TSS EPITOMAX DIRECTIONS

Epitomax Website: https://my.epitomax.net/epitomax/login.jsp

Browser: Use Chrome or Firefox only

The following directions outline how to complete your TSS Daily Report. You must review them in their **entirety.** There is **VERY IMPORTANT** information for you on the pages near the end, no matter how you choose to submit your "paperwork".

1. You may receive "Pop-Up" notifications on your computer. Please see the directions for "enabling pop-ups" (available on Moodle) or you can "Google" How to Enable Pop-Ups for your computer (PC or MAC) and browser (Chrome, Firefox) prior to entering information. It will then allow the pop-ups only in Epitomax.

2. Certifying Signature sheets (explained later) are also in a separate document and available on Moodle. You must use a different one for each client; one sheet per client per billing week.

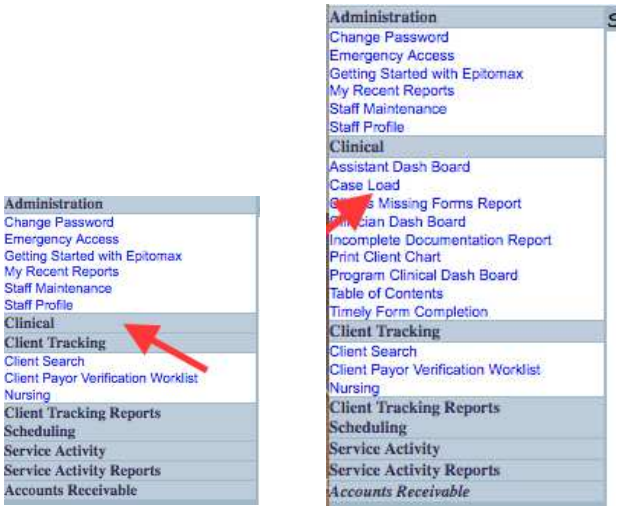
Log in to Epitomax with the user ID and password you have been provided.
Change password if prompted.
If you can't remember your password, click on that prompt.
Your password must be changed every 90 days, so choose one that you can make a minor change to each time (change a number, etc.)

Within Epitomax, BSCs and MTs are Clinicians, and TSSs are Providers.

PCAs will not use Epitomax for their PCA clients.

Your default "opening page" may be your Case Load page.

If it does not say *"Case Load,"* you can get to your *Case Load* page by clicking on *Clinical* to the left, and then on *Case Load*.



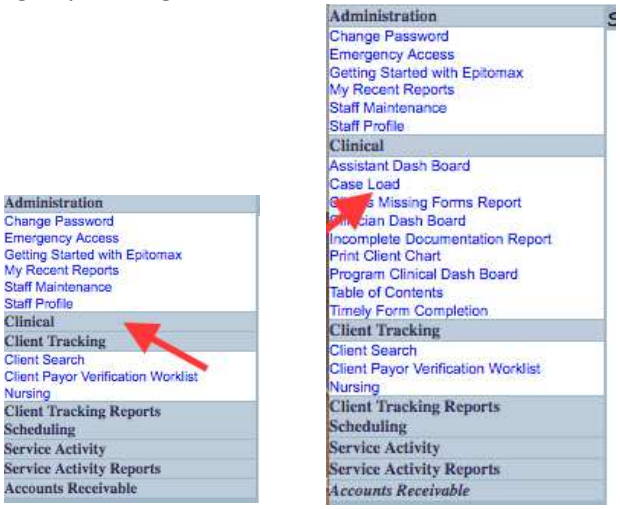
Prior to completing your first note or timesheet, you must enter your professional credentials into the system. If your information changes, you can re-do this, and the next form you submit will then have the new credentials. Follow these steps.

Click on Administration on the top left side of the page.
Then Click on *Staff Profile*

Enter your information in this format:
H&CS Position Academic Degree(s) License and/or Certification (if appropriate)

Click UPDATE *(bottom left of page).*

Now return to your **Case Load** page by clicking on *Clinical* to the left, and then on *Case Load.*



The Electronic Timesheet and TSS Daily Report

<u>This first part of the TSS Daily Report is your Electronic Timesheet.</u>

You are required to enter the Electronic Timesheet Information directly into Epitomax even if you choose to complete the remainder of the TSS Daily Report by hand.

The Epitomax Electronic Timesheet is on Page One of your TSS Daily Report, up to and including the "Method of Submission.

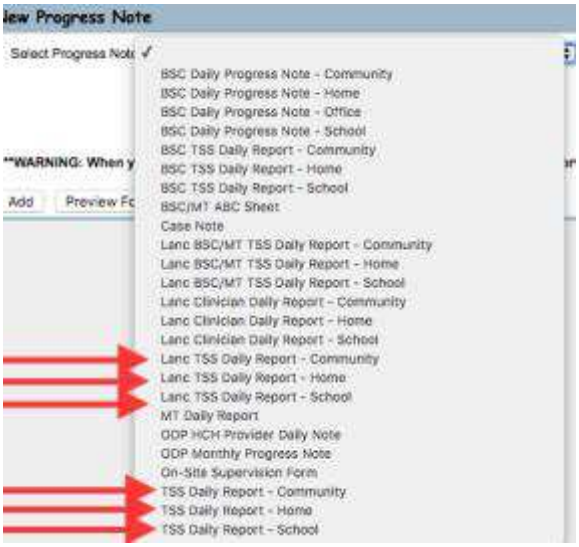
You should already be on your Case Load page, which looks like this
(it says Case Load on the top left and should have your clients' names listed):

<u>If not, to get to your Case Load Page:</u>
First click on Clinical *(from the column on left),* **and then on Case Load**

View names in your list of clients. If you don't see a client's name, contact your Case Management Team right away.

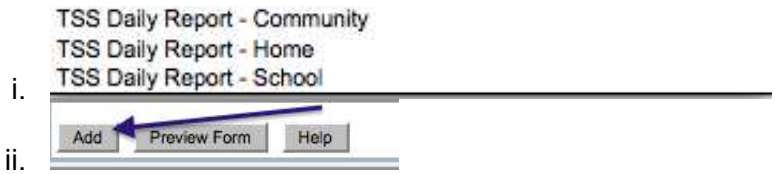
1. **See client's name. Way over to right of the name, click on "Add Note "**

2. Select the correct Daily Report according to *location* and also according to *county/location* for Lancaster. The Lancaster Daily notes will say Lanc.TSS Daily Report (Home, School or Community). Do not confuse TSS Daily Reports with notes that say BSC TSS Daily Reports. Your choices will be only from those seen here next to the red arrows.



