

Access & Navigation

Overview

This chapter contains information that pertains to the overall usage and utilization of the IMA Workbench. The user needs to be familiar with the items contained in this chapter before proceeding to the rest of the manual. Included in this chapter are definitions of terms used throughout the manual. The topics included are:

- The menu system.
- The display.
- Function keys.
- The editor.
- General rules.

The Menu System

The IMA Workbench is hierarchically structured with menus and sub-menus. The user first chooses the general function area, and then, from a sub-menu, chooses the specific function to be performed.

The first menu of the IMA Workbench is the Main Menu. In order to choose an option, the corresponding letter is typed in at the '**Option:**' prompt. The basic rules for navigation through the IMA Workbench are:

1. Type the desired option from the keyboard and press <**Enter**>.
2. See the Navigation Line for information on the available functions via the function keys at any given field.

The main screen of the IMA Workbench lists the eight menu options with some key words representing their respective sub-menus.

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Version:11.0          The Mental Health Workbench          05-13-97 Tues
Copyright 1997 by    IMA Mental Health - Development Area  3:02 PM
IMA, Inc.            Main Menu
Printer:WT Laser
Dafna Frydman

A - RECEPTION       E - BOOKKEEPING
  Screening, Intake   Purchases, Disbursements
  Appointments, Cash receipts   End of month procedures

B - CLINICIAN      F - ACCOUNTING
  Progress notes, Assessments   General Ledger, Adjustments
  Treatment plans, Referrals     Financial Statements

C - BILLING        G - DATABASE REPORTS
  Medicare, Medicaid, Insurance  Client/Staff/Service
  Reports, Magnetic Media         QA-UR, Ad-hoc, Tickler files

D - OFFICE AUTOMATION  H - SYSTEM ADMINISTRATION
  Electronic mail, Calendar       Access control, Data tables
  Resource Directory, Word processing  System backup

Option:
                                9 men hlp
  
```

The Menu Screen.

The Sub-menus: a description

A – Reception

The functions performed at the reception desk include handling client data and services/visits, receipt of payment, scheduling, client collaterals, pre-registration/intake and face sheets.

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Version:11.1          The Mental Health Workbench          08-10-98 Mon
Copyright 1997 by    IMA Mental Health - Development Area  2:13 PM
IMA, Inc.            RECEPTION                             Option:A
Printer:Downstairs laser(WT)   Georgeanne Biancarosa

A1 - Client data
A2 - Services/visits
A3 - Receipt of payment/individual
A4 - Scheduling
A5 - Collaterals
A6 - Pre-registration
A7 - Front desk
A8 - Client face sheets
A9 - Client lookup
A10 - Client labels
A11 - Residential entitlements
A12 - Barcode scan record

Option:
                                9 men ext hlp
  
```

The A Sub-menu – Reception.

B – Clinician

The functions performed within the Clinician sub-menu options include writing, reviewing, and printing progress notes, maintaining client demographics, medical data and assessments, looking up letters and memos relating to clients and maintaining referrals and treatment plans.

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Version:11.0          The Mental Health Workbench          01-29-98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area  9:05 AM
IMA, Inc.            CLINICIAN                             Option:8
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

      B1 - Write progress note
      B2 - Review progress notes
      B3 - Print progress notes
      B4 - Client data
      B5 - Client Medical data
      B6 - Client assessments
      B7 - Client related letter/MEMO lookup
      B8 - Event log
      B9 - Treatment plans
      B10 - Functional assessment
      B11 - Edit progress notes

Option:

                               9 men ext hlp

```

The B Sub-menu – Clinician.

C – Billing

Billing features options for Processing that includes generating bills, posting receipts of individual payments, Medicaid reconciliation from floppy disk, daily billing consolidation, client balance sweep and write-off, on-account application and self-pay accrual and reports. Another feature is Lookup and Reports for viewing client ledger and statements and generating hard copy reports for aged accounts receivable, billing, daily cash receipts and audit reports. The Utilities feature maintains the billing record, fee schedules and payment rates.

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Version:11.1          The Mental Health Workbench          08-18-98 Mon
Copyright 1997 by    IMA Mental Health - Development Area  2:28 PM
IMA, Inc.            BILLING                               Option:C
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

Processing:
      C1 - Generate bills
      C2 - Receipt of payment/individual
      C3 - Post electronic remittance
      C4 - Daily COT consolidation
      C5 - Client balance sweep
      C6 - Client balance write-off
      C7 - On account application
      C8 - Self pay accrual and report
      C9 - MUTS processing
      C10 - Terminate inactive clients

Lookup & reports:
      C11 - Client ledger lookup
      C12 - Client statements

Lookup & reports (continued):
      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

Option:█

                               9 men ext hlp

```

The C Sub-menu – Billing.

D -- Office Automation

Office Automation puts all office organizer utilities at the fingertips of the user. Features organized under Electronic Mail and Scheduling include sending and receiving electronic mail, scheduling of staff, client group maintenance, printing e-mail and schedules, tickler reports and time cards. Options in Word Processing include creating and maintaining an electronic Rolodex, generating original or editing form letters and free form word processing.

