User Manual

IMS ClientConnect – Super User

Updated: 3/26/2013
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>IMS ClientConnect Overview</td>
<td>5</td>
</tr>
<tr>
<td>2.</td>
<td>Login Screen</td>
<td>5</td>
</tr>
<tr>
<td>2.1</td>
<td>Logging in to IMS ClientConnect</td>
<td>5</td>
</tr>
<tr>
<td>3.</td>
<td>Top, Navigation, and Center Panels</td>
<td>8</td>
</tr>
<tr>
<td>3.1</td>
<td>Top Panel</td>
<td>9</td>
</tr>
<tr>
<td>3.1.1</td>
<td>Viewing/Editing your Profile</td>
<td>10</td>
</tr>
<tr>
<td>3.2</td>
<td>Navigation Panel</td>
<td>13</td>
</tr>
<tr>
<td>3.3</td>
<td>Center/Main Panel</td>
<td>13</td>
</tr>
<tr>
<td>4.</td>
<td>Home Screen</td>
<td>14</td>
</tr>
<tr>
<td>5.</td>
<td>New Client Registration</td>
<td>15</td>
</tr>
<tr>
<td>5.1</td>
<td>Welcome Packet</td>
<td>16</td>
</tr>
<tr>
<td>5.1.1</td>
<td>Welcome to IMS</td>
<td>16</td>
</tr>
<tr>
<td>5.1.2</td>
<td>Implementation Process</td>
<td>16</td>
</tr>
<tr>
<td>5.1.3</td>
<td>PM and Go-Live</td>
<td>18</td>
</tr>
<tr>
<td>5.1.4</td>
<td>Client Questionnaire</td>
<td>18</td>
</tr>
<tr>
<td>5.1.5</td>
<td>Hardware and Network Questionnaire</td>
<td>19</td>
</tr>
<tr>
<td>5.1.6</td>
<td>Hardware and Network Details</td>
<td>20</td>
</tr>
<tr>
<td>5.2</td>
<td>Additional Required Information</td>
<td>20</td>
</tr>
<tr>
<td>5.2.1</td>
<td>Office Information Gathering</td>
<td>20</td>
</tr>
<tr>
<td>5.2.2</td>
<td>Data Conversion</td>
<td>20</td>
</tr>
<tr>
<td>5.2.3</td>
<td>Clearing House Identification</td>
<td>20</td>
</tr>
<tr>
<td>6.</td>
<td>Employee Registration</td>
<td>21</td>
</tr>
<tr>
<td>6.1</td>
<td>Adding/Deleting/Activating/Deactivating an Employee</td>
<td>21</td>
</tr>
<tr>
<td>6.1.1</td>
<td>Adding an Employee</td>
<td>21</td>
</tr>
<tr>
<td>6.1.2</td>
<td>Deleting an Employee</td>
<td>24</td>
</tr>
<tr>
<td>6.1.3</td>
<td>Activating/Deactivating an Employee</td>
<td>25</td>
</tr>
<tr>
<td>6.2</td>
<td>Editing Employee Details</td>
<td>26</td>
</tr>
<tr>
<td>6.2.1</td>
<td>Editing Employee Details from the Employee Registration Main Screen</td>
<td>26</td>
</tr>
<tr>
<td>6.2.2</td>
<td>Editing Employee Details from the Update Employee Screen</td>
<td>28</td>
</tr>
<tr>
<td>6.3</td>
<td>Customizing IMS Role CBT</td>
<td>29</td>
</tr>
<tr>
<td>7.</td>
<td>IMS University</td>
<td>31</td>
</tr>
<tr>
<td>7.1</td>
<td>Computer-Based Training</td>
<td>31</td>
</tr>
<tr>
<td>7.2</td>
<td>IMS Webinars</td>
<td>32</td>
</tr>
<tr>
<td>7.3</td>
<td>IMS User Library</td>
<td>33</td>
</tr>
<tr>
<td>8.</td>
<td>Training Schedule</td>
<td>34</td>
</tr>
<tr>
<td>9.</td>
<td>Online Support</td>
<td>37</td>
</tr>
<tr>
<td>9.1</td>
<td>Contact Live Agent</td>
<td>37</td>
</tr>
<tr>
<td>9.2</td>
<td>Submit Ticket</td>
<td>38</td>
</tr>
<tr>
<td>10.</td>
<td>Latest Releases</td>
<td>38</td>
</tr>
<tr>
<td>10.1</td>
<td>Request Update</td>
<td>38</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
<td></td>
</tr>
<tr>
<td>------------------------------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>10.2 Download Release Notes</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>11. News and Events</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>11.1 Company and Industry News</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>11.2 Newsletter</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>12. Billing and Coding</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>12.1 Clearinghouse Options</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>12.2 ICD-10 Updates</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>12.3 ANSI 5010</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>13. Incentives</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>14. Feedback</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>14.1 Client Satisfaction Survey</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>15. Sign Out</td>
<td>42</td>
<td></td>
</tr>
</tbody>
</table>
Disclaimer

