



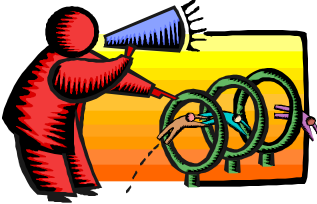
The IMA Quarterly

3rd Quarter 2003

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HIPAA Update



HIPAA Update

The Good News...

The IMA Desktop release that includes the new HIPAA billing engine, v14.3, is complete, fully tested and certified as HIPAA compliant. This new version will be ready for installation at your site beginning 8/1/03.

The three *HIPAA Transaction Training Seminars* in July were a great success. We had more than 90% participation and understand from participant feedback that the sessions were very informative. We were additionally able to incorporate the feedback we

received from the seminar participants into the new release.

All IMA installations have already been updated to v14.2 and are therefore ready for the v14.3 upgrades which are scheduled to start at the beginning of August.

The Work Ahead...

With October fast approaching, it is time for IMA to get each of our billing customers ready for the October HIPAA Transactions deadline for electronic payers. Your agency will need to make plans to update to the new version and start building the necessary databases to accomplish this conversion in time for testing with your electronic payers.

To assist you in this effort, IMA will dedicate the month of August to getting our customers updated to v14.3. **Priority assignment** in scheduling these v14.3 updates will be given those customers who have purchased IMA's HIPAA Testing and Support Package. All other customers will be scheduled for the v14.3 update on a **first come, first served basis**. In all cases flexibility by all parties will be required to maintain this aggressive update schedule to ensure that the update of all of our customer upgrades is completed within this very tight timeframe of one month.

We have also scheduled two series of two conference calls during the next month for training and actually setting up the databases required for the HIPAA billing submissions. The first of this series, however, is reserved for agencies that have signed up for our HIPAA Testing and Support Package. See the Calendar of Events section for the Call dates.



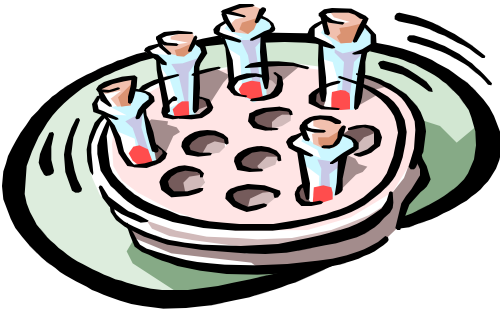
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Service Pack 3 for v14 (v14.3)

Service Pack 3 for v14 (v14.3) is the HIPAA billing version, scheduled for release on 8/1/2003. This new release contains all of the new definitions databases and associated screens required for HIPAA transactions, along with the HIPAA compliant billing engine. This release additionally includes patches to correct some problems in the previous version, as well as some enhancements since the last release.

IMA will update all customers to v14.3 during the month of August so that there will be sufficient time for HIPAA transactions set-up and testing prior to the October conversion deadline. Mark your calendars as we'll start scheduling installations immediately. Our update calendar will be very tight and aggressive. You'll need to pick a slot and commit to it as it is likely that a second chance will not be available until after the October deadline.



v14.3 Enhancements for HIPAA

1. New screens for defining HIPAA Receivers
2. New screens for defining HIPAA Payers
3. New screens for defining HIPAA Service Locations

4. New Desktop interface for X12 Remittance processing

v14.3 Enhancements

1. New license display and cleanup program for both character and Desktop licenses
2. Added Desktop Events
3. New Executive Desktop Menu with relevant data look-up and statistics

v14.3 Database Additions

1. new dB for identifying HIPAA Receivers
2. new dB for identifying HIPAA Payers
3. new dB for identifying HIPAA Service Locations

v14.3 Other Enhancements

1. Live interface with AIDS Institute for URS data reporting

An *IMA Companion to HIPAA Definitions* is included at the end of this IMA Quarterly to get you started with your HIPAA definitions. Also see the *Calendar of Events* for a schedule of HIPAA related conference calls.

Please also see our website (www.imasys.com) or inquire of us for updated Desktop Administrative and User Guides on the following modules and topics:

[Programs, Activities & Staff;](#)
[Access, Privacy & Security;](#)
[Client Registration;](#)
[Client Groups;](#)
[Schedule / Staff Calendar;](#)
[Front Desk.](#)

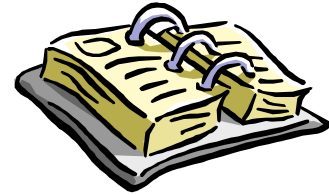


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Q3 Calendar of Events

- 7/1 HIPAA Transactions Seminar @IMA
- 7/4 Happy 4th of July / IMA Closed
- 7/8 HIPAA Transactions Seminar @IMA
- 7/15 HIPAA Transactions Web Seminar @IMA
- 7/24 CC on Life Cycle of an Invoice / Reading & Interpreting C21 SH
- 8/1 Release of v14.3
- 8/11 **Invitation Only CC on HIPAA Receivers**
- 8/13 **Invitation Only CC on HIPAA Payers & Service Locations**
- 8/14 CC on Adding Printers to UNIX & IMA
- 8/18 CC on HIPAA Receivers
- 8/20 CC on HIPAA Payers & Service Locations



- 8/28 CC on Set-Up for Desktop Central Schedule/Find 1st Free Slot
- 9/1 Happy Labor Day / IMA Closed
- 9/18 CC Reserved for any HIPAA Transactions/Billing issues

**CC = Conference Call

Continuing Education

The Summer Training Conference Call agenda for Q3 follows with a description of each topic offered.