3. **Enter your DATE OF SERVICE in the calendar box next to the drop-down.**

4. **Click "Add"**



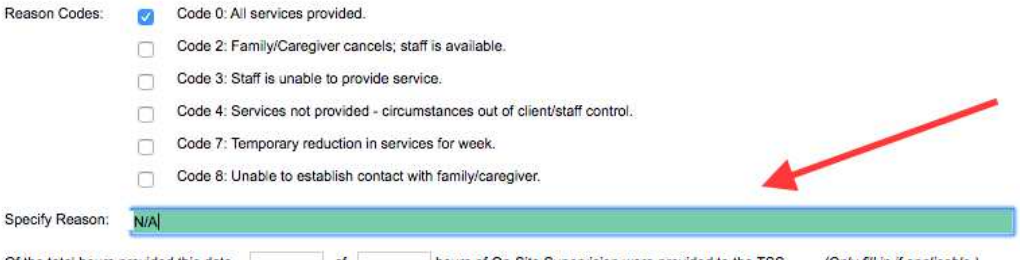
Your note will be on the screen after a few seconds. *Please allow a delay of between 3 and 10 seconds for pages to load or update due to the amount of data. The average wait is 4 seconds.*

If you can't see the entire width of the page, hover mouse over the black line until you see the +. Then drag it wider.

Any box in GREEN throughout this document must be typed into, either with content or with n/a (not applicable). Please complete all items below.

1. **Date of Service (should already be pre-populated)**
2. **Type in your next scheduled service date (mo/day/yr)**
3. **Type in your name. The Case Manager's name will pre-populate**
4. **Location will pre-populate**
5. **Activity will pre-populate**
6. **Start Times (up to two)—<u>must include AM or PM.</u> Enter End time(s)**
7. **Travel Time** *(decimal format in 15-min. increments- .25, 0.5, .75, 1.0, etc.)*
8. **Enter Daily Hours Authorized** into the green box *(decimal format in 15-min. increments: 0.25, 0.5, 0.75, 1.0, 1.25, 1.5, 2.0, etc.)*
    a. The Total Daily Hours Documented will populate <u>automatically</u>.
    i.

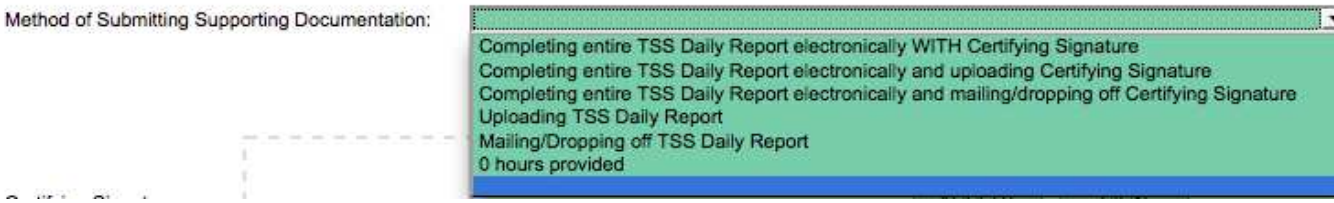
9. **Reason Code:** You can click on more than one box. **You <u>MUST</u> check at least one box.**



10. If <u>not</u> **Code 0**, type the **<u>reason</u>** in the box (see arrow above). <u>If you coded it a zero, put N/A in the box.</u>
11. **On-Site Supervision Documentation** (when applicable). Enter the # of hours of on-site supervision

12. **Who was present?** Click on all applicable boxes and/or fill in text box with "Other" information. **<u>Client and caregiver should always be present and that box checked off unless you provided zero hours</u>**

13. **Method of Submitting Documentation** *(choose one from the* drop-down menu).



14. **Click UPDATE at the bottom of the page**.

15. **Your Electronic Timesheet portion is now complete but you must review directions on the following pages prior to leaving the page.**

Do not click <u>Sign</u> if you are uploading anything or entering the entire report into the system. In that case, you sign once you have completed all necessary pages and/or uploads.

You will be signing using your electronic signature. Directions are below.
SIGN now <u>only</u> if you are hand-writing the remainder of the TSS Daily Report.

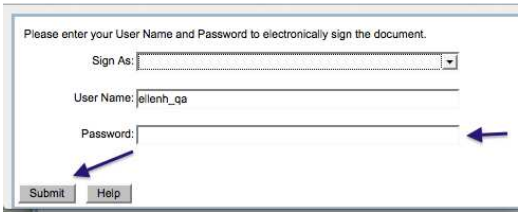
Please make sure that you sign (bottom of page) the timesheet portion of your TSS Daily Report electronically in order to submit it and then **mail in or drop off** your paperwork as usual, by the Tuesday following the billing week, with appropriate Certifying Signature directly on your note.

Your Electronic Signature:

Click SIGN

"Sign as" will be a drop-down or automatically populated. Be sure to enter "Provider" if it does not pre-populate. Enter your password.

Then Click **SUBMIT.**



Now you will be sent back to your caseload screen and your TSS Daily Note will close.

The timesheet section of the Daily Report that you just completed will now be available in the client's chart. Go to the Case Load page, click on Home and Community Services (see above) and you will see all documents completed for that client.

Review the instructions for submission of the TSS Daily Report on the next pages.

We strongly encourage you to complete the entire TSS Daily Report electronically. However, there are six options for submission:

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1. Hand-Writing and Mailing in/Dropping off TSS Daily Report

Please make sure that you sign (bottom of page) the timesheet portion of your TSS Daily Report electronically in order to submit it.

