

# Team Members

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## Introduction

This job aid is a reference guide to setting up and editing SHIP team members in the SHIP Tracking and Reporting System (STARS). STARS access is based on nine different user roles. Of those nine roles, only five are able to enter team members, update team members, and assign team member user roles:

1. SHIP Director
2. SHIP Assistant Director
3. State Staff
4. Sub-State Manager
5. Site Manager

Definition of Team member: The term “team member” refers to all SHIP team members, including SHIP-paid, in-kind paid, and SHIP volunteers.

All SHIP team members must be entered into STARS before their activities can be reported. SHIP team members responsible for entering data will need to be entered into STARS and assigned a STARS user role. **(!) IMPORTANT: Team members can be created prior to your [SHIP Group STARS start date](#); however, **NO** beneficiary contacts, group outreach activities, or media outreach activities should be entered until on and after your STARS start date. That type of data should be entered into SHIP NPR until your STARS start date.**

About STARS - <https://stars.entellitrak.com>

[STARS](#) is the nationwide, web-based SHIP data system that facilitates the reporting of SHIP activities. STARS was developed and is owned by the U.S. Administration for Community Living (ACL), Office of Healthcare Information and Counseling (OHIC), which oversees and manages the SHIP program nationally. These instructions assume that you already know the basics about accessing STARS.

### Technical Assistance

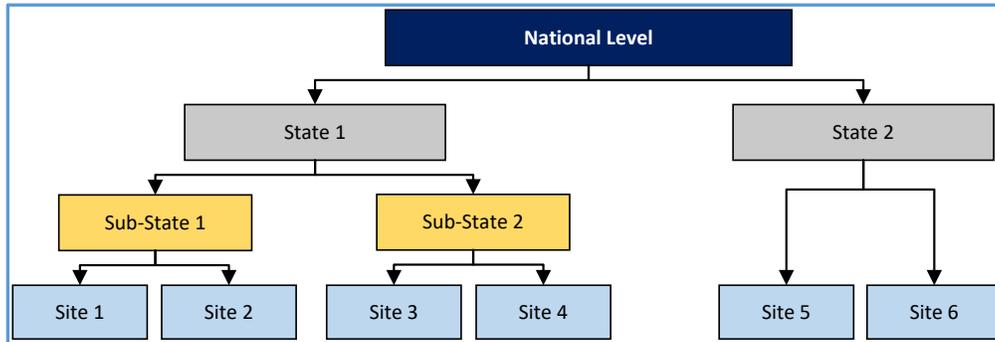
- **Go to STARS:** <https://stars.entellitrak.com>. See “Need Help with STARS?”
- For help with usernames and passwords or with questions about your STARS hierarchy, contact the STARS help desk at Booz Allen Hamilton, [boozallenstarshelpdesk@bah.com](mailto:boozallenstarshelpdesk@bah.com) or 703-377-4424
- For questions about STARS support resources, contact the SHIP TA Center at [stars@shiptacenter.org](mailto:stars@shiptacenter.org) or 877-839-2675.

## STARS User Roles

The ability to enter team members and the type of team members a user can enter depends upon both the STARS hierarchy and the type of user role. Whether a user can use the search tool or see reports also depends upon the user role. (See [Appendix B](#) for STARS user roles at-a-glance reference.)

## STARS Hierarchy

This chart depicts the STARS hierarchy. Each entity in 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 no hierarchy (i.e. State-level only).



The number of Sub-States (i.e. *regions*) and/or Sites is determined at the State level. Each organization will be able to access all records associated with their organization and, if applicable, those that sit below them in the hierarchy. Each SHIP’s hierarchy was established in advance of the STARS launch and can only be edited by Booz Allen Hamilton.

## Roles That Can Create Team Members

Though there are five user roles capable of entering team members, restrictions apply. For states selecting a two-tiered hierarchy, Sub-State (i.e. *regional*) user roles will not apply.

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

## Other Roles - Overview

Below are the four other STARS roles, who can create them, and the role capabilities.

