



# The IMA Quarterly

July 9, 2007

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## ➤ Electronic Health Record

The new IMA Electronic Health Record (EHR) offers a flexible licensing alternative that gives your agency the benefit of expensive software modules without premium pricing. The monthly fee is flexible and can be structured to account for the size of your agency and the number of clinical licenses needed.

The EHR monthly license fee entitles the Agency to all of the clinical software modules within the IMA Desktop. Agencies can pick and choose among all of the IMA clinical functions and options including:

- Progress Notes.
- Treatment Plans.
- The Forms Module with ticklers, attachments and online forms.
- Medication tracking and prescriptions.
- Lab work.
- Client Assessed Needs.
- Alerts.
- Events.
- The Client HomePage.
- Nth visit review Progress notes.
- No-Show Monitoring.
- Correspondence module.
- Clinical record access log.

The IMA EHR license also includes the integrated modules for Case Management, MSC, Restorative Services, ACT, and DayHab.

## Client HomePage

A new feature developed specifically for the EHR is the all new Client HomePage. This amazing new screen accumulates all of the online clinical data and related information for any client, into one centralized location for ease of access and review. The clinician can then choose a tab with its related topic to further review and/or modify the record. Progress notes, treatments plans and other clinical documents can all be accessed, changed or added new right here.

## Clinical Content

Clinical content is now also being provided as part of the IMA EHR in the form of a set of standardized online clinical assessment forms for

various program types. Some of the forms included are, Intake, Psychosocial, Mental Status Exam, PHQ-9 Depression Inventory, Psychiatric Evaluation, and Discharge Summary.

Clinical content is also available within the IMA Treatment Plan module and within Progress notes in the form of the Wiley data sets. Wiley's treatment planner data and progress note planner data can be licensed and used within both treatment plans and progress notes or either. Current titles immediately available are:

- Adult, Adolescent, Child
- SPMI,
- Family, Couples,
- Addiction.

Client HomePage

Clinical Content – Wiley Progress Notes

## ➤ v16: Progress Report

More than 30 agencies already have v16 fully deployed in their production systems. Even though this upgrade includes a number of significant new features and innovations, the update has generally been a very smooth process.

Highlights of the v16 release are:

- Support for the mandatory NPI requirements in electronic and paper billing,
- Support for the new OASAS data report formats,
- Introduction of the new IMA Electronic Health Record (EHR).

Please follow up with our HelpDesk immediately to schedule your production upgrade if you have not already done so. v15.1 is now obsolete and none of the current software fixes or upgrades are backwards compatible.



## ➤ v16: Plus...

IMA has further enhanced v16 during the past few months beyond the original new release.

The following is a list of some of these new features within the basic Desktop, as well as some new premium, optional modules that are included within the EHR.

### Billing: NPI

There have been many software changes to support the submission of NPI data within electronic claims (837 and HCFA image/electronic CMS-1500) and on paper claims (HCFA 1500 08/05 and UB-04).



Because these changes affect your billing system, we've asked that you contact IMA to schedule this software upgrade. If you have not done so already, please email [HelpDesk@imasys.com](mailto:HelpDesk@imasys.com) to schedule this critical update ASAP.

The changes for NPI are extensive and complex and vary by your specific configuration. If you need assistance from IMA in navigating and managing this transition, IMA is offering an NPI consulting package for \$1500. Email [Mike@imasys.com](mailto:Mike@imasys.com) if you would like to purchase this additional service. This consulting package includes support for the entire NPI conversion and compliance process, from assisting you in getting all of the required definitions updated to helping you test with your payers and troubleshooting any related errors.

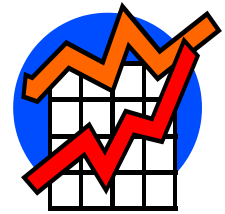
### Inactive Claim Adjustment Reason Codes

IMA created new tools within Billing Batches that will allow you to identify and correct any inactive Claim Adjustment reason codes on client invoices before submission to Medicaid.

The CASRSN table was updated with the latest code set where the inactive codes are now designated as such. So, when a claim contains an inactive CASRSN, you'll see it marked with the new exclude M97 billing error until you can correct it.

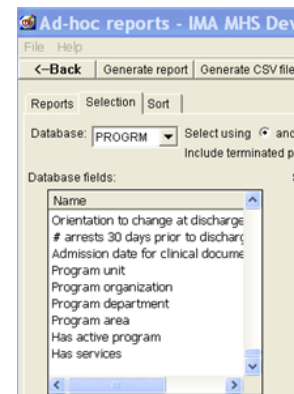
### Reports: Ad hoc enhancement:

Many of you often need to extract statistics of the total number of unique clients served during a selected time period. Until now the reports available made extracting this information difficult and potentially labor intensive. We have now added two new selection criterion within ad hoc reports that allow you to get to this information in a very direct and simple way.



The two new selection options in the PROGRAM selection list are:

1. **Has active program:** A client will be counted as long as the client has an open program record in the date range specified.
2. **Has services:** It will count the client if they have any services in the date range specified, excluding no shows.

