

User & System Utilities

User Utilities

There are user utilities available in **H-45** by which to manage some individual user interfaces with the system.

H-45 Utilities

The **H-45**-User Utilities sub-menu manages the individual user's snapshot of the system and allows access to copy files into and out of IMA, change individual passwords and reprint previously generated operator reports. Additionally, Quick Messages can be sent and received, group attendance displayed and system changes tracked. The User Utilities include the following:

- **CF** – Copy files from/to IMA system as described in Word Processing Chapter, User's Guide.
- **MH** – Manage MHUPD database to track and document changes in system.
- **PW** – Change your password as described in the Access and Navigation section of this guide.
- **QC** – Check your Quick Messages from other IMA users.
- **QS** – Send a Quick Message to another IMA user.
- **RR** – Reprint Generated Reports – any report previously generated by the user is listed for selection to reprint.
- **GR** – Group Attendance Display selected by client, group, staff and dates.

File Copy

A copy of the file is created and placed in a new location while the original remains in its initial locale. File copy can be done into or out of the IMA system, to or from a floppy disk in the server or PC with any file type. When copying between the server and another device simply specify the file name by using the **<hlp>** utility and indicate the server drive to use. Directions for file copy between a PC and another device will differ based on the emulator type on which the IMA system is running. Different emulators can be specified for use based on terminal name and users. The

data file **EMULS.DAT** will match the first finding of either terminal or user name for which to set up the terminal emulation to use for file copy.

ICETCP & ICETEN

For ICETCP, begin by pressing the **FTP** button on your toolbar and then enter your UNIX password. For ICETEN press the button with the lightening bolt icon. The respective screen below will be displayed. Merely locate the file to transfer, whether it is on the UNIX side or on the PC side by navigating through the directories. This is accomplished by clicking on the directory name on the upper white boxes of the screen and the files available will appear in the lower boxes. Once the file to transfer has been located, find its new desired destination by the same technique. Then click on the arrow button that is in the correct direction for this transfer. When the file has been transferred, exit this screen and return to the IMA system by either pressing <enter> or typing "exit." The new file can be accessed by going to its location outside of the IMA application.

Kermit

Into IMA

Enter the name you want to call the file after it is copied to the UNIX side, or enter a UNIX directory name, and the file will be placed in that directory with its original name.

- Press <enter> for your home directory.
- Enter a file name only (with no directory path) to copy the file into your home directory with a new name.
- Use <hlp> to navigate the UNIX directory structure to find a filename or directory name to use as the new destination.

After sometime the following instructions will appear at the bottom of your screen:

"Return to your local Kermit and give a SEND command.

KERMIT READY TO RECEIVE..."

At this time flip back to the PC side by typing <Alt>+<X> and at the prompt type: "send <filename>". If you are unsure as to the exact location of your file commands such as "cd" (change directory) and "dir" (list files in current directory) may be useful for navigation. When the file transfer is complete, you will be returned to the IMA Menu.

Out of IMA

Enter the name of the UNIX source file you wish to copy, or use <hlp> to navigate the UNIX directory structure to find the file. As the file is being transferred, take note of the File name and the Current path, which are shown on the top three lines of Kermit's display. When the file transfer is complete, you will be returned to the IMA Menu.

The Windows Explorer or File Manager can locate new the file, which will be found in the directory whose name appeared as the Current path during the transfer.

SMARTERM

Into IMA

Enter the name you want to call the file after it is copied to the UNIX side, or enter a UNIX directory name, and the file will be placed in that directory with its original name.

- Press <**enter**> for your home directory.
- Enter a file name only (with no directory path) to copy the file into your home directory with a new name.
- Use <**hlp**> to navigate the UNIX directory structure to find a filename or directory name to use as the new destination.

After sometime the following instructions will appear at the bottom of your screen:

"Return to your local Kermit and give a SEND command.

KERMIT READY TO RECEIVE..."