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"> <li>• <b>Create, update, and search</b> any forms for their Sub-State and Sites below it</li> <li>• <b>Search and view</b> Sub-State and Site team member profiles (read only)</li> <li>• <b>Use reports</b> at the Sub-State level</li> <li>• <b>Unable</b> to delete any type of data</li> </ul>
Site Staff	SHIP Director SHIP Assistant Director State Staff Sub-State Manager Site Manager	<ul style="list-style-type: none"> <li>• <b>Create and search</b> any forms for their Site</li> <li>• <b>Update</b> the forms they have created</li> <li>• <b>Search and view</b> team member profiles and activities data for their site (i.e. read only)</li> <li>• <b>Use reports</b> at the Site level</li> <li>• <b>Unable</b> to update forms created by others</li> <li>• <b>Unable</b> to delete any type of data</li> </ul>
Team Member	SHIP Director SHIP Assistant Director State Staff Sub-State Manager Site Manager	<ul style="list-style-type: none"> <li>• <b>Note:</b> This role can be placed anywhere in the hierarchy (State, Sub-State, or Site level)</li> <li>• <b>Create</b> forms for their efforts or the efforts conducted by others at or below their level in the hierarchy</li> <li>• <b>Search and view</b> forms at and below their level in the hierarchy (i.e. read only)</li> <li>• <b>Update</b> forms they created and forms about their efforts</li> <li>• <b>Unable</b> to update forms created by others, about others</li> <li>• <b>Unable</b> to view other team member profiles</li> <li>• <b>Unable</b> to access reports</li> <li>• <b>Unable</b> to delete any type of data</li> </ul>
STARS Submitter	SHIP Director SHIP Assistant Director State Staff Sub-State Manager Site Manager	<ul style="list-style-type: none"> <li>• <b>NOTE:</b> 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</li> <li>• <b>Create</b> forms for their efforts or efforts conducted by others at or below their level in the hierarchy</li> <li>• <b>View and update</b> own forms and forms about their own efforts</li> <li>• <b>Unable</b> to view/update data entered by others about others</li> <li>• <b>Unable</b> to view other team member profiles</li> <li>• <b>Unable</b> to delete any type of data</li> <li>• <b>Unable</b> to access to the search tool or reports</li> </ul>

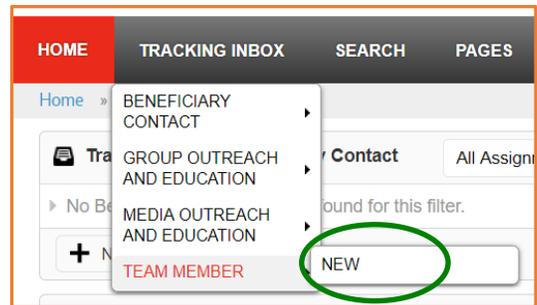
# Security Ground Rules

To protect the security and integrity of STARS data, ACL’s expectations related to managing STARS users and other SHIP team members in STARS are as follows:

- Anyone assigned to use STARS is given his or her own user access information and does not share it with anyone, including other SHIP staff or volunteers.
- When anyone with STARS access leaves the SHIP, their access is immediately disabled by a SHIP director or someone with an assistant director user role. (See [Revoke Login.](#))

## Enter a New Team Member

[Login to STARS](#) and select Tracking Inbox > Team member > NEW from the menu.

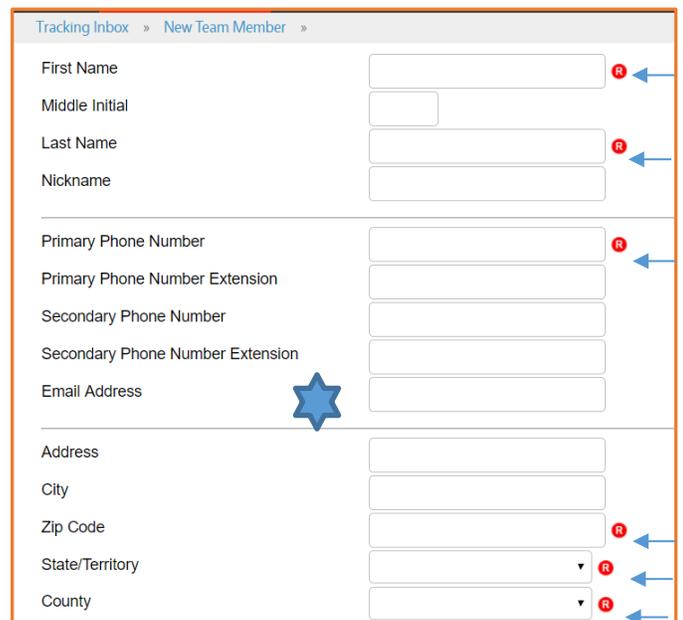


### 1. Enter Basic Contact Information

Fields marked with a red R are required.

