How to Take Action on a Batch of Service Delivered Billing Entries (SDs)

Users can search for and take action on a batch of Draft SDs at a single time. This is very useful when submitting many SDs at once, such as those uploaded using the Agency SD Batch Import Process. Users can also follow the steps below to take other actions on SDs depending on their status. For example, **Approved** or **Pending** SDs can be voided. See the applicable guide for instructions on how to accomplish this.

Please note that if there are any EVV SDs that need corrections or edits, it is best practice to do that before submitting them.[1]

To take these steps, a user needs the **Claims Manager** role for their user group:

How to Submit a Batch of Draft SD Billings:

1) Log in to **eXPRS** and select **Plan of Care > Service Delivered > View Service Delivered Entries**.
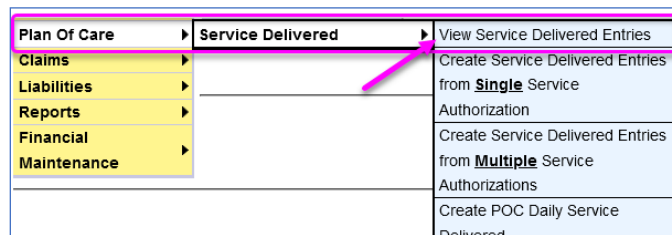
2) On the **View Service Delivered** page, select a **Status**[2] of **Draft** and enter any other search criteria. Then select **Find**.

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[1] See the guide: **How to Correct an EVV Shift – Agency Provider** for more information.
[2] Selecting a **Status** is required to enable batch submission.

TIP: Any of the criteria can be entered to narrow the result list to just the SDs you want. However, some key criteria to search by are:

- **Status:** Limits results to SDs with the selected status.
- **Begin Date:** Limits results to SDs that began on this date or later.
- **End Date**: Limits results to SDs that end on this date or earlier.
- **Create From:** Limits results to SDs that were created on this date or later.[3]
- **Create To:** Limits results to SDs that were created on this date or earlier.[3]
- **Client Prime:** Limits results to SDs for a specific individual.
- **Procedure Code**: Limits results to SDs for a specific service.

View Service Delivered

Enter one or more search criteria. Criteria are cumulative. Results returned are limited to 5,000 rows.

Note: If criteria entered results in more than 5,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

Client Prime:	ABC0000Z	
Service Location/PSW SPD Provider ID:		
Rendering/Agency eXPRS Provider ID:		Pay To Provider:
DHS Contract Num:		
Service Prior Auth#:		
Service Delivered ID:		
Service Element:		
Procedure Code:	OR526 - Attendant Care, home or comm	
Svc Modifier Cd:		
SD Modifier Reason:		
Show EVV:	☐	
Show Group Only:	☐	
Show Auth Status:	☐	Show Reviewed Date: ☐
Claim ICN:		
Status:	Draft	
Show Aggregated(into claim):	⦿ Both ○ Aggregated ○ Not Aggregated	
Begin Date:	12/1/2022	End Date: 12/31/2022
Submitted From:		Submitted To:
Created From:		Created To:
Reviewed From:		Reviewed To:
Suspense Location:	Select...	
Exception Code:		
Max Displayed:	25	

3) From the Result List, select the checkbox(es) for the SDs to be submitted, then click **Submit**.

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[3] Useful when looking for SDs uploaded using the Agency SD Batch Import Process.

4) When the submission completes, users will be taken to a confirmation page.

Service Delivered Results

SPA ID	Client Prime	Client Name	Provider	Service	Service Date	Begin Time	End Time	Units	Rate	Amount	Status	Notes
#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/2/2020	08:45 AM	03:30 PM	6:45	$27.28	$184.14	Approved	
#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/3/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	
#####	xyz0000a	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/6/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	
#####	abc9999x	SZBTUBW LMDODWL	Agency Provider	SE49/OR526/NA	1/7/2020	08:45 AM	03:30 PM	6:45	$27.28	$184.14	Approved	
#####	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/8/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	
#####	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/9/2020	08:45 AM	03:30 PM	6:45	$27.28	$184.14	Approved	
#####	abc9999x	DWUCBOZ EDSBSZE	Agency Provider	SE49/OR526/NA	1/10/2020	09:00 AM	03:30 PM	6:30	$27.28	$177.32	Approved	

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TIP: A large number of SDs submitted at one time may longer to process. Waiting for the confirmation page to return is not necessary. A user can submit SDs and then search for the results by using the **Submit To** & **Submit From** dates in the search criteria.

To troubleshoot SDs that do not move to **Approved** status, providers can use the **Service Delivered (SD) Problem Solving Matrix** on the eXPRS Help Menu.