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 <u>PACE</u>.

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 Repo	ort Search			
ServiceDeliveryReport	Service Delivery Reports Se	earch		
» Claim Search				
» Invoice Search				
» Accommodation Rate Invoice Search	At least one search criteria must be entered			
» Ready Pay Invoice Search	Contract Number :		Fiscal Year:	2013
» Explanation of Benefits (EOB)	PRC/CEC Document ID :		SDR Reference Number :	
» Service Delivery Report Search				
	SDR Status:	Select Below		
				Search Add/Edit SDR

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

The Service Delivery Report page appears.

(Current Location: Billing: Service Delivery Repo	rt Search > Service Delivery Report
S	erviceDeliveryReport	Service Delivery Report
э	Service Delivery Report	Contract
		Contract: Select Below Select Contract Filter: 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.

ServiceDeliveryReport	Service Delivery I	Report	
» Service Delivery Report	Contract	•	
	Contract		
	* C	iontract: 9999BSAS201200001004 - 2013 - CT 💌 Select	Contract Filter: Filter
	Activity Code		
	*Activit	ty Code: 3434 - Human Service Activity 💙 Select Activity	
	Contract Identifier/I	Number: 999985AS201200001004 - 2013 - CT	Contract Type: UNIT
	Provider Organ	nization: DPH Provider 1004	
	Payer Organ	nization: Bureau of Substance Abuse Services	
	Activit	ty Code: Human Service Activity	Activity Description: Human Service Activity
	Service Periods		
	Select Month Ar	Vear luk 2012 V	View Service Period

 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 Vear: 2012 Activity: Human Service Activity

 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.

» Service Delivery Report Summary	Service Delivery Reports	04 - 2013 - CT - DPH Provider 100	4
[Service Month: October	Service Year: 2012	Activity : Human Service Activity
	Status Draft	SDR Type Regular	Submission Date
	Display 1 to 1 of 1		

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.

ervicebeliverykeport	Service D	elivery Re	eports Se	earch				
Claim Search								
nvoice Search								
ccommodation Rate Invoice Search		Cor	ntract Number :	%bsas			Fiscal Year: 2013	3
eady Pay Invoice Search		PROICEC	Document ID :				SDP Reference Number	
xplanation of Benefits (EOB)		PRO/OEC	, bocument ib.					
ervice Delivery Report Search			SDR Status:	Select Below	*			
	<u>Status</u>	SOR Type	Submission Date	Service Month	Service Year	Activity Name	Contract Number	Contracting Provider Name
	<u>Status</u> Partially Passed	SDR Type Regular	Submission Date 01/21/2013	Service Month August	Service Year 2012	Activity Name Human Service Activity	Contract Number 9999BSAS201200001004 - 2013 - CT	Contracting Provider Name DPH Provider 1004
	Status Partially Passed Draft	SDR Type Regular Supplemental	Submission Date 01/21/2013	Service Month August August	Service Year 2012 2012	Activity Name Human Service Activity Human Service Activity	Contract Number 9999BSAS201200001004 - 2013 - CT 9999BSAS201200001004 - 2013 - CT	Contracting Provider Name DPH Provider 1004 DPH Provider 1004
	Status Partially Passed Draft Partially Released	SDR Type Regular Supplemental Supplemental	Submission Date 01/21/2013	Service Month August August September	Service Year 2012 2012 2012	Activity Name Human Service Activity Human Service Activity Human Service Activity	Contract Number 9999BSAS201200001004 - 2013 - CT 9999BSAS201200001004 - 2013 - CT 9999BSAS201200001004 - 2013 - CT	Contracting Provider Name DPH Provider 1004 DPH Provider 1004 DPH Provider 1004
	Status Partially Passed Draft Partially Released Partially Passed	SDR Type Regular Supplemental Supplemental Regular	Submission Date 01/21/2013 01/21/2013 01/21/2013	Service Month August August September September	Service Year 2012 2012 2012 2012 2012	Activity Name Human Service Activity Human Service Activity Human Service Activity Human Service Activity	Contract Number 999985AS201200001004 - 2013 - CT 999985AS201200001004 - 2013 - CT 999985AS201200001004 - 2013 - CT 999985AS201200001004 - 2013 - CT	Contracting Provider Name DPH Provider 1004 DPH Provider 1004 DPH Provider 1004 DPH Provider 1004
	Status Partially Passed Draft Partially Released Partially Passed Draft	SDR Type Regular Supplemental Supplemental Regular Regular	Submission Date 01/21/2013 01/21/2013 01/21/2013	Service Month August August September September October	Service Year 2012 2012 2012 2012 2012 2012 2012 2012	Activity Name Human Service Activity Human Service Activity Human Service Activity Human Service Activity Human Service Activity	Contract Number 999985A5201200001004 - 2013 - CT 999985A5201200001004 - 2013 - CT 999985A5201200001004 - 2013 - CT 989985A5201200001004 - 2013 - CT	Contracting Provider Name DPH Provider 1004
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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.



