2018 NEW YEAR UPDATE

Sammy Systems

Electronic Health Records

Family owned and operated for over 30 years

Sign up for our 2018 News Webinar on 1/22/18 at 7:30PM EST where we will go through the details covered in this document in great detail.

Click here to sign up!

We are here to support you and your practice in all you do.

Our goal is to provide you with the best service and support as we possibly can.

If you do not believe we are meeting our goal, please let us know!

ICS Software, Ltd.

Serving the Medical community since 1986

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Click on any topic below to go directly to it in this document.

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2017 HIGHLIGHTS

PERFECT MIPS SCORES

We are proud to report that over 800 Sammy users have achieved scores at or above 80% with over 500 providers with a perfect score of 100%! This will get them the highest possible bonus for their Medicare approved charges in 2019. Congratulations to all of you!

NEW MEASURE CALCULATOR

The development of the new Measure Calculator and updated registry website has been completed. A lot of research and development was required to deliver a comprehensive tool that makes it simple to understand your MIPS scores and report them to the registry.

QCDR AND MEASURE APPROVAL

For 2018, our measures were approved by CMS as QCDR measures. This means that getting a 100% score in 2018 will be easily achievable; even easier than it was for 2017. Our approved measures have to do with adult heel pain, pediatric heel pain, pediatric flat foot, bunions, hammertoes and ulcers. Measures 126 and 127 can still be used as well.

All of our measures can be used for ANY PLACE OF SERVICE, which means that ANY type of Podiatry practice can use and get credit for those measures.

We never planned on being a registry until 4 years ago when we realized the kind of support needed to help our clients through the maze of regulations. We will continue servicing our clients so they do not need to call or deal with anyone else, and at the same time afford them extra points wherever possible to achieve the highest possible scores. We have made the workflow in Sammy as simple as can be so everyone can participate.

MX CONNECT RELEASE

This year, we deployed our new service that allows for email, text, phone calls and same day appointment texts so patients do not forget their appointments and no-show rates moves to new lows. Many have signed up with the service and happily it is performing as expected. Those of you who have not yet signed up should give it a try!

BILL FROM NOTE

Our BFN feature is catching on. For most offices, this feature can negate the need for routing slips since the generation of the note can create the claim at the same time. Next chance you get, check out the 19-minute webinar on our website to get a sampling of how it works.

DOCSHOP PRO

Everyone needs supplies. It gets harder and harder to keep track of things you use and need to order. With this service, you can save some money and have your own concierge buyer at your disposal to assist in the mundane tasks or returns, see what's available, etc.

PREPARING FOR 2018

SAMMYNITE

We will be hosting SammyNites on the following dates in the new year:

SAMMYNITE AT THE SAM CONFERENCE

- When: Thursday, January 11, 2018 from 7-10PM
- Where: Disney's Coronado Springs, 1000 W Buena Vista Drive, Buena Vista, FL 32830

Please sign up for SammyNite on the home page of our website, www.ICSSoftware.net. Your colleagues who do not yet have Sammy are welcome to join as well. Please share our website link with them and have them sign up separately. We hope to see you there!

LONG ISLAND PRACTICE SUMMIT (AKA SAMMY WEEKEND)

Save the date!

- When: Saturday, March 24, 2018 and Sunday, March 25, 2018
- Where: Radisson Long Island Hotel in Hauppauge, NY

For the third time, TLD Systems and Sammy Systems have teamed up to sponsor a two-day event March 24th and 25th (Saturday/Sunday) at the Radisson Long Island Hotel in Hauppauge, NY. As in previous years there are lectures, workshops, Sammy staff workshops and SamNotes for Doctors tracks.

Sammy workshops for Staff

A full day (Saturday or Sunday) Sammy review and features in Sammy everyone should know. We'll cover all of the new Clearing House changes, MIPS for the office staff, new autopost and posting features, online intake forms, new claims attachments and much more.

SamNotes workshops for Doctors

A full day (Saturday and/or Sunday) where we will review "everything you ever wanted to know and need to know about charting in SammyEHR". Learn workflows that you never knew existed while you enhance your knowledge of our unique and special template language and Wizard. The speed in which you do your note AND the quality of your notes can be better than you think.

