Group Outreach and Education

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Introduction

The SHIP Tracking and Reporting System (STARS) is the nationwide, web-based data system that facilitates reporting of SHIP activities. STARS allows all SHIP team members to enter SHIP activities into STARS. This job aid provides step-by-step instructions for entering Group Outreach and Education activities. It is meant to be used in conjunction with the STARS User Basics job aid, which explains how to log in, retrieve passwords, and more.

STARS Landing Page: https://stars.entellitrak.com

We recommend you bookmark the STARS landing page for your convenience. You must have user credentials to successfully log into STARS.

Find Other Training Materials

The STARS home page contains links to all available STARS job aids, recorded webinars, and, when it's available, the STARS manual, which will contain detailed program guidance from ACL (like the SHIP NPR manual).

Data Entry Steps

When entering data in STARS, you should move through the form by using the Tab key on your keyboard or by clicking through the fields using your mouse. If you press the Enter key, STARS will think you are trying to Save and will notify you of the yet-to-be completed fields. Also, STARS identifies fields where an entry is required (R) with a small red R.

Tracking Inbox

Upon login, look for Tracking Inbox in the main menu. All data entry actions are contained within the Tracking Inbox.

1. Select *Group Outreach And Education*.

2. The term "NEW" will appear. Click on "NEW."
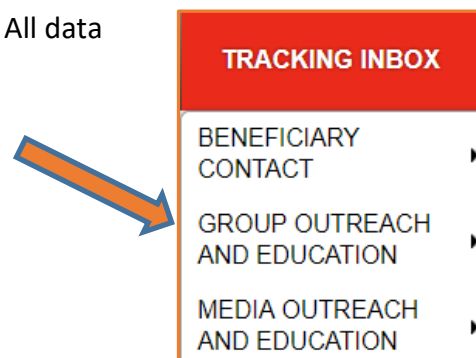
MIPPA and SMP

The first decision you must make is whether this group outreach activity is also related to your MIPPA work (if you are involved with the MIPPA program) and/or your SMP work (if you are involved with the SMP program). By default, STARS marks "No" for each of these choices. Click "Yes" if appropriate. Otherwise, do nothing.

MIPPA	○ Yes ● No 🅡
Send to SMP	○ Yes ● No

⭐ **MIPPA Note:**

STARS is also the MIPPA data reporting system. If you work with the MIPPA (Medicare Improvements for Patients and Providers Act) program, MIPPA qualifying *Target Beneficiary Group* and *Topics Discussed* are explained in this document, including in Appendix B.

Send to SMP Note:

SIRS is the data system used by Senior Medicare Patrol (SMP) programs. SIRS and STARS are connected. If you are a SIRS user, you will now enter data in STARS and then send it to SIRS, with the exception of complex interactions. Beneficiary contacts that become complex interactions are finalized in SIRS. If you work with the SMP program, further instructions will be provided by the Administration for Community Living (ACL) and the SMP National Resource Center later in 2018.

STARS ▸ SIRS

⭐ **Send to SMP.** Upon login, STARS will recognize whether the STARS user is also a SIRS user. Below is an example with an auto-filled SIRS eFile ID. If you do SMP work and your SIRS eFile ID does not appear, contact your supervisor. If you are entering forms on behalf of another SIRS user you should enter that person's valid SIRS eFile ID in this box to send the form to SIRS.

- **(!) Important:** If saved data must be corrected or updated later, it must be edited in <u>both</u> systems. STARS group outreach and education form *updates* do not transfer from STARS to SIRS; only the *initial* saved record transfers.

Send to SMP	● Yes ○ No
SIRS eFile ID	1671

Reference Number

STARS will assign a *STARS reference Number* and, if appropriate, a *SIRS Reference Number* <u>after you have saved</u> the group outreach and education form. At this stage of data entry, these fields will be blank. Later, the *SHIP Reference Number* will also be known as the SHIP Case Number on the Tracking Inbox.

SIRS Reference Number	
SHIP Reference Number	

Session Conducted By

Session Conducted By defaults to you. If you are entering a group outreach and education made by another STARS team member, use the drop down list to select the appropriate team member.

