

# E-mail

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## Overview

This section will describe use of the e-mail system that is included in the IMA Workbench. The mail feature allows any user to communicate with any other user on the system. Mail can also be sent to any Internet mail address. The e-mail program can be accessed through menu option **D-1** or with the <Pop> function key.

The **D-1** menu screen is organized into four sections:

1. **Outgoing mail** - functions for posting new messages, reading or editing sent mail which has been saved or has not yet been read by the recipient.
2. **Incoming mail** - read new mail, browse through, read or edit messages that have not been deleted. When new mail arrives, a New Mail Message appears over the Incoming Mail menu option.
3. **Utilities** - mail utilities for defining staff mail groups, batch deleting old mail, managing Internet mail and tracking the contents of the user's inbox and outbox.
4. **Ticklers** - track received tickler messages for pending client tasks.

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

Outgoing Mail:                                You have new mail and/or ticklers
PS - post a new message                        Incoming Mail:
WR - read/edit mail NOT read yet              ME - read new mail
SE - read/edit sent messages                  RR - read/edit old mail

Utilities:                                     Ticklers:
AG - add/change staff groups                  NU - Move to another staff member
DG - delete staff groups                     CT - close ticklers
DE - batch delete of old mail                 DT - delete ticklers
RT - retransmit remote mail
XF - transmit a file
HT - move transmitted files
FS - file statistics

Option: ■                                     2 men
```

The E-mail menu screen.

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# Outgoing Mail

Option **PS** is used to create a new mail message. This is where the sender types the message to be sent. This is also the exact screen that the recipient will see when receiving the mail message. The top half of the screen contains the data fields that describe the attached mail message such as the message type, subject, recipient, sender and action date. Optional fields are also included to make the message client and/or program specific. Additionally, a word processing file can be designated to be attached to Internet mail. The bottom half of the screen contains the word processing memo box where the mail message is typed and displayed.

## **PS: Posting a message**

1. **Type of Mail** -- This can be either **M** for regular mail addressed to another recipient, **R** for a reminder addressed to one's self, **W** for workflow, or **G** for mail sent to a group of staff people.

**Reminder Mail** – is a self-addressed mail posting to remind the user of an important meeting, task or other user defined necessity. It can be current day or posted for future receipt.

**Workflow Documents** – Instead of a blank memo box, the system administrator can create forms for submission to different departments for different purposes, such as: vacation requests or meeting notifications. These forms are created and maintained in the **H** Sub-menu and can be accessed by the user when choosing **W** type mail. The choice of documents will then be displayed in a help window at the '**Subject:**' prompt. This type of mail is different from other types, as it is a form to fill out within the e-mail memo box and it becomes a permanent record of a personnel activity within the system.

**Group Mail** - Mail can be sent to a predefined group of recipients by choosing **G** type of mail. The choice of distribution groups is then available at the '**For:**' prompt in a help window. Individuals can be added or deleted from the group at the time that the message is posted without permanently changing the group.

2. **Retain a copy** - This can be either a **Yes** or **No** answer. The default answer is **No**. Answering **Yes** will make the message available in **SE** to read or edit later. All sent messages will be available for reading and editing in **NR** until the recipient reads it.
3. **Subject** - a one line message for identification. This is not a required field but useful when using mail utilities to select mail items to read, edit or delete.
4. **For** - The code of the recipient is entered. The <hlp> key can be used to rotate through the operator IDs or the Rolodex for Internet mail. When using Internet mail, the address of the remote recipient is entered as follows: userID@system.com. "UserID" is the code of the recipient and "system" is the system name of the other site. For example, to send mail to Mike at IMA, the address would be "mike@imasys.com". If the Rolodex is used to find the recipient name, the e-mail address from the Rolodex will be automatically entered at the '**For:**' prompt when the name is selected.

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**Note:** Ability to send remote/Internet mail is an option that must be assigned by the system administrator. However, all users are able to receive remote/Internet mail.

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5. **Action date** - This is the day that the message will be sent. The user can create mail today which will be delivered immediately or at a future date. The current day's date is the default for this field and can be accepted by pressing <enter>.

The following fields are optional. To skip over these optional fields and go directly to the memo box, the <scn> key may be pressed at the 'RE:' prompt. The cursor will then go directly to the memo box and free form word processing for an e-mail message may be begun.

6. **RE: Client** - This is an optional field. It allows the correspondence to reference a client from the client database. This is typically used for ticklers.
7. **Program** - This also is an optional field used typically for the tickler system.
8. **File to attach** - This is an optional field for Internet/remote mail and can be left blank. A file can be attached to send with the message. <Hlp> will show a list of files in the user's home directory that may be used or attached.

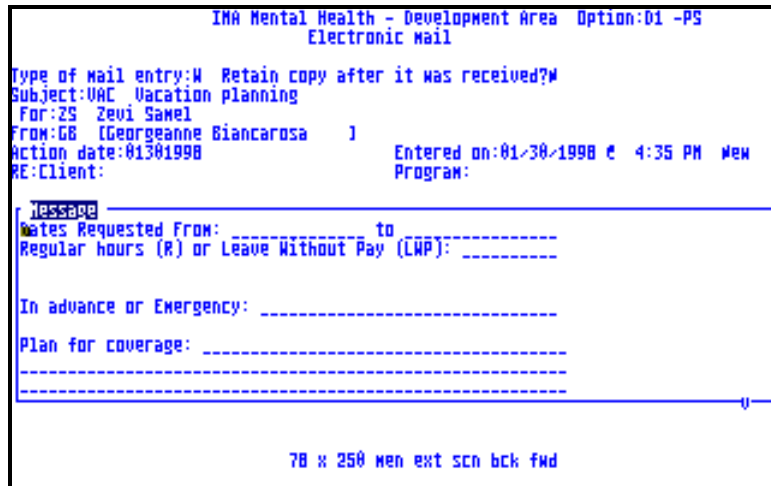
After entering the required data, the cursor moves into the memo box where a free form message can be entered. The IMA Document Editor features are available while in the e-mail memo box. When finished, use the <Esc> key to save the message and leave the memo box. After mail is created, it exists within the system and can be tracked by the creator according to its status.

Each user has both an Outbox and an Inbox. The Outbox is where sent items are stored, while received mail is kept in the Inbox. A mail message cycles through four statuses; New, Read, Closed, or Deleted. All e-mail messages will be marked as any one of the statuses in both the Outbox and Inbox depending on its cycle of life within the system.

```
IMA Mental Health - Development Area Option:01 -PS
Electronic Mail
Type of mail entry:M Retain a copy of this mail?M Record 39334
Subject:PC Expo
For:DSF Dafna Frydman
From:GB [Georgeanne Biancarosa ]
Action date:01271998 Entered on:01/27/1998 @ 12:50 PM MEM
RE:Client: Program:
Message
Are you planning to attend the PC Expo at Javitz Center?

Send this mail to another recipient? (Y,N)M Print this message? (Y,N)M
1 men ext bck fwd def req
```

*A sample E-Mail message.*

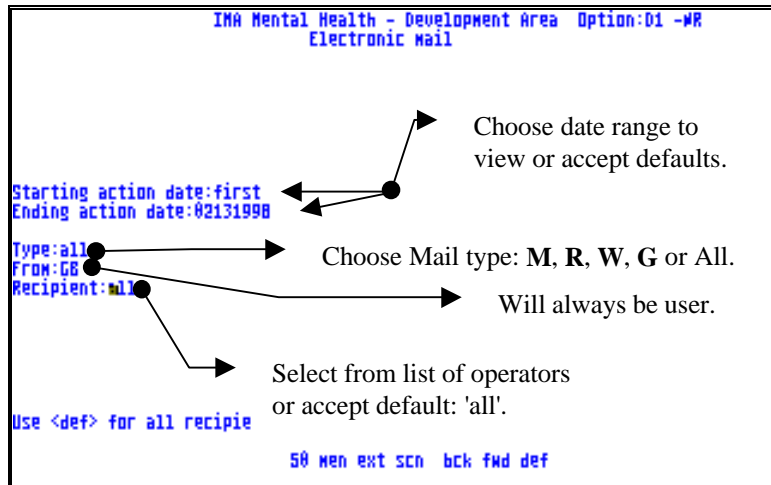


A sample Workflow mail document.

### Read/Edit Mail Not Read Yet: NR

Option **NR** offers a specific search on mail messages sent by the user that have not yet been read by the recipient. In the cases where a large number of these mail messages exist, a filter can be utilized to select which items should be shown. These messages can be filtered by date range, type and recipient, as shown below.

This feature is only available for mail sent to users within the IMA system and not for remote/Internet mail. These are the messages that still have a status of **New** within the system. Once indexed according to the filter criteria, these messages can then be selected for display by using the up and down arrows or <bck> and <fwd> keys and pressing <enter> on the desired highlighted selection.



The screen for selection criteria in D-1 NR.

