

How to Authorize & Bill for Taxi or Transit Ride Tickets/Passes

In many areas, mass transit services are limited or unavailable, so some individuals may use Taxi services for non-medical, community transportation. This guide outlines how Case Management Entities (CMEs) can authorize and bill for Taxi Services & Transit Ride Tickets/Passes in the Plan of Care using these procedure codes:

- **OR003**-Transportation Commercial Provider
- **OR554**-Transportation Transit Pass

These codes utilize a **Generic** provider, meaning the services are billed by the authorizing CME, who then receives and forwards the payment to the appropriate vendor.

Users must have the **POC Manager** role to do this authorization work.

To Authorize Taxi Services or Transit Tickets/Passes:

- 1) Log in to eXPRS under either the **Local Authority** (for CDDPs) or **Contractor** (for Brokerages) role.

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?](#)

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="Brokerage (Contractor)"/> ▼

[Forgot your password?](#)

2) Select **Plan of Care > Plan of Care**.

The screenshot shows a navigation menu on the left with items: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, CM/PA TCM Billing, Liabilities, Reports, and Financial Maintenance. The 'Plan Of Care' item is expanded, showing a dropdown menu with 'Plan Of Care', 'Service Delivered', 'Travel Time', and 'Reports'. A pink box highlights the 'Plan Of Care' option in the dropdown, and a pink arrow points to it from the top right. To the right of the menu is a 'Filtered By Type' section with a dropdown set to 'All Notification Types' and a 'Find' button. Below the menu, the text 'matching notifications' is partially visible.

TIP: If needed, see [How to Create a Plan of Care](#) for help creating a POC.

3) On the **Find Plan of Care** page, enter at least one criterion and select **Find**.

The screenshot shows the 'Find Plan of Care' search form. It includes a note: 'Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.' The form fields are: Plan ID (empty), Client Prime (filled with 'ABC0000Z'), Service Element (dropdown set to 'All'), Plan Begin (empty), Plan End (empty), DHS Contract Num (empty), Status (dropdown), and Max Displayed (dropdown set to '25'). There are 'Find' and 'Reset' buttons at the bottom. A pink box highlights the 'Client Prime' field, and another pink box highlights the 'Find' button.

4) From the results list, select the **Plan ID** Hyperlink to open the POC.

The screenshot shows the search results page. It includes the same search form as above. Below the form is a table with one row of results. A pink arrow points to the 'Plan ID' column header, and another pink arrow points to the value '53280276' in the first row. The table has columns: Plan ID, Client Prime, Client Name, DHS Contract Num, Plan Begin, Plan End, and Status. The first row contains: 53280276, YV, SABHCD SXSEA, 157815, 07/01/2022, 10/31/2022, Accepted. Above the table are navigation links: [First/Prev] 1, 2, 3 [Next/Last] and export options: CSV, Excel, PDF, RTF.

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
53280276	YV	SABHCD SXSEA	157815	07/01/2022	10/31/2022	Accepted

5) Select Navigate to the **Transportation** Tab and select **Edit**.

The screenshot shows the 'Plan of Care' interface. At the top, there are fields for Plan Id (53280276), Client Name (CQLXMN CHCOQ), Plan Status (Accepted), Plan Dates (7/1/2022 - 10/31/2022), and Client Prime (YV301E6V). Below these are buttons for 'Edit', 'Copy', and 'Print Summary'. At the bottom, there is a horizontal menu of tabs: Service Eligibility, Plan Overview, In Home Services, Residential, Supported Living, Community, **Transportation**, Ancillary, and Legacy. The 'Transportation' tab is highlighted in black.

6) Select **Add Plan Line** to add the new authorization.

The screenshot shows the 'Plan of Care' interface with the 'Transportation' tab selected. Below the tabs, there is a 'Plan Details' section with a button labeled 'Add Plan Line' highlighted in pink. A 'Done' button is visible at the top right of the interface.

7) Select the appropriate **Service Element** for the individual's service setting.

