



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.

Current Location: Billing: Service Delivery Report Search

ServiceDeliveryReport
» Claim Search
» Invoice Search
» Accommodation Rate Invoice Search
» Ready Pay Invoice Search
» Explanation of Benefits (EOB)
» Service Delivery Report Search

Service Delivery Reports Search

At least one search criteria must be entered

Contract Number :	<input type="text"/>	Fiscal Year: 2013
PRC/CEC Document ID :	<input type="text"/>	SDR Reference Number : <input type="text"/>
SDR Status:	Select Below <input type="button" value="v"/>	

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

The **Service Delivery Report** page appears.

Current Location: Billing: Service Delivery Report Search > Service Delivery Report

ServiceDeliveryReport
» Service Delivery Report

Service Delivery Report

Contract

* Contract: Filter:

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.

Current Location: Billing: Service Delivery Report Search > Service Delivery Report

ServiceDeliveryReport
» Service Delivery Report

Service Delivery Report

Contract

* Contract: Filter:

Activity Code

* Activity Code:

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Provider Organization: DPH Provider 1004

Payer Organization: Bureau of Substance Abuse Services

Activity Code: Human Service Activity Activity Description: Human Service Activity

Service Periods

Select Month And Year: Select Location:



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

Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary

Service Delivery Report

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Reports

Service Month: November Service Year: 2012 Activity: Human Service Activity

NO SDR Details Found

Add New SDR

- If you receive the message 'No SDR Details Found', select the **[Add New SDR]** button. The page reappears with a Regular SDR [Draft](#) link.
- To begin billing on the SDR, select the [\[Draft\]](#) link.

Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary

Service Delivery Report

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Reports

Service Month: October Service Year: 2012 Activity: Human Service Activity

Status	SDR Type	Submission Date
Draft	Regular	

Display 1 to 1 of 1

Add New SDR

Access an Existing SDR

- Access the **Service Delivery Report Search** page.
- 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 - %.)
- Select the **[Search]** button. The search results appear.

Current Location: Billing: Service Delivery Report Search

Service Delivery Reports Search

Contract Number: %bsas Fiscal Year: 2013

PRC/CEC Document ID: SDR Reference Number:

SDR Status: Select Below

Search Add/Edit SDR

Status	SDR Type	Submission Date	Service Month	Service Year	Activity Name	Contract Number	Contract 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	01/19/2013	July	2012	Human Service Activity	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004

Display 1 to 7 of 7

- Select an SDR. The **Service Delivery Summary** page appears with the roster of clients.

Enter the SDR Reference Number (if applicable)

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



Current Location: Billing: [Service Delivery Report Search](#) > Service Delivery Summary

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Summary

Month:	October	Year:	2012
Submission Date:		Status:	Draft
SDR Type:	Regular		
SDR Reference Number:	October REG 2012	SDR Mode:	Select Below

Save Changes

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.

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

Current Location: Billing: [Service Delivery Report Search](#) > Service Delivery Summary

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Summary

Month:	October	Year:	2012
Submission Date:		Status:	Draft
SDR Type:	Regular		
SDR Reference Number:		SDR Mode:	Select Below

Save Changes

Select Below

- Payment
- Service Reporting

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](http://www.pace.state.ma.us/vg) (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.

Current Location: Billing: [Service Delivery Report Search](#) > Service Delivery Summary

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Summary

Month: October Year: 2012

Submission Date: Status: Draft

SDR Type: Regular

SDR Reference Number: SDR Mode: Select Below

[Save Changes](#)

*Sort By: Client Name Sort Go To Page Containing Client Last Name Starting With: Go

Enrollment Id: 18183	Client Name	Location	Status	Client Id: 253971	Total Days: 31	Total Units: 45	Offset: \$0.00	Voided Units: 0	Total Payable Units: 45	Claimed Total Monthly Amount: \$3,800.00
Provider Location: DPH Provider 1004					Activity/Sub-Activity: 3434 - Human Service Activity		Last Submission Date:		Status: Draft	

- 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:

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



Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary > Service Delivery Summary > Service Delivery Pattern

Service Delivery Pattern

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Service Period: October 2012 Location: DPH Provider 1004

Activity: Human Service Activity

Each Service Delivery Pattern corresponds to a unique Service Delivery Calendar. If you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply service delivery pattern, all fields with the service delivery pattern section must be populated

Core Service Delivery Pattern #1

Pattern Preferences: ☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

Service Code: CR1

Units: 1

Attendance Status: X - Present

☐ Add-on Service ☒ Core Service

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.