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Version:11.0          The Mental Health Workbench          01-29-98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area  9:25 AM
IMA, Inc.            OFFICE AUTOMATION                    Option:D
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

Electronic Mail & Scheduling:                               Word Processing:
D1 - Electronic mail                                       D11 - Electronic rolodex
D2 - Scheduling                                             D12 - Generate letters
D3 - Client group maintenance                             D13 - Lookup letters
D4 - Print mail                                             D14 - Free form word processing
D5 - Print staff schedules
D6 - Close non-client activities
D8 - Tickler reports
D9 - Time cards
D10 - Enter hours worked

Option:
          9 men ext hlp

```

The D Sub-menu – Office Automation.

E – Bookkeeping

Bookkeeping is an agency operations selection and maintains agency transaction, disbursement and checking features. It can be accessed with administrative permissions only. Bookkeeping procedures are organized around Cash Transactions, Accounts Payable, End of Day Procedures, End of Month Procedures and Miscellaneous Procedures. These include the entry of miscellaneous disbursements and receipts, printing checks, issuing monthly automatic checks; vendor maintenance, invoices and disbursement, void vendor checks, aged schedule of payments, vendor purchase history and end of day and month activities. Miscellaneous procedures include current asset value maintenance, check reconciliation, definition of automatic distributions and automatic checks.

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Version:11.0          The Mental Health Workbench          01-29-98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area  9:37 AM
IMA, Inc.            BOOKKEEPING                          Option:E
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

Cash transactions:                                         End of day procedures:
E1 - Entry of misc. disbursements                         E21 - Reports
E2 - Entry of misc. receipts                               E22 - Cleanup
E3 - Reverse E1 & E2 entries                               E23 - Registry update
E4 - Print checks
E5 - Edit checks prior to printing                         End of month procedures:
E6 - Issue monthly automatic checks                       E31 - Reports
Accounts payable:                                         E32 - Post to G/L & other files
E11 - Vendor maintenance                                  E33 - Preliminary post to G/L
E12 - Entry of vendor invoices
E13 - Disbursement to vendors                             Miscellaneous procedures:
E14 - Void vendor checks                                  E41 - Current asset value maintenance
E15 - Vendor ledger                                       E42 - Check reconciliation
E16 - Aged schedule of payables                           E43 - Define automatic distributions
E17 - Vendor purchase history                             E44 - Define automatic checks

Option:
          9 men ext hlp

```

The E Sub-menu – Bookkeeping.

F – Accounting

The Accounting feature is also an agency operations tool and can be accessed with administrative permissions only. Accounting options include General Ledger, Statements, Lookup and End of Year Procedures. Account maintenance, entry of

adjustments to current or previous period, print balance sheets and income statements, multiple statement consolidation, display balances, list accountant adjustments, display cash journal entries and g/l balances are all available.

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Version:11.0          The Mental Health Workbench          01/29/98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area  9:42 AM
                    IMA, Inc.          ACCOUNTING          Option:F
Printer:Downstairs laser(WT)          Georgeanne Biancarosa

General ledger:          End of year procedures:
F1 - G/L account maintenance          F31 - G/L balances cleanup
F2 - Entry of adj. to current period    F32 - Vendor ledger cleanup
F3 - Entry of adj. to prev. period

Statements:
F11 - Print a trial balance
F12 - Print a balance sheet
F13 - Print an income statement
F14 - Multiple statement consolidation

Lookup:
F21 - Display balances
F22 - List of accountant adjustments
F23 - Display cash journal entries

Option:█
                    9 men ext hlp
  
```

The F Sub-menu – Accounting.

G – Database Reports

The Operations and Decision Support reports include the frequency, CDT client schedule and group attendance, restorative services, case load summary, and staff activity and productivity statistics reports. Regulatory Reports include quality assurance, NYSOMH LS3, OASAS threshold, admission and discharge, monthly PRU service delivery and NYSOMH CFR data. Ad Hoc Reports are available on any of the system’s databases by several sort and selection criteria.

```

Version:11.0          The Mental Health Workbench          01/29/98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area  9:50 AM
                    IMA, Inc.          DATABASE REPORTS      Option:G
Printer:Downstairs laser(WT)          Georgeanne Biancarosa

Operations and decision support:          Regulatory reports (continued):
G3 - Frequency reports                  G19 - OASAS threshold report
G4 - CDT client schedule                G21 - County reports
G5 - CDT group attendance               G22 - OASAS adm./disch. reports
G6 - Restorative services report        G23 - NYSOMH CFR data report
G7 - Periodic summary of services       G25 - Residential LS3-6 report
G13 - Case load summary
G14 - Detail staff activity report      Ad hoc reports for specific databases:
G17 - Weekly staff activity            G1 - Client-Program.Medical.Billing
G30 - Productivity statistics          G11 - Referrals-Client.Program
G31 - Generate residential activities   G12 - Activity-Client.Program.Billing
G16 - Quality assurance reports        G20 - Staff
G18 - Monthly LS3 and OASAS report     G24 - Program definitions

Regulatory reports:
G16 - Quality assurance reports
G18 - Monthly LS3 and OASAS report

Option:█
                    9 men ext hlp
  
```

The G Sub-menu – Database Reports.

H -- System Administration

The system administrator’s functions include code, table, operator and calendar maintenance; creating basic system definitions, set up of printers, dial up access and backup disk creation. This is managed primarily by the system administrator and IMA.

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Version:11.0          The Mental Health Workbench          01-29-98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area  9:54 AM
IMA, Inc.            SYSTEM ADMINISTRATION                Option:H
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

Definitions:
H1 - Code maintenance
H2 - Table maintenance
H3 - Operator maintenance
H4 - Calendar maintenance
H5 - Change check numbers
H7 - Staff members
H8 - Activity codes
H9 - Insurance plans
H10 - Physicians
H11 - Treatment plan MEMOS
H12 - Edit control files
H13 - Program definitions
H14 - Command files
H15 - Choose archive files

Miscellaneous:
H31 - Print menus/help files
H32 - Load laser forms
H33 - Dialup other systems
H34 - Change default printer
H45 - User utilities
H46 - System utilities

Option:
          9 men ext hlp

```

The H Sub-menu – System Administration.

