

Health Financial Systems 8109 Laguna Boulevard Elk Grove, CA 95758

#### TEL 888.216.6041

### Compu Max IRIS to HFS IRIS data migration

You will need to be registered HFS user, if you are a new user and do not have a username or password, follow this link to register: <u>https://www.hfssoft.com/newuser</u> or from the <u>hfssoft.com</u> website click on "Sign in" and then click on the "Join Us" link to register as a new user and obtain a username and password.

When creating your login credentials please associate your login with HFS Account Name.

After creating your login credentials, please allow the system a little time to associate your login with the appropriate downloads.

The installation will probably require the assistance of the IT department.

You need the full install of HFS IRIS, and you need to apply the appropriate Patch Download of the Compu-Max IRIS.

You want to do the IRIS Full Download as a new install.

IRIS (IRIS) 6.16 03/01/2021 System Notes Full Download

After installing the above IRIS product use File Explorer and navigate to:

C:\Program Files(x86)\Health Financial Systems\IRIS Setup

Right click on the above folder IRISSetup and adjust the permissions for the "Users" group to Full Control.

# PHealth Financial Systems

Here is what it looks like after setting Full Control on my computer: C:\Program Files (x86)\Health Financial Systems\IRISSetup

→ This PC → quinn10 (C:) → Program Files (x86) → Health Financial Systems							
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2)	-		Group or user nam	es:			
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Files (x86)							
				0	K Cance	Ap	ply

After adjusting the permissions as shown above start the IRIS system with the green



icon on the desktop:

Click on the Data Management tab at the top of the screen. Click on School Code on left side of screen. list of schools should display. Click on "Print" at top of School Codes list. A Print Preview of the School codes should display.

If print preview does display the IRIS system is ready and you can ignore the next step.

Proceed to applying the Patch Download to the GME system

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If the Print Preview does not display. Return to the Setup folders and run.

crruntime\_32bit\_13\_0\_6.msi

Located in the Crystal Report 32 Bit folder.

Additional resources: IRIS manuals can be found on our web site at:

https://www.hfssoft.com/product/92

Scroll down to "Manuals & Guides" on right hand side of page.

A recorded Webinar covering IRIS can be found at:

https://www.hfssoft.com/webinars/webinars/

Patch Download to GME system.

You will also want to download the Patch Download for the Compu-Max IRIS because the current version 3.9.0.0 has a function to export all the previous year data for import to HFS IRIS.

The "Patch Download" will download a "GME\_Patch.zip".

"GME\_Patch.zip" contains two updates, one is for the 64-bit version of the GME system, the other is for the 32-bit version of the GME system (GME2014):

GME64UPD.EXE – Apply if you have the 64-bit version of Microsoft Access, files will be extracted to typically C:\GME64.

GME2014UPD.EXE – Apply if you have the 32-bit version of Microsoft Access, files will be extracted to typically C:\GME2014.

You are now ready to migrate data from Compu-Max IRIS to HFS IRIS. To Migrate: Start the Compu-Max IRIS (GME) system.

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### A message will display indicating end of support for Compu-Max IRIS:



#### Click Ok

The system will open normally, on the main menu go to:

#### IRIS -> Create Dbase (DBF) files for Import to HFS-IRIS

	F	lealth Fina	ncial Systems -	Graduate N	ledical Edi	ucation 64 l	3it V 3.9.0.0
File GME Functions Help $ ho$ Tell me what you	u want to do						
File - Tools - 🛛 🖬 🖬 💉 🕈 🛅 🔍 🕮 F	TE 🗟 😁 🔎 🖡		D 📴				
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Import IRIS Data	bars						
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Import IRIS Data from Comma Delimited File	Mid	Suffi	x 🔽 C	reated 9/1	5/2020		
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- Data Migration from legacy GMEDATA.MDB		ation Date	(0verlap)	EYB -	- F/P %	GME ETE	WE
Create Excel Import Template	.00%	1	No	1/1/2020	100.00%	.166	7
Import IRIS Data from Excel Template			No				
Run IRISEDV3							
Run IRIS Data Evaluation (May be used in place of IRISEDV3)							
Create Export Files to mport to HFS-IRIS							
Create Consolidated CSV Files for Import to HFS-IRIS							
Create Dbase (DBF) files for Import to HFS-IRIS							
Record: H 4 1 of 1 + H +* No Filter Search	•						Þ