- 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 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
<input type="checkbox"/>	Sample, Ann	310589999	18163	253971	
<input checked="" type="checkbox"/>	Sample, Ann	310589999	18743	253971	
<input type="checkbox"/>	Sample, Carmen	999999999	18140	256188	
<input checked="" type="checkbox"/>	Sample, Elton	999999999	18161	451915	
<input type="checkbox"/>	Sample, Frank	999999999	18200	256991	
<input checked="" type="checkbox"/>	Sample, Jay	999999999	18141	261631	
<input type="checkbox"/>	Sample, John	999999999	18121	253940	
<input checked="" type="checkbox"/>	Sample, Max	001349999	18162	253022	
<input type="checkbox"/>	Sample, Olivia	999999999	18122	456404	
<input type="checkbox"/>	Sample, Renee	999999999	18160	256698	
<input checked="" type="checkbox"/>	Sample, Tyra	999999999	18120	261605	
<input type="checkbox"/>	Sample, William	999999999	18301	253890	
<input checked="" type="checkbox"/>	Sample, William	999999999	18741	253890	
<input type="checkbox"/>	Tester, Samuel	999999999	18300	451523	

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:

- Select **Service Delivery Pattern** from the navigation bar.
- 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.
- Select the [**Core Service**] radio button and then select the [**Add**] button. This will add in a



second Core calendar.

Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary > Service Delivery Summary > Service Delivery Pattern

Service Delivery Pattern

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Service Period: October 2012 Location: DPH Provider 1004

*Activity: Select Below

Each Service Delivery Pattern corresponds to a unique Service Delivery Calendar. If you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply service delivery pattern, all fields with the service delivery pattern section must be populated

Core Service Delivery Pattern #1

Pattern Preference: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

☐ Add-on Service ☐ Core Service

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.



Current Location: Billing > Service Delivery Report Search > Service Delivery Summary > Service Delivery Pattern

Service Delivery Pattern

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Month/Period: October 2012 Contract Type: VWP

Service Period: October 2012 Location: SDR Provider 1004

Activity: Human Service Activity

Each Service Delivery Pattern corresponds to a unique Service Delivery Calendar. If you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply service delivery pattern, all fields with the service delivery pattern section must be populated.

Core Service Delivery Pattern #1

Pattern Preference: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Service Code:

Unit(s):

Attendance Status:

Core Service Delivery Pattern #2

Pattern Preference: ☐ Sun ☐ Mon ☒ Tue ☐ Wed ☒ Thu ☐ Fri ☐ Sat

Service Code:

Unit(s):

Attendance Status:

☐ Add-on Service ☒ Core Service

Client Selection

 select all clients (note: at least one client has to be selected before applying pattern) ☐ Include Disenrollment Date

Select	Client Name (Last, First, Middle)	Enrollment ID	Disenrollment ID	Calendar Sequence
<input type="checkbox"/>	Sample, Ann	21000000	18103	252671
<input checked="" type="checkbox"/>	Sample, Ann	21000000	18743	252671
<input checked="" type="checkbox"/>	Sample, Carmen	00000000	18140	258105
<input type="checkbox"/>	Sample, Efton	00000000	18101	451915
<input type="checkbox"/>	Sample, Frank	00000000	18206	245961
<input type="checkbox"/>	Sample, Jay	00000000	18141	261021
<input checked="" type="checkbox"/>	Sample, John	00000000	18121	253940
<input checked="" type="checkbox"/>	Sample, Mike	00134000	18102	253922
<input type="checkbox"/>	Sample, Oline	00000000	18102	454404
<input checked="" type="checkbox"/>	Sample, Renee	00000000	18105	258055
<input checked="" type="checkbox"/>	Sample, Tyra	00000000	18120	261005
<input checked="" type="checkbox"/>	Sample, William	00000000	18101	253950
<input checked="" type="checkbox"/>	Sample, William	00000000	18741	253950
<input checked="" type="checkbox"/>	Tester, Samuel	00000000	18205	451923

