

STARS Launch

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Introduction

This job aid provides an overview of the 2018 launch of the new SHIP Tracking and Reporting System (STARS), which will replace SHIP NPR by the end of the year. The intended audience for this Job Aid is SHIP directors and other leaders within the SHIP network.



About STARS

The SHIP STARS data system is the nationwide, web-based data system that facilitates the reporting of SHIP activities. It was developed to offer a modernized and improved user experience for SHIPs as they work to provide Medicare beneficiaries with information, counseling, and enrollment assistance. It is built on the *entellitrak* cloud based software platform.

 **Go to STARS:** <https://stars.entellitrak.com>

STARS is supported by the Administration for Community Living (ACL), system developer Booz Allen Hamilton, and the SHIP National Technical Assistance Center (SHIP TA Center).

- For technical assistance, such for difficulties with usernames and passwords, or questions about your STARS hierarchy, contact the STARS help desk at Booz Allen Hamilton, boozallenstarshelpdesk@bah.com or 703-377-4424.
- For more information about STARS, particularly STARS support and resources, visit the link under “Need Help with STARS” on the STARS landing page.
 - For answers to your questions about this job aid or other STARS support resources, contact the SHIP TA Center, stars@shiptacenter.org or 877-839-2675.
- SHIP directors with overarching system implementation questions or programmatic questions can contact their ACL project officer or email ship@acl.hhs.gov.

SHIP NPR to STARS Transition

Roll-Out by SHIP Groups

As announced to the SHIP director listserv prior to the March STARS launch, SHIPs are divided into six groups with [staggered start dates](#). SHIPs who currently enter data directly into SHIP NPR are groups 1 – 3. SHIPs who use a combination of direct data entry and batch uploads into SHIP NRP – i.e. “partial batch” – are groups 4 and 5. SHIPs who currently enter all data directly into a proprietary system with batch upload into the SHIP Performance Reporting (NPR) system are group 6 (i.e. “full batch”). Since the initial STARS launch, some SHIPs

requested to be in a different group, and those requests were approved by ACL and are reflected in this version of the job aid.



- NOTE: Training is being offered throughout the SHIP NPR to STARS transition that will accommodate all SHIP groups during the transition cycle. See the [Training Plan](#).

Differences and Similarities between STARS and SHIP NPR

This table outlines the similarities and differences between STARS and SHIP NPR.

Similarities	Differences
<ul style="list-style-type: none"> • Nationwide, web-based data collection and reporting systems • Facilitates reporting of SHIP activities: <ul style="list-style-type: none"> ○ Beneficiary Contacts ○ Group outreach and education ○ Media outreach • Role-based • Compatible with proprietary data systems • 508 compliant • Facilitates MIPPA reporting • Resource Report • Performance Measures Report • Unique ID with 1-800-Medicare functionality • Availability of a help desk 	<ul style="list-style-type: none"> • More robust search options • Easier to find and edit specific entries • Team member form • User roles can be edited • User names are not email addresses • Send to SIRS functionality for SMP reporting (for co-located SHIP/SMPs) • API data transfer from proprietary systems instead of batch upload • Separate Group and Media forms instead of combined PAM form • Fewer Special Use fields, and the field labels aren't editable • Training and support offered by the SHIP TA Center

Data Migration from SHIP NPR to STARS

All historic SHIP NPR data will be migrated from SHIP NPR to STARS in November 2018, with the exception of team member profiles. Unfortunately, resource limits will not permit team members to be transferred from NPR to STARS. STARS team members must be entered manually into STARS by all SHIPs, including SHIPs who use proprietary systems. See the Team Member job aid for instructions and timelines.

Additionally, all historic SHIP NPR data will only be migrated to the state level. If this information needs to be migrated further down in your [STARS hierarchy](#), contact [Booz Allen Hamilton](#) for assistance.

When Do We Stop Using SHIP NPR?

As each SHIP group reaches its STARS start date, SHIP NPR access becomes “Read Only” and all SHIP data must be entered into STARS. **On November 30, 2018. SHIP NPR will be entirely unavailable.** The 2017 Resource Report (due June 1, 2018) must be entered into SHIP NPR, however. The 2018 Resource Report will be the first officially generated from STARS.

