

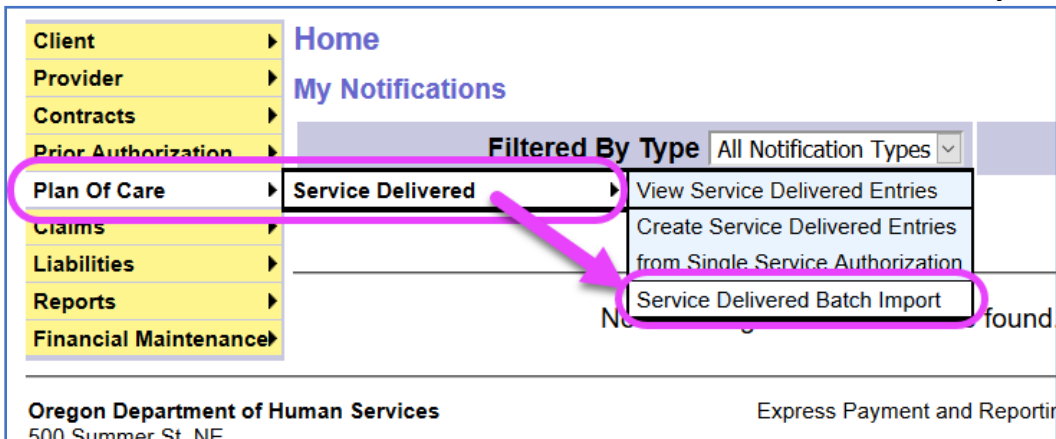
DD Agency Provider Service Delivered Billing Entry (SD) Batch Import Process: How to Import SD .CSV File

eXPRS supports the mass (or batch) import of Service Delivered (SD) Billing Entry data for DD Agency Providers.

Once an Agency Provider has successfully generated and tested an acceptable .CSV file, staff with the **Provider Agency SD Importer** role can begin to use this process to import and create SDs in **Draft** status. Once those are created, staff with the **Provider Agency Claims Manager** role can do the submission work for these SDs. The same staff member may have both roles.

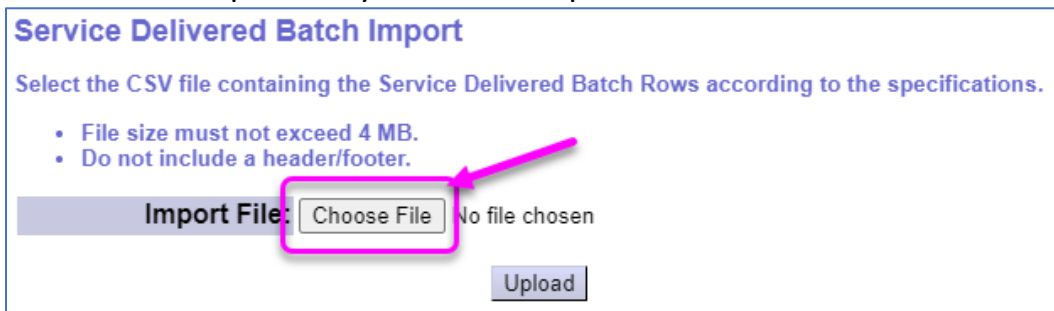
To Upload a .CSV file & Import SD billing entries:

