



# The IMA Quarterly

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3rd Quarter 2004

## In This Issue:

The IMA UG. . . . .	1
An Upstate UG . . . . .	1
Version 15! . . . . .	2
The Development SIG . . . . .	2
The v15 Launch Party . . . . .	3
Clinical Doc Webinars. . . . .	3
v15 Webinars . . . . .	4
A Customer Highlight . . . . .	4
The IMA Message Boards . . . . .	5
New IMA Family Members . . . . .	5
Calendar of Events . . . . .	6

Editor: Jessica Ferrara

## ➤ The IMA Users Group

The May 2004 meeting of the IMA Users Group was a smash hit! We appreciate how many of you made the trip to Hicksville and hope it was as informative for you as it was for us. To recap; IMA demonstrated new features and enhancements to old features for a group of nearly 30 of our downstate users (and one upstate user!). The group then proceeded to move forward with the official formation of the UG and the election of your representatives.



Barry demonstrates enhancements to the UG on May 5<sup>th</sup> in Hicksville.

IMA congratulates and is delighted to work with the new representatives of the UG: Tim Seeberger (FEGS) as Chairperson, Leck Dzie (Project Renewal) as Co-Chairperson, Maryanne Forte (Central Nassau Guidance and Counseling Services) as Secretary and Lance Levitt (Sound View Throgs Neck) as Historian.



Tim Seeberger chairs the first UG Meeting, May 5, 2004 in Hicksville.

The UG decided that we would initially focus on two distinct areas of use. Two subcommittees were established to achieve these goals:

- The **Billing Committee** will be comprised of Tim Seeberger, Karl Rohrmeier (Institute for Community Living) and Lance Levitt. Their objective is to help agencies with HIPAA compliance.
- The **Clinical Committee** will be comprised of Venezia Michalsen (Women's Prison Association), Jerry Scott (FEGS) and Maryanne Forte. Their objective is to help agencies implement the IMA clinical modules.

Since time is a premium for all the users, it was decided that the UG would meet semi-annually on a face-to-face basis. The use of Webinars and conference calls on a monthly basis would keep everyone current without expending a large amount of out-of-office time. Good job, Users Group!



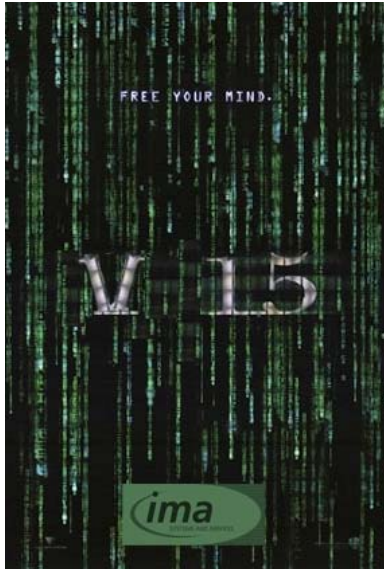
## ➤ On the Upstate Front:

The success of the May 5<sup>th</sup> Users Group has been undeniable. Thanks to the constant feedback of all of our attendees, IMA has decided to present a similar UG program to the IMA constituents working in northern and western New York State. This full day presentation will 'show off' IMA's soon-to-be released v15 features and give you the opportunity to meet other IMA users working upstate.

We are in the process of organizing this upstate UG for all of you 'North of the Border.' A late July/early August date is in the works and will be finalized in the coming weeks. Albany seems to be the meeting locale of choice. Please email Jessica ([Jessica@imasys.com](mailto:Jessica@imasys.com)) with any date preferences and location suggestions.

Watch your email for relevant updates or sign in to the **IMA Forum** for up-to-date news.

➤ **Version 15.0**



**IT IS HERE!**

That's right, ladies and gentlemen – Version 15 has arrived and is scheduled to be released on July 15, 2004. Here is a brief list of what it offers.

