

# Standard and Advanced Searches

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## Introduction

This job aid is a reference guide to using the STARS Search functionality. Any field present on the forms within STARS is searchable. STARS searches differ from STARS reports in that the search menu allows you to define your own search criteria. Reports contain already defined parameters. Searches allow you to access and open the individual forms that match your search criteria. Reports display aggregated data.

In 2018, the following STARS reports will be available:

- SHIP Performance Measure Report
- Resource Report
- 1-800-Medicare Unique IDs Report

All other data will need to be accessed using the Search menu.

STARS offers two kinds of searches, Standard and Advanced. Here is a brief overview of their differences and tips for using one type rather than the other.

- **When to use a Standard Search:** Standard searches allow you to find, view, and edit all data in STARS available to your role. For example, this is the fastest way to find forms entered by other team members.
- **When to use an Advanced Search:** Use advanced searches when the results you seek aren't available in a standard search, when you wish to export to Excel to manipulate the data, or when you want to access a shared search.
- **Comparison of the two types of searches:**

Search Type	Advantages	Disadvantages
Standard	<ul style="list-style-type: none"> <li>• Easy to define search criteria</li> <li>• Can save for the duration of your current session</li> <li>• Can sort search results by clicking column headings (like the tracking inboxes)</li> </ul>	<ul style="list-style-type: none"> <li>• Cannot export to Excel</li> <li>• Cannot save criteria for future sessions</li> <li>• No shared search capability</li> <li>• Cannot define the display format of search results</li> </ul>
Advanced	<ul style="list-style-type: none"> <li>• Can export to Excel</li> <li>• Can create more complex search criteria</li> <li>• Can define search results display format (e.g. column preferences)</li> <li>• Can be shared with and by other national users of the same role</li> <li>• Can display saved searches on dashboard</li> </ul>	<ul style="list-style-type: none"> <li>• More complex to understand and use</li> <li>• A large number of criteria and/or columns may lead to increased strain on system performance, potential slowdowns, and potential errors</li> </ul>

## STARS Address and Technical Assistance

The STARS address is <https://stars.entellitrak.com>. It 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

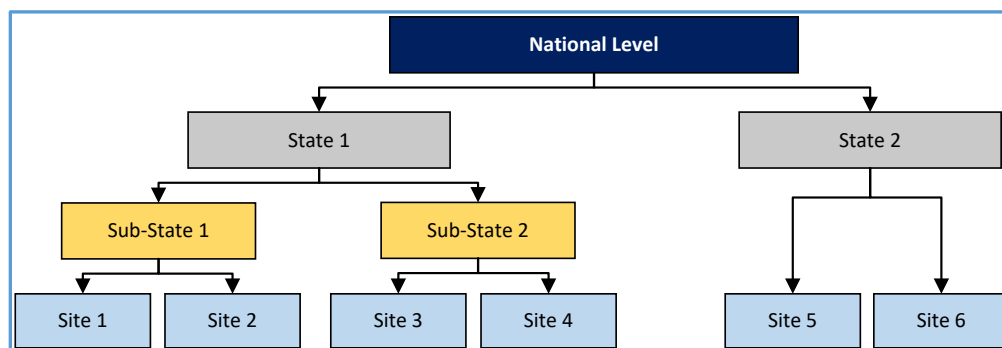
- **Go to STARS:** <https://stars.entellitrak.com>. See “Need Help with STARS?”
- For STARS technical assistance, including help with usernames and passwords or with questions about your STARS hierarchy, contact the STARS help desk at Booz Allen Hamilton, [boozallenstarshelpdesk@bah.com](mailto:boozallenstarshelpdesk@bah.com) 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

## Your Role Impacts Searches

STARS is role-based. The rule of thumb is that users can search within their area on the STARS hierarchy and below. Searchable data depends upon your STARS user role and your alignment within the STARS hierarchy. All STARS user roles with the exception of the STARS Submitter user role can conduct searches. Users with STARS Submitter role can search their efforts and data they entered using the Tracking Inbox (see the STARS Submitter User Basics job aid).

### 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 may 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. Users can search 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.

### At-a-Glance: Search Capability by Role

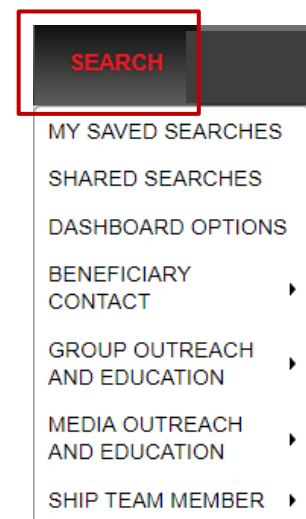
Here is an at-a-glance reference to searchable data, depending upon your user role.

