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/

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 time login you will be directed to the Reset Password page and prompted to change your password according to HIPAA requirements. (See next page for first time login.)

After entering your information, click the Login button. You will be directed to the Service Hours 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.
Reset Password

HIPAA regulations require a strong password on accounts that access sensitive data. We ask that your new password meet the following criteria:

- 6 to 15 characters in length
- Contain at least 1 upper-case letter
- Contain at least 1 number
- Must be personal and private to you
- Must not contain significant portions of your e-mail address, your full name, or the default password
On the My Account Page, you will be able to reset your password, choose activities for the Enter Service Hours Page, and Set IEP Limits if that option has been activated by your district.
Selecting *Choose or Enter Activities* from the My Account page will take you here:

Here is where you may choose activities that will show in the Activities drop down when Entering Service Hours. The Assigned list will already be populated. To remove activities you do not need, simply click the activity and it will move to the Unassigned window. All activities listed as Assigned will show up in the Enter Service Hours section. If you do not see an activity you want, use the Add New Activity function at the bottom of the page. All changes save automatically.

To start entering your sessions, you must first build your Student Caseload. The Student Caseload should include the students that you provide services for. You may include both Medicaid and Non-Medicaid students.

Click the *Edit Caseload* tab to begin.
BUILDING STUDENT CASELOAD

You may add or remove students from your caseload. For this action, click on the **Edit Caseload** tab. The **Student Records** window will appear.

**ADDING/REMOVING STUDENTS TO CURRENT CASELOAD**

Use the drop down box next to **District** to select the district for each student. A caseload may be set up for each district within a co-op, or each district you work in.

You may add students to your caseload by clicking on the student in the Unassigned window. This will move him/her to the Assigned window, meaning he or she is now in your caseload and will be available for billing in the Enter Service Hours Window. To remove a student, simply click on him/her in the Assigned window and he/she will be moved back to Unassigned.

You may also search for a specific student to add by clicking the search icon above the Unassigned window.

*Please note:* You no longer need to save your caseload as you had to in older versions. EPIC automatically saves your caseload as you add to it.
Add a Student to the System

If you do not see a student that you work with in the Unassigned Students window, you can send a request to add a student.

Complete the required information, including whether the student has SHARS services required in their IEP, and click Send Request.

Please allow one to two business days for updates to take effect. You will receive a confirmation email sent to your EPIC Login email address when student has been added.
Student IEP Limits

After your caseload has been built you may then set the IEP limits for each student. This is an optional feature so check with your Special Education department to determine school policy on its usage. Selecting Student IEP Limits from the My Account page will take you here:

Following the instructions at top of window, you may specify the period and prescribed minutes for that period. As claims are submitted to TSBS, a running total will be kept of the therapy minutes; if the minutes ever exceed the prescribed minutes, the student name will be highlighted on the Saved Sessions window.
ENTERING SERVICE HOURS

To enter services provided to the students in your caseload, return to the Enter Service Hours tab. Ensure your name is listed beside Practitioner. If not, please go to the Contact Us tab and report this to the Webmaster. Do not proceed to enter sessions until we can correct this issue.

Service: A service area must be selected in order for you to choose a service code and activity from the drop down menus. If you provide different types of services, (e.g., personal care and nursing, or assessment and counseling) use the drop down box after Service to select the service area for the session you are entering.

Credentials: If your credentials change, (e.g., going from an assistant to a licensed therapist) let us know so that we can update your credentials.

School District: If you have set up caseloads for various school districts that you service, use this drop down menu to select the district for the student you are entering sessions.

Student Information

Click on the Student drop down box and select the student’s name.

In the example (next page), we have selected Jennifer Morris as our student.
Parental Consent Date (1) is now protected throughout EPIC and cannot be changed online. (Contact your TSBS Account Manager to make changes to this data.)

IEP Data and the Referral fields (2) are open and editable by the logged-in practitioner only.

Type in the date (3) or select a date of service from the pop-up calendar.