```

IMA Mental Health - Development Area Option:D1 -WR
Electronic Mail

```

For	Action	Type-Status	Subject	Sequence
Brad R. Eisenberg	02-13-98	M New	new features	39394
Mike Samel	02-13-98	M New	documenting E-Mail Change	39395
Georgianne Biancaros	02-13-98	R New	documentation due	39396
Brad R. Eisenberg	02-13-98	M New	site training	39398
Mike Samel	02-13-98	M New	New E-Mail Documentation	39399
Zevi Samel	02-13-98	M New	New E-Mail Documentation	39400
Denis P. Quinn	02-13-98	M New	New E-Mail Documentation	39402

• Subject by sender.  
 • Type/Status by recipient.  
 • Action date by user.  
 • For: Recipient.

```

<ret> - display, <back> - search
1 Men Ext bck fwd

```

The index of all e-mail messages not yet read by the recipient. This list includes even those that the user did not mark to save in post a new message.

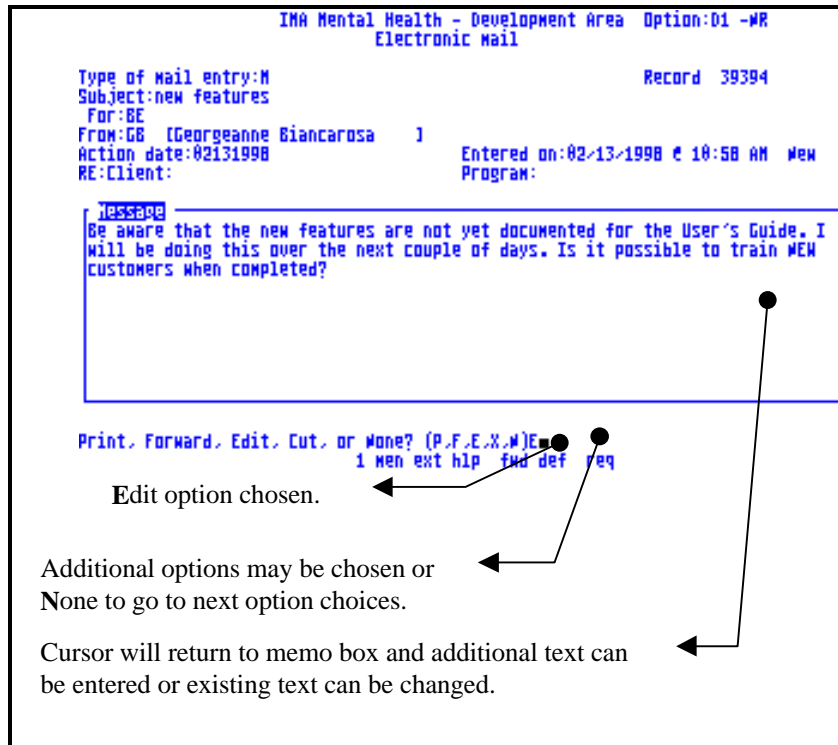
Once a message is selected for display, several options are available:

1. **Print** - The message will be printed on a printer.
2. **Forward** - This option is used to forward the mail to a different recipient. The same message is copied and can be addressed to a new recipient. Additional comments can also be added to the text of the message.
3. **Edit** - This allows the recipient to add some text to the body of the message.
4. **Cut (X)** - This allows the recipient to cut the message to the clipboard. Use **<F-9>** to name it for the user's private clipboard library.
5. **None** - No action.

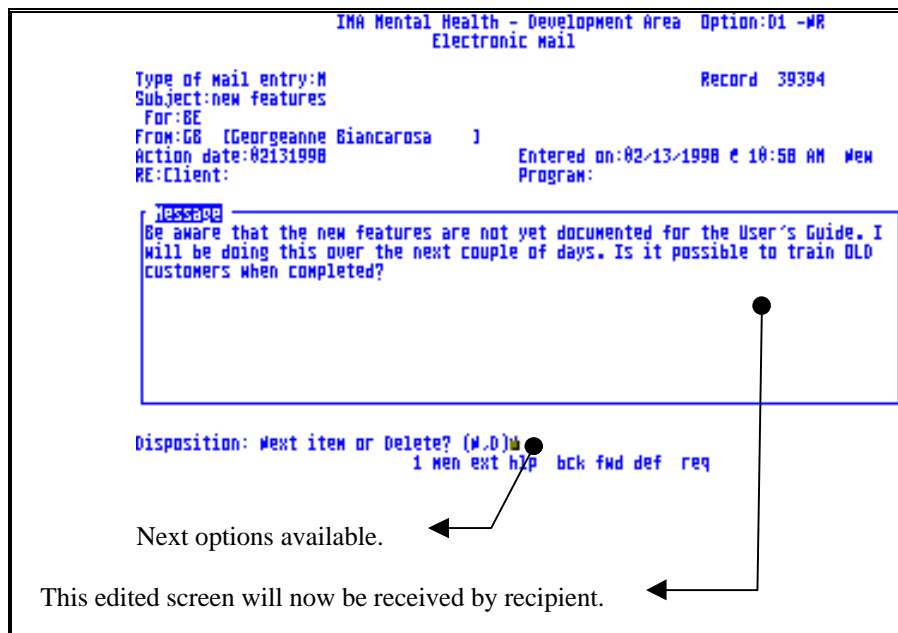
Type the corresponding code and press **<enter>**. Several options or None may be chosen. When finished, select None and press **<enter>**. The following options will then be presented:

1. **Next item**: will display the next item in the index.
2. **Delete**: will delete the item from the recipient's inbox and the recipient will not have access to it. It will also be marked for deletion until the delete utility can be run in mail utilities.

Choose the corresponding code and press **<enter>**.



The first options in the display of an e-mail message not read in NR.



The next and final options in a selected e-mail message in NR.

### Read/Edit Sent Messages: SE

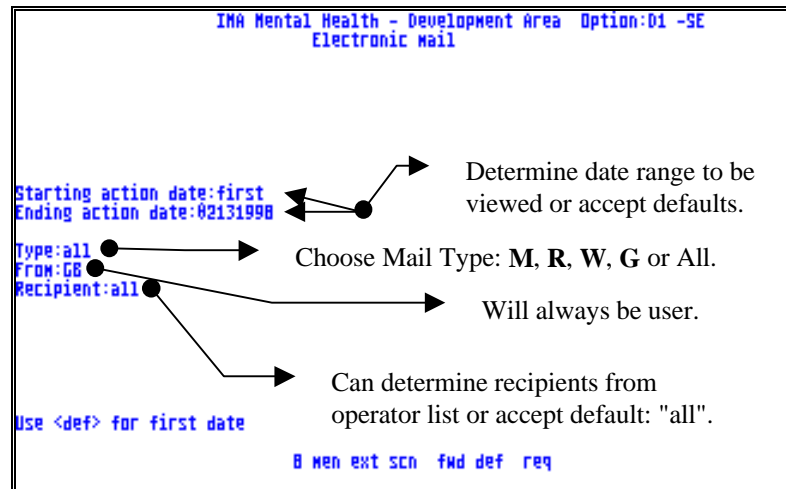