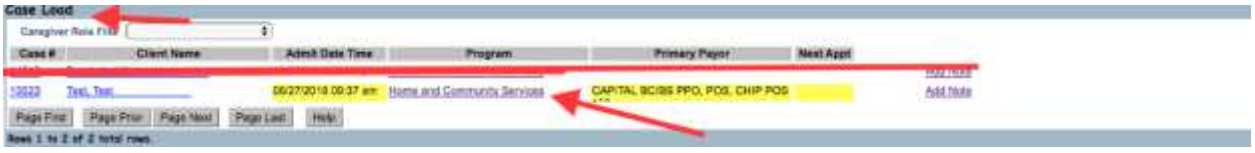
Then **mail in or drop off the remainder of** your paperwork as usual, by the Tuesday following the billing week, with appropriate Certifying Signature directly on your note. *This will be the data portion of your TSS Daily Report, since you completed the Electronic Timesheet portion directly into Epitomax.*

If you are hand-writing the remainder of the TSS Daily Report and uploading it to the system, please refer to the directions on uploading documents or Certifying Signatures later in this document.

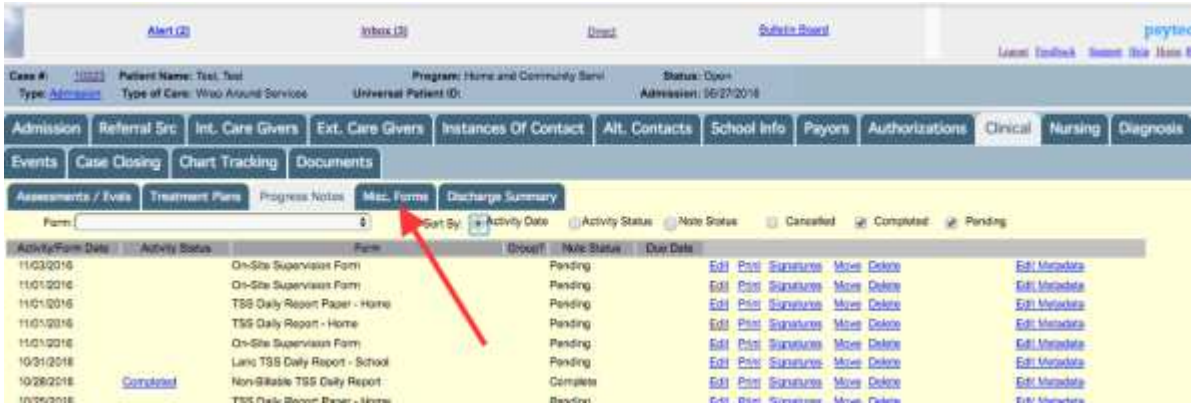
When hand-writing the remainder of your TSS Daily Report:

You must use the correct form. **It is titled TSS Daily Report-PAPER or Lanc (for Lancaster/Lebanon) TSS Daily Report-PAPER** and is found in the Misc. tab.

From your Case Load Page, click on **Home and Community Services**



Then click on **Misc. Forms**



From the Drop-Down menu, choose the correct one for your county and location:

- TSS Daily Report Paper- Home
- TSS Daily Report Paper- School
- TSS Daily Report Paper- Community
- Lanc TSS Daily Report Paper-Home
- Lanc TSS Daily Report Paper-School
- Lanc TSS Daily Report Paper-Community

There will be five (5) pages to print. See printing directions at the end of these instructions. If possible, you will want to print them out or copy them double-sided.

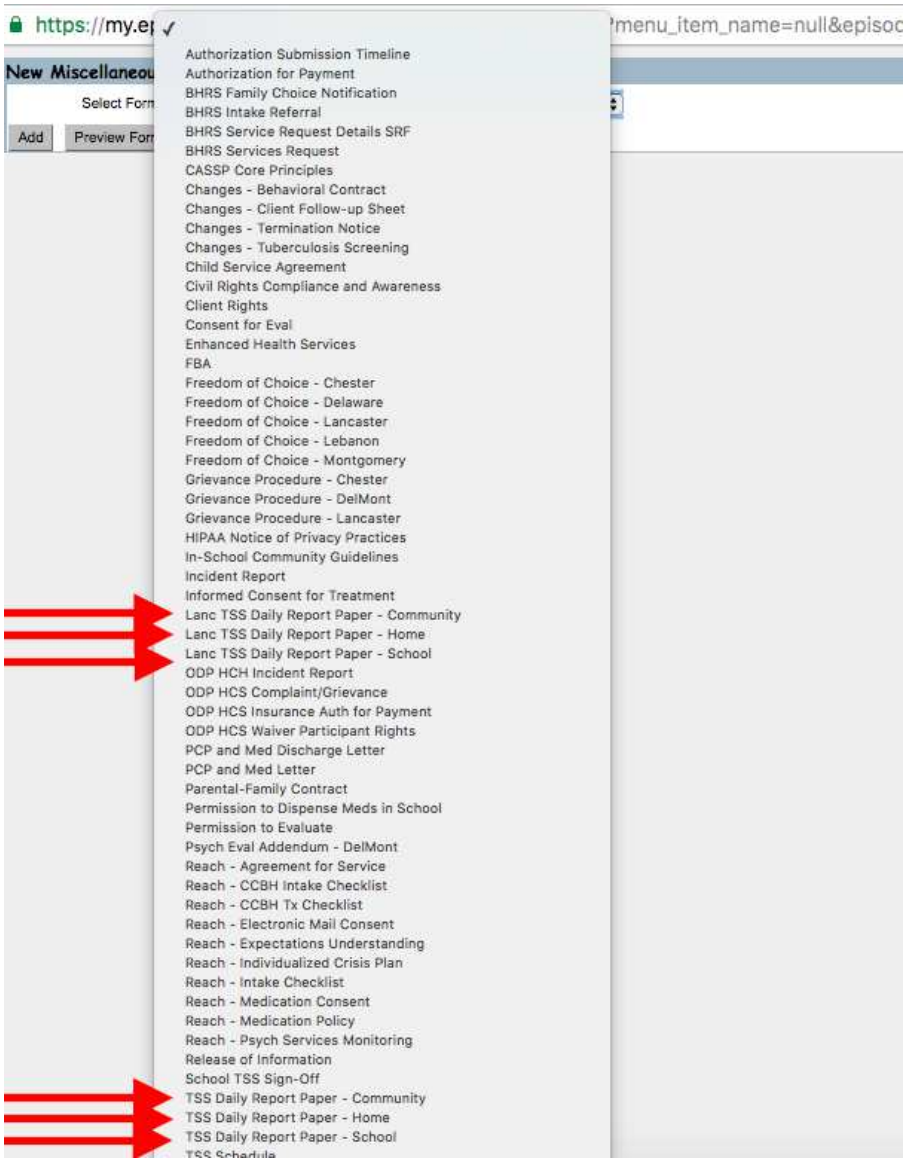
Page 5 is a signature page that will print out, but you don't need that. When making additional copies for future use, you only have to copy pages 1-4 and fill them out.

