



Super User EPIC Reference Guide



**Electronic Provider Interactive Claims
Online SHARS Billing**

<http://www.tsbs.cc/>

Username/Login name: _____

Password: _____

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Welcome to Texas State Billing Services online SHARS Billing: **EPIC**
To access EPIC, log on to our website at: <http://www.tsbs.cc/>

TEXAS STATE BILLING SERVICES, INC.

CLIENT LOGIN | SHARS BILLING

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LEADING THE INDUSTRY FOR SHARS BILLING SERVICES

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WELCOME TO TSBS WEBSITE >

TSBS is pleased to present their Medicaid billing and consulting services to Texas School Districts.

Our goal is to provide exceptional customer service while maximizing SHARS returns and minimizing the workload for your district.

- Commitment to Superior Service
- Online SHARS Billing Technology
- Expert SHARS Consultation

Our mission is to lead the way in providing the most efficient and professional SHARS Medicaid billing services for Texas school districts with a commitment to provide superior customer service.

WHY CHOOSE US?

TSBS has been devoted to Texas school districts and an expert of the SHARS program since 1998! View our **Testimonials** and read what our clients say.

Contact us for a list of references and we are certain they will be candid and open in sharing their experiences with TSBS and how we have helped them grow, develop and refine their district's SHARS program.

Login:

Password:

Login

TMHP

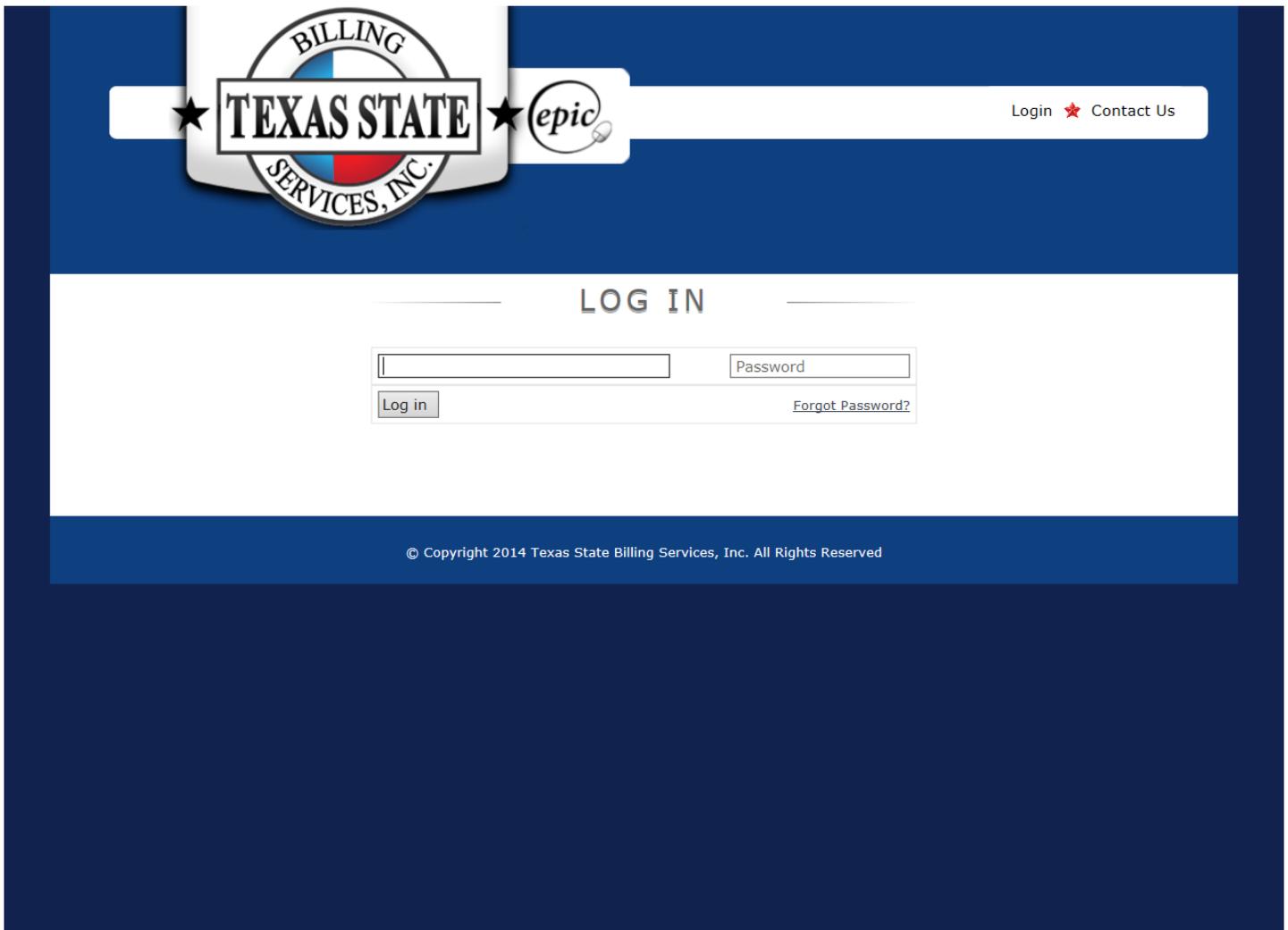
HHSC

FB FAIRBANKS

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Click **SHARS Billing** next to the TSBS logo on the TSBS homepage to get started.

You will be directed to the EPIC homepage shown on the next page.



Your login ID will be your Email address and your initial password will be *America* (Password is case sensitive). Upon first login you will be prompted to change your password. Your new password must be between 6 & 15 characters and contain at least one capital letter and one number.

After entering your information, click the **Login** button. You will be directed to the **Saved Sessions** page.

NOTE: If you have forgotten your password, select “Forgot Password?” and enter your e-mail address, the text as seen in the box and click “Send Password”. If you are a registered user your password will be sent to your email address. If you receive a blank password, double-check your login email address for typos. If correct, please contact your Account Representative to set up an account.

My Account

The screenshot shows the 'My Account' page. At the top, there is a navigation bar with the Texas State Billing Services, Inc. logo and the 'epic' logo. The navigation bar includes links for Logout, Training, User Guide, Updates, and Contact Us. Below the navigation bar, there are two tabs: 'Saved Sessions' and 'My Account'. The main content area is titled 'My Account' and displays the practitioner's name, Areli Ramos-Morales (ID: 98095). Under 'Account Administration', there is a 'Reset Password' link with the instruction 'Change your password.' and a 'Student IEP Limits' link with the instruction 'Enter minutes per period for students in your caseload.' Below these links, it states 'The following options are available to district super-users.' Under 'Reports', there are two links: 'View Practitioner Student Service Units by Year' and 'View Student Service Summary'. Under 'District Super User Options (continued)', there are four links: 'View Practitioner Sessions', 'View District Students', 'Setup IEP Periods', and 'Setup Super-User Approval'. The footer of the page contains the copyright notice: '© Copyright 2014 Texas State Billing Services, Inc. All Rights Reserved'.

On the **My Account** Page, you will be able to reset your password, view 2 types of Practitioner-Student reports, view Practitioner Sessions, View District Students, Add students to the District and, optionally, Setup IEP Periods and Super-User Approval of Practitioner claims.

Reset Password

The screenshot shows the 'Reset Password' page. At the top, there is a navigation bar with the Texas State Billing Services, Inc. logo and the 'epic' logo. The navigation bar includes links for Logout, Training, User Guide, Updates, and Contact Us. Below the navigation bar, there are two tabs: 'Saved Sessions' and 'My Account'. The main content area is titled 'Reset Password' and contains the following text: 'For security reasons, you must change your password from the initial password provided by TSBS. To change your password, complete the form below and click on the update button.' Below this text, there are two input fields: '*New:' and '*Confirm:'. To the right of the '*New:' field, there is a red asterisk and the text '*must be between 6 & 15 characters, contain 1 capital letter & 1 number'. Below the input fields, there is an 'Update' button. The footer of the page contains the copyright notice: '© Copyright 2014 Texas State Billing Services, Inc. All Rights Reserved'.

VIEW DISTRICT STUDENTS

From the **My Account** screen, click **View District Students** to display the **Student Records** screen.

BILLING TEXAS STATE SERVICES, INC. epic Logout ★ Training ★ User Guide ★ Updates ★ Contact Us

Enter Service Hours Saved Sessions Edit Caseload **My Account**

Student Records

Practitioner: Amy Rios

District: Texas ISD

Active Students

[Export Student List to Excel](#)

Black, Rebecca - 06/05/2002
Bowman, Alan - 518099009 - 02/15/2000
Harrison, Andrew - 518099003 - 02/07/2000
Hudson, Catherine - 518099012 - 03/26/1994
Jackson, Ryan - 518099010 - 01/18/1999
Jorgenson, Keith - 08/03/2003
Marlow, Gabriella - 518099001 - 03/15/2001
Moore, Steven - 518099006 - 03/23/1996
Morris, Jennifer - 518099004 - 05/08/1994
Ortiz, Matthew - 518099013 - 08/25/2001

Note: Students in gray are not medicaid eligible at this time.