**SE** is the option to view the items in the Outbox. A search can be done to find messages in a specific time period, of a certain type or for a specific recipient. An index to the messages found with the selected filters is listed. The individual messages can then be

displayed, printed, or deleted from the index screen. To display a message, select one from the list by using the up and down arrows or the <fwd> and <bck> keys and then press <enter> when the desired message is highlighted. To **Print** or **Delete** from the index, type the corresponding code and press <enter>.

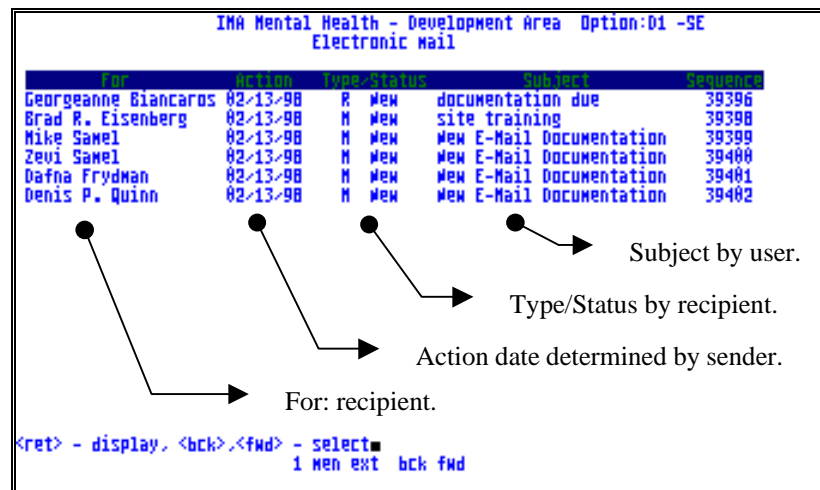
---

**Note:** To be retained for view in the Outbox at **SE**, the user must answer **Yes** to the '**Retain a copy:**' prompt while posting a new message. However, all sent mail messages can be viewed, edited or deleted in option **NR** until read by the recipient.

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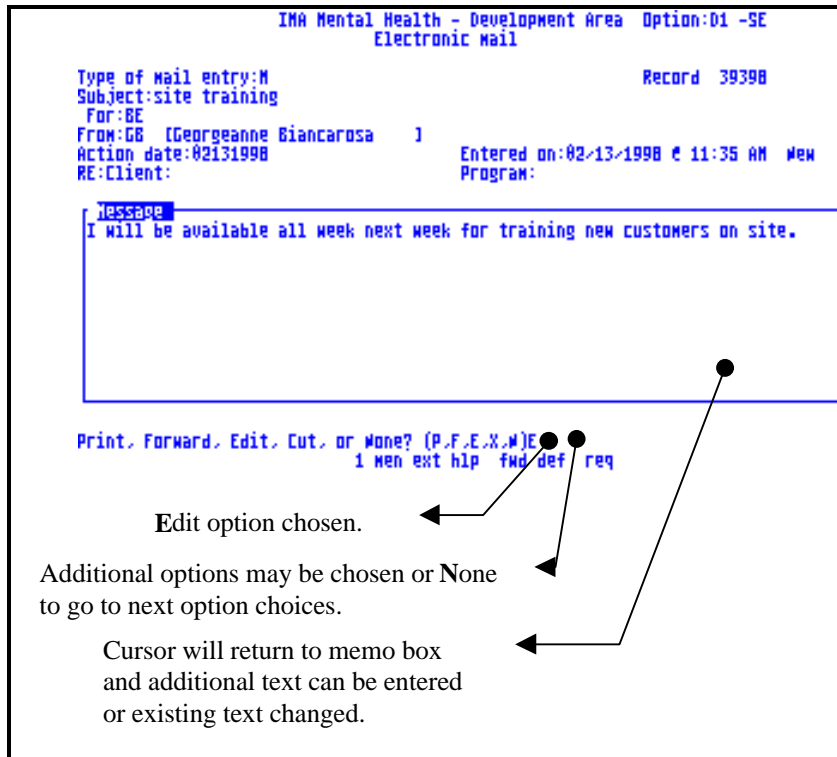


The screen for selection criteria in D-1 SE.

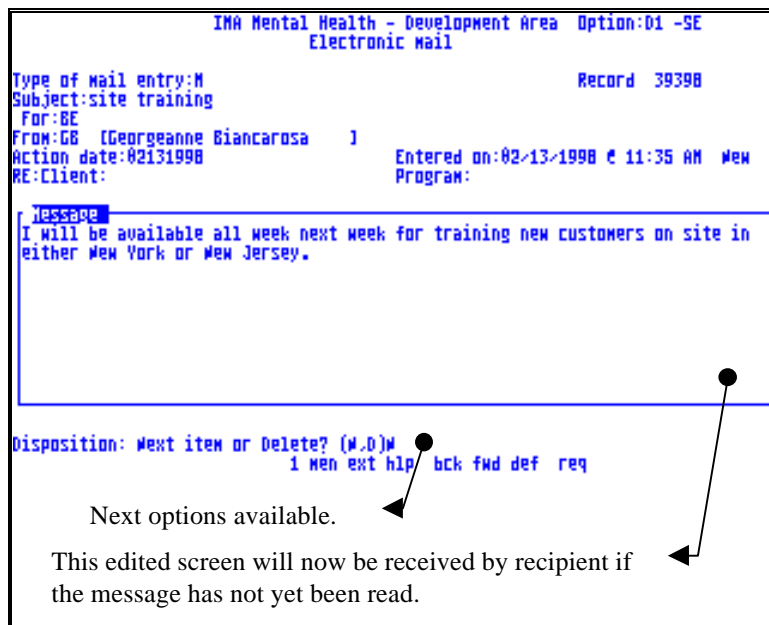


The Index of all e-mail messages saved for reading and editing in D-1 SE.

Once a message is selected for display, a few options are available: **Print Forward**, **Edit Cut (X)** or **None**. To choose an option, type the corresponding code and press <enter>. Several options or **None** may be chosen. When finished, select **None** and press <enter>. The following options will then be presented: **Next item** or **Delete**. Choose the corresponding code and press <enter>. Selecting **Next item** will display the next item in the index. Selecting **Delete** will mark the item for deletion until the recipient also marks the message for deletion and the delete utility can be run in mail utilities.



The first options in the display of a selected e-mail message in SE.

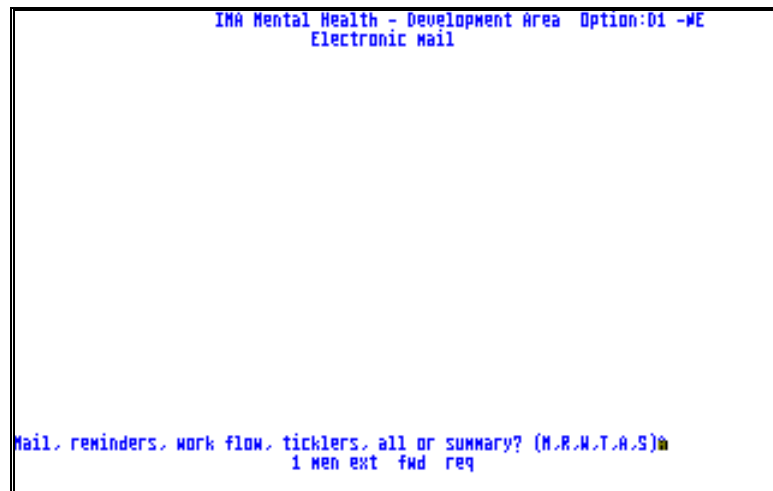


The next and final options for a selected e-mail message in SE.

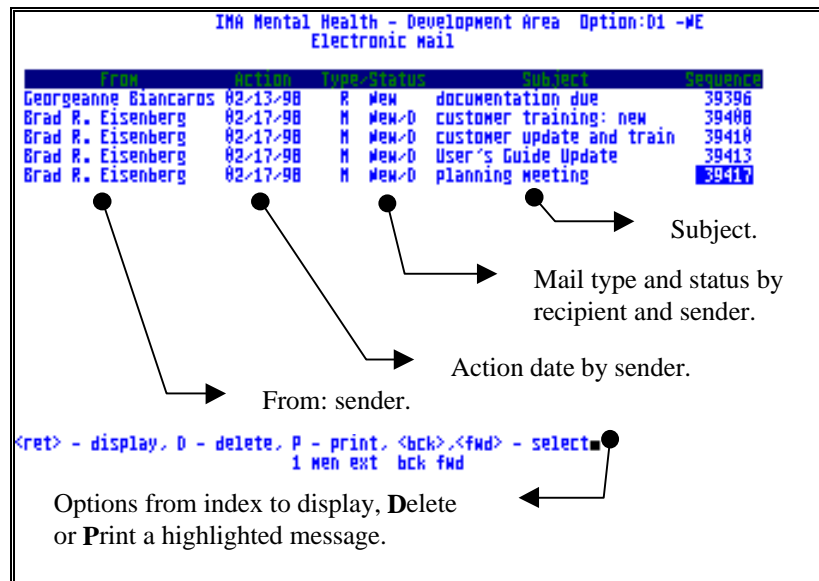
# Incoming Mail

## Read New Mail: NE

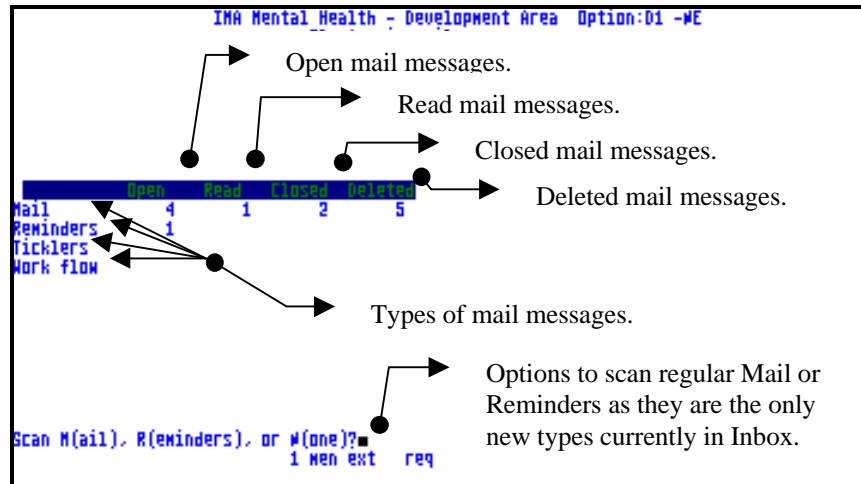
Whenever a new mail message arrives, the user is notified when signing on to the system and with a special message within the menu above the Incoming Mail section. Read the new mail message(s) by selecting option **NE**. The first screen allows the user to determine what type of mail should be indexed for selection: **Mail**, **Reminders**, **Work-Flow**, **Ticklers**, **All** or **Summary**. Type in the corresponding code and press <enter> to make a selection. Entering **Mail**, **Reminders**, **Work-flow** and **Ticklers** will index only the new messages of the selected type. Choosing **All** will display an index of all new mail messages and **Summary** will display a cross section of the new mail by type and status. The user can then choose to scan an option that has mail by typing the corresponding code and pressing <enter> or **None**.