System wide enhancements:

- New Desktop client
  - Fully Resizable
  - Much faster than previous version
  - Column Re-Sorting capability after display
- File size & index integrity monitoring
- CSV output option included in many more reports
- Facility to re-load fonts at any printer prompt
- Print to PDF enhancement for remote printers
- Treatment plan & assessment memo files separated

Operations and Clinical:

- *New modules or Features:*
  - IMA-Write

- Desktop version of Lab and Bendiner interface
- Staff picture ID cards
- New Case Management module
- *Enhancements:*
  - Treatment plan table printing
  - Client data: New options for defaults & copying fields
  - Tokens/Transportation modules

Billing and Finance

- *New modules or Features:*
  - COPS/CSP reports & re-allocation
  - Handle Medicaid adjustments transactions
  - New void/adjustment reports
  - IPRT hourly monitoring report
  - HIPAA EMEVS (Authorization & eligibility)
  - Support for PI CPT modifiers based on staff
- *Enhancements:*
  - Effective & expiration dates for staff licenses
  - Remittance reports: New totals allowing for FULL reconciliation with check
  - Client cash receipts & integration in Desktop
  - Support up to 9 different COPS rates

➤ **The Development SIG:**

The Special Interest Group (SIG) was organized for the purpose of collaborative development of new software for the IMA Desktop. This joint venture between IMA and the SIG members was kicked off on May 12th with an initial set of 5 member agencies.

The SIG members will meet regularly to define and specify new features for the IMA Desktop and have them developed by IMA. At the first meeting, operating rules for the

SIG were adopted and the first new software module was defined and ordered.

The following is a brief outline of the operating principles for this SIG:

- The software developed by the SIG will be incorporated into the IMA Desktop as Premium modules with the price to be determined by IMA. SIG members will, however, be able to acquire all SIG produced software at no charge.
- The membership fees of the first 5 founding members established an initial development budget of \$60,000 which includes a \$30,000 matching contribution from IMA.
- It was agreed that the full budget must be spent during the next 12 months, that at least one meeting of the membership per month will take place either FTF or via a Webinar or Conference Call, and that a minimum of one deliverable per quarter will be planned.
- The first project of the SIG is to develop a user friendly Screen and Forms Generator. It shall maintain the functionality of the current IMA forms generator but enhance the interface and make it more user friendly so that an agency administrative user can take advantage of it without the expertise of IMA staff.

For additional information or to join the SIG, email Mike at [Mike@imasys.com](mailto:Mike@imasys.com).

➤ **IMA Clinical Doc Webinars:**

Tuesday, June 22, 2004 saw the sixth and final session of the IMA Clinical Documentation Webinar series. Georgeanne and Jessica hosted a well-attended session demonstrating the exciting new **IMA-Write** Clinical Documentation features debuting in v15.

**IMA-Write** represents a new functionality that allows a clinician to compose text for Assessments and Progress Notes with the help of a well stocked and structured library of relevant phrases. Appropriate phrase libraries are available from any one of the following three sources; the popular John Wiley & Sons Treatment Planners texts, a library of IMA-produced content drawn from the 'best practices' of our customers or, lastly, agency-specific subject matter that can easily be produced by your own clinical staff.

➤ **A second series starting in July:**

Due to popular demand as reflected in the following comments from Webinar attendees, we are repeating the series starting in July and expanding the list of topics to be covered.

*"These weekly sessions are so helpful to the groups that gather here. We love this medium!"*

*"I felt like this is an excellent time saving feature and an excellent way to train large*

*groups of people from the comfort of their own office."*

If you missed this round, know someone else that missed it, or if you'd like to revisit a Webinar another time, register for any of the bi-weekly Series II sessions starting on July 13<sup>th</sup> (all dates listed below). As we move through the weeks, our aim is to highlight the power of **IMA-Write** and our new clinical documentation features. We will use our database of test examples to answer your questions and illustrate how we can help make the important work at your agency easier for your people.

[Series II Webinars:](#)

- July 13<sup>th</sup> – 11am
- July 27<sup>th</sup> – 11am
- August 10<sup>th</sup> – 3pm
- August 24<sup>th</sup> – 11am
- September 7<sup>th</sup> – 3pm
- September 21<sup>st</sup> – 11am

➤ **New Savings:**

Additionally, IMA is happy to announce that, effective immediately, the reimbursable webinar expense rate has been lowered again. We have switched web hosting sites and will be passing the savings directly on to you. The new combined fee for Webinar hosting and phone charges is now only 35 cents per minute.

