

How to Review PENDING Service Delivered Entries

CDDPs and Brokerages

(updated 9/24/2018)

eXPRS/Plan of Care (POC) has a feature within the service authorization process that determines if **SERVICE DELIVERED** (SD) billing entries submitted by a provider will pend for review by the authorizing Case Management Entity (CME) (eg: a CDDP, Brokerage or CIIS) **BEFORE** they are aggregated into claims for payment.

If the setting on the **“Review?”** on the provider’s SPA is set to **YES** (checked), then any SD billing entries for that authorization will **PEND** for CME review & acceptance or rejection prior to the billing being released for payment.

If the setting on the **“Review?”** on the provider’s SPA is set to **NO** (not checked), then any SD billing entries submitted by the provider will process through system validations & potentially move to **approved** status **without CME review**.

The system default settings for **“Review?”** are listed below:

For Services authorized by a CDDP:

- **Personal Support Worker (PSW)** – default setting is set to **YES = Review**
- **Behavior Consultants** – default setting is set to **YES = Review**
- **DD Agency Providers** - default setting is set to **NO = Not Review**.

For services authorized by a Brokerage:

- **Personal Support Worker (PSW)** – default setting is set to **YES = Review**
- **Behavior Consultants** – default setting is set to **YES = Review**
- **DD Agency Providers** - default setting is set to **YES = Review**.

For Services authorized by CIIS:

- **Personal Support Worker (PSW)** – default setting is set to **YES = Review**
- **Behavior Consultants** – default setting is set to **YES = Review**
- **DD Agency Providers** - default setting is set to **YES = Review**.

These system default settings can be changed by the CME users, if needed, when setting up the service prior authorization while it is still in **draft** status. Please see the instructions and details on how to change this **“Review?”** setting in the assistance guide: [**How to Change the Review Service Delivery Entry Setting**](#).

To Review PENDING SERVICE DELIVERED (SD) entries submitted by providers:

1. Login to eXPRS. Users will need to select either the Local Authority (*for CDDPs*) or Contractor (*for Brokerages*) for their **Organization/Program Area** option when logging in to do this work.

CDDPs:

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?](#)

Brokerages:

Login

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

You are in the User Acceptance environment

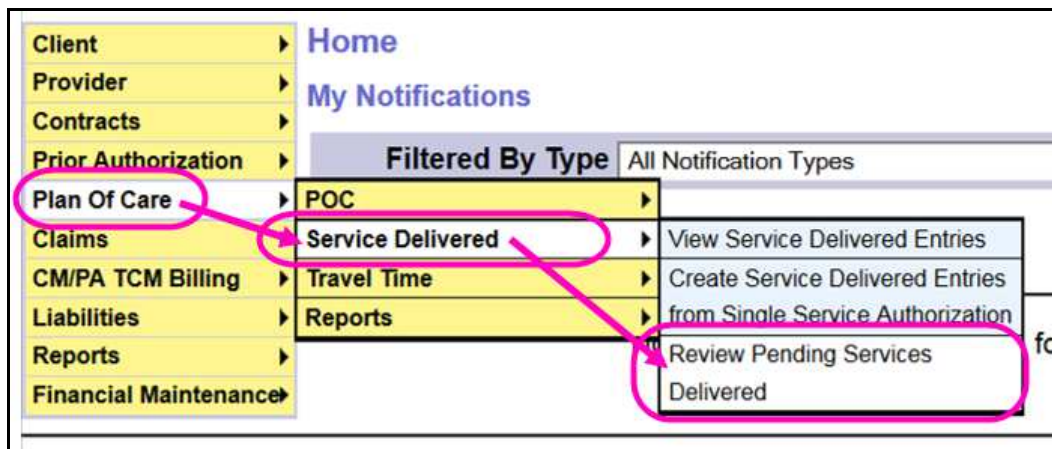
Login Name:

Password:

Organization/Program Area:

[Forgot your password?](#)

2. From the left-hand, yellow navigational menu, click on **Plan of Care → Service Delivered → Review Pending Services Delivered**.



- Now in the **Review Pending Service Delivered** page, users can search for any pending SD entries submitted by providers.
 - Enter the search criteria desired to search for **pending** SDs to review, then click **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 **Close** **Reset**

New search criteria options.

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

The search fields are defined below. **New search fields added as of Oct 2018:**

- Service Location/PSW Provider SPD Provider ID** = the SPD provider ID number for the Agency provider's service location or PSW provider 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 SD billings were submitted to pending from the Provider.
- Submitted To** = the last date that the SD billings were submitted to pending from the Provider.
- Created From** = the first date that the SD billings were first created by the Provider.
- Created To** = the last date that the SD billings were first created by the Provider.

- **Pay to Provider ID** = the eXPRS ID for the provider who will receive the eXPRS payment processed. For PSWs providers, the **Pay To Provider** is **Public Partnerships, LLC** (eXPRS ID: **1571171**).
- **Service Element** = the specific service element the services were authorized under.
- **Procedure Code** = the specific procedure code services were authorized under.
- **Svc Modifier Cd** = the modifier code (if any) used with the procedure code the service was authorized under.
- **Max Displayed** = select an option from the dropdown menu, if desired.

4. From the list results returned, place a check in the box next to the **SERVICE DELIVERED** (SD) entry(ies) you have reviewed, and then take an action on those SD entries, using one of the buttons at the bottom of the page.

All	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

Buttons: Close, Reset, Approve, Reject

Actions available:

- **Close** = closes the current page
- **Reset** = clears the results list and resets the search criteria fields to blank for a new search
- **Approve** = approves the selected (checked) SD entries for claims aggregation processing and payment
- **Reject** = rejects the selected (checked) SD entries; you must select a reject reason from the dropdown menu first. The reject reason selected will apply to all SD entries checked & rejected in that action.

5. If the action being taken is to **reject** an SD entry, please select a reason the entry has been rejected from the **Reject Reason** dropdown menu. This reason will then be displayed on all SD entries rejected in that action.

Reject Reason:		
<input type="checkbox"/>	All	None
<input type="checkbox"/>	ID	None
<input type="checkbox"/>	SPA ID	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

The reject reasons available in the dropdown are:

- *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. Repeat steps #4 & #5 for any additional SDs that need approved or rejected. Select a different "reject" reason from the dropdown menu that will apply other SD entries being rejected, as needed.

7. Once an action is taken on a pending SD entry (either accepted or rejected) users will be taken to a confirmation page when the action is completed.

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	

Those SDs will be removed from the “pending” cue and no longer viewed on the [Review Pending Service Delivered](#) page.

8. Users can also confirm the status of the SD entry based on the action taken by searching for the SD entry 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](#).