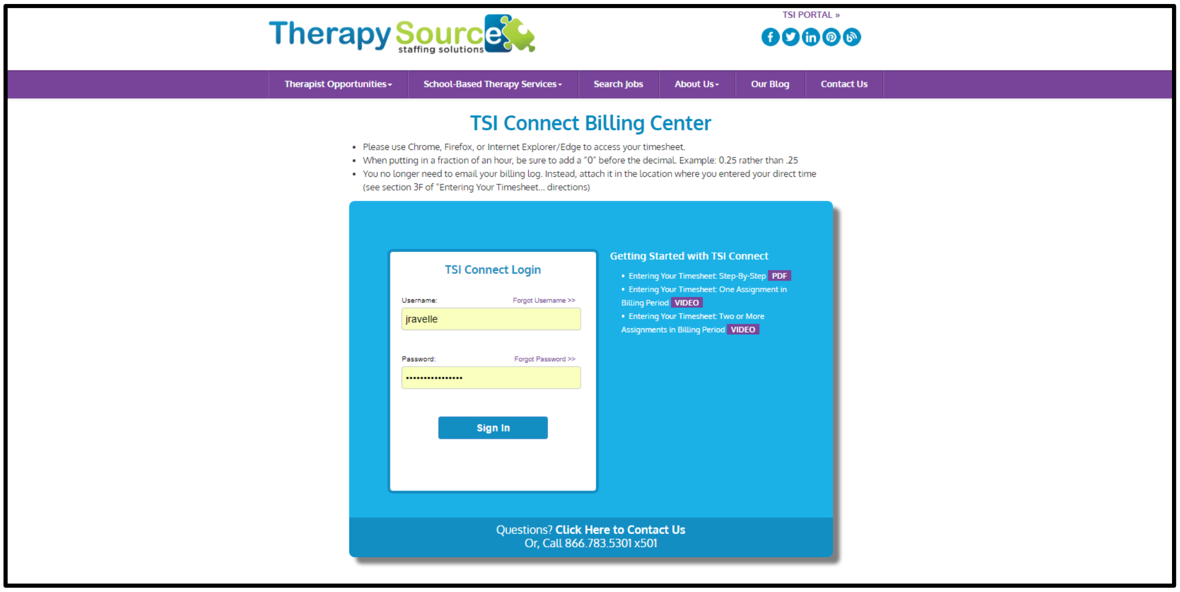
Entering a Monthly Timesheet in TSI Connect

1. Logging In

Visit: txsource.com/tsi-portal



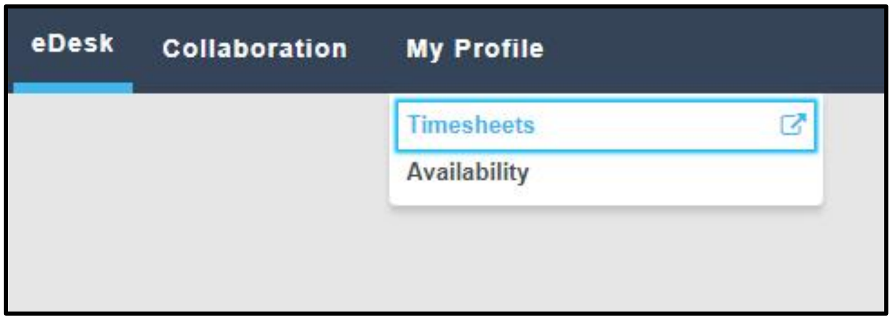
If it's your first time logging in: You will be prompted to enter your email address, username, and the password provided to you by Therapy Source. You will then have the option to select a password of your choice (but your username remains the same.)