Service Codes Key

Service Code	Description
CR3	Core Service - Billing
CR3	Third Core Service - Billing
CR2	Customer Core Service - Billing
ADD	Disenrollment Service

Attendance Status Key

Attendance Status	Description	Attendance Code	Attendance Reason
A	Assembling Reason	CR3	Encounter
A	Attendance	CR3	Encounter

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.



Apply Service Pattern

Select Dates:

Select Service:

Service Code:

Unit(s): Attendance Status:

Core Service Delivery Calendar #2

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 CR2 Draft	2 CR3 Draft	3 -	4 CR3 Draft	5 -	6 -
7 -	8 CR2 Draft	9 CR3 Draft	10 -	11 CR3 Draft	12 -	13 -
14 -	15 CR2 Draft	16 CR3 Draft	17 -	18 CR3 Draft	19 -	20 -
21 -	22 CR2 Draft	23 CR3 Draft	24 -	25 CR3 Draft	26 -	27 -
28 -	29 CR2 Draft	30 -	31 -			

Total Units : 13

☐ Add-on Service ☐ Core Service

[Previous Client](#) [Next Client](#)

Go To Page Containing Client Last Name Starting With:

Service Codes Key

Service Code	Description
CR1	Core Service - training
CR3	Third Core Services - training
CR2	Additional Core Service - training
ADD	Enhancement Service

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.



Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Record Service Delivery

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: Unit

Record Service Delivery for Client #256188 : Carmen Sample - Enrollment Id # 18140

Service Period: October 2012 Location: DPH Provider 1004
 Submission Date: Status: Draft
 Authorization Number: Accounting Line Number:
 Enrollment From: 07/15/2012 Enrollment To: 10/29/2012
 Total Service Days: 20 Total Units: 20
 Voided Units: 0 Total Payable Units: 20
 Fully Offset Claimed Amount: 0
 Offset Amount: 0
 Offset Reason: Select Below
 Offset Start Date: Offset End Date:
 Claimed Total Monthly Amount: \$2,240.00
 Agency Area Office: Bureau of Substance Abuse Services
 Service Item Status: Draft
 Comments:

Go To Page Containing Client Last Name Starting With: Go

[Previous Client](#) [Return to Summary](#) [Next Client](#)

Apply Service Pattern

Select Dates:

Select Service:
 Service Code:
 Unit(s): Attendance Status:

Core Service Delivery Calendar #1

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 CR1 Draft	2 CR1 Draft	3 CR1 Draft	4 CR1 Draft	5 CR1 Draft	6 CR1 Draft	
7 CR1 Draft	8 CR1 Draft	9 CR1 Draft	10 CR1 Draft	11 CR1 Draft	12 CR1 Draft	13 CR1 Draft
14 CR1 Draft	15 CR1 Draft	16 CR1 Draft	17 CR1 Draft	18 CR1 Draft	19 CR1 Draft	20 CR1 Draft
21 CR1 Draft	22 CR1 Draft	23 CR1 Draft	24 CR1 Draft	25 CR1 Draft	26 CR1 Draft	27 CR1 Draft
28 CR1 Draft	29 CR1 Draft	30 CR1 Draft	31 CR1 Draft			
Total Units: 20						

Apply Service Pattern

Select Dates:

Select Service:
 Service Code:
 Unit(s): Attendance Status:

