

How to Authorize & Bill for Taxi services or Transit ride tickets/tokens in eXPRS Plan of Care (POC)

(updated 6/18/2018)

In many areas of the state, public mass transportation services are very limited or unavailable. This necessitates the utilization of Taxi services for an individual's non-medical, community transportation needs for some individuals. Those taxi services can currently be authorized in eXPRS Plan of Care under the below procedure codes utilizing the "generic" provider.

- **OR003**-Transportation Commercial Provider (not avail under SE257)
- **OR554**-Transportation Transit Pass

This assistance guide will outline steps for Case Management Entities (CMEs) to successfully authorize and then submit billings for taxi services or transit ride tickets/tokens in eXPRS/POC in alignment with ODDS transportation services policy.

→ ***Please note:*** both procedures codes **OR003** & **OR554** are authorized using the "generic" provider option, meaning the services are billed by & paid to the authorizing CME, who then forwards payment to the appropriate transportation vendor.

Users must have the applicable **POC Manager** role for their CME organization to do this authorization work.

To authorize Taxi services or Transit tickets/tokens in POC:

1. Login in to eXPRS. If users have more than one organization login option, they will need to be logged in under the **Local Authority** (for CDDPs shown below)

Login

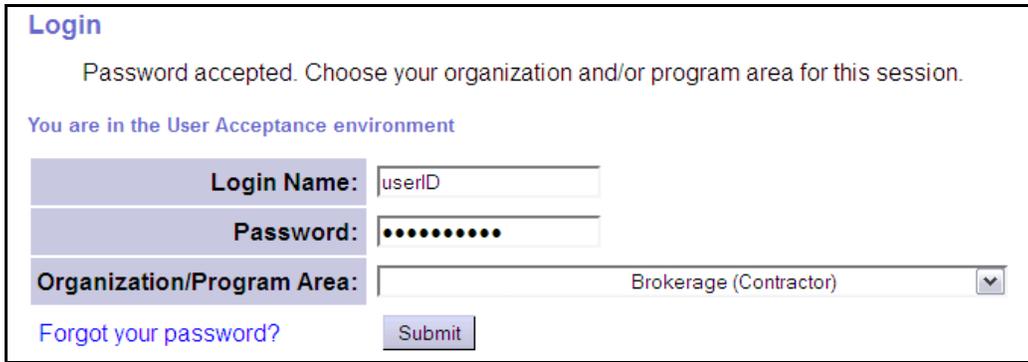
Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

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?](#)

or **Contractor** (for Brokerages) Organization role.



Login

Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

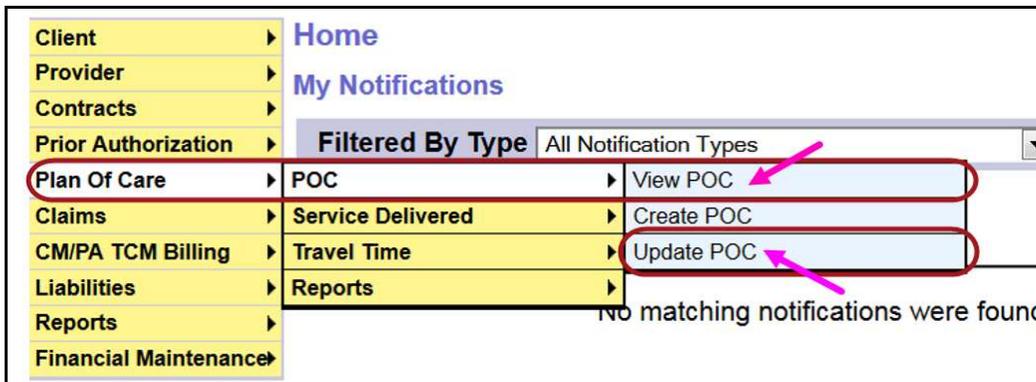
Login Name:

Password:

Organization/Program Area:

[Forgot your password?](#)

- From the left-hand yellow navigational menu click on **Plan of Care** → **POC** → **View POC** or **Update POC** to find the POC that needs to have authorizations added.



