The IMA Quarterly

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In This Issue:

New release: Version 17	…1
EMR Subscription	…2
More v17 features	…3
Service Corner	…4
Calendar of Events	…5

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➢ v17, here it comes!

Our newest release, Version 17 represents another giant step for the IMA Desktop in its steady march and evolution into a State-of-the-Art Electronic Medical Record (EMR). The enhancements include new functional features, cosmetic and user interface refinements, and some new structural elements.

A few highlights of v17 are briefly outlined on this page. See the other pages of this newsletter for a list of more new features in v17 and a full length article on the latest development in our EMR. Keep in mind that all of the new features are available free of charge to EMR subscribers. For others, premium charges will apply.

Highlights…

E-Signatures:

Now that OMH and OMRDD have given their blessing for electronic signatures, IMA is ready and eager to implement it. You may choose from a number of approved methodologies for progress notes, treatment plans, and other documents within your IMA Forms library. Both staff and client signatures are supported. These may be implemented with or without an interface to a physical signature pad or biometric device.

Data security:

The tracking of changes to the database and the identification of every access to client data has now been greatly enhanced. The level of tracking desired may be customized at the agency level. Comprehensive reporting facilities were also added. The following is a brief outline of these tracking features.

Registration dB:
You may now specify which data fields in the client registration database, and/or the custom dB (CRMNAL) should automatically retain a full history of every change to the data value. The change history includes date, login id, and previous value of the data.

Services and billing dB:
All changes to the services and billing database are automatically tracked as to the date changed, and who made the change.

Access log:
Every access to a client related data screen is logged with the date, time, login ID of the user, and the application name used for the access. An archiving facility is also provided for removing the older logs from the online database.

Online Help:

A comprehensive and multifaceted online help and documentation system has now been incorporated into the IMA Desktop. It is always on, is context sensitive, and the text may be modified by each agency to incorporate your own specific instructions and rules into it. It consists of 4 distinct components as follows:

Application help:
For any application that is currently on screen, a help pop-up will offer 3 types of information: a user instruction page, an administrator page, and links to related topics.

Table help:
The current table help function has been expanded to include an open ended narrative memo for agency specific instructions and rules on the use of each specific code within the designated table.

Activity code help:
Expanded instructional help similar to the new Table help described above. This is where the billing and finance department can communicate your agency's unique billing rules directly online.

Client help:
Smarter client searches now filter out all programs except for the one specified.

Plan Ahead!

Version 17 will be available for release during the first quarter of 2008. Because v17 may require you to make changes in the way that you utilize and administer the IMA Desktop, we will offer a series of webinars to introduce you to the major new features, including the new standard HomePage and the new operator permissions set-up.

Participation in one of these webinars will be a prerequisite for the installation of v17 on your system.

Please see the Calendar of Events for the schedule of this series.

➢ EMR subscription

Remodel your chart room

Transform your chart room with IMA's Electronic Medical Record. It will help you better manage the clinical and administrative data for your agency.

Who's doing it?

FEGS in NYC is rolling out an EMR Subscription pilot in one of their Manhattan clinics. Clearview Center in Albany, has already converted all of their users to EMR subscribers. Also, two new organizations (Madison County Department of Mental Health, and Turning Point in Brooklyn) have recently joined the IMA family and are now implementing the full EMR on a subscription basis.

Remodel your chart room with a subscription to IMA's EMR.

Our EMR is designed to help you improve quality of care, reduce risk, cut costs, and increase revenues. This comprehensive, easy to use, and robust system allows you to maintain your client records more accurately and with less effort than with a paper chart. All of the elements of your physical chart can be available online. Additionally, all time sensitive compliance items will be tracked and automatically reported for each client, starting with their admission date.

Providers can conveniently view appointments, caseloads, to-do lists, and due dates on a single screen for their full caseload. Managers and administrators can monitor these same targets across providers, locations, and/or programs.

The Software

The EMR Subscription provides you with access to all of the clinical documentation software now available within the IMA Desktop. It includes the new v17 features announced here, new modules still in development, and many more that will be developed in the future. Contact IMA to receive a copy of the EMR Subscription product sheet that shows the list of all premium licensed products that are included. The following highlights the major attractions.

The subscription includes a user license for the basic functions for Client registration and data management, Service recording and billing, all associated reports, and the full online medical records package, including:

- the Client HomePage,
- The Forms Module and Library,
- Medication tracking,
- Lab Work and interface,
- Scanned documents and Images,
- Integrated modules for Case Management, ACT, OMR/DD, PROS and Restorative Services,
- Management and Q/A reporting such as the Forms monitor, the Client access log, Duplicate client tracking, Staff productivity and Client No Show tracking,
- E-reporting such as the monthly OASAS client data submission, OMH PCS, HUDS HMIS interface.

Keep in mind that the list of EMR options is constantly expanding as IMA develops new software modules to keep pace with the evolving needs of our organizations and the available technology.

How it works

The EMR subscription includes the server license for the number of subscriptions purchased. Therefore, if an agency has 30 licenses used by billing and administration and subscribes to a 15 user EMR, the system will be relicensed to make available up to 45 concurrent users.