Role name	Capabilities
SHIP Director	<ul style="list-style-type: none"> <li>Can search all data at the state level and below</li> </ul>
SHIP Assistant Director	<ul style="list-style-type: none"> <li>Can search all data at the state level and below</li> </ul>
State Staff	<ul style="list-style-type: none"> <li>Can search all data at the state level and below</li> </ul>
Sub-State Manager	<ul style="list-style-type: none"> <li>Search all data at the Sub-State level and below</li> </ul>
Sub-State Staff	<ul style="list-style-type: none"> <li>Search all data at the Sub-State level and below</li> </ul>
Site Manager	<ul style="list-style-type: none"> <li>Search all data at the Site level and below</li> </ul>
Site Staff	<ul style="list-style-type: none"> <li>Search all data at the Site level and below</li> </ul>
Team Member	<ul style="list-style-type: none"> <li>Search any forms at and below their level in the *hierarchy * <i>Note: this role can be aligned with any level of the hierarchy; the decision is made when the Team Member is created</i></li> <li>Unable to search team members</li> </ul>
STARS Submitter	<ul style="list-style-type: none"> <li>N/A. No Search menu; must use the Tracking Inbox</li> </ul>

### Search Menu Overview

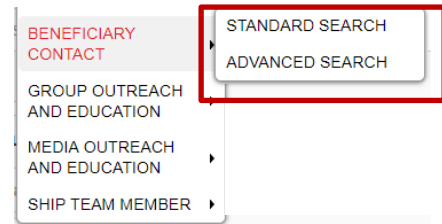
[Login to STARS](#) and select *Search* from the menu. The following options appear.

- **My Saved Searches.** Access searches you have saved.
- **Shared Searches.** Access searches others have shared with you.
- **Dashboard Options.** Select searches to appear on your Home Page.
- **Beneficiary Contact.** Search beneficiary contact forms available to your role.
- **Group Outreach and Education.** Search group outreach and education forms available to your role.
- **Media Outreach and Education.** Search media outreach and education forms available to your role.
- **SHIP Team Member.** Search team members available to your role.



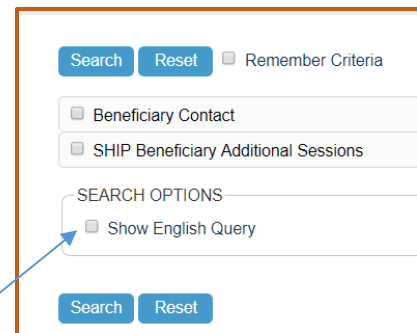
## Select a Type of Form and a Type of Search

The searches are organized according to the four main data forms in STARS. If you click the name of a form, STARS initiates the standard search functionality by default. Notice that the four forms options each have an arrow to their right. To conduct advanced searches, hover your mouse over the form name to activate the arrows. When activated, the form name turns red and your two search options appear: *Standard Search* and *Advanced Search*.



## Standard Search

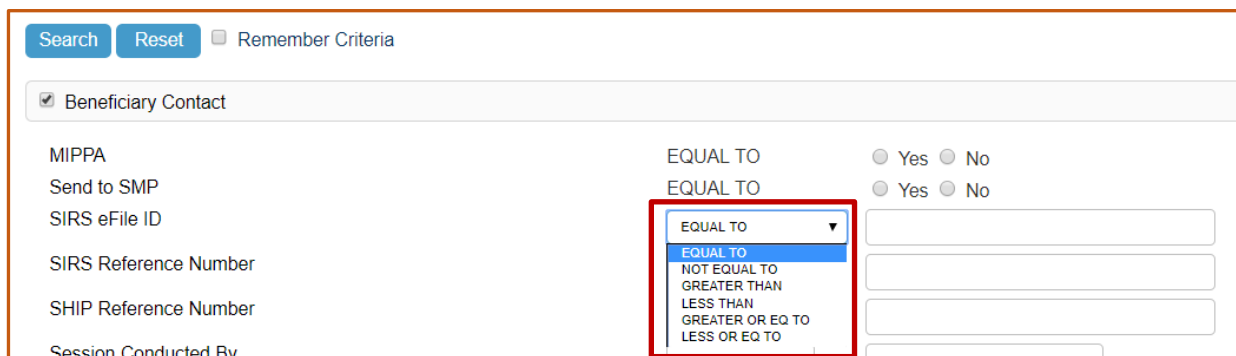
When you select *Standard Search*, a simple page will appear asking you to identify which form you would like to search – the main form *or* the form available through its “child object” tab. In the example shown, the “child object” is the SHIP Beneficiary Additional Sessions form. You can select “Beneficiary Contact” *or* its child object, “SHIP Beneficiary Additional Sessions” (not both).



- *Show English Query?* This provides a statement of the search criteria entered. For example “Looking for SHIP Beneficiary Contact with State of Session Location equal to California.”
- *Remember Criteria.* If you click this box, your search will be saved until you log out.
- Note: The top and the bottom *Search* buttons operate identically, as do the two *Reset* buttons.

## Select Your Operators

Continuing with the example of the Beneficiary Contact search, checking the “Beneficiary Contact” box yields a page with every field in the Beneficiary Contact Form. The “operator” is the column with your criteria, such as “Equal To,” “Not Equal To,” and so on. Some fields have only one option, such as “Equal To” for *MIPPA*. Other fields have multiple operators, like the example outlined in red below.