The Display

As seen in the introduction to the menu system, the IMA Workbench employs a uniquely structured and logical set of screens for all data entry. Being aware of the following rules will make access and navigation of the system quick and easy.

Keyboard & Screen

The keyboard is the part of the terminal resembling the typewriter key set. Besides having character keys (letters, numbers and punctuation), the keyboard contains function keys (at the top of the keyboard). Each function key has the letter F followed by a number on its face. On each function key there is a three-character code that has been assigned to it by IMA, corresponding to the function it has been assigned within the system. These codes and the uses of the function keys within the system are described later in this chapter. When a specific character or function key is referred to throughout the text, its name will be enclosed in angle brackets (<>).

The screen is the part of the terminal resembling a television screen. The printing that appears on the screen at any given time is called the display. It consists both of typing that you have done and of characters that the computer has outputted. Each piece of information in the screen display is a field. The computer provides information fills in some fields, and in others, the user must fill in the information. Within the display is a solid white box called the cursor; its position on the screen is the cursor position. This is where the next character typed will appear on the screen.

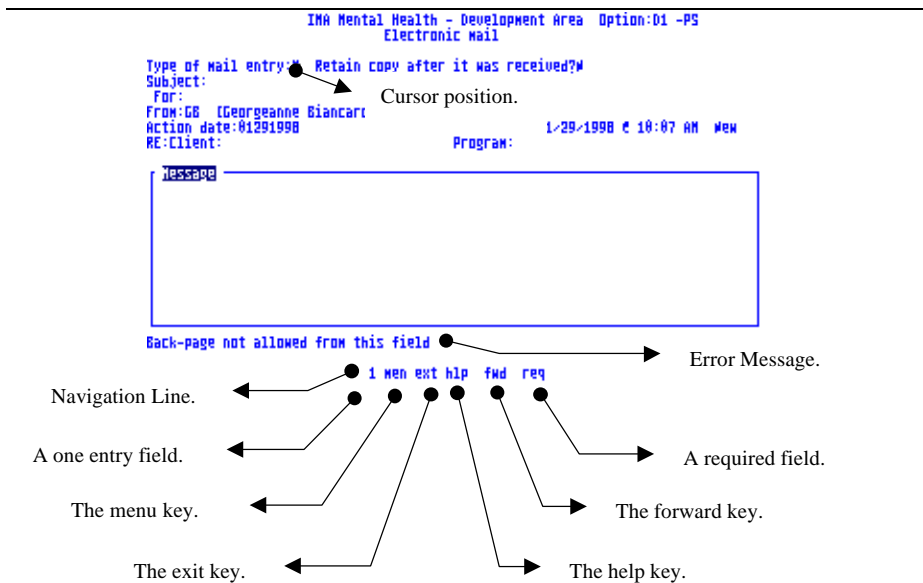
The user can only type on the terminal when the computer has requested information. At other times the terminal is locked and nothing that is typed will appear on the screen. When information is being requested one of the following prompts will appear to the left of the cursor position:

1. A question.
2. A word or phrase requesting information followed by a colon.
3. A sentence identifying the information needed.

The Navigation Line

Whenever information is being requested, the bottom line of the terminal screen will contain a number followed by one or more three-character codes which describe the type of information required at the position where the cursor is currently positioned. The number indicates the maximum amount of characters that may be typed to fill the field. The three-character codes identify the function keys that may be used at that point and whether the data is a required fill for that field. These keys control screen navigation in the IMA Workbench and appear as the top row of the keyboard, identified by <F#> and the corresponding three-character code for its IMA function. Throughout the system these keys are referred to by their functional names. A function key may be used whenever its corresponding code appears on the Navigation Line. If a function key is pressed or activated that is not available within the field, the system will provide an error message that the option is not allowed in that position.

On the Navigation Line, information regarding the user's options based on the cursor position is available. The number leading off tells how many characters may be entered into the field. The other codes represent the active function keys within the field. The final is whether or not the field is required, designated by the code 'req' appearing in the final position on the Navigation Line if an entry is required in that field.



The defined Navigation Line and an Error Message are shown.

Function Keys

As previously mentioned, much of the navigation through the menus is done using function keys at the top of the keyboard. Each key is labeled with a three-character code that describes its function. These function keys do not need to be followed by <enter>. The results of using the function keys are described below.

Function key definitions

- <bck> - Move back to the previous field on the screen. The contents of this field are not changed by use of the <bck> key.
- <fwd> - Advance to the next field on the screen. The contents of this field are not changed by use of the <fwd> key.

