Summary of EIM/ESM Decentralized UR/SDR Reference Guide

The UR/Service Delivery Reports (SDRs) is used to bill against Unit Rate contracts. The SDR contains a roster of clients, each with a calendar for each service delivered for the month. You can bill for more than one Core Service or Add-on Service on the same day by using the multiple calendar functionality in the SDR. Billing for clients is completed by filling out attendance information for each month.

When the information is complete, the provider authorizes and submits the SDR to EIM, where the service lines are validated, approved, and then paid.

When clients are served at multiple locations, providers may choose to have service information entered in the SDR at each location, instead of centrally. This increases efficiency when entering large SDRs. The release function is typically the responsibility of the service location, while authorization is typically the responsibility of the parent organization.

There are a few additional things to keep in mind:

1. If the SDR includes a header-level offset, it should be done at the parent organization before any clients are released.
2. A few measures are necessary to ensure that users don't accidentally lock each other out of client records.
    - When accessing the SDR, be careful to select the ***location name*** rather than ***all locations***.
    - Always select **[Unlock Enrollments]** before leaving an SDR.
3. The provider must devise a business process to clarify which user(s) will do the following:
    - Create the SDR
    - Enter header-level offsets (if applicable)
    - Enter the SDR reference number (if applicable)
    - Release the SDR
    - Authorize the SDR
4. You can sort the SDR by Client ID, Enrollment ID, Client Name, and Provider Location. If sorting by Provider Location and you do not see a client record, check the Provider Organization Parent level location. All new or updated interfaced client enrollment records come into EIM at the Parent level of the organization from the agency enrolling system, i.e. Meditech. To learn more about Manage Enrollment Locations functionality, review online course 159: Manage Enrollment Locations in PACE.

Functions can be controlled by security roles.

This reference guide provides users with the steps to successfully bill for UR/SDR contracts in EIM/ESM.

Note: This job aid has been updated to reflected EIM/ESM system enhancements that will become effective as of May 19, 2013.

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UR/SDR Monthly Billing Process

1. Create a new SDR.
2. Enter the following:
   - SDR reference number, if applicable
   - SDR mode, if applicable
   - Service delivery information
     - Core
     - Add-On, if applicable
   - Client or Header level offsets, if applicable
   - SDR notes, if applicable
   - Client forms, if applicable

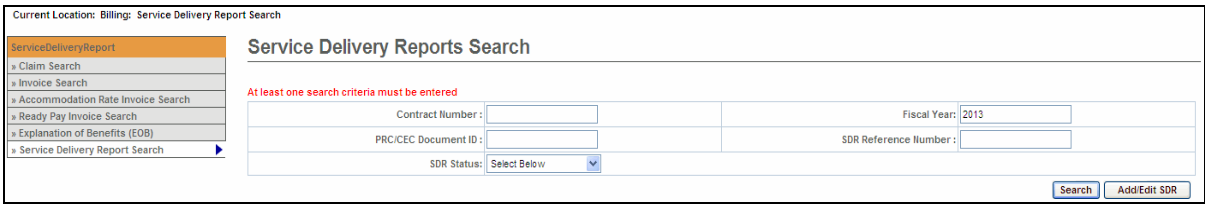
Important Reminder: After accessing the SDR, remember to unlock all enrollments before exiting.

3. Release the SDR.
4. Authorize the SDR.
5. Create a Supplemental if corrections to billing are needed.

Create an SDR

1. Select the [**Billing**] module.
2. Select [**Service Delivery Report Search**] from the navigation bar.

   *The **Service Delivery Report Search** page appears.*



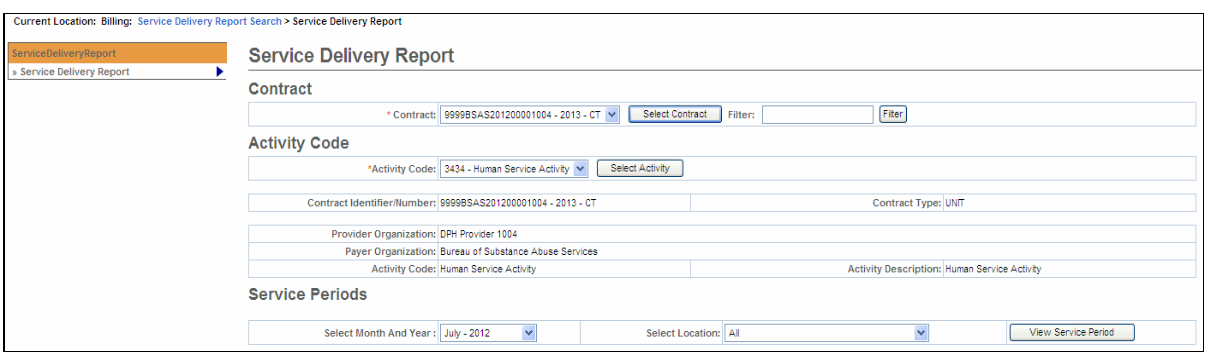
3. Select the [**Add/Edit SDR**] button.

   *The **Service Delivery Report** page appears.*

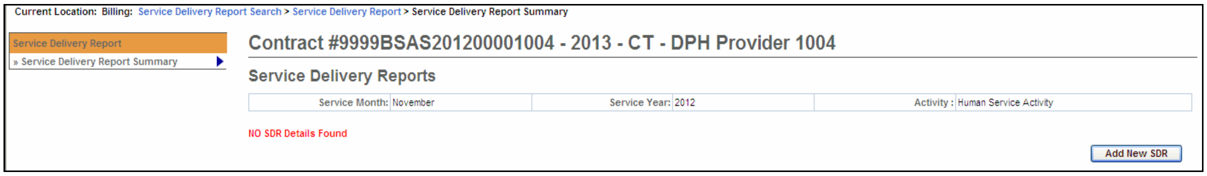
4. Select a contract from the drop down box; select the [**Select Contract**] button.

***Reminder**: If you manage a large number of contracts, you might find the Filter field helpful. It restricts the Contract listing to only those that meet your filter criteria. For example, you could enter "%DMH% in the Filter field and select the [**Filter**] button if you wanted to show only DMH contracts in the drop-down box.) You can also type in the contract number and select the filter button and it will only display the contract number you filtered on.*

5. Select an activity from the drop down box; select the [**Select Activity**] button.
6. Select the [**Select Month and Year**] from the Service Periods drop down box.
7. Select the [**Location**] from the Location drop down box.
8. Select the [**View Service Period**] button.



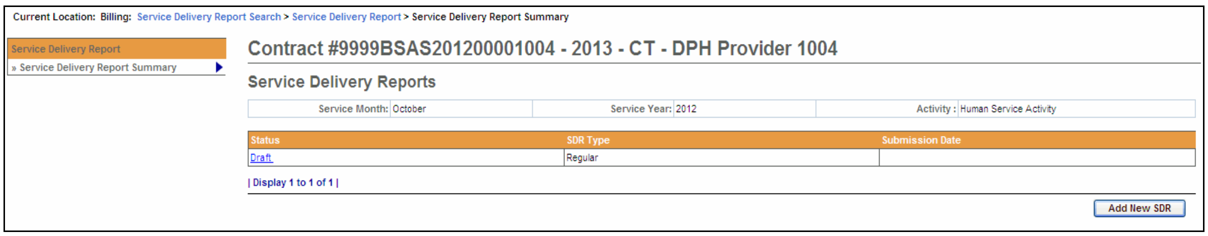
Note: An SDR for the current month cannot be created until all previous months on the contract are in Authorized status.



9. If you receive the message 'No SDR Details Found', select the **[Add New SDR]** button.

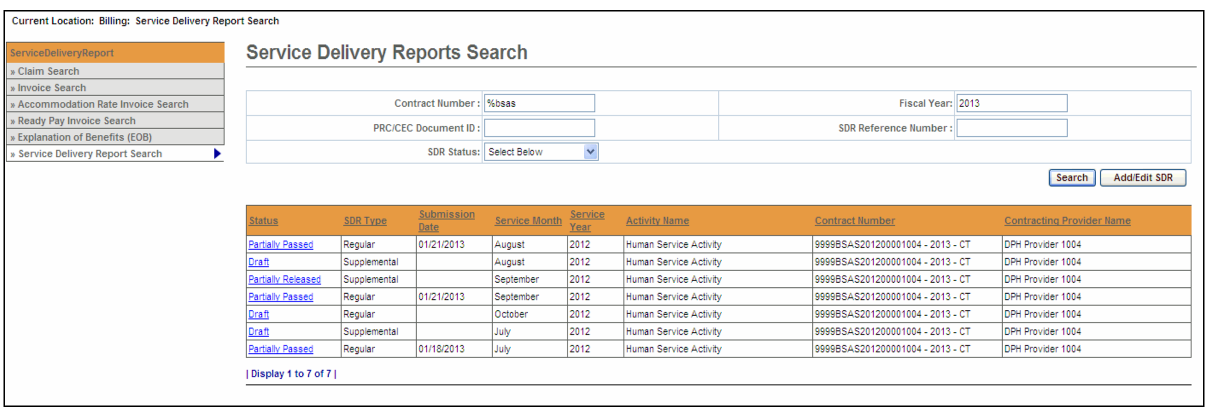
The page reappears with a Regular SDR Draft link.

10. To begin billing on the SDR, select the [**Draft**] link.



Access an Existing SDR

1. Access the **Service Delivery Report Search** page.
2. Enter search criteria. (***Reminder****: At least one search criteria must be entered to execute a search; The EIM/ESM wildcard symbol is the percentage sign - %.*)
3. Select the [**Search**] button. *The search results appear.*



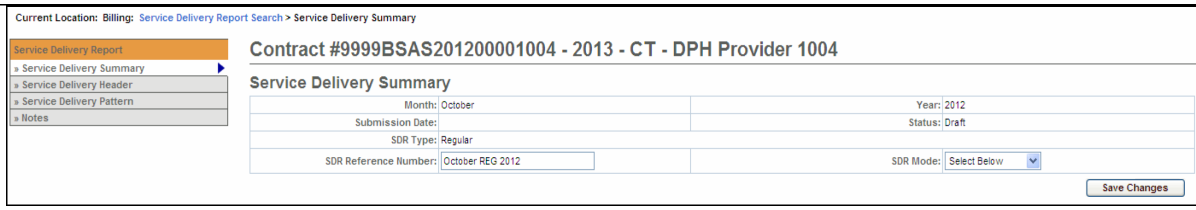
Status	SDR Type	Submission Date	Service Month	Service Year	Activity Name	Contract Number	Contracting Provider Name
Partially Passed	Regular	01/21/2013	August	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004
Draft	Supplemental		August	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004
Partially Released	Supplemental		September	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004
Partially Passed	Regular	01/21/2013	September	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004
Draft	Regular		October	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004
Draft	Supplemental		July	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004
Partially Passed	Regular	01/18/2013	July	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004

4. Select an SDR.

*The **Service Delivery Summary** page appears with the roster of clients.*

Enter the SDR Reference Number (if applicable)

1. Access the **Service Delivery Summary** page.
2. Enter the [SDR Reference Number].
3. Select the [**Save Changes**] button.