PRINTING your TSS Daily Report-Paper

The printing process will differ depending on the browser you are using.

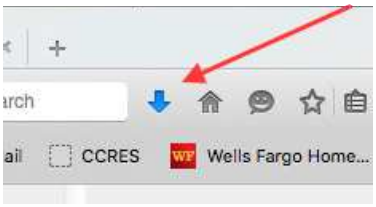
Go to the **Case Load Page**
For a Paper Note, go to the **Misc. Forms** tab on the Case Load Page. **Click ADD**.

Then click on the drop-down menu to select your paper note by location/county. They are listed alphabetically. Then click Add again.



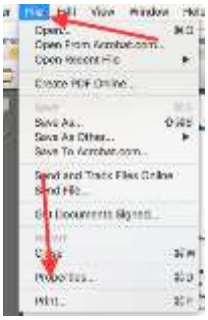
Click Print at the bottom of Page One. You will have to wait a minute for it to pop up, and it may look like a blank screen meanwhile.

The form must be downloaded to your computer. You may be able to view the download icon at the top of your screen to click on depending on your browser. The downloaded file will come up when you click on this.



Or.. you can go to the tool bar on your computer to File…. Save As…. (be sure to save it as a .pdf and name it.)

Click on File PRINT.



Choose the appropriate options.

Forms must be printed out in **Landscape** format or **Auto portrait/landscape** and **Fit.**
Click on All and then on two-sided if that is an option with your printer.
Then click on **PRINT.**

Using Chrome as your browser:

When using Chrome as your browser:

Click "PRINT" at the bottom of Page One of your Paper Note. There will be a delay with a mostly blank screen for up to 15 seconds.

Forms must be printed out in **Landscape** format (which may be automatic on the TSS Daily Progress Note).

Click on the download icon on the top right of the page when you are viewing the document and download it to your desktop. Or you can go to File…. Save As, and save it as a .pdf. Then you can go to File…Print.

Then bring up the downloaded form and click on the print icon.

Be sure to click these boxes:
Pages (Page range or **All**), Fit to Page, Two-Sided, and Print using System Dialog (in blue).

2. Completing Entire TSS Daily Report Electronically With Certifying Signature

Certifying Signature:

Click Update at the bottom of your screen.

- If you have a touch screen (phone or tablet), the signature can be entered directly, preferably with a stylus or a finger, and then click **"Accept**" after they sign. NEVER CLICK ON SIGN. Then click on **Update again.**

- You can also use your mouse or track pad to get the signature by hovering on the signature box itself. A pencil will appear. After they have signed, click "Accept." Then click on Update.

If you cannot capture the parent/guardian/teacher signature electronically due to lack of wifi or smart phone access, follow the instructions for how to upload a document/signature described later in this document or you can mail in or drop off the Certifying Signature Page.

Data (Tally Number) Boxes

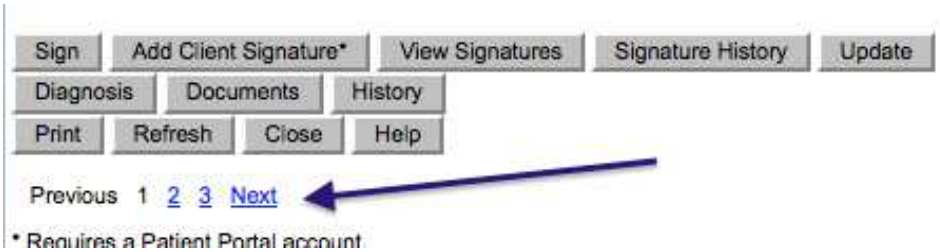
Problem Behaviors #1 and #2 (Page 1):

- The Problem Behaviors and Target (T) and Replacement (R) behaviors will be pre-populated.
- Fill in numbers in each box in the correct time column. You can keep tallies on a scrap paper and then type in the total number of behaviors in the applicable columns. It will total automatically on the right of the columns. Delete the zero and put in your total number for that hour in each applicable box.

CLICK UPDATE at bottom. Wait a few seconds. Then click on NEXT.

You can move between pages of the document by clicking on Next, Previous, or the page number at the bottom of each page. Be sure to update prior to moving off of your current page. Never click on the back arrow.

Even if you are not completing Page 2 of this note, you must go to Page 2 and click UPDATE at the bottom or Page 3 will not populate with the Problem Behaviors you need to complete the note.



PAGE TWO

Continue to fill out the data boxes if you have more Problem Behaviors and data to document (Problem Behaviors #3 and #4). If you haven't collected data for a Problem Behavior, leave the tally boxes blank and the total will be zero. You can type why there are no entries for that behavior in the Comments section at the end of the note.

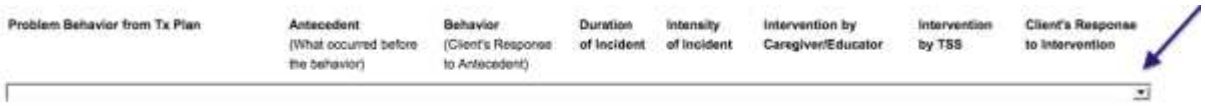
Even if you are not completing Page 2 of this note, you must go to Page 2 and click UPDATE at the bottom, or Page 3 will not populate with the Problem Behaviors you need to complete the note.

Click NEXT at the bottom.

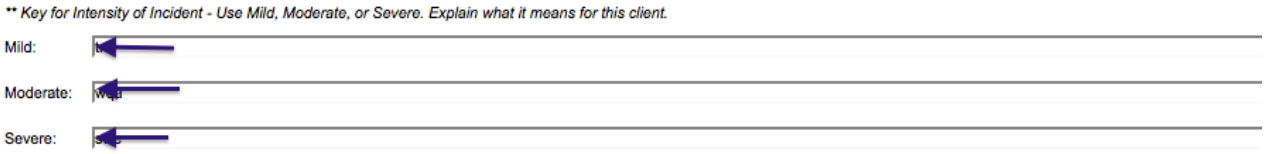
PAGE THREE

CODES for ABC entries:

Your BSC or Clinical Lead will have filled these sections in for you and they will be "coded" with numbers or letters (upper or lower-case). When you complete the ABC section at the bottom of the page, you will need to scroll up to view them each time prior to entering them below.



