

# *Main Frame* User Guide

## *Module 2*

### *Navigating PMS*

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## Overview

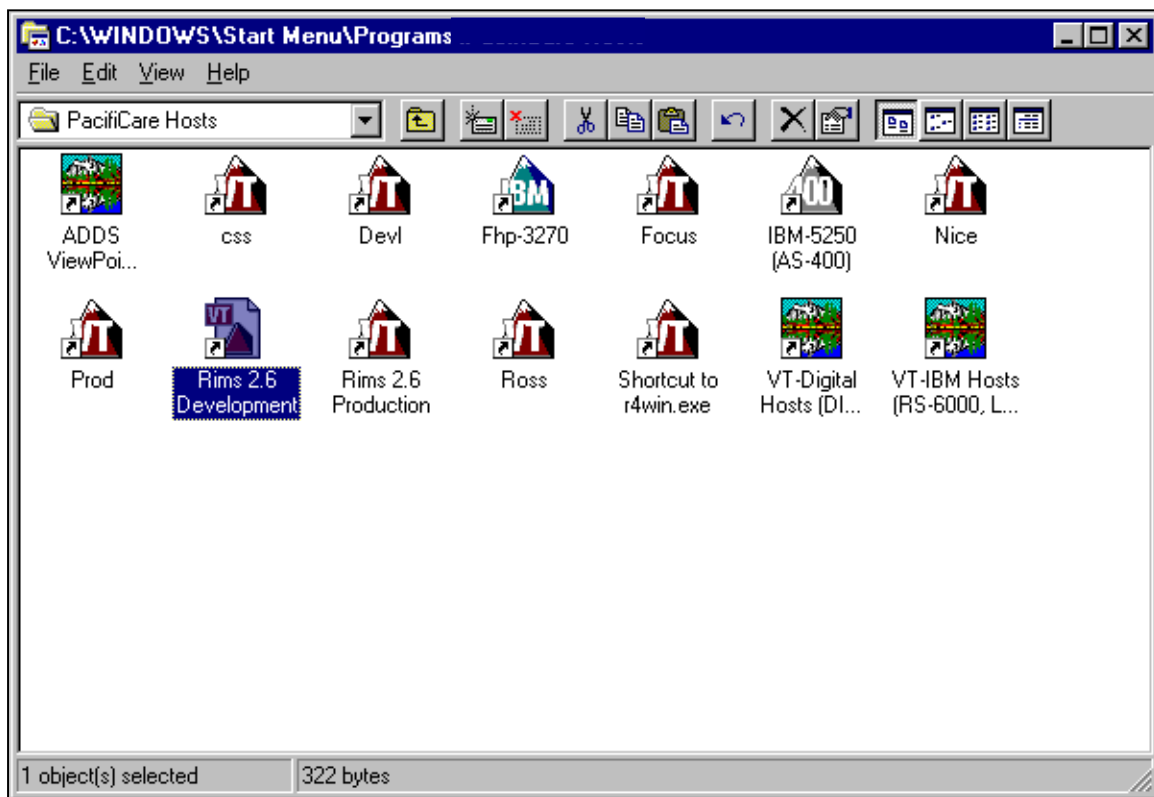
This lesson discusses how to sign-on, move around, and log-off the Resource Information Management System (PMS). It also explains how to view and print PMS screens and reports.

The lesson describes keys, functions, and terms common throughout PMS. This section is not intended to describe any particular screen, but to teach you to navigate throughout the system.

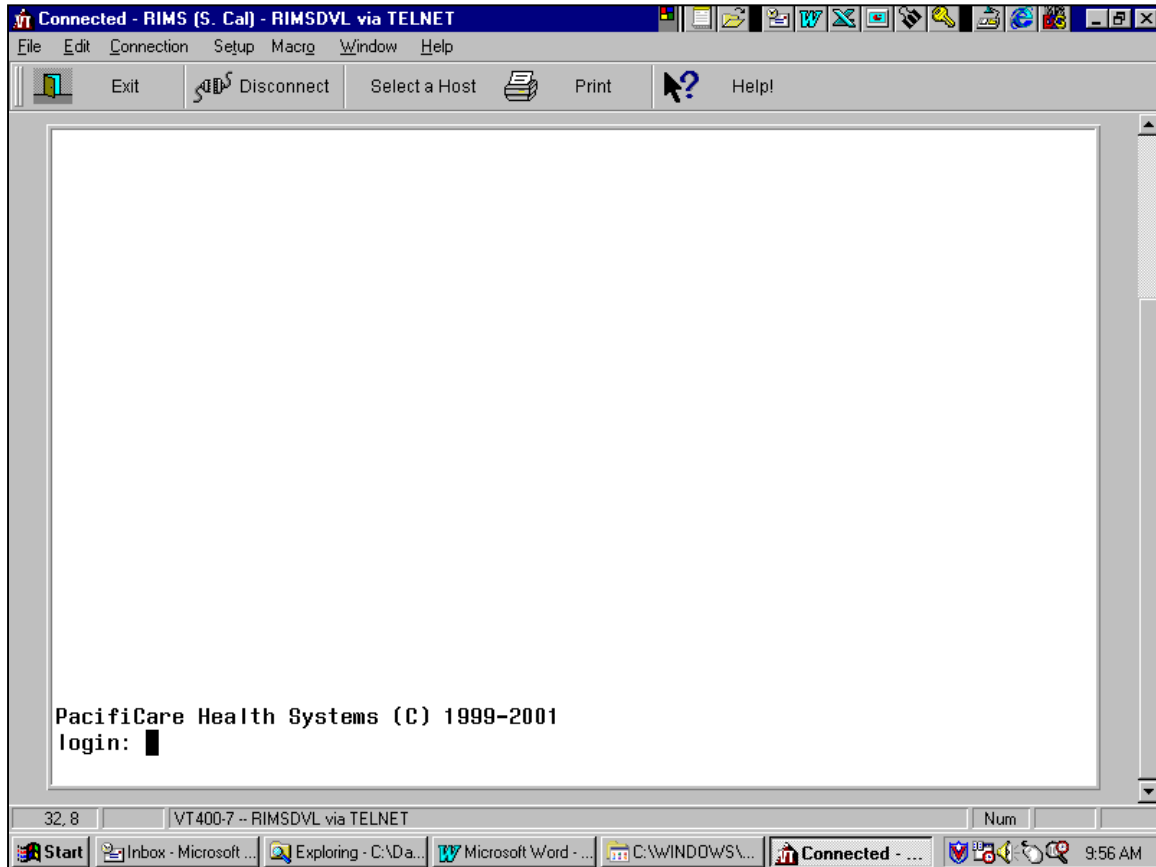
## Signing on to PMS

Follow these steps to sign-on to PMS from your Windows desktop.

1. From your Windows desktop, double-click the Main Frame Hosts icon.
2. Double-click the PMS Development icon.



After selecting the Development icon, the following screen appears.

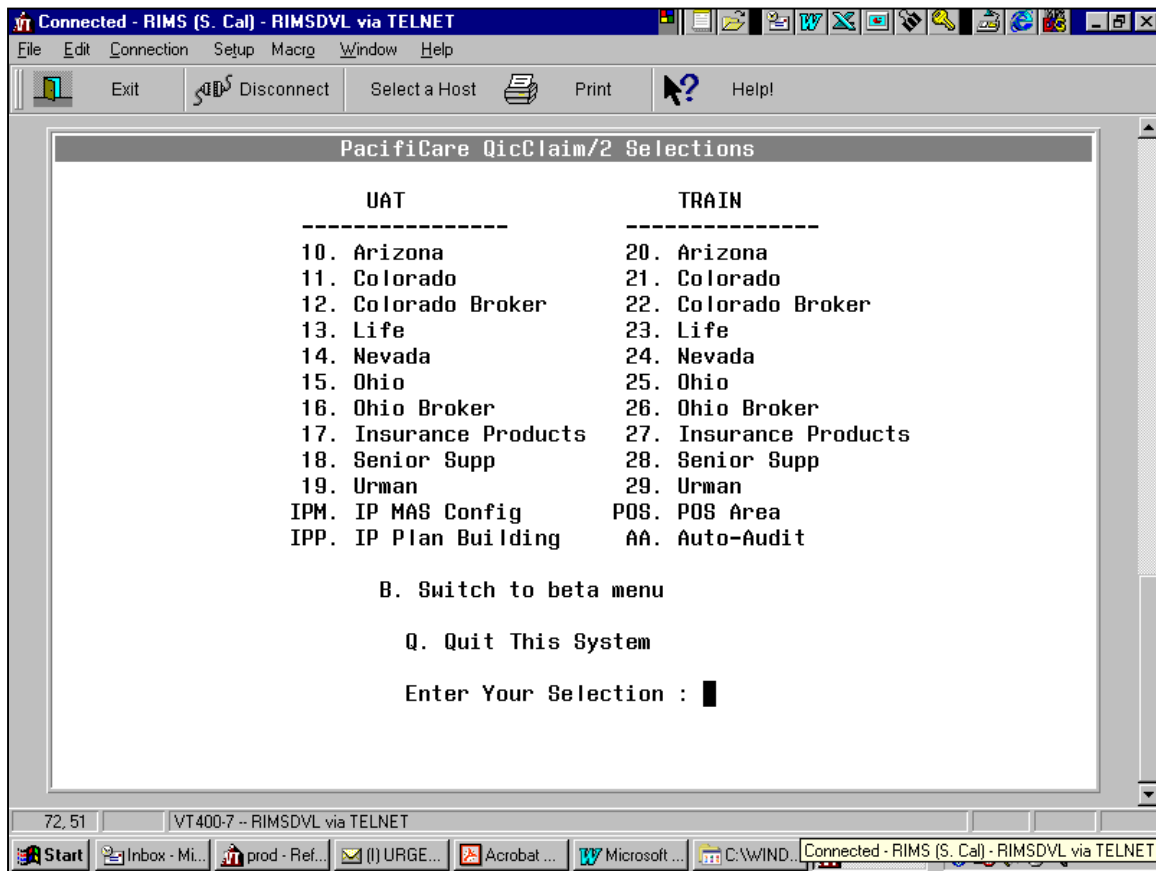


Main Frame Health Systems Login Screen

### 3. At login,

- For Development - Type **xtrain** and press **Enter** to display the password field.
- For Production - Type your user name in lower case letters and press **Enter** to display the password field. Your user name is usually your last name (up to the first 6 letters), followed by the initials of your first and middle names.