For all logins beyond your first: you will just need to enter your assigned username and the password you selected, and click "Sign In." You will then be automatically taken to the TSI Connect dashboard, which looks like this:

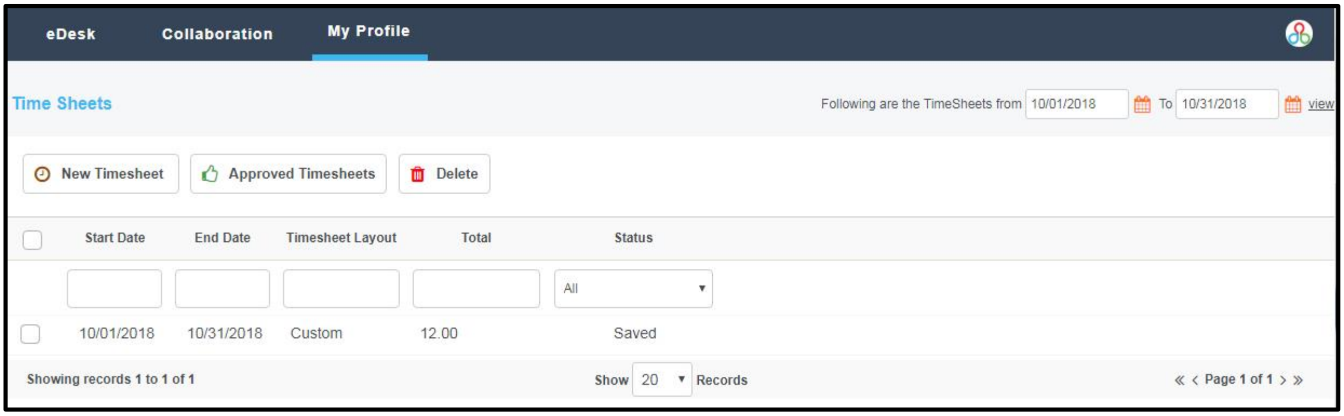
2. Accessing Timesheets

From the Dashboard: Hover over “My Profile” in the top menu and click “Timesheets.”

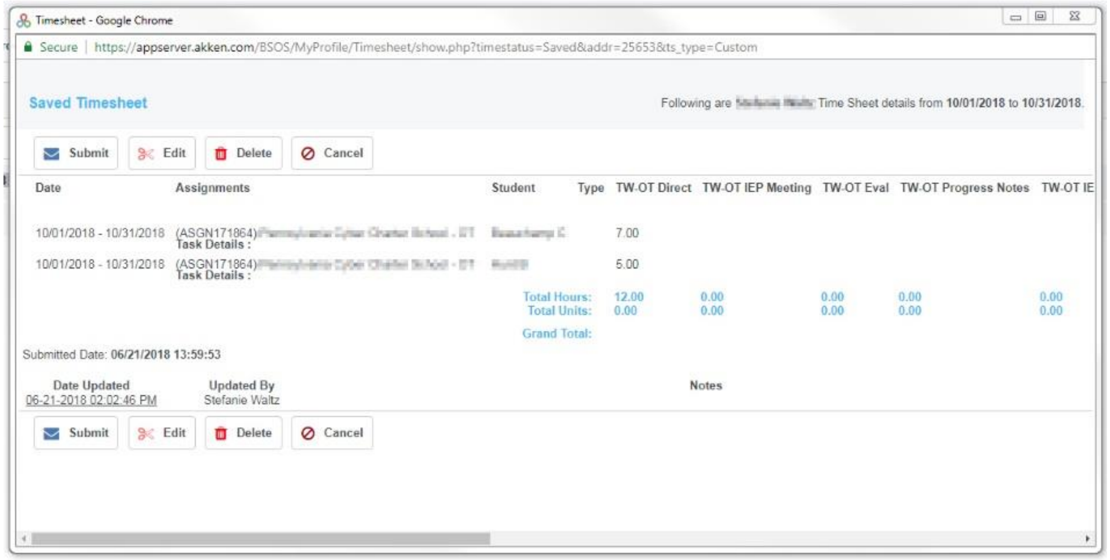
HINT: Clicking the icon to the right of the menu item ( ) will open the link in a new window/tab in your browser.