STARS and Proprietary Data Systems

Thirty-two (32) of the 54 SHIPs rely on proprietary systems to transfer some or all of their SHIP performance data into SHIP NPR using “batch upload.” STARS works with SHIP proprietary data systems also, though the process of transferring data from proprietary systems to STARS is called “API,” or Application Programming Interface. API is a “real time” data transfer process. Benefits include:

- Less drain on the data system compared to batch uploads because data is transferring in smaller amounts in real time, not in large amounts on certain days.
- More secure.
- Allows users to see their data in reports in real time rather than waiting until after a monthly batch upload has occurred.

SHIPs who will rely on API data transfer should review the API specifications in [Appendix C](#) for more details.

STARS and the SIRS SMP Data System

Due to key programmatic similarities between the SHIP and Senior Medicare Patrol (SMP) programs, STARS allows system-wide functionality that will support both programs. This is something co-located SHIP/SMPs have requested of their federal administrators at the U.S. Department of Health and Human Services for over a decade. Approximately half of SHIP



and SMP grantees nationally are co-located, and many other SHIP and SMP programs have agreements for co-training team members in SHIP and SMP. This results in some SHIP team members performing SMP activities and vice versa. The SMP data reporting system was also built by Booz Allen Hamilton and is known as “SIRS” (SMP Information and Reporting System).

By sharing a platform, database, and similar workflows, the new SHIP Data System has the potential to reduce data entry redundancy for co-located states and co-trained team members, creating a more efficient user experience and more seamless program collaboration between SHIP and SMP. STARS was designed and matured through a series of interviews with SHIPs that entered data into the SHIP National Performance Reporting (NPR) system, co-located SHIP and SMP grantees, and SHIP grantees using propriety tools. These interviews were used to drive conversations with ACL around their vision for this system and the future needs of the programs, in order to design a tool that will bring value as SHIP and SMP evolve. These conversations culminated in the building of the new SHIP Data System.

Send to SMP functionality

Co-located SHIP/SMP programs will enter most data directly into STARS, and then send it to SIRS. During team member creation, team member SIRS eFile IDs must be entered into STARS (see the Team Member job aid). “Send to SMP” functionality requires both a valid SIRS eFile ID and selecting “Yes” to *Send to SMP*. On the beneficiary contact form, at least one SMP-related topic must also be selected for the data to send successfully.

 NOTE: Upon login, STARS will recognize SMP team members as a SIRS user, as long as an accurate SIRS eFile ID was entered on the team member form. See the Send to SMP button and an example of an auto-populated SIRS eFile ID below:

Send to SMP	<input checked="" type="radio"/> Yes <input type="radio"/> No
SIRS eFile ID	1671

If the SIRS eFile ID was not entered on the team member form, it will not auto-populate the designated field (depicted above). However, the appropriate SIRS eFile ID can be entered manually in the space provided on the beneficiary contact, group outreach, or media outreach forms. This point is also emphasized on other job aids.

Here are some other facts about STARS and SIRS:

- STARS and SIRS users will have separate accounts, so they must be entered as team members within both systems.
- SIRS data does not and cannot transfer to STARS; the directional flow is from STARS to SIRS only:



- Only team members and SMP complex interactions are entered separately into SIRS.

- STARS users and SIRS users have separate user accounts, requiring two sets of log-in credentials. (Single log-in hybrid credentials to grant users access to both systems are not possible.)
- Time spent cannot be divided between the SHIP and SMP content. ACL accepts that the entire time spent on an interaction will be counted in both STARS and SIRS.
- If saved data must be corrected or updated later, it must be edited in both systems. Edits do not transfer from STARS to SIRS.

Like STARS, the SIRS data system is supported by ACL, Booz Allen Hamilton, and the SMP National Resource Center (www.smpresource.org). Need help with SIRS? Here is contact information for a variety of assistance options.

- **Help using SIRS:** Sara Lauer, SMP Resource Center; slauer@smpresource.org; 319-874-6859; SIRS@smpresource.org
- **Questions about SIRS training:** Heather Flory, SMP Resource Center; hflory@smpresource.org; 319-874-6844
- **SIRS technical issues and password reset assistance:** Booz Allen Hamilton Help Desk; 703-377-4411 or BoozAllenSIRSHelpDesk@bah.com

SHIPs and MIPPA Reporting

The new SHIP Data System will also support the Medicare Improvements for Patients and Providers Act (MIPPA) program. MIPPA is a piece of legislation related to Medicare that provides the allocation of federal funding to SHIPs, Area Agencies on Aging (AAAs), and Aging and Disability Resource Centers (ADRCs) to help low-income Medicare beneficiaries apply for programs that make Medicare affordable.