Then, click Send Files.. from the SmarTerm 420 Transfer menu toolbar. Navigate your Windows directory structure to open the folder containing the source file. This may also be a formatted floppy disk (normally A:). You must enter a file name in the Local File Name box. When the file copy is complete, you will be returned to the IMA Menu. Use your Windows Explorer or File Manager to locate the file.

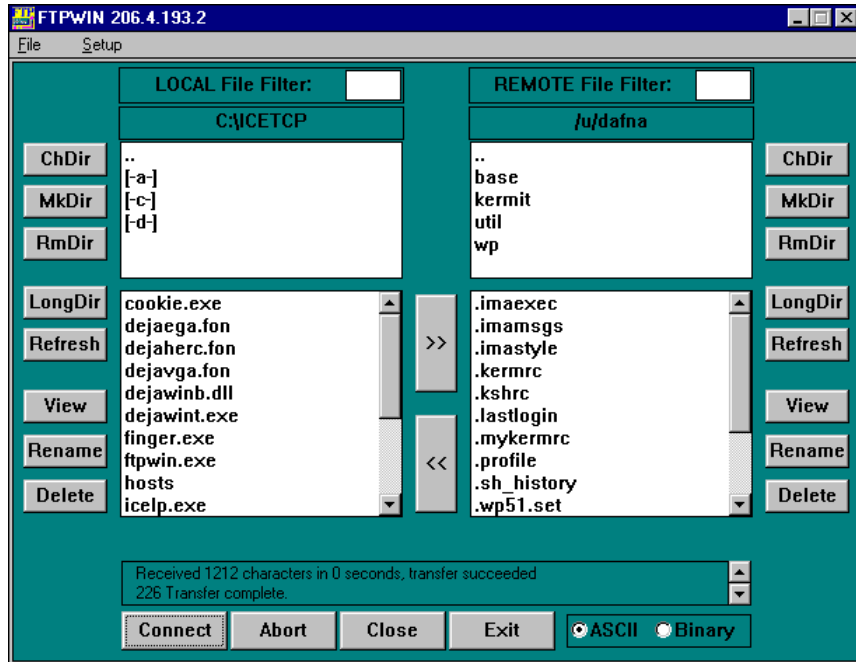
Out of IMA

Enter the name of the UNIX source file to copy, or use <**hlp**> to navigate the UNIX directory structure to find the file. You will see the following instructions at the bottom of your screen:

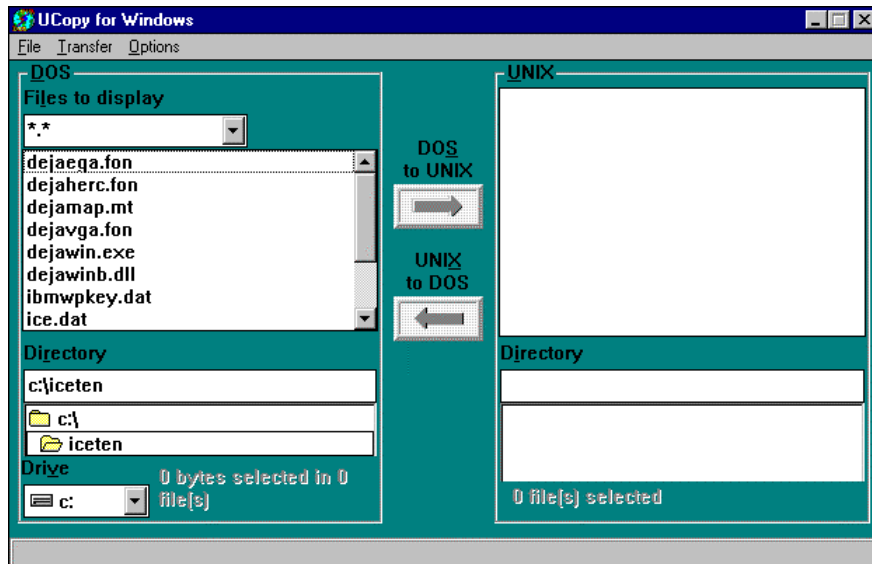
"Return to your local Kermit and give a RECEIVE command.