## Select Your Denominators

The “denominator” is your entered data. In the example below, Alice Johnson is the first of several *Session Conducted By* denominators. Our operator is “Equal To,” and we will select our denominator from the available options that appear in the drop down menu. When the denominator is a drop down menu, only one item in the menu can be selected.

Session Conducted By	EQUAL TO ▼	Alice Johnson Demo Director John Smith SHIP Friend STARSSubmitter MS STARSTeamMember MS Test API
Partner Organization Affiliation	EQUAL TO ▼	
Zip Code of Session Location	EQUAL TO ▼	
State of Session Location	EQUAL TO ▼	
County of Session Location	EQUAL TO ▼	

When the denominator is a blank field, such as *Partner Organization Affiliation*, you must use your keyboard to enter a denominator. In this type of field, your operator options will be very helpful in narrowing down your results. For example, selecting “Starts With” allows you to enter only the first letter or letters of an organization name instead of the entire name.

Partner Organization Affiliation	STARTS WITH ▼	
Zip Code of Session Location	EQUAL TO NOT EQUAL TO LIKE NOT LIKE STARTS WITH ENDS WITH	
State of Session Location		

Some denominators are presented as checkbox options. *Beneficiary Race* is an example. When there are checkboxes, you can select multiple denominator options, if desired.

Beneficiary Race	CONTAINS ANY ▼ CONTAINS ANY CONTAINS ALL DOES NOT CONTAIN	<input type="checkbox"/> American Indian or Alaskan Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other <input type="checkbox"/> Not Collected
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- **Important (!):** For best results, limit your search criteria to just the information you need.

## Get Your Results

1. After defining your standard search operators and denominators, click the blue Search button at the top or bottom of the page.

Search

2. Your results will appear.
  - a. If there were no matches, you will see the following message:

**Matching Results: 0**

► No search results found. Please try different keywords.

- b. When there are matches, they will appear in a table format with the same column headings as the Tracking Inbox. The example below depicts a match for a Beneficiary Contact Form Standard Search.

Search > Standard Search (Beneficiary Contact) > Results >

Matching Results: 1

Page 1 of 1 Display 1 per page Refresh Displaying 1 - 1 of 1

Beneficiary First Name	Beneficiary Last Name	Date of Contact	SHIP Case Number	County of Session Location	Zip Code of Session Location	State of Session Location	Total Time Spent	SIRS Reference Number
George	Burns	05/23/2018	VA-18-89	Prince William - VA	22193	Virginia	45	VA-18-1247-SHIP SMP

- c. When searches yield many results, use the tools above the column headings to navigate your results. Click the backward and forward arrows to move from page to page.



You can also determine how many matches to display on a single page. In the example above, 1 match displays on a page.

- d. To change it, click in the space provided and type your desired number.
- e. Click *Refresh* to apply.
3. If you would like to print your results, use your browser's print functionality. Here is an example using Google Chrome:

- a. Click the three dots.



- b. Find "Print" on the list of options (or press Ctrl+P on your keyboard).



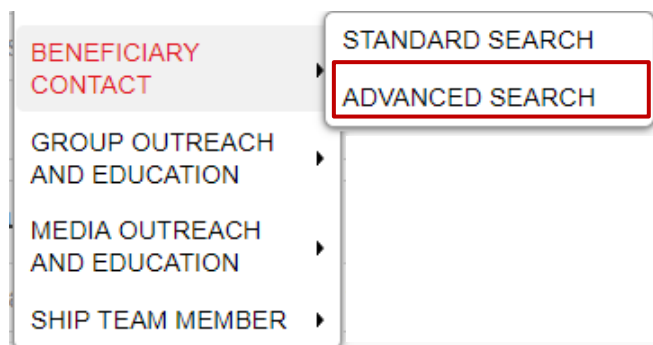
- c. Follow the online prompts to select your printer or save to PDF.
- i. Tip: choose landscape layout rather than portrait.

## Advanced Search Overview

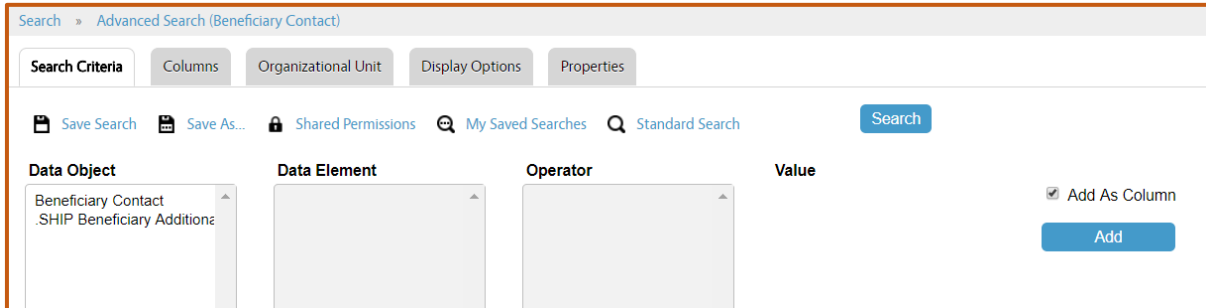
To conduct an advanced search, use your mouse to activate the arrow associated with the topic of your choice. This opens the *Advanced Search* menu option.