- First Name
- Last Name
- Primary Phone Number
- Zip Code
  - Auto-populates the county field
- State/Territory
  - Select your State/Territory from the list
- County

 **(!) IMPORTANT:** Though Email Address is not technically a required field, it is required if you intend to have STARS send team members their user credentials. If an email address is *not* entered, yet you later attempt to send user credentials, this notification will appear when you click Save.



**Workflow Messages**

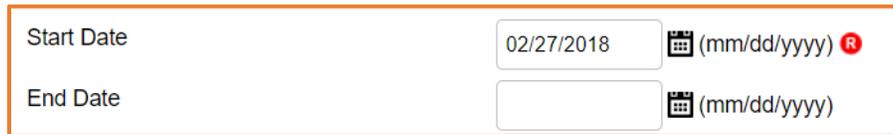
- The record has been updated, but user credentials have not been sent. Please enter an email address to send user credentials.

- NOTE: Email is also required for the *forgot password* functionality. Users without email addresses can call the STARS help desk at [Booz Allen Hamilton](#) to receive their credentials and password. Also, if an email address appears more than once in STARS (and/or SIRS), the user/s of that email address will be *unable* to use the *forgot password function* and will have to call [Booz Allen Hamilton](#) for password support.

## 2. Status and Demographics

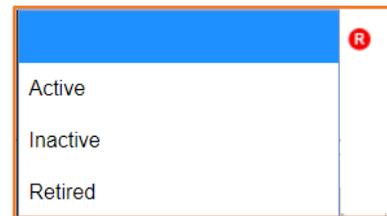
Data entry procedures for these fields should be intuitive. STARS uses standard online form completion tools that should be familiar to most computer users. Most of these fields are required.

- **Start Date (R):** Use the date selector to complete the start date or enter the date manually.



A screenshot of a form with two date fields. The first field is labeled 'Start Date' and contains the text '02/27/2018' next to a calendar icon and '(mm/dd/yyyy) R'. The second field is labeled 'End Date' and is empty, with a calendar icon and '(mm/dd/yyyy)' next to it.

- **Status (R):** During the initial STARS implementation of 2018, you should only enter members who are currently with your program, not inactive or retired members. Once STARS is fully implemented, you can inactivate and retire members in STARS, [when applicable](#).



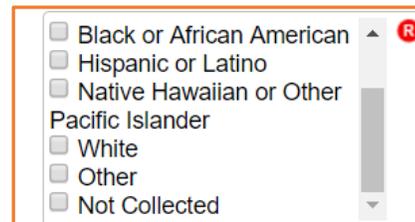
A screenshot of a dropdown menu with a blue header bar. The menu is open, showing three options: 'Active', 'Inactive', and 'Retired'. A red 'R' icon is visible in the top right corner of the dropdown.

- **Partner Organization (R):** These were set up within your site hierarchy; pick from the drop down list (not pictured). If an organization you are expecting doesn't appear, contact your SHIP director or SHIP Assistant director/s for STARS.
- **Paid Status (R):** These are defined exactly as they were in SHIP NPR



A screenshot of a dropdown menu with a blue header bar. The menu is open, showing three options: 'In-Kind-Paid', 'SHIP-Paid', and 'Volunteer'. A red 'R' icon is visible in the top right corner of the dropdown.

- **Race (R):** Tip – use the scroll bar within the dropdown list to see all options.



A screenshot of a dropdown menu with a blue header bar. The menu is open, showing a list of race categories with checkboxes: 'Black or African American', 'Hispanic or Latino', 'Native Hawaiian or Other Pacific Islander', 'White', 'Other', and 'Not Collected'. A red 'R' icon is visible in the top right corner of the dropdown.

- **Date of Birth (R):** Tip – it may be easier to manually enter the birthdate rather than scrolling backward through the months and years using the date selection tool.



A screenshot of a form field labeled 'Date of Birth'. It contains an empty text box next to a calendar icon and '(mm/dd/yyyy) R'.

- **Gender:** Not required and not pictured

- **Primary Language (R):**
- **Secondary Language:** Complete, if applicable (identical drop down list)



### 3. User Role, Program, and Credentials

In the final area of the Team member form, you establish the STARS user’s role and complete associated role-based fields. Several important decisions are made in this area of the form.