Session Conducted By	SHIP QATestPaulson ▾ ®

Partner Organization Affiliation (not pictured) will automatically appear based upon the associated team member profile.

Time Spent

Time spent can be entered in hours and/or minutes. Your entries in each field must be whole numbers. The time spent entered in the hours and minutes fields automatically calculates into total minutes in the required time spent field. In the example below, the beneficiary contact was 1 ½ hours, entered at 1 hour and 30 minutes in their respective fields. STARS calculated the time spent as 90 minutes.

Time Spent in Hours	1
Time Spent in Minutes	30
Total Time Spent (minutes)	90 ®

⭐ **Note to users of STARS and SIRS (for SMPs):** Though STARS sends data to SIRS, the time spent cannot be divided between the SHIP and SMP content of the group outreach and education. Enter the entire time spent in a given group outreach and education into STARS. ACL accepts that the entire time spent on an interaction will be counted in both STARS and SIRS.

Event Description

There are several fields dedicated to describing the type of event, and most are required.

- *Title of Interaction* and *Number of Attendees* are text fields. Type in your answers.

Title of Interaction	®
Type of Event	▾ ®
Number of Attendees	®
Start Date of Activity	03/31/2018 🗓 (mm/dd/yyyy) ®
End Date of Activity	🗓 (mm/dd/yyyy)

- *Type of Event* – select the best choice from the drop down list of options.

Booth or Exhibit (Health Fair, Senior Fair, or Community Event)
Enrollment Event
Interactive Presentation to Public (In-Person, Video Conference, Web based Event, Tele Conference)

- *Start Date* is Required *(R)*, whereas *End Date* is not. Click on the calendar icon to select the date or manually enter the date in the field provided. If you choose the latter method, months and days must be entered using 2-digits (i.e. 01 for January, 01 for the first day, and so on).

Event Location

There are three required fields dedicated to location. When you enter a *Zip Code of Event*, the *County of Event* auto-populates. The *State of Event* auto-populates. In the example below, 22193 was entered as the zip code for a sample user in the state of Virginia. That zip code correlates to Prince William County.

State of Event	Virginia ▼	ℝ
Zip Code of Event	22193	ℝ
County of Event	Prince William - VA ▼	ℝ

Event Contact Information

None of the Event Contact information is required in STARS. Check with your supervisor about state and local SHIP program requirements for these fields.

Event Contact First Name	
Event Contact Last Name	
Event Contact Phone Number	
Event Contact Email	

Demographics and Topics Discussed

Check all that apply for each of these three questions, selecting from the checklists provided. Use the scroll bars to see the full array of answer options for each.

⭐ **MIPPA Note:**

MIPPA-qualifying options in the *Target Beneficiary Group* are:
- Low Income
- Rural

MIPPA-qualifying *Topics Discussed* are:
- Extra Help/LIS
- Medicaid
- MSP
- Preventive Services

Intended Audience
- ☑ Beneficiaries
- ☐ Employer-Related Groups
- ☑ Family Members/Caregivers
- ☑ Limited-English Proficiency
- ☑ Medicare Pre-Enrollees
- ☐ Partner Organizations
- ☑ People with Disabilities
- ☐ Rural Beneficiaries

Target Beneficiary Group
- ☐ American Indian or Alaskan Native
- ☐ Asian
- ☑ Black or African American
- ☑ Disabled
- ☑ Hispanic/Latino
- ☐ Languages Other Than English
- ☐ Low Income
- ☐ Native Hawaiian or other Pacific Islander
- ☐ Rural
- ☐ Other
- ☐ Not Collected

Topics Discussed
- ☐ Duals Demonstration
- ☐ Extra Help/LIS
- ☐ General SHIP Program Information
- ☑ Long-Term Care Insurance
- ☐ Medicaid
- ☑ Medicare Advantage
- ☐ Medicare Fraud and Abuse
- ☐ Medicare Part D
- ☑ Medicare Savings Program
- ☐ Medigap or Supplemental Insurance
- ☐ Original Medicare (Parts A and B)
- ☐ Other Prescription Drug Coverage
- ☐ Partnership Recruitment

Special Use Fields

The Special Use Fields are not required in STARS. Talk with your supervisor about how the Special Use fields are being used in STARS for your SHIP program.