Client ▶ Home

Provider ▶ My Notifications

Contracts ▶

Prior Authorization ▶ Filtered By Type All Notification Types

Plan Of Care ▶ POC ▶ View POC

Claims ▶ Service Delivered ▶ Create POC

CM/PA TCM Billing ▶ Travel Time ▶ Update POC

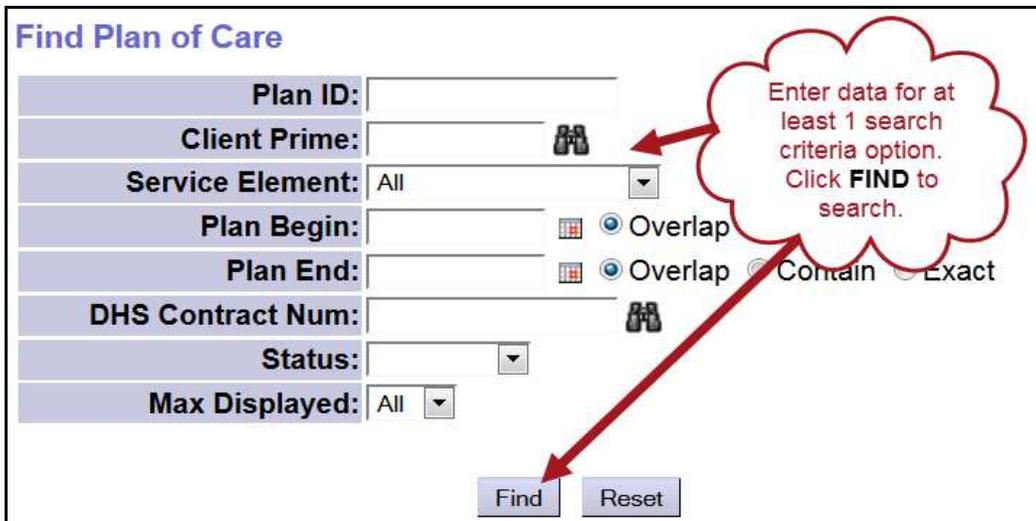
Liabilities ▶ Reports

Reports ▶ No matching notifications were found

Financial Maintenance ▶

→ **PLEASE NOTE:** To create a new Plan of Care, please see the assistance guide [How to Create a Plan of Care](#) on the eXPRS Help Menu.

- In the **Find Plan of Care** page, search for the POC that the authorization is to be added. At least one search criteria option must be entered.



Find Plan of Care

Plan ID:

Client Prime:

Service Element: All

Plan Begin: Overlap

Plan End: Overlap Contain Exact

DHS Contract Num:

Status:

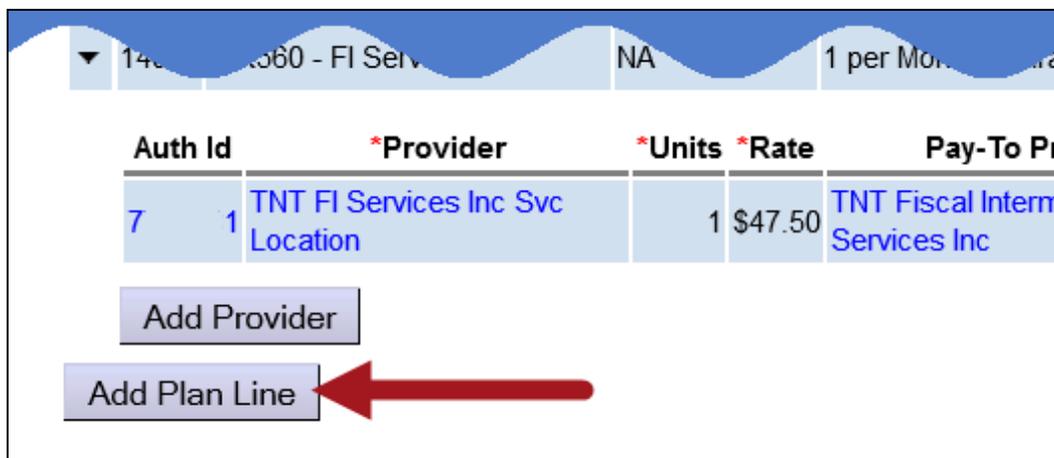
Max Displayed: All

Enter data for at least 1 search criteria option. Click **FIND** to search.