	Current Location: Billing: Service Delivery Rep	Country of Honorope Accord 20000000 2012	NL Drevider 4004
	service Delivery Report service Delivery Summary	Contract #9999BSAS201200001004 - 2013 - CT - DF	H Provider 1004
	» Service Delivery Header » Service Delivery Pattern	Service Delivery Summary	Year: 2012
	» Notes	Submission Date:	Status: Draft
		SDR Type: Regular SDR Reference Number: October REG 2012	SDR Mode: Select Below
			Save Changes
Im	portant Notes:		
•	The SDR Referer	nce Number may only be edited whe	en the SDR is in Draft status.
•	The SDR Referen payment status. the <u>Status Job Ai</u>	nce Number may be used to conduc To learn more, consult the <u>Payment</u> d helpful.	t a PRC search and determine <u>Tracking Job Aid</u> . You might also find
Ente	er the SDR N	lode (Required for DMH Community	Based Flexible Supports providers only)
The SI Suppo	DR Mode is a <u>requ</u> rts contracts with t	<u>iired</u> field for providers who are part he Department of Mental Health. <u>Al</u>	of the Community Based Flexible I other providers may ignore this field.
1.	Access the Servi	ce Delivery Summary page.	
2.	Enter the [SDR M	ode]:	
	Payment	for invoicing	
	Service R	eporting for claiming	
3.	Select the [Save	Changes] button.	
	Current Location: Billing: Service Delivery Rep	ort Search > Service Delivery Summary	
	Service Delivery Report	Contract #9999BSAS201200001004 - 2013 - CT - DE	PH Provider 1004
	» Service Delivery Summary	Sonrico Dolivory Summary	
	» Service Delivery Header » Service Delivery Pattern	Month: October	Year: 2012
	» Notes	Submission Date:	Status: Draft
		SDR Reference Number:	SDR Mode: Select Below
			Select Below Save Changes Payment Service Reporting
Rec	ord 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 <u>PACE</u> (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.

Service Delivery Report	Contract #9999BSAS201	200001004 - 201	3 - CT - D	PH Provid	der 1004				
 » Service Delivery Summary » Service Delivery Header 	Service Delivery Summary								
» Service Delivery Pattern	Month: Octob	er				Year	: 2012		
» Notes	Submission Date:					Status	: Draft		
	SDR Type: Regul	ar							
	SDR Reference Number:					SDR Mode	: Select Below	*	
	*Sort By: Cleat	t Name 🔽 Sort) Go To Pag	ge Containing Clien	t Last Name Start	ing With:		Go	2	ave Changes
	Loca Statu Cient Enrollment Id: <u>18163</u> Enroll	tion s Id iment Id	Client Id: 253971	Total Days: 31	Total Units: 45	Offset: \$0.00	Voided Units: 0	Total Payable Units: 45	Claimed Tot Month Amount \$3,800.0

- 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.
- 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.

Service Delivery Report	Service Delivery Pattern	
» Service Delivery Summary » Service Delivery Header	Contract # 9999BSAS201200001004 - 2013 -	СТ
» Service Delivery Pattern » Notes	Contract Identifier/Number: 99998SAS201200001004 - 2013 - CT	Contract Type: UNIT
	Service Period: October 2012	Location: DPH Provider 1004
	*Activity Human Service Activity Muman Service Activity Muman Service Delivery Pattern corresponds to a unique Service Delivery Calendar. It delivery pattern, all fields with the service delivery pattern section must be pooul	Select Activity I you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply ser ted
	*Activity Human Service Activity Muman Service Activity Muman Service Delivery Calendar. It delivery pattern, all fields with the service delivery pattern section must be popula Core Service Delivery Pattern #1	Select Activity I you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply ser ted
	Activity Human Service Activity Muman Service Activity Each Service Delivery Pattern corresponds to a unique Service Delivery Calendar, I delivery pattern, all fields with the service delivery pattern section must be popula Core Service Delivery Pattern #1 Pattern Preference: Sun Mon Tue Wed	Select Activity I you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply serviced I' thu V' Fri Sat Select All
	Activity Human Service Activity Human Service Activity Each Service Delivery Pattern corresponds to a unique Service Delivery Calendar, I delivery pattern, all fields with the service delivery pattern section must be popula Core Service Delivery Pattern #1 Pattern Preference: Sun Mon Tue Service Code: CR1 Sett	Select Activity f you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply serviced Thu IV Fri Sat Select All
	Activity Human Service Activity Human Service Activity Each Service Delivery Pattern corresponds to a unique Service Delivery Calendar. I delivery pattern, all fields with the service delivery pattern section must be popula Core Service Delivery Pattern #1 Pattern Preference: Sun Mon Tue Service Code: Cott Service Units:	Select Activity I you do not want to change any of the services on an existing calendar, please leave all fields blank. To apply serviced I thu IV Fri Sat Select AL

- 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	client has to be select	ed before Applying pattern) 🔲 In	clude 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	
V	Sample, Elton	999999999	18161	451915	
	Sample, Frank	999999999	18200	256991	
~	Sample, Jay	999999999	18141	261631	
	Sample, John	999999999	18121	253940	
V	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.
- 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

elivery Report	Service Delivery Patte	ern		
Delivery Summary Delivery Header Delivery Pattern	Contract # 9999BSAS	201200001004 - 2013 - CT		
	Contract Identifier/Number:	9999BSAS201200001004 - 2013 - CT	Contract Type: UNIT	
	Service Period:	October 2012	Location: DPH F	Provider 1004
	*Activity	Select Below Select A	stivity	
	Each Service Delivery Pattern correspon delivery pattern, all fields with the servi Core Service Delivery Pa	ds to a unique Service Delivery Calendar. If you do n ce delivery pattern section must be populated ttern #1	ot want to change any of the services on an existing calendar.	please leave all fields blank. To apply se

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.



