDBJOBM RWUHMR	Agency Provider	Sam Jones	#####	CME Name	49	OR526	NA	01/07/2020	08:45 AM	03:30 PM	No	6.45	6.45	NA	\$27.28	\$184.14	Draft
<input checked="" type="checkbox"/>	#####	Accepted	#####	abc9999x	IDBJOBM RWUHMR	Agency Provider	Sam Jones	#####	CME Name	49	OR526	NA	01/08/2020	09:00 AM	03:30 PM	No	6.30	6.30	NA	\$27.28	\$177.32	Draft
<input checked="" type="checkbox"/>	#####	Accepted	#####	kwv0000y	JCAIPAN QXGVGNQ	Agency Provider	Mary Smith	#####	CME Name	49	OR526	NA	01/09/2020	08:45 AM	03:30 PM	No	6.45	6.45	NA	\$27.28	\$184.14	Draft

(displaying all rows)

Submit Delete

- 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	

Previous Close

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.