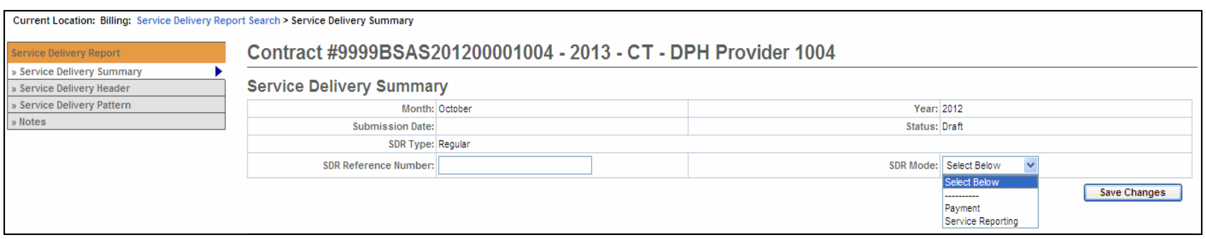
Important Notes:

- *The SDR Reference Number may only be edited when the SDR is in **Draft** status.*
- *The SDR Reference Number may be used to conduct a PRC search and determine payment status. To learn more, consult the Payment Tracking Job Aid. You might also find the Status Job Aid helpful.*

Enter the SDR Mode (*Required for DMH Community Based Flexible Supports providers only*)

The SDR Mode is a **required** field for providers who are part of the Community Based Flexible Supports contracts with the Department of Mental Health. All other providers may ignore this field.

1. Access the **Service Delivery Summary** page.
2. Enter the [**SDR Mode**]:
   - **Payment** for invoicing
   - **Service Reporting** for claiming
3. Select the [**Save Changes**] button.



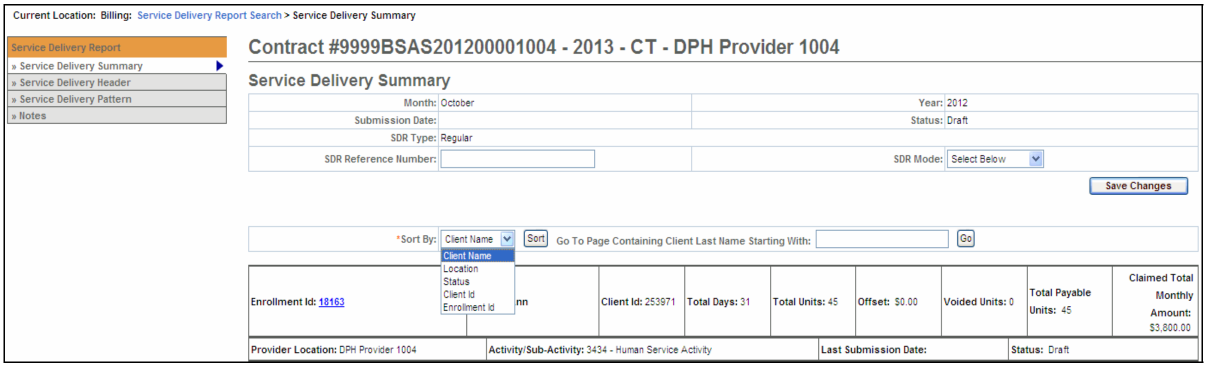
Record Service Delivery Information

Service delivery information may be entered in a single session or throughout the billing period and released at the end of the month.

Important Tips:

- *For Providers using Client Interfaces (Meditech):* You can sort the SDR by Client ID, Enrollment ID, Client Name, and Provider Location. If sorting by Provider Location and you do not see a client record, check the Provider Organization Parent level location. All new or updated interfaced client enrollment records come into EIM at the Parent level of the organization from the agency enrolling system, i.e. Meditech. To learn more about Manage Enrollment Locations functionality, take online course 159: Manage Enrollment Locations in PACE (www.pace.state.ma.us/vg).
- If you want to go to a page containing a specific client record, you can use the [**Go To Page Containing Client Last Name Starting With]** field. Simply enter all or part of a client's last name, click [**Go]**, and you will be brought to the page containing that record. You may need

to scroll down to see it. Using this feature will "over-ride" any previous sorts.

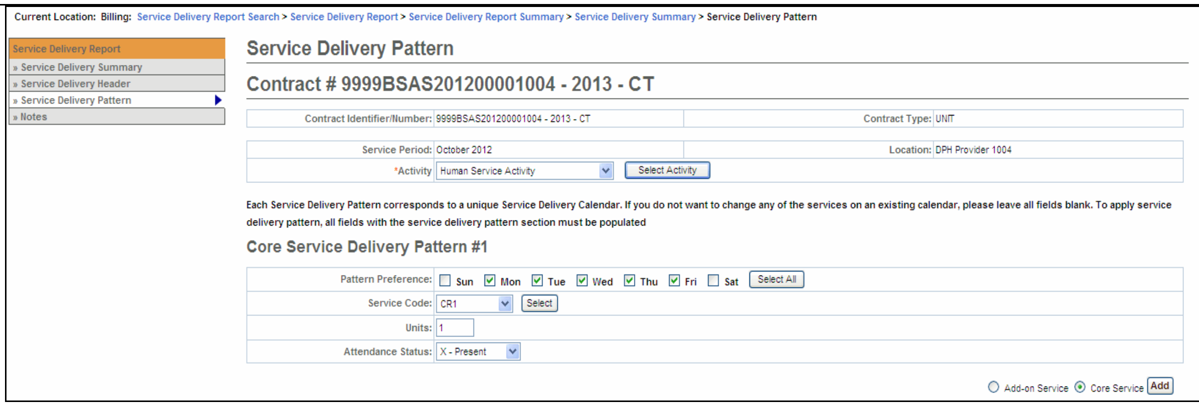


- You can use the **Comments** field on the **Record Service Delivery** page to enter a note at the client-level.
- On the **Record Service Delivery** page to record or edit information for the next client in the list, click **[Next Client]** or to return to the previous client use **[Previous Client]**. To clear the Service Delivery Report Calendar, click **[Clear All]**.
- When you are finished entering information, always click **[Save Changes]**. If you **do not** save changes you will lose the data you've just entered.
- When you are finished with a session, click the **[Unlock All Enrollments]** button on the **SDR Summary** page. If you do not unlock the enrollments, other staff users may not be able to access the SDR.

Record Service Information for Multiple Clients at one time

Apply a Service Delivery Pattern to Core Service Delivery Pattern #1:

1. Select **Service Delivery Pattern** from the navigation bar.
2. Select the [**Activity Code**] from the drop-down menu options and select the [**Select Activity**] button. If only one activity code exists, the system will default to it, but you need to still select the [**Select Activity**] button.
3. Under the **Core Service Delivery Pattern #1**,
   - Place a checkmark next to the [**Pattern Preference**] field to indicate the days of the week that you wish to report billing on. If you bill for all seven days, you can click the [**Select All**] button and it places checkmarks in all the checkboxes for you.
   - Select the [**Service Code**] drop down menu to choose the service code and select the [**Select**] button.
   - Enter the [**Unit(s)**].
   - Select the [**Attendance Status**] from the drop down menu options.



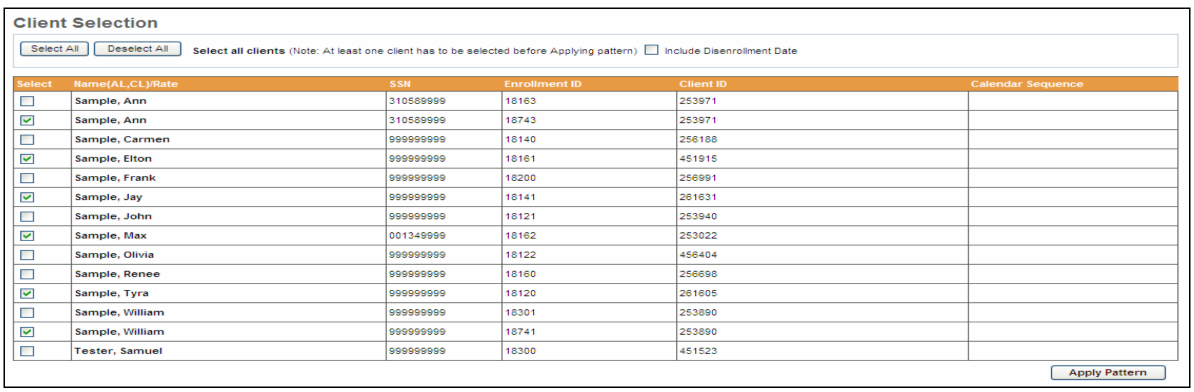
4. Under **Client Selection**,

   - Select the [**Select All**] if all clients on this SDR are reporting the same attendance pattern.

   OR

   - Place a checkmark next to each client that is reporting the same attendance pattern.

5. Select the **[Apply Pattern]** button. EIM/ESM will display the Service Delivery Apply Pattern In Progress bar. Once the pattern has been applied, the system returns you to the Service Delivery Summary page.


Client Selection

Select All | Deselect All | **Select all clients** (Note: At least one client has to be selected before Applying pattern) ☐ Include Disenrollment Date

Select	Name(AL,CL)/Rate	SSN	Enrollment ID	Client ID	Calendar Sequence
☐	Sample, Ann	310589999	18163	253971	
☑	Sample, Ann	310589999	18743	253971	
☐	Sample, Carmen	999999999	18140	256188	
☑	Sample, Elton	999999999	18161	451915	
☐	Sample, Frank	999999999	18200	256991	
☑	Sample, Jay	999999999	18141	261631	
☐	Sample, John	999999999	18121	253940	
☑	Sample, Max	001349999	18162	253022	
☐	Sample, Olivia	999999999	18122	456404	
☐	Sample, Renee	999999999	18160	256698	
☑	Sample, Tyra	999999999	18120	261605	
☐	Sample, William	999999999	18301	253890	
☑	Sample, William	999999999	18741	253890	
☐	Tester, Samuel	999999999	18300	451523	

Apply Pattern

Important Note: After applying a pattern, services can never be removed as a group, they can only be added. The pattern is irreversible. To adjust services, you must edit client records individually.

Note: The **Include disenrollment date** checkbox allows the user to bill for the disenrollment date. This is determined by each individual agency. Please be sure to confirm with your Agency Contract Manager.