In the example shown, the mouse hovered over *Beneficiary Contact*.

1. Click *Advanced Search*.

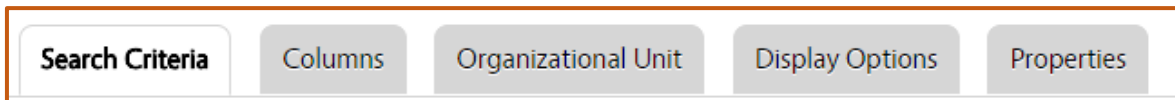


- You will see a page like this, customized to the form you selected for your advanced search. This example is of a Beneficiary Contact Form advanced search interface.



## Advanced Search Tabs Explained

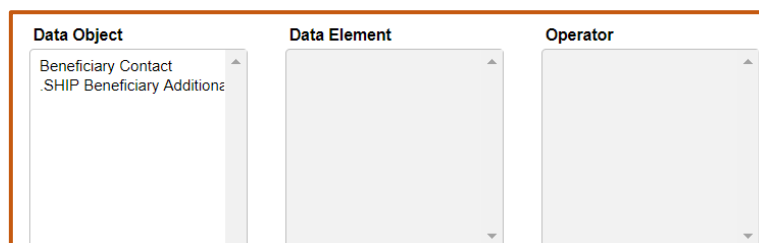
Five tab options appear for any advanced search. At a minimum, you must respond to the *Search Criteria* tab before you can conduct an advanced search.



- **Search Criteria:** Use this tab to select the date range and/or other search criteria. This is the first tab that opens by default when activating an advanced search. When the tab label is bold with a clear background, it is the active tab.
- **Columns:** Use this tab to select which data fields will be included in your search. Each data field selected will appear as a separate column in the search results.
- **Organizational Unit:** Use this tab if you would like to narrow your search by your sub-states or sites.
- **Display Options:** Use this tab to choose the format in which you would like to receive the search results. This is where you would select “Microsoft Excel” if you want to export, sort, and filter data.
- **Properties:** Use this tab to name the search.

## Search Criteria

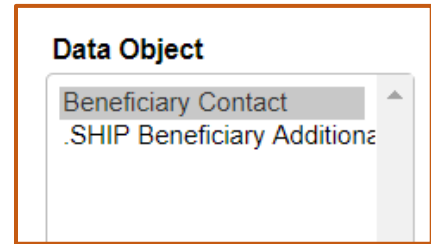
There are three categories of search criteria that appear initially: Data Object, Data Element, and Operator. After you select an Operator, a fourth criteria – *Value* – will appear.



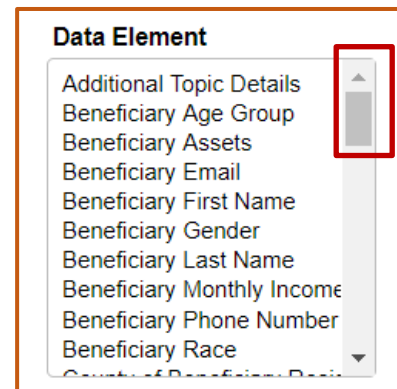


1. **Data Object.** Select a data object. This refers to the form or its associated secondary form (i.e. “child object”) containing the data you wish to search. Data Object corresponds to the STARS forms and their associated secondary forms, as follows:

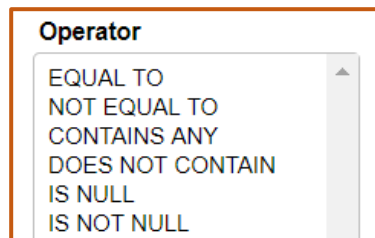
- a. *Beneficiary Contact* is the main form and *SHIP Beneficiary Additional Sessions* is the secondary child object form (shown to the right)
- b. *Group Outreach and Education* is the main form and *Additional Team Members* is the secondary child object form (not shown).
- c. *Media Outreach and Education* is the main form and *Additional Team Members* is the secondary child object form (not shown).
- d. *Team Member* is the main form and *Activity* is the secondary child object form (not shown).



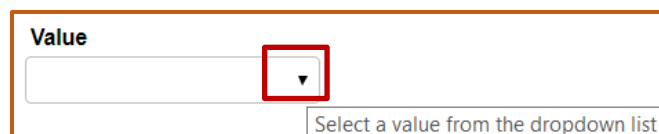
2. **Data Element.** Select a data element. This refers to the fields within the form or its associated tab that you selected under Data Object. In our example, we had selected *Beneficiary Contact* as our data object. The fields in the Beneficiary Contact Form appear in alphabetical order as our data elements. Use the scroll bar to see all of them. You can only select one at this stage of developing your criteria.