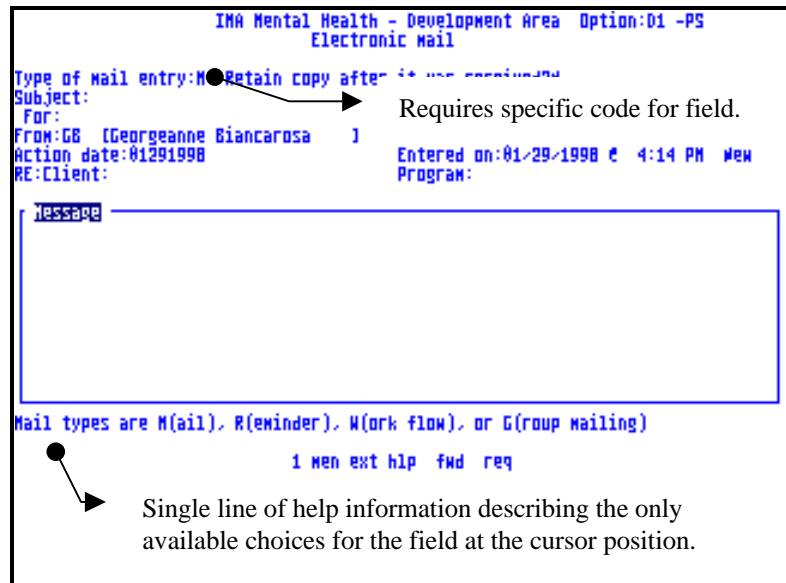
- <men> - Return to the previous menu without finishing the processing of the current option or saving the work done.
- <ext> - Return to the next higher level. If at a sub-menu, return to the main menu. If at a sub-option, return to that option. The current level will not finish its processing before returning to the next higher level, resulting in work not being saved upon exit.
- <scn> - Advance over multiple fields without changing the contents of the skipped fields.
- - Delete this field and possibly associated fields.
- <bpg> - Move back to the previous page without changing the contents of the skipped fields.
- <fpg> - Advance to the next page without changing the contents of the skipped fields.
- <def> - Fill this field with its default value, which is displayed in the field. This can also be accomplished by pressing <enter> at the field.
- <calc> - Invoke the calculator. Operation is described later in this chapter.

Function Keys with Multiple Options

<hlp> - Display any help available. This help can be in a variety of forms. The cursor is not advanced by use of the <hlp> key.

In general, operation of the <hlp> key will provide information regarding the specific data requested at the cursor position. At any given field where <hlp> is available, it will be provided in one of the following four different formats.

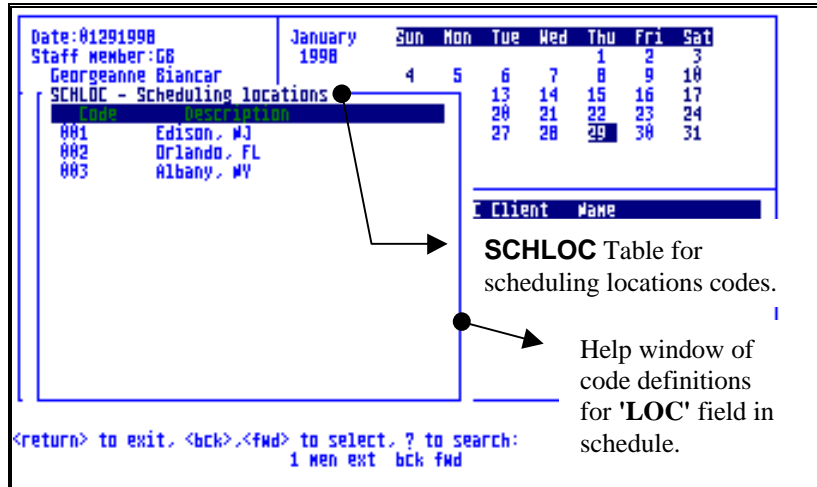
In one instance, one single line of information describing or listing the choices for the prompt at the cursor position is displayed at the bottom of the screen. This will include the only acceptable answers for this field.



A Help message of the given choices/description for the 'Type of mail entry:' prompt.

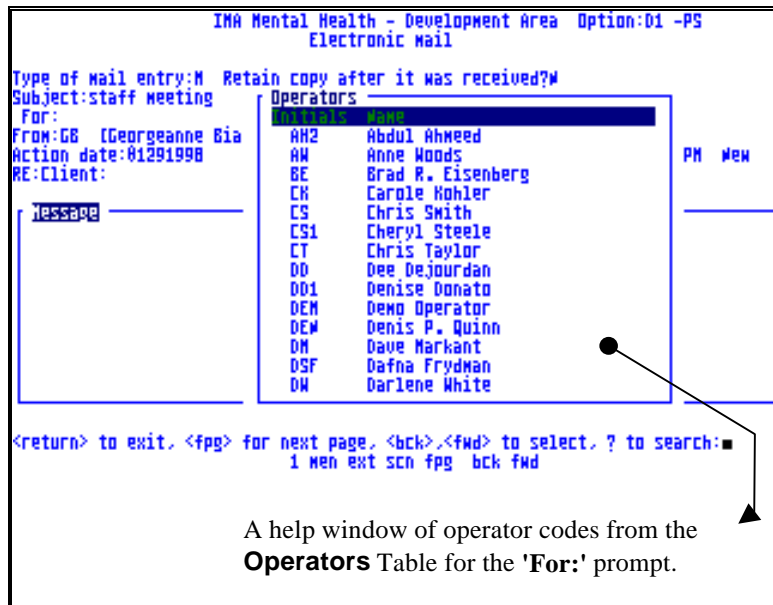
Next, if the field must contain one of several codes, the existing codes will be listed in a window on the terminal screen when the <hlp> key is pressed. The <fwd> and <bck> keys can be used to select the desired code from the window. After the selection is made, the <enter> key is used to exit from the window and return to the field.