Apply a Service Delivery Pattern to Core Service Delivery Pattern #2:

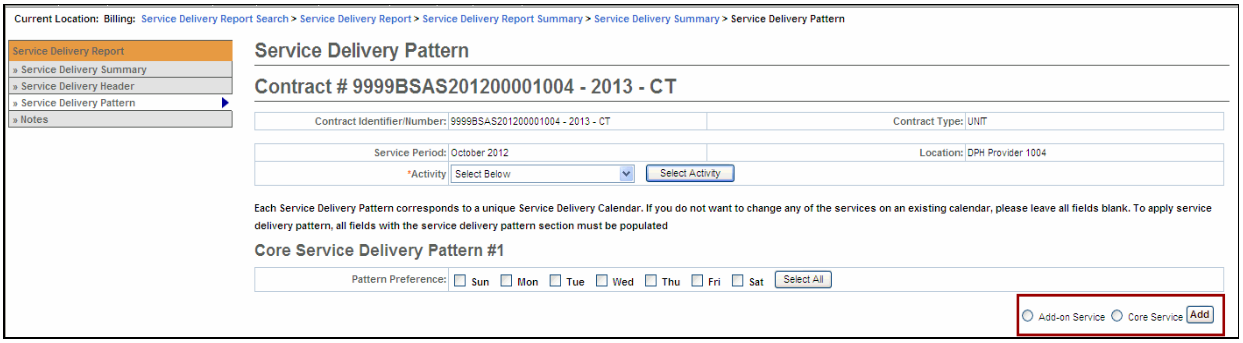
Apply a Service Delivery Pattern:

1. Select **Service Delivery Pattern** from the navigation bar.

2. Select the [**Activity Code**] from the drop-down menu options and select the [**Select Activity**] button. If only one activity code exists, the system will default to it, but you need to still select the [**Select Activity**] button.

3. Select the [Core Service] radio button and then select the [**Add**] button. This will add in a

second Core calendar.



4. Under the **Core Service Delivery Pattern #2**,

Reminder: Remember to complete the Core Service Delivery Pattern #2 options and not the #1 option. You do not want to overwrite a previously applied service pattern.

- Place a checkmark next to the [**Pattern Preference**] field to indicate the days of the week that you wish to report billing on. If you bill for all seven days, you can click the [**Select All**] button and it places checkmarks in all the checkboxes for you.
- Select the [**Service Code**] drop down menu to choose the service code and select the [**Select**] button.
- Enter the [**Unit(s)**].
- Select the [**Attendance Status**] from the drop down menu options.

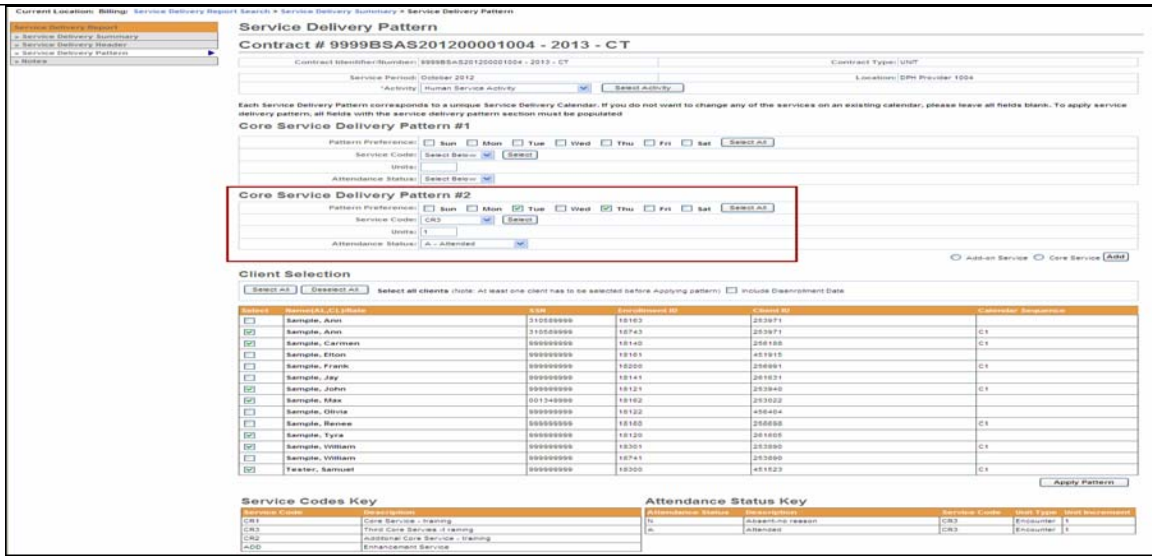
5. Under Client Selection,

- Select the [**Select All**] if all clients on this SDR are reporting the same attendance pattern.

OR

- Place a checkmark next to each client that is reporting the same attendance pattern.

6. Select the **[Apply Pattern]** button. EIM/ESM will display the Service Delivery Apply Pattern In Progress bar. Once the pattern has been applied, the system returns you to the Service Delivery Summary page.

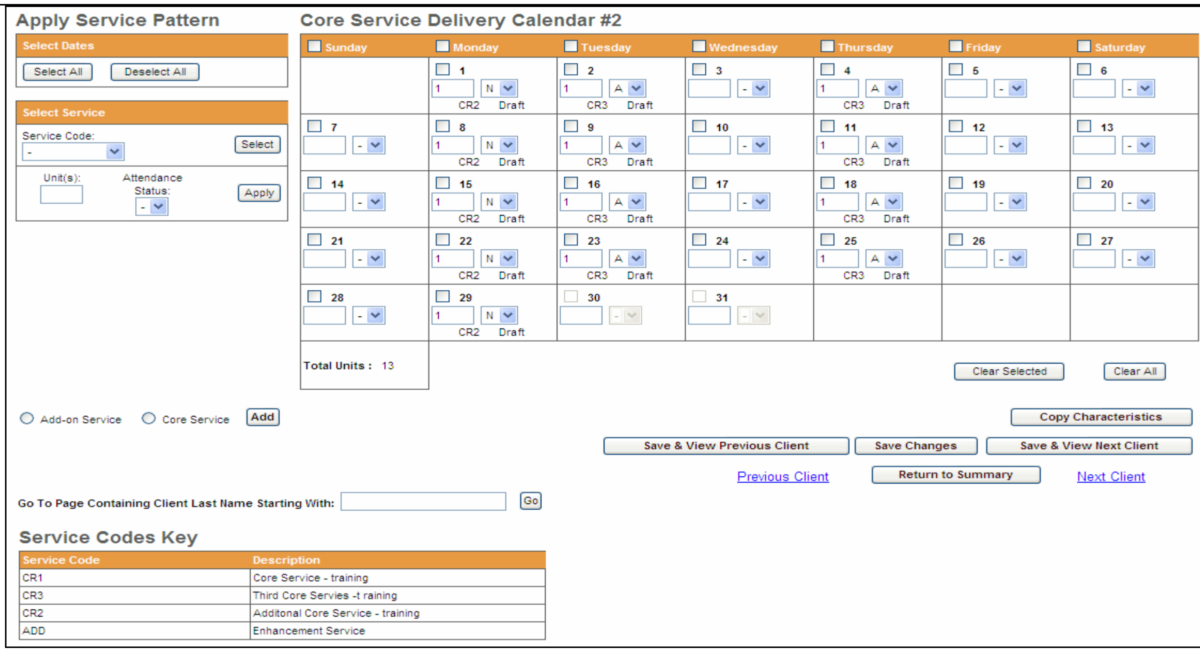


Apply a Pattern to a Single Client – Core Service

Note: Up to 4 Core calendars can be added per billing month per client. If additional calendars are needed, submit a Supplemental.

1. Access the **Service Delivery Summary** page.
2. Select the [**Enrollment Id**] link for a client.

   *The **Record Service Delivery** page appears with client details.*
3. Enter services/resubmit correct information on the client record.
   - Using the **Apply Service Pattern, Select Date section**,
     1. Select the [**Select All**], [**Deselect All**] or check off the specific dates on the calendar that services were provided for selected client, by checking the checkboxes.
     2. Select the [**Service Code**] drop down menu to choose the service code and select the [**Select**] button. (Selecting this button is required to generate the correct list of Attendance Codes)
     3. Enter the [**Unit(s)**].
     4. Select the [**Attendance Status**] from the drop down menu options.
     5. Select the [**Apply**] button.



4. Select the [**Save Changes**] button. *A message appears, "Record has been updated successfully."*

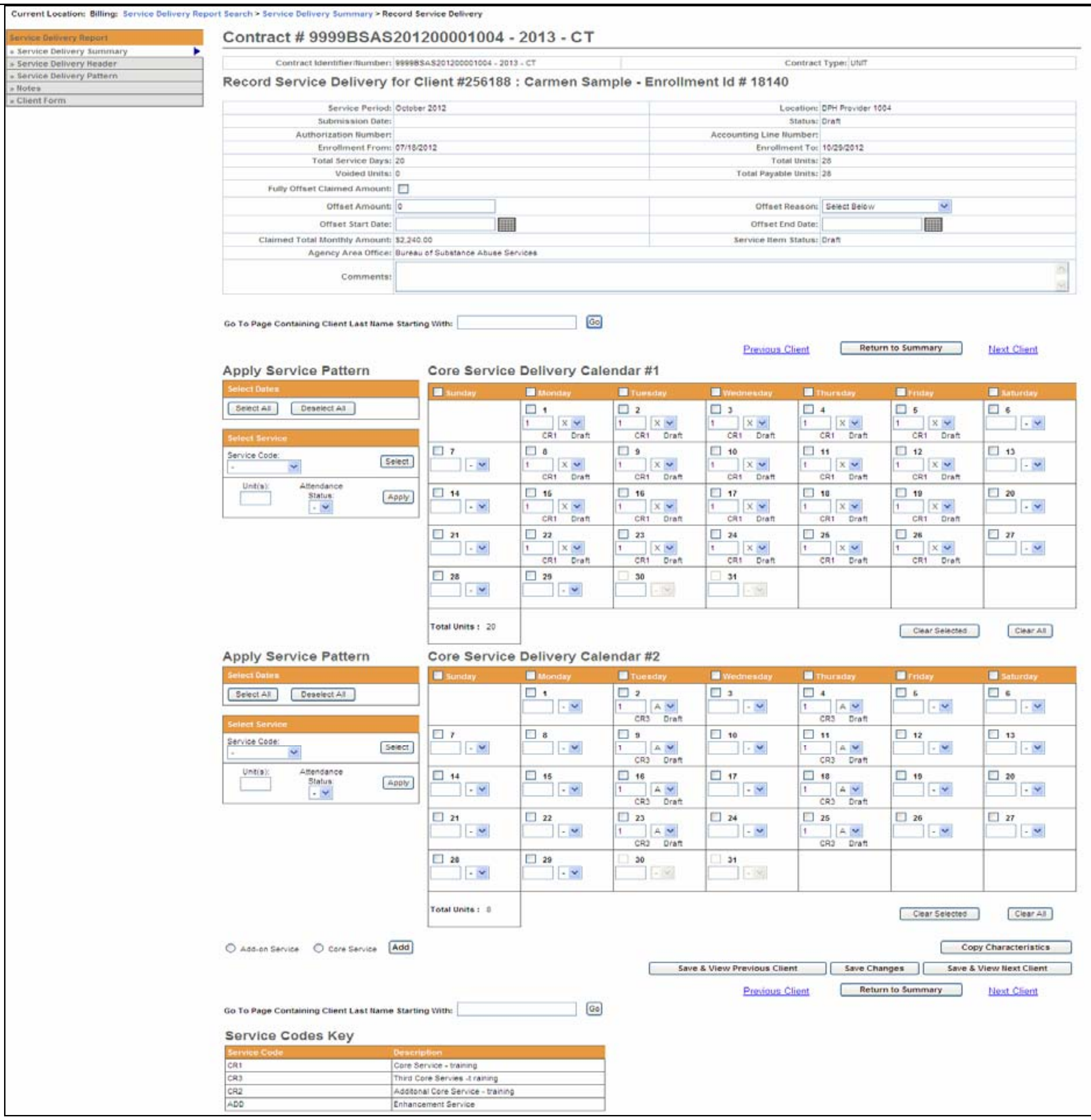
If additional Core calendars are needed,

1. Select the radio button next to [**Core Service**] and select the [**Add**] button.
2. Repeat above steps if additional calendars are needed for a client.