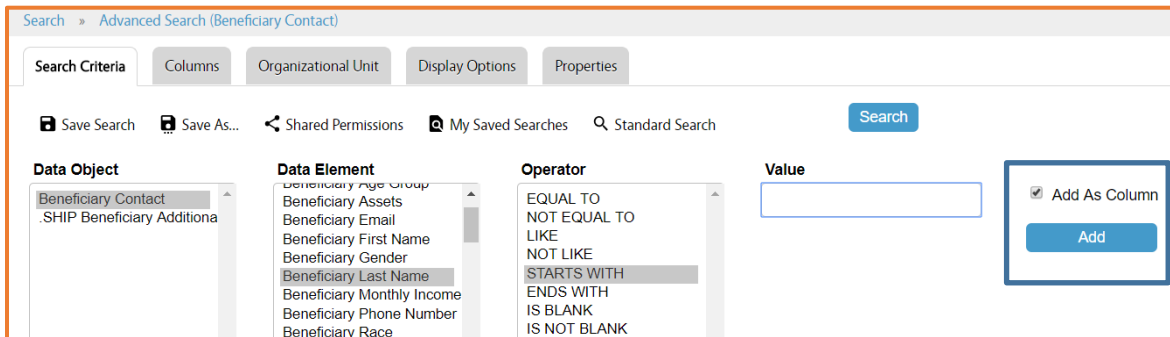
3. **Operator.** Like the Standard Search, select your desired *Operator* criteria, which further narrows your search.





4. **Value.** This field is empty until you select your operator. A prompt reminds you that you must “Select a value from the dropdown list.” Click the arrow to view the dropdown list.



In the example below, the *Data Element* is “Beneficiary Last Name,” the *Operator* is “Starts With,” and the *Value* must be entered. Notice that the *Add As Column* checkbox is marked by default. This enables the blue *Add* button to add this string of criteria to your overall search criteria.



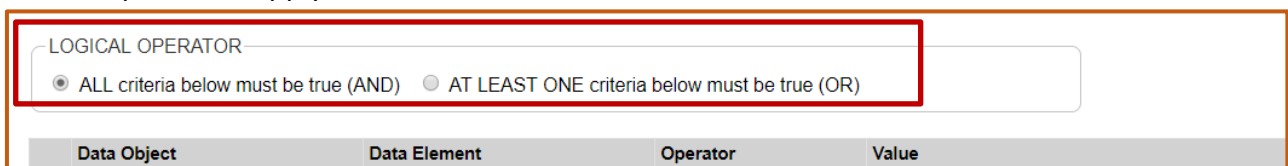
Enter a *Value*, click *Add*, and your criteria will appear below the matching headings in gray. In the example below, the letter “M” was entered for the *Value*:

Data Object	Data Element	Operator	Value		
<input checked="" type="checkbox"/> Beneficiary Contact	Beneficiary Last Name	STARTS WITH	M		

- Follow the steps above to expand upon your *Search Criteria*, if desired.
- You can click Search, or you can refine your search using the subsequent tabs.
  - **Important (!): For best results, limit your search criteria to just the information you need.**

## Logical Operator





When you have more than one string of criteria, STARS will ask you determine whether your collected criteria should narrow or expand your search under a LOGICAL OPERATOR heading. Below is a search with two data strings. Notice the LOGICAL OPERATOR heading. The default selection is “All criteria below must be true “(AND),” which narrows your search by the defined criteria. In the example below, the eventual search results would include all male beneficiaries whose age fit any of the age group values. To expand your search, select the second option and apply OR criteria.



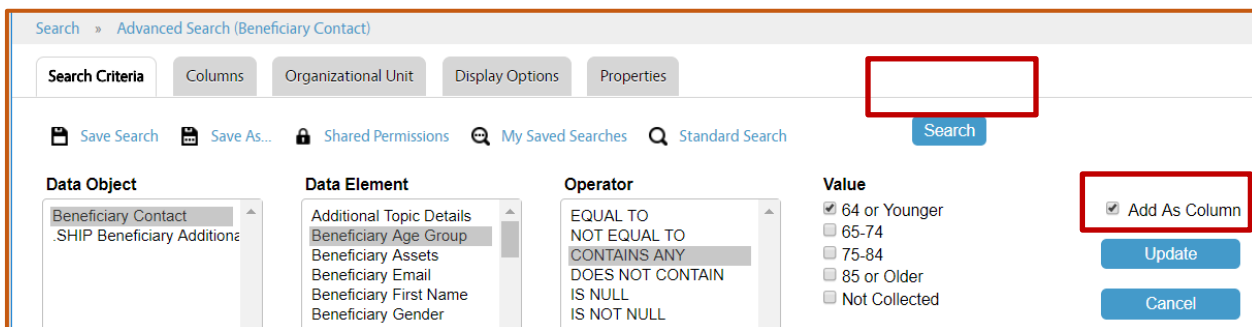
Data Object	Data Element	Operator	Value
<input checked="" type="checkbox"/> Beneficiary Contact	Beneficiary Gender	EQUAL TO	Male
<input checked="" type="checkbox"/> Beneficiary Contact	Beneficiary Age Group	CONTAINS ANY	<ul style="list-style-type: none"> <li>• 64 or Younger</li> <li>• 65-74</li> <li>• 75-84</li> <li>• 85 or Older</li> <li>• Not Collected</li> </ul>

## Edit or Delete Search Criteria

To edit or delete search criteria, click the pencil or X icons respectively.