➤ **The v15 Launch Party**

To celebrate this milestone and to show off its new features and functionalities, we scheduled a v15 Release Party and Demo on June 30<sup>th</sup> at the IMA office. As your representatives, we invited the officers of the IMA UG and all members of the SIG to come see and celebrate with us.



*Lunch is served!*

In addition to the party, we have also asked the participants to have their agencies serve as Beta test sites for the new software.



*Members of UG leadership gather with IMA to celebrate the launch of V15 of the Desktop on June 30<sup>th</sup> in Edison.*

You too can participate! Read on and find out how your agency can take part in a presentation of all V15 has to offer.

### ➤ V15 Webinars

IMA will offer several brief Webinars presenting material similar to what the UG leadership saw at the June 30<sup>th</sup> V15 Launch Party.

Take advantage of this opportunity to see many of the new features and old-feature-enhancements as they go live on your IMA System. We will show you what is in store and answer your questions.

Sign up today!

#### [V15 Demo Webinars](#)

July 19<sup>th</sup> – 2pm

August 12<sup>th</sup> – 2pm

All Webinar series listed in this newsletter are offered free of charge. The phone and internet costs *will*, however, require reimbursement. A 45-minute session typically incurs a \$16 expense.

Email Jessica ([Jessica@imasys.com](mailto:Jessica@imasys.com)) for more details!

### ➤ A Customer Highlight:

#### **FEGS & the new Case Management Module**



#### Introduction:

FEGS has been a proud member of the IMA family since

1992. FEGS began their IMA experience with the IMA Workbench, what we now affectionately refer to as the *Legacy* or *character* system. In early 2001 FEGS was one of the first of IMA's customers to start transitioning to the Desktop. Today the IMA Desktop is featured on hundreds of FEGS PC's at most of their locations statewide.

#### The new CM module:

In 2003, FEGS approached our developers with the request that the process and billing logic set forth by OMH for Blended CM be integrated into the IMA system. The objective was to eliminate the extensive effort of double entry into two systems due to the requirement that the state-supplied PC software be used.

A new Case Management module was commissioned by FEGS to address this issue. It was also required to provide effective management and tracking facilities for their large and varied number of Case Management programs. The new OMH "Blended" and "Flexible" CM logic and procedures were to be fully integrated into this module, thus completely eliminating the need for the OMH supplied PC software.

Jack Carney and Mike Samel were responsible for the first round of the specifications and design for this module and it was then passed along to Barry Samel for development. The product went through a number of iterations. Each time it was

presented to the CM group they saw more of the potential in it for them, asked for more features, and back to re-development it went.

#### The Results:

This yearlong process culminated successfully in the June 10, 2004 presentation of the product at FEGS' 199 Jay Street location. The new program is now fully functional and FEGS expects to be able to process their July 2004 CM billing utilizing the new system, without doing any double entry of the data into the state-supplied PC software. In addition, the new IMA software includes a very elegant and efficient management tracking system for all of their CM programs at three management levels.

This final presentation of the CM module was exceptionally well received by FEGS clinical management staff. There was excitement in the air about the tremendous new capabilities of this software. They expect that this will not only save time but will also bring in more money by increasing the revenue from Medicaid.

#### What this means for you:

This new Desktop module is now available to all IMA customers for a \$10,000.00 license fee. Those agencies that have already licensed the Case Management billing component should be happy to learn that a \$2,500.00 credit will be issued toward the purchase of this exciting new tool, bringing the upgrade license fee down to \$7,500.00.

### ➤ Welcome to the IMA Family!

IMA would like to welcome two new customers to our family of IMA System users.

- Alcohol and Drug Dependency Services, Inc. (ADDs) in Buffalo.

Services include:

- Inpatient & Outpatient Alcoholism Treatment Facilities
- Adult & Adolescent Programs
- Detoxification Programs
- Inpatient Rehabilitation Programs
- Halfway Houses

- Health Industry Resources & Enterprises (H.I.R.E.) in Manhattan and the Bronx.

Services include:

- HIV/AIDS Housing & Services
- Homeless Services
- Outpatient Mental Health Services
- Case Management
- ACT Team
- Restorative Services

We are looking forward to many years together.

### ➤ Message board on the IMA Website

IMA is in the process of fine-tuning a customizable online forum for all of our users. For those of you that have never visited a message board, here is your opportunity to see what all the buzz has been about!