Apply a Pattern to a Single Client – Add-on Service

Note: Core services should be added first and then Add-on Services.

1. Access the **Service Delivery Summary** page.
2. Click the Enrollment Id link for a client.
3. *The **Record Service Delivery** page appears with client details.*
4. Select the radio button next to [**Add-on Service**] and select the [**Add**] button.
5. Enter services/resubmit correct information on the client record.
   a. Using the **Apply Service Pattern, Select Date section**,
      1. Select the [**Select All**], [**Deselect All**] or check off the specific dates on the calendar that services were provided for selected client, by checking the checkboxes.
      2. Select the [**Service Code**] drop down menu to choose the service code and select the [**Select**] button. (Selecting this button is required to generate the correct list of Attendance Codes)
      3. Enter the [**Unit(s)**].
      4. Select the [**Attendance Status**] from the drop down menu options.
      5. Select the [**Apply**] button.



6. Select the [**Save Changes**] button. *A message appears, "Record has been updated successfully."*

If additional Add On calendars are needed,

1. Select the radio button next to [**Add-On Service**] and select the [**Add**] button.
2. Repeat above steps if additional calendars are needed for a client.

Client Form (Progress Documentation Form)

(Required for Competitive Integrated Employment Services (CIES) providers only)

The Client Form (also known as the Progress Documentation Forms) is required by providers who are part of the Competitive Integrated Employment Services (CIES) programs with the Department of Developmental Services (DDS), Department of Transitional Assistance (DTA) and/or

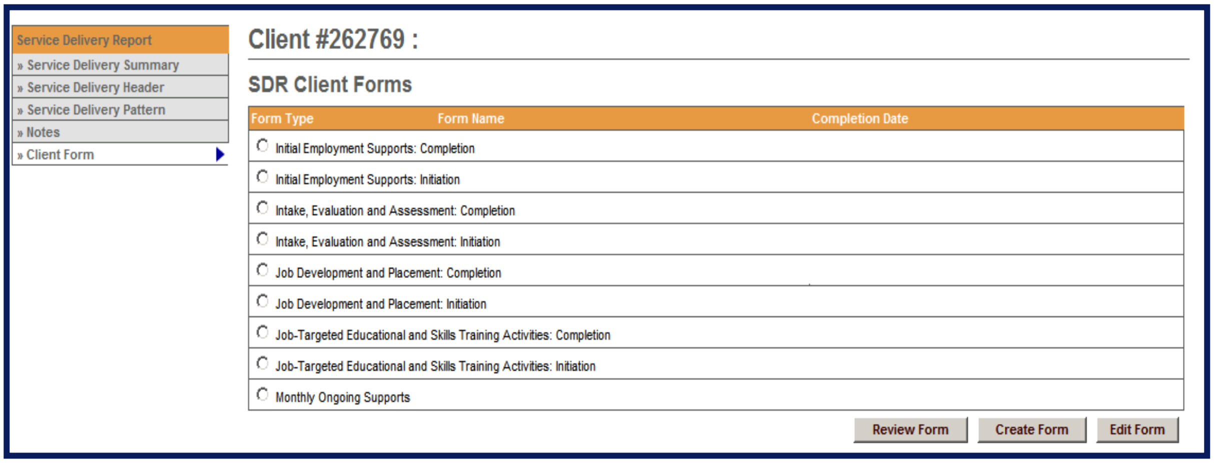
Massachusetts Rehabilitation Commission (MRC).

This section is only applicable to providers participating in the CIES program..

1. Access the **Service Delivery Summary** page.
2. Select the Enrollment Id link for a specific client.

   *The **Record Service Delivery** page appears with client details.*
3. Select [**Client Form**] on the left navigation menu.

The SDR Client Form appears.



4. Select the radio button next to client form that needs to be completed for billing.
5. Select the [**Create Form**] button.
6. Complete all required fields as indicated on client form.
7. Select the [**Submit**] button.

   *The **Record Service Delivery** page appears with client details.*

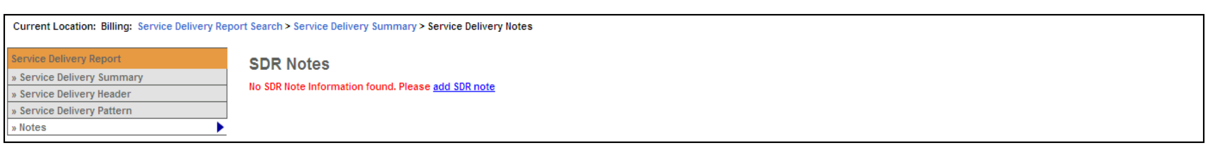
Important Information for CIES Providers – Hourly-based Component Billing and On Going Support: After submitting the Client Form, you are also required to add SDR Notes. See "Add an SDR Note" section within this job aid for steps on adding an SDR Note.

***Note**: The Client Form page displays a [**Review Form**] and [**Edit Form**] button, if needed.*

To learn more on completion of Client Forms, consult the CIES Progress Documentation Job Aid.

Add an SDR Note (if applicable)

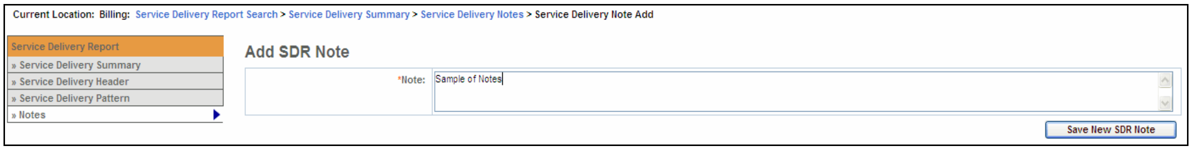
1. Access the **Service Delivery Summary** page.
2. Select [**SDR Notes**] from the left navigation bar.



   *The **Service Delivery Notes** page appears.*
3. Click Add SDR note link if no SDR information was found or **[Add SDR Note]**.

*The **Service Delivery Note Add** page appears.*

4. Enter note. (*See "**Note for CIES Providers**" for guidance on completing this field.)



**Note for CIES Providers that record hourly services and/or Ongoing Support:*

For clients who have completed and initiated a component in a given month, providers are required to enter the client name(s) in the SDR Notes field.

Providers will need to enter the following text in the SDR Notes field:

Completion: [list names] and Initiation [list names].

5. Select the [**Save New SDR Note**] button. *The **Service Delivery Notes** page appears with the entered note.*

***Note to all other Providers**: The SDR Notes field should be used as directed by your Contract Manager.*

Copy Service Delivery Information

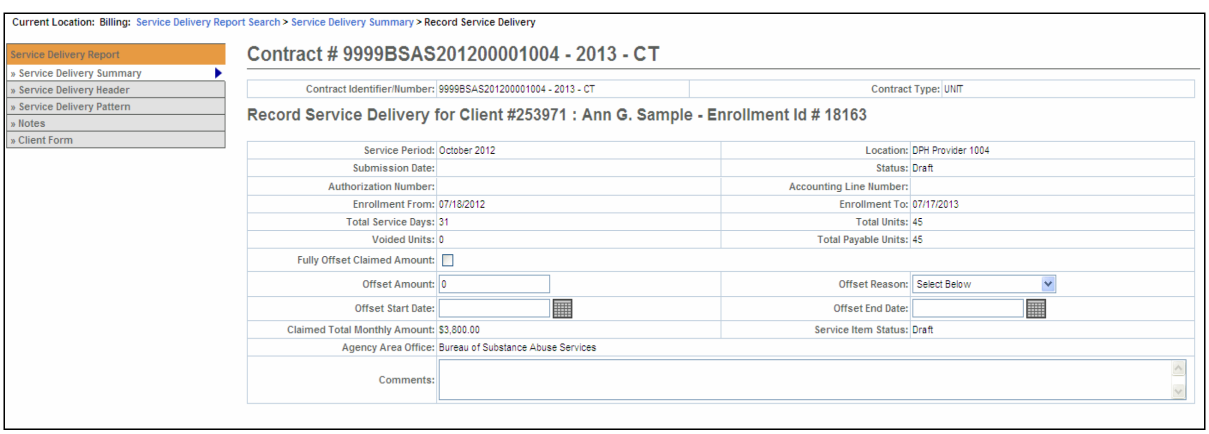
1. Access the ***Record Service Delivery*** page for a client.
2. Enter service delivery information if needed. If changes were made select the [**Save Changes**] button.
3. Select the [**Copy Characteristics**] button.
4. Select one or more clients and select the [**Apply Pattern**] button.

*The **Service Delivery Summary** page appears with the newly entered information.*

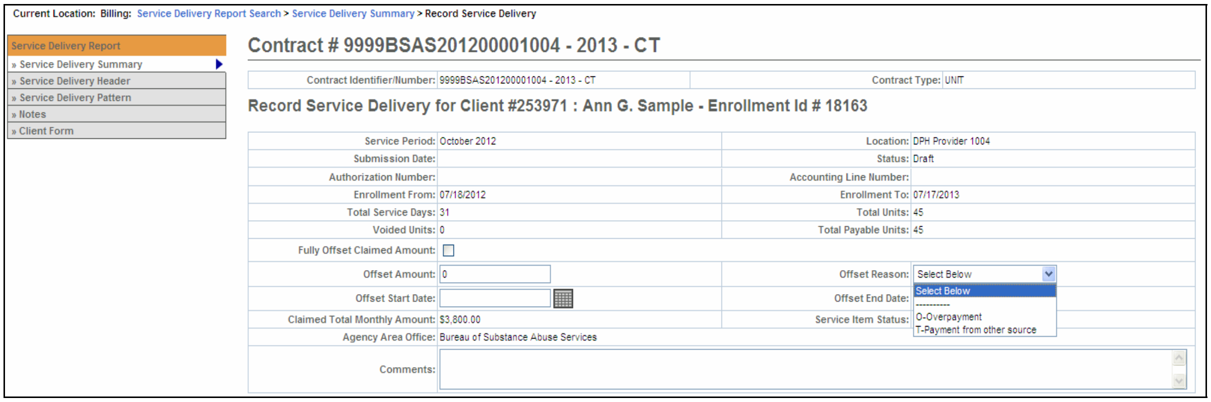
Tip: Use **[Select All]** and **[Deselect All]** buttons to select or deselect all clients.