- **Role (R):** This drop down list (not pictured) is role-sensitive.
  - For example, the list of options visible to a SHIP Director will be longer than the list of options available to a Site Manager. [Click here to review user roles](#)



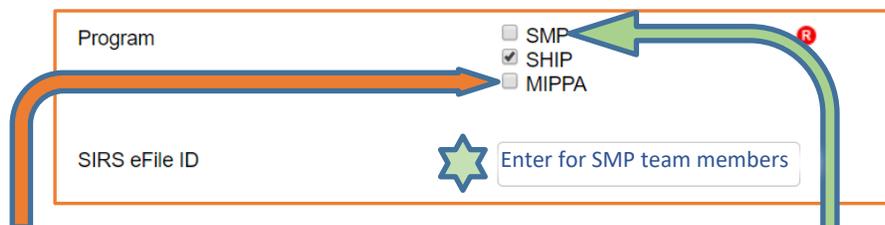
**Send Login Credentials - (!) IMPORTANT:** During the roll-out, it may be wise to only send login credentials on or after your group’s start date (unless you are creating a team member whose role is to enter other team members). Alternatively, emphasize to your team members that they must not enter SHIP efforts in STARS until your SHIP Start date. [Click here to review groups and STARS start dates](#).

- **Not ready to send credentials?** Select **No**. 

- **Ready to send credentials?** Select **Yes**. 

- **NOTE (!):** Login credentials are sent to the user’s email address in STARS. An [email address](#) is required in STARS if you select Yes to Send Login credentials.

- **(!) Program (R):** Three are listed, and the system selects SHIP by default.



- (!) If this team member does MIPPA work, click MIPPA also.**
- (!) If you unclick SHIP, this team member’s efforts will not count toward any SHIP reports; leave SHIP checked (unless the team member is MIPPA only).**
- (!) If this team member does SMP work, click SMP also and enter  the team member’s SIRS eFile ID.** (SIRS is the SMP data reporting system.)

#### 4. 1-800-Medicare Unique ID fields

Creation and management of the 1-800-Medicare Unique ID fields is limited to the SHIP Director and SHIP Assistant Director roles, though some other roles can view team member’s Unique IDs. (See the chart in [Appendix B.](#))

The default answer in STARS to *Create 1-800 Medicare Unique ID Number* is “No.”

Create 1-800 Medicare Unique ID Number  Yes  No R

During the STARS Launch, SHIP Director and SHIP Assistant Director Users can select “Yes” for team members who are given this privilege, even though the STARS-generated Unique ID will not be recognized by CMS until January 2019. Counselors will use their NPR-generated Unique ID through 2018. Selecting “Yes” when creating the team member prevents you from having to update this field later, although leaving the answer as “No” and updating it later is certainly an option. The important point is next regarding the *Send 1-800 Medicare ID*.

**(!) IMPORTANT: Send to 1-800 Medicare ID.** During the STARS launch of 2018, SHIP counselors will continue to use the Unique ID generated in SHIP NPR. Because of this, **DO NOT click yes to *Send 1-800-Medicare ID*.** The default answer “No” is the correct option now. **Wait until January 1, 2019 or after to send Unique IDs from STARS.**

Send 1-800 Medicare ID  Yes  No R  
 Status of 1-800-Medicare Unique ID Number Inactive R

**Status of 1-800-Medicare Unique ID Number.** This field reads *Inactive* by default. If this team member needs a Unique ID, click the drop down arrow and select *Active*.

Inactive  
Active  
Inactive

During the STARS launch phase, these fields for a team member with a Unique ID will likely look like this:

Create 1-800 Medicare Unique ID Number  Yes  No R  
 Send 1-800 Medicare ID  Yes  No R  
 Status of 1-800-Medicare Unique ID Number Active R  
 Number of 1-800-Medicare Unique ID

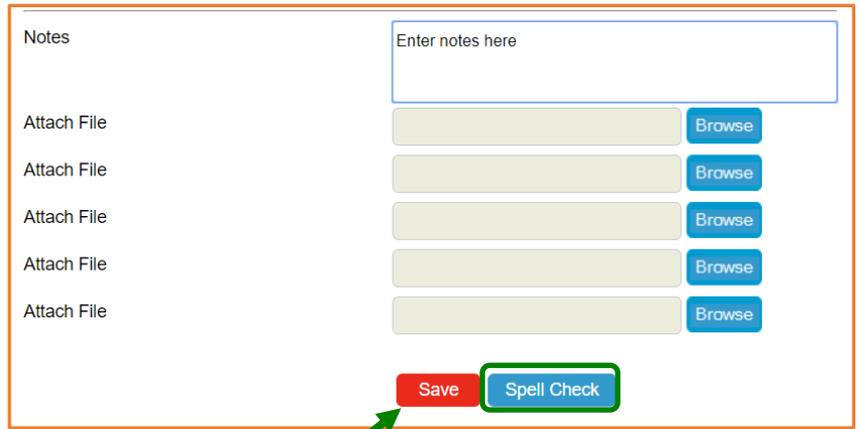
Notice that the *Number of 1-800-Medicare Unique ID* field is empty at this stage of data entry. After saving, a Unique ID number will auto-generate. Users below the SHIP Assistant Director

