



The IMA Quarterly

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Editor: D. Georgetanne Biancarosa

➤ IMA Forms Library

As part of the Electronic Health Record (EHR), IMA is assembling a comprehensive library of paper clinical forms for Mental Health, Chemical Dependency and Criminal Justice organization types and converting them to electronic format. This library will be available for your agency to implement as is or as a starting point for developing your own forms. The library is available free of charge to subscribers of the IMA EHR. It could also be licensed separately in conjunction with the Forms module.

This library is organized by service category and includes the usual relevant topics for each organization type. From this library, your agency will be able to select and choose the specific documents and/or forms to be incorporated into the standard clinical folder for each of your programs. Additionally, you will be able to customize any of these forms to your specific requirements, thereby creating your own unique set of IMA forms for each of your programs.

This library includes a combination of both online IMA screens with PDF print outs and InfoPath forms. This way, there is no requirement that you purchase any additional third party software (Microsoft InfoPath) for each PC unless you

elect to do so. In the future we may add other technologies as and when they evolve.

The following is a sample list of the form titles that will be included in this library:

- ✓ Face Sheet
- ✓ Intake
- ✓ Psychosocial
- ✓ Health Screening
- ✓ Discharge Summary
- ✓ Comprehensive Treatment Plan and Review
- ✓ Client Consent, Release and Authorization forms

Each of the forms in the IMA library includes a monitoring component, in addition to the basic functionalities of data collection, hard copy output, and reporting. The monitor will be controlled by tracking parameters and target responsible parties that you will define for each form. This tracking information is reported by the system in real time via various alerts and administrative monitoring reports as shown below in one example.

Client	Client name	Admission date	Description	Date due	Status	Form type	Responsibility
1967	Tiger, Tony The	09/10/2007	Intake and Psychosocial	10/10/2007	Soon	Online form	DGB
1967	Tiger, Tony The	09/10/2007	Admission Note		OK	Online form	DGB
1967	Tiger, Tony The	09/10/2007	Health Hx Questionnaire	10/10/2007	Soon	Infopath	DGB
1967	Tiger, Tony The	09/10/2007	Consents and Release Packet	09/24/2007	Soon	Tickler	DGB
1967	Tiger, Tony The	09/10/2007	Consent for Medication		OK	Tickler	DGB
8993	Davidson, Harley	09/02/2007	Intake and Psychosocial	10/02/2007	Soon	Online form	DGB
8993	Davidson, Harley	09/02/2007	Admission Note	09/16/2007	Soon	Online form	DGB
8993	Davidson, Harley	09/02/2007	Health Hx Questionnaire	10/02/2007	Soon	Infopath	DGB
8993	Davidson, Harley	09/02/2007	Consents and Release Packet		OK	Tickler	DGB
9002	McBeal, Allison	05/15/2006	Intake and Psychosocial		OK	Online form	DGB
9002	McBeal, Allison	05/15/2006	Admission Note		OK	Online form	DGB
9002	McBeal, Allison	05/15/2006	Health Hx Questionnaire		OK	Infopath	DGB
9002	McBeal, Allison	05/15/2006	Consents and Release Packet		OK	Tickler	DGB
9002	McBeal, Allison	05/15/2006	Consent for Medication		OK	Tickler	DGB
9011	Pier, Chelsea	09/02/2007	Intake and Psychosocial	10/02/2007	Soon	Online form	DGB
9011	Pier, Chelsea	09/02/2007	Admission Note	09/16/2007	Soon	Online form	DGB
9011	Pier, Chelsea	09/02/2007	Health Hx Questionnaire	10/02/2007	Soon	Infopath	DGB
9011	Pier, Chelsea	09/02/2007	Consents and Release Packet	09/16/2007	Soon	Tickler	DGB

The EHR and the Forms Module enable each clinician to complete all of their clinical documentation online and to monitor their caseload's up to the minute requirements. Program managers will also be able to easily monitor the documentation requirements across clinicians as well as those for an entire program or unit. This powerful tool will enable you to review your agency's compliance with internal and external requirements at a glance.

