

How to Accept or Reject Pending Service Delivered Billing Entries (SDs)


Some Service Delivered Billing Entries (SDs) submitted by a provider must be reviewed by the authorizing Case Management Entity (CME) before they are aggregated into claims for payment.


CME users will need one of the following roles to accept or reject Pending SDs:


- **CDDPs:** Local Authority POC Manager or POC Super User
- **Brokerages:** Brokerage POC Manager or POC Super User
- **State Kids Services:** State Kids Svcs POC Manager or POC Super User

How to Accept or Reject Pending SDs:

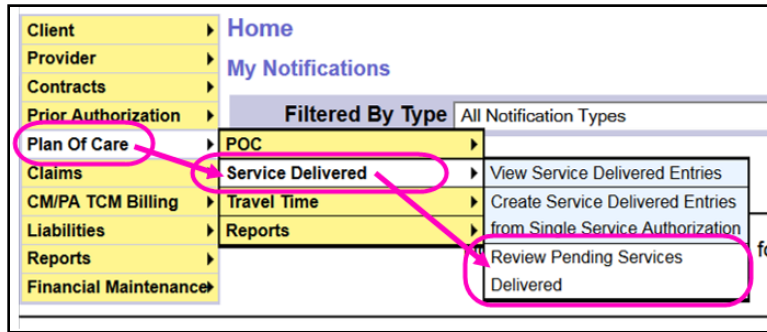
1) Login to eXPRS. If users have multiple login options, use the Local Authority (for CDDPs), Contractor (for Brokerage), or State for (State Kids).

Login Name:	<input type="text" value="userID"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="County (Local Authority)"/> 
Forgot your password?	<input type="button" value="Submit"/>

Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="Brokerage (Contractor)"/> 
Forgot your password?	<input type="button" value="Submit"/>

Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="State Kids (State)"/> 
	<input type="button" value="Submit"/>

2) Select **Plan of Care > Service Delivered > Review Pending Services Delivered**.



3) On the **Review Pending Service Delivered** page, enter criteria to search for pending SDs and select **Find**.

Review Pending Services Delivered

Service Location/PSW SPD Provider ID:

Rendering/Agency eXPRS Provider ID:

Client Prime:

Begin Date: End Date:

Submitted From: Submitted To:

Created From: Created To:

Pay To Provider ID:

Service Element:

Procedure Code:

Svc Modifier Cd:

Max Displayed: 25

Find

New search criteria options.

Add the search criteria desired OR ... leave blank to search for ALL pending SDs.

TIP: See Appendix A for a detailed explanation of the search criteria.

4) Review the results list and place a check in the box next to any SDs that will be **Approved** or **Rejected**. Then select either the **Approve** or **Reject** button.

	ID	SPA ID	Service Location	Client Prime	Client Name	SE	Proc	Mod	Service Date	Begin Time	End Time	Units	Rate	Amount	Original Submit Date
<input checked="" type="checkbox"/>	24****92	21****97	Provider Last, First	xyz0000a	First Last	151	OR526	NA	8/16/2018	10:30 AM	12:30 PM	2.00	\$14.65	\$29.30	8/28/2018
<input checked="" type="checkbox"/>	24****14	21****97	Provider Last, First	xyz0000a	First Last	151	OR526	NA	8/17/2018	10:00 AM	01:00 PM	3.00	\$14.65	\$43.95	8/28/2018
<input type="checkbox"/>	24****36	21****97	Provider Last, First	xyz0000a	First Last	151	OR526	NA	8/20/2018	10:30 AM	12:30 PM	2.00	\$14.65	\$29.30	8/28/2018

- **Close** = Closes the page
- **Reset** = Clears the results and resets the search criteria fields to blank
- **Approve** = Approves the selected SDs for claims aggregation processing.
- **Reject** = Rejects all the selected SDs for the **Reject Reason** selected in the dropdown above.

5) If SDs are being rejected, a **Reject Reason** must be selected. This reason will apply to all the selected SDs.

Reject Reason:		
<input type="checkbox"/>	All	None
<input type="checkbox"/>	11****9	54****7
<input type="checkbox"/>	11****5	54****7
<input type="checkbox"/>	11****2	54****7

- None
- Not consistent with documentation submitted by provider
- Not consistent with duties in provider's service agreement
- Not consistent with services actually provided to client
- Not consistent with services authorized
- Inadequate or incomplete documentation submitted
- Employer did not sign timesheet to verify service was received
- Entry is for an invalid/ineligible service date (client out of home or otherwise unable to receive service)
- To facilitate administrative plan/authorization updates or corrections
- Exceeds authorization limits or hours allowed for provider
- As requested by provider to allow for billing corrections

6) The **Service Delivered Results** page will display confirming the actions taken.

Service Delivered Results												
SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
5****9	xyz0000a	First Last	PSW Name	SE151/OR507/NA	8/24/2016	04:00 PM	08:00 AM	1.000	\$175.00	\$175.00	Approved	
5****9	xyz0000a	First Last	PSW Name	SE151/OR507/NA	8/25/2016	04:00 PM	08:00 AM	1.000	\$175.00	\$175.00	Approved	
5****0	xyz0000a	First Last	PSW Name	SE151/OR526/NA	8/28/2016	08:00 AM	06:00 PM	10.000	\$14.00	\$140.00	Approved	

TIP: Approved or Rejected SDs will no longer appear on the **Review Pending Service Delivered** page. Users can confirm the status of the SD by searching for it on the **View Service Delivered** page. Instructions on how to search for SD entries is included in the separate assistance guide: **How to Find-View Service Delivered Entries**.

Appendix A: Review Pending Service Delivered Search Criteria

The search fields are defined below.

- **Service Location/PSW Provider SPD Provider ID** = The SPD Provider ID Number for the Agency provider's service location or PSW authorized for the service.
- **Rendering/Agency eXPRS Provider ID** = The rendering Agency provider's eXPRS provider ID number.
- **Client Prime** = The prime number for a specific individual.
- **Begin Date** = A specific start date for when services were delivered.
- **End Date** = A specific end date for when services were delivered
- **Submitted From** = The first date that the SDs were submitted to pending from the Provider.
- **Submitted To** = The last date that the SDs were submitted to pending from the Provider.
- **Created From** = The first date that the SDs were first created by the Provider.
- **Created To** = The last date that the SDs were first created by the Provider.
- **Pay to Provider ID** = The eXPRS ID for the provider who will receive the payment.
 - For PSWs, the **Pay-To Provider** is Public Partnerships, LLC (eXPRS ID: 1571171).
- **Service Element** = The service element the services were authorized under.
- **Procedure Code** = The procedure code services were authorized under.
- **Svc Modifier Cd** = The modifier code used with the procedure code the service was authorized under.
- **Max Displayed** = Select an option from the dropdown menu, if desired.