This screen will display all of your timesheets. To change the date range for the timesheets you wish to view, edit the dates in the upper right corner next to “Following are the Time Sheets From…To…” You can either type in a start and end date, OR click the calendar icon ( ) to select dates. Click “view” to show only timesheets within this date range. To display a greater number of records per page, click on the drop down between “Show” and “Records.”



Double-clicking on an individual timesheet will open a “Saved Timesheet” window with more details.

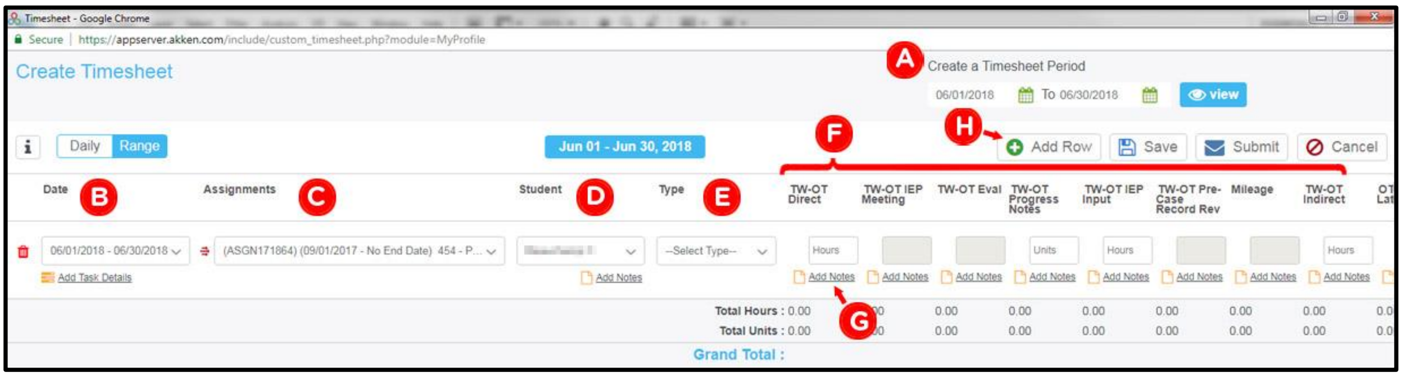


3. Creating a New Timesheet

Under “Time Sheets” in the upper left corner you will see three buttons:

- **New Timesheet** – Create a new time sheet
- **Approved Timesheets** – View a history of all submitted timesheets
- **Delete** – Delete an existing timesheet

To create a new time sheet: Click “New Timesheet,” and a “Create Timesheet” page will appear.



A. In the upper right corner of the window, you will see an option that says “Create Timesheet Period…” change the start and end date to the first and last day of the billing month. You can either type these dates in or click the calendar () icon.

- ➢ **Click “view” (**  **) to apply these changes.**
- ➢ **If submitting a single assignment within the one month billing period: click “Range,” and skip to step E (below).**
- ➢ **If submitting 2 or more assignments within the one month billing period: click “Range,” and move on to step B (also below).** ***Note: you will need to reset the date for each assignment/line item.***

What constitutes a Single Assignment vs. 2 or more Assignments?

- ➢ **Single Assignment:** Can contain any number of students, as long as all are within the same school, and receiving the same type of service (with type of service being in-person, online, or an evaluation) **Example:** If you are an SLP, and have provided in-person services to 5 students within a single school, this would be considered a **single assignment**.

- ➢ **2 or more Assignments:** Can contain any number of students. The 2 or more assignment directions should be followed when:
  - More than one service type is provided (with type of service being in-person, online, or an evaluation) **Example:** If you are an SLP, providing in-person services to 3 students — AND evaluations for 2 students — in a single school, this would be considered **2 assignments** (1 for each type of service provided.)
  - You are providing services in more than one school.

B. Date – Set the date for the item you would like to enter. Use the drop down list to select dates from within the billing month you've selected in Step A.

