



The IMA Quarterly

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➤ New IMA Subsystem

An exciting new subsystem for managing forms and documents used in clinical and administrative applications is now available on the IMA Desktop. This is fully integrated within your current IMA database and represents a true hybrid of a Documents & Data Management system. Multiple implementation levels or stages are offered. Each stage progressively moves an agency one step further from a paper environment to the fully electronic.



Level I: The Forms Repository:

The system maintains a repository of your agency forms organized and listed by program and application. Forms may be added to the repository as MS Word documents, PDF forms, or scanned in. Client header information is pre-defined for each form. When the form is printed, the system will pre-fill the client and associated program header on the form. Printing may be directed to any system printer for a

single specific form or for all forms required for a specific program or function.

Level II: Tracking & Ticklers:

At this level, forms may be associated with an initial due date, recurring renewal periods, and/or other possible trigger points. The trigger dates may be specified as intervals from the intake date or other treatment milestones. Tickler reports, reminder e-mails, and Desktop HomePage ToDo list items may be generated as needed based on these triggers.

Level III: Online Fill-In & History:

Up to this point the system has maintained the forms, tracked them, and also filled in, automatically, the header information for each. The body of the form still had to be completed by hand, distributed, and filed in the paper folder. At this level, the full form is presented on the screen for fill-in. The completed form may faxed or e-mailed directly from the system to the appropriate destination. It is also automatically saved as part of the electronic client record for future retrieval and as a base for any renewals that may be required.

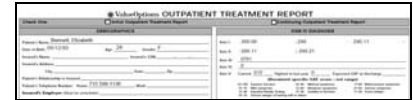
Level IV: Database Fields:

All of the data fields in a document become part of the IMA database! This also makes all the data fields in each form available via the ad hoc report generator. Different from level 3, where all the data is saved in document format which makes it usable for printing and copying for a renewal but not reporting.

OTR's for Managed Care (Outpatient Treatment Reviews)

This is a pre-packaged module that will facilitate the on-screen preparation of the various OTR documents specified by each of the

plans such as HIP, ValueOptions, etc. This new feature will be fully integrated into your Managed Care module which will now also have the capability to print or fax each of the specific OTR's as defined.



The OTR module is but an example of an application utilizing the new IMA Forms Repository sub-system. IMA did the configuration and definition work and is offering as a free standing optional module.

Pricing:

The license fee for Level I is \$5,000, Level II \$2,500 and the OTR module is \$7,500 including one specific form (e.g. Value Options, etc.) and \$2,500 for each additional Plan. Prices for Levels III and IV will vary by the application and will be quoted on an individual basis. Additionally, you should budget for implementation training and consulting in all cases.



➤ **Customer Highlight: Sound View Throgs Neck**



Introduction:

Sound View Throgs Neck Community Mental Health Center (SVTN - CMHC) has been a happy member of the IMA family since 1997. They serve nearly 4,000 clients in the Bronx area through their Continuing Day Treatment Program, Adult, Child and Geriatric Programs. In addition to the three On-Site programs they also operate within area schools. In 2001 SVTN was among the first of the IMA Users to make the Desktop transition. Today the IMA Desktop is featured on all of their PCs at both locations.

Clinical Rollout:

SVTN is now rolling out the full clinical application on the IMA Desktop including the new Forms Repository and the OTR module described in feature article above. This rollout represents a comprehensive overhaul, if you will, of SVTN's current clinical documentation practices. Until now, Sound View has utilized IMA predominantly for their vital billing and reporting functions. Now they are moving towards fully automating their clinical office procedures with the IMA Desktop. "Electronic records are the wave of the future," declares Sound View's Lance Levitt, "it promises to make you so much more efficient, there is no reason not to have it!"

The goals of IMA and SVTN's collaboration on this project are twofold:

1. to convert all the SVTN current clinical paper

charts and forms into electronic format.

2. to fully train all clinical staff how to utilize the converted electronic record.

Lance says:

"This system will make us more productive and better able to serve our clients."

We couldn't agree more!

This is truly an exciting event for SVTN, for IMA, and also for the rest of the IMA user community who will hopefully soon follow in their footsteps.

➤ **OASAS Changes:**

As those of you on the front lines are aware - the NYS Office for Alcoholism and Substance Abuse Services (OASAS) has been implementing a number of changes to their Client Data System (CDS) and required reporting. IMA is excited to be able to respond with a set of data changes to our OASAS module in support of these. The IMA OASAS changes include added support for:

1. the new data requirements for fields and categories
2. the corresponding new submission file format.

This added functionality will be available in v15.1 (more information on the version release in this Quarterly). It will include new IMA Desktop data screens and a reporting tool. Both existing and new OASAS module users will require configuration and training priced at \$1,500. All OASAS Provider should contact IMA for detail upgrade information. If your agency is affected by the OASAS changes and does not currently take advantage of the OASAS information in IMA, contact

us today to schedule a demonstration.

➤ **HIPAA:**

As you know by now, the 12/29/04 deadline is formally in effect but in some cases you will be able to get an extension until March 2005. You need to act now however to secure this extension before the end of the year.

IMA is proud of the excellent work our customers are doing. It has been noted that you as a group are 'ahead of the curve' and proceeding beautifully with the HIPAA Billing submissions and, most importantly, remittances.

While many of you are familiar with MC and MD submission, you may not know that there also exists an alternate universe of Private Insurance billing. Below is a list of the Private Insurance Companies to which IMA agencies are currently submitting HIPAA compliant electronic claims:

1. GHI
2. ValueOptions
3. HealthSource

If you do not see your payers on this list, get in touch with them today. If they can accept your claims in the HIPAA format, you can submit them with the IMA Desktop. The Private Insurance module for HIPAA submissions can be licensed for \$5,000.