4. At **password**, type **xtrain4phs** in lower case letters and press **Enter**. The Main Frame QicClaim/2 Selections screen appears.



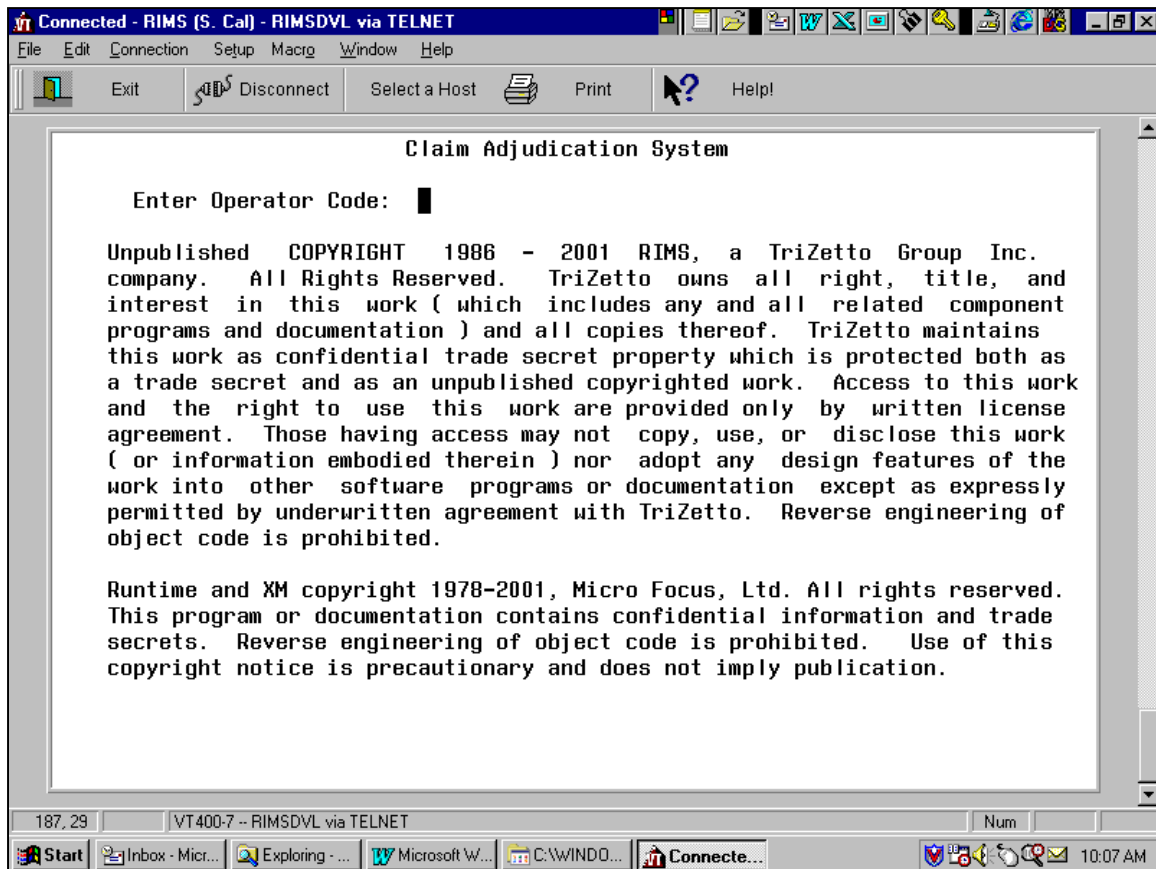
### Main Frame QicClaim/2 Selections Screen – Signing on to PMS

**Note:** Production mode displays a different screen.

5. At the *Enter Your Selection* prompt, type the number corresponding to the database or production account where you are working.

**Example:** If you are working in the Insurance Products database, type **26**.

After typing the appropriate number, the following screen appears.



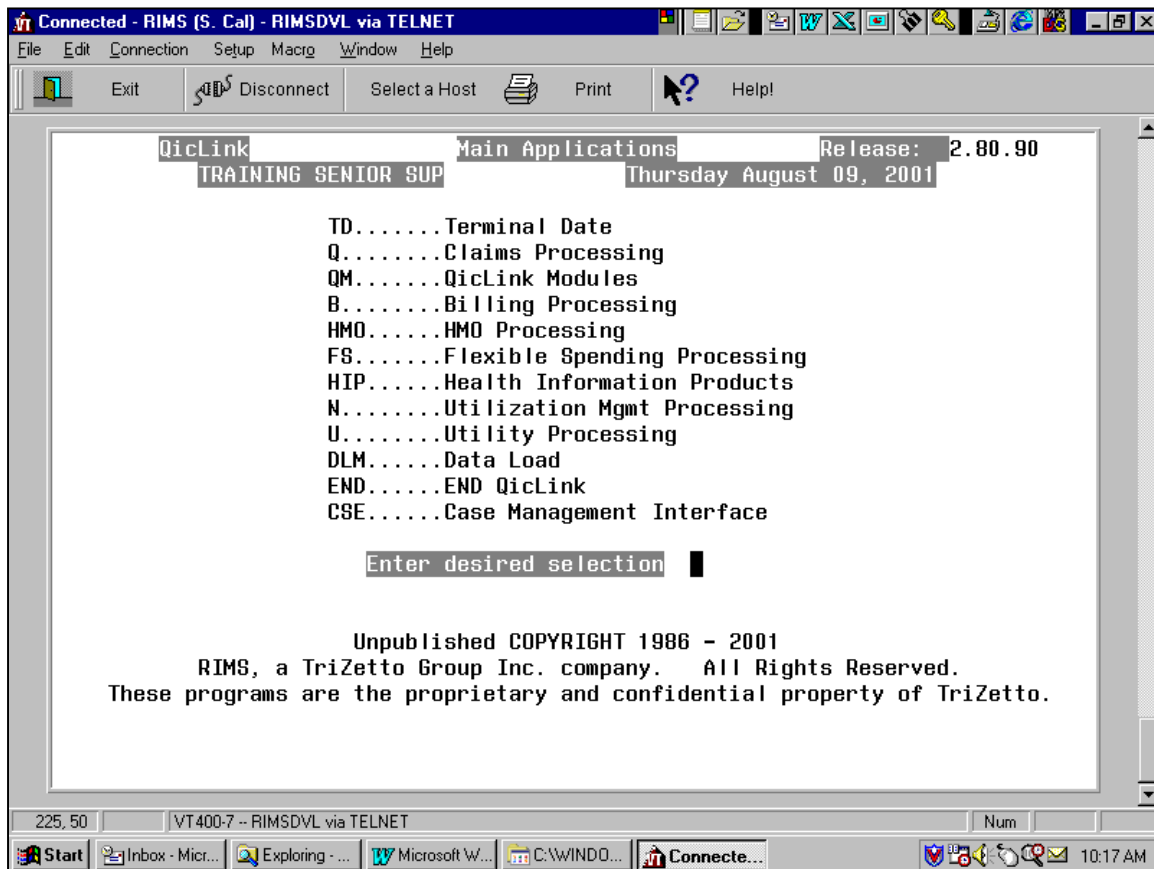
### Enter Operator Code Screen – Signing on to PMS

6. At the *Enter Operator Code* prompt, type your operator code using capital letters, if applicable.

**Example:** For Development, type **123**.

**Note:** This is a good time to turn on **Caps Lock**. From this point most system entries should be in capital letters.

After typing your operator code, the Main Applications screen appears.



### Main Applications (Z) Screen – Signing onto PMS

You are now logged onto the PMS system. Most screens you are authorized to use are now available. However, the system may require a security code to access some screens.