Enter an Offset at the Client-Level (if applicable)

1. Access the **Service Delivery Summary page.**
2. Select the **Record Service Delivery** record for a client.



3. Enter offset amount. (Only when it is a partial offset)
4. Select an [**Offset Reason**] from the drop down box.
5. If the entire charged amount is to be offset, check the [**Fully Offset Claimed Amount]** checkbox.
6. Select the [**Save Changes**] button.



A message appears, "Record has been updated successfully" will appear.

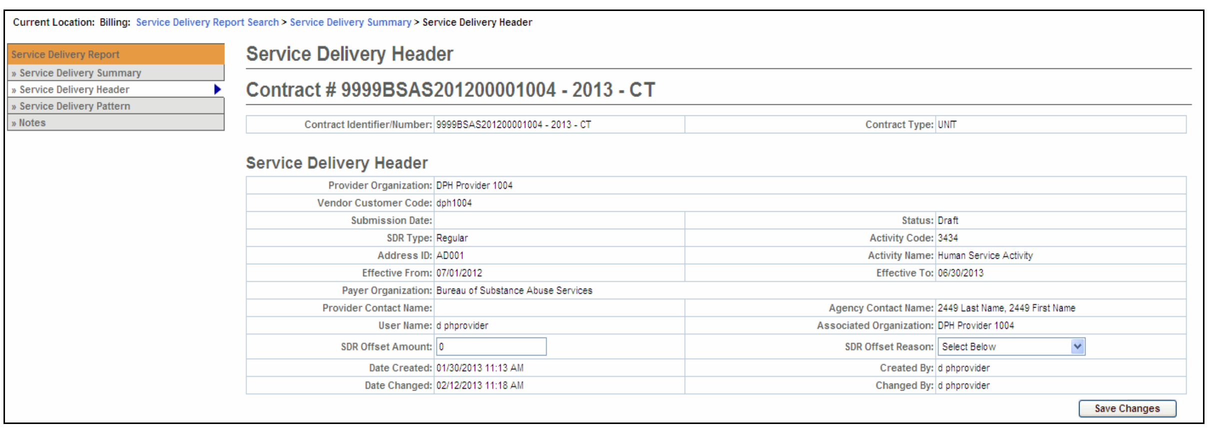
*Note that if the **Fully Offset Claimed Amount** checkbox was checked, the **Offset Amount** displays the claimed value and the **Claimed Total Monthly Amount** updates to $0.*

Important: If you apply an offset at the client-level, you **cannot** enter an offset at the header-level.

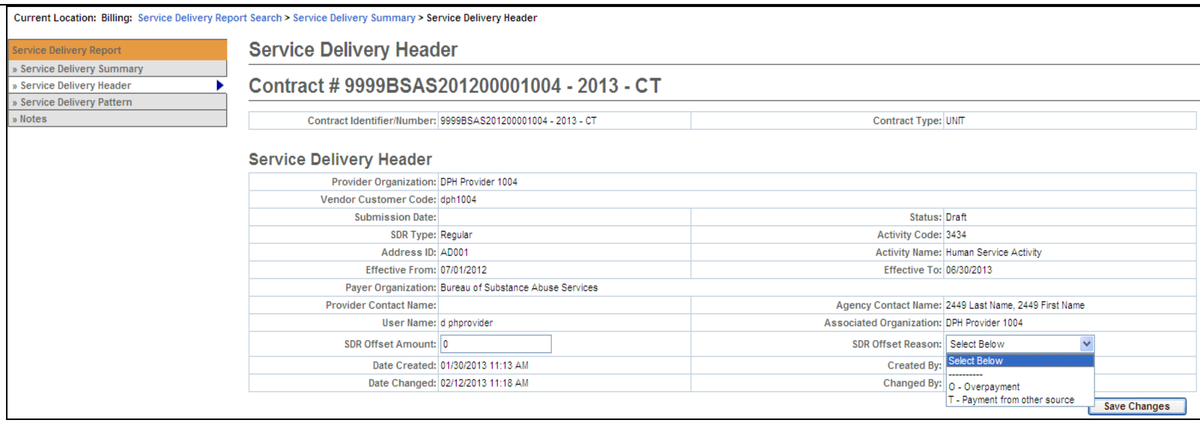
Enter an Offset at the SDR Header - Level (if applicable)

1. Access the **Service Delivery Summary page.**
2. Select [**Service Delivery Header**] from the left navigation bar.

   *The **Service Delivery Header** page appears.*



3. Enter offset amount.
4. Select an [**Offset Reason**] from the drop down box.
5. Select the [**Save Changes**] button.

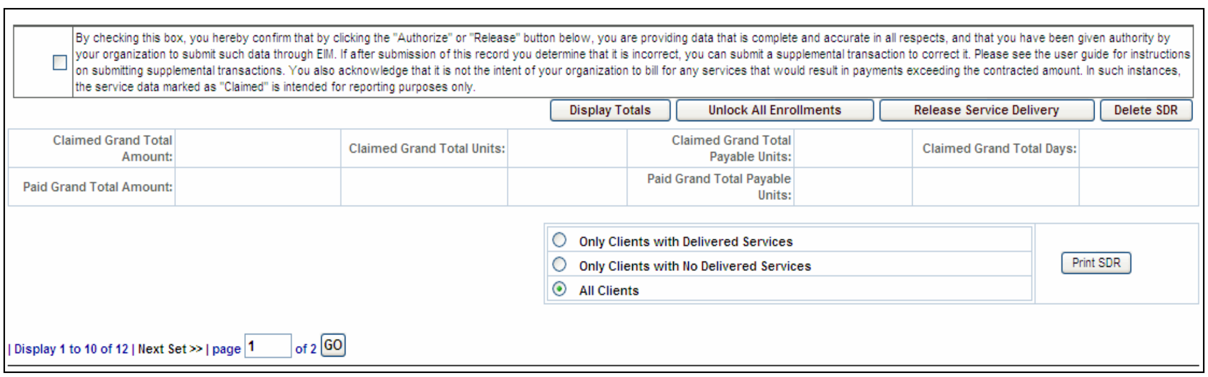


A message appears, "You have successfully updated the record" will appear.

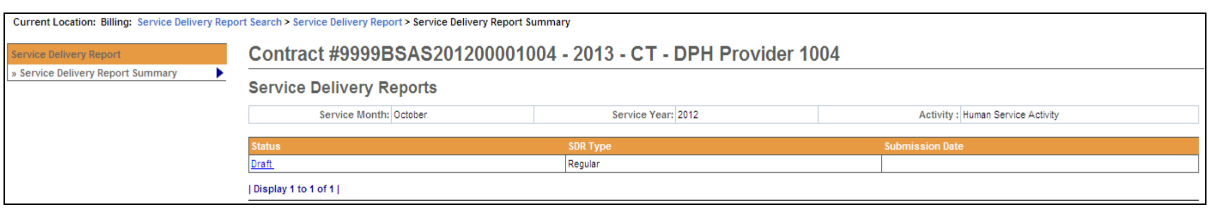
Important: If you apply an offset at the header-level, you **cannot** enter an offset at the client-level.

Unlock All Enrollments

1. Access the **Service Delivery Summary** page.
2. Click **[Unlock All Enrollments]** button.



*The **Service Delivery Report Summary** page appears.*



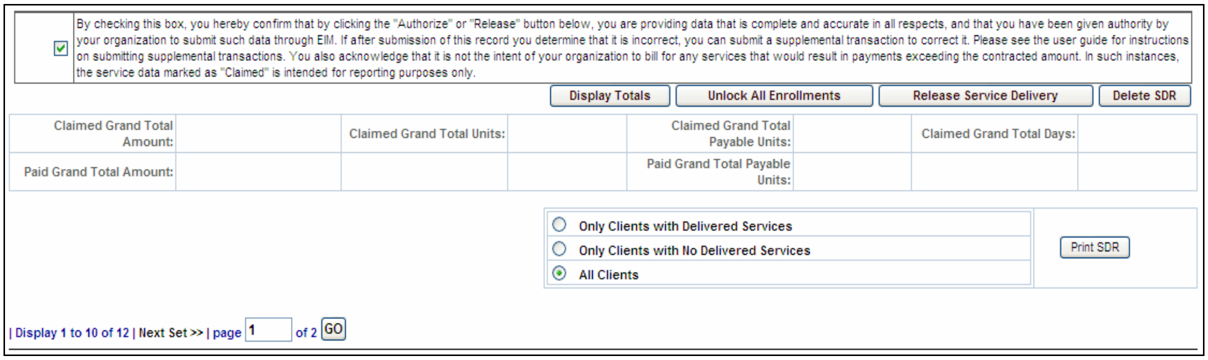
Important: Remember to **unlock** the SDR when you are done editing to allow users access to the clients.

