The IMA Quarterly

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In This Issue:

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➢ IMA Clinical Expo

IMA will be hosting a **Clinical Expo** this fall providing your staff with an opportunity to quickly catch up and learn about all of the great new EHR (Electronic Health Record) features that are now available within the IMA Desktop.

During the last 18 months, IMA has invested an enormous amount of resources in the redevelopment of the IMA Desktop and evolving it into a state of the art EHR system. This new IMA EHR is fully backward compatible with all of your existing client data on the IMA system. We are now ready to share the happy result of all of this work with you.

The IMA EHR will include all of your intake and assessment documents, treatment plans, progress notes, progress summaries and OTR's. For each of these documents you may elect to transition it to (a) a full interactive electronic form with e-signatures, (b) utilize your own Word document but attach it to the IMA record for tracking andaccess purposes, or (c) keep the paper form and track it online. The system also incorporates extensive reporting, tickler and tracking tools for monitoring the completion of the required forms in a timely and efficient manner.

We invite all of your clinical managers and decision makers to come and participate in the IMA Clinical Expo on November 8, 2006 where IMA will:

- ❖ Survey all of the new online forms features;
- ❖ Demonstrate the new tools for building and maintaining online forms;
- ❖ Show how to set up unique monitoring and tracking requirements;
- ❖ Demonstrate the exciting new **Client Homepage**;
- ❖ Introduce the updated Wiley interfaces for Progress Notes and Treatment Plans;
- ❖ Review the new Managed Care online OTR (Outpatient Treatment Report) forms;
- ❖ Demonstrate the various integrated modules, including Case Management, ACT Teams and Medicaid Service Coordination.

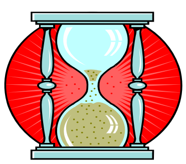
Your clinical staff who invest their time with IMA at the Expo can expect to gain an understanding of:

- ❖ IMA's integrated EHR;
- ❖ the requirements for and timeline to implement it;
- ❖ the associated costs and license fees;
- ❖ the immediate and long term benefits.

Summary:
What?
IMA Clinical Expo
Who should attend?
Clinical Managers/Decision Makers
Where?
Location TBA (greater NYC metro)
When?
November 8, 2006
How much?
Free of charge and lunch is on us!

Please send in your reservation early as space is limited. Be watching your email for the final details.

➢ Linux Conversion



We are almost there!

Thank you for your overwhelming response. Only a few installations remain that have not yet arranged for the update! If you are one of these remaining agencies, please contact IMA immediately to discuss your plans.

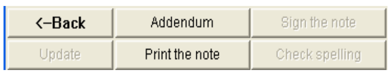
➢ IMA Visits

The program that we initiated this summer for IMA to visit with the executives and key IMA users in your agency is proceeding very well. We've already visited with 8 agencies to date and are making arrangements now for the next batch. Each of the visits so far has proven to be very rewarding both to the recipient agencies and to IMA. Please call us if you want to get in early on the next queue.

➢ New Premium Modules

Here are the latest additions to the v15.1 software release. Each is available for immediate release to your server as needed.

1. Addendum to signed Progress Notes



This represents a major new functionality for progress notes. An addendum can now be added to a progress note without requiring that a new separate note be written. The new Addendum feature provides a facility for adding text and changing the data associated with a signed note. The changes are then appended to the original note and automatically identified with the date and author of the change. The 10/11 Webinar will cover this new functionality. ***IMA will make available this premium option free of charge*** to any agency that arranges for training on the use of this feature.

2. Duplicate client record Merge Utility

Here is an easy solution to an old recurring client data management problem: the problem of duplicate client records for the same client. When the same client has programs and services recorded under more than one client number, it used to be almost impossible to get these records straightened out. This new utility will help you merge all of the records under a single record number. It will also correctly process any electronic remittance transactions that show up later for the client numbers that have been eliminated by the utility. If you currently face this problem, this new feature is for you.

3. Grant Tracking

A new customizable Grant Tracking module is now available that can be configured to collect and track the specific service and demographic statistics indicated by a contracted funding source. It will also produce the periodic reports for each case as needed. IMA has long excelled in the efficient handling of Fee for Service billing and accounting. Up to now, however, we had only limited capabilities for grant tracking, wherein specialized periodic service summary reports are required. Typically, the data had to be collected manually or from other reports, and then massaged in a spreadsheet as needed. Now much of this work can be automated. We recently completed one such module for a very complicated ATI (Alternatives to Incarceration) grant. If you could also use something of this nature, please let us know.

4. Clinic Appointment Reminders

This module will interface the IMA schedule to an auto-dialer system or call service. The dialer device or service will place phone calls to the clients scheduled for the next day to remind them of their appointment at your clinic. It can also be used in outreach to no shows after the failed appointment has passed.

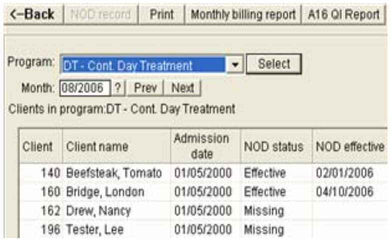
5. Integrated Modules

As we have received many accolades for the integrated Case Management module, we've developed other such modules for new applications as well as repackaging some existing IMA functions. The key feature in these modules is their integration wherein everything related to the function is visible and accessible from a single main option. Data collection, service reporting, documentation, tracking, reporting and billing are all together. The following is a brief description of the integrated modules currently available.