## **Accessing System Screens**

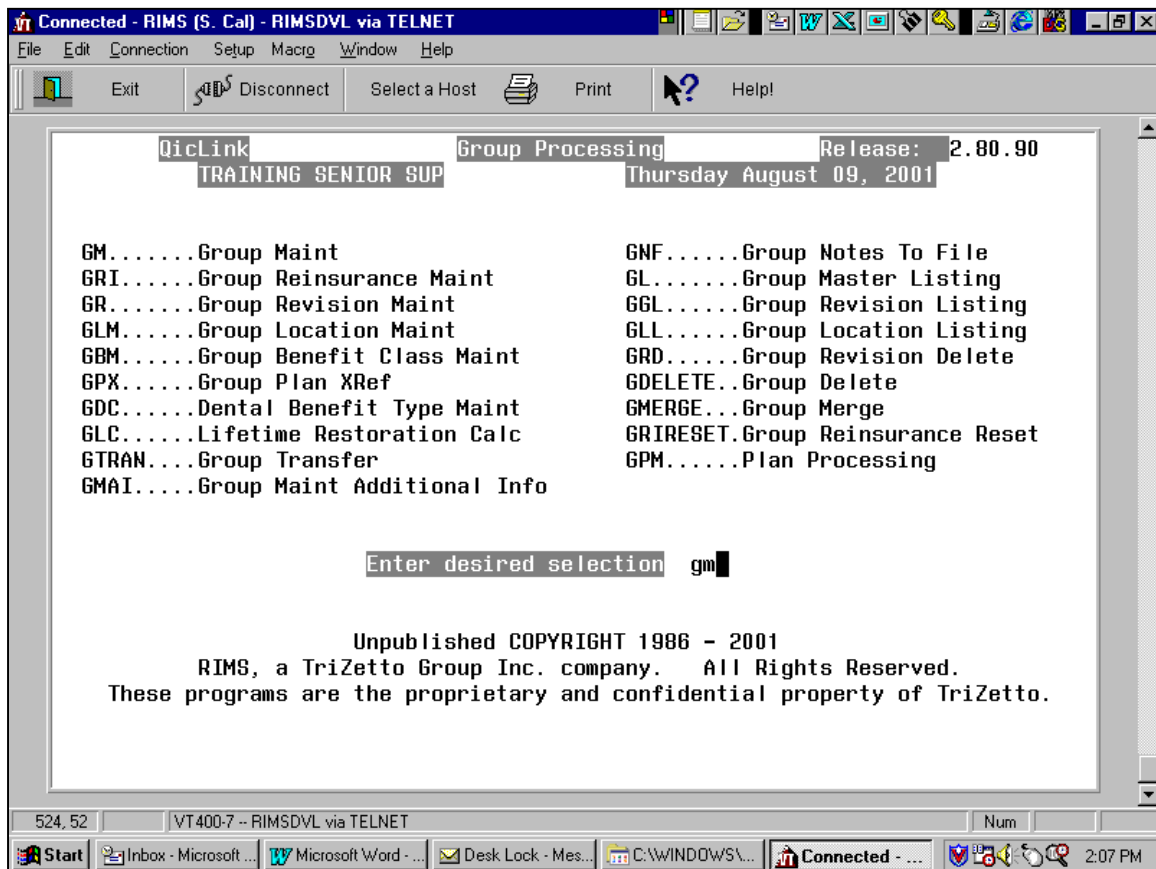
The PMS system is comprised of a series of screens listed on multiple menus. Most menus are grouped by function, like supervisory, enrollment, or group. In addition, each screen has a unique set of initials that represent the screen's name. You can access a menu by typing the first letter of the function or a screen by typing the initials of the screen name.

### ***Access via Function***

Typing the first letter of the function provides you with a menu screen listing most, if not all, of the sub-screens associated with that letter. This is helpful when you do not know the name or initials of the screen you want.

1. At the *Enter desired selection* prompt on any menu, type the first letter of the function to access. For example, type **g** to access the Group Processing screen.

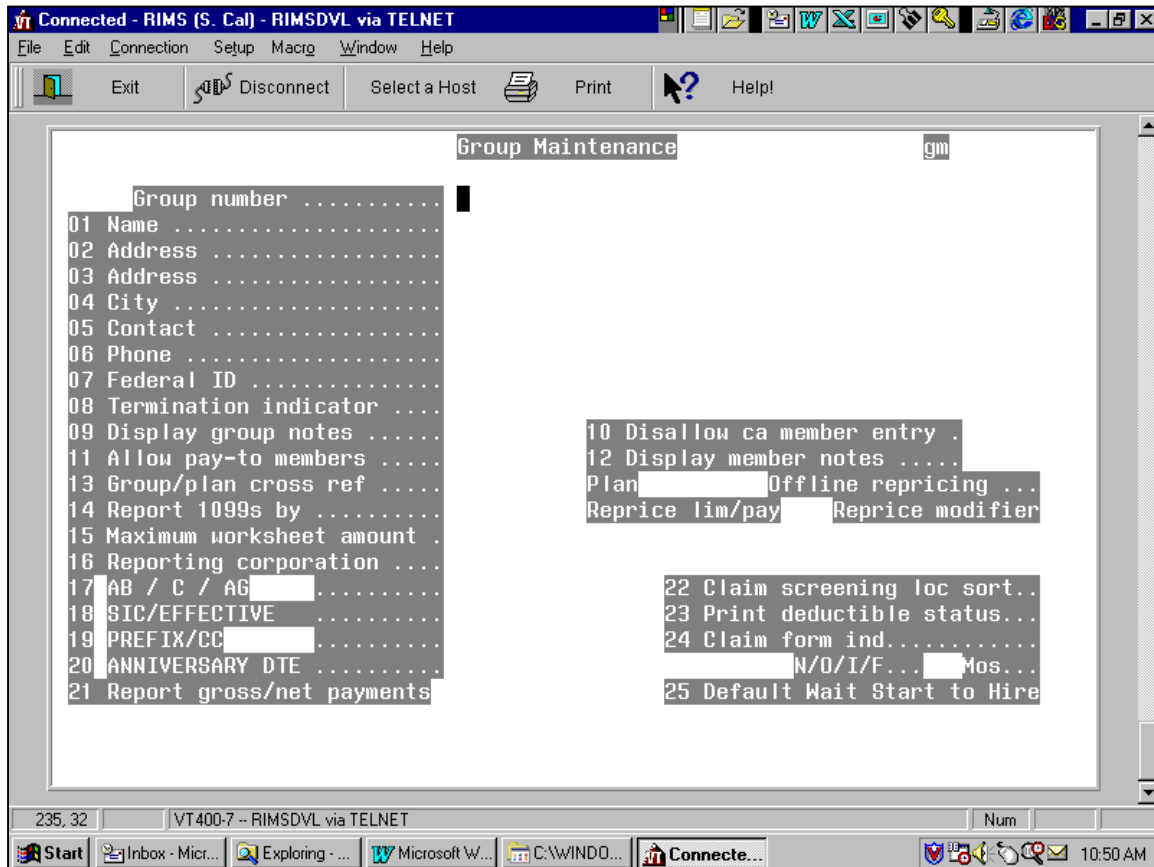
2. After typing **G**, press **Enter** to view the Group Processing screen shown below.



### Group Processing Screen

3. Review the list of screens to identify the initials of the screen you want to access.
4. At the *Enter desired selection* prompt, type the screen's initials. For example, type **GM** to access the Group Maintenance screen.

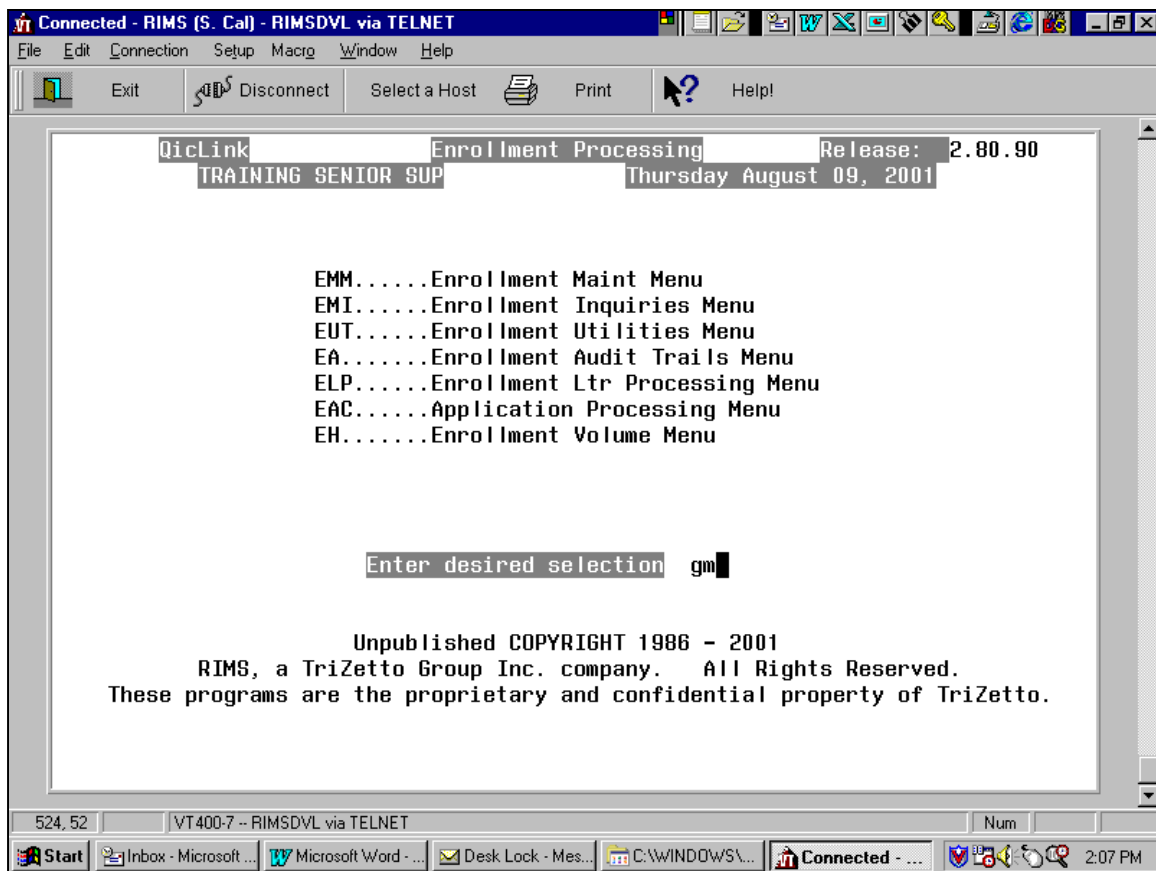
5. After typing **GM**, press **Enter** to view the Group Maintenance screen shown below.