	301	vice Delive	ry Pattern				
> Bervice Delivery Summary							
a Service Delivery Header	Cor	mact # 995	9B5A5201200001	004 - 2013	- 01		
+ Hotes		Contract liters	Ther Incoder \$25585A520125000	1004 - 2013 - CT		Carrie	of Type: UNIT
			advice Periodi Ontober 2012			h.	mattern DPH Provider 1004
			"Astroity Human Service Actin	vey 💌	Select Activity		
	Each Se	y pattern, all fields	im corresponds to a unique Service delivery pattern i	ice Delivery Calenda section must be pop	r. If you do not want to o ulated	change any of the services on an exis	iting calendar, please leave all fields blank. To apply service
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			Service Coder Select Beller	Select			
			United				
		Atten	daitce Statua: Select Below 🐭				
	Core	Service De	livery Pattern #2				
		Patter	n Protoronom D Sun D Man	121 Time 121 West	E Thu E Fo E	Bat Semilal	
			Service Code: CR3	Select		Contraction of the second s	
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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	Core Servic	e Delivery Cal	endar #2				
Select Dates	Sunday	Monday	Tuesday	🔲 Wednesday	Thursday	E Friday	Saturday
Select All Deselect All		□ 1 1 N ♥ CB2 Draft	2 1 A ~ CB3 Draft	3	4 1 A V CR3 Draft	5	6
Select Service Service Code: Select S	t 7	8 CR2 Draft	9 1 A V CR3 Draft	□ 10 □ - ❤	II CR3 Draft	12	□ 13 □ • ♥
Unit(s): Attendance Status: Appl		□ 15 1 N ♥ CR2 Draft	16 A CR3 Draft	□ 17 □ - ¥	18 A CR3 Draft	□ 19 □ - ▼	20
	21	22 1 N V CR2 Draft	23 1 A V CR3 Draft	24	25 1 A V CR3 Draft	26	27
	28	29 1 N V CR2 Draft	30	31			
	Total Units: 13					Clear Selected	Clear All
Add-on Service Core Service Add-on Service	1		Save	& View Previous Clier	nt Save Chai	C Save	opy Characteristics & View Next Client
Go To Page Containing Client Last Name St	arting With:	Go		Previous C	Client Retur	n to Summary	Next Client
Service Codes Key							
Service Code De	scription						
CR1 Con	e Service - training						
CR3 Thi	rd Core Servies -t raining						
CR2 Ad	ditonal Core Service - trainin	g					
ADD Ent	ancement 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.



and a second sec	Contract # 9999B	5A5201	200001004 -	2013 - CT					
Service Delivery Summary	Contract Identifierth	umber: sssss	SAS201200001004 - 2013	- CT			Contract Type: UNP		
Service Delivery Pattern	Record Service Delivery for Client #256188 - Carmen Sample - Encolment Id # 18440								
Notes	Record Service Delivery for Client #256188 : Carmen Sample - Enfoliment Id # 18140								
Client Form	Service Period: October 2012				Location: DPH Provider 1004				
	Submissio	Submission Date:					Status: Oraft		
	Authorization Number:					Accounting Line N	umber:		
	Total Servic	e Dava: 20	evia			Tota	al Unita: 28		
	Voideo	Units: 0			Total Payable Units: 28				
	Fully Offset Claimed A	mount: 🔲							
	Offset A	mount: 0				Offset F	Reason: Select Below	~	
	Offset Sta	rt Date:				Offset Er	nd Date:		
	Claimed Total Monthly A	mount: \$2,240	0.00			Service Item	Status: Draft	1000	
	Agency Area	Office: Burea	u of Substance Abuse Ser	vices					
	Com	ments:							2 12
	Go To Page Containing Client Las	it Name Starti	ng With:	Go					
	Apply Social Pattor		Coro Sondoo	Dollyony Cal	onder #1	Previous (Client Retu	rn to Summary	Next Client
	Apply Service Patter		COLE SELVICE	Derivery Cal	endar #1		al and the second second second	all and the second	Contraction of the second
	Seneci Unitar		Sunday	Montagy	Tuesday	Wednesday	Thursday	Friday	Saturday
	Deselect AI			1	2	3	4	5	6
	Select Service			CR1 Draft	CR1 Draft	CR1 Draft	CR1 Drah	CR1 Draft	
	Service Code:	-	7	0	9	E 10	11	12	13
	-	Select		1 X 🕶	1 X 🕶	1 X 💌	t 🛛 🗙 🕶	1 X 💌	
	Unit(s): Attendance			CR1 Draft	CR1 Draft	CR1 Draft	CR1 Draft	CR1 Draft	
	Statue	Apply	- 14	16 1 X ¥	1 16	17 1 X ¥	1 X ¥	19 1 X ¥	20
			21	CR1 Draft	CR1 Draft	CR1 Draft	CR1 Draft	CR1 Draft	27
			- 🛩	1 × 🛩	1 × 💌	t 🗙 🛩	1 × •	1 X 🛩	
			1	CR1 Draft	CR1 Draft	CR1 Draft	CR1 Draft	CR1 Draft	
			28	29	30	31			
			Total Units : 20					Clear Selected	Clear Al
	Apply Service Patter	n	Core Service	Delivery Cal	endar #2				
	Apply Service Futter		Core Service	Denvery ca	C C	-	100	-	
	action value		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Select All Deselect All								- <u>-</u>
	Select Service				CR3 Draft		GR3 Draft		
	Service Code:	Select		M		10		- 12	· · ·
	Unit(s): Altentance				CH3 Draft	-	CH3 Draft		
	Status - M	Apply .		-				· · ·	
	A.		21	22	23	24	25	26	27
			- M		CR3 Draft		CR3 Draft		
			20	29	20	31			
			Total Units : 0					Clear Selected	Clear Al
	O anti-on Samuel O commen	Add							opy Characteristics
	U Aco-on service U core Ser	me (nod)			Sav	e & View Previous Clie	int Save Ch	anges Save	& View Next Client
						Previous 0	Client Retu	rn to Summary	Next Client
	Go To Page Containing Client Las	it Name Starti	ng With:	Go					
	Go To Page Containing Client Las Service Codes Key	st Name Starti	ing With:	Go					
	Go To Page Containing Client Lat Service Codes Key Service Code CR1	t Name Starti Descr Core S	ng With:	Go					
	Go To Page Containing Client Las Service Codes Key Service Code CR1 CR3	st Name Starti Occur Core S Third C	ng With:	[Ge					