The list of valid codes is derived from a defined table wherein the domain of the acceptable codes is defined by the user/agency in menu option **H-2**. The table name is always shown in the top of the help window.



A Help window for selecting the location to schedule from the user defined Scheduling Locations Table.

When there are lengthy screens of <hlp> information, a string search may be initiated by typing <?> and <enter> when prompted to do so. Or, similar to above, the <fwd>, <bck>, <fpg> and <bpq> keys may also be used to make a selection. After the selection is made, the <enter> key is used to exit from the window and return to the field.



A full Help window with a lengthy table of operators from which to choose.

Additionally, the help message may be a slot display or window with a single definition to explain an abbreviation or code in a field that has already been filled with a required code. It may also be a detailed description of what information is being requested.

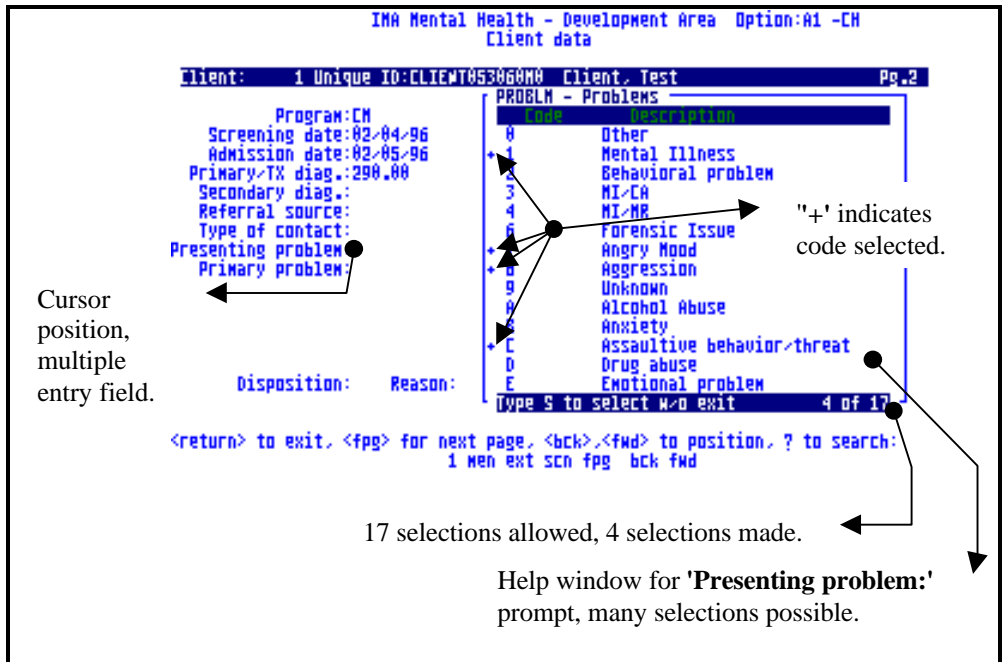
The screenshot shows a terminal window titled "IMA Mental Health - Development Area Option: A1 -CH Client data". The main display shows client information for "Client: 3000 Unique ID: TEST*E030377A0 Pg.1". Fields include Last name: Test, First name: Client, D.O.B.: 03/03/77, Age: 20, Sex: M, SS#: 333333333, Ethnic:, Alias/Maiden:, Client addr: line 1, Municipal: ALB, Catchment area:, Zip: 00000-0000, County: 01, Significant other: 2, Home phone:, Work phone:, Last prov.: 50, Alert status:, Primary lang:, Cultural ident:, Religion:, Marital status:, # children: 0, # at home: 0, Type of education: U, Special training:, Employment status: AA, Veteran status:, Disabled veteran:, Discharge status:, Legal status: 1, Refugee?, SSI-SSDI?, and Capital Dist. Psych. Center. At the bottom, a table of navigation keys is shown: "2 Men ext scn bpg fpg hlp bck fwd del". A help slot display is visible for the "Last prov." field, showing "Specific code selected." and "Capital Dist. Psych. Center".

Specific code selected.

A Help Slot Display defining the specific code entered at the cursor position from the table of the available list of codes for the 'Last prov:' prompt.