The pop up calendar will appear when you click in the Date window.
**Session Information:** Enter all data for each date of service. Use the codes listed below the record as a guide.

**Minutes** will automatically calculate after you enter **Start Time** and **Stop Time** when using the TAB key to move between fields.

The screen image below shows a **Group Therapy Svc Code** selected.

**NEW ITEMS:**
- It is no longer necessary to enter a colon between hours and minutes. For 1:30 pm, you may simply enter “130” and the application will correct the format. EPIC also now recognizes military time.
  - (example: start = 1245; stop = 130 or 1330 (military); will automatically add colons and calculate 45 minutes).
- The **Activities** section is now fully editable from the **My Account** page. Please see page 6 of this guide for details.
- There are now additional service codes for Absent, Holiday, Field Trip and Weather. Choosing any of these allows you to keep track of days a student was not in school.
Adding rows for additional dates of service

**DUPLICATE LAST ROW:** This function allows you to create additional dates of service based upon the Service Code, Start & Stop Time, Minutes, Activity and IEP Goal listed in the row above. (Dates of Service and Comments do not copy forward.)

**ADD NEW ROW:** This function allows you to create a blank row for dates of service.

Additional Function Buttons

**SAVE RECORDS:** This function allows you to save your work. It is recommended you Save Records often, as the system will not automatically save your data if you navigate away from this page, close your browser, or do not actively enter data for 50 minutes.

After you click Save Records, the information will be moved to the Saved Sessions Tab (See page 19). You will get a new Session page to start entering information for another student.

**PRINT RECORDS:** This function opens a separate window from which you can print your session. It is recommended you Save Record prior to printing.

**SUBMIT TO TSBS:** This function allows you to submit your Session Information electronically to Texas State Billing Services. Reminder: Please print and sign your session to keep for audit.

**DELETE:** To delete a row, click on the RED X at the end. You may not delete after the session has been submitted.

NOTE: If you are doing OT, PT, Counseling, or Psychological Services you will see the screenshot above. If you are doing Speech, Nursing, Psychological Testing (formerly Assessment), or Personal Care, go to Pages 15 - 19 to see information for completing and selecting Service-specific codes and activities.
SPEECH SERVICES

4 new Speech Evaluation codes have been implemented in EPIC 2015-2016 to replace one code which formerly covered all types of Speech Evaluation. The Centers for Medicare and Medicaid mandated these changes and ASHA has detailed them here:
http://www.asha.org/Practice/reimbursement/coding/New-CPT-Evaluation-Codes-for-SLPs/

The 4 new Evaluation descriptions are:

- Evaluation of speech fluency (e.g., stuttering, cluttering)
- Evaluation of speech sound production (e.g., articulation, phonological process, apraxia, dysarthria)
- Behavioral and qualitative analysis of voice and resonance
- Evaluation of speech sound production (e.g., articulation, phonological process, apraxia, dysarthria); with evaluation of language comprehension and expression (e.g., receptive and expressive language)

(Please note that the 2nd and 4th Evaluation categories may not be claimed on the same date-of-service; both will be declined for payment by TMHP.)

The drop down menu of Svc Code lists all 4 Evaluation categories (in abbreviated format) as well as the Group, Individual, Consultation, Absent, Holiday, Field Trip and Weather selections used previously.

The Type/Qual drop down is a required field if any of the Evaluation categories is selected for a given date-of-service. The Type-and-Qualify values are unchanged and remain as: Initial Eval/Qualified, Initial Eval/Not Qualified, Re-Eval/Qualified, and Re-Eval/Not Qualified.

Start and Stop Times are required fields for any Evaluation, Group, or Individual therapy.

Minutes are automatically calculated by the system from start/stop times entered by provider.