Special Use Fields	
Field 1	
Field 2	
Field 3	
Field 4	
Field 5	

Notes and Uploaded Files

It is not required by STARS that you enter notes or upload files. Talk with your supervisor about whether and how the *Notes* and *Attach Files* fields are being used in your SHIP program. Uploading files into STARS works similarly to attaching a file to an email. Click *Browse* to select the file of choice from your computer. In the example below, a file has been uploaded in the first "Attach File" field. An example of what an attached file looks like is shown in the first Attach File field (the path and file name appear in black).

Notes	Enter notes here
Attach File	C:\fakepath\STARS User Basics J Browse
Attach File	Browse
Attach File	Browse
Attach File	Browse
Attach File	Browse
	Save Spell Check

Note: STARS offers a Spell Check feature for use with the open-ended data fields. Click Spell Check and follow the on-line prompts. It works just like a typical spell checker in other software programs you are likely to be familiar with.

Save Your Work

Save

When you press the blue Save button, your Group Outreach and Education activity will be successfully saved; Or, you will be prompted to complete any required fields that you neglected.

Required Fields Prompts: Here is a list of the prompts that will appear for the required fields, if you neglect to provide answers for any of them:

Tracking Inbox » New Group Outreach and Education »

- Total Time Spent (minutes) is business required.
- Title of Interaction is business required.
- Type of Event is business required.
- Number of Attendees is business required.
- County of Event is business required.
- Intended Audience is business required.
- Target Beneficiary Group is business required.
- Topics Discussed is business required.

Successful Save: A confirmation indicating a successfully saved SHIP Group Outreach and Education activity briefly appears on your screen.

Saving SHIP Group Outreach and Education...
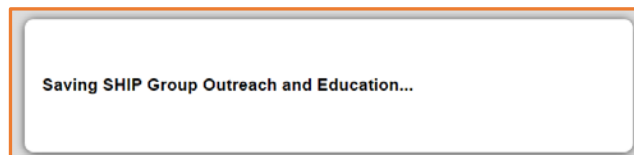
Even if you were looking down or away when the confirmation briefly appeared, you can know that your Group Outreach and Education entry successfully saved if you see your entry on the screen with an absence of any required fields prompts like the examples at the top of this page. Also, upon successful completion, STARS gives you the option to **Print Full Data PDF**. This will appear in the upper right corner of your screen.

🖨 Printer Friendly Format

Print Full Data PDF
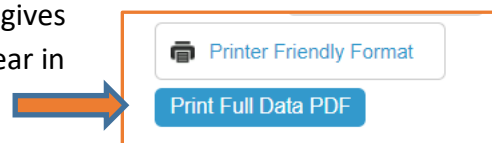
Another clear indication of a successfully saved Group Outreach and Education entry is that you will see the Additional Team Members tab appear.

Additional Team Members

You can enter additional Team Members for the same Group Outreach and Education activity using the *Additional Team Members* tab.

Group Outreach and Education   Additional Team Members

1. Hover your mouse here

2. Click here

New Additional Team Members
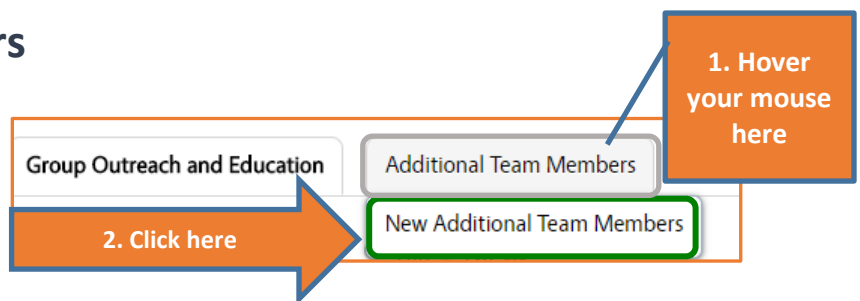
1. **Hover** your mouse over the *Additional Team Members* tab.
2. The ***New Additional Team Members*** option will appear. Click on it.

