



The IMA Quarterly

IMA Systems and Services

4th Quarter 2003

In This Issue

News 1
HIPAA Transactions,
PCS 2003 and
Other Items

v14.3 2
New Features,
Enhancements and
New Products

Continuing Education . . . 3
Discussion of Impact
and Future Plans,
Feedback from
the HIPAA Front

Calendar of Events 4
Conference Call Schedule
and Abstracts



HIPAA Update Contingency Plans

Both Medicare and NYS DOH for NYS Medicaid have announced that they have a Contingency Plan in place that will allow each of them to accept claims in their own original proprietary formats after the October 16, 2003 deadline.

You should check with your contacts at each to determine if you are eligible under these Contingency Plans.

However, do not allow this extension to derail your testing efforts. While Medicaid cannot yet accept X12 claims, NYS DOH is still requiring you to initiate testing at www.hipaadesk.com.

Medicare has X12 claims and remittance processing in their production systems and is ready to accept your X12 transactions as soon as you complete testing.



OMH Patient Characteristics Survey (PCS)

2003 Survey

IMA is preparing the changes necessary to support the survey for the 2003 OMH Patient Characteristics Survey. The Survey period is defined as 10/27/03 through 11/2/03 with the data due to the State by 11/24/03. There will be a new Desktop program with data entry screens, error reporting and submission file creation.

Please see the New Products section for further details. We will additionally host a series of Conference Calls/Web Seminars to help you get this underway.

You're Invited...



IMA is proud to announce that we have completed the remodeling of our Edison Headquarters from top to bottom. We would love for you to drop by and see our new offices.

Those of you who participated in August's Conference Calls (or visited during that time) will appreciate that we chose a hammer to characterize this exciting announcement. Please come see IMA's newly remodeled space.



New Additional Features for v14.3

v14.3

Billing

- Desktop Billing Batches now includes a new utility for reprinting reports, getting submission files ready for FTP, and marking them as submitted.
- A new Desktop Service Record Lookup screen includes all of the various Display, Change and Processing functions available in the C21 character option.
- A new Desktop option for manually entering Billing Remittances has been added for recording both single payments and/or payments within batches. This new option supports all of the internal IMA data requirements as well as the new HIPAA data.
- Restorative Services Billing was changed to handle OMH's elimination of billing for the \$1 services. This will be activated with the new billing program with an agency-specified cut-off date to support the old format.

Window Size of the IMA Desktop

We have finally come up with a way to increase the screen size of the IMA Desktop windows. The latest copy of v14.3 already includes a larger screen format for Progress Notes. One obvious advantage of the larger screen here is the fact that the full width of a note can be viewed on the screen without the use of the scrollbar. The larger screens will similarly be introduced into other programs as the system further evolves during the next 12 months.

License Maintenance

- New and improved facilities have been added in both character and Desktop versions to observe and manage agency user licenses with:
- an expanded display of users logged in and what program they are running;
 - ability to log the selected user(s) off of the system, send them messages, or send them a terminal timeout;
 - and a display of current, real time system load.

New Products

Transportation billing module:

- Maintains and tracks transportation routes.
- Tracks all client transportation services provided.
- Provides comprehensive reports on the collected data.
- Includes Medicaid billing and applicable self-pay billing.
- Tracks Medicaid prior approvals.

PCS 2003

A new PCS module will be available for the 2003 census requirement. It will include:

- All of the data changes specified in the 2003 notice;
- A GUI/Desktop data entry screen;
- A GUI/Desktop data entry and error report;
- A GUI/Desktop facility to generate the submission file;
- Two phone/internet seminars to review workflow and address any necessary data translations from your table codes to the required OMH codes.

Executive HomePage:

- Summarized lookups of client and staff data.
- Real-time census and activity statistics at program and staff levels.
- Summarized Revenue, A/R, and other financial statistics.
- Clinic productivity and incentives data at all levels.

In Development

- Referral Tracking Module & reporting tools
- Case Management Module
- New PROS MD Billing Module
- X12 (HIPAA) batch EMEVS option



Continuing Education

We at IMA appreciate your recognition that something special is happening here. In the past two quarters IMA has achieved a major milestone in delivering timely, relevant and cost-effective training to all of our valued customers.

The HIPAA compliance calendar has challenged all of us to plan and prioritize our time more efficiently. As a result of needing to support three dozen simultaneous HIPAA implementations, we initiated a series of training Conference Calls with corresponding Web Seminars as we launched the new version supporting these changes.

This series of online sessions has addressed the changing requirements in electronic billing related to HIPAA and the resultant changes in billing set-up within your IMA system.



These sessions have been tremendously effective in getting information to you, giving you the opportunity to express feedback, and providing you with a means to discuss the process with other agencies with similar experiences.