➤ By Invitation Only: Clinical Advisory Board

As part of our Forms Library project, IMA is assembling an Advisory Board to help with the selection and design of the materials for this library. Some of you have already received a communication from IMA about this Advisory Committee. We are hoping for broad participation across all of our various agency types and to receive input from all your clinical documentation experts.

While this Committee is by invitation only, if you know of someone that you would like to nominate, we'd love to talk with them. Please email Georgeanne@imasys.com with their name and contact information. As soon as we fill the primary slots on the board, we will publish the schedule for our first meetings.

The operation of this committee will be planned so as not to put too much of a demand on the time of the participants. We expect that we'll have a single in-person kick-off meeting. After that, all meetings and communications with participants will be via email, conference call, and webinar. The benefits of participation to you and your agency are that you'll have a voice in the shape and content of the forms that will be available in this library. In addition, when your input is incorporated into the forms, your agency may be able to utilize the library forms without further customization. You will also have a voice in related documentation design decisions associated with the ongoing development of the IMA EHR software.

➤ The Service Corner

IMA is pleased to introduce this new section as a regular feature of the Quarterly. It will include articles from IMA's topnotch Customer Service Team.

➤ The Service Beat

Getting the most out of your contact with the IMA HelpDesk

What can you do to optimize your contact with the IMA HelpDesk? This article will address the things that you can do to get the most out of your contact with the HelpDesk

as well as what you can expect from it.

General HelpDesk information: The HelpDesk hours of operation are from 9:00am to 5:00pm, Monday through Friday. Office closures are announced in the Quarterly and posted on our website in the Calendar of Events. Email reminders are also sent the week of the closure.



HelpDesk Protocol:

All initial service problems and inquiries should be emailed to HelpDesk@imasys.com. This will ensure that all issues are received and responded to in a timely manner. Sending email to a specific IMA staff member's individual mailbox can delay the disposition of your service request. Phone calls should be reserved for emergencies where your system is down or a mission critical option is not functioning.

If you are not experiencing an emergency, use email instead of the phone. It is a more efficient way to communicate the details of your IMA concern and you will have a greater likelihood of getting your item diagnosed and resolved quickly. With email, a record of the report/request is automatically created and can be immediately tracked by the IMA HelpDesk software.

When emailing the HelpDesk, clearly identify the type of issue being reported as either a system malfunction, a request for

help/advice or training, or an information request.

When reporting a problem, always identify the option used, the specific selections made, the date and time when the problem occurred and how the results were different than what you expected. Please also indicate when the option last worked as expected. You should also include if there have been any recent changes to your server, PC, and/or database. You'll also want to indicate any specific error and/or informational messages given by the IMA system. All of this is necessary as the IMA service team will need enough information to effectively replicate and troubleshoot your item.

You can expect courteous, professional and thorough attention to every issue and inquiry from the IMA HelpDesk. You will receive a response to your initial inquiry within 24 hours. If the issue or inquiry is not resolved during the initial contact or within the first 24 hours, updates will be provided in 48 hour periods following the first 24 hour contact. Your non-emergency item or request will be addressed in the order in which it was received.

The IMA Service Team looks forward to providing the highest level of service to all IMA organizations. If you have any suggestions on how we can better meet your IMA service needs, please feel free to email HelpDesk@imasys.com.



➤ HelpDesk Tips



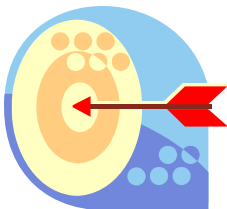
Art Erickson, IMA HelpDesk

IMA Service and Support: When is it covered and when is it not?

In this column I would like to review the mission of the IMA HelpDesk, how it provides service to our customers, and how IMA charges for these services.