Group Maintenance (GM) Screen

## Access via Screen Initials

When you know the name of the screen to access, type the screen initials at the *Enter desired selection* prompt on any menu. For example, from the Enrollment Processing menu screen shown below, type **GM** and press **Enter** to view the Group Maintenance screen.

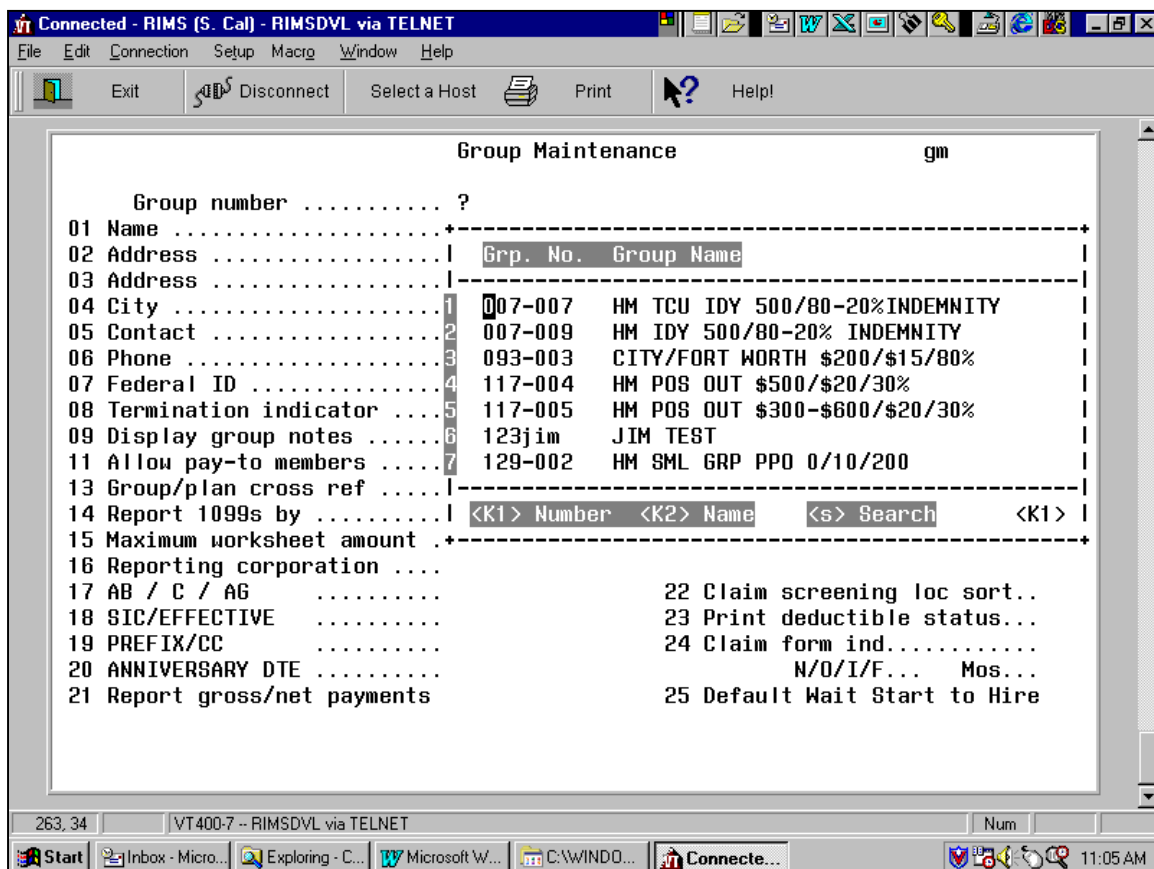


Selecting GM Screen from the Enrollment Processing Screen

## Using Option Windows for Help

Users access help within PMS via Option Windows. Option Windows, built into many of the screen fields, are designed to help you select a valid entry for that field.

1. Place the cursor in the field you need help with and press **F2** or type a question mark (?). In most fields, both entry methods are available. However, if one does not work, try the other.



Sample of an Option Window

The example above provides a list of group numbers and names available in this directory. In some cases the full option list appears in the box. In other cases, like our example, only a partial list appears.

2. If a partial list of group numbers appears, select an option from the table below.

Option	Explanation
Scroll	Upon entry, the first item on the list is highlighted. Scroll to other options using the down arrow key.
Sort Type	Along the bottom of the window there may be different sort types available. Type the alphanumeric code for the desired sort type (e.g., <K1> to sort by number or <K2> to sort by name). You do not need to change sort type if you want to use the current sort type.
Current Sort Type	To check how the system is currently sorting the information, look at the far right of your screen. The sort type listed on the right is the current sort type. The example on the previous page shows that the current sort type is <K1>.
Search	After you are in the correct sort type, you can start a search by pressing <b>s</b> . Type your search criteria at the <i>Enter Search Term</i> prompt.

After completing the search, other options become available.

3. Select an option from the table below.

Option	Entry	Explanation
Select Information	Highlight Item & Press <b>Enter</b>	If you are using the scroll option to locate information, scroll until the selection is highlighted and press <b>Enter</b> .
	Enter Item #	On most option windows, each item is numbered on the left. Press the item number to select it. For example, to select Jim Test on the sample Option Window, press <b>6</b> .
	Enter Item	On some option windows, you can type the number or name that appears. For example, providers are listed by TIN. Type the TIN. (This option is not available on the sample Option Window.)
No Selection	Press <b>Esc</b>	If the information is not available, press <b>Esc</b> and no selection is made.  <b>Note:</b> If you press <b>Enter</b> , highlighted information is selected.

**WARNING**

Use Option Windows with caution. In many cases, the system is providing you with a system wide list. Some options have not been approved for use within our Service Center. If your training specifies using a specific entry, do not select other options without authorization.



## Moving between Fields

### *The Enter Key*

Use the **Enter** key to move from field to field within a screen. After typing the field information, press **Enter** to advance to the next field. Press **Enter** to advance to the next field without making a field entry when the field is not mandatory or you are not changing the information currently in the field.

**Note:** If the field is mandatory, pressing **Enter** without typing information in the field takes you back one field.

### *Blind Fields*

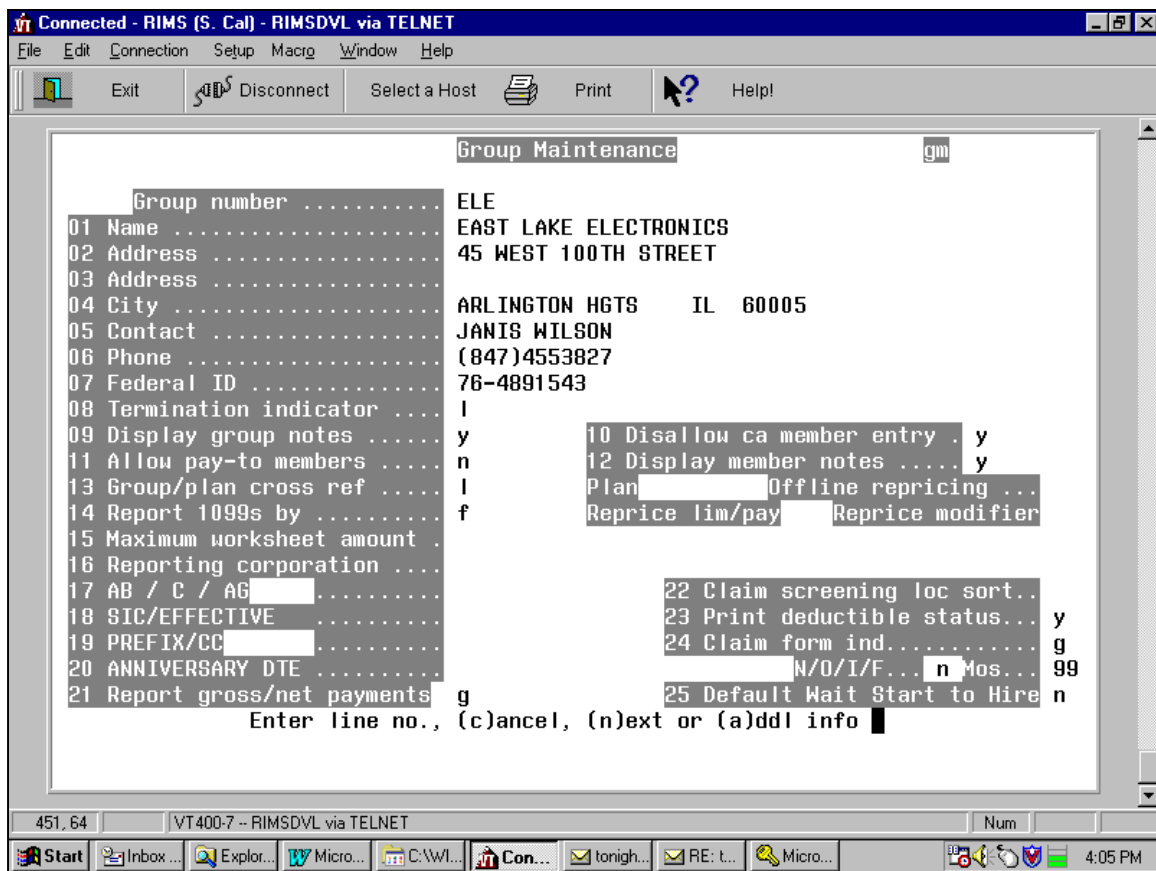
PMS screens have many *blind fields*. Blind fields are multiple entry areas that cannot be seen on the screen. Examples of blind fields on the MAS and Provider screens are the 2 fields, **state** and **zip code**, on the line titled **City**. Another example of a blind field is the modifier field on the Claims screens. Press **Enter** in a blind field to move the cursor to the next field.