KERMIT READY TO SEND..."

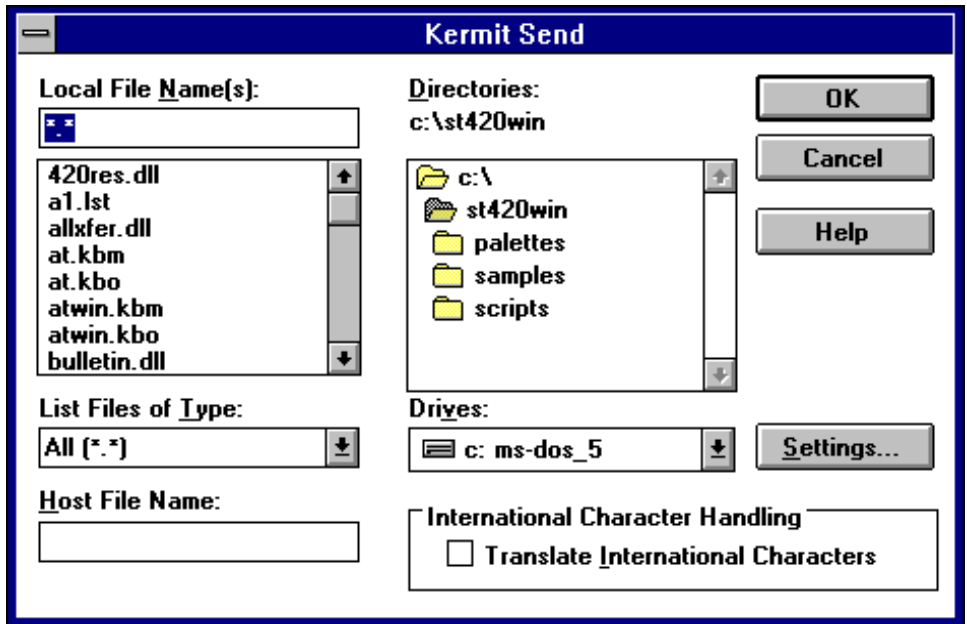
Then click Receive Files.. from the SmarTerm 420 Transfer toolbar. Navigate your Windows directory structure to open the destination folder into which the file will be transferred. This destination may optionally be a formatted floppy disk (normally A:). You must enter a file name in the Local File Name box. The new name can be the same as that of the source file. When the file transfer is complete, you will be returned to the IMA Menu. Use Windows Explorer or File Manager to locate and view the file.



ICETCP File Copy



ICETEN File Copy



SmarTerm File Copy.

System Utilities

The agency system administrator and designated others also have utilities to manage some system and general user interfaces.

H-46 Utilities

```

IMA Mental Health - Development Area Option:H46
System Utilities

AR - A/R Check                DL - Delete access log entries
AC - Archive file             DP - Delete client programs
BC - Backup create            DC - Delete calendar entries
BU - Backup verify
LK - Lock Maintenance
MD - Change Message of the Day
MM - Mail Maintenance
NU - New User
RI - Configure RIO
RP - Report layout generator
SF - Send files to RHIG by ftp
SH - Run System Administration Shel
UU - Version Verification on all pr
WH - Who is on the system now
CL - Set terminal colors
RG - Create Ring remittance floppy
LL - Lookup access log entries

Option:                        2 men

```

The H-46 Sub-menu: System Utilities.

In **H-46**, there are options such as creating backup tapes, clearing system and calendar locks and temporarily exiting to the System Administrator shell, among other options. A description of these system utilities follows:

- **AR** – A/R Check
- **AC** – Archive File

Archive staff activity and billing files or archive client notes files.