The initial selection screen in D-1 NE.



The index of all new mail in D-1 NE.



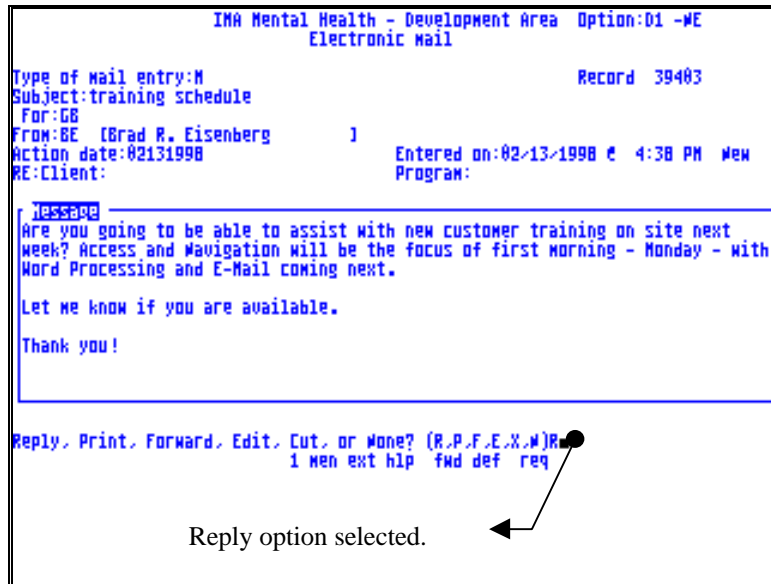
*The Summary cross section of new mail messages in D-1 NE.*

The choice is then given to display the new messages in the index. The user first selects a message by using the up and down arrows or the <bck> and <fwd> keys to highlight the desired selection. Pressing <enter> will display the mail message. The message can also be Deleted or Printed from the index by typing the corresponding code and pressing <enter> without first having to go to the message display.

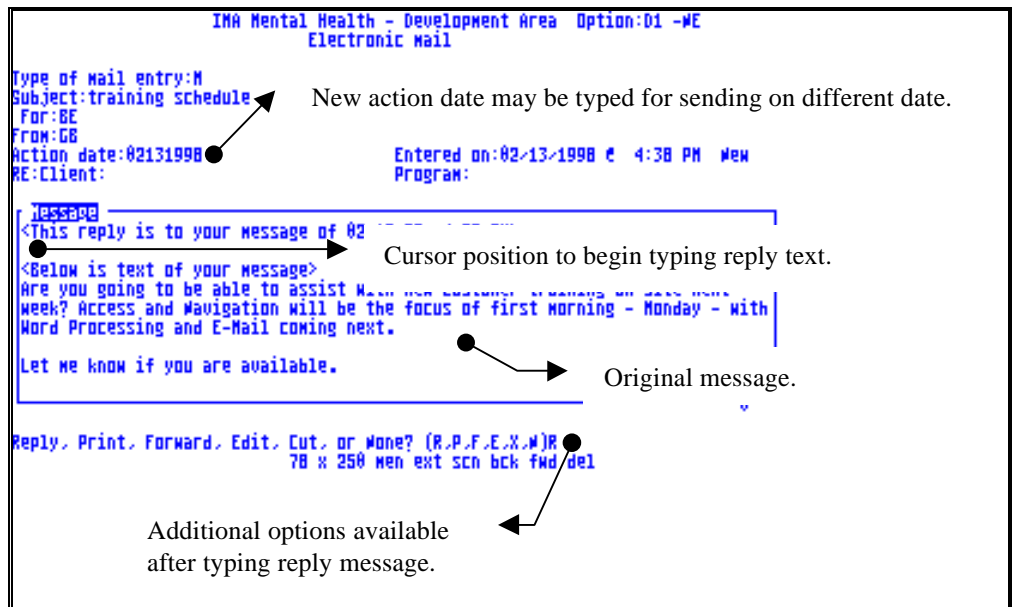
Within the display of each message, there are a number of options available. First, the system allows the recipient to scroll through the message to see any additional sections that did not fit on the initial screen. After this is done, the <Esc> key is used to leave the memo box.

After reading the message, the following options are available:

1. **Reply** - A message is automatically addressed back to the sender. It will also include a copy of the original message as a point of reference for the reply.
2. **Print** - The message will be printed on a printer.
3. **Forward** - This option is used to forward the mail to a different recipient. The same message is copied and can be addressed to a new recipient. Additional comments can also be added to the text of the message.
4. **Edit** - This allows the recipient to add some text to the body of the message.
5. **Cut (X)** - This allows the recipient to cut the message to the clipboard. Use <F-9> to name it for the user's private clipboard library.
6. **None** - No action.



The selected new mail from the index in D-1 NE, showing the first available options.



The Reply mail message screen in D-1 NE.

These choices are repeated to allow more than one of them to be chosen. After finishing with one or more of these functions, choose **N**one to move to the next option. These choices deal with the disposition of the mail message. The recipient can go to the **N**ext message leaving this one as is or **C**lose, **D**elete or **M**ark read. If a message is to be saved indefinitely, it should be marked read. If it is only necessary to keep the message for a limited amount of time, it can be closed.