Core Service Delivery Calendar #2

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 CR3 Draft	2 CR3 Draft	3 CR3 Draft	4 CR3 Draft	5 CR3 Draft	6 CR3 Draft	
7 CR3 Draft	8 CR3 Draft	9 CR3 Draft	10 CR3 Draft	11 CR3 Draft	12 CR3 Draft	13 CR3 Draft
14 CR3 Draft	15 CR3 Draft	16 CR3 Draft	17 CR3 Draft	18 CR3 Draft	19 CR3 Draft	20 CR3 Draft
21 CR3 Draft	22 CR3 Draft	23 CR3 Draft	24 CR3 Draft	25 CR3 Draft	26 CR3 Draft	27 CR3 Draft
28 CR3 Draft	29 CR3 Draft	30 CR3 Draft	31 CR3 Draft			
Total Units: 0						

☐ Add-on Service ☐ Core Service

[Previous Client](#) [Return to Summary](#) [Next Client](#)

Go To Page Containing Client Last Name Starting With: Go

Service Codes Key

Service Code	Description
CR1	Core Service - training
CR3	Third Core Service - training
CR2	Additional Core Service - training
ADD	Enhancement Service

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.

Form Type	Form Name	Completion Date
<input type="radio"/>	Initial Employment Supports: Completion	
<input type="radio"/>	Initial Employment Supports: Initiation	
<input type="radio"/>	Intake, Evaluation and Assessment: Completion	
<input type="radio"/>	Intake, Evaluation and Assessment: Initiation	
<input type="radio"/>	Job Development and Placement: Completion	
<input type="radio"/>	Job Development and Placement: Initiation	
<input type="radio"/>	Job-Targeted Educational and Skills Training Activities: Completion	
<input type="radio"/>	Job-Targeted Educational and Skills Training Activities: Initiation	
<input type="radio"/>	Monthly Ongoing Supports	

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.

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Service Delivery Notes

Service Delivery Report

SDR Notes

No SDR Note Information found. Please [add SDR note](#)

*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.

- Enter note. (*See “**Note for CIES Providers**” for guidance on completing this field.)

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Service Delivery Notes > Service Delivery Note Add

Service Delivery Report	Add SDR Note
Service Delivery Summary	
Service Delivery Header	
Service Delivery Pattern	
Notes	

*Note: [Sample of Notes]

Save New SDR Note

**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].

- 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

- Access the **Record Service Delivery** page for a client.
- Enter service delivery information if needed. If changes were made select the [Save Changes] button.
- Select the [Copy Characteristics] button.
- 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)

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

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Record Service Delivery

Service Delivery Report	Contract # 9999BSAS201200001004 - 2013 - CT
Service Delivery Summary	
Service Delivery Header	
Service Delivery Pattern	
Client Form	

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Record Service Delivery for Client #253971 : Ann G. Sample - Enrollment Id # 18163

Service Period: October 2012	Location: DPH Provider 1004
Submission Date:	Status: Draft
Authorization Number:	Accounting Line Number:
Enrollment From: 07/18/2012	Enrollment To: 07/17/2013
Total Service Days: 31	Total Units: 45
Voided Units: 0	Total Payable Units: 45
Fully Offset Claimed Amount: <input type="checkbox"/>	
Offset Amount: 0	Offset Reason: Select Below
Offset Start Date: <input type="text"/>	Offset End Date: <input type="text"/>
Claimed Total Monthly Amount: \$3,800.00	Service Item Status: Draft
Agency Area Office: Bureau of Substance Abuse Services	
Comments:	



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.

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Record Service Delivery

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes
- Client Form

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Record Service Delivery for Client #253971 : Ann G. Sample - Enrollment Id # 18163

Service Period: October 2012	Location: DPH Provider 1004
Submission Date:	Status: Draft
Authorization Number:	Accounting Line Number:
Enrollment From: 07/18/2012	Enrollment To: 07/17/2013
Total Service Days: 31	Total Units: 45
Voided Units: 0	Total Payable Units: 45
Fully Offset Claimed Amount: <input type="checkbox"/>	
Offset Amount: 0	Offset Reason: Select Below
Offset Start Date:	Offset End Date:
Claimed Total Monthly Amount: \$3,800.00	Service Item Status: O-Overpayment T-Payment from other source
Agency Area Office: Bureau of Substance Abuse Services	
Comments:	

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.