Add a Student to the System

To add a student not in the system, please fill-in the fields below and send the request to TSBS. Fields with the red asterisk (*) are required.

*District:

*Student First Name:

*Student Last Name:

*Medicaid ID or DOB:

*Campus:

Social Security No:

*Has IEP for SHARS Services?: Yes | No

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From this screen you may view all the students enrolled this school year. The light gray names denote non-Medicaid students and the black font displays Medicaid students with Medicaid ID and birthdate.

You may export the student list to Excel by clicking the link; the spreadsheet will be found in your My Documents/Downloads folder. You can adjust the column widths and customize the spreadsheet to your preferences.

Add a Student to the System

You may add a student to the EPIC system by completing the red asterisk-designated fields and the new field that indicates whether the student has SHARS services required in their IEP; click **Send Request**.

Overnight processing will add the student information to the database and will display on the Active Students list the next business day. You will receive a confirmation email sent to your EPIC Login email address when student has been added.

VIEW PRACTITIONER SESSIONS

From the **My Account** screen, click **View Practitioner Sessions** to display all the Saved, Submitted, (and possibly Pending and Returned) sessions for your district. The red arrows point to drop-down menus that provide a wide assortment of Viewing and Filtering options along with column header operations. The yellow highlight shows additional screen functions. All are explained below.

Please approve pending sessions each week so they can be processed by TSBS. Sessions that remain pending for more than two weeks may be automatically approved and submitted.

Double-click Status or Feedback to edit Pending records; press Enter to save changes.

Data shown for School Year: 08/01/2014 - 07/31/2015

Status	Feedback	Svc Area	Last Name	First Name	DOS	Med ID	P First	P Last	Last Upd
+	Saved	Personal Care	Black	Rebecca	08/04/2014	NM0456556	Ann	Tafel	08/06/2014 10:29 AM
+	Saved	Speech Therapy	Black	Rebecca	08/04/2014	NM0456556	Ann	Tafel	08/06/2014 10:01 AM
+	Saved	Speech Therapy	Black	Rebecca	08/01/2014	NM0456556	Lauren	Allgood	08/12/2014 10:39 AM
+	Saved	Physical Therapy	Bowman	Alan	08/04/2014	518099009	Jerry	Wight	08/05/2014 10:28 AM
+	Saved	Personal Care	Bowman	Alan	08/04/2014	518099009	Jerry	Wight	08/05/2014 10:24 AM
+	Saved	Personal Care	Bowman	Alan	08/01/2014	518099009	Becca	Fontaine	08/05/2014 11:19 AM
+	Submitted	Nursing	Bowman	Alan	08/01/2014	518099009	Amber	Paige	08/07/2014 11:12 AM
+	Submitted	Speech Therapy	Bowman	Alan	08/04/2014	518099009	Stasia	Viator	08/05/2014 4:03 PM
+	Saved	Psychological Testing	Bowman	Alan	08/12/2014	518099009	Lauren	Allgood	08/13/2014 8:19 AM
+	Submitted	Personal Care	Bowman	Alan	08/01/2014	518099009	Robbie	Ewen	08/11/2014 4:35 PM
+	Saved	Nursing	Bowman	Alan	08/04/2014	518099009	Jerry	Wight	08/06/2014 10:04 AM
+	Saved	Personal Care	Bowman	Alan	08/11/2014	518099009	Robbie	Ewen	08/07/2014 2:09 PM
+	Saved	Nursing	Harrison	Andrew	08/04/2014	518099003	Robbie	Ewen	08/06/2014 11:57 AM
+	Submitted	Nursing	Harrison	Andrew	08/01/2014	518099003	Holly	Wyatt	08/11/2014 4:34 PM
+	Submitted	Assessment	Harrison	Andrew		518099003	Robbie	Ewen	08/06/2014 12:06 PM

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VIEWING/FILTERING OPTIONS

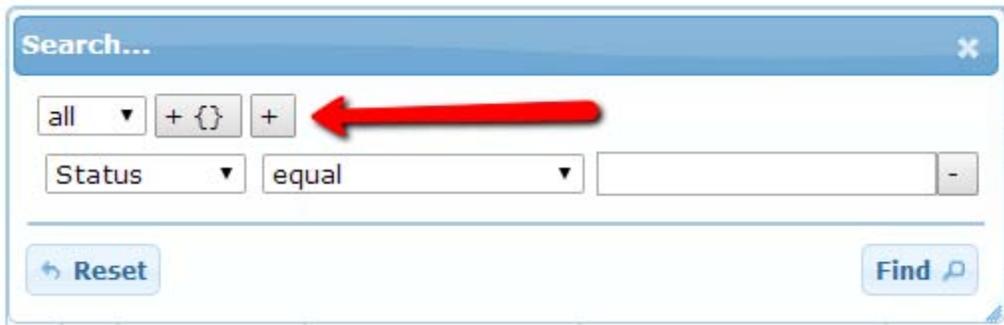
The super user is only able to View, Approve or Return sessions. Only the practitioner can Edit a session.