Release an SDR

1. Access the **Service Delivery Summary** page.
2. Click the checkbox to confirm data is accurate and complete.

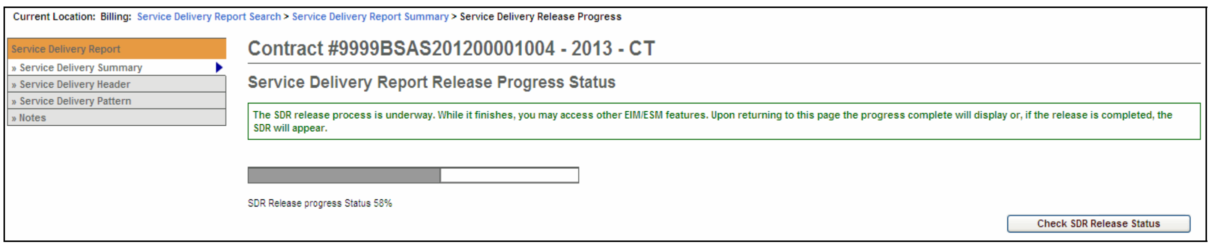
   By selecting the checkbox you are complying with legal requirements on releasing a service *delivery report.*

3. Select the [**Release Service Delivery**] button.



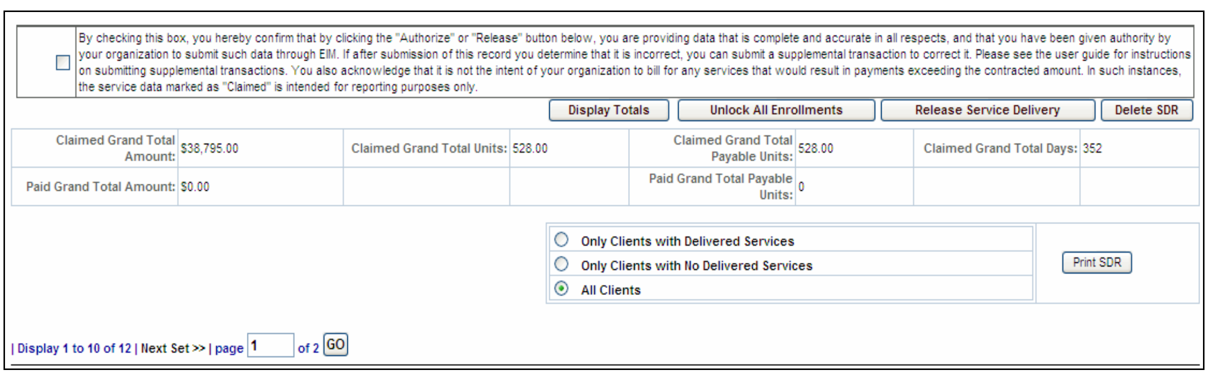
4. Select the [**Check SDR Release Status**] button.

   By selecting the 'Check SDR Release Status' button on the Service Delivery Release Progress screen, the SDR Release Progress bar updates.



Authorize an SDR

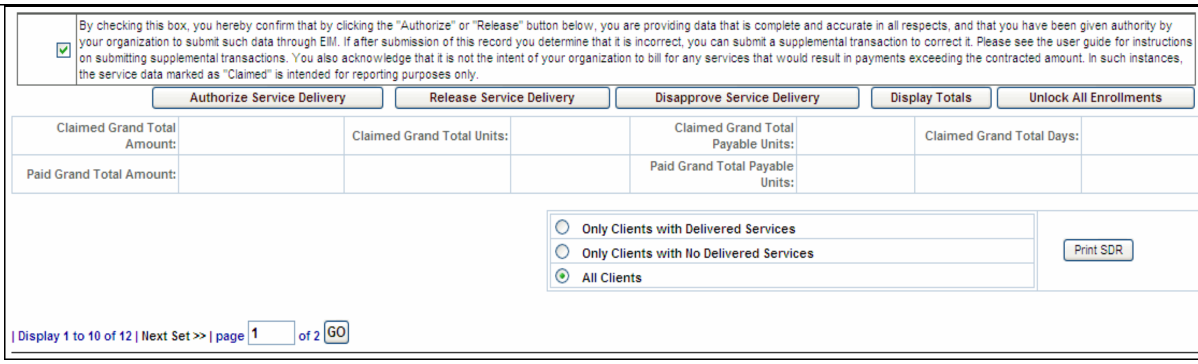
1. Access the **Service Delivery Summary** page of a released SDR.
2. Confirm SDR totals by selecting the [**Display Totals**] button and viewing the values that result.



3. Select the checkbox to confirm data is accurate and complete.

   By clicking the checkbox you are complying with legal requirements on authorizing a service delivery report.

4. Select the [**Authorize Service Delivery**] button.



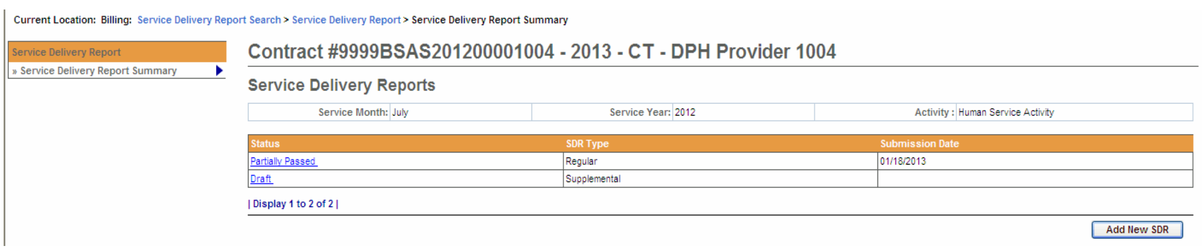
*Once the adjudication is complete, the **Service Delivery Report Summary** page appears.*

***Note:** If the SDR Authorizer finds an error, the SDR can be disapproved by selecting the **[Disapprove Service Delivery Report]** button. Disapproving the SDR changes the status from **Released** to **Draft** so the error can be corrected. You can disapprove an SDR in **Released** or **Partially Released** status (when any one of the clients on the SDR is with out any services).*

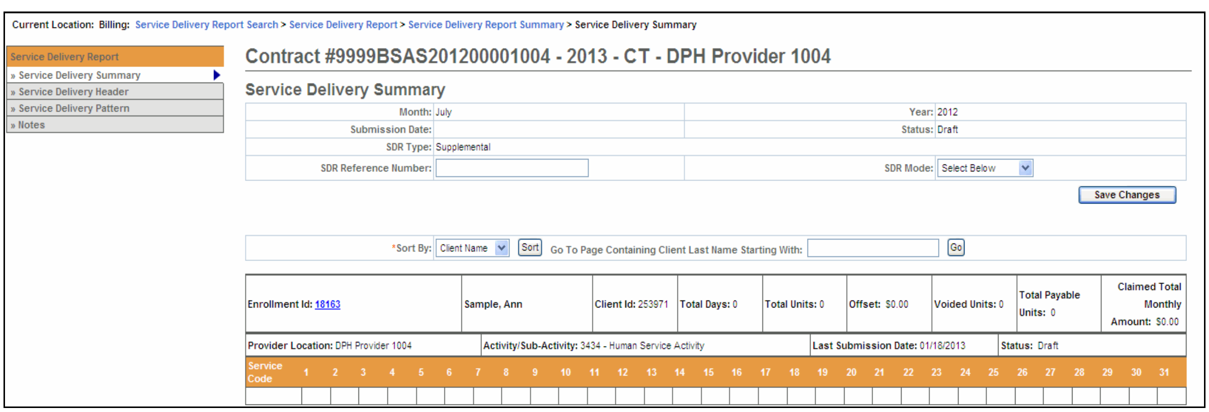
Create a Supplemental SDR

A designated user from the parent organization should monitor client denials, create supplemental SDRs, and notify locations that need to enter data or make corrections.

1. Access the **Service Delivery Report Search** page.
2. Select the [**Add/Edit SDR**] button. *The page reappears with a supplemental SDR Draft link.*



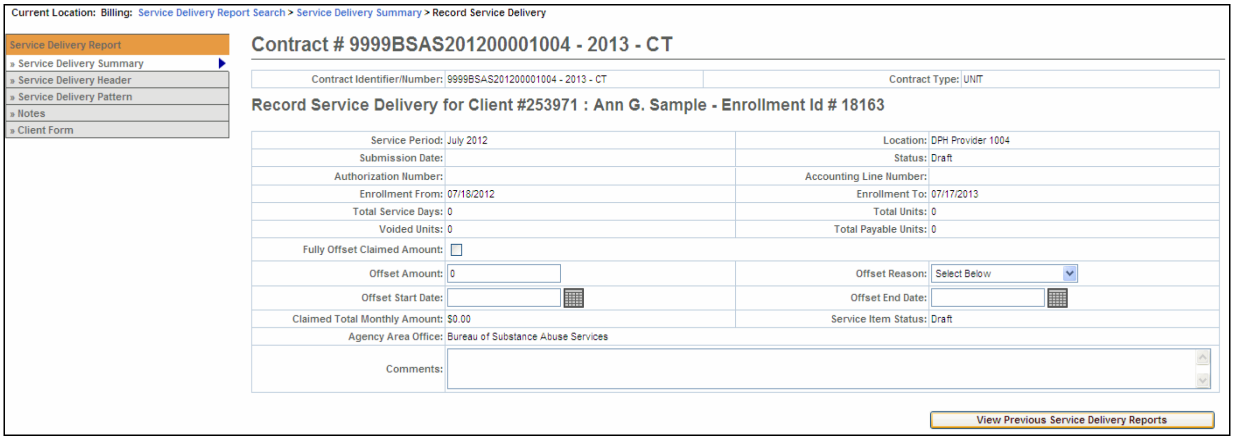
3. Select the Draft link. *The **Service Delivery Summary** page appears with a roster of clients.*



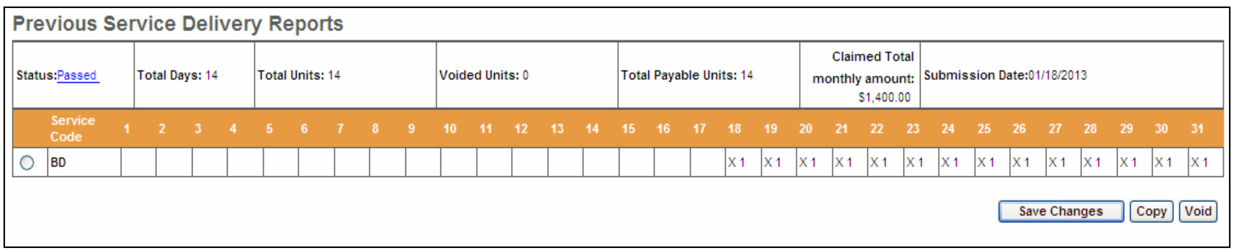
Enter Services on a Supplemental SDR

You may need to enter services that were omitted from regular SDR or, if the clients on the SDR have been denied, you may need to resubmit the correct information.

1. Access the **Service Delivery Summary** page.
2. Select the Enrollment ID link for a client. *The **Record Service Delivery** page appears.*
3. Select the [**View Previous Service Delivery Reports**] button.



The system will display the previous SDR and indicate the status that it is in.



If prior record is Rejected:

a. *If you are resubmitting services that were previously rejected, you must first void those services. (See following section)*

b. *If the prior record includes more than one Service Code, the void will be applied to all codes, including those that were not rejected. All service codes will have to be re-billed.*

If prior record is Denied

a. *If the prior services are denied, there is no need to void those services.*

***Tip**: See the Copy section for steps to copy the prior services to the supplemental calendar.*

4. Enter services/resubmit correct information on the client record.

   a. Using the **Apply Service Pattern, Select Date section**,

      1. Select the [**Select All**], [**Deselect All**] or check off the specific dates on the calendar that services were provided for selected client, by checking the checkboxes.