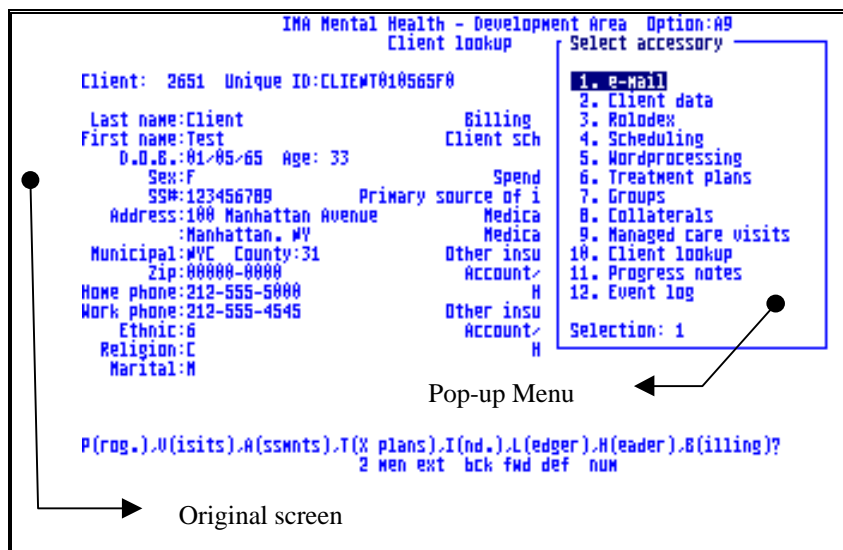
A help slot display defining the selected code from the table defining the field.

Finally, there are some fields that require or allow multiple selections from a table to be entered. Operation within this help window requires the user to make selections by highlighting the desired code, pressing <S> for select and then <enter>. There will be instructions at the bottom of the help window when this multiple selection option is available with regard to selection and exit procedures and number of selections allowed.



A Help Window with the option to select many codes for one field of information.

<Pop> - Display pop up menu of a cross section of frequently used menu option functions These include E-mail, Client Data, Rolodex, Schedules, Word Processing, Treatment Plans, Groups, Collaterals, Managed Care Visits, Client Look-up and Progress Notes. These are accessible at any time without exiting the current system application. The user selects the preferred option using the **<bck>** and **<fwd>** keys, the up and down arrows or by typing in the corresponding number and then pressing **<enter>**. The screens accessed are the same as if they were selected through the ordinary sub-menu system. When activity in the pop-up menu is completed, the user returns to the previous screen from which **<pop>** was entered.



Pop-up Menu within another system screen.

Functions active only in word processing areas.

<Cut> - Copy selection to clipboard.

<Pst> - Paste saved clipboard.

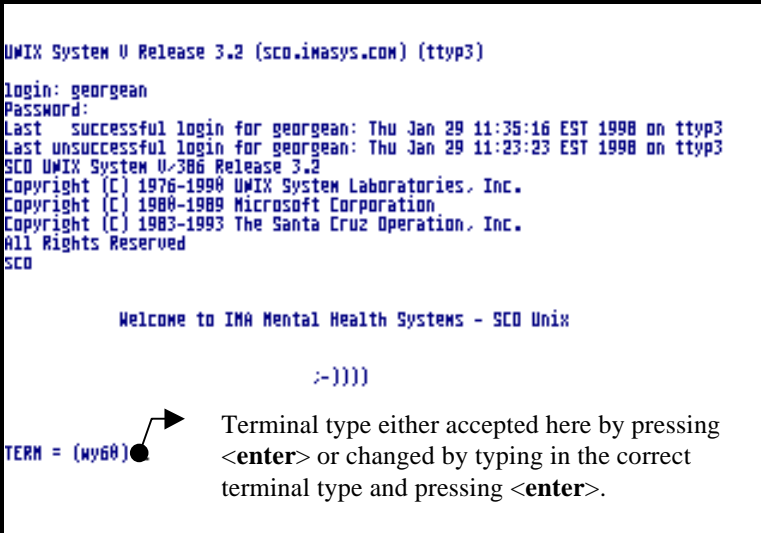
<Esc/Save> - Save memo box or word processing screen.

Function Key and Terminal Set-up

The system needs to know exactly what type of workstation being used in order to correctly interpret the keys and properly manage the screen. This terminal type or workstation, whether it be a WYSE, a VT or a PC, is controlled by the system administrator. The assignment of the F keys, (<F1>, <F2>...), to specific functions, (<bck>, <fwd>...) depends on the type of workstation used. Some of the function keys differ from terminal type to terminal type.

This information is given to the system at the time of login by identifying the terminal type as a WYSE, VT or PC. The terminal type is set up by the system administrator in the user profile where each user is identified by a number of variables, including the terminal type normally used.

As a result, when the user logs on to the system, the terminal type usually used by that operator will be presented. If this is correct, the user presses <enter> and then goes directly to the Main Menu. If the user is at a different terminal type, then the appropriate type must be entered before proceeding to ensure that the setup matches the terminal type and the function keys will operate as expected.



```
UNIX System U Release 3.2 (sco.imasys.com) (tty3)
login: georgean
Password:
Last successful login for georgean: Thu Jan 29 11:35:16 EST 1998 on tty3
Last unsuccessful login for georgean: Thu Jan 29 11:23:23 EST 1998 on tty3
SCO UNIX System U/386 Release 3.2
Copyright (C) 1976-1998 UNIX System Laboratories, Inc.
Copyright (C) 1988-1989 Microsoft Corporation
Copyright (C) 1983-1993 The Santa Cruz Operation, Inc.
All Rights Reserved
sco

Welcome to IMA Mental Health Systems - SCO Unix

:-)))

TERM = (wy60)
```

Terminal type either accepted here by pressing <enter> or changed by typing in the correct terminal type and pressing <enter>.

'TERM' is the prompt to make sure that the system setup matches the terminal type that the user is working on.

If the keys do not appear to function as described above, it is likely that the workstation being used has not been properly defined for the user either at log on or initially by the system administrator in the user profile. In such cases, combination keystrokes may be used to perform the same functions. The following table lists those functions with their corresponding keystroke commands.

