

Overview of the Service Delivered Billing Entry (SD) Batch Import Process and CSV Spreadsheet

The **SD Batch Import Process** is specifically for Agency Providers only. It allows them to upload a CSV spreadsheet into eXPRS to create large amounts of SDs at one time.

Key Facts about the Process

- The import process works for hourly services, residential services, and mileage services only. Event or Outcome-based services cannot be imported and must be entered manually.
- The import process uses a specially formatted CSV file to create Draft SDs. Once imported, a user with the **Provider Agency Claims Manager** role can submit the SDs.
- Providers must prepare this CSV file from their own internal time system, and it must conform to the specific format found in this guide. This may involve making modifications to an internal IT system.
- Providers are responsible for obtaining all the information needed from existing pages & screens in eXPRS, and for performing any necessary data mapping from information in their own data systems to these identifiers.
- Providers are responsible for the creation of any necessary data identifier conversion tables or utilities, and for the accuracy of any such mechanisms.

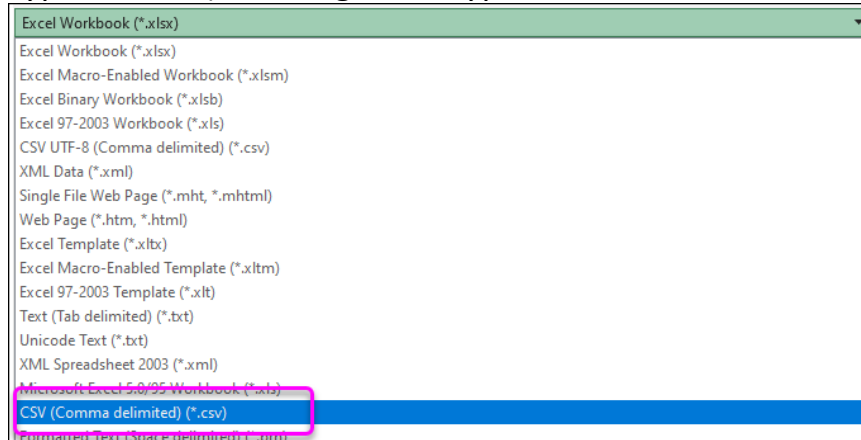
Next Steps to Begin Using the Process

- 1) Review the specific formatting details in this document that your internal systems will need to produce a CSV file for importing SDs to eXPRS.
- 2) Complete a User Enrollment Form for your staff member who will be using the import process to allow them access to the function.
- 3) Send an email with the subject: “**SD Import Process**” to [Info.eXPRS](#) to test that your CSV file successfully imports into eXPRS.
- 4) Once that user successfully uploads a CSV file in the eXPRS Practice environment¹, they will receive the **Provider Agency SD Importer** role.

¹ See the following guides for more information: **Agency SD Import – How to Upload CSV File & Agency SD Import – Error Management**

Appendix A: CSV File Requirements

- 1) The file must be saved as a simple **CSV (Comma delimited) (* CSV)** file. Any other file type will fail (including other types of files such as **CSV UTF-8**)



- 2) Each import file may contain up to 20,000 records.
- 3) The import file **must not** contain a row for column headings.
- 4) Each row must be formatted EXACTLY as shown in **Appendix B** below. This is necessary to create the SD under the correct Service Prior Authorization (SPA).

Spreadsheet General Layout

Columns A-F	Required for all rows and must not be left blank.
Columns G-H	Required for all hourly services. For Residential or Mileage services, these fields must be blank.
Column I	Required for rows with the following PROC/MOD codes: OR401 RC, W5, W6, W4, S1 and WV. For all other services, this field must be blank (including NO spaces).
Column J-N:	Required for all Electronic Visit Verification (EVV) Services. For Non-EVV Services, these fields must be blank.
Column O:	Required for Daily Residential Services (SE50, 142 & 152). For all other services, this field must be blank.
Column P:	Required for Mileage Services (OR004 & OR005 WD/WE). For all other services, this field must be blank

If these guidelines are not followed, errors will occur and the file will not upload. You will then be able to download a version of the file which shows the errors so you can correct the issue and attempt the import again.

Appendix B: Specific CSV Column Formatting

The CSV file must match the data elements below in the following sequence, with no header row and no spaces. Steps to obtain the information for Columns A-E can be found in the document: **Agency SD Import – How to Find the Service Information for Service Delivered (SD) Batch Import Files.**

Column	Data Element	Description	Format
A	Provider Service Location ID	eXPRS unique identifier for provider's service location	5+ digit integer <i>ex: 12345</i>
B	Service Element	First of three parts of unique identifier for a service	2- or 3-digit integer <i>ex: 49 or 149</i>
C	Procedure Code	Second of three parts of unique identifier for a service.	5 characters ² <i>ex: OR501</i>
D	Service Modifier Code	Third of three parts of unique identifier for a service.	2 characters ² <i>ex: NA, W1</i>
E	Client Prime	DHS unique identifier for client.	8 characters ² <i>ex: AA22222A</i>
F	Service Date	The date of service	mm/dd/yyyy <i>ex: 01/13/2015</i>
G	Start time	The start time of service, exact minute.	h:mm AM or PM ² <i>ex: 1:37 PM</i>
H	End time	The end time of service, exact minute.	h:mm AM or PM ² <i>ex: 4:53 PM</i>

² Letters must all be upper case.