8/11 & 18 w/HIPAA Receivers

8/11 is an Invitation Only Conference Call for those agencies who purchased IMA's Support & Testing Package to review the HIPAA Receivers set-up screens. 8/18 is an open Call to discuss same.

8/13 & 20 w/HIPAA Payers & Service Locations

8/13 is an Invitation Only Conference Call for those agencies who purchased IMA's Support & Testing Package to review the HIPAA Payers and Service Locations set-up screens. 8/20 is an open Call to discuss same.

8/14 w/Adding Printers to UNIX and w/in IMA

This is a topic and call repeated from last quarter. IMA will instruct you on all of the steps for adding printers to the IMA server and for making them available for printing within the IMA application.

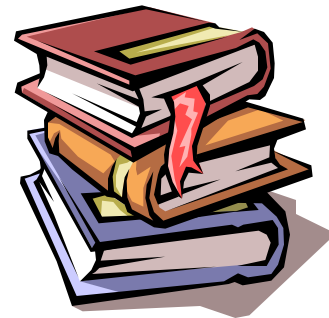
8/28 w/Central Calendar & Find 1st Free Slot Set-Up

IMA will guide you through all of the definitions required to set-up and administer the Desktop Central Calendar and Find First Free Slot features.

9/18 w/HIPAA Transactions Follow-Up

IMA will host this call to address any issues that develop from the implementation of the HIPAA transactions.

****Conference Calls are an included benefit to your monthly service agreements with IMA. The only charges for these calls will be for the fees associated with the call center and the website host.****



As always, feel free to email georgeanne@imasys.com with any requests for specific topics for the Q4 conference calls, seminars at IMA and with any feedback.



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IMA Companion for HIPAA Definitions

Roadmap and Companion to Definitions as required for HIPAA Billing Transactions

New databases

1. Receivers
2. Payers
3. Service locations
4. Payer to program links

Activity codes:

Revenue code: New field REQUIRED for institutional claims. This includes all Medicaid billing. Use the four digit version (three digit would have a leading zero). In 14.2 revenue code only had three characters. This has been expanded in 14.3

Client collaterals

Additional information needed for policyholders and referring providers

1. Name format: <LAST>, <FIRST>
2. Address: City, State, Zip, Line 3 of address, <City>, <ST> <ZIP>
3. Relationship to insured: Requires translation in RELATE table
4. Date of birth: required
5. SS#: Required for Medicare referring provider
6. Gender: required

Staff

1. A staff person must be linked to every program record and will be sent either as attending or rendering provider
2. Staff name is now sent in submission. For Medicare, Last name can no longer have commas with credentials and First name can not have middle initial. Credentials will therefore need to be moved to the new "credential" field.
3. Taxonomy codes: New identification for type of staff. Was originally required for all billing but is now optional. Individual payers might require it.
4. License numbers: As used in payer setup
5. Need SS#
6. Staff record corresponding to PSYCH record

Billing headers

Medicare as secondary payer: Need MCSEND code if Medicare is secondary.

Program definitions

A new field was added to indicate if Medicaid EMEVS authorization is required.



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Taxonomy code setup

New screen to define taxonomy codes

Table changes

1. ACTREV: Revenue codes (four digit)
2. CASGRP: CAS Adjustment group codes
3. CASRSN: CAS adjustment reason codes
4. CPT: Field to indicate if ordering physician UPIN required for bill
5. DENIAL: Link denial reason code to claim adjustment reason code for CAS record.
6. MCSEND: Types of Medicare Secondary Insurance. A few examples are
 - a. 12 Working age or spouse working age
 - b. 13 End stage renal disease
 - c. 14 No fault auto primary
 - d. 42 Secondary to VA
7. MUNICIPAL: City and state of client. Format is <City>, <2 CHAR STATE>
8. OVER90: New HIPAA OVER90 reason code mapping
 - a. 1 Proof of eligibility unknown or unavailable
 - b. 2 Litigation
 - c. 3 Authorized delays
 - d. 4 Delay in certifying provider:
 - e. 5 Delay in supplying billing form
 - f. 7 Third party processing delay
 - g. 8 Delay in eligibility determination
 - h. 9 Original claim rejected
 - i. 10 Administration delay in prior authorization
 - j. 11 Other
9. PSYCH: Psychiatrists need to now be set up as staff as well using the same id code. In some billing scenarios more information is needed about the PSYCH than what fits in the PSYCH table record.
10. RELATE: Translation to relationship code
 - a. 01 Spouse
 - b. 04 Grandparent
 - c. 05 Grandchild
 - d. 07 Nephew or Niece
 - e. 10 Foster child
 - f. 15 Ward
 - g. 17 Stepchild
 - h. 19 Child
 - i. 20 Employee
 - j. 21 Unknown
 - k. 22 Handicapped dependent
 - l. 23 Sponsored dependent
 - m. 24 Dependent of minor dependent
 - n. 29 Significant other
 - o. 32 Mother
 - p. 33 Father
 - q. 36 Emancipated minor
 - r. 43 Child where insured has no Financial Responsibility
 - s. 53 Life partner
 - t. 58 Other
11. RMTRMK: Remittance remark codes