Activity, IEP Goal, and Comments/Progress fields are not required by the system; most providers utilize them to fully document and describe the sessions with the student.
# Service Hours

## Practitioner Information

**Practitioner:** Robbie Ewen  
**Service:** Speech Therapy  
**Credentials:** SLP  
**School District / Co-Op:** Texas ISO

## Student Information

**Student / Medicaid ID / DOB:** Ryan Sydney - 518099602 - 12/15/1995  
**Parental Define:** No  
**Parental Consent Date:**  
**Referral/Prescription By:** Dr. Rachel Madison  
**Date of Referral/Prescription:** 4/15/2015

## Session Information

<table>
<thead>
<tr>
<th>Date (MM/DD/YYYY)</th>
<th>Svc Code</th>
<th>Type/ Qual</th>
<th>Start Time (hh:mm)</th>
<th>Stop Time (hh:mm)</th>
<th>Minutes</th>
<th>Activity</th>
<th>IEP Goal#</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/03/2015</td>
<td>Eval Speech Fluency</td>
<td>Initial Qual</td>
<td>10:00</td>
<td>10:30</td>
<td>30</td>
<td>Picture Cards</td>
<td></td>
</tr>
<tr>
<td>08/03/2015</td>
<td>Behav &amp; Qual Analysis of Voice &amp; Reson</td>
<td>Re-Eval-Qual</td>
<td>11:00</td>
<td>01:00</td>
<td>120</td>
<td>Social Communication</td>
<td></td>
</tr>
<tr>
<td>08/04/2015</td>
<td>Eval Sound Prod w/ Lang Comp &amp; Expr</td>
<td>Re-Eval-Qual</td>
<td>01:00</td>
<td>03:00</td>
<td>120</td>
<td>-- Select --</td>
<td></td>
</tr>
<tr>
<td>08/06/2015</td>
<td>Group Therapy</td>
<td>-- Select --</td>
<td>08:00</td>
<td>09:00</td>
<td>60</td>
<td>Worksheets</td>
<td></td>
</tr>
<tr>
<td>08/11/2015</td>
<td>Individual Therapy</td>
<td>-- Select --</td>
<td>08:00</td>
<td>09:00</td>
<td>60</td>
<td>Computer</td>
<td></td>
</tr>
<tr>
<td>8/12/2015</td>
<td>Absent</td>
<td>-- Select --</td>
<td>N/A</td>
<td>N/A</td>
<td>0</td>
<td>-- Select --</td>
<td></td>
</tr>
<tr>
<td>08/12/2015</td>
<td>Consultation</td>
<td>-- Select --</td>
<td>07:30</td>
<td>08:00</td>
<td>30</td>
<td>-- Select --</td>
<td></td>
</tr>
</tbody>
</table>

**Svc Code:** G = Group Therapy, I = Individual Therapy, C = Consultation  
**IEP Goal:** A = Articulation, L = Receptive and Express Skill, F = Fluent Speech, V = Vocal Quality/Response, PL = Prelanguage Skill, PH = Phonology, Au = Augmentative Communication Skills  
**Comments/Progress:** ++ = Student shows significant progress, + = Student shows progress, - = Student shows no change, -- = Student shows regression, ---- = Student shows significant regression

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The shortcut buttons will auto-populate a full month of weekdays for recurring days of service.

Nursing services has Svc Codes of M – for Medication Administration, I – for Individual Service and G – for Group Service. The hyphen (-) Svc Code may be used as a placeholder. Absent, Holiday, Field Trip and Weather document the reason for missed days of service.

M does not require a Start Time and Stop Time, but does require an entry under Visits/Minutes. Enter the number of visits (1-4) for Medication. Do not leave this blank.

I and G require Start Time and Stop Time, and Activity. Minutes will automatically calculate after you enter Start Time and Stop Time when using the TAB key to move between fields.
If you do not see the “Qualify” field, make sure Psychological Testing is selected in the Service area drop down box.

**Eval Type:** Initial Evaluation, Re-evaluation, Absent, Holiday, Field Trip and Weather

**Minutes:** will automatically calculate after you enter **Start Time** and **Stop Time** when using the TAB key to move between fields.