Pricing information

The basic subscription rate is $100 per user per month. Do contact IMA, however, for a specific price quote for your agency. Various discounts are available and minimums apply. In particular, if the total number of active licenses in your agency is 15 or less, we have a very attractive pricing package for you.

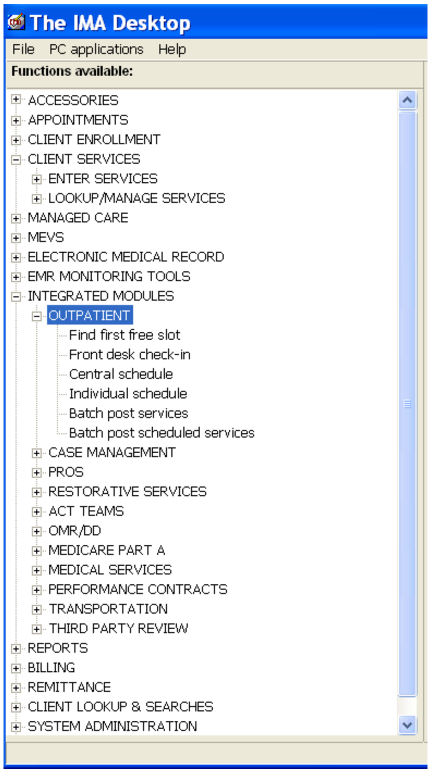
➢ More v17 features

User profiles:

Managing your IMA user profiles just got easier. You can now easily grant different levels of access to specific features within a single HomePage menu, to each user ID. This new streamlined structure for managing user profiles also interacts directly with the Linux O/S to add Linux users without requiring you to go to an additional screen to do so manually.

In conjunction with this design, we created a new comprehensive default **standard Windows menu.** You may be able to adopt this single menu for all of your users and greatly simplify your system administration overhead.

➢ More v17… (Continued)



IMA's new standard Windows Menu.

With the new standard HomePage and the new user profile maintenance capability, you will be able to better manage the access and security of your system. You will be able to more easily specify and control selective access to specific features with much less technical expertise to manage it.

Bulletin Board:

A new interactive Bulletin Board replaces the original static one. Administrators can now post messages that are either time limited or permanent, directed to everyone, to specific users, or to specific locations.

Billing:

Activity Code dB changes:
Added Medicaid SED and COPS only rate code fields. Added memo to include narrative instruction on how each activity code should be used.

Client billing header changes:
Added Y/N fields for Medicaid SED and Medicaid COPS only to indicate that the SED and COPS Only rate codes should be used instead of the regular Medicaid rate code.

Client bills:
Added support for the production of an invoice for a single service for self-pay clients, regardless of the number of visits within a specific day or week.

Staff licenses:
Added support for multiple licenses with effective and expiration dates. Automatic translation of license number to required Medicaid format.

Cash Receipt field:
A new field was added to indicate cash, check or credit card within cash receipts within Front desk check-in and client cash receipts modules.

Desktop bulk write-off options:
The original legacy bulk write-off options for client, third party and billing suspense invoices have been made available as Desktop utilities.

OMH Child and Family Plus:
Added support for this new and unique OMH billing and reporting program.

Private Insurance billing:
Added support for identifying the appropriate form version for UB (04 or 92) and HCFA (0805 or 1290) paper bills.

Paper bills from e-submissions
New option to produce paper bills from an electronic submission file for human analysis or other special purpose.

Billing batches:
Suppress M48 error when payer record is defined for program.

Medicaid Spend Down:
New Desktop screen to enter and manage the monthly Spend Down amounts for designated MD clients.

Medicaid COPS only and SED billing streamlined:
Medicaid COPS and SED billing has been streamlined to accomplish the billing for these special cases without a need for switch codes. This will drastically simplify your work flow and reporting.

Reports & Miscellaneous:

Cash Receipts Report:
The new cash receipt field for cash type is available for select and sort within the cash receipts report.

Wiley licenses:
The Wiley data licenses can now be assigned for each individual Wiley book to specific staff. This allows for a much more economical licensing arrangement. Previously if 20 staff had access to Wiley and 5 different books were used, 100 licenses were required. With the new licensing control mechanism the number can be reduced to as few as 20 licenses.

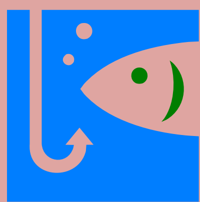
Client Registration:
All new user interface for client registration with updated default screens.

Client Collateral Contacts:
Added cell phone field to Client Collaterals database.

Calendar resource management:
Added support for managing defined agency resources per scheduled event including a warning when selected resource is in use.

➢ The Service Corner

As promised, IMA is pleased to continue this new section as a regular feature of the Quarterly. This quarter's theme is…



…'***Go fish***'.