Combination Key Strokes for Function Keys

Function	Combination Stroke
bck	down arrow
fwd	up arrow
men	CTRL + B
ext	CTRL + E
scn	CTRL + T
del	CTRL + O
bpg	CTRL + R
fpg	CTRL + X
hlp	CTRL + G
def	CTRL + I

Note: When two keys are combined by a "+", hold down the first while pressing the second.

The Text Editor

The IMA Workbench incorporates one or more editors as part of the overall system. Whenever free form text is entered as an e-mail message, progress note or the name and address in the client record, the text is processed by a program called a **Text Editor**. This text editor is also generally referred to simply as an *editor*. The editor provides functionality that accepts new text from the keyboard as well as methods to easily correct and edit previously entered text.

The specific rules and keystrokes for entering and editing text on your system depends on the unique configuration of your installation, the editor, or combination of editors in use and the area in which the user is navigating the system.

Although there are several editor types, there are only two that the user need be concerned with while working within the Workbench. These are the In-line Editor (or Data Editor) and the Document Editor (or Word Processing Editor). These editors ease the process of entering data and generating letters, documents or any other free form text.

In-line or Data Editor:

- Available in all data entry screens on each line entered by the user and within all word processing formats.
- Basic editing including functions such as: Insert/Delete character, Change and type over existing characters, as well as go to end of line and delete to end of the line.

The In-line Editor is automatically invoked when entering data in a new field. However, when going through a screen with existing data, the user will need to move the cursor to the field in which editing is desired and then press the <home> key. This will activate the editing feature and there will be no need to retype the entire field.

The keystroke combinations that guide these commands are also detailed in the Word Processing Chapter.

The IMA Document Editor:

- Available within all Word Processing areas. These areas are identified by text enclosed in a rectangular box. Whenever the cursor is within one of these boxes, the IMA Document Editor is active.
- In addition to the functions listed above, the following additional functions are also supported.
 - a) Spell Checker.
 - b) Auto Reformatting.
 - c) Expansion Macros.
 - d) Form Navigation.
 - e) Cut and Paste via files in the Clipboard.

The IMA Document Editor is automatically invoked while within the memo boxes and word processing screens. The keystroke combinations that guide these commands are detailed in the Word Processing Chapter.

The WordPerfect Editor:

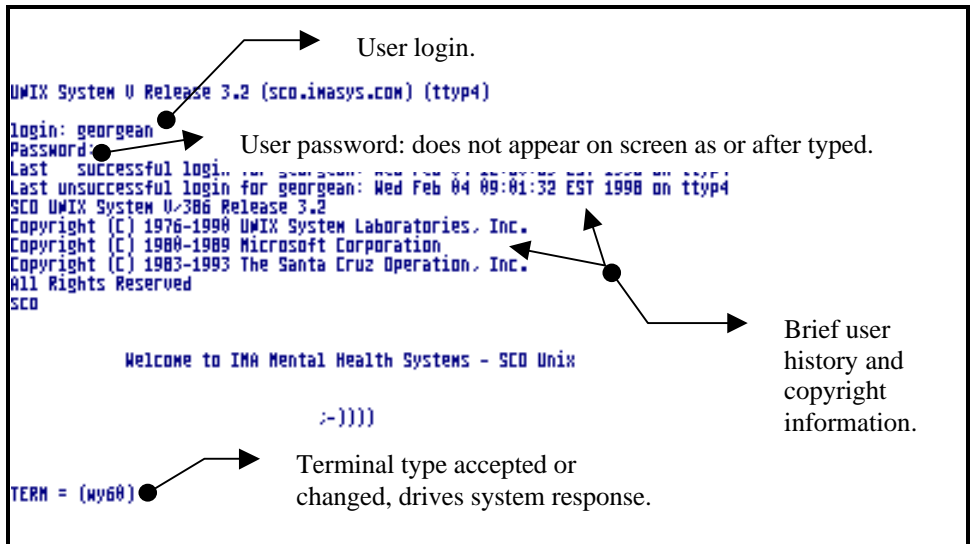
- This is the famous commercial editor that is also available on the UNIX system and could be licensed for your installation.
- Only available within options: generating letters (**D-12**), word processing (**D-14**) and create/edit control files (**H-12**).
- Support is available directly from WordPerfect.
- Ask the system administrator if this is applicable to your installation.

General Rules

Logging on

Before you can begin working in the Workbench, you must first identify yourself. This is known as logging on to the system.

Each user has an operator ID assigned by the system administrator. In most cases the operator ID will be the user's initials. After the operator ID is entered, the system will prompt for the password to be entered. This is a string of characters, also assigned by the system administrator. It is used to verify that the person logging on to the system is authorized to do so. The password will not print on the screen as it is typed, preventing anyone from accidentally seeing it. The password is the key to system security and should not be shared with anyone. After the password has been accepted, the terminal type is either accepted or changed at the prompt based on the type of workstation or terminal that the user is currently operating.



This is the initial screen in which the user logs on with the assigned operator ID, enters the assigned password and determines the accepts/changes the terminal type.

The user may then also have to designate which printer should be used to print any reports that may be generated during this session on the system. When multiple printers are available on the system, the system administrator could set up a user to always print on a specified printer or the system to always ask which printer to use during logon. At the time of printing, a report may also be rerouted to a different printer.