School Year: This drop down function allows you to view sessions for a specific school year. The school year spans August 1 through the following July 31.

PAGE: This box allows you to switch between pages of sessions under the filter selected and the 2nd box allows you to set sessions per page (up to 200).

The yellow highlighted screen functions are:

Magnifying glass icon: This is a *Find Records* feature that allows you to use the column headings to construct search parameters. Click the icon to open the Search box and use the + sign to add additional column values to search on.

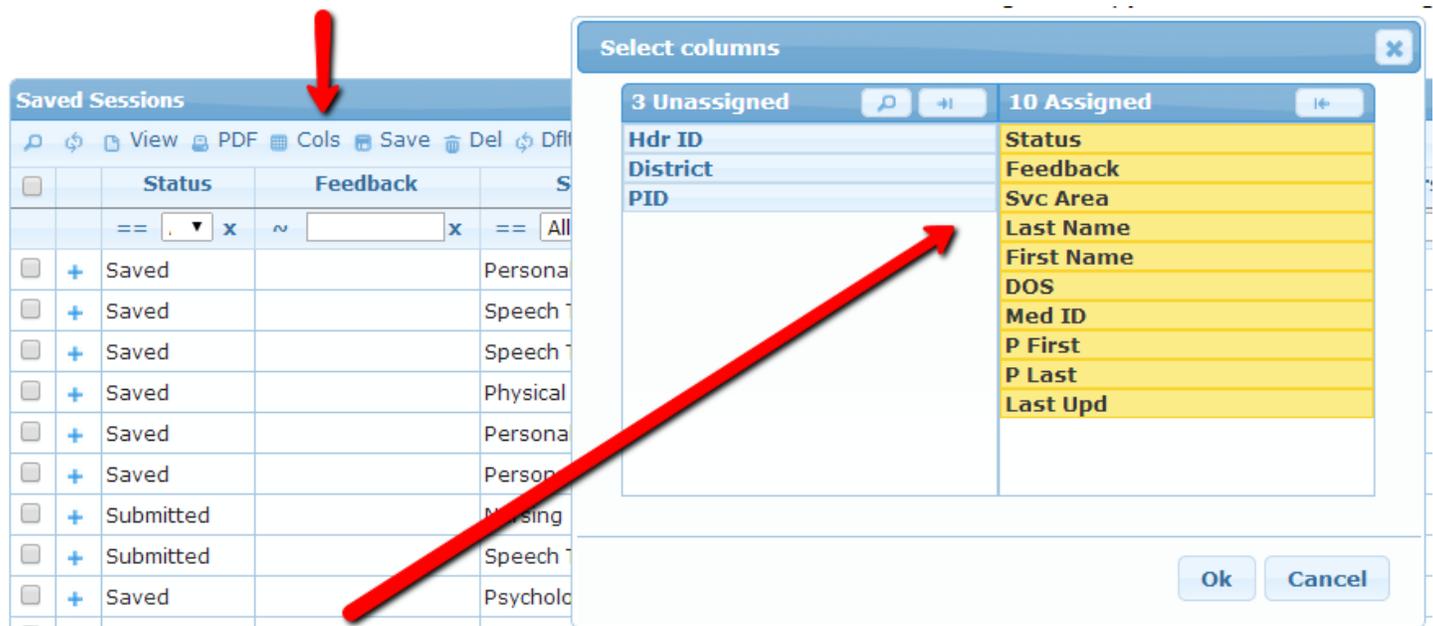


Circular Arrows icon: *Show all for this School Year (Clear Search Criteria)* This will reload all of the sessions for the current school year and clear any search values you had previously entered in the *Find records* feature or by keying specific values into the white boxes beneath each column heading.

View: By clicking the small checkbox at the far left of any session and then clicking *View* you will see the Print Record format in a new tab. You may then return to the “District Super User Caseload View” tab, uncheck the box, and check another session to *View*. Another new Print Record tab will open.

PDF: This functions allow you to print multiple sessions at once. Simply checkmark the boxes on far left (up to 15 at a time) to indicate the sessions to Print to PDF.