The Service Beat

Gail Willis, IMA Service

To fish or be provided fish

Whenever you call us at the service desk with a problem we are happy to provide solutions in a timely manner, in other words "to provide you with the fish". Keep in mind however that we are also willing, able, and eager to "teach you how to fish" by sharing information about your system so that in the future you might be able to avoid issues and if encountered, solve some of them on your own. Additional benefits would be more self-sufficient and knowledgeable IMA users, increased staff productivity, and better service to your clients. Here are a few pointers on how you too can learn to "fish".

Internal IMA expert

Plan to develop at least one staff member as an IMA expert. In larger organizations it may be necessary to have multiple experts, one for billing and another for clinical and for administrative functions. The IMA expert should strive to become fully trained on all IMA functions in use at and critical to your organization. These experts will share their knowledge with your users and serve as the in-house trainer and clearinghouse of all information relating to IMA. Make sure that all of your IMA users know who this person is and channel all communication about IMA through them.

Since the IMA application is configured to meet each organization's use and preferences, "one-size-fits-all" training is not practical. The screens and features one organization uses are often very different than those same options at another organization. This makes it even more important that the local IMA expert master and become proficient in your agency's own unique environment. Eventually, your IMA expert may become the first line of support on your IMA system and may know your software even better than the IMA HelpDesk.

Custom Training Sessions

In some cases, individual staff members may require custom training on specific applications associated with their unique responsibilities. Contact IMA to arrange for this as needed. Also remember to cross-train multiple staff for these as well as all other critical IMA functions. This will insulate your agency from the risk of losing your IMA knowledge base when staff members transition in and out of your organization. A number of training options are available including, remote training via conference call (audio only), webinar (audio and video), training class environment at your agency site, or at IMA. Your choice in each case will depend on the number of attendees, the topics to be trained on, your budget, and your schedule.

General Webinar Participation

Take advantage of the free general webinars scheduled each quarter on various IMA application topics. On the last page of each quarterly newsletter is a calendar of events that includes the dates for upcoming general webinars. Make sure to register for webinars early as attendance may be limited. If you have ideas for general webinar topics, let us know and we'll be glad to consider your suggestions for future general webinars.

HelpDesk Tips

Art Erickson, IMA HelpDesk

Reading and responding to your electronic submission Response File: the 997 Functional Acknowledgements

Here are a few words this quarter about understanding HIPAA Functional Acknowledgments (FA 997 files) that you receive after you have sent an electronic claim file. To begin with, an electronic claim (837) is a file generated by the IMA system that places client claim data in the standard HIPAA format so that it can be sent to the appropriate payer.

The 837 file organizes all data in a predetermined structure and labels the various sections with designations called 'loops' and 'segments'. This makes it possible for claims to be automatically analyzed and remitted. If the data in a claim does not meet the basic structural requirements, it is returned with an error message referencing the specific problem and "loop" or "segment" where it was encountered.

Now for the details…

When you send this file to a payer or receiver, before it is admitted into the payer's computer system it is examined by a "gatekeeper" program that checks it for correct format and syntax, and to validate all data values in accordance with the published specification for the 837 claim. After analyzing the claim, the program creates an "FA 997" communication that you can retrieve and examine.

If your 837 claim was correct, an 'accept' FA 997 will be created. This is a confirmation that your claim was processed into the payer's computer system. An accepted FA 997 document does not mean that your claims will be paid; it just means that your claim got past the 'gatekeeper' and will be processed by the payer. On the other hand, if your 837 claim submission contained invalid data or syntax, an 'error' FA 997 will be created that will contain information to help you figure out what caused the error.

The FA 997 files are accessible on your system via the IMA Desktop 'HIPAA File Management' option. You can use the 'Print' button to create a hardcopy of the FA 997 report before you move it to the billing batch folder. This report will identify the billing batch, disk number of the submitted claim file and the date it was created. If you are looking at an accepted FA 997, the report will list all the transaction sets in the 837 claim and print "Accepted with no errors" after each transaction set.

Alternatively, if errors are present, you will see "Rejected" printed after the corresponding transaction set(s). The column headings on the IMA 997 report will help you see what segment, loop, position, error code, and bad data item is causing the error. Rejected transaction sets identify those claims that cannot be read or remitted by the payer. It is now your responsibility to address and resolve these errors so that you can resubmit the claims correctly.

The www.emedny.org website has some good information available to help diagnose FA 997 data errors. If you email helpdesk@imasys.com, I will be happy to send you this information.

Calendar of Events

Each webinar will be at 1:00 PM.

January

1 - IMA Closed: Happy New Year!
16 - General Webinar: Ad Hoc Queries

February

13 - General Webinar: v17
27 - General Webinar: v17

March

5 - General Webinar: v17
19 - General Webinar: New Client Registration

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

Also, please 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 via email to HelpDesk@imasys.com.

Abstracts:

Ad Hoc Queries: Learn how to save ad hoc queries and run them again later with slightly modified criterion to complete the reports you need on a regular basis.

Version 17: Learn what you need to know about the new IMA release that includes an all new operator permissioning protocol and an all new standard IMA Windows menu. Participation is a prerequisite for getting v17 installed in your test system.

Desktop Client Registration: Explore the Client Registration option with an all new user interface and default screens for v17.