The Main Menu screen then appears for access to the various functions within the system. At this time, the user is free to access the options assigned by the system administrator. These options are based on the permissions granted to each user for different levels of secured information clearance.

Entering Dates

Dates should be entered in **mmddyyyy** or **mmddy** format where **m** represents month, **d** day and **y** year. If less than this is entered, the missing parts of the entered date will default, as described in the following examples, to the current month, year, or century. In all of the following examples, assume that the current date is July 6, 1990 (**07061990**).

- If one or two digits are typed, they are interpreted as the day.
8 is translated to **07081990**.
15 is translated to **07151990**.
- If three or four digits are typed, they are interpreted as the month and day.
208 is translated to **02081990**.
1215 is translated to **12151990**.
- If six digits are typed, they are interpreted as the month, day, and year of the current century.
121584 is translated to **12151984**.

Error Messages

While working at the terminal, error messages informing the user of problems encountered by the system may appear. In most cases, the problem will be in the information just typed, as in typing letters where a number is required or typing a non-existent code when attempting to define a field requiring a specific table to be utilized.

However, incorrect information will not always generate an error message. If a wrong invoice amount is entered, for example, but the number is valid, no error message will be produced.

Upon receiving an error message, first read it to determine the error that has occurred. If it is an error relating to what has been typed; retype the field, taking care not to repeat the mistake. If <hlp> is available, use the <hlp> information as a guide. If you do not understand the error message and nothing can be typed at the terminal, it is probably an error within the system and the system administrator should be contacted.

```
Version:11.0          The Mental Health Workbench          01-29-98 Thurs
Copyright 1997 by    IMA Mental Health - Development Area    11:39 AM
                    IMA, Inc.                                Option:A
Printer:Downstairs laser(MT)                                Georgeanne Biancarosa

A1 - Client data
A2 - Services-visits
A3 - Receipt of payment-individual
A4 - Scheduling
A5 - Collaterals
A6 - Pre-registration
A7 - Front desk
A8 - Client face sheets
A9 - Client lookup
A10 - Client labels
A11 - Residential entitlements

Unknown option:Y
Option:          9 men ext hlp

Error message for unknown
option entered.

Prompt for correct option to be typed.
```

This error message shows that an incorrect or unknown option was entered. The user can determine the correct option and enter it at the prompt.

Security

Operator IDs and passwords are used to provide protection against unauthorized system use. Because of this, it is very important to never disclose your assigned password to anyone. If you do, that person could then use the system by using your operator ID, read your e-mail and perform system functions under your initials.

Each operator has access to only those options and sub-options that the system administrator has determined as necessary for the operator. Attempt to access an unauthorized option or sub-option will result in an error message indicating that the requested option is not allowed for that user.

A logged in screen should never be left unattended. Always log off of the system when leaving the desk or work area and when finished with the system. This too prevents unauthorized access to the functions within the system by users with different permissions or non-users altogether.

Printed Reports

Many of the options and sub-options in the system produce reports on the printer. These reports are described in later chapters.

Before printing, the system will display the name of the printer that will be used. At some point, the user will be told the type of form on which the report is to be printed. Verify that the correct form is mounted in the printer and that it is properly aligned so that the printing will begin at the top of the form. Pressing **<enter>** will then send the report to the designated printer.

```
IMA Mental Health - Development Area Option:A2 -WA
Services-visits

Printer Downstairs laser(WT) selected for printing
Printer assigned to user.
Paper type to be mounted.
Mount regular paper in the printer
Type <return> when mounted
1 men ext bck
```

Print screen showing printer assigned and requesting paper type for mounting.

The **<bck>** key will show a list of printers that this report can be rerouted to. The user can choose any printer from the list or **<0>** to preview the report on the screen.

```
IMA Mental Health - Development Area Option:A2 -WA
Services-visits

Select a printer for regular paper
1 - Downstairs laser(WT)
2 - Upstairs laser
3 - Parallel Laser
4 - Serial Laser
5 - Dummy Laser
6 - Direct Laser

Printer to use (0 = terminal):
Mount regular paper in the printer
Type <return> when mounted
2 men ext num req
```

Screen presented after **<bck>** selected to change printer for this print job.

Calculator

The system includes a built-in calculator which can be accessed from any screen or field by pressing the <calc> function key, for those user's who have an <F13> function key. There are four basic functions as well as a memory. These are addition, subtraction, multiplication and division.

Mathematical equations are typed into the calculator in the same manner as they would be written. The display consists of either the number being typed or the current total and the operation to be performed next.

When the memory contains a number, the display will include the letter **M** to the right of the next operation to be performed. Storing zero in memory clears the memory. Anything typed that the calculator does not understand will be ignored.

The commands for the calculator are:

Addition	<+> or <enter>
Subtraction	<->
Multiplication	<*> or <X>
Division	</>
store last total in memory	<M>
recall number from memory	<R>
erase last character typed	
clear input; total and memory are unaffected	<I>
clear input and total; memory is unaffected	<C>
exit calculator; total is discarded	<esc>
exit calculator; total is placed in input field	<tab>

Logging Off

It is necessary for an operator to log off of the system before leaving or shutting down the computer. This is done by returning to the Main Menu and selecting <men> again. This will log the operator off of the system. Contact the system administrator if this is not the case.