Your BSC or Clinical Lead will have also inserted the criteria for your client regarding the intensity of behavior (mild, moderate, severe). It is possible that these criteria will differ between clients relative to their individual behavior.



Problem Behavior ABC Data:

Using codes from the top of the page, you must provide at least one example of a behavior or behavior incident (either target or replacement) for which you collected data during this session.

If you collected data for each Problem Behavior in the Treatment Plan, there should be one example for each.

If you did not collect either target or replacement behavior for a designated Problem Behavior due to lack of opportunity, leave that Problem behavior section blank.

You have the opportunity to enter a maximum of three Antecedents (*ex: demand given and offered a choice),* Behaviors *(ex: kicking, yelling and dropping to floor)* and Interventions *(by both Caregiver and TSS)* for each behavioral incident, whether it is a problem behavior or a replacement behavior, using the letter/number codes from above.

If you should incorrectly choose an antecedent, behavior, etc. from the drop-downs on Page 3, and you want to delete the number or letter, just click the checkmark (√) on the drop-down instead. There is no way to delete it completely.

Duration: Type in the duration of the behavioral incident when applicable *(use seconds or minutes- you can type this in)*

Intensity: Drop-down- Choose one

Client's Response: Drop-down menu-Choose one

Safety Concerns: Free text box. Type in.

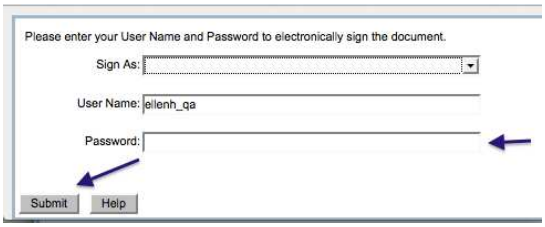
Additional Comments: Free text box. Type in.

Click UPDATE

Click SIGN

"Sign as" will be a drop-down or automatically populated. Be sure to enter "Provider" if it does not pre-populate. Enter your password.

Then Click **SUBMIT.**



Now you will be sent back to your caseload screen and your TSS Daily Note will close.

Important: *If you receive an error validation message, you must go back to the sections noted and complete them. It may be that you left a required box empty. If you have nothing to enter in there, be sure to type N/A. When you have filled in all required sections noted in the validation message, be sure to update each page, and then sign your note again at the end.*

The Daily Report that you just completed will now be available in the client's chart. Go to the Case Load page, click on <u>Home and Community Services</u> and you will see all documents completed for that client.

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3. Completing Entire TSS Daily Report Electronically and Uploading Certifying Signatures

Uploading Certifying Signature or the TSS Daily Report:

The following directions are for when you are scanning, taking a photo or screenshot, and uploading a Certifying Signature. Some of you may have apps available on your phones for scanning.

The Certifying Signature sheet is used for ONE CLIENT per sheet, per billing week, with space for up to 7 sessions. It is available on the homepage of Moodle-click on the picture icon.

Client: _____ Case Management Team: _____

Billing Week: _____to_____

one sheet per client per billing service week

Provider/Clinician	Date	Start Time #1	End Time #1	Start Time #2	End Time #2	Certifying Signature

All Staff:

If you are uploading the Certifying Signature, this sheet, with the corresponding date included, must be entered into Epicenter by taking a photo or screenshot of the sheet or of the corresponding row that contains the date of the session, and uploading with each Daily Report.

TSS:

If you are mailing (notepoping off the Certifying Signature sheet but are completing the TSS Daily Report electronically on Epicenter in its entirety, you must mail/submit it no later than Tuesday of the week following when the services were provided.

If you are completing the Daily Report by hand and mailing it in/tapping it off with the Certifying Signature included, you do not need the Certifying Signature Page.

Steps for taking a screenshot on a PC:

Steps for taking a screenshot on a Mac:

All timesheet entries must be completed in the Epicenter System.

You can upload the same Certifying Signature sheet for each Daily Report that week, even if it has multiple signatures that are not just for that specific day. Just be sure that the sheet is accurately filled in with your Name, the Date, Start and End Times, and the Signature.

- *You must save the Certifying Signature sheet to your desktop as a .jpeg (photo/screenshot) or as .pdf*

- You CANNOT upload attachments (ex: hand-written Daily Report or Certifying Signature page) to Epitomax directly from your phone. You must first email it to yourself, save it as a .pdf to your computer or tablet, and then upload it.

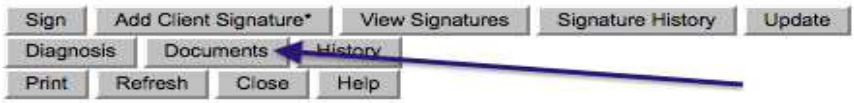
- You CAN obtain a signature directly on your phone (using a finger or stylus) or enter your Daily Report or Electronic timesheet (part of Page One) into Epitomax directly on your phone.

To Take a Screenshot and Upload to Epitomax:

- **Steps for taking a screenshot on a PC**
  http://windows.microsoft.com/en-us/windows/take-screen-capture-print-screen#take-screen-capture-print-screen=windows-8
- **Steps for taking a screenshot on a Mac**
  https://support.apple.com/en-us/HT201361
  Be sure to save your document/screenshot/photo on your computer as TSS Daily Report, Certifying Signature, etc. so it can be identified.