2. Select the [**Service Code**] drop down menu to choose the service code and select the [**Select**] button. (Selecting this button is required to generate the correct list of Attendance Codes)
3. Enter the [**Unit(s)**].
4. Select the [**Attendance Status**] from the drop down menu options.
5. Select the [**Apply**] button.
6. Select the [**Save Changes**] button. *A message appears, "Record has been updated successfully."*

5. Repeat above steps if there are additional calendars that need updating for the selected client.

***Reminder**: Once all of the billing information has been updated remember to Release and Authorize this Supplemental SDR.*

Void Services on a Supplemental SDR

Note: If the SDR has been paid and services were incorrectly submitted, use the **Void** button to void the entire previous month's record. You can then resubmit the correct information.

1. Access the **Service Delivery Summary** page.
2. Select the Enrollment ID link for a client. *The **Record Service Delivery** page appears.*
3. Select the [**View Previous Service Delivery Reports**] button.

The system will display the previous SDR and indicate the status that it is in.

4. Select the radio button under the **Previous Service Delivery Reports** heading.
5. Select the [**Void**] **button** and then select the [**Save Changes**] button. *The claim is now voided.*

***Reminder**: Once all of the billing information has been updated remember to Release and Authorize this Supplemental SDR.*

Copy Services

Instead of re-entering information, you can copy the Previous Service Delivery information and, if necessary correct any days that are in error.

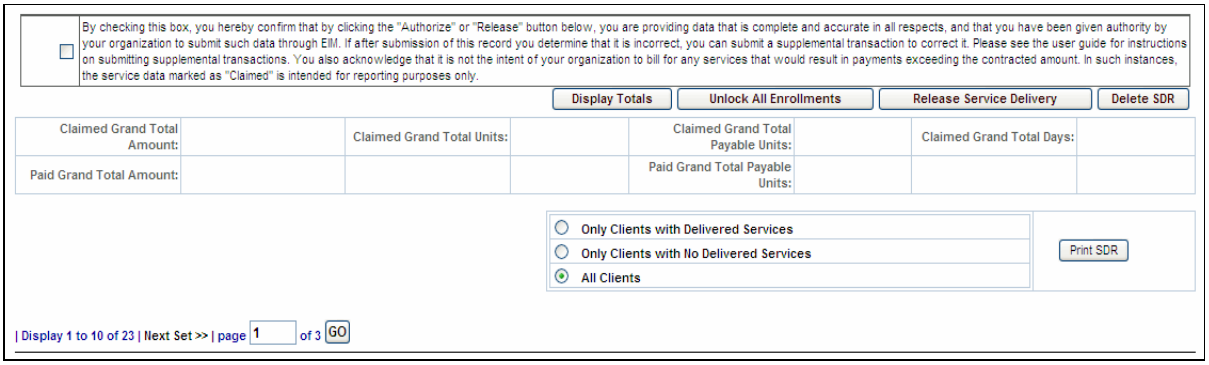
1. Select the radio button under the **Previous Service Delivery Reports** heading.
2. Select the [**Copy**] button. *The previous month's regular SDR has been copied over.*
3. Edit service information on the calendar, if needed.
4. Select the [**Save Changes**] button. *A message appears, "Record has been updated successfully."*

***Reminder**: Once all of the billing information has been updated remember to Release and Authorize this Supplemental SDR.*

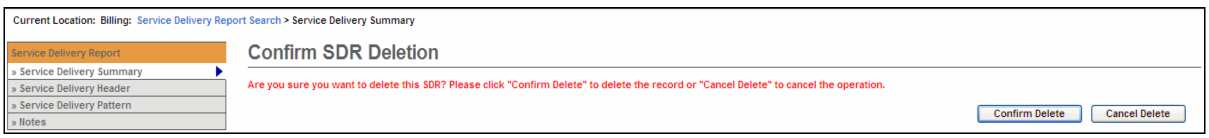
Delete an SDR

In rare circumstances, it might be necessary to delete an SDR created in error. Only an SDR in Draft status without any voided services associated with it may be deleted.

1. Access the Service Delivery Summary page.
2. Select the [**Delete SDR**] button.



3. Select the [**Confirm Delete**] button to proceed.

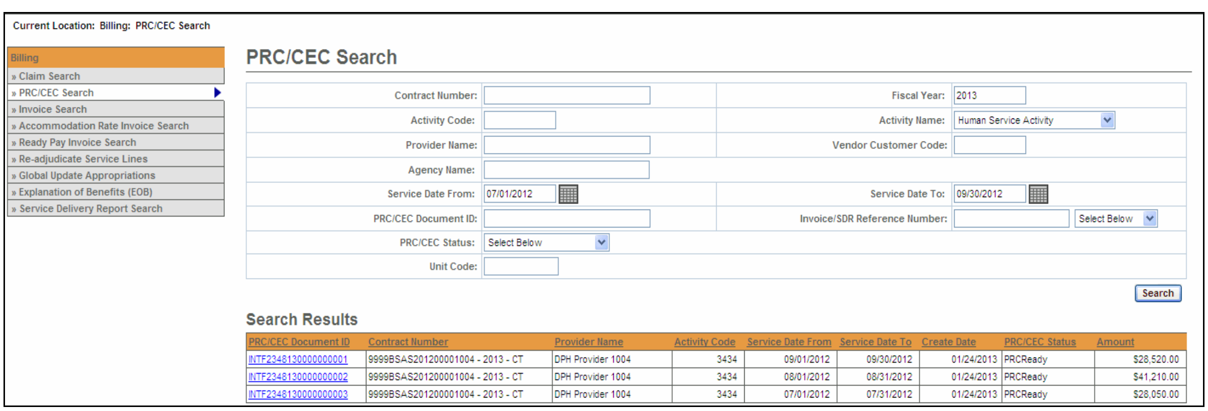


***Note**: The Delete SDR button will only appear if your role allows you access to perform that function.*

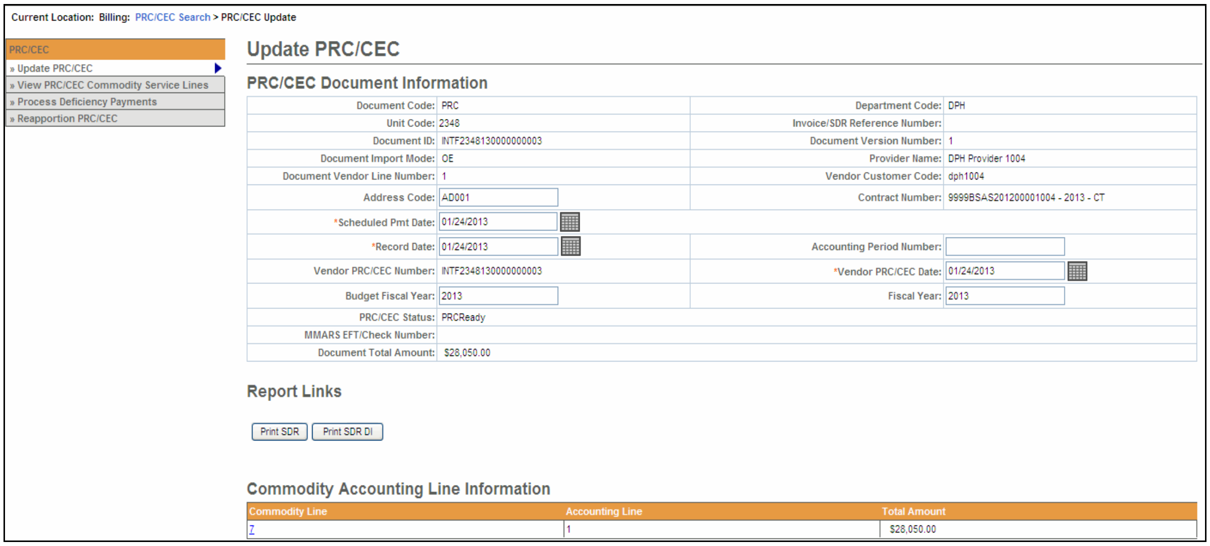
Search for a PRC

Track a Payment Request for Commodity (PRC):

1. Select the **Billing** module.
2. Select **PRC Search** from the left navigation bar. *The **PRC Search** page appears.*
3. Enter search criteria.
4. Select the [**Search**] button.



5. Select the Activity Name link. *The **Update PRC** page appears to view payment information.*



Note: You may not see the PRC you are searching for appear as a search result. Nightly system jobs will turn SDRs into electronic PRCs for Agency approval.

Tip: Providers can use the Invoice/SDR Reference Number field to search against a particular SDR Reference Number. An SDR Reference Number must be entered prior to SDR authorization to allow tracking via a provider-specific reference number.

Generate, View and Save an SDR Report

An SDR may be printed from the Report module or from the Service Delivery Summary page.

Notes to follow regarding how the two options differ:

- **SDR Summary page**: Printing from the Service Delivery Summary infers from the screen the SDR you want to print. Users may also select whether to include clients with delivered services, clients with no delivered services, or all clients.
- **Report Module**: Printing from the Report module allows the user to select input criteria and report output format. Users may also select whether to include clients with delivered services, clients with no delivered services, or all clients.
- Service Delivery Report may be printed by authorized users depending on their access level.

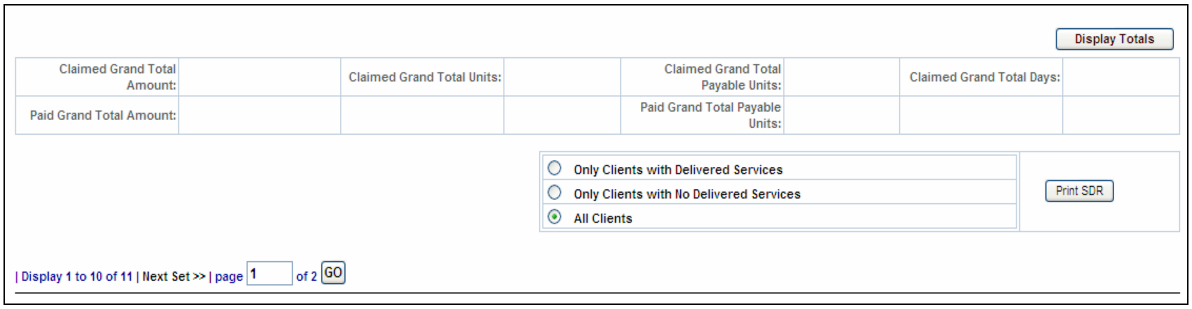
To generate and view from the SDR Summary page:

1. Access the **Service Delivery Summary** page.

At the bottom of the SDR Summary page you will see the Print SDR button and three options:

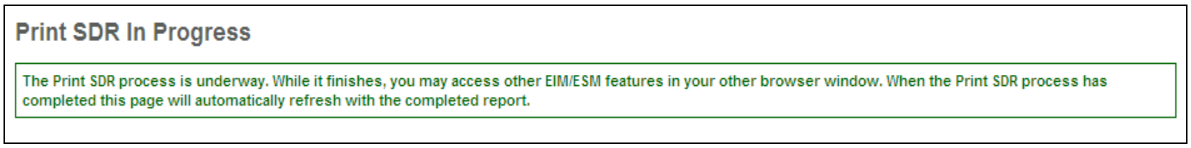
- Only Clients with Delivered Services
- Only Clients with No Delivered Services
- All Clients (Default)

All Clients is the default. It you only want to see clients with delivered services or clients with no delivered services, you will need to select the appropriate radio button.