1. Login to eXPRS.
2. Select **Plan of Care > Service Delivered > Service Delivered Batch Import**.



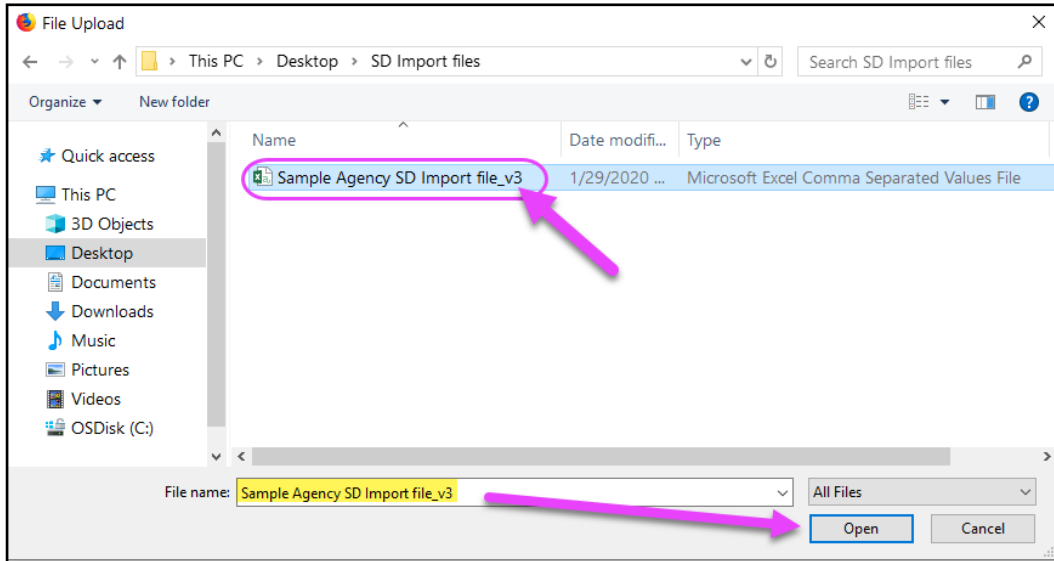
The screenshot shows the eXPRS navigation menu. The 'Plan Of Care' menu item is highlighted with a pink box. A pink arrow points from this menu item to a sub-menu where 'Service Delivered' is selected. Another pink arrow points from 'Service Delivered' to a further sub-menu where 'Service Delivered Batch Import' is selected and highlighted with a pink box. The page footer includes 'Oregon Department of Human Services' and 'Express Payment and Reporting System'.

3. On the **Service Delivered Batch Import** page, click the **Choose File** button to select the .CSV import file you want to upload.

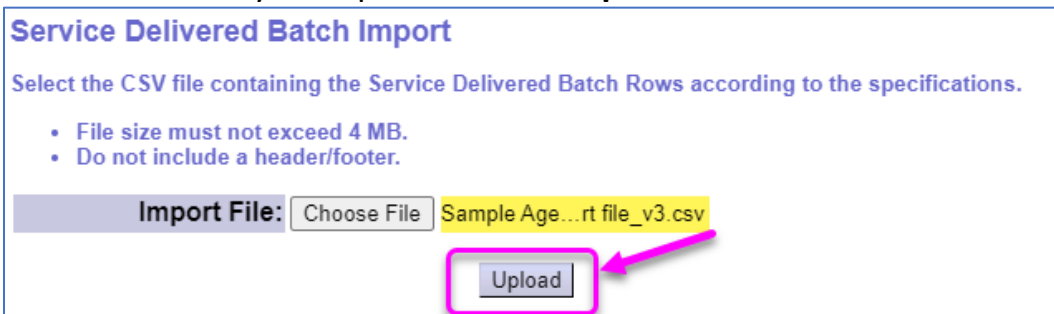


The screenshot shows the 'Service Delivered Batch Import' page. It includes instructions: 'Select the CSV file containing the Service Delivered Batch Rows according to the specifications.' and a list of requirements: 'File size must not exceed 4 MB.' and 'Do not include a header/footer.' Below this, there is an 'Import File:' label, a 'Choose File' button (highlighted with a pink box and arrow), and the text 'No file chosen'. An 'Upload' button is located at the bottom right of the form area.