Important: *Save (the document or signature that you are uploading) locally to a computer desktop rather than to your phone, being sure to attach the actual picture and not a shortcut link or something of that nature.* ***You MUST save items to your computer or tablet desktop as .jpeg (photo/screenshot) or as .pdf***

- Go down to bottom- Click on **Documents**



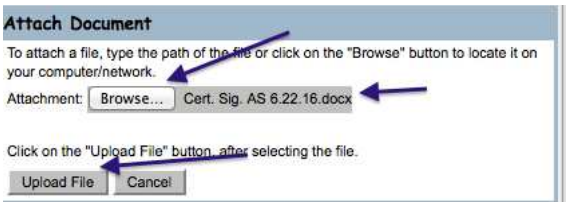
- View right side of page (move margins if needed)

- Choose **Certifying Signature** from the drop-down menu

- Click ADD

- Click Browse or Choose File *(this will pull from your computer)*
- Choose the identified screenshot, scanned or saved signature

- Upload File

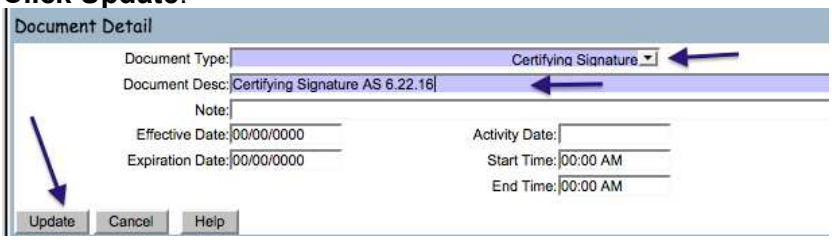


- Choose Document type (or Certifying Signature) from list.

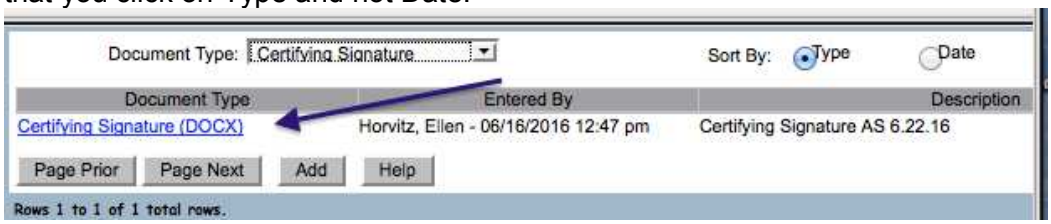
- **Be sure to save your document/screenshot/photo on your computer, using the following naming convention:**

  Document Type-client initials-date (written as 5-12-16)
  Example: Cert. Sig. JD 9-1-16

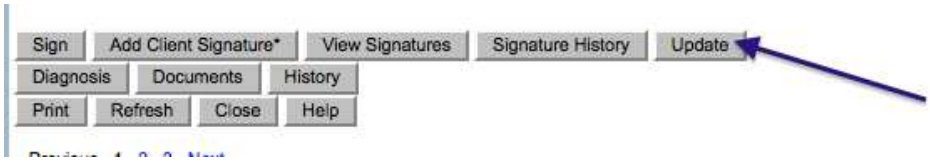
  Click Update.



  You will see the attachment title (certifying signature) appear in blue. Be sure that you click on Type and not Date.



Now look back on the main page of the Daily Report again, and Click <u>Update</u> at bottom of page

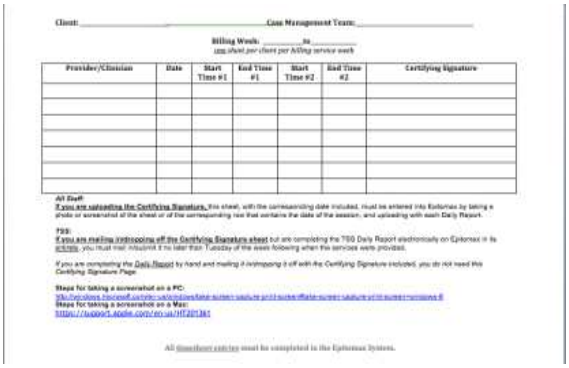


The TSS Daily Report that you just completed will now be available in the client's chart. Go to the Case Load page, click on Home and Community Services and you will see all documents completed for that client.

4. Completing Entire TSS Daily Report Electronically but Mailing in or Dropping off Certifying Signature

Follow the directions for completing the TSS Daily Report Electronically with Certifying Signature, but skip over the directions for how to obtain the Certifying Signature **and mail in or drop off the Certifying Signature Sheet instead.**

Certifying Signature Sheet:

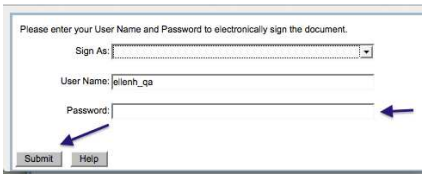


Please make sure that you sign your TSS Daily Report electronically in order to submit it.

Click SIGN

"Sign as" will be a drop-down or automatically populated. Be sure to enter "Provider" if it does not pre-populate. Enter your password.

Then Click **SUBMIT.**



Now you will be sent back to your case load screen and your TSS Daily Note will close.

The Daily Report that you just completed will now be available in the client's chart. Go to the Case Load page, click on Home and Community Services and you will see all documents completed for that client.

5. Uploading TSS Daily Report

You must use the correct form. **It is titled TSS Daily Report-PAPER** and is found in the Misc. tab.

Once you have completed your paper note in its entirety with your signature, the certifying signature and all data, you can upload it into Epitomax.

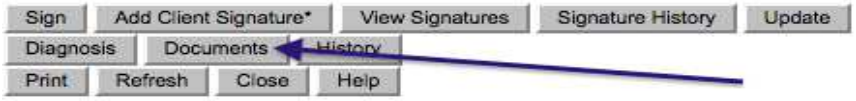
To Take a Screenshot and Upload to Epitomax:

- **Steps for taking a screenshot on a PC**
  http://windows.microsoft.com/en-us/windows/take-screen-capture-print-screen#take-screen-capture-print-screen=windows-8
- **Steps for taking a screenshot on a Mac**
  https://support.apple.com/en-us/HT201361

Be sure to save your document/screenshot/photo on your computer as TSS Daily Report so it can be identified.