Cols: Clicking on the Cols function allows you to show or hide individual columns. This opens up a “Select Columns” window. Simply click the column name on the Assigned list to move it to the Unassigned/Hide list.



Save: This function saves the latest changes made to the viewing/filtering options.

Del: This function deletes all your Saved settings and allows you to create a new set.

Dflt: This function is the Default; whenever it is clicked, it will reload with the most recently Saved settings.

SORTING OPTIONS

Under the blue title “Saved Sessions” you are able to sort by the column headers. Click on the column header you wish to sort. Clicking again will reverse the order.

You can filter sessions by keying in values in the white boxes beneath column headers (e.g. Key “Bowman” in Last Name box to view only the sessions for student Alan Bowman.)

Each column header with a math symbol next to the white box is able to be filtered to specific values. Click on the symbol to view a drop down of the operators for that field. This will allow you to more specifically filter your results if you would like.

Data shown for School Year: 08/01/2014 - 07/31/2015

Status	Feedback	Svc Area	Last Name	First Name	DOS	Med ID	P First	P Last	Last Upd
+		Personal Care	B	Alan	08/04/2014	NM0456556	Ann	Tafel	08/06/2014 10:29 AM
+		Speech Therapy	B	Ann	08/04/2014	NM0456556	Ann	Tafel	08/06/2014 10:01 AM
+		Speech Therapy	B	Lauren	08/01/2014	NM0456556	Lauren	Allgood	08/12/2014 10:39 AM
+		Physical Therapy	B	Jerry	08/04/2014	518099009	Jerry	Wight	08/05/2014 10:28 AM
+		Personal Care	B	Jerry	08/04/2014	518099009	Jerry	Wight	08/05/2014 10:24 AM
+		Personal Care	B	Becca	08/01/2014	518099009	Becca	Fontaine	08/05/2014 11:19 AM
+		Nursing	B	Amber	08/01/2014	518099009	Amber	Paige	08/07/2014 11:12 AM
+		Speech Therapy	B	Stasia	08/04/2014	518099009	Stasia	Viator	08/05/2014 4:03 PM
+		Psychological Testing	B	Lauren	08/12/2014	518099009	Lauren	Allgood	08/13/2014 8:19 AM
+		Personal Care	B	Robbie	08/01/2014	518099009	Robbie	Ewen	08/11/2014 4:35 PM

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FOR SUPER USERS WITH APPROVAL OPTIONS:

For super users who have setup the function to approve one or more practitioner’s sessions before they are submitted to TSBS for processing, the following filter options are in place:

Status: Clicking this drop down allows the super user to view only Pending sessions which require Approval or Return.

Once a session has been reviewed for all-correct data then double-click the Status field and select either Approved or Returned. If Approved, the session will then be transmitted to TSBS in the following Monday morning’s processing job. (Status is changed to Submitted at that time.)

Feedback: Double-click this field to supply text information to the practitioner on the reason for a “Returned” session.

When “Returned”, the session will display in the practitioner’s Saved Sessions “Returned” and will be editable for corrections. When the practitioner Submits the session again, it will be marked as “Pending” for the super user to view and Approve and submit to TSBS or Return for more corrections.

EXAMPLE: SUPER USER VIEWS PENDING SESSIONS PRIOR TO APPROVE/RETURNED

Please approve pending sessions each week so they can be processed by TSBS. Sessions that remain pending for more than two weeks may be automatically approved and submitted.

 Double-click Status or Feedback to edit Pending records; press Enter to save changes.

Data shown for School Year: 08/01/2014 - 07/31/2015

Saved Sessions										
Status	Feedback	Svc Area	Last Name	First Name	DOS	Med ID	P First	P Last	Last Upd	
+	Saved		Bowman	Alan	08/01/2014	518099009	Becca	Fontaine	08/05/2014 11:19 AM	
+	Saved		Reiter	Sherry	08/01/2014	518099005	Becca	Fontaine	08/15/2014 10:48 AM	
+	Pending		Reiter	Sherry	08/05/2014	518099005	Becca	Fontaine	08/15/2014 10:49 AM	
+	Pending		Reiter	Sherry	08/01/2014	518099005	Becca	Fontaine	08/15/2014 10:48 AM	
+	Submitted		Richardson	Toby	08/01/2014	NM0983119	Becca	Fontaine	08/11/2014 4:34 PM	

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EXAMPLE: SUPER USER APPROVES 1 SESSION AND RETURNS ANOTHER

Please approve pending sessions each week so they can be processed by TSBS. Sessions that remain pending for more than two weeks may be automatically approved and submitted.

Double-click Status or Feedback to edit Pending records; press Enter to save changes. 