The mission of the IMA HelpDesk can be summarized as follows:

Our primary mission is to assure that the IMA software installed on your system continues to run, bug-free, with full functionality as designed. We are eager to learn about any problems or bugs that you may encounter and will work diligently to correct them quickly.



The second mission, and of equal importance, is to install and implement periodic updates to your IMA Desktop software. These typically include functional improvements, new features requested by customers, and changes needed to address evolving healthcare practices and HIPAA requirements.

The HelpDesk will respond to all of your requests promptly. In most cases the support that we provide is covered by the IMA Support Contract, for which your agency pays a fixed monthly fee based on the number of IMA user licenses on your system. This “covered

support” is limited, however, in two ways.

- It is available only to users that have been trained in the use of the IMA system. Only after a user is fully trained in the use of a particular module, can they obtain covered support on that module from IMA.
- It covers only operational problems of the IMA software. Issues related to the hardware, the network, the server software, or the PC software are not covered.

Assistance with issues beyond the “covered support”, including the limits mentioned above will be billable at our standard Time and Materials (T&M) hourly rate. In cases where we feel that the reported concern does not fall under the “covered support” category, we will identify it as such and deal with it only after you direct us to proceed on a T&M basis.

Training is required for the proper utilization of this very complex system. The initial user training is provided at the time of installation. Whenever new users come on board or additional modules are implemented, you need to arrange for additional training. The most efficient way of securing this training is through scheduled face-to-face sessions with IMA or through webinars. The least efficient way is for new or inexperienced users to start using a module on their own and then place billable support calls to the IMA HelpDesk.

➤ PCS 2007

It's that time again! As you know, the bi-annual OMH Patient Characteristics Survey is upon us with an October 22-28 survey period.

IMA has added support for the new OMH PCS 2007 report and data submission. If your agency has previously licensed the PCS module, you require a software update to incorporate the changes OMH has introduced for this new survey period. The fee for the 2007 upgrade is \$1,000. This fee includes the software changes and the associated support to implement and submit your 2007 results electronically to OMH.



If you've been doing the survey response manually and you'd like to save yourself a headache this year, you can add a full new PCS license for \$2500.

Please let us know immediately if you are interested in this module.

➤ v16: What's New

IMA is continuing to enhance and add features to the current v16.0 release. Following are the highlights of the most important new features that were added during the last quarter. Some of these are premium items but all are included for free under the new EHR subscription license.



Billing:

Medical Services Module

This new module supports the data capture and billing submission of medical services that require the

reporting of more than one procedure and/or diagnosis per visit. (premium)

Paper Billing Forms

Here is good news for those of you who have been expending a lot of time and effort editing the UB or HCFA forms by hand for your private insurance payers. We now have an improved and very intelligent printing program that is fully configurable and customizable. No matter what your carrier may require that you print on their forms, IMA can do it. There is no longer any reason for your forms to not be completely filled out automatically be the system exactly as required. Forms for every payer should be ready for mailing right out of the printer. Contact us to arrange for any general agency or payer specific customization. (configuration or training T&M)



PROS

The PROS module has been fully deployed at two IMA customers who were selected by New York State as early adopters of this new type of service. The IMA system is used to record and track all services, document medical necessity as required, and to compute the appropriate service levels for submission to Medicaid within this very complex monthly billing algorithm. These two agencies have already billed Medicaid and have received payments for these services. (premium)



Reports:

Are your private insurance receipt amounts what they should be?

Up to now you had no easy way to track the difference between the amounts that the insurance companies actually paid on your claims as compared to what you expected from them. This new fiscal report will do just that. The Over/Under Report will identify any over and under payments for each private insurance payer based on the expected amounts defined for each.

A/R Report Enhancement

The Accounts Receivable Report has been enhanced to include COPS only claims even though they have a \$0.00 basic rate expected amount. This will be helpful for any agency with Medicaid Managed Care clients.

COPS and CSP rates

A new Desktop program is now available to enter and manage your COPS and CSP rates. Up to now this was available only through the legacy options.