#### **WARNING**

**Never** use the Tab key in PMS. Pressing Tab between fields can cause you to bypass blind fields.

## Option Menu Prompts

Most screens do not allow you to return to a field to change an entry. However, when the screen is complete, a prompt appears at the bottom of that screen giving you the option to go back and make changes.



Completed Screen with Prompt

There are several types of option menu prompts. Below are examples representing the two basic types.

**Type 1**     Enter line no., (c)ancel, (n)ext or (a)ddl info

**Type 2**     (n,q,s,h,t,f,m,r,d,i,a,c,o,l,g,e,u,u#,p,v,x,y,?)

The actual options vary depending upon the screen accessed. For Option Menu Type 1, select an option from the table below.

Options	Purpose
Enter line no.	To change information on one of the above lines.  <b>Note:</b> To change information on more than one line, type the lowest line number and the symbol (-). This allows you to navigate the fields line by line.
(c)ancel	To clear the vendor distribution information without saving the changes.
(n)ext	To display the next vendor.
(a)dd	To add additional information on the Group Maintenance Additional Information Screen (GMAI).

In Option Menu Type 2, each of the letters represents a choice of actions or screens available. The options are relative to the current screen.

A question mark (?) is usually the option furthest to the right of the

line of options.

To view an option window describing all of the choices:

- Press **Shift+?** and press **Enter**, or
- Press **F2** and press **Enter**

## Using Functions Keys

The function (F) keys on the top row of your keyboard act as shortcut keys to initiate other PMS programs without losing the information currently on screen. Many function keys are user specific. For example, the F3 key for an MAS Representative may take the cursor to an enrollment screen, while F3 for a Claims Examiner may take the cursor to the provider lookup screen.

For training purposes, all users have the same function keys programmed. The common function keys are as follows:

Function Key	Description
F3	Takes you to the HI or claim history screen.
F4	Takes you to the EI or enrollment lookup screen.
F5	Takes you to the MMQ or miscellaneous code maintenance screen.
F6	Allows you to run any other program you have access to.
F8	Runs system calculator. To exit the calculator, press <b>Q</b> and then press <b>Enter</b> .
Never use F10	See warning note below table.

**WARNING**

Never use the **F10** key.

In some cases, the F10 key helps you to exit a field or screen. However, this action also causes a small amount of damage to the database. If F10 is used often enough, the system will go down. F10 is only to be used upon instruction from IS.

## **Exiting PMS Screens**

After completing or viewing a PMS screen, the cursor usually returns to the top of a blank screen. For example, if you have completed entering a claim in CA, the system returns the cursor to the beginning of a new CA screen. To exit the screen, leave the first entry field blank and press **Enter**. This usually moves you to a menu screen. From the menu screen you can move to any other screen within PMS.

**Note:** In some screens the above exit method does not work. Specific instructions for each screen are available later in the training course.

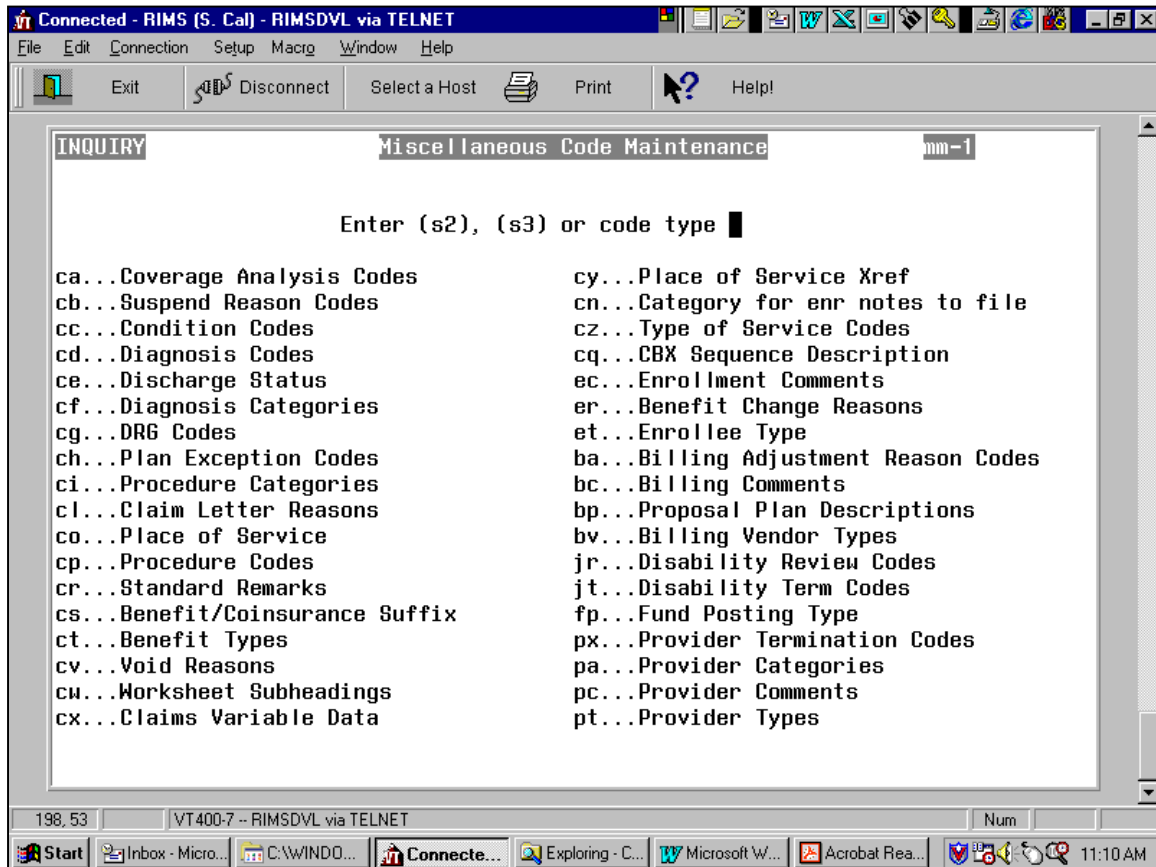
## Using MM Codes

Company defined codes are used to define system entries throughout the PMS system. These codes define everything from *enrollee type* to *payment reasons*. As a group, the lists of codes are available on the system under the Miscellaneous Maintenance (MM) menu.

These codes are used system wide and can only be maintained by specific people. For everyone else, an inquiry version of the list is available under Miscellaneous Maintenance Inquiry (MMQ).

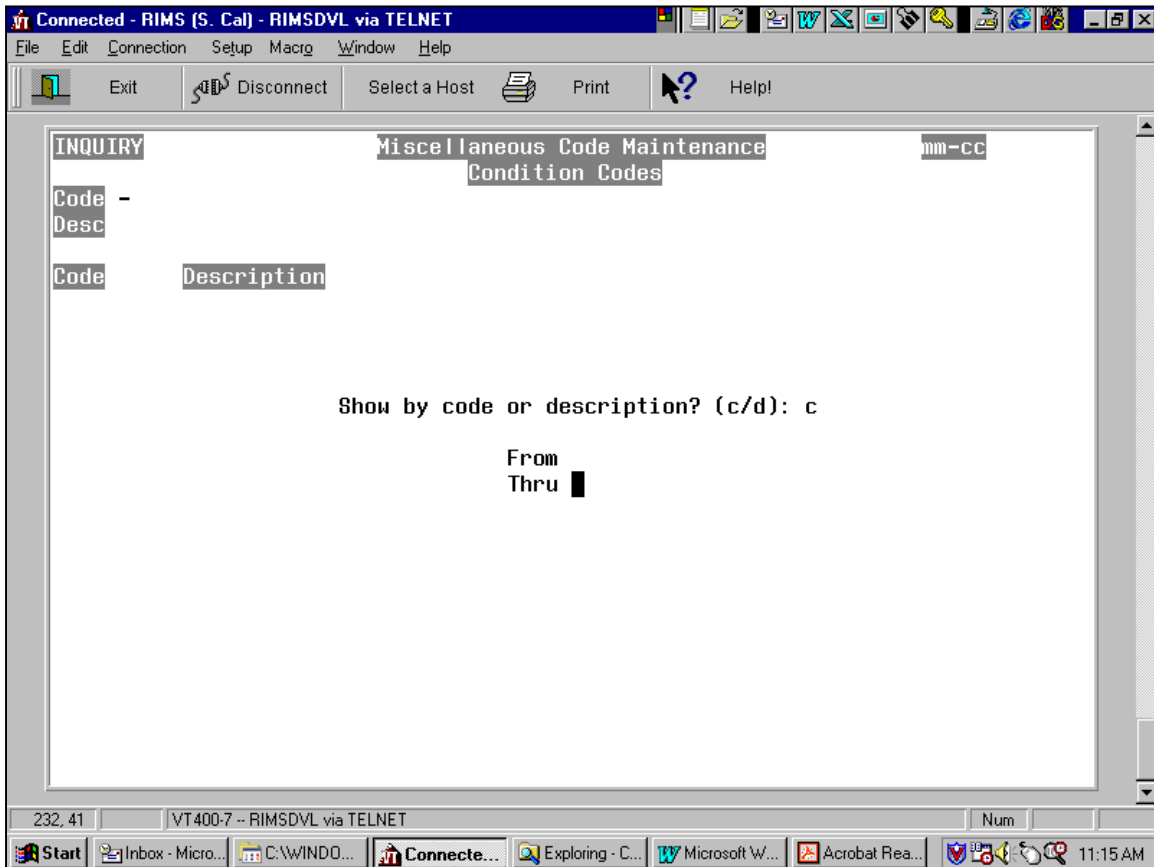


To view a list, type **MMQ** at the *Enter desired selection* prompt. The following screen appears.