level whose role allows them to view Team Member profiles will see this *Number of 1-800-Medicare Unique ID* (read only).

## 5. Notes and Attaching Files

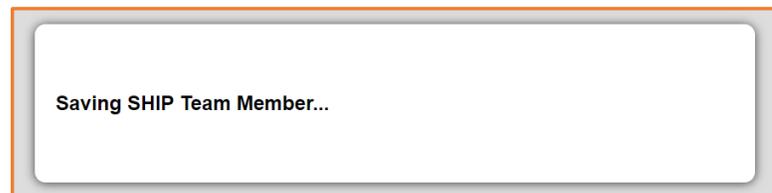
Enter notes, if applicable. STARS even has a *Spell Check* feature (outlined in green). It is particularly helpful for *Notes*, but it will check any of the data entry fields on the Team Member form.

The *Attach File* function works just like email software: Click “Browse” to select the file you wish to attach from your computer. STARS is liberal about the allowed file types.



## 6. Save Your Entry

- The Save button is blue, but it turns red when touched by your mouse (as shown)
- This prompt appears to alert you that STARS is saving your team member. It may disappear very quickly, based upon the speed of your browser.



- When the prompt disappears, your work is saved. You will remain on the page depicting your newly entered team member. STARS will not redirect you elsewhere within the system. You must manually select your next desired action.

## Update Team Members You Created

All STARS users who can create team members can also update (edit) those team members. [Login to STARS](#) and select *Tracking Inbox* from the menu. All team members you created are visible. If your role allows you to see or update team members created by others, you will need to use the Search tool to find them. The STARS User Basics job aid addresses the Search tool, and a future job aid will provide even more detailed search instructions.

## Find Your Saved Team Members

You can find team members you created in your tracking inbox. You can find other team members visible to your role using the STARS search tool. These instructions focus on the tracking inbox, but a separate job on using the STARS search tool will be helpful for STARS users with higher roles.

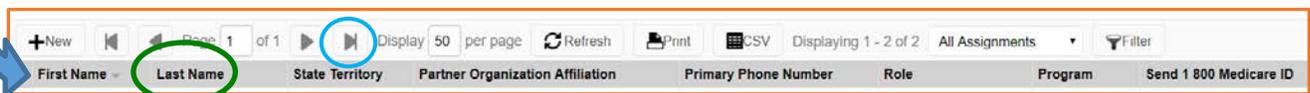
### Tracking Inbox Tips

Lists all team members you created. It is unique to you.

If your role allows you to view or update other team members, you will need to use the Search tool to find them.

STARS Submitters do not have the Search Tool.

The column headers of your team member Tracking Inbox are sortable upon a click. They sort in ascending order upon one click. Click again, and they sort in descending order (and so on). A row of search tools are also available to you. The more team members you have entered, the more useful they may be. For example, you could click on the “Last Name” column header (circled in green) to sort alphabetically by last name. You could then click the arrow pointing right to scroll from page to page (circled in blue). You can also change the number of records displayed at one time. In the example below, 50 records display at a time.



## Open the Saved Team Member Form

When you find your desired team member, clicking anywhere within their row of information opens their record. In the example to the right, our mouse has hovered over John Doe’s record, and it became gray. Upon click, John Doe’s team member form will open.

▶	Donald	Duck	Virginia	Alexandria Division of Aging and Adult Services (PS
▶	John	Doe	Virginia	Alexander Senior Center
▶	Test	Sample	Virginia	AgeSmart

## Editing the Beneficiary Contact Form

Use the same process for editing a team member form as you used for [entering a team member](#). Any field can be edited, including the role. This is a difference from SHIP NPR. When you are done, click Save. A prompt will confirm your edits are being saved.

