

E-Mail

E-mail is a useful and greatly utilized tool within the agency. Regular e-mail messages allow users to communicate with one another without having to track each down by phone or by foot. Additionally, the agency can create special templates for workflow communication to further automate personnel processes. Mail forwarding and the electronic Rolodex create time saving conveniences for users. External e-mail puts users in cyber connection with anyone, anywhere with an Internet e-mail address, and is therefore controlled by the system administrator with individual permission per user.

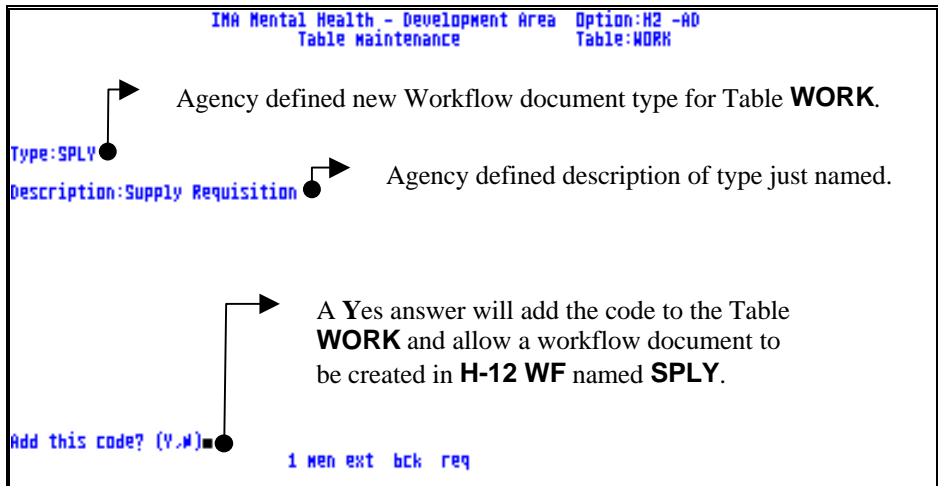
Types of Mail Messages

There are four types of basic e-mail messages on the Workbench. Mail is regular system e-mail that can be sent to any operator on the system and/or any Internet address with the appropriate permissions. Reminders are a special type of e-mail where the sender and the recipient are the same. These two types of mail require no special set-up on the system. Workflow mail requires special set-up and is described below. It creates an on-line record of a personnel activity. Group mail is an e-mail that is sent to several operators within pre-defined groups. This too requires special set-up and is described below.

Workflow Documents

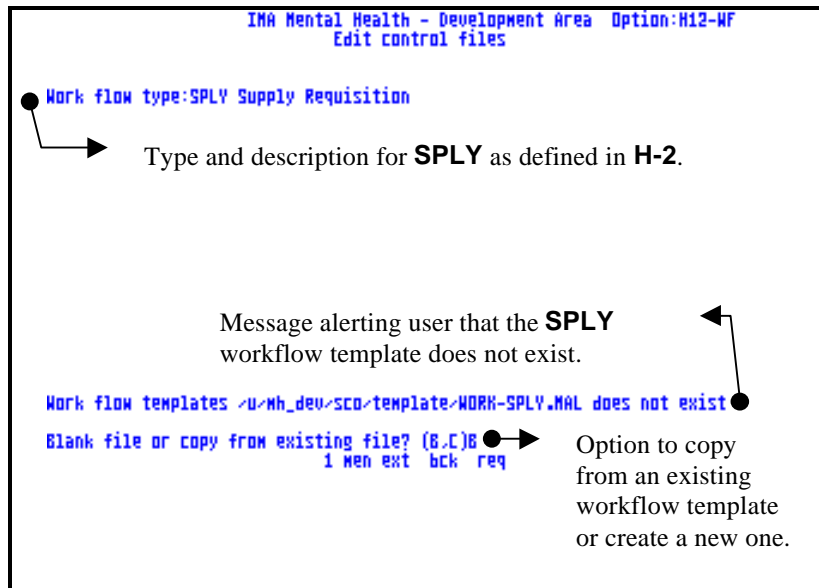
Templates can be created for internal documents that will be filled out online and distributed using the IMA Workflow feature. This allows any user to access a workflow document, complete it, and submit it to the designated recipient. This document, then, becomes a permanent record within the system of a personnel activity. There are two steps to creating a workflow document.

1. Table **WORK** in **H-2** – This table is used to create a code and a description for each workflow document that is being used.