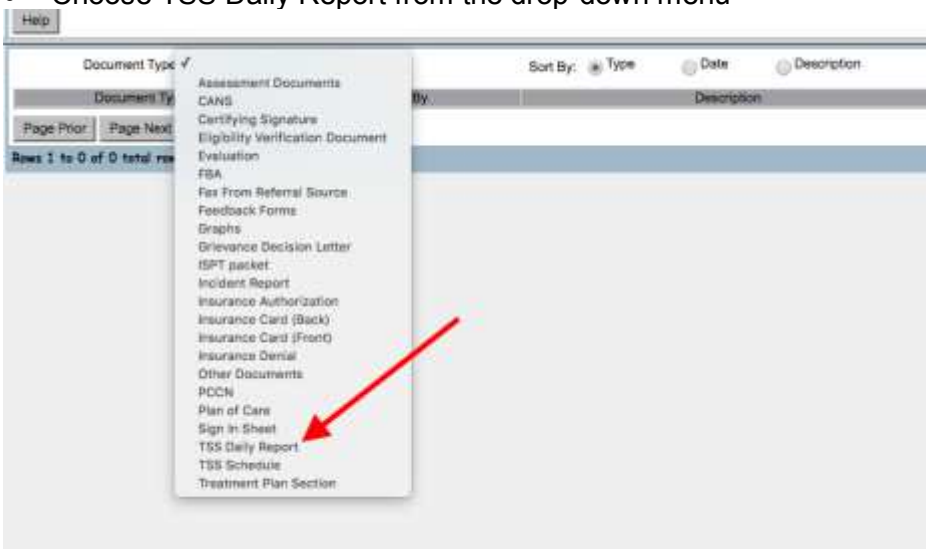
Important: *Save locally to a computer desktop rather than to your phone, being sure to attach the actual picture and not a shortcut link or something of that nature.* ***You should save items to your desktop as .jpeg (photo/screenshot) or as .pdf***

- Go down to bottom- Click on **Documents**

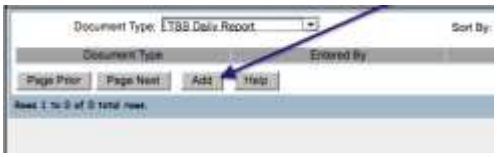


- View right side of page (move margins if needed)

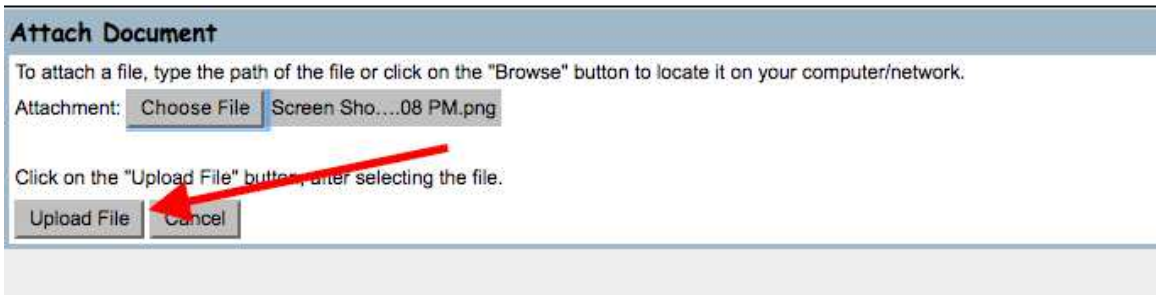
- Choose TSS Daily Report from the drop-down menu



- Click ADD



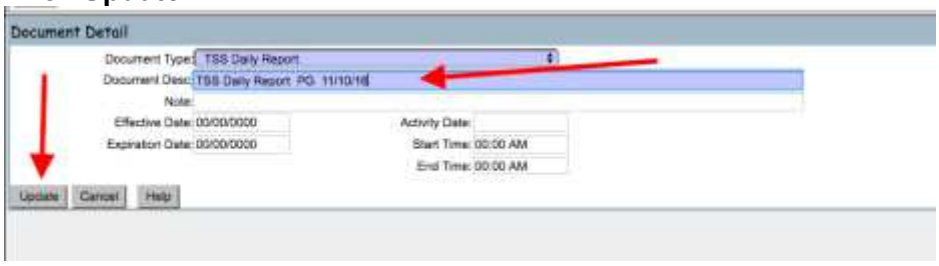
- Click Browse or Choose File *(this will pull from your computer)*
- Choose the identified screenshot, scanned or saved signature
- **Upload** File



- Choose Document type again from list.

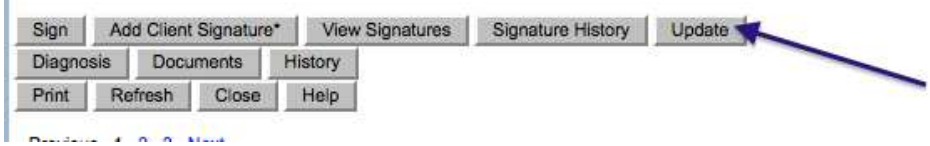
- **Be sure to save your document/screenshot/photo on your computer, using the following naming convention:**
  Document Type-client initials-date (written as 5-12-16)
  Example: TSS Daily Report PG 11/10/16

Click Update.



You will see the attachment title appear in blue. Be sure that you click on Type and not Date.

- **Now look back on the main page of the Daily Report again, and Click <u>Update</u> at bottom of page**



The TSS Daily Report that you just completed will now be available in the client's chart. Go to the Case Load page, click on Home and Community Services and you will see all documents completed for that client.

6. Zero Hours Provided

- **TSS**: Complete Page One of the TSS Daily Report up to and including "**Methods of Submission".**

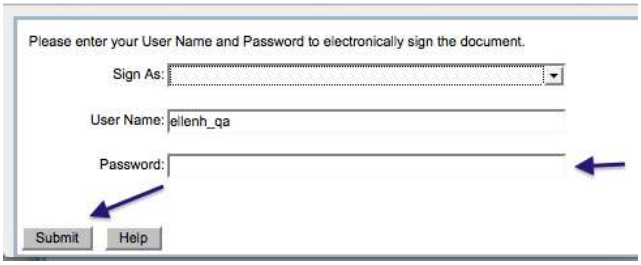
Your times should be entered as Start Time and End Time as the same time so they come out to zero hours, but you must be sure that these times do not overlap in any way with another session you are doing that day with any client. Our suggestion is that you choose a time in the middle of the night unless you are working in the middle of the night! If you are completing more than one Zero Hours Daily Report for that day, be sure to use different middle of the night hours! *An example would be 2:00 AM to 2:00 AM.*

Be sure that the Hours Provided show up as **Zero** (0).
Sign your note as indicated below.

Click SIGN

"Sign as" will be a drop-down or automatically populated. Be sure to enter "Provider" if it does not pre-populate. Enter your password.