```

                IMA Mental Health - Development Area  Option:D1 -WE
                Electronic Mail

Type of mail entry:M                               Record 39391
Subject:training schedule
For:GB
From:BE (Brad R. Eisenberg      ]
Action date:02131998             Entered on:02-13-1998 @ 10:46 AM  Wew
RE:Client:                        Program:

[ MESSAGE ]
Are you going to be able to assist with new customer training on site next
week? Access and Navigation will be focus of first morning - Monday - With
Word Processing and E-Mail be next.

Let me know if you are available.

Thank you!

Disposition: Next item, Close, Delete, or Mark as read? (M,C,D,M)
                1 Men ext hlp bck fwd def req

```

The same new mail message with the second list of available options.

### Reread Opened Mail: RR

The recipient can review all received mail that is marked as either **M**arked as read or **C**losed. This is done by selecting **RR** in the Incoming Mail section of the E-Mail menu. The user can then select mail to review based on dates, type and sender.

```

                IMA Mental Health - Development Area  Option:D1 -RR
                Electronic Mail

Starting action date:first
Ending action date:02161998
Type:all
From:all
Recipient:GB
Use <def> for first date

                8 Men ext scn fwd def req

```

Dates to choose or accept defaults.

Choose Mail Type: **M**, **R**, **W**, **G** or All.

Can determine sender from operator list or accept default: "all".

Will always be user.

The selection criteria screen for D-1 RR.

After selection criteria is established and entered, mail will be indexed for selection. Mail can then be selected from the index by using the up and down arrows or **<bck>** and **<fwd>** keys and pressing **<enter>** when the desired selection is highlighted.

```

IMA Mental Health - Development Area Option:01 -RR
Electronic Mail

```

From	Action	Type-Status	Subject	Sequence
Brad R. Eisenberg	02/13/98	M Clsd-D	training schedule	39391
Brad R. Eisenberg	02/13/98	M Clsd-D	lunch meeting	39397
Brad R. Eisenberg	02/13/98	M Read-D	training schedule	39403

```

<ret> - display, <bck>, <fwd> - select
1 men ext bck fwd

```

The index of mail items available to review in D-1 RR.

These messages are similar to new messages in that the same options apply. A **R**eplay can be made to the sender, or the message can be **P**rinted, **F**orwarded, **E**ditd or cut (**X**) or **N**one of the options can be selected and the user moves on to the next option list. The second option list includes: Next item, **C**lose, **D**elete, or **M**ark as read.

```

IMA Mental Health - Development Area Option:01 -RR
Electronic Mail

```

```

Type of mail entry:M                               Record 39397
Subject:lunch meeting
For:GB
From:BE [Brad R. Eisenberg ]
Action date:02/13/1998                               Entered on:02/13/1998 @ 11:24 AM Closed
RE:Client:                                           Program:

```

```

Message
We can meet on documentation issues over lunch. Let's try 1:00pm.

```

```

Reply, Print, Forward, Edit, Cut, or None? (R,P,F,E,X,N)
1 men ext hlp fwd def req

```

A message in D-1 RR with the first list of available options.

```
IMA Mental Health - Development Area Option:01 -RR
Electronic Mail
Type of mail entry:M Record 39397
Subject:lunch meeting
For:GB
From:BE (Brad R. Eisenberg )
Action date:02/13/1998 Entered on:02/13/1998 @ 11:24 AM Closed
RE:Client: Program:

[ MESSAGE ]
We can meet on documentation issues over lunch. Let's try 1:00pm.

Disposition: Next item, Close, Delete, or Mark as read? (M,C,D,R)D
1 men ext hlp bck fwd def req
```

*The same message in D-1 RR with the second list of available options.*

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## Utilities

These options are available in the Utilities portion of the Electronic Mail Sub-menu.

- **AG - Add/change staff groups**

Maintains distribution groups for mail messages.

- **DG - Delete staff groups**

Entire groups can be deleted.

- **DE - Batch delete of old mail.**

Messages are indexed by dates, type and place (Inbox, Outbox or Both) and deleted at one time by selection criteria.

- **RT - Retransmit remote mail.**

Remote/Internet mail can be retransmitted to the original recipient or another.

- **XF - Transmit a file.**

Transmit a file through remote/Internet mail.

- **MT - Move transmitted files.**

Manages files that have been transmitted to the user through remote/Internet mail.

- **FS - File statistics.**

The summary index of all mail messages not yet deleted by type and status can be viewed. This serves as a reminder that file deletion is a necessary part of the mail life cycle within the system.

# Maintaining Mail Groups

## Adding a staff group: AG

Staff members can be grouped together for purposes of mail distribution. These groups are also used elsewhere in the system for certain reports that can be run on groups of staff members. Distribution groups are created and maintained in option **AG**. After choosing this option, the system asks for the code of the group to be created or modified. The **<hlp>** key will display all existing groups and their descriptions. After entering this code or creating a new one, the group screen is displayed. Each group is assigned a description and designated as **Allowed** or **Private**. This determines whether users other than the creator of the group can use this distribution group. The final piece of information needed is the operator code of each user in the group, which is typed in one by one. Deleting is done using the **<del>** key.

Group	Description	Entered on	Allowed users	Area
A	Inpatient group	02/06/1994	A	MS
BIWG	Binghamton Group	10/20/1994	A	MS
CDT	Morning Group Two	03/07/1995	A	PC1
CDTP	all program staff	03/07/1995	A	KH1
CUSU	customer support	02/16/1998	P	GB
G1	Group for Test	10/14/1993	A	MS
IMA-1	Treatment team 1	12/01/1996	A	MS
SAT CD	S.A.T. Unit - CD	02/03/1994	A	MS
TEST	testing	01/27/1998	P	GB
ZEVI	Zevi's test group	10/22/1997	A	ZS

Group: 6 men ext hlp req

The Help Screen at the 'Group:' prompt in D-1 AG.

Group: BIWG Created by: MS Entered on: 10/20/1994

Description: Binghamton Group

Allowed users: A

Group members:

JM  
JR  
JSM  
BE  
DD1

20 men ext sch fwd req

Group description/definition screen in D-1 AG.

## Deleting a Staff Group: DG

Choosing **DG** in the mail Utilities Sub-menu allows the user to delete a staff group in its entirety. This option asks for the name of the group and then displays the group named, as above. <Hlp> is also available here. The system then prompts: '**Delete this entry?**'. The user can select this group for deletion or enter another group code.

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

Group:TEST  Created by:GB  Entered on:01/27/1998
Description:testing
Allowed users:P
Group members:
MS
DSF
DEW
ZS
Group member operator codes.

Delete this entry? (Y.N)Y
1 men ext bck req
```

The 'Delete this entry?' prompt in D-1 DG.

## Maintaining Mail

### Batch Deleting Mail Messages: DE

The **DE** utility can be run periodically to delete closed messages from either the **Inbox**, **Outbox**, or **Both** that are of a certain age. New or read messages will not be indexed for deletion. Both the sender and recipient have to mark items for deletion before they will be deleted from the system. The sender can delete from the Outbox automatically by answering **No** to the '**Retain a copy:**' prompt while posting a new message in **D-1 PS**.

The first screen in **DE** asks the user if the system should display only the index of items stored for deletion. Then the user is able to determine by type, dates and origin the items on which the deletion utility should be run. The display allows the user to see the mail items by status and subject, along with the selected criteria. If the user chooses not to display the items, the deletion utility deletes the stored items based on the selected criteria.

```

IMA Mental Health - Development Area Option:D1 -DE
Electronic Mail

Batches of either closed Incoming mail (Inbox)
or saved outgoing mail (Outbox) may be deleted here
selectively based on the mail type and a date range.

A list of the items that would be deleted by your
selection may also be viewed first, prior to the
actual deletion, by responding 'Y' to the 'Display
only' question

Display only? (Y.N)Y
Type:all
Starting date to delete:first
Ending date to delete:last
Inbox, Outbox, or Both? (I.O.B)B

1 men ext sch fwd req

```

Answering Yes here will only DISPLAY the items that could be deleted with the criteria selected below.

The selection criteria screen in D-1 DE for the deletion utility display in Electronic Mail.

```

IMA Mental Health - Development Area Option:D1 -DE
Electronic Mail

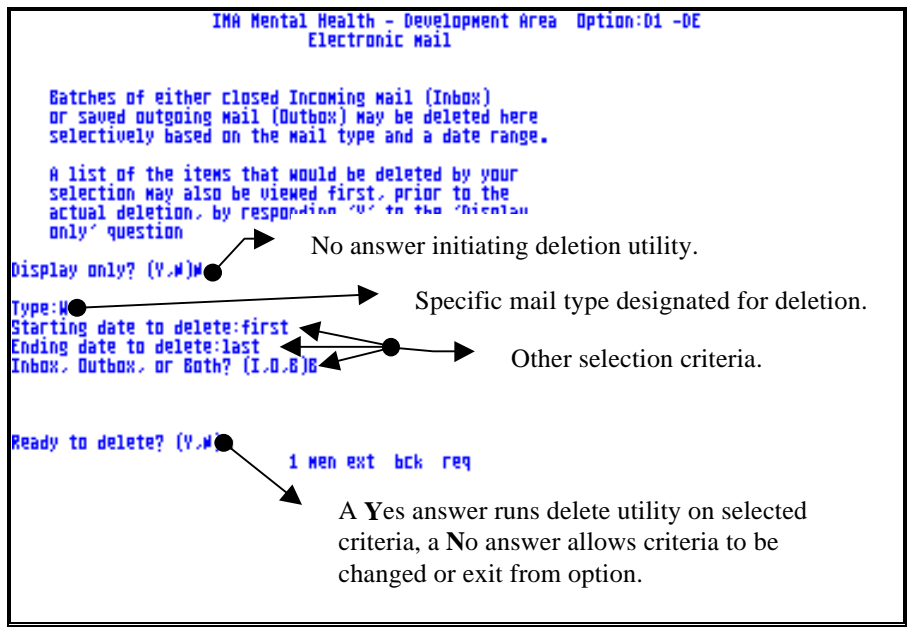
For/From      action      Type/Status      Subject      Sequence
Brad R. Eisenberg 02-13-98  M/I Clsd/O training schedule 39391
Brad R. Eisenberg 02-13-98  M/I Clsd/O lunch meeting 39397
Brad R. Eisenberg 02-13-98  M/O Clsd site training 39398
Mike Samel 02-13-98  M/O Wew Wew E-Mail Documentation 39399
Zevi Samel 02-13-98  M/O Wew Wew E-Mail Documentation 39400
Dafna Frydman 02-13-98  M/O Clsd Wew E-Mail Documentation 39401
Denis P. Quinn 02-13-98  M/O Wew Wew E-Mail Documentation 39402

Type <return> when done
1 men ext