Sammy staff will be on hand offering hands on lessons and training in all of the Sammy/SamNotes tracks. You should contact our finance team to get on the list if you plan on attending. The cost is $259 per day.

MEDICARE PART B FEE INFORMATION

The 2018 Medicare fees are available to download on or after January 1st. We will notify you via the yellow bar when they are available for you to download and if any other action needs to be taken. **Click here to view our FAQ with instructions on how to download your fees.**

We are hosting helpful webinars the first week in January regarding Medicare fees, eligibility and Medicare secondaries. Click here to sign up!

We always recommend increasing your fees by 10% when you download them in case the fees are increased throughout the year. (Y*our usual and customary fees must be higher than the Medicare approved fee).*

Collect the deductibles following the methods we have taught you, making sure to indicate the deductible amount in the Amount on Form box on Medicare claims. If you collect deductibles, send your claims out that day.

For those of you who are Non-Par, you MUST follow Medicare's rules.

Interested in updating ALL of your fees? View our FAQ on how to globally change your fees in Sammy.

ELIGIBILITY RESET

When you start Sammy for the FIRST time this year, Sammy will AUTOMATICALLY scan your patient records and reset the deductible data so you are ready to start checking the eligibility status for 2018. We encourage you to check eligibility for each patient when they come in for care as many people will be changing their insurance from what they had to what they believe they have. Some patients will have very large deductibles. Unless you know this, you may not have another opportunity to collect the charges for this visit. This applies to all primary insurances that can be checked.

Sammy includes practice management features to assist in this area. Check your settings in system setup under "MCR Elig Preferences".

All Sammy programs offer eligibility checking. If you do not yet have this valuable feature, send an email to our finance department and ask to be contacted to add it to your system. *The cost is small compared to what you stand to lose.*

The batch eligibility checking feature for Medicare claims, as in previous years is inoperative for the first week of the New Year. This is because Medicare does not always reset the deductible for all patients timely and we do not want to provide invalid results to you. If you collect Medicare deductible money, read the instructions in the next section regarding how to make sure those claims go out.

For more information about batch eligibility and how it works, view this FAQ.

Contact our finance team to try it free for 30 days!

DEDUCTIBLE INFORMATION

The 2018 deductible is $183.00 *(same as last year)*

When you collect deductibles from patients, enter the $ in the billing screen in the "Amount on form" box.

Claims you have on hold from 2017 MUST be released manually. For those using our deductible feature, Sammy WILL NOT release these claims automatically.

To release claims on hold, go to the future listing in Sammy. Mark the claims to release as "SENDNOW". Here is a helpful article from our FAQ that explains how the Medicare eligibility system works.

There is a deadline for filing a Medicare claim. Medicare claims must be filed no later than 12 months after the date when the services were provided.
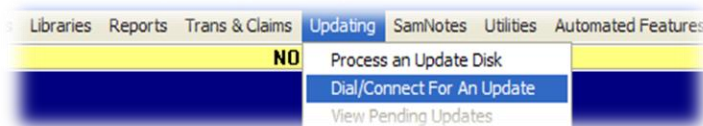
- Ex. For a service provided on January 25, 2017, Medicare must receive the claim no later than January 24, 2018.

Know the lingo: The doctor receives an EOB (Explanation of Benefits). A Patient receives a MSN (Medicare Summary Notice).

UPDATING CCI, NPI AND PECOS DIRECTORIES

Updated CCI (if you subscribe) and NPI Directories have been placed on the BBS. To get the updates, please do the following:

1. Click on "Updating".
2. Click "Dial Connect for an update".
3. Double click on the appropriate updates you would like to download for. (**CCI and Policy Updates**, one or more of the **NPI State Directory updates** and the **PECOS Feature Update**). Remember, you can get more than one state for the NPI directories if you need to.

If you download a state by mistake or if you want to remove a state from your system, first search for a doctor and click "search state listings". Then, right click on the state you wish to delete when the yellow choice box appears.

MIPS NEED TO KNOW (2017 PERFORMANCE PERIOD)

HOW TO REPORT YOUR MIPS DATA

Since you are already reporting Quality measures through our registry, we made it easy for you and expanded the registry to be able to also report the other portions of MIPS (Advancing Care and Practice Improvement Activities) for 2017 reporting.