Data Object	Data Element	Operator	Value		
<input checked="" type="checkbox"/> Beneficiary Contact	Beneficiary Gender	EQUAL TO	Male		
<input checked="" type="checkbox"/> Beneficiary Contact	Beneficiary Age Group	CONTAINS ANY	<ul style="list-style-type: none"> <li>• 64 or Younger</li> <li>• 65-74</li> <li>• 75-84</li> <li>• 85 or Older</li> <li>• Not Collected</li> </ul>		

In the example below, we had clicked the pencil icon for the “Beneficiary Age Group” data string. We limited the *Value* field to “64 or Younger.” Notice the check in that box below. Click “Update” to apply the edited criteria, then click “Search.”

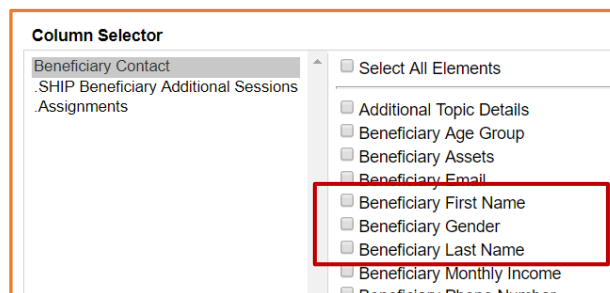


## Columns

To proceed, click the *Columns* tab. **For optimal system performance, please limit included columns to those that are absolutely necessary.** A large number of columns may lead to increased strain on system performance, potential slowdowns, and potential errors.

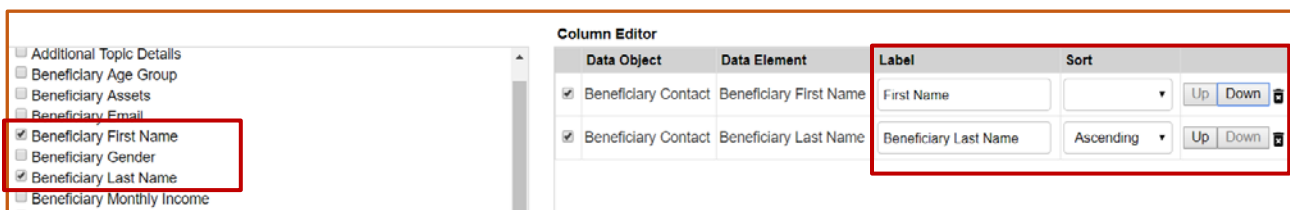
### Column Selector

In the *Columns* tab, you will use the “Column Selector” to select elements. To the right is an example from the Beneficiary Contact Form. We will select Beneficiary First Name and Beneficiary Last Name as an example by selecting the desired elements in the list of options.



### Column Editor

Now that our column elements are selected (Beneficiary First Name and Beneficiary Last Name), we can use the *Column editor* to edit or arrange them. The default *Label* will match the field name in STARS by default. Below, we have edited the *Label* for “Beneficiary First Name” to simply “First Name,” whereas the default label “Beneficiary Last Name” has been left alone.

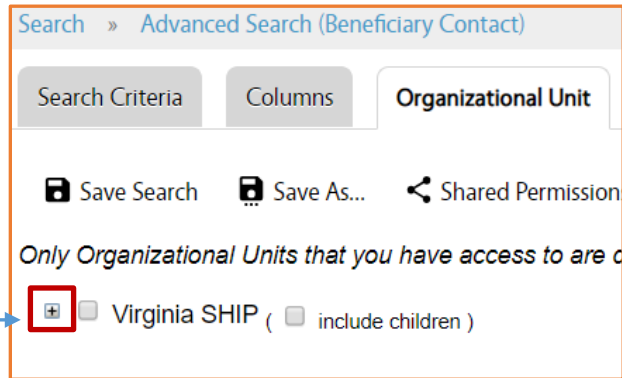


Use the *Sort* command to determine the order of data in your column. In this example, we selected “Ascending” for “Beneficiary Last Name.” Finally, the “Up” and “Down” buttons allow you change the order of the columns. In the example above, First name will appear first. Click “Down” if it you want it to appear second.

## Organizational Unit

This tab is particularly useful for users aligned at the state and sub-state level. It allows you to narrow your search according to the *Partner Organization Affiliation*. In this example, the team member is a state-level user for the Virginia SHIP (a test site in a test environment).