C. Assignments – All of your assignments will be included on the drop-down list. Select the corresponding assignment from this list.

D. Student - Students attached to the assignment you've selected will auto populate this drop down list. Select the student.

E. Type – Select the type of service provided. There are three options:

- REG: Regular session
- ESY: Extended School Year
- MAKE UP: Making up a missed session or compensatory time

F. Enter the # of hours for each relevant service. **Important Note: You will only be able to add hours/units to the sections that pertain to the assignment/student selected. Non-applicable sections will be grayed out.** When putting in a fraction of an hour, be sure to add a "0" before the decimal. Example: 0.25 rather than .25.

G. **How/Where to include your billing log:** Attach your billing log in the same location where you have entered your direct time (if more than one student is included on the billing log, you may attach it to any of the students on that billing log.)

Click "Add Notes" (or click the icon) to enter relevant notes and/or attach files (progress notes, in/out sheets, billing logs, mileage, etc.), as required by the individual school.

H. At the top of the “Create Timesheet” window, you will see a row of buttons:

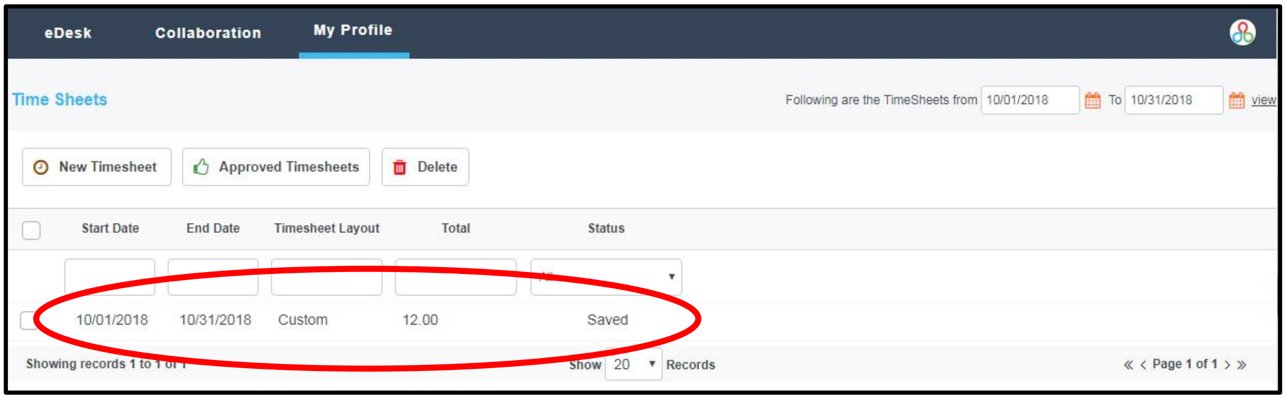
- Add Row – Add an additional row to the timesheet to enter data for another student
- Save – Save the timesheet and edit it / finish it later
- Submit – Submit your timesheet to billing
- Cancel – Cancel your changes to the timesheet

If timesheet is NOT complete and NOT ready for submittal:
Click “Save,” but NOT “Submit.”

