

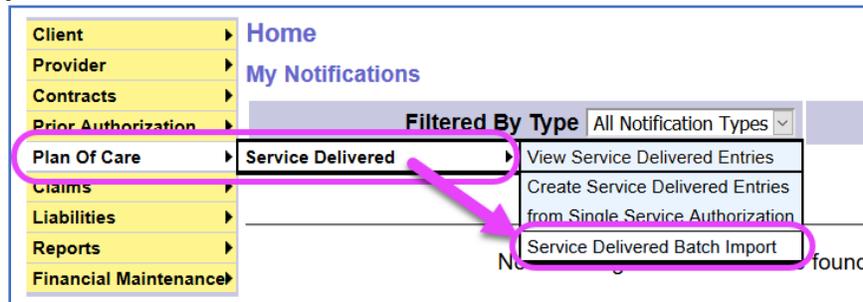
How to Import a CSV File Using the Service Delivered (SD) Import Process

Once an Agency Provider has successfully generated and tested importing an acceptable CSV file, they can use this process to import and create SDs in **Draft** status. After creation of the SDs, staff with the **Provider Agency Claims Manager** role can submit them.

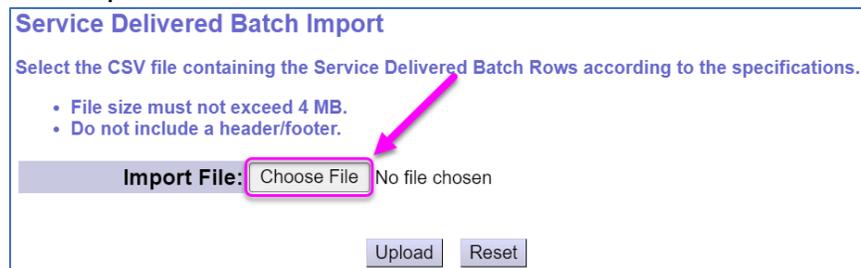
To complete the following work a user must have the **Provider Agency SD Importer** role.

To Upload a CSV file & Import SD billing entries:

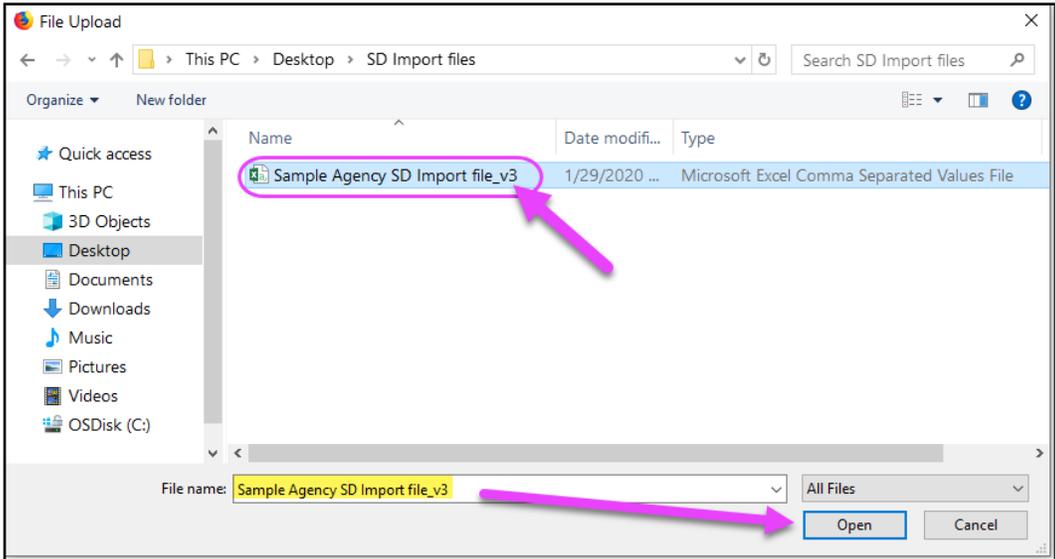
- 1) Login to eXPRS and select **Plan of Care > Service Delivered > Service Delivered Batch Import**.



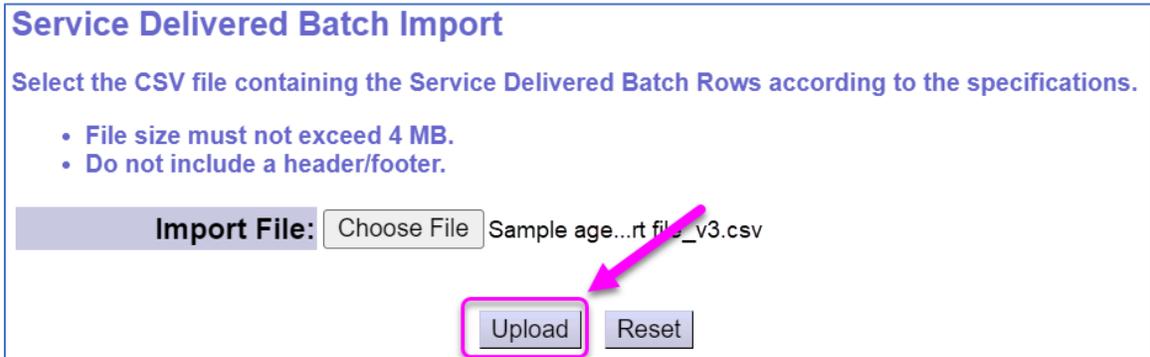
- 2) On the **Service Delivered Batch Import** page, click the **Choose File** button to select a file to upload.



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

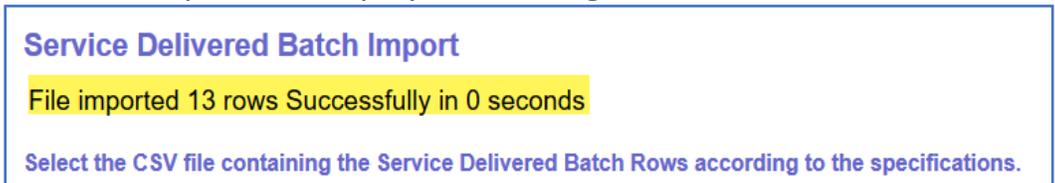


4) The file is now ready to import. Click the **Upload** button.



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.

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

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

The screenshot shows the 'View Service Delivered' search criteria form. The form includes various input fields and dropdown menus. The 'Status' dropdown is set to 'Draft'. The 'Created From' and 'Created To' date fields are both set to 1/29/2020. A pink arrow points to the 'Find' button at the bottom of the form.

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**.

Status:
 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: Select...
 Exception Code:
 Max Displayed: 25
 Find Reset
 Export options: CSV Excel PDF RTF

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 ICD	Begin Location	End Location
3*****3	Accepted		lxxxxxxS	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			
3*****3	Accepted		lxxxxxxS	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			
3*****5	Accepted		MxxxxxxA	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			
3*****13	Accepted		AxxxxxxA	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			
3*****14	Accepted		KxxxxxxA	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			
3*****14	Accepted		KxxxxxxA	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)
 Submit Delete

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

Service Delivered Results

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	

Previous Close

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.