

DD Agency Provider Service Delivered Billing Entry (SD) Batch Import Process Overview

eXPRS supports the mass (or batch) import of Service Delivered Billing Entry (SD) data for DD Agency Providers. This document provides details on the process.

The SD Import Process:

1. Is available for DD Agency Providers only.
2. Requires an Agency Staff member that has the **Provider Agency SD Importer** role. This role can be requested by submitting the [User Enrollment Form](#).
 - The **SD Importer** role is designed to work with the **Provider Agency Claims Manager** role, which can submit **Draft** SDs.
3. Is available for specific Plan of Care (POC) services, such as those that require additional data for Electronic Visit Verification (EVV) and some Daily Residential Services.
 - Mileage, Event, or monthly type services must be entered manually.
4. Creates and imports SDs in **Draft** status.
 - Once imported, Agency Providers must submit SDs manually in eXPRS. Mass submission of **Draft** SDs is available.
5. Utilizes a specific filetype (.CSV - comma separated values) which contains the SD billing data in a specific data file layout format, found in the document: [Agency SD Import - .CSV File Format](#)
 - Agency Providers can create this .CSV file from their own internal systems, but it **must adhere to the specified layout & format in order to import successfully**.
 - If one or more data rows on the .CSV file imported contains an error, the file will be rejected. The Agency can download a version of the file which shows the errors so they can correct the issue & attempt the import again.

Agency Provider staff must successfully test their .CSV file in the eXPRS Practice environment before being assigned the **Provider Agency SD Importer** role.

NEXT STEPS:

1. Review the [Agency SD Import - .CSV File Format](#) document for the specific formatting details that your internal systems will need to produce on a .CSV file for importing SDs to eXPRS.
2. Send an email with the subject: “SD Import Process” to Info.eXPRS@odhsoha.oregon.gov to test and ensure the .CSV file successfully imports into eXPRS
3. Complete & submit the [User Enrollment Form](#) to request the **Agency Provider SD Importer** role for staff who will be doing the SD Import work.
4. Review the following SD Import guides:
 - [Agency SD Import – How to Upload .CSV File](#)
 - [Agency SD Import – Error Management](#)