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.

Service Delivery Report	Client #262769 :						
» Service Delivery Summary							
» Service Delivery Header	SDR Client Forms						
» Service Delivery Pattern	Form Type Form Name	Completion Date					
» Notes » Client Form	O Initial Employment Supports: Completion						
,	O Initial Employment Supports: Initiation						
	C Intake, Evaluation and Assessment: Completion						
	O Intake, Evaluation and Assessment: Initiation						
	O Job Development and Placement: Completion						
	O Job Development and Placement: Initiation						
	O Job-Targeted Educational and Skills Training Activities: Completion						
	O Job-Targeted Educational and Skills Training Activities: Initiation						
	C Monthly Ongoing Supports						
		Review Form Create Form Edit Form					

- 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 Deliv	very Report Search > Service Delivery Summary > Service Delivery Notes
Service Delivery Report	SDR Notes
» Service Delivery Summary	ODITIONS
» Service Delivery Header	No SDR Note Information found. Please add SDR note
» Service Delivery Pattern	
» Notes	

The Service Delivery Notes page appears.

3. Click Add SDR note link if no SDR information was found or [Add SDR Note].



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

Current Location: Billing: Service Delive	very Report Search > Service Delivery Summary > Service Delivery Hotes > Service Delivery Hote Add	
Service Delivery Report	Add SDR Note	
» Service Delivery Summary		
» Service Delivery Header	"Note: Sample of Notes	~
» Service Delivery Pattern		
» 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].

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.

Service Delivery Report	Contract # 9999BSAS	201200001004 - 2013 - CT					
» Service Delivery Summary	•						
» Service Delivery Header	Contract Identifier/Number:	9999BSAS201200001004 - 2013 - CT	Contract	t Type: UNIT			
» Service Delivery Pattern	Record Service Delivery f	or Client #253971 : Ann G. Sample - E	nrollment Id # 18163				
» Notes	Record Service Derivery I	Record Corvice Derivery for Great #250071 . Ann C. Cample - Enforment fur # 10105					
» Client Form	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:						
	Offset Amount:	0	Offset Reason:	Select Below			
	Offset Start Date:		Offset End Date:				
	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 > Re	cord Service Delivery					
Service Delivery Report	Contract # 9999BSAS	201200001004	- 2013 - CT				
Service Delivery Summary Service Delivery Header	Contract Identifier/Number:	99998545201200001004 - 2	013 - CT	Contrac	Type: UNIT		
» Service Delivery Pattern » Notes	Record Service Delivery for Client #253971 : Ann G. Sample - Enrollment Id # 18163						
» chentronn	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:						
	Offset Amount:	0		Offset Reason:	Select Below		
	Offset Start Date:			Offset End Date:	Select Below		
	Claimed Total Monthly Amount:	\$3,800.00		Service Item Status:	0-Overpayment		
	Agency Area Office:	Bureau of Substance Abuse	Services		I-Payment from other source		
	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.

ice Delivery Report	Service Delivery Head	er							
rvice Delivery Summary									
rvice Delivery Header	Contract # 9999BSAS	201200001004 - 2013 - CT							
rvice Delivery Pattern									
tes	Contract Identifier/Number:	9999BSAS201200001004 - 2013 - CT	Contract Type:	UNIT					
	Provider Organization:	DPH Provider 1004							
	Service Delivery Header								
	Vendor Customer Code:	Vendor Customer Code: dph1004							
	Submission Date:		Status:	Draft					
	SDR Type:	Regular	Activity Code:	3434					
	Address ID:	AD001	Activity Name:	Human Service Activity					
	Effective From:	07/01/2012	Effective To:	06/30/2013					
	Payer Organization:	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 11:18 AM	Changed By:	d phprovider					

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

vice Delivery Report	Service Delivery Head	ler		
ervice Delivery Summary ervice Delivery Header ervice Delivery Pattern	Contract # 9999BSAS	201200001004 - 2013 - CT		
* Notes	Contract Identifier/Number:	9999BSAS201200001004 - 2013 - CT	Contract Type:	UNIT
	Service Delivery Header Provider Organization:	DPH Provider 1004		
	Vendor Customer Code: Submission Date:	dph1004	Status:	Draft
	SDR Type:	Regular	Activity Code:	3434
	Address ID:	AD001	Activity Name:	Human Service Activity
	Effective From:	07/01/2012	Effective To:	06/30/2013
	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:	Select Below
	Date Changed:	02/12/2013 11·18 AM	Changed By:	0.0

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.

	a is intended for reporting purposes only.	Display Totals	Unlock All Enrollments	Release Service De	livery Delete
Claimed Grand Total Amount:	Claimed Grand Total Units:		Claimed Grand Total Payable Units:	Claimed Grand To	otal Days:
id Grand Total Amount:		Pai	d Grand Total Payable Units:		
		Only Clients wi	th Delivered Services		
		Only Clients wi	th No Delivered Services		Print SDR
		All Clients			

The Service Delivery Report Summary page appears.