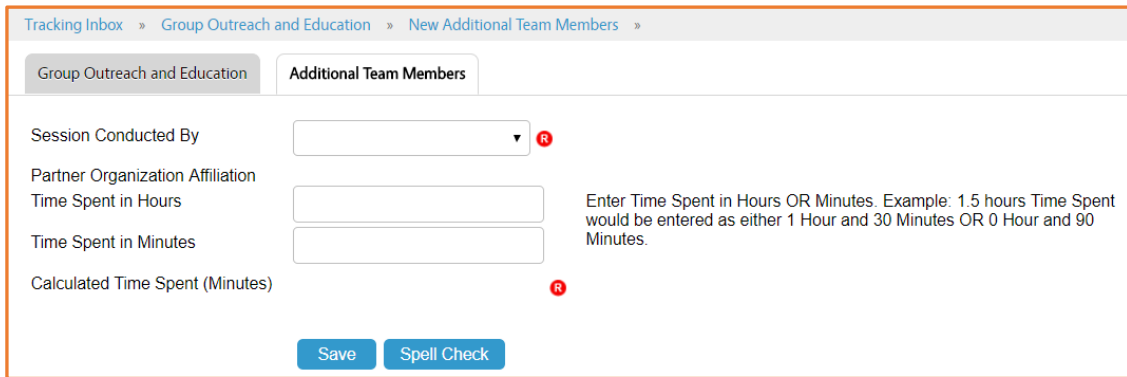- Complete the short series of data entry fields for any additional team members who participated in this Group Outreach and Education (GOE) event. Click Save when you are done.
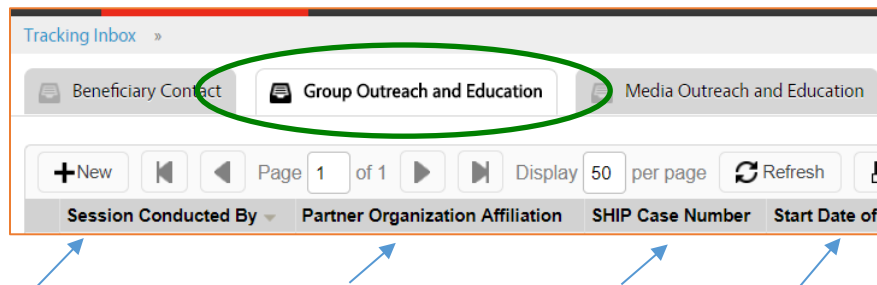
(!) **Important note to user of STARS and SIRS (for SMPs):** Additional Team Member details will not transfer from STARS to SIRS; only the *initial Session Conducted By and Time Spent values* saved will transfer. Log into SIRS to add additional team members to the GOE form.

Updating or Editing Previous Forms

Group Outreach and Education entries can be updated and edited following the instructions provided in this job aid.

1. Go to your Tracking Inbox and select the Group Outreach and Education tab (circled).

2. Click the column headings within your Tracking Inbox to sort the entries in ascending or descending order (not all are pictured). Click within any entry on the list and it will open. Edit the desired fields and save.

Reminder to SIRS Users: STARS Group Outreach and Education form *updates* do not transfer from STARS to SIRS; only the *initial* saved record transfers. If saved data must be corrected or updated later, it must be edited in both systems.

Appendix A: Technical Assistance

Where you should go for individual technical assistance will vary, depending upon your issue or need. Here is a decision-making guide.

- **Your SHIP program leaders:** Data reporting processes vary by SHIP. For questions about how STARS is being managed by the SHIP in your area, contact your supervisor or leadership for your SHIP program.

- **Booz Allen Hamilton (a.k.a. "Booz Allen"):** For technical assistance, such as for difficulties with usernames and passwords, contact the Booz Allen STARS help desk at boozallenstarshelpdesk@bah.com or 703-377-4424.

- **SHIP National Technical Assistance Center (SHIP TA Center):** The SHIP TA Center provides webinar training, technical assistance, and written job aids on STARS.

  - Links to SHIP TA Center and ACL STARS resources are available to all STARS users on the STARS landing page

  - All STARS resources are also housed in the password-protected SHIP Login area of the SHIP TA Center website: www.shiptacenter.org, but only for SHIP directors and administrators during the roll-out period. This will change in October 2018.