```

Subject of message by sender.  
 Type & Location (I or O)/Status by sender and recipient.  
 Action date determined by sender.  
 For/From dependent on Inbox or Outbox location.

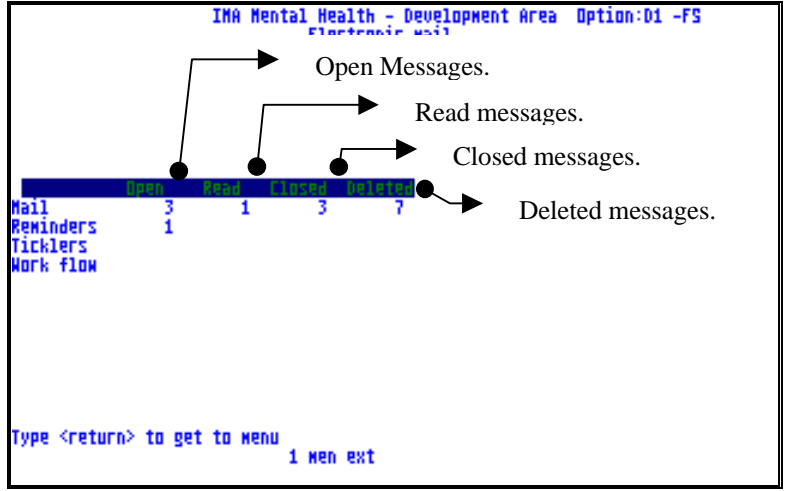
The index DISPLAY for viewing old mail items for deletion in D-1 DE.



The deletion utility for a specific type mail in D-1 DE.

**File Statistics: FS**

The cross-reference at **FS** is an important index of all mail messages to keep the user aware of the load of saved mail messages by type and status. A large number of these messages will cause the system to get bogged down and run slower than usual or necessary. When these numbers become large, it will be necessary to run the delete utility.



The File Statistics cross-reference by mail type and status.

## Managing Remote/Internet Mail

### Retransmit Remote Mail: RT

Any messages that have been sent to an individual at a remote site (Internet mail) can be resent to the same or another address using option **RT**. Internet mail permission must be designated by the system administrator to activate this option. The system provides prompts for dates, type and recipient. The remote messages are indexed for selection and can be resent to the original recipient or forwarded to someone else.

---

**Note:** It is necessary to answer **Yes** to the '**Retain a copy?**' prompt while posting a new message in order to have be able to retransmit the message in **RT**.

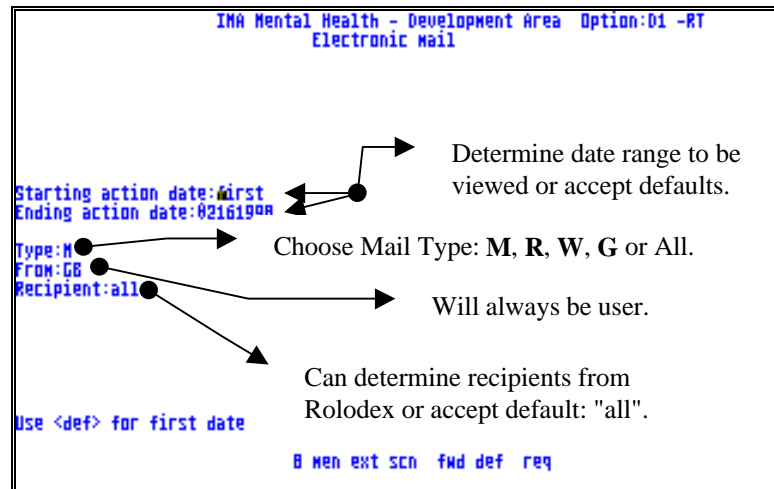
---

```
IMA Mental Health - Development Area Option:01 -RT
Electronic Mail

Starting action date: first
Ending action date: 02161998
Type: M
From: GB
Recipient: all

Use <def> for first date

B MEN ext scn fwd def req
```



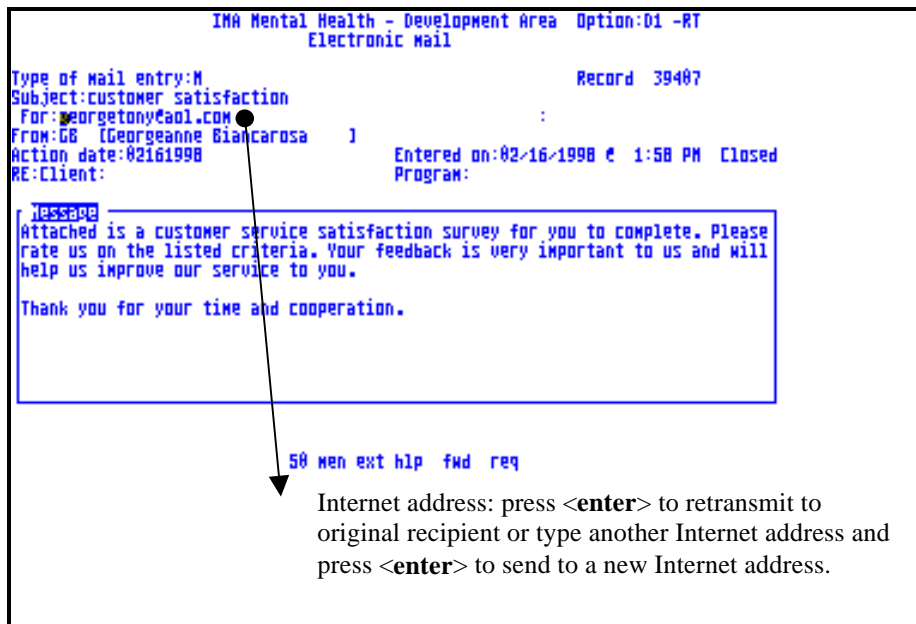
The selection screen for D-1 RT.

```
IMA Mental Health - Development Area Option:01 -RT
Electronic Mail

For Action Type Status Subject Sequence
georgetony@aol.com 02-16-98 M Clsd IMA Customer Support 39404

<ret> - display, <bck>.<fwd> - select
1 MEN ext bck fwd
```

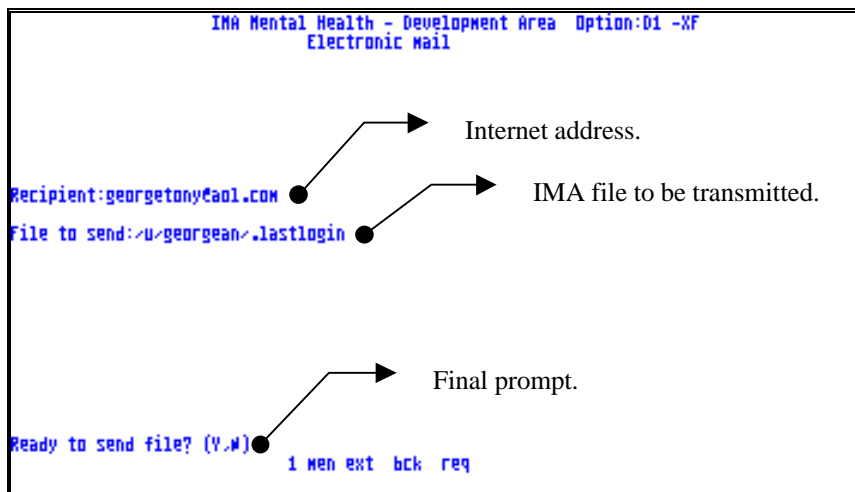
The index of retained remote/Internet messages in D-1 RT.