4. Select the .CSV file and click **Open**.

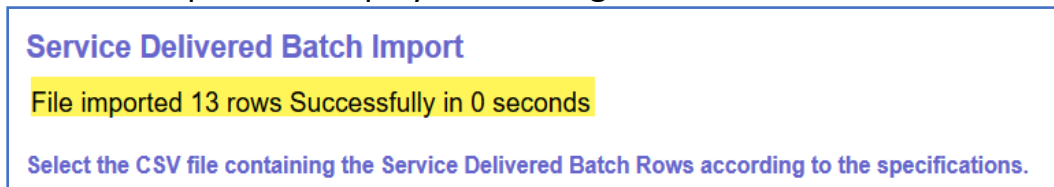


5. The file is now ready to import. Click the **Upload** button.



TIP: Use the [Agency SD Import – Error Management](#) to troubleshoot data errors if you encounter them during the upload process.

6. A successful import will display the message similar to the one shown below.



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.

To Submit the Draft SD Billing Entries:

1. Staff with the **Provider Agency Claims Manager** role can find the **Draft** SDs by selecting **Plan of Care > Service Delivered > View Service Delivered Entries**.

The screenshot shows a navigation menu on the left with the following items: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, Liabilities, Reports, and Financial Maintenance. The 'Plan Of Care' item is expanded to show 'Service Delivered', which is further expanded to show 'View Service Delivered Entries', 'Create Service Delivered Entries from Single Service Authorization', and 'Service Delivered Batch Import'. A pink arrow points to the 'View Service Delivered Entries' option. Above this menu, there is a 'Filtered By Type' dropdown menu set to 'All Notification Type'. Below the menu, the text 'No matching notifications were found' is visible.

2. On the **View Service Delivered** page, search for the **Draft** SDs by using the criteria shown below and click **Find**
 - **Status** = Select **Draft** (This enables the checkboxes needed for mass submission).
 - **Create From** = Enter the date the .CSV import file was uploaded (This will be the date the **Draft** SDs were created).
 - **Create To** = Enter the same date used in the **Create From** field.

The screenshot shows the 'View Service Delivered' search criteria form. The form includes the following fields and options:

- Client Prime: [Text Field]
- Service Location/PSW SPD Provider ID: [Text Field]
- Rendering/Agency eXPRS Provider ID: [Text Field]
- DHS Contract Num: [Text Field]
- Service Prior Auth#: [Text Field]
- Service Element: [Dropdown Menu]
- Procedure Code: [Dropdown Menu]
- Svc Modifier Cd: [Dropdown Menu]
- Show EVV:
- Show Group Only:
- Claim ICN: [Text Field]
- Status: **Draft** (Selected in a dropdown menu)
- Show Aggregated(into claim): Both Aggregated Not Aggregated
- Begin Date: [Text Field]
- End Date: [Text Field]
- Submitted From: [Text Field]
- Submitted To: [Text Field]
- Created From: **1/29/2020** (Selected in a dropdown menu)
- Created To: **1/29/2020** (Selected in a dropdown menu)
- Suspense Location: [Dropdown Menu]
- Exception Code: [Text Field]
- Max Displayed: 25 (Selected in a dropdown menu)

A pink arrow points to the 'Find' button at the bottom of the form.

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

The screenshot shows a software interface with various filters and a table of SD billings. The filters include Status (Draft), Show Aggregated (Both, Aggregated, Not Aggregated), Begin Date, Submitted From, Created From, Suspense Location, Exception Code, and Max Displayed (25). The table has columns for 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 Hour/Units, Billed Units, Total Direct Support Time, Rate, Amount, SD Status, Claim ICH, Begin Location, and End Location. A summary section shows: 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. A 'Submit' button is located at the bottom right.

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

The screenshot shows the 'Service Delivered Results' page with a table of SD billings. The table has columns for SPA ID, Client Prime, Client Name, Provider, Service, Service Date, Begin Time, End Time, Units, Rate, Amount, Status, and Notes. The Status column is circled in pink. The table contains 6 rows of data, all with a Status of 'Approved'.

SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
3*****3	lxxxxxxS	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	lxxxxxxS	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	MxxxxxxA	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	AxxxxxxA	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	KxxxxxxA	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	KxxxxxxA	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: Large numbers of SD billings submitted at one time may take a while to process. Check the **View Service Delivered** page at a later time to see the new status of the SDs you submitted.