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Service Delivery Header

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes

Service Delivery Header

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Service Delivery Header

Provider Organization: DPH Provider 1004	Status: Draft
Vendor Customer Code: dph1004	Activity Code: 3434
Submission Date:	Activity Name: Human Service Activity
SDR Type: Regular	Effective To: 06/30/2013
Address ID: AD001	
Effective From: 07/01/2012	
Payer Organization: Bureau of Substance Abuse Services	
Provider Contact Name:	Agency Contact Name: 2449 Last Name, 2449 First Name
User Name: d phprovider	Associated Organization: DPH Provider 1004
SDR Offset Amount: 0	SDR Offset Reason: Select Below
Date Created: 01/30/2013 11:13 AM	Created By: d phprovider
Date Changed: 02/12/2013 11:13 AM	Changed By: d phprovider

Save Changes

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



Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Service Delivery Header

Service Delivery Report

- > Service Delivery Summary
- > Service Delivery Header
- > Service Delivery Pattern
- > Notes

Service Delivery Header

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Service Delivery Header

Provider Organization: DPH Provider 1004	Status: Draft
Vendor Customer Code: dph1004	Activity Code: 3434
Submission Date:	Activity Name: Human Service Activity
SDR Type: Regular	Effective To: 06/30/2013
Address ID: A0001	
Effective From: 07/01/2012	
Payer Organization: Bureau of Substance Abuse Services	Agency Contact Name: 2449 Last Name, 2449 First Name
Provider Contact Name:	Associated Organization: DPH Provider 1004
User Name: dphprovider	SDR Offset Reason: Select Below
SDR Offset Amount: 0	Created By: Select Below
Date Created: 01/03/2013 11:13 AM	Changed By: 0 - Overpayment
Date Changed: 02/12/2013 11:18 AM	T - Payment from other source

Save Changes

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.

☐ By checking this box, you hereby confirm that by clicking the "Authorize" or "Release" button below, you are providing data that is complete and accurate in all respects, and that you have been given authority by your organization to submit such data through EIM. If after submission of this record you determine that it is incorrect, you can submit a supplemental transaction to correct it. Please see the user guide for instructions on submitting supplemental transactions. You also acknowledge that it is not the intent of your organization to bill for any services that would result in payments exceeding the contracted amount. In such instances, the service data marked as "Claimed" is intended for reporting purposes only.

Display Totals Unlock All Enrollments Release Service Delivery Delete SDR

Claimed Grand Total Amount:	Claimed Grand Total Units:	Claimed Grand Total Payable Units:	Claimed Grand Total Days:
Paid Grand Total Amount:		Paid Grand Total Payable Units:	

☐ Only Clients with Delivered Services
☐ Only Clients with No Delivered Services
☒ All Clients

Print SDR

Display 1 to 10 of 12 | Next Set >> | page 1 of 2 GO

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

Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary

Service Delivery Report

- > Service Delivery Report Summary

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Reports

Service Month: October Service Year: 2012 Activity: Human Service Activity

Status	SDR Type	Submission Date
Draft	Regular	

Display 1 to 1 of 1

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.

☒ By checking this box, you hereby confirm that by clicking the "Authorize" or "Release" button below, you are providing data that is complete and accurate in all respects, and that you have been given authority by your organization to submit such data through EIM. If after submission of this record you determine that it is incorrect, you can submit a supplemental transaction to correct it. Please see the user guide for instructions on submitting supplemental transactions. You also acknowledge that it is not the intent of your organization to bill for any services that would result in payments exceeding the contracted amount. In such instances, the service data marked as "Claimed" is intended for reporting purposes only.

[Display Totals](#) [Unlock All Enrollments](#) [Release Service Delivery](#) [Delete SDR](#)

Claimed Grand Total Amount:	Claimed Grand Total Units:	Claimed Grand Total Payable Units:	Claimed Grand Total Days:
Paid Grand Total Amount:		Paid Grand Total Payable Units:	

☐ Only Clients with Delivered Services
☐ Only Clients with No Delivered Services
☒ All Clients

[Print SDR](#)

| Display 1 to 10 of 12 | Next Set >> | page 1 of 2 [GO](#)

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.