Current Location: Billing: Service Delivery Repo	t search / service beivery keport / service beivery keport 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 your organization to subn on submitting supplement the service data marked a	u hereby confirm that by cl mit such data through EIM. I al transactions. You also a as "Claimed" is intended for	cking the "Authorize" or "Release" f after submission of this record y cknowledge that it is not the inten reporting purposes only.	' button below, you ar ou determine that it is t of your organization	e providi incorrec to bill for	ing data that is complete t, you can submit a supj any services that wou	and accurate in plemental transac Id result in payme	all respects, and that you ha tion to correct it. Please see ents exceeding the contracte	ve been giv the user gu d amount. Ir	en authority by ide for instructio n such instances
·			Display To	tals	Unlock All Enro	Ilments	Release Service Del	ivery	Delete SDR
Claimed Grand Total Amount:		Claimed Grand Total Units:		(Claimed Grand Total Payable Units:		Claimed Grand Tot	al Days:	
Paid Grand Total Amount:				Paid	Grand Total Payable Units:				
			Only Clie Only Clie	nts witl nts witl	n Delivered Services n No Delivered Servic	es		Prin	t SDR
			All Client	s					
isplay 1 to 10 of 12 Next Set \gg	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 Repo	vrt Search > Service Delivery Report Summary > Service Delivery Release Progress
Service Delivery Report	Contract #9999BSAS201200001004 - 2013 - CT
» Service Delivery Summary	
» Service Delivery Header	Service Delivery Report Release Progress Status
» Service Delivery Pattern	
» Notes	The SDB 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
	Suk 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 bo your organization t on submitting supp the service data ma	ix, you hereby confirm that by confirm that by consumit such data through ElM. emental transactions. You also arked as "Claimed" is intended for the such as "Claimed" is intended.	licking the "Authorize" or "Release" I If after submission of this record yo acknowledge that it is not the intent or reporting purposes only.	button below, you a ou determine that it is of your organizatior	re providing data that is complete s incorrect, you can submit a sup n to bill for any services that wou	e and accurate in all i oplemental transaction uld result in payments	respects, and that you have be n to correct it. Please see the u s exceeding the contracted am	en given authority by ser guide for instruction ount. In such instances,
			Display To	tals Unlock All Enro	ollments	Release Service Delivery	Delete SDR
Claimed Grand Total Amount:	\$38,795.00	Claimed Grand Total Units: 52	8.00	Claimed Grand Total Payable Units:	528.00	Claimed Grand Total Da	ys: 352
Paid Grand Total Amount:	\$0.00			Paid Grand Total Payable Units:	0		
			 Only Clie Only Clie All Clien 	ents with Delivered Services ents with No Delivered Servic ts	ces		Print SDR
Display 1 to 10 of 12 Next S	et >> page 1 of 2 GC	D					

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.



	Authorize Service Delivery	Release Servio	ce Delivery	Disapprove Service Deliver	ry Disp	olay Totals	Unlock Al	I Enrollment
Claimed Grand Total Amount:		Claimed Grand Total Units:		Claimed Grand Total Payable Units:		Claimed Gran	nd Total Days:	
Paid Grand Total Amount:			Paid Grand Total Payable Units:					
			Only Cli	ents with Delivered Services				
			Only Cli	ents with No Delivered Services	\$		P	rint SDR

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.

ivery Report	Contract #9999BSAS2012000010	04 - 2013 - CT - DPH Provider 100	4	
elivery Report Summary	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 l			

3. Select the <u>Draft</u> link. The Service Delivery Summary page appears with a roster of clients.

Service Delivery Report	Contract #9999BSAS2	201200001004 - 2013 - CT -	DPH Provider 1004						
» Service Delivery Summary	•								
» Service Delivery Header	Service Delivery Summar	ſy							
» Service Delivery Pattern	Month:	July		Year: 20	012				
» Notes	Submission Date:			Status: Draft					
	SDR Type:	Supplemental							
	SDR Reference Number:			SDR Mode: S	Select Below				
						Save Ch			
	°Sort By:	Cient Name V Sort Go To Page Containing	Client Last Name Starting With:		60				
	*Sort By: Enrollment Id: <u>19153</u>	Client Name V Soft Go To Page Containing Sample, Ann Client Id: 2535	Client Last Name Starting With:	Offset: \$0.00 Vo	Go oided Units: 0	e Cia Amo			
	*Sort By: Enrollment Id: <u>19153</u> Provider Location: DPH Provider 1004	Client Name V Soft Go To Page Containing Sample, Ann Client Id: 2536 Activity/Sub-Activity: 3434 - Human Serv	Client Last Name Starting With:	Offset: \$0.00 Vo	Go oided Units: 0 V2013	e Cla			
	*Sort By: Enrollment Id: <u>19153</u> Provider Location: DPH Provider 1004 Service 1 2 3 4 5	Client Name V Soft Go To Page Containing Sample, Ann Client Id: 2536 Activity/Sub-Activity: 3434 - Human Serv 6 7 8 9 10 11 12 13	Client Last Name Starting With:	Offset: \$0.00 Vo t Submission Date: 01/18/ 20 21 22 23	Co oided Units: 0 Voits: 0 Voi	9 Cla Amo 28 29 ::			