Data used in this document such as patient’s name, provider’s name, address or similar are all test data. Resemblance to any data, actual persons either living or dead, is purely coincidental.
1. IMS ClientConnect Overview

IMS ClientConnect helps you achieve your health care organization’s goals by allowing users to share knowledge, explore ideas, and access tools and information. Through IMS ClientConnect, you can watch and choose from a wide selection of computer-based training (CBT) videos, schedule Ongoing Training, access Online Support with Live Chat, and keep yourself updated with Current and Archived Newsletters for product and industry news and events in your local area. Billing and Coding tools, news and updates, Industry Announcements, and Shared Tips are also made available through this site.

This manual will allow you to learn how to navigate around IMS ClientConnect; register a new client and/or employee; access CBT videos and IMS webinars through IMS University; schedule online training; contact online support; request the latest IMS update and download release notes; take note of current news and events; use the billing and coding tools; familiarize with the different incentives available; and provide client feedback.

2. Login Screen

2.1 Logging in to IMS ClientConnect

- Go to the site by typing in www.imsclientconnect.com. You will be asked to enter your Username and Password, which will be provided to you by the Project Manager. Click the Sign In button after entering your login credentials or press the Enter key.

- If you have trouble accessing your account, you can click on the Can’t Access Your Account? link at the bottom part of the screen.
You will be directed to the next page where you will be asked to identify the possible reason why you are having trouble signing in. If you forgot your password, click the **I Forgot My Password** option. If you forgot your username, click the corresponding option. Click the **Continue** button after selecting one option.

- If you choose the **I Forgot My Password** option, you will be asked to enter your username in order to reset your password.

- Choosing the **I Forgot My Username** option, on the other hand, will require your customer ID and email ID in order to get your login credentials.

- If you are not sure of your customer ID, you can click on the **Question Mark** at the right side of the customer ID. A pop-up window will open to show you where you can find your customer ID.
After entering all the necessary information, click the **Continue** button. You will soon receive an email with your login credentials.

- You know you have successfully logged in because you will be taken to the **Home** screen of IMS ClientConnect.
3. Top, Navigation, and Center Panels

- These are the different parts of the IMS ClientConnect that you will be encountering as you navigate around the site. These are permanent and fixed which means you will always be able to view and access these regardless of the screen and section you are in.
3.1 Top Panel

- Your username will be displayed at the topmost part of the screen. Click on the dropdown button beside your username to display more information such as customer ID, customer name, project manager, and alternate contact. Note that this panel will always be displayed regardless of the screen you are in.

- At the rightmost corner of the top panel of the screen is the **Logout** button. Click on the button to log out of your account.
3.1.1 Viewing/Editing your Profile

- You can view/edit your profile anytime regardless of the screen you are in. Click the dropdown button beside your username as shown previously, and click on the **My Profile** button.
The **My Profile** window opens, displaying your profile information such as your first and last name, phone number, email, username, office, job title, time zone, and computer literacy.

- **First and Last Name** – Refers to your first and last name.
- **Phone and Email** – Displays your given phone number and email address.
- **Username** – Refers to your username. This is the same username that is used to login to your account.
- **Office** – Shows your primary office.
- **Job Title** – Refers to your position in the office/clinic.
- **Time Zone** – Identifies which time zone you belong to.
- **Computer Literacy** – Shows your level of computer literacy. Click on the dropdown button to view the specific skills. Select your skills by checking the box beside each skill.

To change any information, just click on the field you want to change and add/edit/delete information accordingly.