- From the search results, open the POC for which transportation authorizations are needed. Click **Edit** at the bottom of the POC, if needed, to open the POC fields for editing.



- Click **Add Plan Line** at the bottom of the POC to add the new authorization.



- For Taxi services or Transit tickets/tokens, use procedure code **OR003- Comm Transp, Commercial** or **OR554-Transprotation Transit Pass**. Proceed with building the plan line.

→ **Please keep in mind** that the **units** for these procedure codes is **EACH**, meaning for Taxi rides or Transit tickets/tokens, **EACH** is the number of providers who will have an expenditure amount billed for that service, per the frequency (eg: month).

For example: 1 unit = 1 monthly purchase of services from a vendor, such as a booklet of Taxi ride tickets, or a packet of ride tokens. It is **not** each taxi ride or each token.

- Per ODDS policy guidelines, the Plan Line should be built using the following guidelines:
 - Units** = the number of taxi or transit companies that could provide service to the individual in a given month.

- **Frequency** = Select “month” from the dropdown.
- Plan Line **Date Range** = can equal the POC date range.

Example shown below:

SE	Procedure	Modifier	Units	Dates
149	OR003 - Comm Transp, Commercial	NA	3.00 per Month	1/1/2016 - 12/31/2016

This is for 3 diff taxi/transit companies that will be potentially billed each month.

8. With the Plan Line in place, you can now add the “generic” provider SPAs under it. Each “generic” SPA should be for a different Tax to Transit company that the client will be utilizing. Be sure to add the name of the company in the notes field provided on each SPA.

- Each separate Taxi or Transit company SPA will get one (1) **UNIT** assigned. This will accommodate one (1) billing per month for each SPA/company for the total amount expended for that company’s service to the client in a month.

SE	Procedure	Modifier	Units	Dates				
149	OR003 - Comm Transp, Commercial	NA	3.00 per Month	1/1/2016 - 12/31/2016				
Auth Id	Provider	Units	Rate	Pay To Provider	Dates	Review?	Allocation	Status
8	1 {Generic} Around Town Taxi	1.00	\$50.00	Supp Svcs Brokerage /149	1/1/2016 - 12/31/2016	Yes	\$600.00	Accepted
8	2 {Generic} City Transit - Ride Tokens	1.00	\$75.00	Supp Svcs Brokerage /149	1/1/2016 - 12/31/2016	Yes	\$900.00	Accepted
8	3 {Generic} Urban Taxi Co	1.00	\$125.00	Supp Svcs Brokerage /149	1/1/2016 - 12/31/2016	Yes	\$1,500.00	Accepted

Each provider auth gets to bill once per month for the total amount expended in that month for the service.

- The **RATE** on each SPA would be the maximum total amount projected or anticipated to be possibly billed for a month of service from that company.

SE	Procedure	Modifier	Units	Dates				
149	OR003 - Comm Transp, Commercial	NA	3.00 per Month	1/1/2016 - 12/31/2016				
Auth Id	Provider	Units	Rate	Pay To Provider	Dates	Review?	Allocation	Status
8	1 {Generic} Around Town Taxi	1.00	\$50.00	Supp Svcs Brokerage /149	1/1/2016 - 12/31/2016	Yes	\$600.00	Accepted
8	2 {Generic} City Transit - Ride Tokens	1.00	\$75.00	Supp Svcs Brokerage /149	1/1/2016 - 12/31/2016	Yes	\$900.00	Accepted
8	3 {Generic} Urban Taxi Co	1.00	\$125.00	Supp Svcs Brokerage /149	1/1/2016 - 12/31/2016	Yes	\$1,500.00	Accepted

The rate is the maximum total amount anticipated or projected to be potentially billed each month for that company’s services to the client.