**Qualify:** Use the drop down box to indicate whether student qualified for Special Education. This is a required field.
PERSONAL CARE SERVICES

After initial login, you will be redirected to the **Personal Care** tab.

The Personal Care tab allows you to enter start and stop time for the day, deduct time for other services or inclusion classes, and check off all activities for the day.

Either shortcut button, when selected, will auto-populate a full month of weekdays for recurring days of service.

Total PCare Time (in minutes) will automatically calculate after you enter **Start Time** and **Stop Time** when using the TAB key to move between fields. **Minutes** will be deducted for any time entered in the Other Services fields.

Check all appropriate boxes in the Activities fields to indicate services provided. If an activity is not listed, you may use Other and write in the activity in the field provided to the right.

Please see page 14 of this guide for the description of the function buttons that appear beneath the claim form.
SAVED SESSIONS

We will now go to the Saved Sessions tab.

VIEWING/FILTERING OPTIONS

SAVED SESSIONS: This entire window allows you to see various views of Saved or Submitted records.
(If your district is using SuperUser Approval, you will also have Pending and Returned records.)

Use the “Status” drop down menu to choose which group you’d like to view.

• **Saved:** All saved sessions still available to be edited and submitted. Red sessions contain data errors that must be corrected before able to Submit. Green sessions may be submitted at any time and contain no errors.

• **Submitted:** All submitted sessions that you can either view or edit (before the next Monday.) Submitted sessions will be in black font if the student has a numeric Medicaid ID or light gray if the student is Non-Medicaid. (i.e. NM0983119)

• **All:** This function allows you to see all sessions: saved and submitted.

**PAGE:** This box allows you to switch between pages of sessions under the filter selected (e.g. Submitted/able to Edit, Submitted/View only or Saved/able to Edit or Submit)

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

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

**Dflt function:** This function is the Default; whenever it is clicked, it will reload with the most recent 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 (i.e. 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 (i.e. contains, does not contain, equal, less than, etc.)

Viewing a Saved Session: Clicking on View opens up a second window, which allows you to view or print a session. You cannot submit from this window.

Editing a Saved Session: Clicking on Edit allows you to edit or submit a session. You may print from the “open for edit” window but it is not recommended until you have saved or submitted.

Copying a Saved Session: Clicking on Copy allows you to use a session as a template; copying all information in the session, such as student, number of rows for service, time, and activities. Dates of Service and Comments will not copy forward.

PDF or Submit function on checkmarked boxes: These functions allow you to print and/or submit multiple sessions at once. Simply checkmark the boxes on far left (up to 15 at a time) to indicate the green Saved sessions to submit or the Submitted sessions to Print to PDF.

Cols function: 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 or Hide list.
Customizing your Saved Sessions window:

Any column heading name may be dragged and dropped into a different sequence on the Saved Sessions window. (i.e. Move Last Name to the right so that First Name is after Status)

After customizing your window, be sure and click the Save function to save your new layout and settings.
**Additional Options:** (Click on the links or logo)

**EPIC Logo:** This will take you to the EPIC website homepage ([http://epic.tsbs.cc/](http://epic.tsbs.cc/))

**Logout:** This will terminate your session. You will need to save all data 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 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

• **SAVE RECORD:** Save your session records frequently when entering data; the system will automatically logout after 50 minutes in order to comply with HIPAA Security requirements.

• **CTRL+F5:** When incorrectly entering data for a student’s session record use Ctrl+F5 to refresh the screen and “start over”; no data will be saved.

• **50 ROWS:** Each session record, also known as an EPIC claim, holds a maximum of 50 rows. Each row corresponds to a DOS (date-of-service). It is recommended to only create a session record for a month of daily therapy sessions at maximum. This limit is for clarity and documentation, and ease of search access on the practitioner’s hardcopy log in the event of an audit.

• **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 Unassigned list on the “Edit Caseload” 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.