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 Re	port Search > Service Delivery Summary > Rec	cord Service Delivery		
Service Delivery Report	Contract # 9999BSAS	201200001004 - 2013 - CT		
» Service Delivery Summary				
» Service Delivery Header	Contract Identifier/Number:	9999BSAS201200001004 - 2013 - CT	Contrac	t Type: UNIT
» Service Delivery Pattern	Pecord Service Delivery f	or Client #253071 : Ann G. Sample	Enrollment Id # 18163	
» Notes	Record Service Belivery I	or elient #255571 . Ann e. sample	Emonnentia # 10105	
» Client Form	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 Pavable Units:	0
	Fully Offset Claimed Amount:			
	Offset Amount:	0	Offset Reason:	Select Below
	Offset Start Date:		Offset End Date:	
	Claimed Total Monthly Amount:	\$0.00	Service Item Status:	Draft
	Agency Area Office:	Bureau of Substance Abuse Services		
	Comments:			
				View Previous Service Delivery Reports

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

Pre	evious S	er	vice	Del	iver	y Re	ероі	rts																						
Stat	us: <u>Passed</u>		Total D	ays:14		Total	Units	: 14		Voide	Voided Units: 0 7		Tota	Total Payable Units: 14			m	Claimed Total monthly amount: \$1,400.00		otal Int: S	Submission Date:01/18/2013									
	Service Code																													31
\bigcirc	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
																								(Sav	e Cha	nges	_ C	ору	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 rebilled.

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



- 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.

		Display	Totals Unlock All Enro	llments	Release Service Delive	ery Delete
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 C	lients with Delivered Services			
		Only C	lients with No Delivered Servic	es		Print SDR
		All Clie	ents			

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

Current Location: Billing: Service Delivery Rep	port Search > Service Delivery Summary	
Service Delivery Report	Confirm SDR Deletion	
» Service Delivery Summary		
» Service Delivery Header	Are you sure you want to delete this SDR? Please click "Confirm Delete" to delete the record or "Cancel Delete" to cancel the operation.	
» Service Delivery Pattern		
» Notes	Contirm Delete Cancel Del	ete
» HOICS		

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.

Billing	PRC/CEC Sea	arch								
» Claim Search										
» PRC/CEC Search		Contract Number:					Fiscal Y	/ear: 2013		
» Invoice Search	_	Activity Codes		7			Activity No	umor Human Se	cuice Activity	
» Accommodation Rate Invoice Search		Activity Code:					Activity in	arrie: Human Se	I VICE ACTIVITY	•
» Ready Pay Invoice Search		Provider Name:				١	/endor Customer C	Code:		
» Re-adjudicate Service Lines										
» Global Update Appropriations		Agency Name:								
» Explanation of Benefits (EOB)		Service Date From:	07/01/2012				Service Date	e To: 09/30/2012	2	
» Service Delivery Report Search		PRC/CEC Document ID:				Invoice/	SDR Reference Nun	nber:		Select Below 🗸
		PRC/CEC Status:	Select Below	~						
		Unit Code:								
										Se
	Search Results									
	PRC/CEC Document ID	Contract Number		Provider Name	Activity Code	Service Date From	Service Date To	Create Date	PRC/CEC Status	Amount
	INTF234813000000001	9999BSAS201200001004 -	2013 - CT	DPH Provider 1004	3434	09/01/2012	09/30/2012	01/24/2013	PRCReady	\$28,
	INTF234813000000002	9999BSAS201200001004 -	2013 - CT	DPH Provider 1004	3434	08/01/2012	08/31/2012	01/24/2013	PRCReady	\$41,2
	INTE234813000000003	99998545201200001004 -	2013 - CT	DPH Provider 1004	3434	07/01/2012	07/31/2012	01/24/2013	PRCReady	\$28.0

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

Current Location: Billing: PRC/CEC Search > PRC/	CEC Update			
PDC/CFC	Undate PRC/CEC			
Indate PRC/CEC	opuate i No/oEc			
» View PRC/CEC Commodity Service Lines	PRC/CEC Document Infor	mation		
» Process Deficiency Payments	Document Code:	PRC	Department Code:	DPH
» Reapportion PRC/CEC	Unit Code:	2348	Invoice/SDR Reference Number	
	Document ID:	INTF234813000000003	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:	9999BSAS201200001004 - 2013 - CT
	*Scheduled Pmt Date:	01/24/2013		
	*Record Date:	01/24/2013	Accounting Period Number	
	Vendor PRC/CEC Number:	INTF234813000000003	*Vendor PRC/CEC Date:	01/24/2013
	Budget Fiscal Year:	2013	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 L	ine Information		
	Commodity Line	Accounting Line	Total Amour	t
	Z	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. 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.

Claimed Grand Total	Claimed Grand Total Units:		Claimed Grand Total	Claimed Grand Total Day	Display Totals
Amount:	clained orang rotal onits.		Payable Units:	channed orand rotar bay	
Paid Grand Total Amount:			Paid Grand Total Payable Units:		
		Only Cli	ents with Delivered Services ents with No Delivered Services	•	Print SDR
		All Clier	its		

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.