9. Submit the “generic” SPA(s) to have them process through system validation edits and move them to **accepted** status.

To bill for Taxi services or Transit tickets/tokens in POC:

1. Users must have the applicable **POC Claims Manager** role to do this SD billing work.
2. Login in to eXPRS. If users have more than one organization login option, they will need to be logged in under the **Local Authority** (for CDDPs shown below)

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

Login Name:

Password:

Organization/Program Area:

[Forgot your password?](#)

or **Contractor** (for Brokerages) Organization role.

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

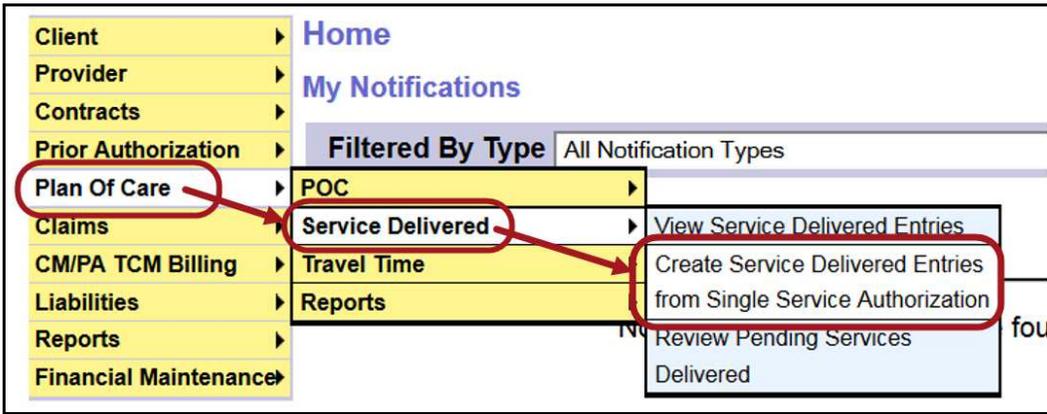
Login Name:

Password:

Organization/Program Area:

[Forgot your password?](#)

3. From the left-hand yellow navigational menu click on **Plan of Care → Service Delivered → Create Service Delivered from Single Service Authorization** to find the transportation authorization to be billed against.



4. In the **Create Service Delivered Entries from Single Service Authorization** page, use the criteria fields to search for the transportation authorization to bill against.

→ **Pro Tip:** Search using:

- **Client Prime** = the client's prime number
- **Procedure Code** = OR003 or OR554, whichever is used for the individual's service.

Create Service Delivered Entries from Single Service Authorization

Client Prime: <prime #>

Service Location/PSW SPD Provider ID:

Rendering/Agency eXPRS Provider ID:

DHS Contract Num:

Service Element:

Procedure Code: OR003 - Comm Transp, Commercial

Svc Modifier Cd:

Effective Date: 1/1/2016

End Date: 4/30/2016

Find Reset Print

All "generic" SPAs will be listed together, and will just show the text Info added from the 1st "generic" SPA created.

SPA#	Proc Code	Modifier	Units	Unit	Frequency	Rate	Begin	End
8283001	OR003 - Comm Transp, Commercial	NA - Not Applicable	1.00	Each	Month	\$50.00	1/1/2016	12/31/2016
8283003	OR003 - Comm Transp, Commercial	NA - Not Applicable	1.00	Each	Month	\$125.00	1/1/2016	12/31/2016
8283002	OR003 - Comm Transp, Commercial	NA - Not Applicable	1.00	Each	Month	\$75.00	1/1/2016	12/31/2016

Look closely at the blue SPA# & be sure to choose the correct SPA to bill against.