The message selected for retransmitting in D-1 RT.

### Transmit a File: XF

Option **XF** allows the user to send a file to a remote mail recipient through Internet mail. The system administrator designates permission for access to this option. The system will ask for the recipient and file to send to be named. The system will give a final prompt, '**Ready to send?**' before transmitting with a **Y**es answer, allowing the user to change the file or specify another recipient.



The selection screen to transmit a file to a remote/Internet address.

### Move Transmitted Files: MT

**MT** moves files transmitted through Internet mail to the appropriate directory for viewing.

---

# Ticklers

Ticklers are a special type of e-mail message that are sent by the system and tracked through administrative reports on the client database according to status (**O**verdue, **C**urrent, **1** month ahead or **2** months ahead). Although they require set-up in Menu Option **H** by the system administrator, receipt of the tickler messages is handled in the e-mail sub-menu dedicated specifically to ticklers. They are reminders by calendar or client, based on the requirement that an activity take place with regard to a specific client. These activities include medication reviews, treatment planning and managed care authorizations, among others.

The system sends the identified responsible party an e-mail message reporting the client, the activity due and its status. This message is then tracked by the system in the client database and upon completion, makes a corresponding record in the client database according to activity and completion date. These completion dates can be viewed, monitored and changed in **A-1 TD**.

---

**Note:** See the Administrator's Guide for detailed tickler set-up description.

---

These system generated messages are received in e-mail like other messages, but must be maintained using the following options under the Tickler heading: move the tickler to another staff member for completion, complete and close the tickler or delete old ticklers. They operate as follows.

## **Move to Another Staff Member: MV**

The user is able to move the tickler to another staff member by selecting **MV**. The initials for the original recipient and the new recipient are entered along with the client referenced (all or an individual client number). The system then asks if the user is ready to move the tickler, requiring a **Yes** or **No** answer.

```
IMA Mental Health - Development Area Option:01 -MV
Electronic Mail

Original recipient:GB Georgeanne Biancarosa
New recipient:DSF Dafna Frydman
Client 3000 Client Test

Ready to move the ticklers? (Y.N)
1 MEN EXT bck req
```

*The dialogue screen for moving a tickler to another staff: MV.*

## **Close ticklers: CT**

Option **CT** closes the ticklers as completed. The user enters the sequence number with which to start, the beginning and ending action dates, tickler type, origin and recipient initials. After this is completed a list of the ticklers meeting criteria appears for selection

by the user. The user selects the appropriate tickler to close using the up and down arrows or <bck> and <fwd> keys to highlight the selection and marks it as **Yes** completed and therefore closed.

Closing a tickler in **CT** will also generate a corresponding entry in **A-1 TD**. If online assessments are used by the agency, completing the tickler task will close the e-mail and generate a completion entry for **A-1 TD**.

```

IMA Mental Health - Development Area Option:D1 -CT
Electronic Mail

Sequence number:all
Starting action date:first
Ending action date:last

Program:all
Recipient:all
Subject:all
Client:all

Use <def> for all clients

6 men ext scn hlp bck fwd def req

```

The selection criteria for determining which ticklers to close: **CT**.

```

IMA Mental Health - Development Area Option:D1 -CT
Electronic Mail

Rec Subj Sta Client Action Seq. C13 Complete
DSF ITP W 2001 John Dbnifmt 02-16-98 39460 W
DSF DEWT W 3000 Client Test 02-17-98 39461 W
DSF ITP W 3000 Client Test 02-17-98 39462 W

<return> when done, <bck> or <fwd> to select, Y to close:
1 men ext bck fwd

```

The selection screen for choosing ticklers to close and mark as completed.

### Delete Ticklers: **DT**

In **DT**, the user provides the sequence number, starting and ending action dates, program, recipient, subject and client information. A screen is then presented from which to choose the appropriate tickler to mark as **Yes** delete. This deletes the tickler.

```

IMA Mental Health - Development Area Option:01 -DT
Electronic Mail

Sequence number:all
Starting action date:first
Ending action date:last

Program:all
Recipient:all
Subject:all
Client:all

Use <def> for all clients

6 Men ext sch hlp bck fwd def req

```

The selection criteria screen for deleting ticklers: DT.

```

IMA Mental Health - Development Area Option:01 -DT
Electronic Mail

Seq. Num. Client      Action      Seq. Num.
DSF ITP  W   2001 John Dbnifmt      02-16-98  39460  W
DSF ITP  W   3000 Client Test      02-17-98  39462  W

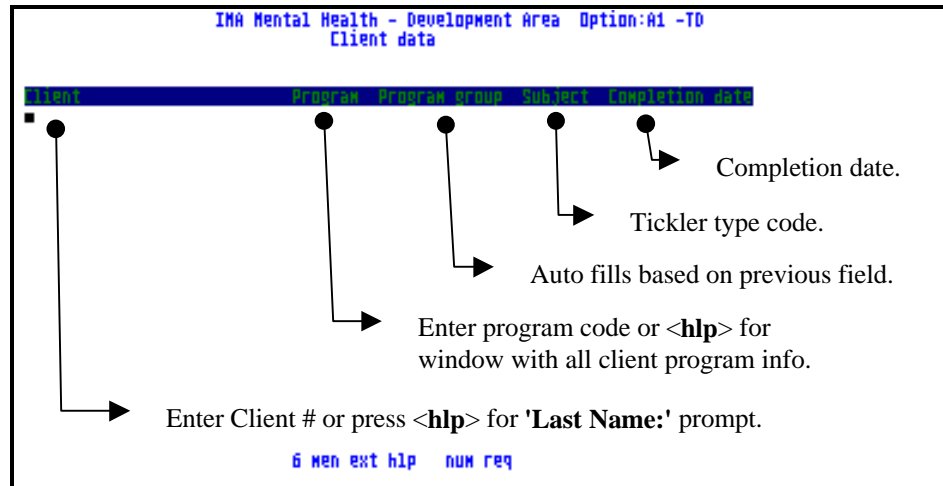
<return> when done, <bck> or <fwd> to select, V to delete:
1 Men ext bck fwd

```

The selection screen for ticklers to delete: DT.

### Change Tickler Dates: A-1 TD

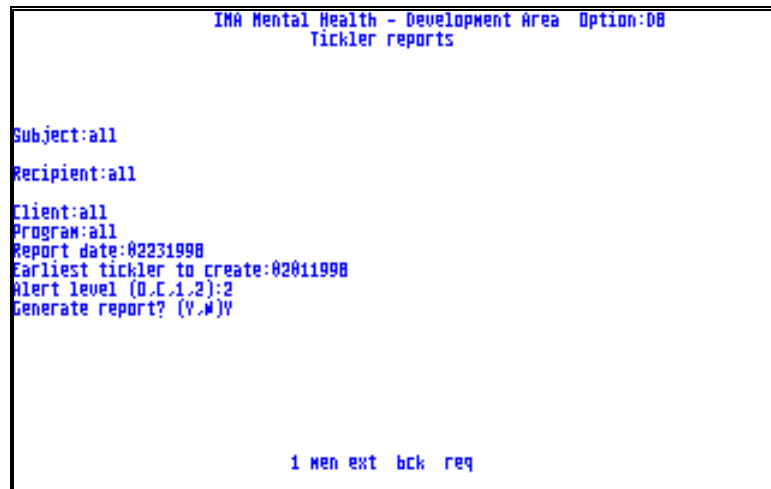
Tickler dates can also be viewed and changed in **A-1 TD**. Upon entering the selection screen, the cursor position is under the "Client" column and requires that the client number be entered. If it is not known, press **<hlp>** and the system will prompt **'Last name:'**. The client number and name will fill under the "Client" column. The system will then ask **'Display existing ticklers?'** If **Yes** is answered, an index of existing ticklers for that client will be presented for selection and changes can be made as necessary. If **No** is answered, the cursor will advance to be under the "Program" column for that field and the rest to be entered. Those others include "Program Group", "Subject", and "Completion Date". All of the client's programs, current and previous, are listed in a **<hlp>** window at the program column. The program group automatically fills based on the previous column answer and the program definition given in set-up at **H-13**. "Subject" refers to the tickler subject which is from Table **MALCAT** in **H-2**. The completion date is the date that the activity for the tickler was completed.