As always, be in touch with us at IMA with any HIPAA needs that you may have. We look forward to hearing from you. Please see the Calendar of Events for HIPAA related calls this quarter.

➤ **IMA Message Boards:
An Update**

Membership Has Its Privileges!

Thanks to all of the new members for joining up! As you know – it couldn't be easier. The IMA Message Boards, located conveniently at www.imasys.com/boards require minimal personal information for membership. Simply provide a valid email address and you'll be posting online with us in virtually no time at all. Best of all, this information is provided only to IMA – we have eliminated all third party involvement.

Join as an agency or by yourself. Membership allows you access to all of the forums and topics. Visit today for the online listing of the IMA Wish List, the most up-to-date HIPAA information, as we have it, a constantly updated listing of all of the Conference Calls and Webinars IMA is hosting, a complete guide to all of the custom Desktop Modules and a General Discussion Forum designed to meet any of your missed needs – just to name a few!

Hop on today to see what we've made available for you.

Please contact Jessica, the Boards Administrator at boards@imasys.com with any questions or to schedule a Webinar tutorial to get the most out of the IMA Message Boards.

➤ **IMA SIG Status:**

Accomplishments to Date:

Two very interesting new products were developed by the SIG: the Screen Generator and the Form Generator.

The Screen Generator is a graphical layout tool that allows the user to select fields from the default

IMA and custom agency dB's and locate them in an IMA Desktop Client Data screen. The Screen generator has a preview pane where the screen layout can be viewed as it develops.

The Form Generator utilizes Adobe's PDF format and empowers an agency to be able to build custom forms for the IMA Desktop using existing documents and forms and filling client data from the IMA system to them. A graphical layout tool assists the user with the mapping of the IMA data fields to the PDF form fields.

This Screen Generator is also available to non-SIG members at a one time license fee of \$5,000. The Forms Generator can be ordered by non-members as Levels III & IV of the Forms Repository described in the feature article on page 1.

The next project will develop an off-line capability for doing progress notes and case management on any Laptop which could later be uploaded to the system.

If you are interested in joining, now is the ideal time when your annual maintenance contract is being renewed. If you act fast you can start participating in January!

➤ **V15**

This version has been out and has been deployed across almost the entire IMA customer base. Below are some of the newest features:



HCFA Printing changes include:

- a. Added support for Service Provider PIN and/or Agency Group # in Line 4 of Box 33.

- b. Added support for creating address CSV that can be used in formatting and printing labels for mailing.

UB-92 printing changes include:

- a. Added support for creating address CSV that can be used in formatting and printing labels for mailing

IMA Write Clinical Documentation Tool:

- a. The auto-generating tool now comes with the PNotes for your agency
- b. Join a webinar and schedule some training and configuration time to get started today!

➤ **V15.1**

The expected release date of the next iteration of our v15 will be in late January. The main feature of the v15.1 is the database changes to accommodate the new OASAS forms.

➤ **V15.2**

This is expected in late March and it will contain all changes that may be required to satisfy the HIPAA Security requirements going into effect on 4/21/05.

Q4 Calendar of Events

January

- 5th – Billing: HIPAA – TBA (1pm)
- 10th – UG Billing Sub Committee (1pm)
- 11th – Clinical: IMA Write (1pm)
- 13th – Forms Repository (1pm)
- 17th – Screen Generator (11am)
- 19th – SIG Meeting (tentative)
- 20th – General: Ad Hoc Report Layout Files (1pm)
- 24th – UG Clinical Sub Committee (1pm)
- 25th – Outpatient Treatment Reviews (1pm)
- 27th – Clinical – Configuring IMA Write for PNotes (1pm)

February

- 2nd – Billing HIPAA – TBA (1pm)
- 8th – Clinical: Writing PNotes: Basics (1pm)

February (cont.)

- 10th – Billing: Using Address CSV output for HCFA/UB92
- 15th – Screen Generator (11am)
- 17th – General: Blended CM (Billing & Svc Management) (1pm)
- 18th – Forms Repository (1pm)
- 22nd – Outpatient Treatment Review (1pm)
- 24th – Clinical: Configuring IMA Write for PNotes (1pm)

March

- 2nd – Billing: HIPAA: TBA (1pm)
- 8th – Clinical: IMA Write (1pm)
- 10th – Billing: MD Adjustments & Voids (1pm)
- 15th – Forms Repository (1pm)
- 17th – General: Ad hoc Report Queries (1pm)
- 22nd – Screen Generator (11am)
- 24th – Clinical: Configuring IMA Write for PNotes (1pm)
- 28th – Outpatient Treatment Review (1pm)

All General Conference Calls are an included benefit of your Monthly Service Agreements with IMA. HIPAA and HIPAA EMEVS Webinars are an included benefit of your HIPAA Transactions Testing & Support Contracts and/or your HIPAA EMEVS Testing & Support Contracts. The only charges for these calls will be for the fees associated with the call center and the website host. In cases where there is no Contract in effect, the elapsed time will also be billed.

**IMA would like to take this opportunity to wish our family of customers
a Happy, Healthy and Safe Holiday Season.**

See you all in the New Year!

As always, IMA looks forward to and appreciates the time our customers take to provide honest and helpful suggestions, criticisms and compliments. Keep it up, we're listening! feedback@imasys.com