To see the sub-states and sites aligned below the Virginia SHIP, click the plus symbol. This will expand the hierarchy. Sub-states will have their own plus symbol. This symbol acts like a toggle. It becomes a minus symbol when expanded. Click on the minus to contract the view, and symbol will again become a plus.



In this example, we have selected the Virginia Sub-State 510 and the Virginia Site 1010 below it.

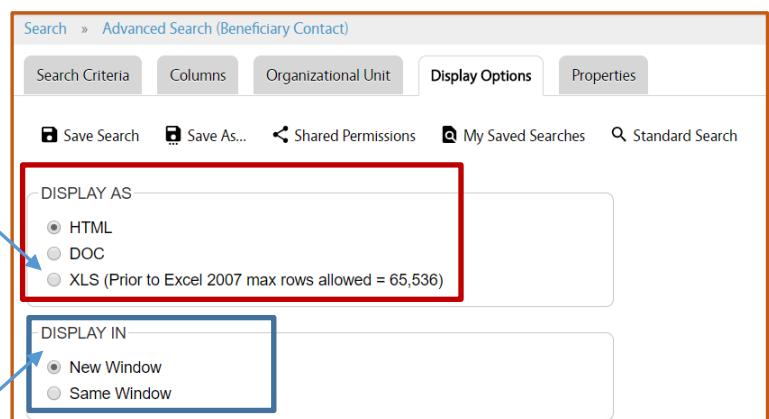
- Note: If you select *include children*, searches will include all Sub-States and/or Sites below.



## Display Options

In this tab, you determine whether you would like to see your search results within STARS and/or export them to Excel for data analysis and manipulation.

- DISPLAY AS:** The default setting is *HTML*. Use this option to view your results within STARS. Select *XLS* to export to Excel.
  - Note: If you select *XLS*, the “DISPLAY IN” box disappears.
- DISPLAY IN:** If you choose *HTML* for your DISPLAY AS option, the “DISPLAY IN” category is relevant.

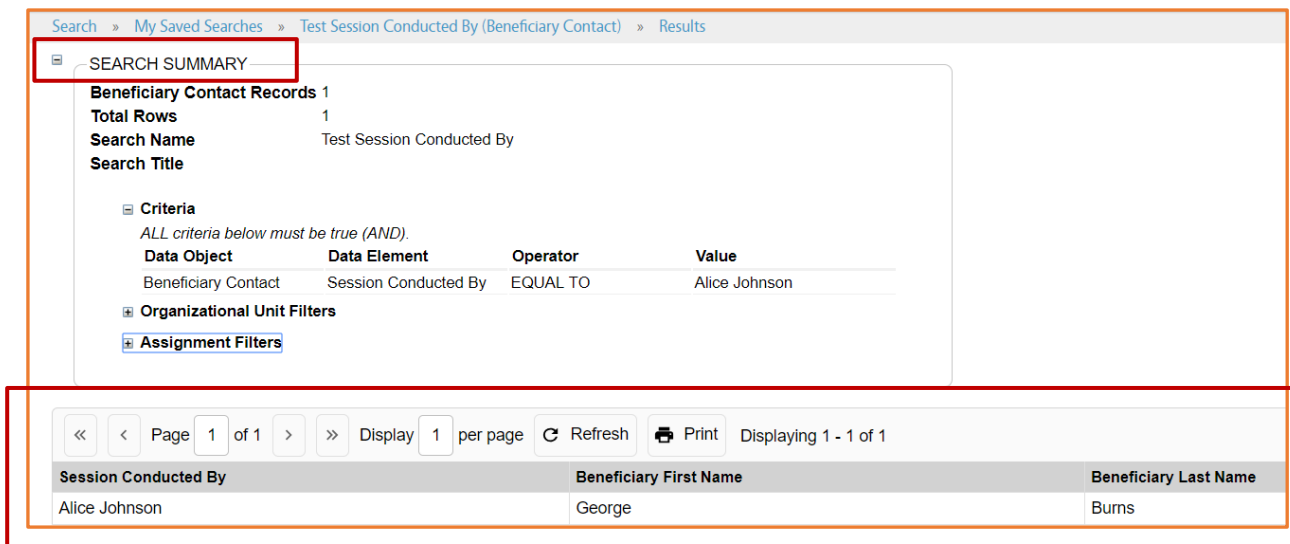


- “New Window” requires that your browser allows pop ups for this site. It will open your results in a new browser window.
- “Same Window” is preferred if your pop ups are blocked and you don’t know how to allow them. It will open your results in the same browser window.

## Search Results

### Display in HTML

In the example below, we are viewing sample search results that have been set to display as *HTML* (i.e. within the STARS window). The SEARCH SUMMARY appears by default, and you can collapse the SEARCH SUMMARY by clicking the minus symbol. The search results are in a grid below the summary. They are preceded by a row of commands allowing you modify the results display or print.