Click on this link to change your password.
- **Receive CBT usage report via e-mail** – If you are an administrator, this checkbox will be viewable in your profile. You can check this checkbox to get a complete weekly CBT usage report of your employees in your inbox.

  - To edit your profile, simply click on the field you want to change, and edit the information.

  - To change your password, click the **Change Password** link at the upper right corner of the **My Profile** screen. This will open a new window that will allow you to change your password as desired.

  - If you want to have your password sent to your email, check the box for **Send Password via Email**.

  - Click the **Change Password** button to confirm changes.

  - To return to the **My Profile** screen, just click on **Back** at the upper right corner of the window.

  - Back at the **My Profile** screen, click the **Save** button to save any changes.
3.2 Navigation Panel

- At the left part of the screen is the **Navigation Panel** through which the different sections of the IMS ClientConnect can be accessed. Like the top panel, this will always be displayed regardless of the screen you are in.

- Click on the various tabs to move from one section to another.

3.3 Center/Main Panel

- The main information related to a particular section will be displayed at the center part of the screen. From here, you can view and access topics that are related to the master screen/section.
4. Home Screen

The Home screen displays a brief introduction and overview of the IMS ClientConnect. It also provides quick access to IMS Alerts, Company and Industry News, and other links. The IMS Alerts are also displayed right at the top of the Home screen. This is to give an easy access to the desired news from any place in the website. After logging in to your account, the site defaults to the Home screen.
5. New Client Registration

- Client refers to the office or clinic that will be using the IMS software. To register a new client, click the **New Client Registration** tab on the **Navigation Panel**.

- Once you have been registered, the tab no longer appears in the **Navigation Panel**. However, if you wish to continue using the tab and enjoy benefits of the information available out there, you can contact your Account Manager or Project Manager.
5.1 Welcome Packet

5.1.1 Welcome to IMS

This section provides a brief welcome note for the client. The progress bar at the top of the screen fills up as you complete the different sections under New Client Registration.

If you want a hard copy of the welcome note, click on the Print icon at the upper right corner of the screen to print the document.

Click the Continue button to move to the next screen. You can also manually select a section by clicking on it on the Navigation Panel.

5.1.2 Implementation Process

This section provides an overview of the IMS implementation process and the basic guidelines and requirements. It also serves as a user agreement.

At the top part of the screen, you have the option to edit and print the document by clicking on the corresponding icon. These icons will be displayed in most sections.
Click the **Edit** icon to go into Edit mode. Please note that you will need to click the **Edit** icon first before you can make any changes to the document. Otherwise, the site will not allow you to enter information on any of the fields.

You can choose to agree or disagree with the terms and conditions set forth by selecting the appropriate response at the bottom part of the screen.

If you agree with the set terms and conditions, you will be asked to type your name in the provided field. If you choose to disagree, you will be directed to a screen that says you have chosen not to continue and an email will be sent automatically to the project manager and salesperson.

At the lowest part of the screen is a navigational toolbar. This toolbar will only show up if you are in Edit mode.

- The **Back** button allows you return to the previous screen.
- The **Save & Continue** button enables you to save the changes made to the document and move to the next screen.
- The **Skip & Continue** button gives you the option to skip this section of the site and move on to the next screen.
  - Choosing this option will always prompt a warning asking you if you want to continue. Click **OK** to continue or **Cancel** to return to the previous screen.
5.1.3 PM and Go-Live

- This section provides a summary of the available training hours and allows you to identify the Clinic Project Manager. It also enables you to put in a request for a Go Live Date.

**Identify Clinic Project Manager**

- *Clinic Project Manager:

**Requested Go Live Date**

- *Date:

- *I agree to the information supplied above.

- *Please type in your name:

- Click the **Edit** icon to enter Edit mode.

- Type in the required information on the provided fields for **Clinic Project Manager** and **Date**. You can type in the date directly on the field or click on the **Calendar** icon to the right side of the field to select the date.

- As before, choosing the **I Agree** option requires you to enter your name.

- Click on the **Back, Save & Continue**, or **Skip & Continue** button as the need calls for it.

5.1.4 Client Questionnaire

- This section allows you to enter office information as well as upload any documents in electronic format. By completing this section, you will ensure a smoother implementation process.