Current Location: Billing: Service Delivery Report Search > Service Delivery Report Summary > Service Delivery Release Progress

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes

Contract #9999BSAS201200001004 - 2013 - CT

Service Delivery Report Release Progress Status

The SDR release process is underway. While it finishes, you may access other EIM/ESM features. Upon returning to this page the progress complete will display or, if the release is completed, the SDR will appear.

SDR Release progress Status 58%

[Check SDR Release Status](#)

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.

☐ By checking this box, you hereby confirm that by clicking the "Authorize" or "Release" button below, you are providing data that is complete and accurate in all respects, and that you have been given authority by your organization to submit such data through EIM. If after submission of this record you determine that it is incorrect, you can submit a supplemental transaction to correct it. Please see the user guide for instructions on submitting supplemental transactions. You also acknowledge that it is not the intent of your organization to bill for any services that would result in payments exceeding the contracted amount. In such instances, the service data marked as "Claimed" is intended for reporting purposes only.

[Display Totals](#) [Unlock All Enrollments](#) [Release Service Delivery](#) [Delete SDR](#)

Claimed Grand Total Amount:	\$38,795.00	Claimed Grand Total Units:	528.00	Claimed Grand Total Payable Units:	528.00	Claimed Grand Total Days:	352
Paid Grand Total Amount:	\$0.00			Paid Grand Total Payable Units:	0		

☐ Only Clients with Delivered Services
☐ Only Clients with No Delivered Services
☒ All Clients

[Print SDR](#)

| Display 1 to 10 of 12 | Next Set >> | page 1 of 2 [GO](#)

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.



<input checked="" type="checkbox"/> By checking this box, you hereby confirm that by clicking the "Authorize" or "Release" button below, you are providing data that is complete and accurate in all respects, and that you have been given authority by your organization to submit such data through EIM. If after submission of this record you determine that it is incorrect, you can submit a supplemental transaction to correct it. Please see the user guide for instructions on submitting supplemental transactions. You also acknowledge that it is not the intent of your organization to bill for any services that would result in payments exceeding the contracted amount. In such instances, the service data marked as "Claimed" is intended for reporting purposes only.									
Authorize Service Delivery		Release Service Delivery		Disapprove Service Delivery		Display Totals		Unlock All Enrollments	
Claimed Grand Total Amount:		Claimed Grand Total Units:		Claimed Grand Total Payable Units:		Claimed Grand Total Days:			
Paid Grand Total Amount:				Paid Grand Total Payable Units:					
<input type="radio"/> Only Clients with Delivered Services						Print SDR			
<input type="radio"/> Only Clients with No Delivered Services									
<input checked="" type="radio"/> All Clients									
Display 1 to 10 of 12 Next Set >> page 1 of 2 GO									

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.*

Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary

Service Delivery Report		
» Service Delivery Report Summary		

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Reports

Service Month: July	Service Year: 2012	Activity: Human Service Activity
Status	SDR Type	Submission Date
Partially Passed	Regular	01/18/2013
Draft	Supplemental	

| Display 1 to 2 of 2 |

[Add New SDR](#)

3. Select the [Draft](#) link. *The **Service Delivery Summary** page appears with a roster of clients.*

Current Location: Billing: Service Delivery Report Search > Service Delivery Report > Service Delivery Report Summary > Service Delivery Summary

Service Delivery Report		
» Service Delivery Summary		
» Service Delivery Header		
» Service Delivery Pattern		
» Notes		

Contract #9999BSAS201200001004 - 2013 - CT - DPH Provider 1004

Service Delivery Summary

Month: July	Year: 2012
Submission Date:	Status: Draft
SDR Type: Supplemental	
SDR Reference Number:	SDR Mode: Select Below

[Save Changes](#)

*Sort By: [Client Name](#) [Sort](#) Go To Page Containing Client Last Name Starting With: [Go](#)

Enrollment Id: 18162	Sample, Ann	Client Id: 253971	Total Days: 0	Total Units: 0	Offset: \$0.00	Voided Units: 0	Total Payable Units: 0	Claimed Total Monthly Amount: \$0.00																							
Provider Location: DPH Provider 1004		Activity/Sub-Activity: 3434 - Human Service Activity		Last Submission Date: 01/18/2013		Status: Draft																									
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



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.