The initial screen in A-1 TD.

### Tickler Reports – D-8

Tickler Reports can be created and customized in menu option **D-8** by subject, recipient, client, program, report date, earliest tickler to create and alert level (**O**verdue, **C**urrent, and either **1** or **2** months ahead). The user can also choose to generate a report and order the sort sequence (program, subject, recipient, name and due date). A report is then printed with the specified options.



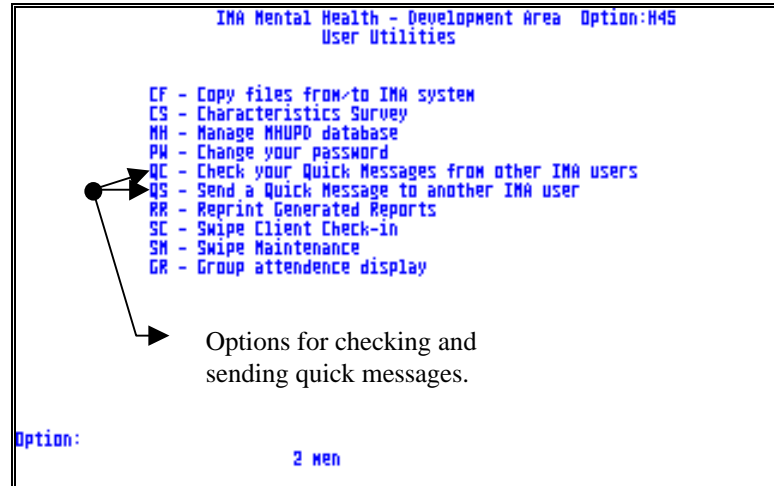
The selection criteria screen for running tickler reports: D-8.

---

## Quick Messages

There are two user utilities in sub-menu **H-45** that allow the user to send a quick message to someone else who is currently on the system. These quick messages are short, one-line messages that can be retrieved at the recipient's current screen or through the appropriate utilities sub-menu selection. These messages are sent and conceivably retrieved instantly. The Quick Message interrupts the screen with either a flash, beep or actual pop-up of the message, while e-mail is necessarily stored and waits for the user to retrieve it.

**Note:** Since Quick Messages are a single line of text entry, navigation is different for these memo fields. Only the left and right arrows will move within the text and the number of characters allowed is limited. Additionally, not all of the editor functions are supported due to the limited amount of space.

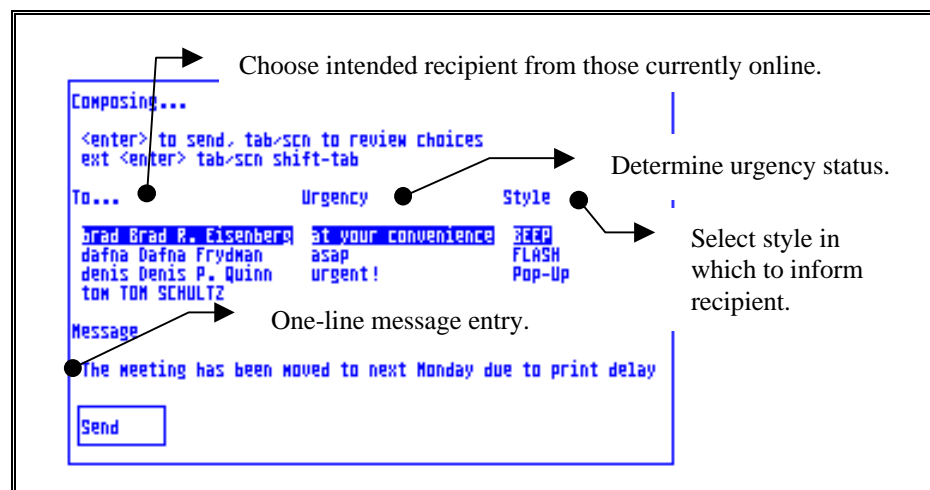


The H-Sub-menu for sending and checking Quick Messages.

### **Sending Quick Messages: H-45 QS**

To send a quick message to another user who is currently on the system, go to **H-45 QS**. The system will show a file titled "Composing...". Underneath, a window entitled "To..." a list of the users currently logged into the system is presented. Select one of those users by using the up and down arrows or <bck> and <fwd> keys and pressing <enter> when the desired recipient is highlighted. The "Urgency" status is determined next in the same way as above for '**at your convenience**', '**asap**' or '**urgent!**' Then "Style" is determined and selected in the same fashion as above for a '**beep**' or '**flash**' to alert the recipient that a quick message has been sent or for the quick message to '**pop-up**' in the recipient's screen.

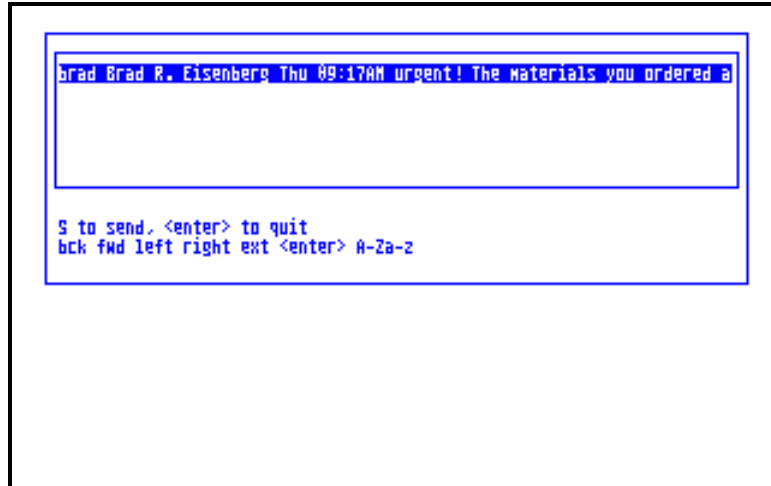
The cursor then advances to the "Message" where one line of text may be typed and entered. Pressing <enter> again will "send" the quick message.



*The selection screen for sending a quick message.*

## **Replying to Pop-up Quick Messages**

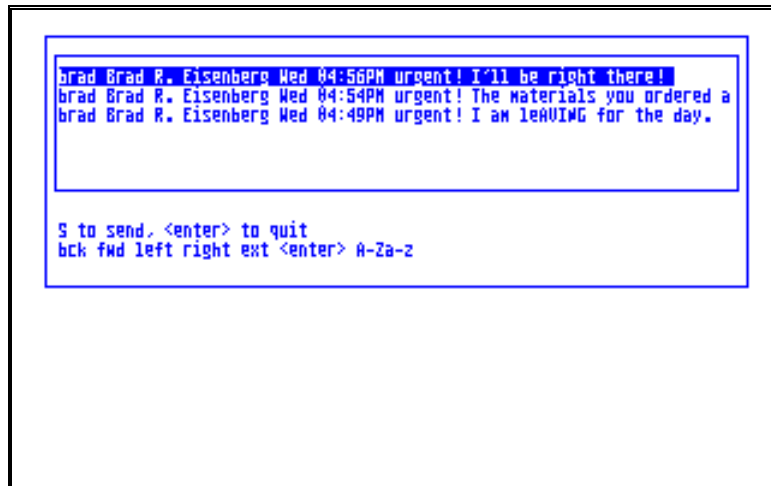
The pop-up quick message will appear and the user can use the left and right arrows to read the full line of message. Then, there is the option to "send". Typing <S> and pressing <enter> will put the user in the "Compose..." screen and the same procedures listed above can be followed. The former sender is not automatically pre-filled as the recipient and will have to be selected, highlighted and entered, as will the rest of the field choices.



*The pop-up quick message screen.*

## **Checking Quick Messages from Other IMA Users: H-45 QC**

Unless the sender sends a pop-up quick message, the recipient will have to go to **H-45 QC** to check quick messages sent by other IMA users after being notified that one has arrived by a beep or flash at the terminal. Select the message to read with the up and down arrows or <bck> and <fwd> keys, highlighting the chosen one and using the left and right arrows to read the full message line. The user can then choose to send a quick message by typing <S> and pressing <enter> or pressing only <enter> to return to the sub-menu. The previous instructions are then followed to send a quick message.



*The Check Quick Messages screen in H-45 QC.*