H-2 AD to add a code to Table WORK

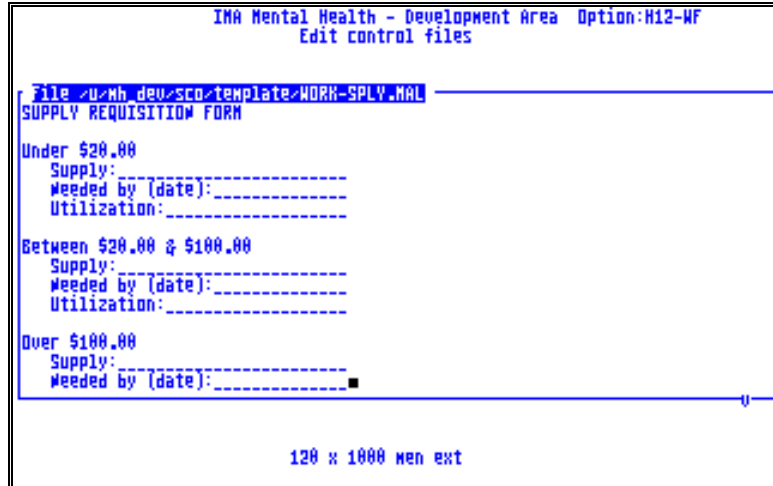
2. **H-12-WF** – The actual workflow document is created and maintained using this option once it has been added to the table **WORK**.



H-12 WF screen for creating new workflow template

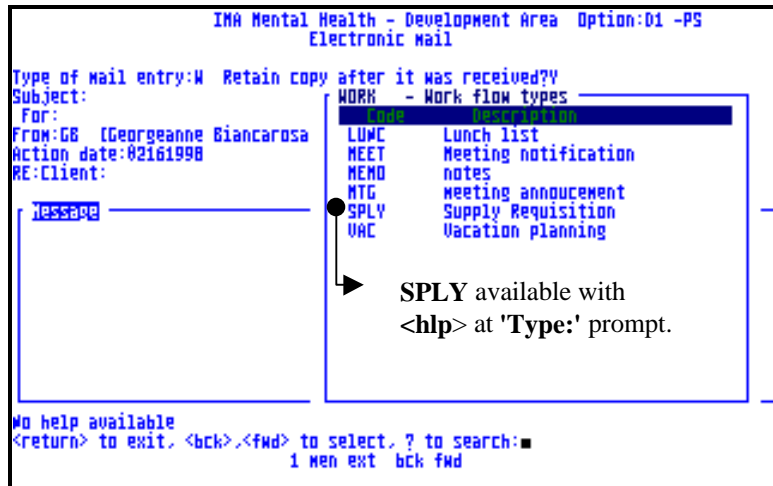
Once a template is named and added to the table WORK in H-2 and created in H-12 WF, it is available for use within the e-mail feature as shown below.

The templates created within each agency may reduce the paper clutter in personnel records by automating some of the workflow issues.



Template creation in H-12 WF

Once the template text and format are completed, press <Esc> to save the document and exit the memo box. The system will confirm with a 'Save your edits?' prompt and then ask 'Print this file?' This work flow template is now available at <hlp> in the D-1 PS 'Subject:' prompt after selecting Workflow at the 'Type:' prompt.



D-1 PS <hlp> for Workflow type mail

A default at 'Retain a copy after it is received?' in PS can be designated at the system level.

Group Mail

Group mail messages require that staff groups be defined on the system. These staff groups defined for group mail distribution are also used as the staff groups for any reports that present a selection on staff group. These staff groups are defined and maintained in D-1 AG.

Designate a group code to edit or enter. Up to six characters can be used. Once the group is named, it must be given a description and designated as Private or Allowed. Private entries are available only to the entry creator, while Allowed entries can be shared system-wide. The group can then be defined by operator codes by direct entry

or through selection with the enhanced <hlp> window, using "+" designations by highlighting the desired operator code(s) and entering <s> at each selection.

The staff group will then be available for selection for **G**roup type e-mail and in reports where staff group is a selection criteria.

Staff groups are not just for e-mail features.

These staff groups are utilized in scheduling and selecting reports from the calendar, as well as roster printing.

These options are found in the D Menu for Office Automation.

```
IMA Mental Health - Development Area  Option:D1 -AG
Electronic Mail

Group:EDSDM  Created by:GB  Entered on:09/10/1998  Added
Description:Edison Work Group
Allowed users:A
GROUP MEMBERS:
MS
MS
ES
DEM
TDM
GB

Group: 6 men ext hlp req
```

Staff Group definition screen at D-1 AG

Mail Forwarding

E-mail addressed to one person can be automatically forwarded to someone else. E-mail can be forwarded to another IMA user's mailbox or to someone on the Internet, if external e-mail is permitted for that user. This can be accomplished in three ways.

- To always forward system e-mail to another user and/or address, file **FWD-MAIL.DAT** must be set-up, identifying the original and new recipients with their corresponding addresses. This can be a permanent set-up or temporary if there is time sensitivity to e-mail response for vacationing users or staff on leave.
- To forward a message that has been sent to you to someone else, select the **Forward** option after reading the mail message in **D-1 NE** or **RR**.
- Mail may also be forwarded to another recipient at **D-1 PS**. This is accomplished by answering the '**Send this message to another recipient?**' with **Yes**. The cursor will move back to the '**For:**' prompt and another person can be selected from the list of operators or Rolodex, depending on assigned permissions.

This mail message may also still be forwarded from the Inbox through options **NR** and **SE**. option **NR** is available until the original recipient reads it, while option **SE** is available only if the message is designated to be retained after it is read during the original posting.

External Mail

Remote mail interfaces the IMA mail system with any external mail system using the SMTP and UUCP communication standards. There are five items involved in setting this up.