Miscellaneous Code Maintenance Inquiry (MMQ) Screen

At the prompt, type the code type and press **Enter**. For example, type **cc** to view a list of available condition codes. The following screen then appears.



Miscellaneous Code Maintenance Inquiry Screen - Completed

To view a complete list of available codes, follow these steps:

1. Type the symbol (-) in the **Code** field. The following prompt appears:  
Show by code or description? (c/d)
2. Type either **c** to list by code or type **d** to list by description.
3. Press **Enter** through both the **To** and **From** fields. The list of codes appears.
4. If the list is longer than the space available on the screen, press **Enter** to see the next page.
5. After finding the information you were looking for, press **S** to stop scrolling the list.

For information on a specific code, type the code or description in the **To** field. This starts the list at a specific code rather than scrolling from the beginning of the list. To limit the information further, type a code or description in the **From** field.

## Branching between Screens

Branching is the method used to navigate from one MAS entry screen to another. Branching allows you to access another program directly, rather than returning to a menu.

Typing **b**, the first letter of the branching command, automatically saves the information displayed before proceeding to the new screen. In some cases, branching allows the new screen to populate with other available information.

### *Run a Program*

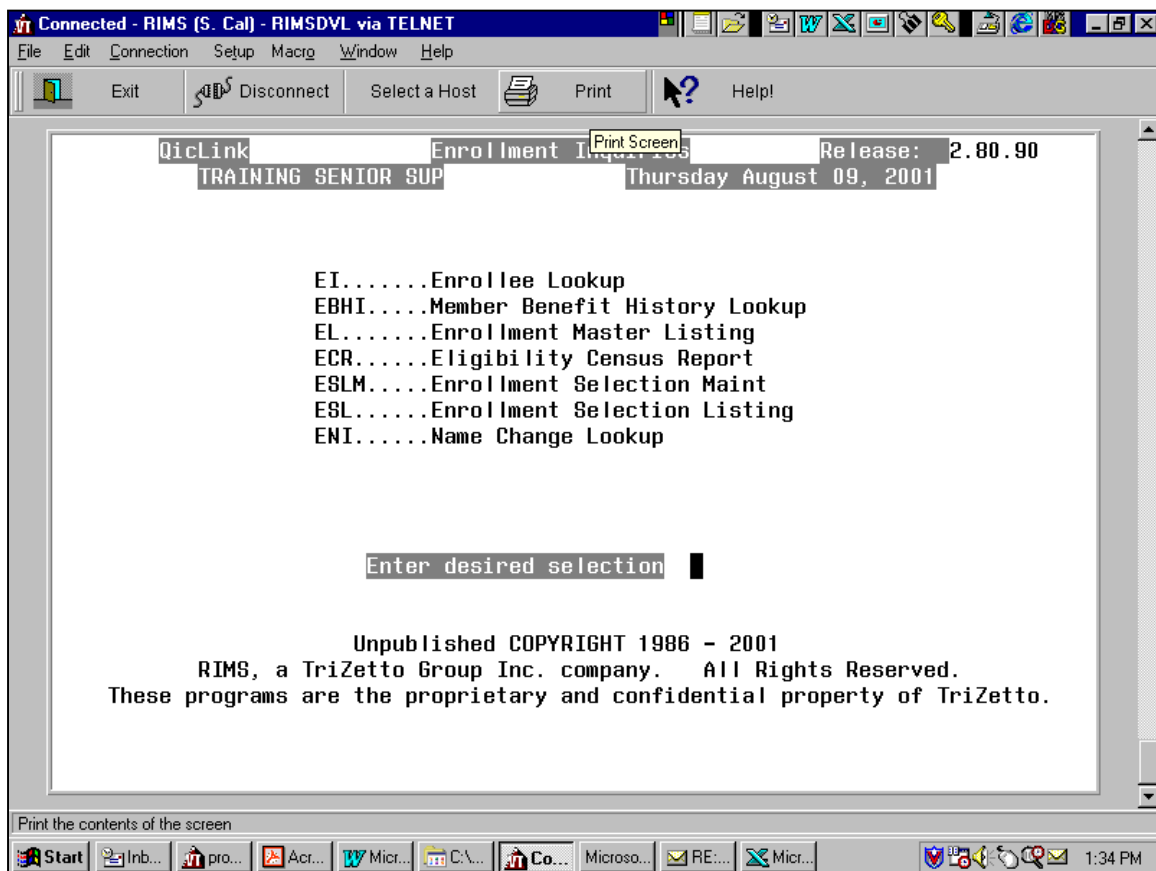
1. Type **b**, to view the following prompt:  
Enter Program To Run
2. Type the acronym for the desired program to run that program.  
For example, type **el** to run Enrollment Master Listing (EL). Type **gc** to go to Plan Co-insurance Parameters (GC).
3. Press **Enter** to save the information that displays.

## Viewing and Printing in PMS

There are several viewing/printing options in PMS.

### *Print a Screen*

To print only the information shown on a current open screen, select the print icon on the toolbar as shown below.



Printing a Screen from PMS

## ***Send a Report to the Spooler***

Due to limited computer and printer resources, reports should be **spooled** into a queue and viewed or printed from that queue.

1. At the *Enter desired selection* prompt, type the acronym for **any** report and press **Enter**. A print parameters screen displays the following prompt:

Enter form/printer to be used

2. At the prompt, type **LP1** to view the spooling screen with the prompt:

Enter (s)pool, (d)irect print or print (q)ueue

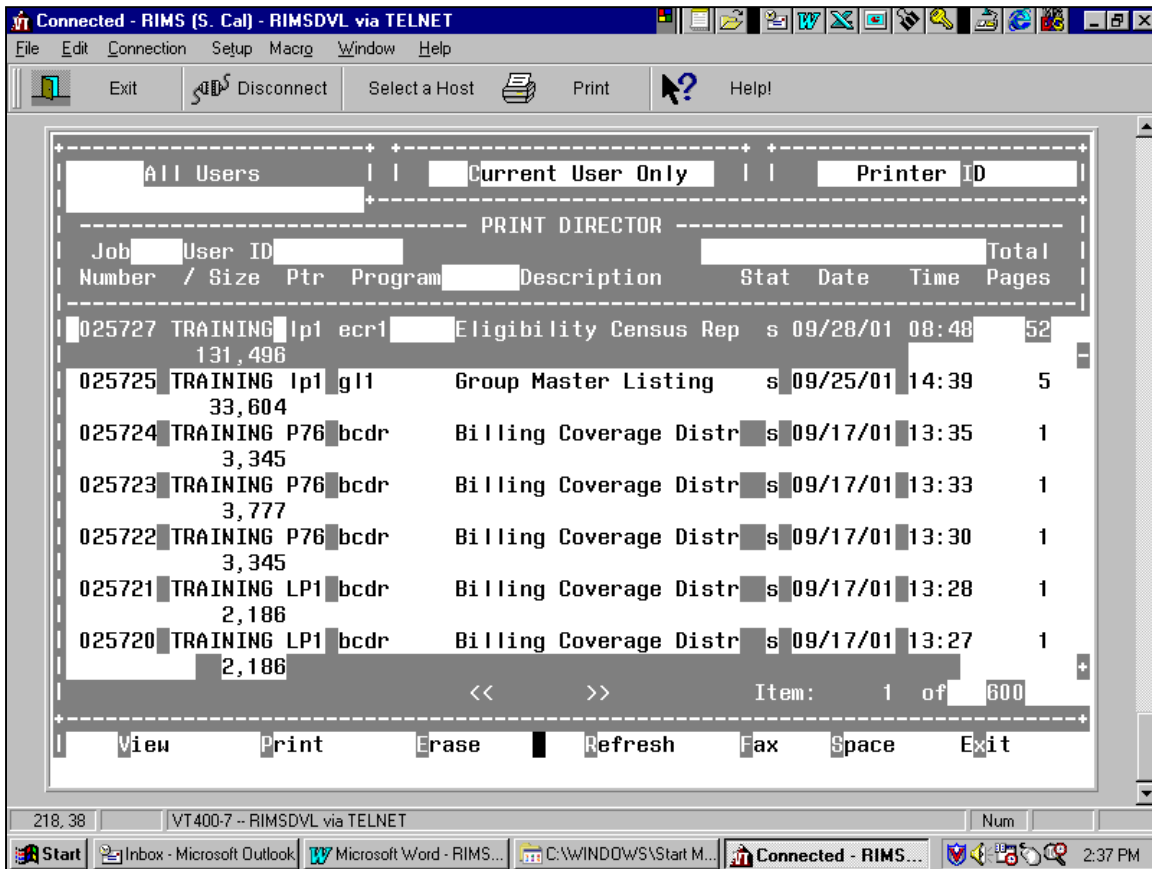
3. At the prompt, type **s** to send the list to the spooler. The list can be printed from the spooler at a later time.