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 #9999BSA	S201200	001	004 - 3	2013	- CT																					
	Month: July																Yea	r: 2012								
Submis	sion Date: 01/18	3/2013						~ ^			- [Status	s: Partia	ally Pass	sed						
	SDR Type: Regu	ilar					-	SA	IVIT	~L t					Clie	ents to	Include	e: All								
SDR Reference	e Number:						_									SI	OR Mode	e:								
Claimed Grand Total Amount: \$29	,279.00			Claim	ned Gran	d Tota	l Units:	323			CI	laime	ed Grand	Total Pag	yable Units: ³¹	23				Claim	ed Gran	d Total	Days: 2	68		
Paid Grand Total Amount: \$28	,050.00										Paid	l Grar	ind Total F	ayable l	Units: 2	98										
Enrollment Id: 18163		Sar	mple, Ann	ub Activit	hr 3/3/	Clier	nt Id: 25	53971	Tota	I Days:	14	Tot	tal Units: 1	14	Offset	: \$0.00		Voide	ed Unit:	s: 0	Total 14	Payable	Units:	Mor	Claimed hthly Am \$1,4	I Total ount: 00.00
Provider Education: DPH Provider 1004			Activity/3	JD-ACUVI	ly. 3434 -	numan	3er vice	e Activity		1				Last aut	JIIISSIO	in Date.			1	30	atus. Fa	sacu				
Service Code 1 2 3	4 5	6	/ 8	9	10	11	12	13	14	15	16	1/	18	19	20	21	22	23	24	25	26	2/	28	29	30	31
													× 1	× 1	X 1	× 1	<u>^</u> 1	× 1	<u>^1</u>	× 1	<u>^1</u>	× 1	×1	× 1	<u>^</u> 1	A 1
Enroliment id: 18081		Sar	mple, Bob			Clier	nt Id: 45	56582	Tota	I Days: :	20	Tot	tal Units: 2	20	Offset	: \$0.00		Voide	ed Unit:	s: 0	Total 20	Payable	e Units:	Mor	Claimed hthly Am \$2,0	I Total ount: 100.00
Provider Location: DPH Provider 1004			Activity/S	Ib-Activit	br 3434	Human	Service	e Activity						Last Sub	omissio	n Date				Sta	atus: Pa	ssed				
Trovider Edealion. Dimitrovider 1004			Activity/3		9.0404.5												·									
Service Code 1 2 3	4 5	6	7 8	9	10	11	12	13	14	15	16	17	7 18	19	20	21	22	23	24	25	26	27	28	29	30	31

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 <u>Service Delivery Report</u> link.

Reports	Reports	
	ESM Reports	EIM Reports
	Client Enrolment Status Clients with incomplete Data	Activity PRC Details by Sub-Activity Commodity Based Payment Request Cost Rembursement Budget
	System Assurance Reports	Cost Reinbursement Expenditure Analysis Cost Reinbursement Invoice Pavment Detail Report by Red Davs Pavment Detail RVCIent Report
	Note:	Pavment Tracking Report Ready Pav Contract Resonciliation Report Remittance Advice by Bed Dava
	The reports are generated in Adobe PDF and Microsoft Excel format. <u>Click here to download free Acrobat Reader</u> to view PDF files. <u>Click here to download Microsofts free Excel</u> Viewer to view Projet file.	Heintfance Advice to VService Code Service Delivery Report Services from segurated with a Claim or Have an Error

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

Current Location: Reports> Service Delive	Report	
Reports	SDR - Service Delivery Report	
» Report		_
	*Contract/Credential 999995A5201200001004 - 2013 - CT 🖌 Filter: 9999baas% Filter	
	*Activity Code: 3434 - Human Service Activity	
	*SDR Monte: July	
	*SDR Regular Parially Passed 🛩	
	Only Clients with Delivered Services	
	*Clients to Include: 🔘 Only Clients with No Delivered Services	
	All Clients	
	Print SDR CIE	ar

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.