OMRDD Modules:

- ✓ *New* Medicaid Service Coordination: Monitor cases, record services, and accurately bill Medicaid for MSC services. This module will be featured in the 10/25 General Webinar.

- ✓ *New* DayHab: Provides tracking for NOD (Notice of Determination) status and dates and monitors attendance in order to accurately bill for services.



OMH Modules:

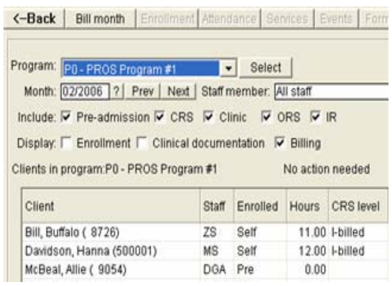
- ✓ Case Management: Module for Blended, Intensive and Supportive Case management programs with tools to manage caseload and team assignments, record and track services, write Progress Notes and create the appropriate monthly bills.

- ✓ Restorative Services: Manages caseload, records and tracks services and Progress Notes and creates the bills each month.

- ✓ *New* ACT Team: In addition to the Blended and traditional Case Management modules, we've added an ACT

Team module to monitor caseloads, record services, write Progress Notes, and create the corresponding bills each month.

- ✓ *New* PROS: Monitors caseloads, records and tracks services and attendance, tracks all biweekly and monthly requirements and creates the corresponding bills each month for the appropriate service level.



- ✓ *New* Article 28 services with multiple procedures per visit: Medical services including Podiatry and Physical Therapy often require multiple procedures and diagnoses for a single visit. This module adds the capability to capture, track and bill these multiple procedures and diagnoses correctly to 3rd party payers.

- ✓ Medicare Part A for Outpatient services: Facility to track services, Year to Date MC payments, MC Cap exceptions and to create the monthly bills.

➢ v16: New IMA Release

v16 is coming and will be available for distribution around November 1. Agency servers will be updated on a first come, first served basis. However, priority will be given to agencies with a high speed connection and who have connectivity to IMA's update server. This release contains major dB changes for billing and OASAS CDS as well as the usual feature upgrades and patches.

Major new features are:

1. NPI (National Provider Identifier)

NPI is a new HIPAA requirement that goes into effect in May 2007. Both Medicare and Medicaid are requiring NPI compliance for early 2007.

Medicare is requiring that all Medicare qualified providers obtain Personal NPI numbers to replace Staff Medicare Personal Billing PINS/UPINS.

Medicaid is requiring the same for all licensed providers. CSC has added an "Enter NPI" button on the eMedNY website to make it convenient for you to identify and link your agency and staff NPI data to your data at CSC.

2. OASAS CDS

NYS OASAS is making additional changes within the new online CDS batch reporting system that go into effect in January 2007. v16 will include the changes necessary to comply with these new requirements.

3. Clinical

We've added support for Microsoft InfoPath forms to be used within the IMA Forms Module. The InfoPath forms are a very powerful and easy to use tool that allows you to create or reproduce your own paper forms and convert them into interactive EHR forms. The InfoPath forms will allow you to:

- ✓ Pre-fill relevant client and program data from the IMA dB.
- ✓ Update IMA data with changes made to identified fields in the InfoPath form.

InfoPath forms will be able to be used for any clinical form usually associated with the IMA Forms Module, and now for Treatment Plans as well. A beta version is available for release in v15.1 to eligible agencies.

➢ Free Training from IMA

Please see the Q4 Calendar of Events for the dates of the free webinar training sessions offered by IMA. All agencies with a service contract are encouraged to attend. The only charges associated with these sessions are the third party charges from the call center and the web host.

If you have a training topic that you would like to see added to our general calendar, please email georgeanne@imasys.com.

Q4 2006:
Calendar of Events

****Each call will be 1:00 PM.**

October

11 - Progress Note Addendums
25 - New Desktop MSC Module

November

1 - Ad Hoc Reports: Report Layouts
8 - Clinical Expo
15 - Ad Hoc Reports: Queries
29 – Ticklers: Tracking documents/requirements

December

6 - Progress Notes w/Wiley
20 - Treatment Plans w/Wiley

IMA Office Closures

October 2	Yom Kippur
November 23	Thanksgiving
December 25	Christmas

All General Conference Calls are an included benefit of your Monthly Service Agreement with IMA. 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.

Webinar Abstracts

Progress Note Addendums
See the new Progress Note Addendums now available within View/Edit Progress Notes.

New Desktop MSC (MD Service Coordination Module)
See the new premium Desktop MSC module.

Managed Care: New tracking/monitoring Features
See the new premium Managed Care tracking tools for managing client services and authorizations from the schedule and for service delivered and for batch authorization entry and/or changes.

Ad hoc Reports: Layouts and Queries:
In this two part series, learn how to create ad hoc report layouts that include the specific data elements that you want to see either on paper or within CSV output. Then learn how to run dB queries for paper reports and CSV output using your own custom report layouts.

Ticklers: tracking documents/requirements
See the new and improved Desktop ticklers for integrated document and requirements tracking.

Wiley Progress Notes and Treatment Plans
See how using the Wiley data can make writing Progress Notes and Treatment Plans a breeze.

NOTE:
IMA will cancel any webinar without advance notice if there is not sufficient registration to support the fair and economic distribution of all connection charges. Please register early.