MIPS data will be uploaded to us via the new measure calculator you have received. A tutorial is being created now and will be available for you to view to assist in your upload. The updated calculator will enable you to view MIPS performance not only as an individual, but also as a group (by TIN). It will be your option regarding how you would like to report.

We have sent out several communications via phone and e-mail to practices that have not met the minimum requirements to receive points for Advancing Care in 2017. If you did not meet the minimum requirements for Advancing Care, you will still be able to report Quality and Practice Improvement activities and be eligible to receive a positive payment adjustment.

If you are planning on reporting via our registry and have not yet done so, please click on Utilities → Account Management → Registry Account. Click on the "Click here to register for MIPS 2017" button at the top.
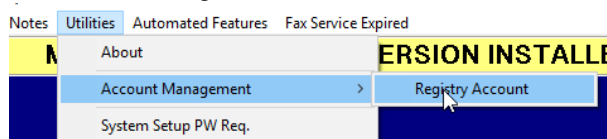
Please note: We are automating the EOB and TIN validation this year. Since you use MedXpress to send your Medicare claims from Sammy, we are able

to validate that you are in fact electronic submitters to Medicare. We are also able to validate your TIN from the electronic versions of the Medicare EOB, thereby saving you time regarding your registry uploads. If there are any discrepancies (such as the TIN or NPI not matching the one you signed up with), we will contact you.

RISK ANALYSIS - ANNUAL

"Conduct or review a security risk analysis in accordance with the requirements under 45 CFR 164.308(a)(1), including addressing the encryption/security of data stored in CEHRT in accordance with requirements under 45 CFR 164.312 (a)(2)(iv) and 45 CFR 164.306(d)(3), and implement security updates as necessary and correct identified security deficiencies as part of the provider's risk management process for EPs."

Commonly referred to as your HIPAA Security Manual, the result of the processes performed as required above must be fully DOCUMENTED. Should you be audited and pass on everything else, it would be a shame not to be able to produce this risk assessment.

More information is available at: http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/downloads/Stage2_EPCore_9_ProtectElectronicHealthInfo.pdf

Sammy clients may utilize the services of TLD Systems (www.tldsystems.com) to complete this requirement.

X-CHARGE (OPEN EDGE) RATE REVIEWS

The new year is a great time to request a rate review and lower your merchant account fees charged by X-Charge. If you would like to request a rate review, contact:

- Dayna Williams
  Phone: 801-769-7510
  Email: dayna.williams@openedgepay.com

NEW FEATURES / ADD ONS

MX CONNECT

Patient no shows are bad! They are bad for the patient since they are not getting the care they need and bad for the practice who reserved the time for the patient who does not show up.

For just pennies per appointment your patients will be e-mailed, texted and called to remind them of their appointments. Patients will also receive a text 2 hours prior to their appointment on the day of their appointment.

More information regarding MX Connect is available on our FAQ.

DOCSHOP PRO

There is a new button on the lower left side of SamNotes showcasing DocShop Pro. Shop and compare products from multiple suppliers and find the best price to save your practice the most money possible, but do it quickly and easily without haggling or fuss. The price you see is the price you and everyone else

pays...always. If you want to get quoted for a bulk order or a capital equipment item, you can do that on the website also.

Best of all, when you have an issue or question (regardless of who the vendor was that fulfilled the order), our Supply Concierge Manager will handle it for you. Simply drop them a line and let them handle the headaches of returns, backorders, the oh-so dreaded billing snafu or a rush delivery.

If you like what you see, click on the button in SamNotes and follow through to 'Register for your free account.' Then when asked Who is your EMR provider and How did you hear about DOCSHOP Pro, enter Sammy for both of them.

ELECTRONIC STATEMENTS

Let Sammy process and send out your patient statements automatically for you at a cost of 69 cents per statement / page. To view a sample, click on Reports → Patient Statements. A sample is available at the top of the screen.

More information regarding electronic statements is available on our FAQ.

ONLINE INTAKE FORMS FOR SAMMYEHR CLIENTS

With the addition of this feature, your new patients will be able to click on the Portal link on your website and be taken to the same Patient Portal you are now using. They will see a new option that allows for new patients to complete the New Patient Intake Forms securely, online. They will enter their name, address, phone number, cell phone number, insurance, referring doctors, medical history, etc. in almost the same manner as the paper intake forms they now complete in/for your office.