- The forms in STARS allow users to mark whether an interaction should be counted for MIPPA reporting purposes. It immediately precedes the Send the SMP radio button. Whether or not an interaction was MIPPA related is a required field.

MIPPA	<input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> R
Send to SMP	<input type="radio"/> Yes <input checked="" type="radio"/> No

- More STARS MIPPA reporting guidance will be provided by ACL later in 2018.

STARS Training and Resources

The SHIP TA Center acts as the repository of all training and support resources for STARS. The Center provides training webinars and job aids to support all STARS users, including users at the local level, and provides individualized technical assistance on most aspects of the STARS system. Some technical assistance must be provided by Booz



Allen Hamilton, particularly IT assistance with usernames, passwords, and hierarchy related issues. Additionally, ACL maintains a STARS manual based upon the former SHIP NPR manual, and ACL staff STARS subject matter experts will present in most webinars during the roll-out phase.

Training Plan

During the 2018 STARS roll-out, a robust webinar [training plan](#) is designed to provide continuous training for all SHIP groups. The SHIP TA Center will advertise STARS webinars only to SHIP directors and registered SHIP administrator users of the SHIP TA Center's website. It will be up to those SHIP program leaders to redistribute webinar announcements to the appropriate STARS users in their state, commonwealth, or territory.

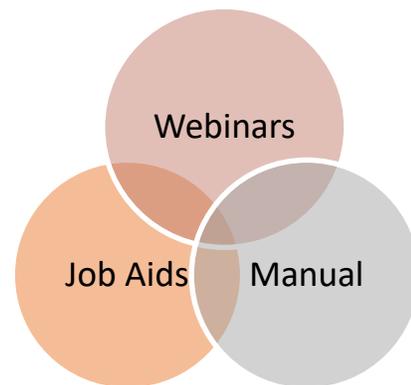
After the 2018 roll-out is complete, the SHIP TA Center will provide periodic webinar training on an on-going basis.

Training Topics

Webinar and job aid topics are aligned, with some topics being relevant for higher-level user roles and others relevant to users whose role is primarily data entry. Training materials are based upon the STARS system specifications and STARS development testing experience. As the system moves into final production and as users begin to use the system, materials will be edited and expanded in response to SHIP feedback.

Here is an initial list of the main topics that will be covered in webinars and/or job aids:

- STARS Launch
- Entering Team Members
- STARS User Basics
- STARS Submitter User Basics
- Beneficiary Contact Form
- Group Outreach and Education Form
- Media Outreach and Education Form
- FAQs
- Search Tools
- Reports



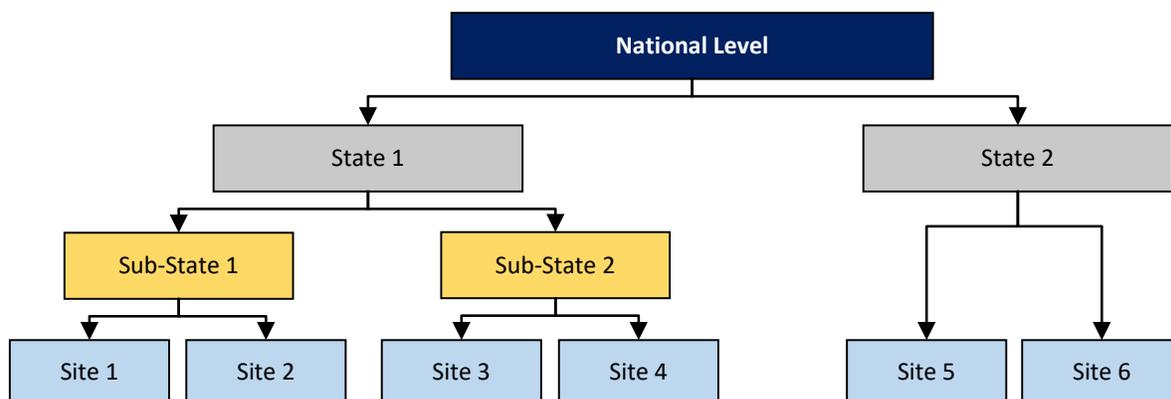
The training plan for the launch phase is designed to accommodate the phased roll-out by groups, the differing needs of users by role, and the differences between SHIPs who will enter data directly into STARS and SHIPs who use proprietary systems.