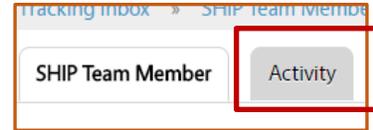
## Activity Tab

There is an *Activity* tab associated with each saved team member profile in STARS. It allows you to track team members time spent on efforts not captured in the Beneficiary Contact

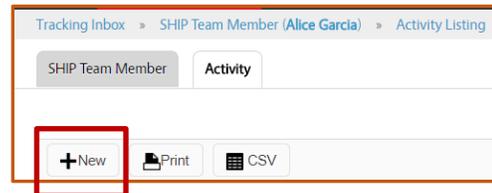
Form, the Group Outreach and Education Form, or the Media Outreach and Education Form. Options include Administrative Support, Program Management, and Other (such as training or orientation hours). **Hours entered through this Activity tab count in SHIP reports.**

After you have opened any saved team member form, you will see the completed team member details and an *Activity* tab:

1. Click on the *Activity* tab to see the available fields.



2. You will see a list of previous activities, if there are any, and the “New” button. Click “New” to enter an *Activity*.



3. This is the form associated with additional team member activities:

- a. “Month” and “Year” are required fields.
- b. Enter time spent in minutes in one or more of the spaces provided.
- c. Minutes from all three types of listed activities total automatically.
- d. You can explain the type of activity in more detail (particularly “Other”) using the “Notes” field.
- e. Don’t forget to save your work by clicking the blue *Save* button.

## When to Retire, Inactivate, or Delete

The status of a team member who is not currently active with your SHIP program can be nuanced. Our scope here is to explain the *Status* field options in more depth and the importance of revoking logins for team members who are not “Active.” During the initial

STARS implementation of 2018, you should only enter members who are currently with your program, not inactive or retired members.

### Inactive Status

A team member is considered inactive when the *Status* field is manually set to “Inactive,” but STARS has been built to automatically inactivate accounts - including the 1-800-Medicare Unique ID Number - when certain system inactivity criteria have been met. However, **these rules won’t apply until autumn 2018,**



**after the roll-out is complete. They have been temporarily suspended for the roll-out phase.** Also, keep in mind that the 1-800-Medicare Unique ID generated by STARS will not actually be used by SHIP personnel until January 2019. A later version of this job aid will contain details about automated inactivation.

### Revoke Login

You must revoke the login of members who are “Inactive.” Select “Yes” for *Revoke Login*.



### Retired Status

We recommend selecting “Retired” as the Status if the team member is no longer with the SHIP program, they are not coming back, and they will not be accessing STARS in the future. When a team member retires, remember to revoke their login (shown above).



### Should You Delete a Member?

The answer is “usually not.” As a reminder, only SHIP Directors and SHIP Assistant Directors in STARS can delete a team member. The decision to delete a team member must be thought through carefully. Most of the time, you will retire or inactivate. Here are the considerations:

 **Our best practice is for the team member to be made “Inactive” in the *Status* field**

- ✓ **If you delete, their data must first be re-assigned**
  - Note: steps for re-assigning data will be outlined in a future version of this job aid.



- ✓ **(!) Important:** SHIP Directors and SHIP Assistant Directors should ensure there are no records attached to a Team Member they wish to delete.
  - Example—if a Team Member is deleted while also being listed on an outreach record as the *Session Conducted By* value, this record needs to be reassigned

before the Team Member is deleted. To reassign a record, select a different team member from the *Session Conducted By* drop down box. If the Team member is deleted before the record is re-assigned, *Session Conducted By* will be null.

- The Search Tool is the best way to find Team Members whose records may need to be reassigned.
- ✓ In those rare instances where you need to delete a team member, make sure you have reassigned all associated records, then follow the steps already described for [updating a team member](#).

- At the bottom of the page, click the blue Delete button. It will turn red upon click.
- A message will ask you if you are sure you want to delete. Click OK



## Conclusion

This and other STARS support materials from the SHIP National Technical Assistance Center (SHIP TA Center) are linked on the STARS landing page at <https://stars.entellitrak.com>. STARS users should access STARS materials from the link under “Need Help” on the STARS landing page. STARS job aids are likely to be updated regularly throughout the 2018 STARS launch. Job aids on new topics are also being created throughout 2018.



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## Appendix: 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: User Roles At-A-Glance

## STARs User Roles Overview

Role Name	Enter own efforts & edit forms about own efforts	Enter forms about others	View own forms & forms about own efforts	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	no	no	*yes	no	no	no	no	no
Site Staff	yes	*yes	yes	no	*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	no	*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