Upon completion, their portal account will be setup and a secure message will be sent to the practice.

When the patient is marked "here" in Sammy, your office will be able to import the information. You will see the information the patient completed online. Upon your approval, Sammy will set up a new chart for the patient. The history and other information will automatically be entered into SamNotes. Additionally, a copy of the intake forms the patient completed online will be added to the filing cabinet for future reference. Before the doctor sees the patient, one click in SamNotes will show everything to the doctor for review.

How much does it cost?

The cost is $60 per provider per month. For those of you who do not have a website, we can arrange for you to have a web page presence for a onetime fee of $249 (covers 3 years). This way you can direct patients to your website to click on the link so you can use this helpful feature.

COMING IN 2018

MIPS INFORMATION AND TRAINING FOR 2018

The information entered into the ARRA One Screen should ALWAYS match the intake forms with the patient's signature on it. Please note that MIPS applies to ALL patients, not just Medicare patients and is reportable based on NPI/TIN combination.

Webinars will be scheduled early 2018 with more information. For now, continue your existing workflows.

EPCS CHANGES

NewCrop is no longer using Verizon for its EPCS services. It is changing to a company called Exostar. This will require each provider to go through a new vetting process and must be completed by the end of February. The new service is easier and faster.

We will be sending out a notification to all clients who are currently using EPCS and provide a changeover form for those who request it. The vetting process must be completed by each provider by the end of February. EPCS will not work through Verizon after that point.

View this FAQ for more information.

INDUSTRY CHANGES

EPCS IS NOW REQUIRED FOR CT

Providers who prescribe controlled substances for patients in Connecticut are required to sign up for EPCS. More information is available on our FAQ.

NEW MEDICARE CARD

The new cards will be phased in starting in April. Patient's HIC numbers will be changing to a new format that Sammy is already set up to support.

SAMMY APP

We are developing a Sammy App to offer secure messaging and secure transfer of pictures / images.

COMMERCIAL ELIGIBILITY

More companies are being added to the eligibility service to allow you to gain more of an insight into your patient's insurance coverage details.

More information pertaining to the above will be made available to you early 2018.

NEW AND IMPROVED FAQ / SAMMY UNIVERSITY

We are going to release a new and improved FAQ / Sammy University website that is available to new and existing Sammy users only. It will include a ton of well-organized documentation for new clients, videos and troubleshooting FAQs for existing clients. We expect to release this to you in the first quarter.

COME VISIT US

Our updated conference schedule is available at http://icssoftware.net/conferences/

JANUARY 2018

- **IPED 2018 Winter Focus Retreat**
  - Lago Mar Resort • Fort Lauderdale, FL • Friday, January 5 – January 6, 2018
- **Annual Science & Management Symposium**
  - Disney's Coronado Springs • Orlando, FL • Wednesday, January 11 – January 14, 2018 • Booth 142
- **SammyNite User Group Meeting**
  - Disney's Coronado Springs • Orlando, FL • Thursday, January 11, 2018 from 7-10PM in Coronado A & B
- **Codingline 2018**
  - New York Marriott Marquis • New York, NY • Thursday, January 18, 2018
- **New York Podiatric Clinical Conference and Exhibition**
  - New York Marriott Marquis • New York, NY • Friday, January 19 – January 21, 2018 • Booth B5
- **MPMA: Great Lakes Conference**
  - The Henry • Dearborn, MI • Wednesday, January 24, 2018 – January 28, 2018

FEBRUARY 2018

- **CPMA: Sports Medicine Symposium**
  - Hartford Marriott Downtown • Hartford, CT • Friday, February 2, 2018 – February 3, 2018
- **21st Annual Georgia Summit**
  - Atlanta Marriott Buckhead • Atlanta, GA • Thursday, February 22, 2018 – February 24, 2018

MARCH 2018

- **33rd Annual No-Nonsense Seminar**
  - Holiday Inn Cleveland • Independence, OH • Friday, March 9, 2018 – March 11, 2018
- **ACFAS 2018 Scientific Conference**
  - Gaylord Opryland Hotel • Nashville, TN • Thursday, March 22 – March 24, 2018