The screenshot shows the 'Plan of Care' interface with the 'Transportation' tab selected. Below the tabs, there is a 'Plan Details' section with a form for adding a plan line. The form has columns for 'SE/Procedure Code/Modifier', '*Units', '*Dates', and 'Status'. The 'SE/Procedure Code/Modifier' dropdown is highlighted in pink. The status is set to 'Draft'. There are 'Save' and 'Cancel' buttons.

8) For Taxi Services, select **Procedure Code OR003 – Comm Transp, Commercial**.
For Transit Tickets/Passes, select **Procedure Code OR554 – Comm Transp, Transit pass**.

The screenshot shows the 'Plan of Care' interface with the 'Transportation' tab selected. Below the tabs, there is a 'Plan Details' section with a form for adding a plan line. The 'SE/Procedure Code/Modifier' dropdown is now set to 'OR003 - Comm Transp, Commercial' and is highlighted in pink. The status is set to 'Draft'. There are 'Save' and 'Cancel' buttons.

9) In the **Units** section's left field, enter the number of taxi/transit **companies** that *could* provide service to the individual in a month. Set the next drop down (frequency) to **Month**.

*SE/Procedure Code/Modifier	*Units	*Dates	Status
49 - In-Home Comprehensive Supports OR003 - Comm Transp. Commercial NA - Not Applicable	2 Each / Month		Draft

TIP: This step allows the CME to submit one (1) billing for each Transit/Taxi Company (provider) every month. The single billing is for all the rides provided (e.g. Multiple taxi rides or transit passes). Billing instructions appear below.

10) Enter the applicable service dates in the **Date Range** field and select **Save**.

*SE/Procedure Code/Modifier	*Units	*Dates	Status
49 - In-Home Comprehensive Supports OR003 - Comm Transp. Commercial NA - Not Applicable	2 Each / Month	8/1/2022 - 02/28/2023	Draft

11) With the Plan Line in place, select **Add Provider** and create one **Generic** provider SPA for each different Taxi or Transit company the individual will utilize.

12) In the **Units** field, enter 1 and select **Save**. This will allow one (1) billing per month for the total amount expended for that company's service to the individual in a month.

SE	Procedure Code	Modifier	Units	Dates	Status
49	OR003 - Comm Transp. Commercial	NA	2 per Month	8/1/2022 - 2/28/2023	Draft

*Provider	*Dates	*Units	*Rate
Generic Provider Generic Provider Name: TRANSIT PROVIDER ONE	8/1/2022 - 2/28/2023	1	NA

13) In the **Rate** field, enter the maximum amount anticipated to be billed for a month of service from that company and select **Save**.

SE	Procedure Code	Modifier	Units	Dates	Status
49	OR003 - Comm Transp. Commercial	NA	2 per Month	8/1/2022 - 2/28/2023	Draft

*Provider	*Dates	*Units	*Rate
Generic Provider Generic Provider Name: TRANSIT PROVIDER ONE	8/1/2022 - 2/28/2023	1.00	250.00

14) Select **Submit** for each SPA to move them to **Accepted** status.

SE	Procedure Code	Modifier	Units	Dates	Status	
49	OR003 - Comm Transp, Commercial	NA	2 per Month	8/1/2022 - 2/28/2023	Draft	Edit Delete
Auth Id	Provider	Dates	Units	Rate	Pay-To Provider	Review? Status
54494484	(Generic) TRANSIT PROVIDER ONE	8/1/2022 - 2/28/2023	1	250.00	CME ONE 49 Comp in Home Supp Services	No Draft Edit Submit Delete
Auth Id	Provider	Dates	Units	Rate	Pay-To Provider	Review? Status
54494485	(Generic) TRANSIT PROVIDER TWO	8/1/2022 - 2/28/2023	1	250.00	CME ONE 49 Comp in Home Supp Services	No Draft Edit Submit Delete

Once the SPAs are in **Accepted** status, billings can now be created. Users must have the applicable **POC Claims Manager** role to take the next steps.

To Bill for Taxi Services or Transit Tickets/Passes:

1) Select **Plan of Care > Service Delivered > Create Service Delivered from Single Service Authorization** to find the transportation authorization to be billed against.