Data shown for School Year: 08/01/2014 - 07/31/2015

Saved Sessions										
Status	Feedback	Svc Area	Last Name	First Name	DOS	Med ID	P First	P Last	Last Upd	
+	Saved		Bowman	Alan	08/01/2014	518099009	Becca	Fontaine	08/05/2014 11:19 AM	
+	Saved		Reiter	Sherry	08/01/2014	518099005	Becca	Fontaine	08/15/2014 10:48 AM	
+	Approved		Reiter	Sherry	08/05/2014	518099005	Becca	Fontaine	08/15/2014 10:49 AM	
+	Returned	Need more data	Reiter	Sherry	08/01/2014	518099005	Becca	Fontaine	08/15/2014 10:48 AM	
+	Submitted		Richardson	Toby	08/01/2014	NM0983119	Becca	Fontaine	08/11/2014 4:34 PM	

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EXAMPLE: PRACTITIONER VIEWS THE APPROVED/SUBMITTED AND THE RETURNED

 You have sessions with status of Returned. Please review & re-submit these sessions.

Data shown for School Year: 08/01/2014 - 07/31/2015

Saved Sessions										
View	Edit	Copy	Status	Feedback	Last Name	First Name	DOS	Med ID	Last Upd	Svc Area
+	View	Edit	Copy	Saved	Reiter	Sherry	08/01/2014	518099005	08/15/2014 10:48 AM	Speech Therapy
+	View	Edit	Copy	Returned	Reiter	Sherry	08/01/2014	518099005	08/15/2014 11:41 AM	Speech Therapy
+	View	Edit	Copy	Submitted	Reiter	Sherry	08/05/2014	518099005	08/15/2014 11:40 AM	Speech Therapy
+	View		Copy	Submitted	Richardson	Toby	08/01/2014	NM0983119	08/11/2014 4:34 PM	Speech Therapy

*Students highlighted in pale blue have exceeded IEP minutes/period.

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SETUP SUPER-USER APPROVAL

From the **My Account** screen, click **Setup Super-User Approval** to display the **Practitioners List** for the district. From this list you can Search, Select and Deselect practitioners whose submitted sessions will have to be approved by you. You may select or deselect the names at any time; the updates are implemented immediately in realtime.

Use the magnifying glass icon on the Unassigned list to search on any part of the name or the SHARS service. Clicking the icon opens up a search box to enter criteria.

The screenshot shows the 'Choose Practitioners to Approve' interface. At the top, there are logos for 'BILLING TEXAS STATE SERVICES, INC.' and 'epic'. A navigation bar includes 'Logout', 'Training', 'User Guide', 'Updates', and 'Contact Us'. Below this, there are tabs for 'Saved Sessions' and 'My Account'. The main heading is 'Choose Practitioners to Approve', followed by a descriptive paragraph: 'Allows a district super-user to approve time before it is submitted to TSBS. Click the names on the left to add one or more practitioners to the list for approval (or 'Select All' with the button in the upper-right corner of the navigation bar for the Unassigned list)'. Below the text is a table with two columns: '36 Unassigned' and '4 Assigned'. The 'Unassigned' column lists practitioners such as '11440 - Rodriguez, Robert - Physical Therapy' and '99000 - Paige, Amber - Psychological Service'. A magnifying glass icon is visible in the upper right of the 'Unassigned' list. A red arrow points to this icon. The 'Assigned' column lists '98044 - Ewen, Laura - Personal Care', '99002 - Paige, Amber - Personal Care', '99036 - Fontaine, Becca - Speech Therapy', and '99037 - Wyatt, Holly - Nursing'. A copyright notice at the bottom reads '© Copyright 2014 Texas State Billing Services, Inc. All Rights Reserved'.

EXAMPLE: SUPER USER SEARCHES FOR PERSONAL CARE PRACTITIONERS ONLY

This screenshot shows the same 'Choose Practitioners to Approve' interface, but with a search filter applied. The 'Unassigned' list now only displays practitioners with 'Personal Care' services, such as '99004 - Rios, Amy - Personal Care' and '99006 - McQuage, Christina - Personal Care'. A red arrow points to the search filter 'PERS' in the upper left of the 'Unassigned' list. The 'Assigned' list remains the same. The copyright notice at the bottom is '© Copyright 2014 Texas State Billing Services, Inc. All Rights Reserved'.

SETUP IEP PERIODS

From the **My Account** screen, click **Setup IEP Periods** to display the **District Calendar Periods**. From this screen you may create a set of periods in School Year, Semester, Six Weeks or Nine Weeks increments. These periods will be used by practitioners only if they choose to employ the *Student IEP Limits* option for the students in their individual caseloads.