I	Direct support hours	Amount of time of direct client interaction for the service for OR401/RC, W4, W5, W6, S1 and WV only. Otherwise, column must be blank. Cannot exceed the total service time billed.	Whole numbers ex: "20" = 20 minutes or Time as hh:mm . ex: 03:35
J	Begin Location Latitude	The latitude at the start of the service.	Numeric Decimal ³ ex: 42.12345678*
K	Begin Location Longitude	The longitude at the start of the service.	Numeric Decimal ³ ex: 122.12345678
L	End Location Latitude	The latitude at the end of the service.	Numeric Decimal ³ ex: 42.12345678
M	End Location Longitude	The longitude at the end of the service.	Numeric Decimal ³ ex: 122.12345678
N	Direct Support Professional	The first and last name of the DSP for the service. Accepted characters include letters, spaces, dashes (-), periods (.) and apostrophes (').	Alpha, 30-character limit ex: John Smith
O	SD Modifier Reason	The Modifier Code for the SD. For Daily Residential Services only (ORAGH/NA, ORCGH/NA, ORCHH/NA). Otherwise column must be blank.	3 characters ⁴ ex: AWL, FAM, MED
P	Total Miles	The total number of miles billed for that day. For mileage services only (OR004 WD/WE and OR005 WD/WE). Otherwise column must be blank. Characters limited to a max of 1 place past the decimal.	Numeric Decimal ex: 15.2

³ Characters limited to a max of 8 places past the decimal.

⁴ Letters must all be upper case.

Appendix C: Examples of all Types of Services on a Single Spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	12345	49	OR542	W1	NOP6543C	3/20/2023	1:00 PM	4:00 PM								
2	23456	49	OR542	W1	NOP6543C	3/21/2023	1:00 PM	4:00 PM								
3	34567	54	OR401	W6	NOP6543C	3/21/2023	1:00 PM	4:00 PM	180							
4	45678	54	OR401	W6	NOP6543C	3/21/2023	1:00 PM	4:00 PM	180							
5	56789	149	OR526	NA	HIJ7890D	3/20/2023	10:00 AM	2:00 PM		36.12345	34.12347	36.12345	12.32154	Sam Smith		
6	67890	149	OR526	NA	HIJ7890D	3/21/2023	10:00 AM	2:00 PM		36.12345	34.12347	36.12345	12.32154	Sam Smith		
7	78901	50	ORAGH	NA	XYZ9876B	3/20/2023									AWL	
8	89012	50	ORAGH	NA	XYZ9876B	3/26/2023									REG	
9	90123	257	OR005	WD	ABC1234A	3/20/2023										11.1
10	10123	257	OR005	WD	ABC1234A	3/21/2023										26

Non-EVV Hourly Services

EVV Hourly Services

Daily Residential Service

Mileage Service

Appendix D: Testing your .CSV File in the Practice Environment

Before receiving the **Agency SD Importer** role in eXPRS, you will need to complete the User Enrollment Form and check the appropriate box on the form. After ODDS receives the form, you will be emailed further instructions to follow. We ask that all communication around your testing be directed to info.exprs@odhsoha.oregon.gov.

To test your .CSV file, you will be asked to upload it into the eXPRS Practice environment. There are three reasons for this:

- 1) **Import file creation** – It ensures you have a reliable process for creating the required .CSV file
- 2) **Error message recognition** – It allows you to see and troubleshoot error messages within a rejected file
- 3) **Successful Import** – It ensures you are able to successfully upload a .CSV import file on a consistent basis.

In the Practice environment, individual client names are scrambled for privacy. However, the Prime numbers will be the same, and you will be able to use the individuals' Prime to verify the SDs that are uploaded. Here are a few additional tips when doing your testing:

- 1) **Error Messages on Rejected .CSV Files** – A normal outcome of testing your .CSV file is receiving a rejection and error message. Take time to review and understand the error messages you receive. You can troubleshoot them using the

Help Guide: **Agency SD Import – Error Management**. Email Info.eXPRS@odhsoha.oregon.gov if you are unable to understand or resolve an issue, or if you believe you are receiving an invalid message.

- You can also intentionally change data in your .CSV file to create specific errors. This is not required, but can help you become familiar with the error messages.
- 2) **Submit Draft SDs** – The SD Import process creates SDs, but it does not submit them. During your test, it is best practice to also submit the imported SDs. However, depending on your test data, you may find some SDs will suspend or deny for various reasons.
 - 3) **Notify ODDS After a Successful Import** – When you successfully import a file and completed your testing, please notify us. We will then add the required role for you in eXPRS.