All STARS support materials will be available to all STARS users through a link on the STARS landing page. Information about STARS at www.shiptacenter.org will be kept at a SHIP director and SHIP administrator level to allow SHIP leaders to control the STARS communication process in their state, territory, or commonwealth.

The chart in [Appendix B](#) depicts planned webinar topics, the intended training group (by STARS user role), and their repetitions. This plan is subject to change, based upon the demands of the roll-out process and lessons learned.

STARS Hierarchy

The data in STARS is organized hierarchically. Each entity within the hierarchy represents an organization. National Level organizations include Booz Allen Hamilton, ACL, and the SHIP TA Center. State level organizations are SHIPs. SHIPs can choose to use a three-level hierarchy, like State 1 in the example below, a two-level hierarchy, like State 2 in the example below, or a state-only hierarchy (no Sub-States or Sites).



The number of Sub-States and/or Sites is determined at the State level. The hierarchy for each SHIP was built into STARS prior to the March 22, 2018 launch, based upon input from each SHIP director.

Each organization is able to access all records associated with their organization and, if applicable, those that sit below them in the hierarchy.

STARS User Roles

There are nine STARS User roles. Roles are hierarchical. Five of the nine roles can create other team members and four can only enter other types of data. Detailed information about team member creation capabilities by role is addressed in the Team Members job aid. An overview of all the roles and in [Appendix D –User Roles Overview](#). Some information from the Team

Member job aid is repeated below to emphasize important points about the 2018 roll-out process.

Sending Login Credentials to Team Members

During the 2018 STARS launch, it is particularly important to remember when it is appropriate to send team members their credentials.

- For SHIPs using API technology, only the SHIP representatives who must enter team members into STARS will need STARS credentials (ie. Username and Password).
- For SHIPs who will be entering data directly into STARS, team member creation can begin 3/22/18; however, the following points are essential:
- **Send Login Credentials - (!) IMPORTANT:** During the roll-out, it may be wise to only send login credentials on or after your group’s start date (unless you are creating a team member whose role is to enter other team members). Alternatively, emphasize to your team members that they must not enter SHIP activities in STARS until your SHIP Start date. [Click here to review groups and STARS start dates.](#)

○ *Not* ready to send credentials? Select **No.** Yes No

○ *Ready* to send credentials? Select **Yes.** Yes No

- **NOTE (!):** Login credentials are sent to the user’s email address in STARS. The team member’s email address is required in STARS if you select “Yes” to *Send Login Credentials*.

Conclusion

Job aids will be developed continually during the early phase of the STARS launch. The STARS User Basics job aid outlines all currently available and planned topics. This and other job aids will be updated regularly (see the footer of each job aid for publication date.)

The production of this job aid was supported by Grant Number 90SATC0001 from the Administration for Community Living (ACL). Though its contents were developed in cooperation with ACL, this document is solely the responsibility of the SHIP National Technical Assistance Center.

Appendix A: STARS Start Dates by SHIP Group

The STARS Roll-Out is organized by group, and there are six SHIP groups. See below for your STARS start date.