- **BC** – Back-up Create.
- **BV** – Back-up Verify.
- **LK** – Lock Maintenance for file and calendar locks.
Manage file and calendar locks.
- **MD** – Change Message of the Day that is run at login.
- **MM** – Mail Maintenance
Would be used only in rare circumstances. Users maintain their own in-boxes and out-boxes within **D-1**.
- **NU** – New User
Utility for adding new users as described in Access and Navigation Chapter of this Guide.
- **RI** – Configure RIO
Requires superuser password.
- **RP** – Report Layout Generator
Automated report generator for Ad Hoc Report layout files as described in the Report Chapter of this Guide.
- **SH** – Run System Administration Shell
Takes user to superuser status with password and allows interaction with system at UNIX/vi level.
- **VV** – Version Verification on all programs – determines current version of all programs being run.

In addition to running this program, within any menu or sub-menu in the system, a set of keystrokes will show the version of the program currently running. On VT terminals the <F19> function key will present the version number. On all other terminals, use the <SHIFT>+<F1> keystroke combination. This information will aid in providing accurate technical support, which is version specific.
- **WH** – Who is on the system now
Displays who is currently on the system.
- **CL** – Set Terminal Colors
Depends on station set-up.
- **RG** – Create Ring Remittance Floppy.
- **LL** – Lookup Access Log Entries
Logs operator access of client data records by client number, date, time and option. This is initialized at the system level for agencies who want this feature.
- **DL** – Delete Access Log Entries
Manages the size of the access log by deleting designated entries. A default number of days can be defined before which access log entries can be deleted.

- **DP** – Delete Client Programs
Delete designated client programs and associated records.
- **DC** – Delete Calendar Entries
Delete associated calendar entries for above deleted client program.

Data Archiving

H-46 AC – Archive File

H-46 AC is a utility for archiving designated records into a file. These records will then be sealed and accessible only through a special selection option for display and/or reporting. The following are the two options in **H-46 AC**:

- **SA** – Archive Staff Activity and Billing Files
- **CN** – Archive Client Notes File

Staff activity records and billing transaction records must be archived together through option **SA**. Client notes can be archived independent of the others through option **CN**.

```

INA Mental Health - Development Area  Option:H46 -AC
Archive data files

SA - Archive the staff activity & billing files
CN - Archive the client notes file

Option:                                     2 men ext

```

H-46 AC Menu

When option **SA** is selected, the operator is given the choice to run the option for '**Log Only?** (Y, N)'. Answering **Yes** will create a log of what the archive would do if initialized and **No** will create the log and complete the archive as defined by the operator in subsequent screens.

Note: It is extremely important to run this option for **Log Only** before Archiving to determine the number and scope of any damaged records. There may be records that can be investigated, corrected and then included in the archive. **Archive** will exclude all damaged records.

```
IMA Mental Health - Development Area Option:H46-AC
Archive data files
Staff activity & billing files

Log only? (Y,N):■
1 men ext req
```

Selection screen for Archive or Log Only

The next screen defines the time period for the records to be archived. Once defined, the system displays a summary of the archive selection criteria and requests confirmation before proceeding.

```
IMA Mental Health - Development Area Option:H46-AC
Archive data files
Staff activity & billing files

Starting activity date:01/01/1997
Ending activity date:12/31/1997

About to copy SAL & BTM records from 01/01/97 thru 12/31/97 to the archive files
OK to continue? (Y,N):
1 men bck req
```

Archive or Log file date definition and confirmation summary

Answer **Y**es to continue with Archive or Log as defined or **N**o to redefine the selection criteria. Once continued, the system will process the records, taking some time, depending upon the date range and number of records involved. Once completed, the screen will display summary data about the Archive or Log and direct the user to the location of the full Archive Log or Log for process details.

```

IMA Mental Health - Development Area Option:H46-AC
Archive data files
Staff activity & billing files

Starting activity date:01/01/1997
Ending activity date:12/31/1997 Processing:SCDSF 2 / 2400

2412 records processed
0 records were archived to ARCSAL
0 records were deleted from STFACT.

Note: You can use H12-MS to review the log file ARCSAL.LOG.

Type <Enter> to return to menu
1 Men ext bck