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary > Record Service Delivery

Service Delivery Report

- Service Delivery Summary
- Service Delivery Header
- Service Delivery Pattern
- Notes
- Client Form

Contract # 9999BSAS201200001004 - 2013 - CT

Contract Identifier/Number: 9999BSAS201200001004 - 2013 - CT Contract Type: UNIT

Record Service Delivery for Client #253971 : Ann G. Sample - Enrollment Id # 18163

Service Period: July 2012	Location: DPH Provider 1004
Submission Date:	Status: Draft
Authorization Number:	Accounting Line Number:
Enrollment From: 07/18/2012	Enrollment To: 07/17/2013
Total Service Days: 0	Total Units: 0
Voided Units: 0	Total Payable Units: 0
Fully Offset Claimed Amount: <input type="checkbox"/>	
Offset Amount: 0	Offset Reason: Select Below
Offset Start Date: <input type="text"/>	Offset End Date: <input type="text"/>
Claimed Total Monthly Amount: \$0.00	Service Item Status: Draft
Agency Area Office: Bureau of Substance Abuse Services	
Comments: <input type="text"/>	

[View Previous Service Delivery Reports](#)

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

Previous Service Delivery Reports

Status: Passed	Total Days: 14	Total Units: 14	Voided Units: 0	Total Payable Units: 14	Claimed Total monthly amount: \$1,400.00	Submission Date: 01/18/2013
--------------------------------	----------------	-----------------	-----------------	-------------------------	--	-----------------------------

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
<input type="radio"/> BD																		X1	X1	X1	X1	X1	X1	X1	X1	X1	X1	X1	X1	X1	

[Save Changes](#) [Copy](#) [Void](#)

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.

☐ By checking this box, you hereby confirm that by clicking the "Authorize" or "Release" button below, you are providing data that is complete and accurate in all respects, and that you have been given authority by your organization to submit such data through EIM. If after submission of this record you determine that it is incorrect, you can submit a supplemental transaction to correct it. Please see the user guide for instructions on submitting supplemental transactions. You also acknowledge that it is not the intent of your organization to bill for any services that would result in payments exceeding the contracted amount. In such instances, the service data marked as "Claimed" is intended for reporting purposes only.

[Display Totals](#) [Unlock All Enrollments](#) [Release Service Delivery](#) [Delete SDR](#)

Claimed Grand Total Amount:	Claimed Grand Total Units:	Claimed Grand Total Payable Units:	Claimed Grand Total Days:
Paid Grand Total Amount:		Paid Grand Total Payable Units:	

☐ Only Clients with Delivered Services
☐ Only Clients with No Delivered Services
☒ All Clients

[Print SDR](#)

| Display 1 to 10 of 23 | Next Set >> | page 1 of 3 [GO](#)

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

Current Location: Billing: Service Delivery Report Search > Service Delivery Summary

Service Delivery Report

- » Service Delivery Summary
- » Service Delivery Header
- » Service Delivery Pattern
- » Notes

Confirm SDR Deletion

Are you sure you want to delete this SDR? Please click "Confirm Delete" to delete the record or "Cancel Delete" to cancel the operation.

[Confirm Delete](#) [Cancel Delete](#)

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.