    - Requests for access to www.shiptacenter.org are managed by SHIP leaders at the state and local level.

  - For questions about these steps or other STARS support resources, contact the SHIP TA Center, stars@shiptacenter.org or 877-839-2675.

- **SIRS (SMP Information and Reporting System) Support:**

  - *Help using SIRS:* SMP National Resource Center; Sara Lauer, SMP Resource Center; SIRS@smpresource.org; 319-874-6859

  - *SIRS technical issues and password reset assistance:* Booz Allen Hamilton Help Desk; 703-377-4411 or BoozAllenSIRSHelpDesk@bah.com

- **Reminder: For online information about STARS**: Follow the links under "Need Help with STARS?" on the STARS landing page.
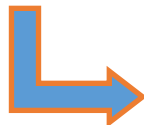
Log into STARS

Need Help with STARS?
- STARS manual, job aids, and support resources: SHIP TA Center
- STARS technical issues or questions: Contact the Booz Allen STARS Help Desk

Appendix B: Definitions from ACL

Group Outreach and Education (GOE)

MIPPA Contact

The Medicare Improvements for Patients and Providers Act (MIPPA) Contact radio button defaults a 'no' response. Select the 'yes' radio button if the SHIP team member conducts outreach with a Target Beneficiary Group listed below and one or more of the Topics Discussed:

Target Beneficiary Group	*Topics Discussed
Low Income	Extra Help/LIS
Rural	Medicaid
	MSP
	Preventive Services

* Counts as a MIPPA contact if the Target Beneficiary Group for the outreach is Low Income or Rural and one or more of these topics were discussed. (Topics Discussed definitions follow later in this document.)

Send to SMP

The *Send to SMP* radio button defaults a 'no' answer. To send a form to SMP database, known as the SMP Information and Reporting System (SIRS), requires the all following:

1. Select the 'yes' radio button associated with *Send to SMP*.
2. The SHIP properly trained and state certified SHIP Team Member listed in the *Session Conducted By* field is a trained SMP team member with a valid SIRS efile ID.
3. The valid SIRS efile ID appears in the corresponding text box. *Note: When conducting data entry on behalf of another team member, be sure to enter the other team members eFile ID and select their name in the Session Conducted By dropdown.*
4. Note: All topics on the Group Outreach and Education (GOE) form are SMP Qualifying Topics Discussed.

Time Spent

Count time spent preparing for the event (creating, practicing, or updating presentations; copying materials; organizing; etc.), travel time (to and from the event), and time spent attending the event. When an event involves multiple team members, enter the full amount of time each team member spent using the "Additional Team Member" tab connected to the saved Group Outreach and Education Form.

Event Information

Field	Definition
Session Conducted By	Auto-populates with the name of the user logged into STARS. Use the dropdown arrow to select the appropriate team member when entering contacts on another's behalf.

Partner Organization Affiliation	Auto-populates after the form has been saved based on the *Organization Affiliation* assigned in the profile of the team member listed in the *Session Conducted By* dropdown box.
Zip Code of Session Location	Enter the five-digit zip code of the properly trained and state certified SHIP Team Member's physical location at the time the counseling session occurs. *NOTE: If the event location zip code is not available, the team member (with approval from their supervisor) may use a default zip code for the county in which the event occurred, as a proxy entry, for the real zip code.*
State of Session Location	Auto-populates based on the state assigned in the profile of the team member listed in the *Session Conducted By* dropdown box.
County of Session Location	Auto-populates based on the *Zip Code of Session Location*.