APRIL 2018

- **DERMfoot 2018**
  - Renaissance Baltimore Harborplace Hotel • Baltimore, MD • Friday, April 13 – April 14, 2018

JUNE 2018

- **ACFAP International Pediatric Foot & Ankle Seminar**
  - Snake River Lodge & Spa • Jackson Hole, WY • Friday, June 1 – June 2, 2018
- **AAPPM: 2018 Summer Conference**
  - Hyatt Regency Columbus, OH • Thursday, June 21 – June 23, 2018

JULY 2018

- **APMA: The National, Annual Scientific Meeting**
  - Gaylord National Resort & Convention Center • Washington, DC • Wednesday, July 12 – July 14, 2018

HOUSEKEEPING ITEMS

PROTECTING YOUR PATIENT HEALTH INFORMATION

There are many types of threats that can affect the integrity of your workstations or server. As your practices store patient information on your computers it is especially important to ensure you are taking every precaution possible to protect your data from hackers and malware. Malware can range from mildly harmful such as sending emails to everyone in your contact list to business destroying such as ransom-ware which can encrypt your data making it unusable.

You can reduce your exposure to malware by doing the following:

1. Never open emails with attachments from people you do not recognize or expect. Sometimes emails may appear to be from trusted sources. It is good practice to not open emails with the following attachments, .exe, .vbs, .bat, .com, .scr, or .pif.
2. Ensure your systems have all of their latest Windows Updates and your anti-virus software is up to date.
3. Restrict non-work related web browsing. You can accomplish this by subscribing to content filtering for your SonicWall router. This will allow your office to block certain websites or categories of websites such as social media.
4. Make nightly backups of your SammyData (and database if you use EHR). Backing up is extremely important. If your data is corrupted by malware and you have nightly backups, you can have the previous night's data restored. If you do not back up your system you will not be able to restore the data and will have lost everything entered into SammyEHR.
5. Do not use versions of windows that are no longer supported by Microsoft.
6. Ensure your firewall is configured properly, especially in regards to remote desktop usage. Ensure you have a VPN for all remote stations (unless you are using HIPAA compliant versions of GoToMyPC

HIPAA SERVER ENCRYPTION

"A covered entity must, in accordance with §164.306… Implement a mechanism to encrypt and decrypt electronic protected health information." (45 CFR § 164.312(a)(2)(iv))"

Data at rest needs to be encrypted as well. This includes data stored on disk drives, backup tapes, or servers since they can be accessed from remote locations and in the physical location if not properly locked/secured.

 What does this mean for you? All of your data needs to be encrypted when resting. Resting is the time that you are not using the data – at night, weekends, holidays, etc. If you think the cloud is any safer, think again! In ANY case, YOU, the keeper of the data, are ultimately responsible. Aside from a small cost to encrypt your EXISTING server properly, if your server is stolen and you have a backup, your liability would be minimal. If it's not encrypted and it gets stolen, that's going to be a big problem. If your server is old, let's get you a new one that comes encrypted already. If you have PHI on your local computers, that needs to be addressed as well by encrypting your hard drive.

If you have not yet done so, we recommend that you get your servers encrypted ASAP. Need help? E-mail your request to our technical support department.

DAILY DO'S REMINDER

DAILY DO'S - MORNING INDEX

The morning index <u>must</u> be run each and every day you use Sammy. It performs many functions that if not run, will cause your Sammy system to not perform properly.

Some functions of the morning index include:

- retrieving eligibility results
- updating the morning news with new and relevant information
- organize Sammy so it performs as efficiently as possible
- puts previous day's appointments to be visible in the appointment calendar
- downloads the latest program updates to your system

END OF DAY REPORT (DAY SHEET)

The Day Sheet is a log of items billed, posted, corrected, etc. throughout the day. Use it to keep an eye on what is going on in your system. This report should be finalized daily and all changes/corrections must be made prior to finalization.

BACKUP

Backing up your system is not just something that is good to do; it is also a HIPAA requirement. You MUST back up daily to ensure that your patient's e-PHI (electronic protected health information) is protected and will be available for the next visit in case of an emergency. Remember to always keep your backup in a safe place and have a separate backup media for each day of the week that you treat patients.