The screenshot shows a navigation menu on the left with the following items: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, CM/PA TCM Billing, Liabilities, Reports, and Financial Maintenance. The 'Claims' menu is expanded to show 'Service Delivered', which is further expanded to show 'View Service Delivered Entries from Single Service Authorization'. A pink arrow points to this option. The main content area shows a search results page with a search bar and a list of results.

2) On the **Create Service Delivered Entries from Single Service Authorization** page, enter search criteria to find the authorization to bill against.

Create Service Delivered Entries from Single Service Authorization

How to use this page:

- Date range defaults to current month, but can be changed as needed.
- Use the below fields to select, enter or modify the search criteria as needed, then click Find to get a list of authorizations to bill against. The more criteria used, the more specific or narrow the results returned.
- If no results are found, use less criteria and search again.
- If still no results are found, authorizations returned are not in "accepted" status or are incorrect, please contact the CDDP or Brokerage who authorizes the services for your customers. They are responsible for entering and maintaining the authorizations.

For more instructions on entering Service Deliveries, please download and use this assistance guide: [How to Create Service Delivered Entries by PSW/C-PSW Provider](#).

Please consult your Service Agreements for specific authorized UNIT amount details.

Client Prime:

Service Location/PSW SPD Provider ID:

Rendering/Agency eXPRS Provider ID:

DHS Contract Num:

Service Element:

Procedure Code:

Svc Modifier Cd:

Effective Date:

End Date:

Exact: Yes No

Exact: Yes No

TIP: Try searching using the **Client Prime** & the **Procedure Code (OR003 or OR554)**.

- 3) From the result set, all the generic SPAs will be listed together, and the **Service Location/PSW** title field will show *only the text information added to the first SPA created*. **Carefully review the SPA# for the corresponding authorization matching the invoice you are processing**. Click the dollar sign (\$) icon for the SPA listed to create/submit billings.

Name	Service Location/PSW
LDYWBNC, CDNE FI	{Generic} TRANSIT PROVIDER ONE
SPA#	
54494484	OR003 - Comm Transp, Commercial NA - Not Applicable 250.00 1.00 Each Month 8/1/2022 2/28/2023
54494485	OR003 - Comm Transp, Commercial NA - Not Applicable 250.00 1.00 Each Month 8/1/2022 2/28/2023

TRANSIT PROVIDER ONE
TRANSIT PROVIDER TWO

- 4) On the **Service Delivered by Service Authorization** page, enter the following billing information for the month's services provided by the Taxi or Transit company:
- Date** = The last day of the month being billed. (e.g. 08/31/2022)
 - Actual Rate** = the total amount from the invoice received for all taxi rides or transit tickets/passes purchased that month.
 - Total Items** = Enter one (1). This is always a single billing for the total of all invoices from a company for the month.

Provider:	{Generic} TRANSIT PROVIDER ONE	Dates:	8/1/2022 - 2/28/2023
Client Name:	JKEL CKJHSEJ	Client Prime:	FI
CM Organization:	CME ONE Case Management Provider		
Service:	SE49/OR003 - Comm Transp, Commercial/NA - Not Applicable		
Rate:	\$250.00	Review Req:	No
Units:	1 per Month	SPA ID:	54494484
			Print

Select	Date	Actual Rate	Total Items	Total Amount	Status
<input type="checkbox"/>	08/31/2022	\$231.56	1	\$0.00	Draft

For items checked above

The last day of the month being billed

The total sum being billed by this company for ALL rides/transit tokens in a month. **Not an individual ride.**

Always one (1). It is a single billing for the total of all the invoices billed by a company for the month

7. Select **Save All** and then select **Submit** for any **draft** SD billing entries.

Select	Date	Actual Rate	Total Items	Total Amount	Status
<input checked="" type="checkbox"/>	08/31/2022	\$231.56	1	\$231.56	Draft
<input type="checkbox"/>					Draft
				1	\$231.56

For items checked above

TIP: If the individual is utilizing multiple taxi or transit companies authorized under a procedure code, the system can accommodate billings against each respective company's SPA on the same date, if needed.

Once the SD Billings are in **Accepted** status, they will be aggregated into claims for payment back to the authorizing CME. The CME can then forward the payment to the taxi/transit company or vendor.