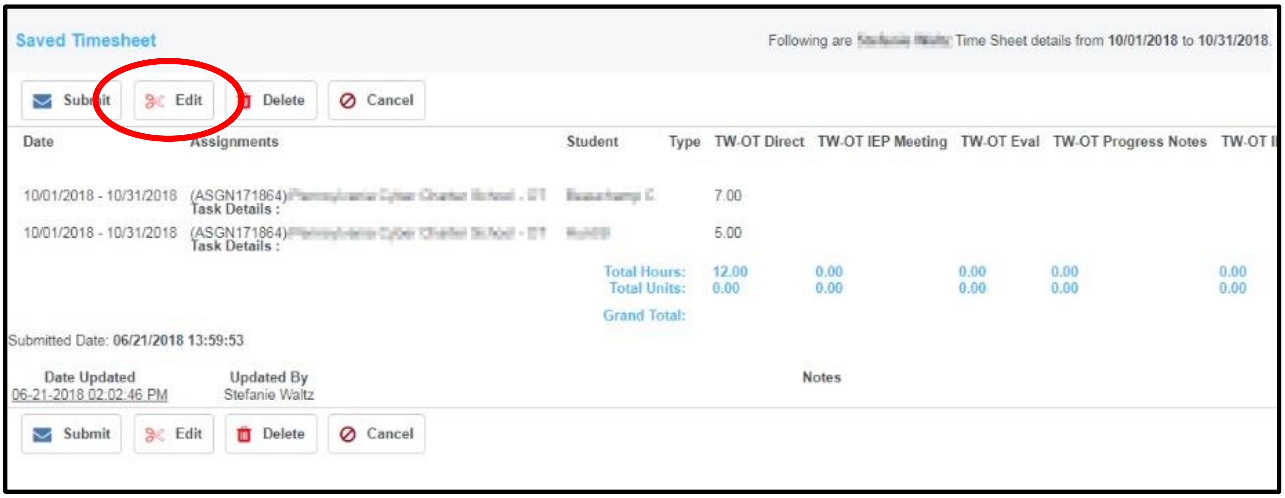
4. Adding Additional Rows to Your Timesheet

As long as your timesheet has been saved (but not submitted), you are able to enter additional rows. To do this:

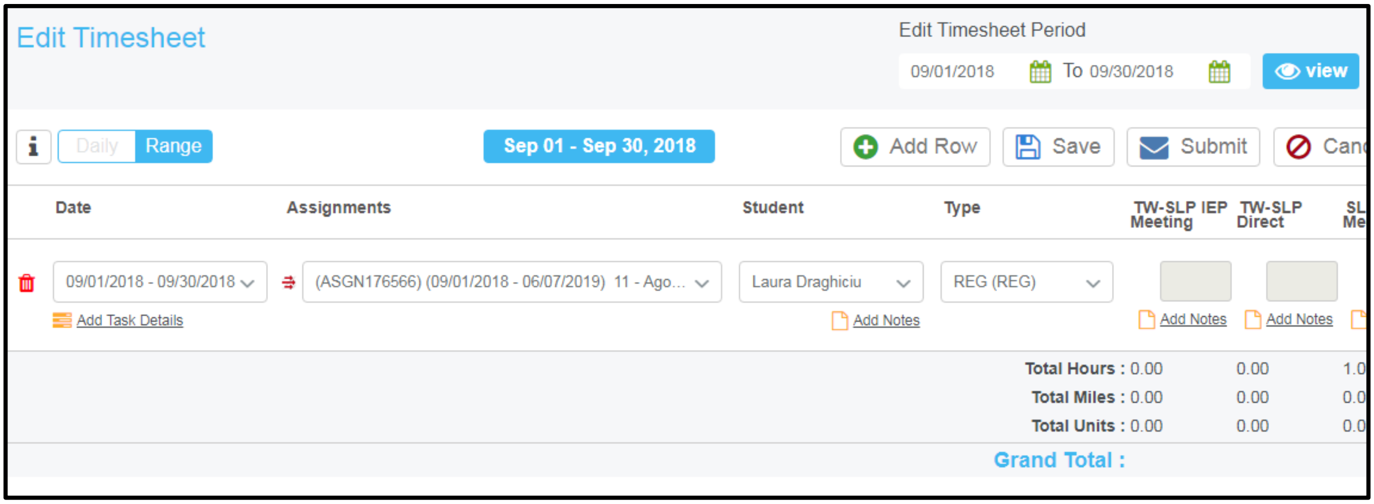
1. Double-click on your saved timesheet to open it.



2. Click on “Edit.”



3. Now you can edit your timesheet.



If timesheet IS complete and ready for submittal: **Click "Submit."**

Your timesheet is now submitted!