As you can see from the extensive Calendar of Events on the next page, we are continuing to offer even more online seminars during this quarter. As we develop the call agendas and curriculum, we will solicit your input and feedback with regard to topics of interest and areas of need. As always, we will strive to provide enough variety to spur the interest of and satisfy the needs of our customers in different sectors. We will need to hear from you, though, to accomplish this goal. We look forward to hearing from you on how we can continue to improve service delivery as we strive to meet your IMA training and information needs.

Feedback from the HIPAA Front

“You have no idea how helpful [these IMA seminars] are to me!”—*Debi Bucciero, Insight House*

“I would [like to] express thanks for the scheduled conference calls that have been helpful... Although the process has been taxing, the results have been rewarding.”—*Tim Seeberger, FECS*

“IMA is doing a fantastic job in HIPAA set up and preparation. The staff of IMA have guided us through every step of this complicated ever changing maze of HIPAA set up, testing and eventually billing. I have every confidence that with the assistance of IMA, my center will be completely HIPAA compliant in terms of all billing issues well in advance of the February 2004 deadline.”—*Lance Levitt, Soundview Throgsneck*

“I left the training being a bit overwhelmed, but quite comfortable in the knowledge that Central will be able to conduct HIPAA-compliant transmissions successfully because you, as our vendor, are very prepared. That fact will make my own job much easier. So, for that, I thank you on behalf of Central Nassau, Barbara Bartell and myself.”—*Maryanne Forte, Central Nassau Guidance Center*

Successful HIPAA Testers to Date

- Central Nassau Guidance Center
- Delaware County Department of Mental Health
- FECS
- International Center for Disabilities, Inc.
- Long Island Counseling Center
- Occupations, Inc.
- Peninsula Counseling Center
- Realization Center
- Soundview Throgsneck



Q4 Calendar of Events

October

- 10/6** Yom Kippur / IMA Closed
- 10/7** CC: HIPAA Receivers, Payers, Locations
- 10/9** CC: HIPAA Tables, Staff, Activities, Collaterals
- 10/23** CC: HIPAA Receivers, Payers, Locations
- 10/29** Invitation Only CC on HIPAA PI
- 10/24** CC: Getting ready for PCS
- 10/30** CC: HIPAA Testing

* CC = Conference Call. Each call will take place at 11:00 AM

November and December

- 11/6** CC: HIPAA Adjustment (CAS) Records
- 11/13** CC: Adding Printers to UNIX & IMA
- 11/18** CC: Submitting PCS data electronically
- 11/20** CC: HIPAA Topic TBA
- 11/27** Happy Thanksgiving / IMA Closed
- 12/11** CC: Exploring the new Desktop Client Service Lookup
- 12/18** CC: HIPAA Topic TBA
- 12/25** Happy Holidays / IMA Closed

CC Session Abstracts

The Training Conference Call agenda for Q4 follows with a description of each topic offered.

10/7 and 10/23 w/HIPAA Receivers, Payers and Locations

Each Call will cover the v14.3 set-up for HIPAA Receivers, Payers and Service Locations for MD and MC HIPAA Billing.

10/9 w/HIPAA Tables, Staff, Activity and Collateral changes

This Call will address the changes in Tables, Activity definitions, Staff definitions and Collaterals as necessary in support of HIPAA billing.

10/29 w/HIPAA billing for PI

This is an Invitation Only Conference Call for agencies who purchased the HIPAA Private Insurance Module. In this call, IMA will review the set-up and testing process for HIPAA billing w/PI.

10/30 w/HIPAA Testing for HIPAA Receivers

In this call, IMA will review the testing process for both MC & MD Receivers.

10/24 & 11/18 w/PCS 2003

In these calls, IMA will familiarize you with the new PCS data entry screens, data error report, any necessary table conversions and generating the submission file.

11/6 w/HIPAA Adjustment (CAS) Records

IMA will review the process of recording the adjustment groups and reasons for non-HIPAA remitted (paper) claims in preparation for submission to subsequent HIPAA payers

11/13 w/Adding Printers to UNIX and w/in IMA

IMA will provide instruction on the steps for adding printers to the IMA server and for making them available for printing within the IMA application.

11/20 & 12/18 w/HIPAA Topic TBA

IMA will host these calls to address any issues that come up as you are setting up HIPAA definitions and go through the testing process with each HIPAA payer. We'll solicit your feedback on needs and knowledge gaps in preparing the agenda for each.

12/11 w/new Desktop Client Service Look-Up

IMA will introduce you to the new Desktop Client Service Record Lookup and Billing Record Maintenance Option.

The HIPAA Conference Calls are an included benefit of your HIPAA Testing & Support Contract. All other 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. In cases where there is no Contract in effect, the elapsed time will also be billed.