```

Archive or Log Summary with location of full Archive Log or Log

The Summary includes the number of records processed, the number of records archived and the number of records moved from the designated database. The Log in **H-12 MS** contains detail on those processes.

```

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

File /u/mh_dev/sco/admindata/ARCSAL.LOG
-----
***** LOG ONLY - NO DATA ARCHIVED *****
SAL & BTM archive started on 03/12/99 at 1:28 PM
by GB Georgeanne Biancarosa
SAL archive file /u/mh_dev/sco/archive/ARCSAL was added to.
BTM archive file /u/mh_dev/sco/archive/ was added to.
SAL & BTM records from 01/01/97 thru 12/31/97 archived.
SAL AAAUD 2 points to bill 1 342 which has WRONG date
SAL AAAUD 3 points to bill 1 342 which has WRONG date
SAL AAAUD 4 points to bill 1 342 which has WRONG date
SAL AAAUD 5 points to bill 1 342 which has WRONG date
SAL AAAUD 6 points to bill 1 342 which has WRONG date
SAL AAJSM 9 points to a non existent bill 103 63
SAL AAJSM 17 points to a non existent bill 103 83
SAL AAJSM 19 points to a non existent bill 103 85

120 x 1000 men ext

```

Beginning of Archive (or Log) Log with selection criteria and list of damaged records

```

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

File /u/mh_dev/sco/admindata/ARCSAL.LOG
SAL 9 MS 50 points to bill 3000 113 which has WRONG date
2412 SAL records processed
 0 SAL records archived
 0 SAL records deleted
2089 SAL records not archived
 724 SAL records in date range
 16 SAL records not pointing to a bill
 0 BTM records archived
 0 BTM records deleted
132 BTM records missing!
 27 BTM records that dont match SAL!
 401 BTM records still open
Completed on 03-12-99 at 1:28 PM
***** LOG ONLY - NO DATA ARCHIVED *****
-----

120 x 1000 men ext

```

End of Archive (or Log) Log with continued list of damaged records and Summary of the process and errors

Once the Log issues have been investigated and resolved to satisfaction, the Archive function can be run to separate the designated records from the database.

Viewing and Reporting on Archived Records

System Administration option **H-15** must now be used to access those records for display and reporting. When archive files are selected, all menu options for that operator will be using those designated archive files. As a result, menu options for adding and changing data will no longer be active. This is only in effect until the Menu is reset through **H-15** or until the operator signs off and on again.

```

IMA Mental Health - Development Area Option:H15
Choose archive files

Archive files in current use:
Billing transaction:/u/mh_dev/sco/archive/BTW97
Staff activity:/u/mh_dev/sco/archive/SAL97
Client notes:/u/mh_dev/sco/archive/CWTC97

Reset the menu to access these files? (Y,N):
1 men ext bck req

```

H-15 Menu with Archive files selected and confirmation prompt

```

Version:11.1          The Mental Health Workbench          03-12-99 Fri
Copyright 1997 by ARCHIVE - IMA Mental Health - Developmen  3:22 PM
IMA, Inc.             BILLING                               Option:C
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

Processing:
Lookup & reports (continued):
  C12 - Client statements
  C13 - Aged A/R report
  C14 - Client ledger printing
  C15 - Daily client cash report
  C19 - Billing reports
  C20 - Audit reports
  C25 - Case payment tracking
  C26 - Insurance coverage reports

Utilities:
  C21 - Billing record maintenance
  C22 - Fee schedules
  C23 - Medicaid payment rates
  C24 - Medicare payment rates

Lookup & reports:
  C11 - Client ledger lookup

Option:
          9 men ext hlp

```

C-Menu when Archive files are selected for billing transactions