- To enter office details, click on the **Edit** icon to enter Edit mode. Type in the information under each of the headers. Scroll to the right for more headers.
Similarly, enter the details of the documents in the provided table by typing in the information under their respective headers.

Choose the file you want to upload by clicking on the Browse button. Delete said file by clicking on the red X button.

To add more offices or documents, click on the Add More option.

Click on the Back, Save & Continue, or Skip & Continue button, whichever is applicable.

5.1.5 Hardware and Network Questionnaire

This section collects your hardware information particularly on printers, scanners, patient pictures/webcam details, and network connectivity among others.

To fill in the questionnaire, click on the Edit icon and enter the necessary details accordingly.
5.1.6 Hardware and Network Details

- This section provides information on the specific hardware, network and other technical requirements, and guidelines for IMS.
- Click the Back button to return to the previous screen or the Submit button to submit all the gathered information including those from the previous sections.

5.2 Additional Required Information

5.2.1 Office Information Gathering

- This section allows you to enter additional information about your office. You can choose to Save & Continue or Skip & Continue by clicking on the respective buttons.
- You also have the option to print this section by clicking on the Print icon at the upper right corner of the screen. This icon will be displayed in the succeeding sections as well.

5.2.2 Data Conversion

- This section gathers information on data conversion. Click on the Back, Save & Continue or Skip & Continue button, whichever is applicable.

5.2.3 Clearing House Identification

- This section contains pertinent questions about your chosen clearing house, if any. Click on the Back button to return to the previous screen or the Submit button to submit all entered information including those from the previous sections.
6. Employee Registration

- IMS ClientConnect allows you to register all employees who will be using IMS ClientConnect and set their individual account settings.

**EMPLOYEE REGISTRATION**

<table>
<thead>
<tr>
<th>Name</th>
<th>Username</th>
<th>Email</th>
<th>Change Password</th>
<th>Customize CBT</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
<tr>
<td>Create User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
</tbody>
</table>

[1 to 10 of 183] 19 Page(s): « 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19

6.1 Adding/Deleting/Activating/Deactivating an Employee

6.1.1 Adding an Employee

- To register an employee, click on the Add button.

- You will be directed to the New Employee screen, where you will be asked to enter information about the employee.
**NEW EMPLOYEE**

- **First and Last Name** – This is where you will enter the employee’s first and last name.

- **Phone and Email** – This is where you will place the employee’s contact number and email address, respectively.

- **Username** – This will be the name that the employee will use to login to IMS ClientConnect. This is automatically populated as the email of the employee. If you want to change it, simply click on the field and edit the information.

  - If you do not make a username, “User Not Created” will be displayed under the Status column in the Employee Registration screen. Under the Username column, there will be a link to “Create User.” Clicking on this link will take you the Update Employee screen, from which you can create the employee’s username.

---

<table>
<thead>
<tr>
<th>Name</th>
<th>Username</th>
<th>Email</th>
<th>Change Password</th>
<th>Change Customization</th>
<th>Customize CBT</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User not created</td>
</tr>
</tbody>
</table>

Signifies that no username has been created.

Click on this link to go to the Update Employee screen to create the username.
o **Office** – Identifies the primary office the employee belongs to.

o **Job Title** – This is the employee’s designated position in the company. If the job title is not in the list, choose “Other” and type in the job title in the provided field.

```
Job Title: Other
```

o **Time Zone** – Identifies to which time zone the employee belongs to.

o **Computer Literacy** – Identifies the employee’s level of computer literacy. Select the computer skills of the employee by checking the respective boxes.

```
*Computer Literacy:*
1. Turn the computer on and off
2. Can work with mouse and keyboard
3. Locate start button at windows
4. Move and use desktop windows
5. Use the recycle bin to delete files
6. Can connect a USB drive to a computer
7. Can compose an email/write an email
8. Can install a program
```

o **Admin User** – Specifies whether the employee will be given admin rights or not. A user with admin rights has more user privileges. Choosing **Yes** will make the employee an admin user.

```
Admin User: No
Yes
No
```

o **IMS Role** – Identifies the role of the employee in IMS. Select the appropriate role by checking the box beside it.

```
*IMS Role:*
Front Desk End User
Front Desk Super User
Clinical End Users
Clinical Super User
Billing End User
Billing Super User
Cosmetic End Users
Cosmetic Super User
```

o **Status** – Indicates whether the account will be active or inactive. Active accounts are accounts that can already be used while inactive accounts are those that are not yet usable.

o **Allow CBT Request** – Checking this box will allow the employee to make CBT requests should he or she wish to view CBT videos which are not assigned to his or her role.
Click the Save button to save all entered information. To register another employee, you can click Save and Add New as this will immediately take you to another New Employee screen after the current account has been saved.