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The system will create the IRIS files for import into a folder named DBFImports. You will be prompted with the following message for each year created:

Overwrite		×
IRIS Files for provider 140	634 already exis	t, overwrite?
	Yes	No

The above message will appear for each fiscal year that is in the system. Click Yes, each time the above message appears.

When the export is complete as "Success" message will display, and you can view the files:

Export Su	uccess! View Files to be imported to HFS-IRIS?	×
?	The following DBF export files were created: Files are located at: C:\Users\jwquinn\OneDrive\OneDrive - HFS\Documents\HFS_Products\HFS-GME64\DBFImports	
	Yes No	

Take note of the folder location as it will be needed for the next step:

Import IRIS data into HFS IRIS



Start the IRIS system with the icon on the desktop

Click on the "Data Management" tab at the top of the screen. Click on Import IRIS Data. Click on the Batch Import command button. Click Yes to the Database Confirmation message. Click Import folder to set the location of the DBfImports folder with the files for import. Click Process File

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Version: 6.16.0.0	Resident Information System	Health Financial Systems	
Home Data Import/Export Data	Management Interns Reports Help Click Import IRIS Data Import/Export Data		
Export CMS IRIS Data	IRIS Import File Manager       Export CMS IRIS Data       Export Special Report       Import OIG       Chan         IRIS Import File Manager       Click Batch Import	ge Database	
Export Special Export	Single DBF File Set Single XML File Set Consolidated File Set	Batch Import	
Change Database	Import a dbf single file set Import a xml single file set Import a single consolidat into the IRIS database. into the IRIS database. file set into the IRIS database. Click Import Folder and set location of DBFImports f	ed Import a selected folder of file see. sets into the IRIS database. Older	
▲ View Data	IRIS CMS Batch File Set Data Import		
Error Codes Providers	C:\Docs\HFS_Products\HFS-GME64\DBFImports  Process File		
Residency Code	>  Step 1 - Pairing > Step 2 - History >>> Step 3 - Add Date >>> Step 4 - System	n Update >	
Track Changes	Batch Processing Activities Click Process File to Import all files from D	DBFImport folder	
▲ Delete Data	Batch Transaction Log Detail		

### When you click Process File and Confirmation will display:

Confirmation	×
The batch is now ready to start autor several minutes. No further input wil Cancel to exit the batch.	mated updates which can take II be required. Click OK to start or
	OK Cancel

#### Click Ok The process will import the data. When complete

Patch Import has been	completed
batch import has been	completed.
	ОК
	000050

A Report listing files processed will be displayed:

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NOTICE: Providers are advised to review accepted assignment records which may require corrections. The reason is that the HFS IRIS Import Data Evaluation Procedure does not reject zero values in the "TIMEPERC", "IMEPERC", "GMEPERC", and "ARESYEAR" data fields in the imported assignment file. As such providers may make corrections to one or more of these fields in the assignment file or even make corrections to the "RESYEAR" data field in the imported master file.

<b>ệ</b> Health Financia	Intern	Resident Info	ormation System (IRIS)	Version Number Date Time	6.16.0.0 Thursday, April 1, 2021 11:05:58AM		
Batch Import Summary Report							
File Name	Provider Number	FYB	FYE	Status Message			
M 2020-05-31 M 2009-12-31		6/1/2019 1/1/2009	5/31/2020 12/31/2009	Files processed OK Files processed OK			

IRIS is ready to use.

For questions or assistance

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