Then Click **SUBMIT.**



Now you will be sent back to your caseload screen and your TSS Daily Note will close.

The timesheet section of the Daily Report that you just completed will now be available in the client's chart. Go to the Case Load page, click on Home and Community Services and you will see all documents completed for that client.

TSS On-Site Supervision

- *If you completed any designated TSS On-Site Supervision hours, complete your regular TSS Daily Report as usual, indicating your times in the applicable on-site supervision places.*

- One TSS Daily Report will have to be completed for each On-site Supervision Session.

- You only need to complete One TSS Daily Report for any day in which a TSS completes their On-Site Supervision hours but still has some hours left with the client during that session. (Ex: only 2 more hours of on-site supervision needed, but the session is 4 hours). Just indicate how many of those hours were for On-site in the applicable section.

Non-Billable Hours:

If you have been given advance permission by your Case Management Team to attend a non-billable session, generally for shadowing another staff or attending a Team Meeting, you must complete a "Non-Billable TSS Daily Report." All counties use this form.

Go to your Case Load page, click on "ADD Note" on right
Choose the correct form from the drop-down menu, and complete the form.

IMPORTANT NOTES:

- NEVER click the back arrow when in Epitomax.

- Prior to obtaining a Certifying Signature in Epitomax, or prior to Uploading the Certifying Signature sheet, remember to click **Update first** (bottom of Page One). Then you can **Accept** the signature or **Upload** a document. **Then click on Update again at the bottom of Page One of your Daily Report.**

- Once you complete a note, it will say "Pending" within the client's chart until the Case Specialist has approved it. It does not mean that you haven't completed it.

- Once the Case Specialist approves the note, it will change to "Complete," and you will know that it has moved on to Billing.

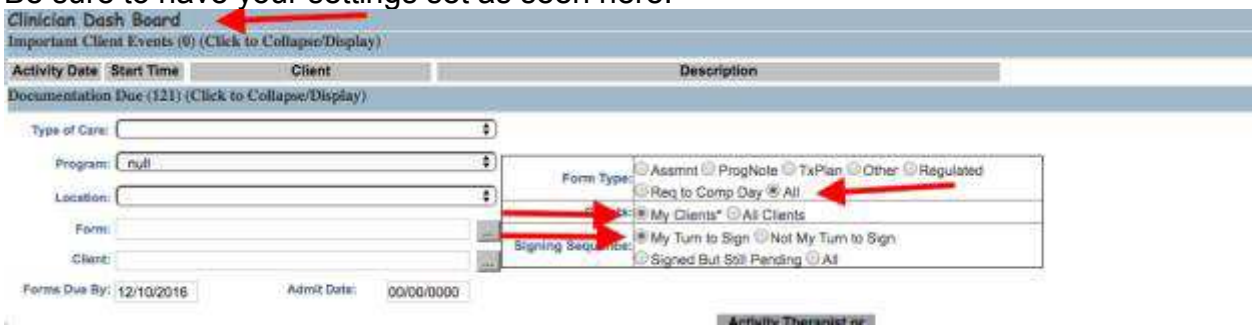
- If you make a mistake and need something deleted, please contact your Case Management Team for assistance. They can make deletions.

- Even if you don't finish a note, it will still show up in the client's chart. Do not add a new note if you have started one for that session already!! Go to the **Case Load** page, click on Home and Community Services, find the started note, and click Edit to complete or correct the note.

ATTENTION:

Before you log out, go to your Inbox at the top of your CLINICIAN DASHBOARD to see if you have messages or alerts. You can get there by clicking on Clinical on the left and then on Clinician Dashboard.

Be sure to have your settings set as seen here:



The **Inbox** messages will usually be information or tasks that you need to complete, sent to you by your Case Management Team. You must follow up on this immediately.

The **Alerts** will generally be system(Epitomax)-generated messages, error messages, etc. Click on Alert, then click on Open, and read the message. You must check these Alerts. They may have very important information about incorrect authorization or issues that must be immediately followed up.

If you see a number in your Inbox, it will indicate that there is a new message from the CM about changes you need to make to a form. Click on Open to view the message.

Now be sure to return to your Case Load page. *(Go to Clinical on the left, and click on Case Load).*

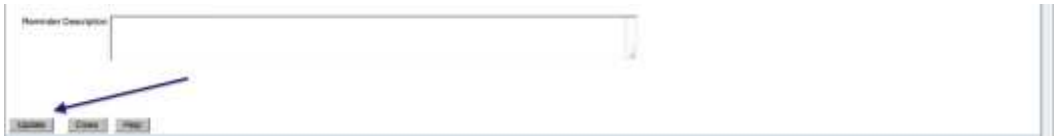
To search for the designated note or form indicated in the Inbox message from the Case Specialist, you will have to go to the client's name and click on Home and Community Services. This will bring you to the client's chart.

DO NOT START A NEW NOTE! You are editing an existing one.

For **Pending** Notes or Documents, Click on Edit next to the note about which you received the email from your CM. Be careful to choose the correct note or form by date/type of note or form and location when applicable.

Once your document is open, you may edit it as needed, making sure that you click **UPDATE** on each page for which you have made changes. Re-sign the daily report.

After editing the note, click on the Inbox again or just click on the Inbox tab already open on your computer. Click on Reply. Then write an email to your CM briefly explaining what you have completed or have further questions about, and click UPDATE. **Remember to copy yourself on the email.**



You may also see notes from your Case Management team regarding **Completed notes** (it says Completed on the left in the client's chart, which you get to by clicking on Home and Community Services from your Case Load page).

Click on **Edit** next to that completed note, and then Add Amendment at the bottom of the form (this will only work on completed forms, otherwise you can just Edit as shown above). Add the necessary information or changes to the amendment box that pops up and include the name of the section(s) of the form(s) that were amended and the new text. *For example: TSS Daily Note 10/1/16 Tally corrections for Problem Behavior #1, or incorrect dates, etc.*

Sign the amendment using your username and password as indicated. You will only be able to view your finished Amendment by clicking on Print (but just for viewing). You should see a red **A** show up next to your note, indicating Amendment completed.

If you see a **Comments** link to the right of the notes on the dashboard, please click on it and follow the directions. Usually there will not be any comments.

Do Not Touch "Today's Schedule" or "ADD" either at the side or bottom of this page.