The message “New Employee Has Been Registered Successfully” will display on the Employee Registration screen.

6.1.2 Deleting an Employee

Search for the employee using his or her name, username, and/or email. You can also specify the account status i.e. all, active, or deactivate by choosing the respective option under the Status dropdown.

Click the Search button after all the necessary information has been entered.

Check the box beside the employee’s name.

Click the Delete button.

A confirmation box will pop up. Click Ok to confirm deletion or Cancel to return to the previous screen.

The message “Employee Has Been Deleted Successfully” will show up on the Employee Registration screen.

Filters the search to either “All,” “Active” or “Deactivate” statuses.
6.1.3 Activating/Deactivating an Employee

- You can activate or deactivate an employee’s account. Activating an account ensures that the employee can use and access his or her account. Deactivating an account renders an account inactive and unusable. You can opt to deactivate rather than delete an account for employees who are on temporary leave so you will not have to create an account all over again.

- Search for the employee as previously shown.

- Check the box beside the employee’s name.

- Click on the **Activate** or **Deactivate** button.

- A pop-up window asking for confirmation will appear. Click **Ok** to confirm or **Cancel** to return to the previous screen.

- If the employee’s account has been successfully deactivated, the status will show as **Inactive**.

- On the other hand, if it has been successfully activated, the status will show as **Active**.
The message “Record(s) Status Changed Successfully” will be displayed on the Employee Registration screen.

6.2 Editing Employee Details

- You can still edit the employee details after an employee has been registered.

6.2.1 Editing Employee Details from the Employee Registration Main Screen

- Search for the employee using his or her name, username, and/or email. Click the Search button after all the necessary information has been entered.

- From this screen, you can see the patient’s name, username, email, and status. You can also change your employee’s password and customize the CBTs.

- To change your employee’s password, click on the Change Password link under the column of the same name.
  
  o The Change Password screen will come up. Enter the new password in the New Password field and type it again in the Confirm Password field.

  o Please note that IMS ClientConnect requires your password to have at least five characters. Otherwise, a warning message will pop up. Just click OK and enter a new password should this happen.
A message will appear in the box, “Password should be at least 5 characters long.”

You also have the option to have your password sent via email by checking the box beside it.

Click the Change Password button to confirm and save changes.

You can customize the CBT videos your employee can access by clicking on the Customize link under the Customize CBT column. By default, the CBT videos your employee can view are only those that are related to his or her IMS role.

You will be directed to the CBT Customize for Employee screen. Expand each category by clicking on it.

Select the specific modules the employee can have access to by checking the box beside each particular module.

Click on the Save button to save changes.
6.2.2 Editing Employee Details from the Update Employee Screen

- Search for the employee as previously shown.
- Click on the **Edit Employee Detail** icon to the left of the employee’s name or just click on the employee’s name itself.
- You will be directed to the **Update Employee** screen where you will find basically the same fields that are in the **New Employee** screen. Edit the information as you deem fit by clicking on its respective field.

- You can change the employee’s password from this screen by clicking on the **Change Password** link at the upper part of the screen.
  - The **Change Password** screen will come up. Change the password accordingly.

- You can also customize the CBT videos your employee can access by clicking on the **Customize CBT** link. By default, the CBT videos your employee can view are only those that are related to his or her IMS role.
You will be directed to the CBT Customize For Employee screen. Customize the CBT videos for each employee by checking the box for each module you want your employee to have access to. Click on the Save button to save changes.

6.3 Customizing IMS Role CBT

- You can customize the CBT videos specific to each IMS role through the Customizing IMS Role CBT option.
- Click on the Customize IMS Role CBT button.

The CBT Customize for IMS Role screen will come up.