Use the “plus sign” (+) to add new records; use the “garbage can” icon to delete records. To edit an existing record simply double-click each field to be changed.

Press Enter to save changes or Esc to undo changes.

In the example below, the mock district, used only for demos (Texas ISD), displays a variety of periods. In actuality, school districts will create records for the true grading-periods only.

Use the + icon to add, garbage can icon to delete, or double-click a row to edit.
After adding or editing a record, press Enter to save changes or Esc to undo changes.

District	Period	Pd Nm (i.e. 1st Semester)	Start Date	End Date
Texas ISD	Nine Weeks	First nine weeks	08/25/2014	10/24/2014
Texas ISD	School Year	2015 School Year	08/25/2014	06/06/2015
Texas ISD	Six Weeks	First six weeks	08/25/2014	10/04/2014
Texas ISD	Semester	Fall Semester	08/25/2014	12/21/2014
Texas ISD	Six Weeks	Second Six Weeks	10/06/2014	11/14/2014
Texas ISD	Nine Weeks	Second Nine Weeks	10/25/2014	12/01/2014

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VIEW PRACTITIONER STUDENT SERVICE UNITS BY YEAR

From the **My Account** screen, click **View Practitioner Student Service Units by Year** to display the report that shows all SHARS units paid to the district for a school year. This report can be filtered and searched by practitioner, student and SHARS service.

NOTE: Currently, due to the high volume of records to be processed, this report is only accessible by special request of the district super users. Simply contact your Account Representative with the request and allow a business day interim to load the records.

The screenshot displays the Texas State Billing Services, Inc. web application interface. At the top, there is a navigation bar with the company logo and the Epic logo. The navigation bar includes links for Logout, Training, User Guide, Updates, and Contact Us. Below the navigation bar, there are tabs for Saved Sessions and My Account. The main content area shows a report titled "Practitioner Student Service Units - Measurement for Oral Med = Visits, Transportation = 1-Way Trips, all other SHARS = Hours". The report is filtered for the school year 08/01/2014 - 07/31/2015. The report table has columns for Practitioner, Student, Service, Quantity, and Qty Measurement. The table is currently empty, showing "No records to view".

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VIEW STUDENT SERVICE SUMMARY

From the **My Account** screen, click **View Student Service Summary** to display the report that shows all SHARS units paid to the district for the current school year. This report can be filtered and searched by practitioner, student, SHARS service and DOS (date-of-service) range.

NOTE: Currently, due to the high volume of records to be processed, this report is only accessible by special request of the district super users. Simply contact your Account Representative with the request and allow a business day interim to load the records.

The screenshot displays the user interface for the 'Student Service Summary' report. At the top, there is a navigation bar with the Texas State Billing Services, Inc. logo and the 'epic' logo. The navigation bar includes links for 'Logout', 'Training', 'User Guide', 'Updates', and 'Contact Us'. Below the navigation bar, there are tabs for 'Saved Sessions' and 'My Account'. The main content area shows the 'Student Service Summary' report with a search bar and a table. The search bar includes fields for 'Student', 'Practitioner', 'District', 'Service Area', 'DOS(mm/yyyy)', and 'Units Alwd'. The table has columns for 'Student', 'Practitioner', 'District', 'Service Area', 'DOS(mm/yyyy)', and 'Units Alwd'. The table is currently empty. At the bottom of the page, there is a copyright notice: '© Copyright 2014 Texas State Billing Services, Inc. All Rights Reserved'.