Group 1 STARS Start Date

- CT, DC, GU, NC, RI, UT

Group 2 STARS Start Date

- CO, IN, MA, MS, NE, NV, OK

Group 3 STARS Start Date

- IL, KS, MD, OR, PR, VA, VI, WA, WY

Group 4 STARS Start Date

- AK, AR, DE, FL, KY, ME, MO, ND, NJ, NM, TX

Group 5 STARS Start Date

- AZ, HI, LA, NY, OH, PA, SD, TN, VT, WI, WV

Group 6 STARS Start Date

- AL, CA, IA, ID, GA, MI, MN, MT, NH, SC

Appendix B: STARS Training Plan

Webinar Topics	Training Group	Webinar descriptions	Repeats
System Launch Overview	Director/Assistant Director	In this webinar, SHIP leaders will learn more about the timeline, process, and support resources for transitioning from SHIP NPR to the new SHIP data system, STARS. Instructions for getting SHIP team members entered into the system will also be provided. This webinar will not be repeated, so it is important for every SHIP to attend.	Once only, on March 21, 2018. Intended for SHIP directors, administrators, and their designees.
Entering Team Members	Director, Assistant Director, State Staff, Manager roles	In this webinar, SHIP leaders will receive detailed instructions for entering team members into STARS. SHIPs have been divided into groups with STARS "start" dates staggered by group from May 1 through October 1. All SHIP leaders will have access to STARS on March 22 and can begin entering team members in advance of their SHIP's official "start" date. This webinar will be repeated monthly through July.	Offered once monthly through July. Anyone with a role allowing Team Member access can attend.
STARS Forms Overview	Director, Assistant Director, State Staff	In this webinar, SHIP leaders will receive a demonstration of the beneficiary contact form, group outreach form, and media outreach form in STARS.	Once in April for SHIP directors, administrators, and their designees.
Beneficiary Contact Form	All roles	In this webinar, attendees will receive detailed instructions for completing the Beneficiary Contact Form in STARS. This webinar topic will be repeated monthly through October.	Offered twice monthly. Representatives from past groups and the group preparing for their STARS start date can attend.
Group Outreach and Media Outreach Forms	All roles	In this webinar, attendees will receive detailed instructions for completing the Group Outreach and Media Outreach forms in STARS. This webinar topic will be repeated monthly through October.	Offered monthly. Representatives from past groups and the group preparing for their STARS start date can attend.
Search Tools	All roles with the exception of STARS Submitters	In this webinar, attendees will receive detailed instructions for using the STARS Standard Search and Advanced Search tools.	Summer 2018
STARS Reports	All roles with access to reports	In this webinars, attendees will receive detailed instructions for using the STARS reports	Summer 2018

Appendix C: API Specifications

Overview

This overview is provided by [Booz Allen Hamilton](#). It is intended as guidance for any troubleshooting issues developers or business analysts may encounter while adapting proprietary systems to communicate with STARS.

General

- All Team Members in STARS will automatically have an eFile ID associated with their name and Team Member profile. To submit a record via API a user must have a valid STARS eFile ID that is not locked.
- A record coming into STARS via API must have an eFile ID associated with it.
- Only data suited to STARS will transfer, and the data to be transferred must be in an expected format – i.e. the fields and data types need to match.
- Validation messages will be returned as errors for records that are submitted with illogical or incorrect data.
- There are three types of records that can be submitted via API: Beneficiary Contact, Group Outreach & Education, and Media Outreach & Education. The Public and Media (PAM) form in SHIP NPR was split into two separate forms in STARS.
- Users will not be able to create Team Members or send user information via API (SHIPs: see the Team Member job aid for instructions about entering team members into STARS).
- When a record is submitted, a unique reference number will be generated.
- When submitting a Beneficiary Contact at least one “Topics Discussed” must be selected.
- When submitting a Beneficiary Contact record, selecting any input option **other than** “64 or Younger” will not allow the user to select “Yes” for Receiving or Applying for Social Security Disability or Medicare Disability. Refer to the list of database IDs for reference to what these values will be represented as in records.
- Whenever applicable, a Start Date must come before the End Date.
- Future dates beyond one day of the current date will not be allowed.
- Vendors will be asked to sign a system agreement (available later in 2018).
- Child objects to the forms in STARS do not transfer. This includes the Activity tab on the Team Member form, the Additional Beneficiary Sessions on the Beneficiary Contact Form, and SHIP Additional Team Members on the Group Outreach and Media Outreach Forms.
- Edits to data in the proprietary data systems will not transfer to STARS via API; only the original save of the data in the proprietary system will transfer.

Appendix D: User Roles Overview

Roles That Can Create Team Members

Though there are five user roles capable of entering team members, restrictions apply. For SHIPs selecting a two-tiered hierarchy, Sub-State (i.e. *regional*) user roles will not apply. For SHIPs selecting a State-only hierarchy, neither Sub-State nor Site roles will apply.

Here is a summary.