- on a u	:t #9	999	BSA	S20	120	000	1004	1 - 2	013	- CT																					
				Mo	nth: Ju	ly																Year	r: 2012								
			Submi	ssion [ate: 01	/18/2013	3						~ ^ .									Status	: Partia	ly Pass	ed						
				SDR T	ype: Re	egular							SAI	NF	'Lt					Cli	ients to	Include	e: All								
		SDR F	Referen	e Num	ber:																SI	OR Mode									
Claimed G	rand To	tal Amo	ount: \$2	9,279.0)				Claim	ed Gran	d Total	Units:	323			CI	laimed	Grand	Total Pay L	yable Jnits:	323				Claime	ed Gran	d Tota	al Days:	268		
Paid G	rand To	tal Amo	ount: \$2	B,050.0)											Paid	Grand	Total P	ayable L	Jnits: 2	298										
Enrollment Id	: 18163					Sa	imple, /	Ann			Clien	t ld: 25	3971	Total	Days: 1	4	Total	Units: 1	4	Offse	t: \$0.00	1	Voide	d Units	: 0	Total 14	Payab	le Units	: M	Clain onthly	ned To Amou \$1,400.
Enrollment Id: Provider Loca	: 18163 ition: DF	'H Provic	der 1004			Sa	ample, /	Ann vity/Sul:	o-Activit	y: 3434 -	Clien Human	t Id: 25 Service	3971 Activity	Total	Days: 1	4	Total	Units: 1	4 .ast Sub	Offse	nt: \$0.00		Voide	d Units	: 0 Sta	Total 14 tus: Pa:	Payab ssed	le Units	M	Clain onthly	ned Tc Amour \$1,400.
Enrollment Id: Provider Loca Service Code	: 18163 ition: DP	H Provic	der 1004 3	4	5	5a	Activ	Ann rity/Sul: 8	9-Activit	y: 3434 - 10	Clien Human : 11	t Id: 25 Service 12	3971 Activity 13	Total	Days: 1	4	Total	Units: 1 L	4 .ast Sub 19	Offse omissio 20	t: \$0.00 on Date: 21	22	Voide 23	d Units	: 0 Sta 25	Total 14 tus: Pas 26	Payab ssed 27	le Units	: M	Clain onthly 30	ned Tc Amour \$1,400.
Enrollment Id: Provider Loca Service Code 3D	: 18163 tion: DF	H Provic	der 1004 3	4	5	6	Activ	Ann /ity/Sub 8	9-Activit	y: 3434 - 10	Clien Human	t Id: 25 Service 12	Activity	Total	Days: 1	4	Total	Units: 1 L 18 X 1	4 .ast Sub 19 X 1	Offse omissio 20 X 1	t: \$0.00 on Date: 21 X 1	22 X 1	Voide 23 X 1	d Units	: 0 Star 25 X 1	Total 14 tus: Pas 26 × 1	Payab ssed 27 X 1	28 X 1	29 X 1	Clain Ionthly (30 × 1	ned Tc Amou \$1,400. 3 3 X 1
Enrollment Id: Provider Loca Service Code BD Enrollment Id:	: 18163 tion: DP 1 : 18081	H Provic	ier 1004 3	4	5	6 Sa	Activ 7 imple, 8	Ann rity/Sul: 8 Bob	9	y: 3434 - 10	Clien Human 11 Clien	t Id: 25 Service 12 t Id: 45	3971 Activity 13 6582	Total	Days: 1 15 Days: 2	4	Total	Units: 1 L 18 X 1 Units: 2	4 ast Sub 19 × 1	Offse omissio 20 X 1 Offse	t: \$0.00	22 X 1	Voide 23 X 1 Voide	d Units	: 0 Sta 25 X 1 : 0	Total 14 tus: Pa: 26 × 1 Total 20	Payab ssed 27 X 1 Payab	28 X 1	29 X 1	Clain Ionthly 30 × 1 Claim onthly /	ned To Amou \$1,400. X 1 Ned To Amou \$2,000.
Enrollment Id: Provider Loca Service Code BD Enrollment Id: Provider Loca	: 18163 (tion: DF 1 : 18081 (tion: DF	H Provid	der 1004	4	5	6 Sa	Activ 7 Imple, f	Ann rity/Sub 8 Bob rity/Sub	9 9	y: 3434 - 10 y: 3434 -	Clien Human	t Id: 25 Service 12 t Id: 45 Service	Activity 13 6582 Activity	Total	Days: 1 15 Days: 2	4	Total	Units: 1 18 × 1 Units: 2	4 .ast Sub 19 × 1	Offse omissio 20 X 1 Offse omissio	t: \$0.00 on Date: 21 × 1 t: \$0.00 on Date:	22 X 1	Voide 23 X 1 Voide	d Units	: 0 Star 25 × 1 : 0 Star	Total 14 26 × 1 Total 20 tus: Par	Payab ssed 27 × 1 Payab ssed	28 X 1 Ie Units	: M 29 X 1	Clain lonthly 30 × 1 Claim onthly	ned To Amou \$1,400 X 1 ned To Amou \$2,000
Enrollment Id: Provider Loca Service Code BD Enrollment Id: Provider Loca Service Code	: 18163 tion: DP 1 : 18081 tion: DP	H Provic	der 1004 3 der 1004 3	4	5	6 6 6	Activ 7 Imple, I Activ 7	Ann rity/Sul: 8 Bob rity/Sul: 8	-Activit 9 -Activit	y: 3434 - 10 y: 3434 - 10	Clien Human : 11 Clien Human : 11 Clien Human : 11	t Id: 25 Service 12 t Id: 45 Service 12	Activity 13 6582 Activity 13	Total	Days: 1 15 Days: 2 15	4	Total 17 Total 17 Total 17	Units: 1 18 × 1 Units: 2 18	4 .ast Sub 19 × 1 :0 :0 .ast Sub 19	Offse omissio 20 × 1 Offse omissio 20	t: \$0.00 on Date: 21 x 1 t: \$0.00 on Date: 21	22 X 1 22	Voide 23 × 1 Voide 23	d Units	: 0 Sta 25 × 1 : 0 Sta 25	Total 14 14 26 × 1 Total 20 tus: Pas 26	Payab ssed 27 X 1 Payab ssed 27	28 × 1 le Units	29 × 1	Clain lonthly 30 × 1 Claim onthly / 30	ned Tc Amou §1,400. X 1 X 1 Ned To Amou §2,000.

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).
 - o 155 Unit Rate Billing Part 1
 - o 156 Unit Rate Billing Part 2
 - o 159 Manage Enrollment Location
- Additional EIM/ESM Provider Job Aids are found at:
 - o 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:
 - o <u>EHS-DL-EIM-ESMBusinessOperations@massmail.state.ma.us</u>
- Call the Virtual Gateway Customer Service for assistance:
 - o **(800) 421-0938**
 - o 617-847-6578 (TTY people who are deaf, hard of hearing, or speech disabled)
 - o Monday Friday: 8:30am 5:00pm