5. **IMPORTANT:** If using multiple, different vendors, be sure to look at the blue SPA# closely so you are selecting the correct SPA for the tax or transit company you are billing. **All “generic” SPAs will be listed together, and will just show the text information added to the first “generic” SPA created.**

- Click on the \$ icon for the SPA listed to create/submit needed billings.

6. In the **Service Delivered by Service Authorization** page, enter the billing information for the month’s services provided by that authorized Tax or Transit company. The data elements needed for the SD per ODDS Policy are:

- **Date** = the last day of the month being billed
- **Actual Rate** = the total summed amount from the invoice received by the company for all the taxi rides in that month, or a group of transit tickets/tokens purchased. It is not a single taxi ride, single ticket or token.
- **Total Items** = the number of summed/totalled invoices being billed for the company for the month. This should always be one (1) = one summed, monthly total.

Examples shown below.

- **Rides from a taxi company:**

Service Delivered by Service Authorization
Update an existing or add a new Date Time Entry Line

Provider: {Generic} Around Town Taxi	Dates: 1/1/2016 - 12/31/2016
Client Name: <client first last name>	Client Prime: <prime #>
CM Organization: <authorizing CDDP or Brokerage>	/Case Mgmt Prv
Service: SE149/OR003 - Comm Transp, Commercial/NA - Not Applicable	
Rate: \$50.00	Review Req: Yes
Units: 1 per Month	<input type="button" value="Print"/>

Select	Date	Actual Rate	Total Items	Total Amount	Status
<input type="checkbox"/>	1/31/2016	\$47.26	1	0	Draft
				\$0.00	

For items checked above

The last day of the month being billed.

The total summed amount being billed by this company for all taxi rides in the month.
Not an individual ride.

The number of billing events for the month.

- Group of Transit tickets or tokens:

Service Delivered By Service Authorization

Update an existing or add a new Date Time Entry Line

Provider: {Generic} City Transit - Ride Tokens	Dates: 1/1/2016 - 12/31/2016
Client Name: <client first last name>	Client Prime: <prime #>
CM Organization: <authorizing CDDP or Brokerage> /Case Mgmt Prv	
Service: SE149/OR003 - Comm Transp, Commercial/NA - Not Applicable	
Rate: \$75.00	Review Req: Yes
Units: 1 per Month	Print

Select	Date	Actual Rate	Total Items	Total Amount	Status
<input type="checkbox"/>	1/31/2016	\$70.00	1	\$0.00	Draft
				0	\$0.00

Buttons: Save All, Cancel Changes, Delete

For items checked above:

- The last day of the month being billed.
- The total summed amount being billed by this company for a group of tickets/tokens purchased at one time for the month. Not individual tickets or tokens.
- The number of billing events for the month.

- Submit any **draft** SD billing entries created. The system will then aggregate the billings and generate claims for payment back to the authorizing entity to forward on to the individual taxi/transit company or vendor.
- If the client is utilizing multiple taxi or transit companies authorized under a procedure code, the system will accommodate single billings against each respective company's "**generic**" SPA on the same date, if needed.

SPA ID	Auth Status	Client Prime	Client Name	Provider	SE	Proc	Mod	Service Date	Begin Time	End Time	Group Setting	Service Hours/Units	Billed Units	Total Direct Support Time	Rate	Amount	SD ID	SD Status	Claim ICN	
85	03	Accepted	<prime #>	<First Last>	{Generic} <Taxi #1>	149	OR003	NA	02/28/2016	12:00 AM	12:00 AM	No	1	1	NA	\$38.26	\$38.26	85	03	Approved
85	04	Accepted	<prime #>	<First Last>	{Generic} <Taxi #2>	149	OR003	NA	02/28/2016	12:00 AM	12:00 AM	No	1	1	NA	\$127.50	\$127.50	85	04	Approved

- Once the SDs billed are aggregated into claims, they will be paid back to the authorizing CME, who then forwards the payment to the appropriate transportation vendor.