Current Location: Billing: PRC/CEC Search

PRC/CEC Search

Billing

- » Claim Search
- » PRC/CEC Search
- » Invoice Search
- » Accommodation Rate Invoice Search
- » Ready Pay Invoice Search
- » Re-adjudicate Service Lines
- » Global Update Appropriations
- » Explanation of Benefits (EOB)
- » Service Delivery Report Search

Contract Number: Fiscal Year: 2013

Activity Code: Activity Name: Human Service Activity

Provider Name: Vendor Customer Code:

Agency Name:

Service Date From: 07/01/2012 Service Date To: 09/30/2012

PRC/CEC Document ID: Invoice/SDR Reference Number: [Select Below](#)

PRC/CEC Status: [Select Below](#)

Unit Code:

[Search](#)

Search Results

PRC/CEC Document ID	Contract Number	Provider Name	Activity Code	Service Date From	Service Date To	Create Date	PRC/CEC Status	Amount
[N772348130000000001]	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004	3434	09/01/2012	09/30/2012	01/24/2013	PRCReady	\$28,520.00
[N772348130000000002]	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004	3434	08/01/2012	08/31/2012	01/24/2013	PRCReady	\$41,210.00
[N772348130000000003]	9999BSAS201200001004 - 2013 - CT	DPH Provider 1004	3434	07/01/2012	07/31/2012	01/24/2013	PRCReady	\$28,050.00



5. Select the [Activity Name](#) link. *The **Update PRC** page appears to view payment information.*

Current Location: Billing: PRC/CEC Search > PRC/CEC Update

Update PRC/CEC

PRC/CEC Document Information

Document Code: PRC	Department Code: DPH
Unit Code: 2345	Invoice/SDR Reference Number:
Document ID: INTF2348130000000003	Document Version Number: 1
Document Import Mode: OE	Provider Name: DPH Provider 1004
Document Vendor Line Number: 1	Vendor Customer Code: dph1004
Address Code: AD001	Contract Number: 99998SA5201200001004 - 2013 - CT
*Scheduled Pmt Date: 01/24/2013	Accounting Period Number:
*Record Date: 01/24/2013	*Vendor PRC/CEC Date: 01/24/2013
Vendor PRC/CEC Number: INTF2348130000000003	Fiscal Year: 2013
Budget Fiscal Year: 2013	PRC/CEC Status: PRCReady
MMARS EFT/Check Number:	
Document Total Amount: \$28,050.00	

Report Links

[Print SDR](#) [Print SDR DI](#)

Commodity Accounting Line Information

Commodity Line	Accounting Line	Total Amount
2	1	\$28,050.00

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. If you only want to see clients with delivered services or clients with



Current Location: [Reports](#) > Reports

Reports

» Report

ESM Reports

[Client Enrollment Status](#)
[Clients with Incomplete Data](#)

System Assurance Reports

Note:

The reports are generated in Adobe PDF and Microsoft Excel format.
[Click here to download free Acrobat Reader](#) to view PDF files.
[Click here to download Microsoft's free Excel Viewer](#) to view Excel file.

EIM Reports

[Activity PRC Details by Sub-Activity](#)
[Commodity Based Payment Request](#)
[Cost Reimbursement Budget](#)
[Cost Reimbursement Expenditure Analysis](#)
[Cost Reimbursement Invoice](#)
[Payment Detail Report by Bed Days](#)
[Payment Detail By Client Report](#)
[Payment Tracking Report](#)
[Ready Pay Contract Reconciliation Report](#)
[Remittance Advice by Bed Days](#)
[Remittance Advice by Service Code](#)
[Service Delivery Report](#)
[Services not Reimbursed with a Claim or Have an Error](#)

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

Current Location: [Reports](#) > Service Delivery Report

SDR - Service Delivery Report

*Contract/Credential Number: 9999BSAS201200001004 - 2013 - CT Filter: 999909as%

*Activity Code: 3434 - Human Service Activity

*SDR Month: July

*SDR: Regular | Partially Passed

*Clients to Include:
☐ Only Clients with Delivered Services
☐ Only Clients with No Delivered Services
☒ All Clients

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.

Print SDR In Progress

The Print SDR process is underway. While it finishes, you may access other EIM/ESM features in your other browser window. When the Print SDR process has completed this page will automatically refresh with the completed 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:

SAMPLE

Claimed Grand Total Amount: \$28,279.00	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	X	X	X	X	X	X	X	X	X	X	X	X	X

Enrollment Id: 18081	Sample, Bob	Client Id: 466582	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	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	

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.

5. 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.

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