We offer an offsite backup service to provide you with peace of mind and to help you satisfy requirements. Not only do we back up all of your Sammy data automatically each night, but we also verify the integrity of the backup to make sure your data was backed up in its entirety. Click to view more information about our offsite backup services on our FAQ.

Contact our finance department to get the ball rolling.

ACCOUNTING LEDGER REPORT (AGING)

This is the most important report in your Sammy system. It displays all open items for patients and insurance companies. Run this at least once per month to ensure you are receiving the maximum reimbursement, and to ensure that your claims are going out as you expect them to.

FYI: There is also an option to run the <u>report to show all claims that have never been</u> sent out of your system. This is a helpful tool for timely filing.

ADDITIONAL TRAINING

It is extremely important for your new employees to receive the proper training from the start.

Often times your seasoned employees who are trusted to train your new staff do not realize or see the importance in imparting certain information that your new employee(s) may need to succeed and work as **efficiently** as possible. If you have a new employee who needs training, we can tailor a package **specifically based on your needs.**

Internet Training: $100 per 1 hour session
On Site Training: $500 per 3 hour session *(available only if you are within a 1 hour drive of our office)*

METHODS OF NOTIFICATION AND COMMUNICATION

YOU, OUR CURRENT CLIENTS ARE OUR PRIMARY GOAL!

The healthcare industry is ever changing and we all have to change with it. Our primary goal at ICS is to support YOU, our current Sammy users to the best of our ability. Our support and training departments care about you and are being trained daily to stay on top of the industry changes and updates to Sammy so they can help you to the best of their ability.

TRAINING WEBINARS

We use the Educational Webinars page to provide a place for you to sign up for topics you are interested in learning about. The availability of these webinars is usually announced via the yellow bar. We encourage you to visit this page often. Please send your suggestions on topics you would like to learn about to our training department (e-mail training@icssoftware.net) and we would be happy to rotate your recommended topics into our lunchtime webinars!

FAST CHAT

Fast Chat is available directly from the patient chart program in Sammy from the hours of 9AM – 5PM EST. It is best used when you need a quick question answered.

FREQUENTLY ASKED QUESTIONS

The information included in our FAQ is updated constantly. Please use it as a resource before you attempt to contact us. The easiest way to find what you are looking for is to type a keyword into the search box and glance through the articles that appear. If you cannot find what you are looking for, you will then have an option at the bottom of the screen to "contact support". If you need immediate assistance, of course give us a call.

YELLOW BAR MESSAGES

The yellow bar message that appears on the main Sammy screen is our way of communicating an important message with you. It should be read whenever it appears.   It often resolves an issue without

the need for a call, fax or email message or will provide information on a widespread issue that we are aware of and working to resolve.

BLASTS

From time to time you may receive a printout from us in addition to the R Update when you run your morning index. We use it to provide you with automatic signup sheets to SammyNites or webinars.

RELEASE NOTES

The release notes we provide when you receive updates are very informative and contain the information you need to know. Reading them may save you a phone call and a lot of time when you are trying to figure something out, or find out if your issue has been resolved.

ADDITIONAL SERVICES AND FEATURES

Contact sales@ICSSoftware.net if you would like additional information about the products below:

- Electronic Patient Statements
- Automated Appointment Reminders
- Online Intake Forms
- DICOM Interface (ultrasound/digital x-rays)
- Lab Interfaces
- Offsite Backup Services
- CCI (Correct coding initiative)

- Insurance Eligibility
- E-Prescribing
- E-Prescribing controlled substances
- SamNotes
- Automatic Posting (SimpleSam add-on)
- Fingerprint Reader
- Card Scanner
- Topaz Electronic Signature Pad

Don't want to pay for software support? Refer a client to us! For each provider you refer to us who purchases SammyEHR, you will receive a $1,500 credit towards software support.

Thank you as always for your continued support.
Please contact support@ICSSoftware.net with any questions.

Disclaimer: It is our pleasure to interpret all of the rules, requirements, due dates, etc. having to do with MIPS and HIPAA. However, you should know that it is your responsibility to know and understand all of the rules, requirements, due dates, etc. Most of this information is on SammyUniversity.com and in the FAQ (help.icssoftware.net) and taking information strictly based on verbal communication is not recommended.