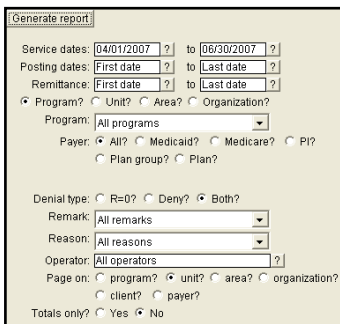


These selections work in conjunction with a program selection allowing you to obtain clients active in the entire agency or within specific programs and for the enrollment and/or services dates designated.

See the Calendar of Events for the date of the General Webinar in August on using this ad hoc tool. Do not forget to register!

**Denial report**

The new Desktop Denial Report has been further enhanced to add selection criteria based on the data embedded in the Remittance batches. These include: posting date range and remittance date range, payer, remittance remark, claim adjustment reason, and operator who entered/posted the remittance batch. These data elements are also included for each claim on the detail report.



While this report upgrade is free, IMA is requiring that you participate in a webinar training session to be eligible for its installation.

**IMA Calendar:**

**Location**

New feature to view or print the schedule for a location (SCHLOC) for the day or date range identified in addition to the usual selections for staff, client and group.




**Client Help**

New features within Client Help within the staff calendar and elsewhere to see my caseload as Psychiatrist or Case Manager and an option to include or exclude clients in terminated programs.



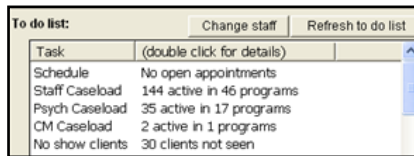
**To Do List:**  
**New Caseload options**

New feature to add the caseload associated with the

client's Program enrollment's Psychiatrist or Case Manager to the To Do List.

**No Show option**

New feature to count and list the number of clients on each staff's caseload who have not been seen and how long since the last visit.



Task	(double click for details)
Schedule	No open appointments
Staff Caseload	144 active in 46 programs
Psych Caseload	35 active in 17 programs
CM Caseload	2 active in 1 programs
No show clients	30 clients not seen

**Customizing the To Do List**

The task titles and their appearance on the To Do List are now completely configurable for each Windows Menu.

**PROS Update**

The PROS early adopters have finally been able to start serving clients and utilize the new IMA PROS software. Occupations, Inc. and F.E.G.S. have gone live with new Medicaid PROS programs and the new IMA PROS module.

Both agencies are enrolling clients, collecting daily attendance and service data for medically necessary services, and have already submitted their first monthly billing cycles.

**IMA News**

The IMA Service Team was finally restored to its full and renewed strength during the second quarter. Georgeanne is back on a part time basis and two new staff members have brought in additional vigor, enthusiasm and expertise to help serve the IMA community. They are eager to get to know you and your Agency and to continue to provide you the excellent IMA service to which you have come to know and expect.

Here's a little introduction to help you get to know each of them.

**Art Erickson** has been with IMA for only six months, but he has been involved with software applications support and development for over six years. His prior experience has been with software for the manufacturing, distribution, and warehousing of clothing and giftware, including Electronic Data Interchange (EDI) with major retail store chains across the country. Prior to working in software development, he was a Certified Quality Engineer and Certified Quality Auditor employed by several major aerospace electronics companies.



Art and his wife Carol are both native New Yorkers, growing up on Staten Island, but have lived in New Jersey for many years. He graduated from Brooklyn Technical High School in New York and attended Rutgers University in New Jersey. After hours, when he is not in the office, helping you out over

the phone, he is likely to be found at rehearsals and concerts for several choral groups that he sings with, working in his shop, or producing a church newsletter on his PC at home.

**Gail Willis** is an 18 year veteran of the I.T. industry, having worked for Allstate Insurance, the Nashville Area Chamber of Commerce and Pfizer. She has worked in roles ranging from network administration to I.T. Director in various fields.

Gail is a native of New Jersey who attended Tennessee State University and who was fortunate to

be transferred back to Tennessee while with Allstate Insurance.



She's now back in New Jersey after having finalized her 2<sup>nd</sup> adoption. She is passionate about charitable work in the fields of mental health,

substance abuse and homelessness and is pleased that she has this opportunity to join her professional technical experience with her personal mission of helping people in need of the services IMA customers provide.

Gail is also a NJ state notary certified in loan signings and the technical director of the local chapter of the FBI's Homeland Security InfraGard. Gail likes to read and to listen to live jazz in what free time she can muster.

## Q3 2007: Calendar of Events

*\*\*Each general webinar will be at 1:00 PM.*

### July

- 4 - IMA Closed: Happy Independence Day!
- 25 - General Webinar: Denial Analysis

### August

- 1 - General Webinar: Cash Reporting
- 15 - General Webinar: New Ad hoc tool: Unique

### September

- 3 - IMA Closed: Labor Day
- 13-15 - IMA Closed: Rosh Hashana
- 19 - General Webinar: Impact of NPI on billing
- 27-29 - IMA Closed: Sukkot



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.

## Webinar Abstracts

**Cash Reporting:** Learn how to report on your cash receipt and cash application data.

**Denial Analysis:** Explore the new Denial Report and learn how to examine and manage your denials more efficiently and to maximize reimbursement.

**Ad Hoc Query: New tool for unique:** Learn how to use the new ad hoc tool for identifying unique clients admitted or unique clients served during any period of time.

**Impact of NPI:** NPI has had a larger impact on paper submissions than on electronic submissions so far. See the new way to set-up and manage your paper forms of submission and how to create custom templates by payer using the Desktop.