Student Service Summary

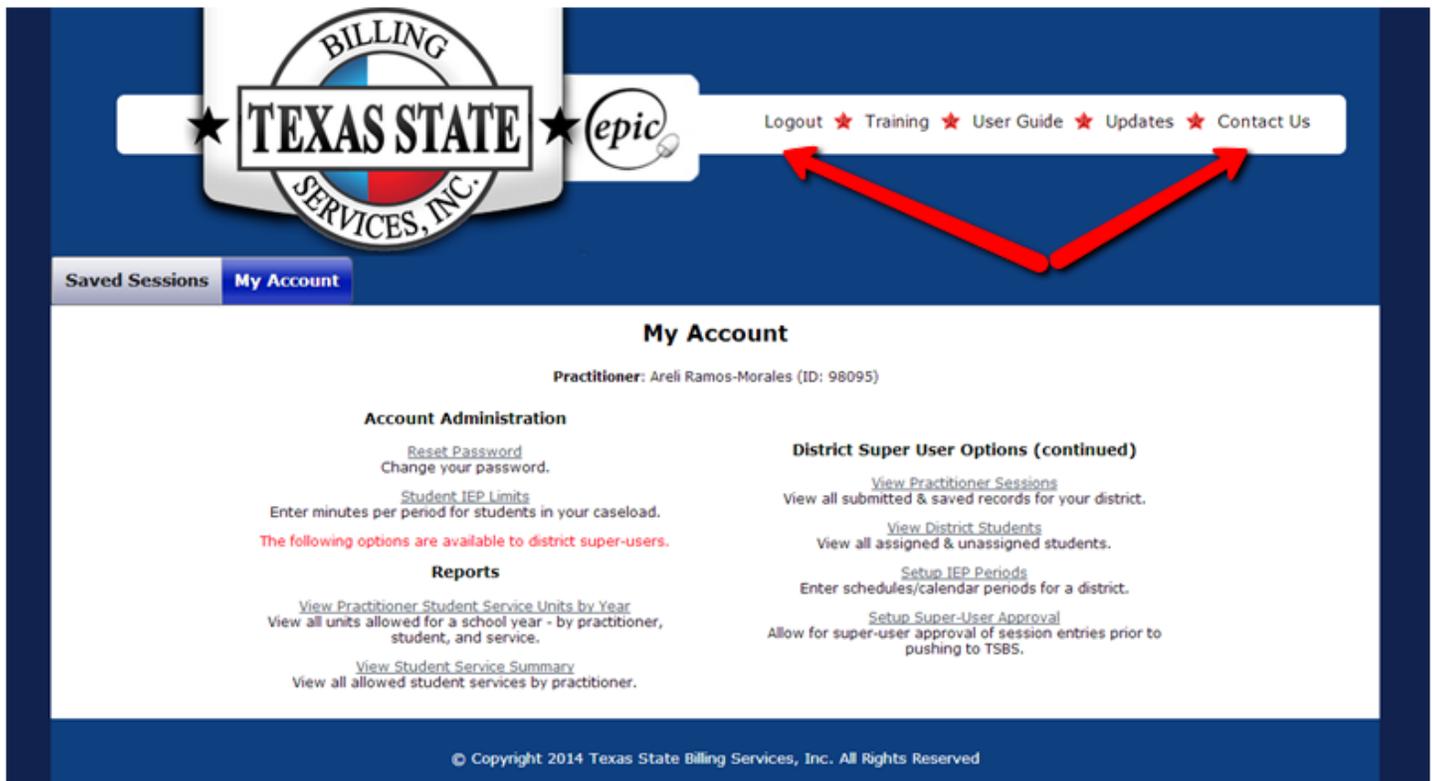
Find Show All Export .xls Page 0 of 200

Student	Practitioner	District	Service Area	DOS(mm/yyyy)	Units Alwd
<input type="text"/>					

Find Show All Export .xls Page 0 of 200

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Additional Options: (Click on the links or logo)



EPIC Logo: This will take you to the EPIC website homepage (<http://epic.tsbs.cc/>)

Logout: This will terminate your session. You will need to save any Search/Filter settings prior to logging out, because the system will not automatically save your data.

Training: This will connect you to the TSBS Client Login Training Portal.

User Guide: This link will have the latest edition of the Super User EPIC Reference Guide, available for download to your computer or for printing.

Updates: This link will list the most recent upgrades and changes to EPIC.

Contact Us: We welcome all your questions, comments, and suggestions.

Texas State Billing Services
1-877-897-8283
Fax: (512) 292-7421
E-mail: info@tsbs.cc

HELPFUL HINTS

- **EPIC LOGIN:** Your EPIC login/account may take up to 5 business days to create; you will receive a confirmation email and initial password when the login is created. Until then you will be unable to access EPIC.
- **ADD STUDENT REQUEST:** Allow up to 2 business days for a student to be added to the EPIC database; you will receive a confirmation email detailing the student's Medicaid status, Medicaid ID and eligibility when the student has been added. The student record will be viewable on the **Active Students** list after clicking *View District Students* from the **My Account** tab.
- **ICONS:** Use the magnifying glass icon on any window that has a captioned Search option. You may use your mouse to "hover" over any icon to read the function that the icon symbolizes.
- **PRINT TO PDF:** On the Saved Sessions screen there is a 10 to 15 session limit on the number of checkboxes to mark for the Print to PDF function. The number will vary depending on the limit assigned by the district's IT department
- **ASK QUESTIONS:** Call (1-877-897-8283) or email TSBS with any questions at any time. Use info@tsbs.cc to receive a response within a 2 hour turnaround. Be sure and include your phone number also.