1. Click on the category.
Expand each category by clicking on it.

Select the modules you want to include under each category by checking the box beside it.

Click on the module to view the CBT videos under it. Select the videos you want to include by checking the box beside it.

For some categories (Front Desk and Billing End and Super User), you have the option to add more videos to the Getting Started module by clicking on the Add More Computer Based Training Under Getting Started link.

- The “Add More..” link will be available for those CBTs which are common between multiple IMS roles.

Do the same for the other categories and modules.

Click the Save button to save changes.
7. IMS University

- IMS University is designed to empower you with the knowledge and expertise required to quickly become proficient with IMS products. It provides you access to CBTs or computer-based training videos, webinars, and user manuals.

7.1 Computer-Based Training

- IMS CBTs are tutorial videos for users of all levels. They are available 24/7, thus allowing you to learn at your own pace.

- This section shows a list of IMS roles as CBT categories.

- Click a category to display the modules under it.

- Each module has a progress bar that fills up as you complete the module.

- Click a module to view the video topics under it.

- A video topic is listed with its version, duration, CBT published date, view status, quiz status, and Play button.
  - A Version would signify what IMS version the video topic belongs to.
  - If the video has not yet been viewed, a “Pending” status will be displayed under View Status. If you have started watching it, “In Progress” will be shown. On the other hand, if you have finished watching it, the view status will be “Done.”
  - Quiz Status keeps track of whether you have completed a particular quiz or not.

- Please note that you have to disable pop-up blockers to play a CBT. Click the Play button to open the video screen.
 Close the screen by clicking the Exit icon in the lower right corner.
 You can also search for specific CBT topics by using the Search CBT feature.

Search CBT: [Search]

 To view a report on all quizzes for employees, click the CBT Quiz Report link.

CBT Quiz Report

- The quiz report shows a summary report and a detailed report of employee quiz attempts. Scroll down to view the rest of the document.
- To view the summary report of a particular employee, simply click on the employee’s name.

![CBT Quiz Report Table]

 Click Close in the upper right corner to close the window.

7.2 IMS Webinars

- IMS webinars are demonstrations and discussions of the many features and benefits of IMS offered to you for free. Each upcoming session is offered twice to accommodate Eastern and Pacific time zones.
- This section shows schedules of past and upcoming webinars.
Register for an upcoming webinar by clicking the corresponding **Register Now** link.

- **IMS Point of Sale**
  - Jenna Haskins
  - 16-Jul-12 12:00 PM PST
  - 60 Minutes
  - **Register Now**

View a past webinar by clicking on the **Show Past Webinar Details** link.

### 7.3 IMS User Library

- Access the IMS product reference information you want and need with only a few clicks via the new IMS Library. This comprehensive library provides a complete reference solution for your information needs.
  - You can quickly access the time saving documents like: User Guides, User Manuals, etc.
  - Click a category to view set of product reference documents listed under it.

- Click the icon to view the document on the browser or click the icon to download the document onto your system. The choice is yours.

- Note: Currently, the items listed under the System Requirements category are the ones which can also be viewable at the following path: *New Client Registration-*Welcome Packet-*Hardware and Network Details*. 
8. Training Schedule

- IMS offers a flexible and comprehensive curriculum of online courses. The training plan can also be customized based on your users’ specific needs and skill sets. This section enables you to keep track of the total training hours available and the number of training hours used. It also shows any scheduled training per module.

- The table below shows the total number of training hours available and the number of hours used per type of training.

<table>
<thead>
<tr>
<th>Type</th>
<th>Total Hours</th>
<th>Used Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>OST (On Site Training)</td>
<td>10.0</td>
<td>0.0</td>
</tr>
<tr>
<td>OLT (Online Training)</td>
<td>63.0</td>
<td>254.8</td>
</tr>
<tr>
<td>OLI (Online Implementation)</td>
<td>10.0</td>
<td>257.7</td>
</tr>
</tbody>
</table>

- You can also view all the available training categories and each of their modules. To view the expanded list of each training category, just click on the Plus Sign icon to the left of the category name. You can also expand all the training categories by clicking the Click Here To See Expanded List Of All The Training Categories link. The Show All Training(s) link, on the other hand, will allow you to see all available trainings.

- If the topic will have a related document(s), the Document(s) icon will be displayed. Likewise, if there is an available homework for that topic, the Homework icon will also be displayed.