Performance Contract Monitoring

Our portfolio of custom modules to track and manage performance based contracts is expanding. Each of these is custom configured to capture the unique data requirements specified by the contract. This data along with the contracted target numbers is tracked, computed periodically as needed, and the appropriate reports specified by each funder are generated. We now have the following three performance contract modules (premium):

1. ATI contracts
2. NYC DMH contracts
3. MHRA FOCUS contracts.

Group Enrollment Report

This new end user report lists all of the groups that a client is enrolled in for a single client, across a clinician's caseload or within a program.



IMA Calendar:

Multiple enhancements to include:

New view: In addition to the views currently available to see all of the appointments for a specific Staff, Client or Client Group, you can also now select a specific Location (SCHLOC).

Multiple Staff: We've added a very powerful and exciting new option that enables you to view a combined calendar for multiple staff members. For instance, you could view the calendars for a clinician, a psychiatrist, and a supervisor all at the same time and schedule a treatment team meeting.



New filters:

The **activity code help window** is now automatically filtered to show only the activity codes that are cross-referenced to the specific program being scheduled.

There is a new user selectable radio button to control whether or not to include terminated clients within the **client help window**.

To eliminate errors resulting from selection of the wrong program,

we've added a feature where **closed client programs** are not available for selection within the Calendar client Program field, so that an appointment cannot be scheduled for a client within a closed program.

Printing: Schedule Reports have undergone miscellaneous printing enhancements to include more columns and additional headers.



Clinical:

Treatment Plans: Enhancements include:

Printing: We've dramatically enhanced the extent to which the output of the IMA treatment plans can be customized. The IMA output can now be configured to merge with a PDF form of any complexity. The plan document is thus capable of assuming almost any format specified by the customer (configuration T&M).

Signatures: The "awaiting signatures" section and associated

logic has been greatly expanded to handle many additional specifications, screen selections and filters.

Progress Notes

The new automatic filtering for the activity code help screen was added within Progress Notes, as described in the Calendar enhancements above.

InfoPath Form Templates

We've added support for storing InfoPath Form templates on a webserver.

financial department ranging from the creation of an easy to read format for analyzing the bills to generating paper output for special cases when needed.

Caseload transfer between staff:

A client Transfer Utility that will allow you to transfer a caseload and/or appointments from one staff to another has been added. This will be enormously useful when staff leave or are reassigned.

Data warehouse Interface: A new data extract utility will enable you to extract data from your IMA server to synchronize with a data warehouse.

Change audit log: A database will track all significant data changes in the system plus every access to all client records by user, date and option.

Enhanced Client Registration: Enhancements to the Client Registration option include a new User Interface and additional CLIENT and PROGRM fields in the default add/change screens.

➤ **v17.0: Coming Soon!**

Work on v17.0 has already started and a release date will be announced soon. Among the many new features and enhancements to be included in this release are the following:

Paper copy of electronic bill:

You'll be able to produce hard copy HCFA and UB forms directly from your electronic claims submission files. This could potentially open up a set of new capabilities for your

**Q4 2007:
Calendar of Events**

***Each webinar will be 2:00 PM*

October

4-5 - IMA Closed: Sukkot

10 - General Webinar: Impact of NPI

15 - PCS Webinar: All you need to know

November

14 - PCS Webinar: TBA if needed

22 - IMA Closed: Happy Thanksgiving!

December

5 - General Webinar: The IMA Forms Library

19 - General Webinar: Custom Treatment Plan Output

25 - IMA Closed: Merry Christmas!

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.

Abstracts:

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 and how to create payer specific templates using the Desktop

PCS: All you need to know: Learn how to get started with the PCS 2007 upgrade: access PCS client data, run the 2007 PCS Report and respond to data omissions and errors. Also learn how to map and translate your IMA codes to the required codes for the OMH PCS Survey.

The IMA Forms Library: Explore the new library of forms.

Custom Treatment Plans: See the new IMA Treatment plan design capabilities for developing custom output layouts and incorporating these within the standard IMA output models.