1. Setup file
2. Configure processing of incoming mail
3. User permissions
4. Configuration of SMTP or UUCP
5. Address book/Rolodex

Setup File

The setup file for external e-mail, **SYSTEM.MAL**, containing the technical information of the names and directories of the local UNIX server is located in **H-12 MS**.

*This is a sample file only.
Directories and devices vary
across installations
depending on the type of
UNIX operating system being
utilized.*

```

IMA Mental Health - Development Area  Option:H12-MS
Edit control files

file /u/wh_dev/scd/admindata/SYSTEM.MAL

# SYSTEM.MAL - mail definition file - our system id
imasys.com
! device where incoming mail files are
/usr/spool/mail
! device where uucp will put our files
/usr/spool/uucppublic/receive
! device where to place %mitted files (sub directory of $HOME)
util
! internet access
y
! system name, type of mail (IMAMAIL,UNIX,INTERNET)

120 x 1000 men ext

```

Control file *SYSTEM.MAL* in H-12 MS

Configure Processing of Incoming Mail

An entry must be made for the “cron” to run a program every few minutes. This program looks for new incoming mail and places it into the user’s IMA mailbox. The cron entry should be made in the crontab file for “root”. It should run the DELIVR script that is in the “/u/ima/bin” directory. The DELIVR script should be reviewed to make sure that the environment variables for the different directories are set up properly.

User permissions

The system administrator must add the entry of “**EEM**” to the operator option list in **H-3** in order to designate permission for a user to send external e-mail. All users will always be able to receive mail from external sources without the permission setting.

SMTP and UUCP

Consult your system documentation for the installation, configuration, and maintenance of these mail transport mechanisms.

Address book/Rolodex

The IMA Electronic Rolodex is integrated into the e-mail system to serve as the address book. Access is automatically provided from the e-mail system when external e-mail is activated per user permission. New entries can be made to the Rolodex using option **D-11**. For basic Rolodex functions, there is no further set-up required. However, for added features on the Rolodex, types of service and service qualifiers, among others need to be defined in the following tables in **H-2**.

1. **ROLAGE** – Age of clients served.
2. **ROLHRS** – Hours of operation.
3. **ROLRSD** – Geographic area served.
4. **ROLFEE** – Fee structure.
5. **ROLGEN** – Gender served.
6. **ROLTYP** – Type(s) of service provided.

IMA Mental Health - Development Area Option:D11
Electronic rolodex

A

Last name: First:
Address: :
City: State: Zip:
Phone: FAX: Creator: Allowed:
email:
Note:
Service qualifiers: Types:
Fees: Gender: Age: Resid: Hours: Ref?

Enter, show, change, delete, or find? (E.S.C.D.F)
1 men req

List of optional features by which to further identify addressees

Electronic Rolodex in D-11

Ticklers

Ticklers are a unique form of electronic mail that are sent by the system and tracked within the client database. This type of e-mail is a reminder and prompt for an activity to be completed by the recipient with regard to a specific client and data requirement. Ticklers are tracked and reported within the system according to their status: **O**verdue, **C**urrent, **1** month ahead or **2** months ahead.

Set-up

Tables in H-2

TCKTYP – This table defines the tickler type.

MALCAT – This table defines the mail or tickler subjects for the ticklers sent by the system to the responsible party.

Set-up Files in H-12

TCKRPT.DAT – (**H-12 TK**) Control file for calendar controlled ticklers.

TCKRPT.DT2 – (**H-12 TK**) Control file for client record controlled ticklers.

CLTASM.TCK – (**H-12 MS**) Control file for automatic tickler closing if on-line assessments and treatment plans are utilized, creating the completion entry in **A-1 TD** and changing the tickler e-mail status to closed.

Database Definitions

Within program definition in **H-13**, each program is defined by tickler type according to the **TCKTYP** table.

Disposition

Tickler disposition is dependent upon its status within the system. E-mail will be sent to the responsible party at an assigned alert status. Once the activity is completed, it can be closed within the tickler sub-menu for e-mail at **D-1 CT**. Making a completion entry in **CT** will automatically update **A-1 TD**.

- **D-1 DT** is a tickler utility for deleting old tickler messages. This is much like the mail deletion utility and should be run occasionally, as large numbers of old messages will cause the system to slow down.
- Ticklers can be viewed or changed in **A-1 TD**. This record can serve as the trigger for a new tickler.

Tickler Reports

Menu Option D-8

Sophisticated reporting is available for ticklers. Selection criteria is determined for Tickler type code (subject), Recipient, Client (specific or all), Program (specific or all), Dates (report date and tickler creation dates), and Alert status.

Using the Tickler System

- **D-8** Creates the tickler report and sends the automatic e-mail message to the designated recipient/staff responsible by selected tickler subject, client, program and alert level.
- **D-1 CT** Designates that that the task has been completed by the user and therefore closed, deletes the e-mail message and creates an **A-1 TD** entry/log of the same.
- **A-1 TD** Logs ticklers as completed/closed with corresponding dates. These entries can be edited by the user, if necessary, or manually entered if the e-mail system is not utilized.