- Expand the module by clicking on it to display more information such as date, time, purpose, and duration of the training, name of the trainer, meeting ID, and status.
IMS ClientConnect – Super User

1. Click on the module.

2. View the training details.

- **Date** – Indicates the date of the training.
- **Time** – Indicates the time of the training.
- **Purpose** – Identifies the training subject.
- **Duration** – Provides the estimated length of the training.
- **To Be Given** – Identifies who will be handling the training.
- **Meeting ID** – Refers to the ID that will be used for the GoToMeeting. Clicking on this link will take you to the scheduled GoToMeeting.
- **Status** – Pertains to the status of the scheduled training session.
- **Other Details** icon – Provides other information. The GoToMeeting details are displayed here. You can also click on the link so you will be taken directly to the scheduled GoToMeeting.
- **Training Outline** icon – This will display the training outline.

![Training Outline Icon]

- This section also allows you to identify all the topics you have already covered. Click **Yes** to indicate that the topic has already been discussed and **No** to indicate otherwise.

- Click the **Submit** button at the bottom of the screen to submit entered information. Click **Close** in the upper right corner of the screen or press the **Esc** key to return to the **Training Schedule** screen.
9. Online Support

- This section provides you access to the IMS customer support team.

9.1 Contact Live Agent

- If you have already gone live, you can talk with an IMS support agent online through the Contact Live Agent feature.

- To get your queries addressed, you will be required to enter some information. Select the agent number, choose your problem type, and type in your query in the Question box. Click the Connect button and you will be speaking to one of our live agents.
9.2 Submit Ticket

- If you have not gone live yet, you can contact the IMS Support Department through the **Submit Ticket** feature.
- To contact Support, type your query in the Question box and then click the **Submit Ticket** button.

10. Latest Releases

10.1 Request Update

- This section allows you to fill a form requesting for the latest IMS release.
- Fill in the required fields and then click the **Submit** button.
10.2 Download Release Notes

- This section allows you to download documents that detail changes or enhancements made to an IMS module or version.

- Fill in the required fields and click the Search button.

- Click the Download Release Notes button to download the release notes.
11. News and Events

11.1 Company and Industry News

- This section shows a list of news article titles. To read a synopsis of an article, hover your cursor over it.

COMPANY AND INDUSTRY NEWS

4/24/2012
Are Physicians the Key to the Acceptance of Personal Health Records?

That leads me to another key point: Without doctors using EHRs, you’re not going to get buy-in from patients to use personal health records to manage their own health. When patients are relatively healthy, encounters with healthcare providers are few and far between. Starting a PHR to track very occasional vaccinations or even to record a yearly exam isn’t a high priority for a lot of people unless its super easy to do. That means having data available from healthcare provider to load into a digital record, not typed by hand by the patient...

Read More

4/19/2012
Evidence that Meaningful Use dollars drive EHR adoption piles up - FierceEMR

- Click the Read More button to open a new tab and read the full article.

11.2 Newsletter

- This section provides access to the IMS newsletter archive.

NEWSLETTER

2012
- April Newsletter
- February Newsletter
- January Newsletter

2011
- December Newsletter

- Click a link to open a tab and read the corresponding newsletter.
12. Billing and Coding

12.1 Clearinghouse Options

- This section shows a list of IMS-integrated clearinghouses. Click on the corresponding url link for further information.

12.2 ICD-10 Updates

- This section at present shows a countdown to the ICD-10 release date. Upon release, this page will show ICD-10 information and updates.

12.3 ANSI 5010

- The ANSI 5010 page shows information on HIPAA 5010 readiness.

13. Incentives

- This section gives you information on the EHR incentive program, also known as Meaningful Use; the E-Rx or E-Prescription incentive program; the PQRI or PQRS incentive program; and Meditab's Refer-a-Friend program.

14. Feedback

14.1 Client Satisfaction Survey

- This section allows you to complete a client satisfaction survey.

- After completing the survey, click the Send button.
15. **Sign Out**

- Click this button which is located at the top right corner of the screen, to exit from the website.

- The **IMS ClientConnect Feedback** form would pop-up. Please fill in the questionnaire to help us know what you think about the website, so we can serve you better.