**Note:** After typing LPT1, all prompts are program specific.

4. Type **e**, or press **Enter** to return to the menu screen.

## View and Navigate a Report on Screen

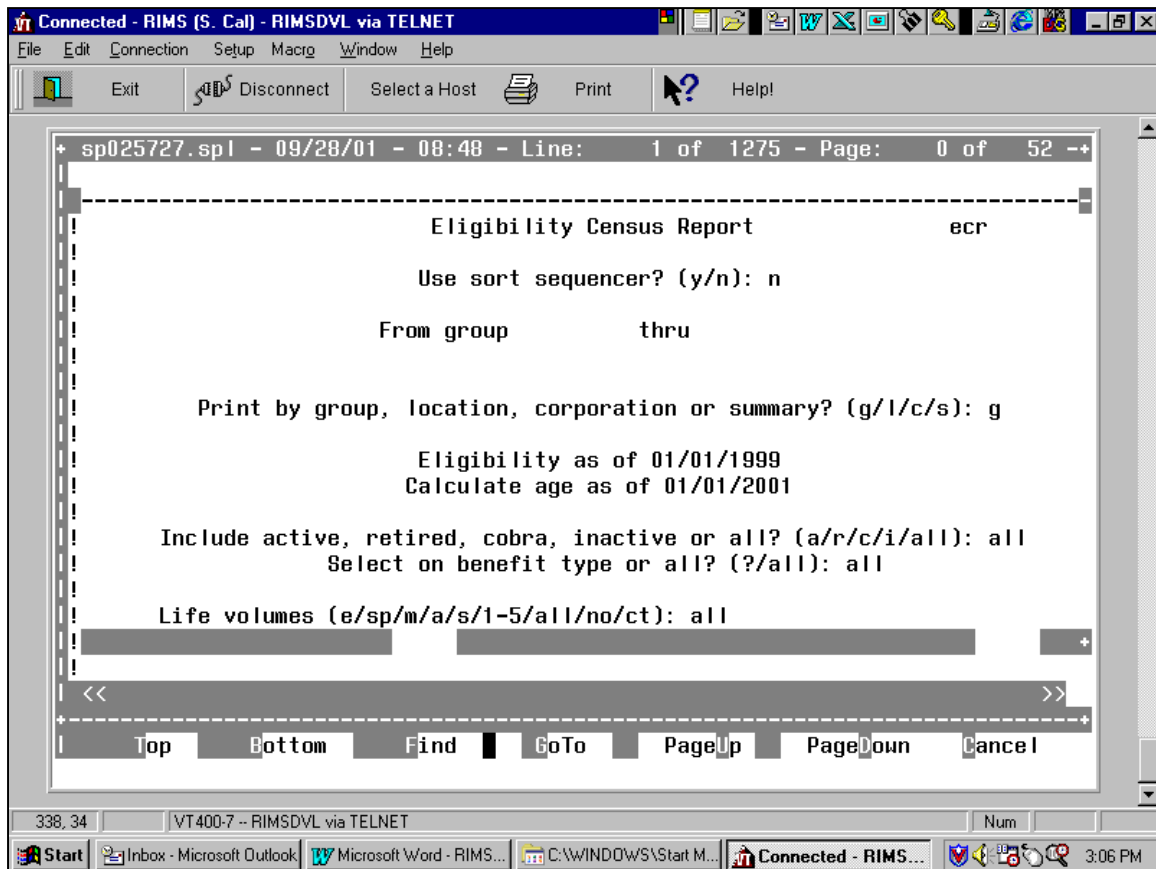
1. At the *Enter desired selection* prompt on any menu, type **PRTDIR** to view the screen shown below.



Print Director Screen

2. Use the arrow keys to scroll, find, and select the report or list requested.
3. Type **v** and press **Enter**. After pressing **Enter**, a prompt appears asking if you wish to view the entire report.

4. Select **OK** to view the following screen.



### Report Screen

5. To exit the program without viewing a report, type **x** and press **Enter**.



6. Navigate the on-screen report using the table below.

Option	Purpose
T	To position the cursor at the top of the report.
B	To position the cursor at the bottom of the report.
F	To display a window that allows you to enter a word or group of words to search for within the document. Since this feature is case sensitive, use proper upper and lower case when typing in the word to be found. All occurrences of the word are found. You are also able to view the next occurrence or previous occurrence by selecting the <b>Next</b> or <b>Prev</b> buttons in the search box.
G	To display a window that allows you to type the page number you wish to view.
U	To scroll up one page.
D	To scroll down one page.
C	To cancel or exit the view screen.
Arrow Keys	To move right, left, up, or down to view all of the report.

7. After reviewing the report, type **x** and press **Enter** to return to the menu screen.

## ***Print a Report***

1. At the *Enter desired selection* prompt on any menu, type **spooler** or **SP**, and press **Enter**. The following prompt appears:

Display spool files for (m)yself, (a)ll users, (p)rinter id:

**Note:** To exit this screen and return to a menu screen, press **Enter**.

2. Type **m** to view your reports on the Spooler Manager screen.
3. If you do not see the report you want to print in the first Spooler Manager screen, press **Enter** to scroll through the Spooler Manager screen pages.
4. When you find the desired report, type **s** to stop. The following prompt appears:

Enter (s)croll, (v)iew, (p)rint, (j)ob, (d)elete or (t)otal space

5. To print a specific report, type **p** and press **Enter**.

**Note:** To return to a menu screen instead of printing the report, press **Enter** twice.

### **WARNING**

Do not delete any report or job.

6. At the job number prompt, type the appropriate job number from the left column.
7. At the page range prompt:
  - At **From**, type the first page desired
  - At **To**, type the last page desired.
8. At the *Delete upon completion? (Y/N)* prompt, type **n** and press **Enter**.
9. At the *Enter form/printer to be used* prompt, type the printer number and press **Enter**.
10. At the *How many copies do you want?* prompt, type the number of copies needed and press **Enter**.

**Note:** Pressing **Enter** returns you to the Spooler Manager screen.

## **Using Open Screens**

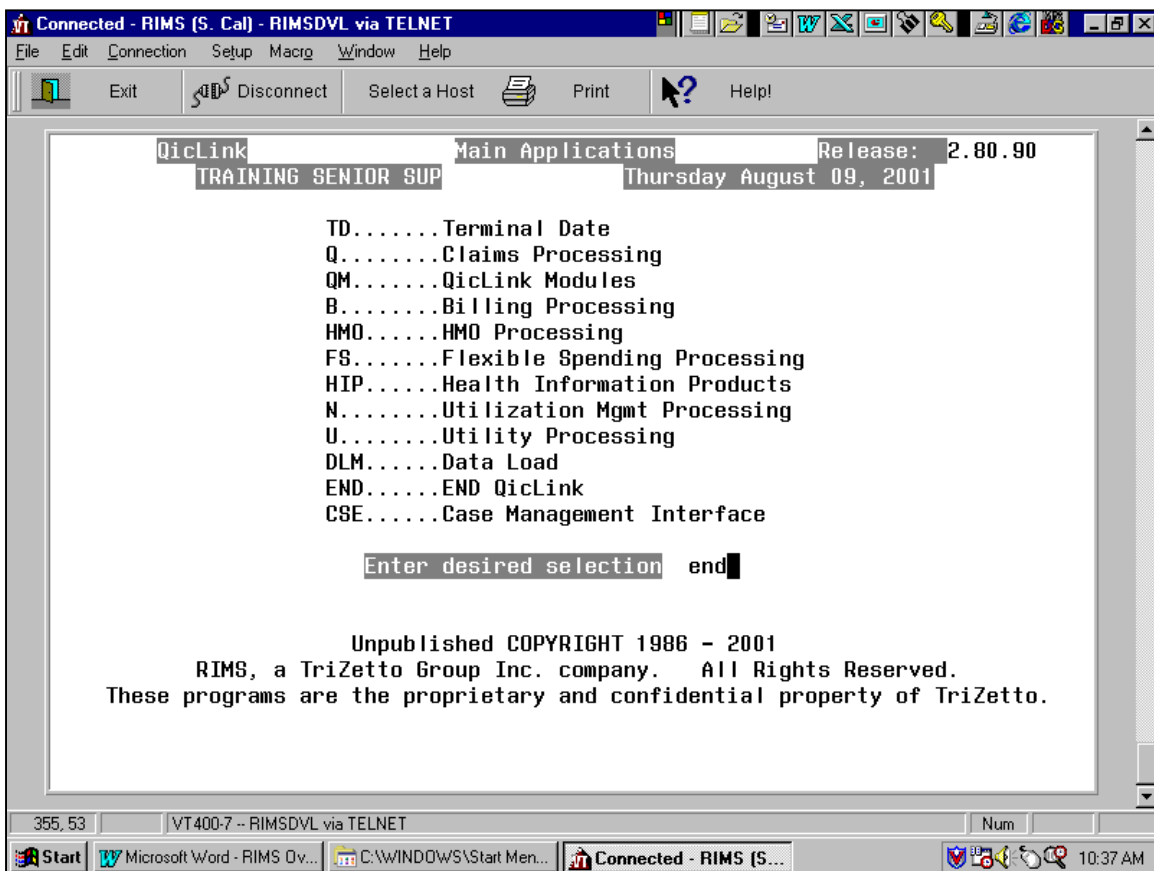
When one person is working on a group, member, or claim screen, other team members are not able to work on the same member or group. It is important to complete screens as soon as possible to free the group or member records for others.