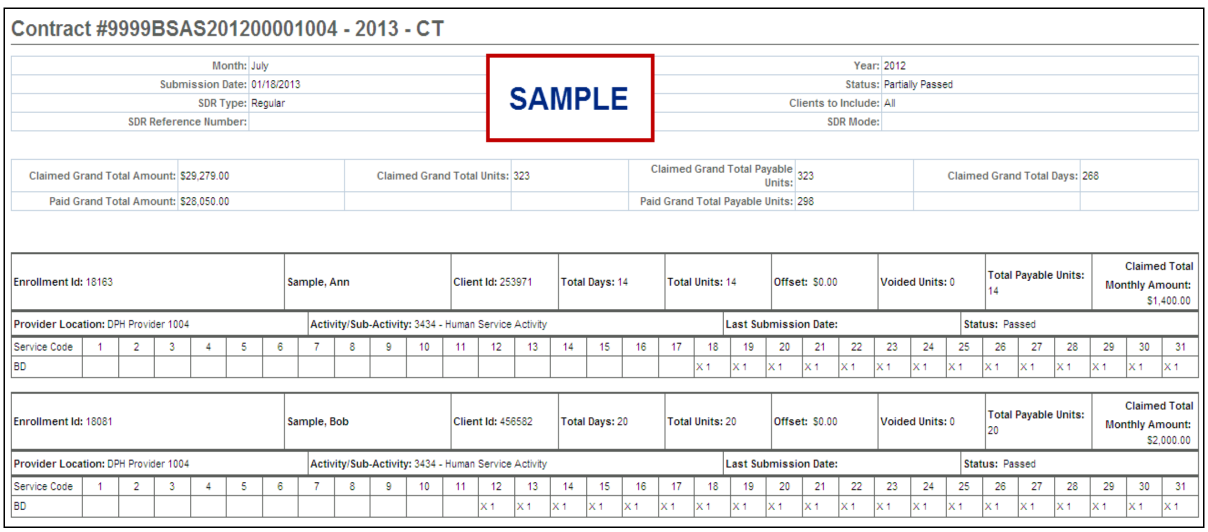


2. Select the [**Print SDR**] button.

The Print SDR in Progress message will open in a secondary window. If the SDR is large it may take some time to generate the report. While the report is generating you can access other EIM/ESM features in another browser window. When the report is finished running this window will automatically refresh and display the report.



This is a sample of the SDR Report.



Contract #9999BSAS201200001004 - 2013 - CT

Month:	July	Year:	2012
Submission Date:	01/18/2013	Status:	Partially Passed
SDR Type:	Regular	Clients to Include:	All
SDR Reference Number:		SDR Mode:	

Claimed Grand Total Amount:	$29,279.00	Claimed Grand Total Units:	323	Claimed Grand Total Payable Units:	323	Claimed Grand Total Days:	268
Paid Grand Total Amount:	$28,050.00			Paid Grand Total Payable Units:	298		

Enrollment Id: 18163	Sample, Ann	Client Id: 253971	Total Days: 14	Total Units: 14	Offset: $0.00	Voided Units: 0	Total Payable Units: 14	Claimed Total Monthly Amount: $1,400.00
Provider Location: DPH Provider 1004	Activity/Sub-Activity: 3434 - Human Service Activity	Last Submission Date:	Status: Passed					

Service Code	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
BD																		X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1

Enrollment Id: 18081	Sample, Bob	Client Id: 456582	Total Days: 20	Total Units: 20	Offset: $0.00	Voided Units: 0	Total Payable Units: 20	Claimed Total Monthly Amount: $2,000.00
Provider Location: DPH Provider 1004	Activity/Sub-Activity: 3434 - Human Service Activity	Last Submission Date:	Status: Passed					

Service Code	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
BD												X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1

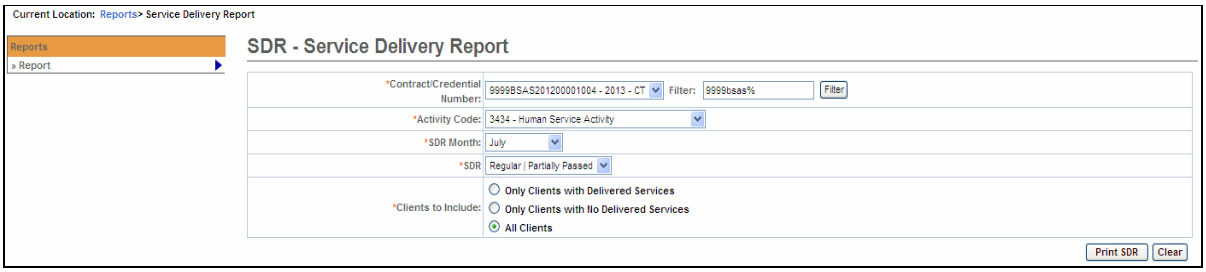
Note that the report generates as a view only file. If you want to save the Print SDR Report, you can by using the Adobe PDF toolbar.

3. Locate the Adobe PDF toolbar from the menu at the top of the page, select **Convert Webpage to PDF** from the available options on the toolbar.
4. Select the location you wish to save file in; modify file name, if desired and select the [**Save**] button.

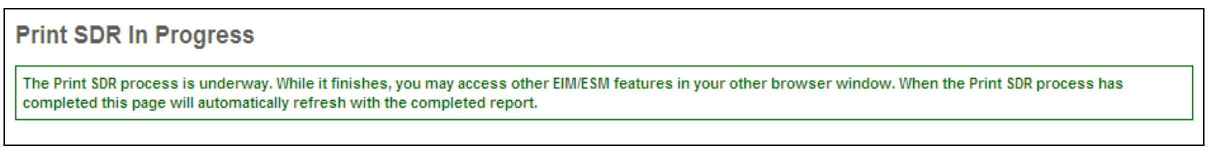
To generate and view from the Reports module:

1. Select the **Reports** module and select the Service Delivery Report link.

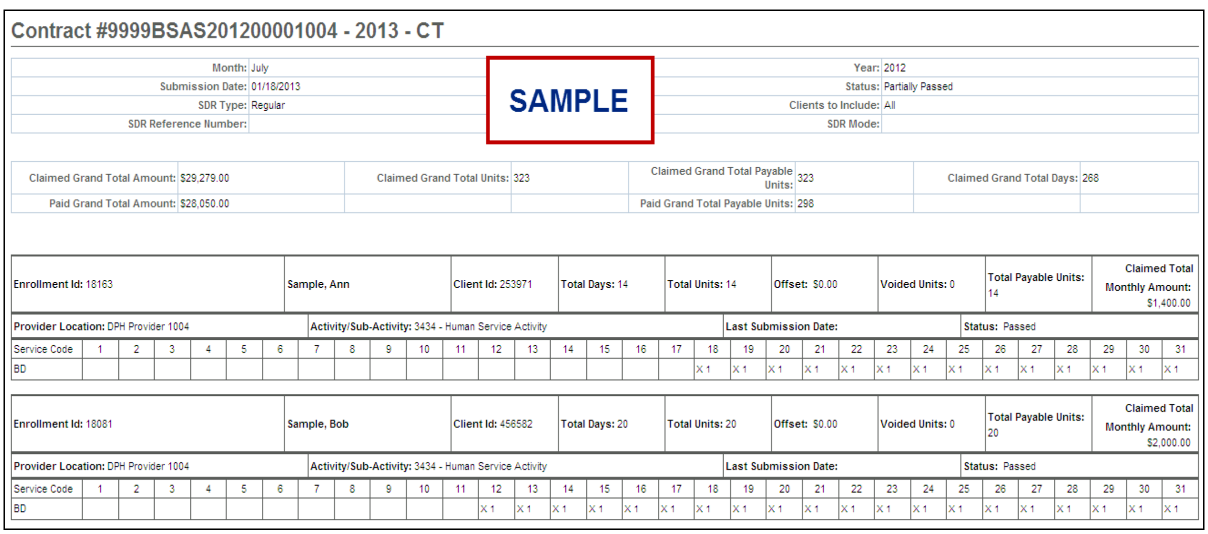
2. Enter criteria.
3. Select the [**Print Report**] button.



4. The Print SDR in Progress message will open in a secondary window. If the SDR is large it may take some time to generate the report. While the report is generating you can access other EIM/ESM features in another browser window. When the report is finished running this window will automatically refresh and display the report.



This is a sample of the SDR Report.



Contract #9999BSAS201200001004 - 2013 - CT

SAMPLE

Month:	July	Year:	2012
Submission Date:	01/18/2013	Status:	Partially Passed
SDR Type:	Regular	Clients to Include:	All
SDR Reference Number:		SDR Mode:	

Claimed Grand Total Amount:	$29,279.00	Claimed Grand Total Units:	323	Claimed Grand Total Payable Units:	323	Claimed Grand Total Days:	268
Paid Grand Total Amount:	$28,050.00			Paid Grand Total Payable Units:	298		

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BD																		X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1

Enrollment Id: 18081	Sample, Bob	Client Id: 456582	Total Days: 20	Total Units: 20	Offset: $0.00	Voided Units: 0	Total Payable Units: 20	Claimed Total Monthly Amount: $2,000.00
Provider Location: DPH Provider 1004	Activity/Sub-Activity: 3434 - Human Service Activity	Last Submission Date:	Status: Passed					

Service Code	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
BD												X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1	X 1

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Webpage to PDF from the available options on the toolbar.

6. Select the location you wish to save file in; modify file name, if desired and select the [**Save**] button.

Additional Learning Opportunities

- Online Learning: To take online course, log into **PACE** (www.pace.state.ma.us/vg).
  - 155 Unit Rate Billing – Part 1
  - 156 Unit Rate Billing – Part 2
  - 159 Manage Enrollment Location
- Additional EIM/ESM Provider Job Aids are found at:
  - Virtual Gateway URL: **www.mass.gov/vg/eimesm**
    - **EIM/ESM Provider User Manuals and Instructional Materials**

EIM/ESM Assistance

- Email the **Virtual Gateway Business Operations Unit** for assistance:
  - **EHS-DL-EIM-ESMBusinessOperations@massmail.state.ma.us**
- Call the **Virtual Gateway Customer Service** for assistance:
  - (800) 421-0938
  - 617-847-6578 (TTY people who are deaf, hard of hearing, or speech disabled)
  - Monday – Friday: 8:30am - 5:00pm