Group Outreach Type

Field	Definition
Booth or Exhibit (Health Fair, Senior Fair, or Community Event)	Select this option when an event includes general or program-specific information, and/or printed fact sheets are shared with or distributed to the public. The purpose of SHIP program participation in such events is to inform the public about the availability of SHIP services in their area. For example, some SHIPs attend health or senior fairs or set up information booths in shopping centers to increase that community's awareness of their services and of the need for individual counseling.
Enrollment Event	Select this option for any type of program where enrollment is the key objective and where volunteers or staff are on hand to help the beneficiary submit an application online or by paper. An enrollment event may be either solely sponsored by a SHIP or sponsored in partnership with another organization such as Social Security Administration (SSA) office.
Interactive Presentation to Public (In-person, Video Conference, Web based Event, Tele Conference	Select this option when events includes in-person presentations, forums, speaking engagements, or seminars during which substantive knowledge on Medicare or the SHIP program is transferred by oral and visual means from a SHIP presenter to those individuals attending the presentation. Interactive means that there is an opportunity for attendees to ask questions of the presenter at the event. This does not include counselor trainings, booths, exhibits, satellite broadcasts, or video

Audience

Field	Definition
Beneficiaries	Check this box if current Medicare beneficiaries are part of the intended audience.
Employer-Related Groups	Check this box if employer-related groups are part of the intended audience (i.e. active or retired employee groups, human resources departments).
Family Members/Caregivers	Check this box if family members or caregivers of current Medicare beneficiaries are part of the intended audience.

Limited-English Proficiency	Check this box if Medicare beneficiaries with Limited English Proficiency are part of the intended audience.
Medicare Pre-Enrollees	Check this box if those nearing Medicare eligibility are part of the intended audience.
Partner Organizations	Check this box if partner organizations are part of the intended audience.
People with Disabilities	Check this box if persons with disabilities either currently enrolled in Medicare or nearing Medicare eligibility are part of the intended audience.
Rural Beneficiaries	Check this box if rural dwelling current Medicare beneficiaries are part of the intended audience.
Other	Check this box to indicate an intended audience other than those listed.
Not Collected	Check this box to indicate there is no intended audience.

Topics Discussed

Listed below are descriptions of most of the SHIP-related topics discussed during a Group Outreach Event. Team members should select the boxes for all topics that apply. If, for example, a team member discusses Medicare Advantage and Medicaid, then both boxes should be selected.

Field	Definition
Duals Demonstration	Check this box to indicate providing information about dually enrolled in Medicare and Medicaid beneficiaries which may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, marketing/sales complaints/issues, quality of care, and plan non-renewal.
Extra Help/LIS	Check this box to indicate providing information about the Extra Help/LIS program. This may include eligibility explanation/screening, benefit explanation, claims/billing, appeals/grievances, fraud and abuse, or marketing/sales complaints/issues.
General SHIP Program Information	Check this box to indicate providing general information about the SHIP program.
Long-Term Care Insurance	Check this box to indicate explaining LTC insurance. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, and marketing/sales complaints/issues.
Medicaid	Check this box to indicate discussion of Medicaid coverage. This could include discussion of Medicare cost sharing, long term services and supports (LTSS), home and community based services (HCBS), long-term care (LTC), etc.

Medicare Advantage	Check this box to indicate discussion of Medicare Advantage coverage. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, and marketing/sales complaints/issues.
Medicare Fraud and Abuse	Check this box to indicate discussion of Medicare Fraud and Abuse.
Medicare Part D	Check this box to indicate discussion of Medicare Part D coverage. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, plan nonrenewals, and marketing/sales complaints/issues.
Medicare Savings Program	Check this box to indicate discussion of the Medicare Savings Programs (QMB and SLMB). This may include eligibility explanation/screening, benefit explanation, claims/billing, appeals/grievances, and fraud and abuse.
Medigap or Supplemental Insurance	Check this box to indicate discussion of Medigap or Supplemental Insurance coverage. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, and marketing/sales complaints/issues.
Original Medicare (Parts A and B)	Check this box to indicate discussion of Original Medicare Parts A and B coverage. This may include eligibility explanation/screening, benefit explanation, enrollment/disenrollment, claims/billing, appeals/grievances, and fraud and abuse.
Partnership Recruitment	Check this box to indicate targeting new partners.
Preventive Services	Check this box to indicate discussion of Medicare Preventive Services coverage. This may include eligibility, benefit explanation, claims/billing, appeals/grievances, and fraud and abuse.
Volunteer Recruitment	Check this box to indicate targeting new volunteers.
Other	Check this box to indicate a topic discussed not included in the list.