When you need to leave your desk, make sure you complete the screen. Also sign out of the screen and move to a menu screen. Even though you have completed a screen, the system may not have released the group or member record for others to work on. Moving to a menu screen ensures release of the record and provides extra security.

## Signing off PMS

When you have completed work on PMS, it is important to sign-off the system properly. Improper sign-off of the system slows system response time. To sign-off PMS, follow these steps:

1. Go to any menu screen.
2. Type **end** at the *Enter desired selection* prompt as shown below.



```
Connected - RIMS (S. Cal) - RIMSDVL via TELNET
File Edit Connection Setup Macrg Window Help
Exit Disconnect Select a Host Print Help!
QicLink Main Applications Release: 2.80.90
TRAINING SENIOR SUP Thursday August 09, 2001

TD.....Terminal Date
Q.....Claims Processing
QM.....QicLink Modules
B.....Billing Processing
HMO.....HMO Processing
FS.....Flexible Spending Processing
HIP.....Health Information Products
N.....Utilization Mgmt Processing
U.....Utility Processing
DLM.....Data Load
END.....END QicLink
CSE.....Case Management Interface

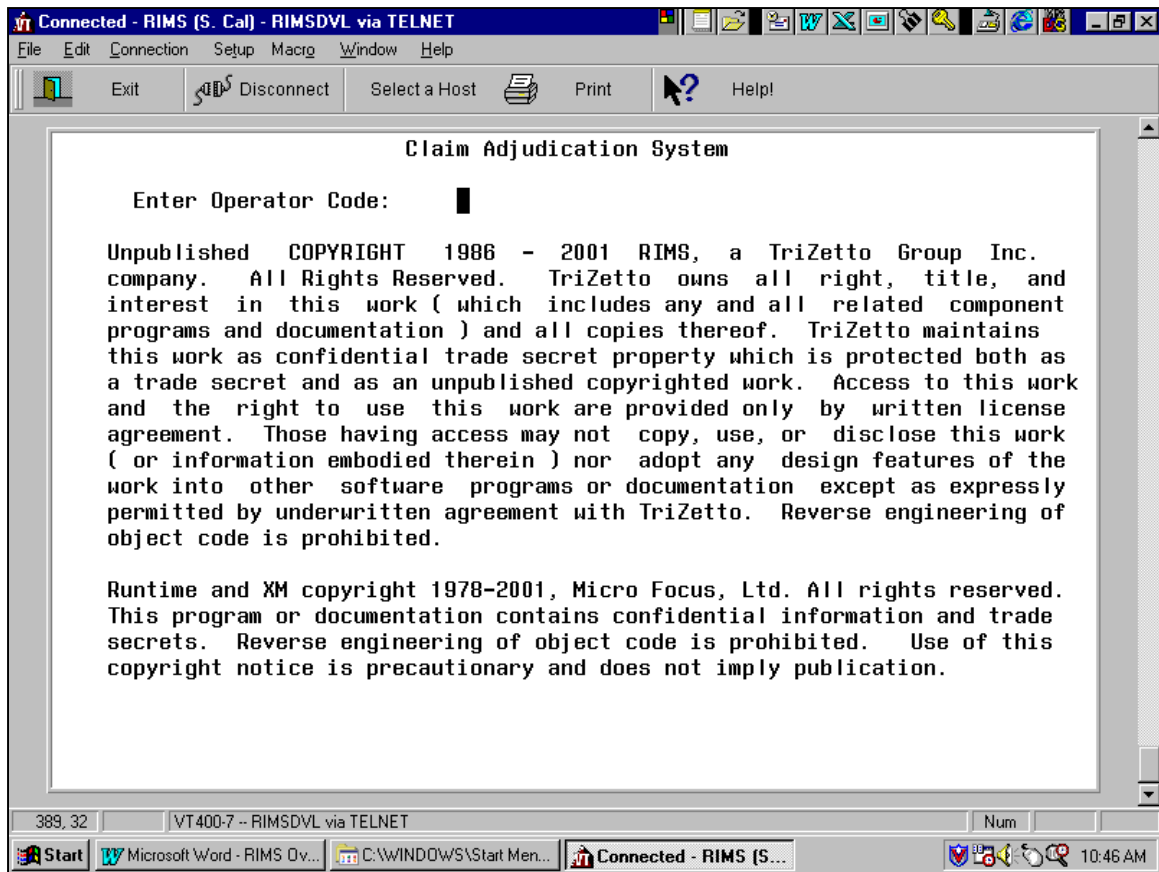
Enter desired selection end

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These programs are the proprietary and confidential property of TriZetto.
```

Main Applications (Z) Screen – Signing off PMS

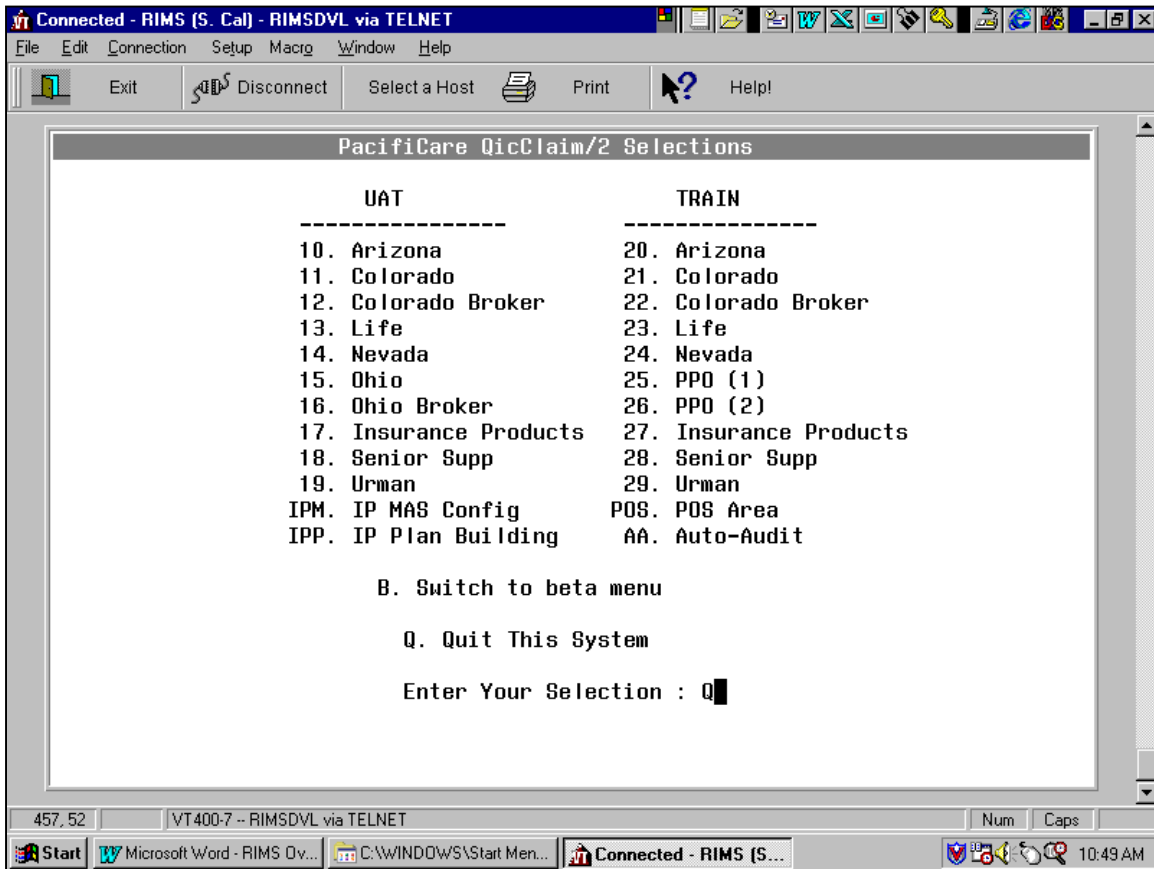
After typing **end**, the system returns you to the Operator Code sign-on screen.

3. At the *Enter Operator Code* prompt, type the word **end** and press **Enter**.



Enter Operator Code Screen – Signing off PMS

After typing **end**, the Main Frame QicClaim/2 Selections screen appears.



Main Frame QicClaim/2 Selections Screen – Signing off PMS

Type **Q** at the *Enter Your Selection* prompt. The screen changes to display the following message:

<Your 'TELNET' connection has terminated>

**WARNING**

Do ***not*** press **Enter** again. If you press the Enter key again, the system reconnects to the TELNET host. If you are reconnected, you must re-sign on and re-sign off the system.

4. Once the TELNET connection is terminated, either click the **Exit** button on the toolbar or the ☒ in the upper right-hand corner of your Windows desktop.