Role name	Capabilities
SHIP Director	<ul style="list-style-type: none"> • Create, update, and delete any team member • Only one person per SHIP can hold this role • This is the only role that can create Assistant Directors • Enter, edit, and search all types of data • Use all types of reports
SHIP Assistant Director	<ul style="list-style-type: none"> • Create, update, and delete any lower team member role • Enter, edit, and search all types of data • Use all types of reports
State Staff	<ul style="list-style-type: none"> • Create and update any lower team member role • Enter, edit, and search all types of data • Use all types of reports • <i>Unable</i> to delete data
Sub-State Manager	<ul style="list-style-type: none"> • Create and update any lower team member role at the sub-state and site level • Enter, edit, and search all types of data at the Sub-State level • Use all types of reports at the Sub-State level • <i>Unable</i> to delete data
Site Manager	<ul style="list-style-type: none"> • Can create and update any lower team member role at the site level • Enter, edit, and search all types of data at the Site level • Use all types of reports at the Site level • <i>Unable</i> to delete data

Other Roles - Overview

Role name	Created by (Roles)	Role Capabilities
Sub-State Staff	SHIP Director SHIP Assistant Director State Staff Sub-State Manager	<ul style="list-style-type: none"> • Create, update, and search any activity forms for their Sub-State and Sites below it • Search and view Sub-State and Site team member profiles (read only) • Use reports at the Sub-State level • Unable to delete any type of data
Site Staff	SHIP Director SHIP Assistant Director State Staff Sub-State Manager Site Manager	<ul style="list-style-type: none"> • Create and search any activity forms for their Site • Update the activity forms they have created • Search and view team member profiles and activities data for their site (i.e. read only) • Use reports at the Site level • Unable to update activity forms created by others • Unable to delete any type of data
Team Member	SHIP Director SHIP Assistant Director State Staff Sub-State Manager Site Manager	<ul style="list-style-type: none"> • Note: This role can be placed anywhere in the hierarchy (State, Sub-State, or Site level) • Create activity forms for their activities or the activities conducted by others at or below their level in the hierarchy • Search and view any activity forms at and below their level in the hierarchy (i.e. read only) • Update forms they created and forms about their efforts • Unable to update activity forms created by others • Unable to view other team member profiles • Unable to access reports • Unable to delete any type of data
STARS Submitter	SHIP Director SHIP Assistant Director State Staff Sub-State Manager Site Manager	<ul style="list-style-type: none"> • NOTE: An advantage of this role is that STARS Submitters do not count toward the system limit for the number of users nationally who can be in STARS concurrently. This improves the speed and efficiency of the STARS experience overall • Create activity forms for their activities or the activities conducted by others at or below their level in the hierarchy • View and update own forms and forms about their own efforts • Unable to view/update data entered by others about others • Unable to view other team member profiles • Unable to delete any type of data • Unable to access to the search tool or reports

At-a-Glance User Roles Reference

STARS User Roles Overview

Role Name	Enter own efforts & edit forms about own efforts	Enter forms about others efforts	View own forms & forms about others	View forms entered by and about others	Enter & edit team members	View other team members	Use Search Tool	Generate Reports	Create & manage Unique IDs	View Unique ID Numbers	Delete data
STARS Submitter ***	yes	*yes	yes	no	no	no	no	no	no	no	no
Team Member ***	yes	*yes	yes	*yes	no	*yes	no	no	no	no	no
Site Staff	yes	*yes	yes	*yes	*yes	*yes	*yes	no	*yes	no	no
Site Manager	yes	*yes	yes	*yes	*yes	*yes	*yes	no	*yes	no	no
Sub-State Staff	yes	*yes	yes	*yes	*yes	*yes	*yes	no	*yes	no	no
Sub-State Manager	yes	*yes	yes	*yes	*yes	*yes	*yes	no	*yes	no	no
State Staff	yes	yes	yes	yes	yes	yes	yes	no	yes	no	no
SHIP Assistant Director	yes	yes	yes	*yes	yes	yes	yes	yes	yes	yes	yes
SHIP Director	yes	yes	yes	*yes	yes	yes	yes	yes	yes	yes	yes

KEY:
 * At and below their level on the hierarchy
 ** Roles lower than their own (and at and below their level on the hierarchy)
 *** Can be aligned with any organization at any level of the hierarchy
 Note: If there is no asterisk, "yes" and "no" apply unilaterally to all SHIP data