You will be able to sign in to register your very own screen name, set up your profile and start the communication with fellow IMA users and IMA!

The IMA Forums will include discussion groups and data on the IMA Wish List, Projects currently under development, IMA Bugs & Fixes and the IMA UG Directors list and contact information.

Check out the new **"Forums"** link on the official IMA website, [www.imasys.com](http://www.imasys.com).

### ➤ A Call for Submissions!



*The new IMA uniform.*

Do you have something you'd like to share with the IMA readership? Are you interested in seeing your agency up here?

Let us know! The IMA Quarterly is now accepting submissions for features in upcoming issues. Or, if there are no writers in the house, Jessica will interview and profile your team before presenting your accomplishments to the IMA Community!

[Jessica@imasys.com](mailto:Jessica@imasys.com)

### ➤ v14.4 update status

"This is a great day." said IMA's Tom Schultz as he updated our last *updatable* customers to v14.4. After this, all of IMA will be ready to move forward into the v15 future!

Watch for those CD's and feel free to contact us with scheduling concerns or v15 questions.

## Q3 Calendar of Events

### July

**7/7** – CC General: Find First Free Slot  
**7/13** – IMA Clinical Doc Webinar 11am  
**7/19** – V15 Webinar  
**7/21** – CC General: Central Schedule  
**7/27** - IMA Clinical Doc Webinar 11am

### August

**8/2** – V15 Webinar  
**8/10** – IMA Clinical Doc Webinar 3pm  
**8/11** - CC General: Ad Hoc Layout Files  
**8/19** – CC HIPAA: EMEVS Eligibility & Authorizations  
**8/24** - IMA Clinical Doc Webinar 11am  
**8/25** – CC General: Ad Hoc Basic Queries

### September

**9/02** - CC HIPAA: EMEVS Eligibility & Authorizations  
**9/7** - IMA Clinical Doc Webinar 3pm  
**9/15** – CC General: Service Records  
**9/21** - IMA Clinical Doc Webinar 11am  
**9/23** - CC HIPAA: EMEVS Eligibility & Authorizations  
**9/29** – CC General: Client Cash Receipts

### IMA Office Closures:

#### July

**7/2** - Independence Day

#### September

**9/6** - Labor Day  
**9/16-17** - Rosh Hashanah  
**9/30** - Succoth

The IMA Clinical Documentation Webinars are offered free of charge. All Conference Calls are an included benefit of 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. In cases where there is no Contract in effect, the elapsed time will also be billed

### Conference Call Session Abstracts

#### **7/7 – Find First Free Slot**

Workflow review of this function for client intake and medication appointments with selection criteria and direct access to schedule.

#### **7/21 – Central Schedule**

Workflow review to define and group agency staff/time resources that can be available for look-up and edit with selection criteria.

#### **8/11 – Ad Hoc Layout Files**

Workflow review to define agency specific report layout files to be used across the agency for ad hoc queries of dB.

#### **8/19 – HIPAA EMEVS Eligibility & Authorizations**

Workflow review & demo of set up & use of new HIPAA EMEVS Desktop software for those w/the licensed module.

#### **8/25 – Ad Hoc Basic Queries**

Workflow review to use agency defined report layouts for constructing dB queries for paper reports and CSV output.

#### **9/2 – HIPAA EMEVS Eligibility & Authorizations**

Workflow review & demo of set up & use of new HIPAA EMEVS Desktop software for those w/the licensed module.

#### **9/15 – Service Records**

Workflow review to manage the client billing records/invoices with Desktop with Billing Functions.

#### **9/23 – HIPAA EMEVS Eligibility & Authorizations**

Workflow review & demo of set up & use of new HIPAA EMEVS Desktop software for those w/the licensed module.

#### **9/29 – Client Cash Receipts**

Workflow review to manage client cash receipts and write-offs

### IMA Clinical Documentation Webinar – Series II

**7/13 – 9/21**

This biweekly series features an encore of the first Webinars demonstrating the new IMA-Write in Assessments and Progress Notes. It will spotlight the new functionality available with v15.

### V15 Webinars

**7/19 & 8/12**

A brief introduction to the features that will be rolled out with Version 15.