Search » My Saved Searches » Test Session Conducted By (Beneficiary Contact) » Results

**SEARCH SUMMARY**

Beneficiary Contact Records 1  
Total Rows 1  
Search Name Test Session Conducted By  
Search Title

**Criteria**  
ALL criteria below must be true (AND).

Data Object	Data Element	Operator	Value
Beneficiary Contact	Session Conducted By	EQUAL TO	Alice Johnson

**Organizational Unit Filters**  
**Assignment Filters**

Navigation: << < Page 1 of 1 > >> Display 1 per page Refresh Print Displaying 1 - 1 of 1

Session Conducted By	Beneficiary First Name	Beneficiary Last Name
Alice Johnson	George	Burns

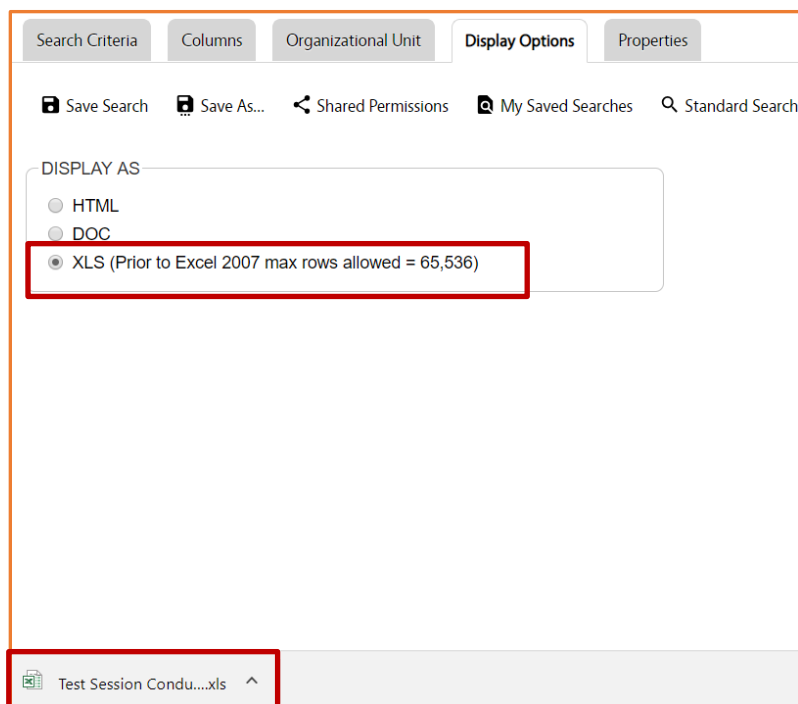
Use the ribbon above the SEARCH SUMMARY to go backward to previous pages. Click the desired blue hyperlinked text to return to that page, such as to modify your search:



Search » My Saved Searches » Test Session Conducted By (Beneficiary Contact) » Results

### Display in Excel (XLS)

When you choose this option, the downloaded Microsoft Excel file appears in the bottom left corner.



Search Criteria Columns Organizational Unit **Display Options** Properties

Save Search Save As... Shared Permissions My Saved Searches Standard Search

DISPLAY AS

☐ HTML  
☐ DOC  
☒ XLS (Prior to Excel 2007 max rows allowed = 65,536)

Test Session Condu...xls

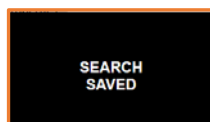
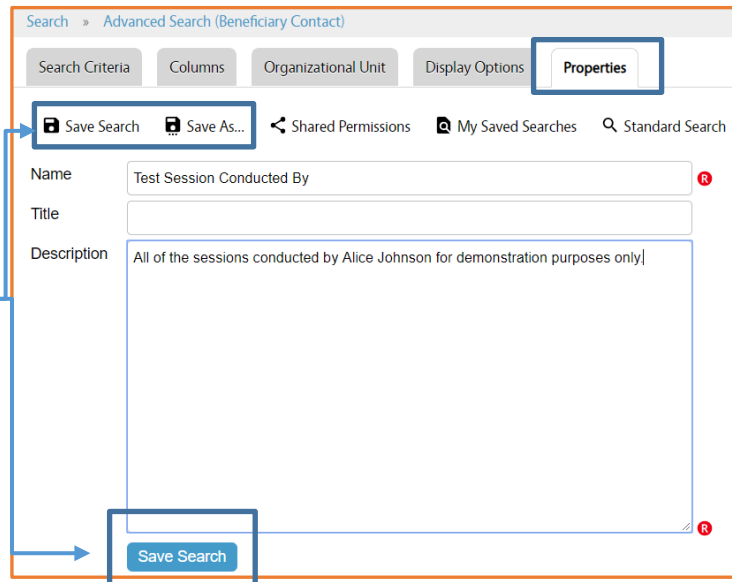
## Properties

Use this tab if you want to save or share your search, because a “Name” and “Description” are then required.

### Save Search

Click the blue Save Search button to save. You can also save using the black *Save Search* or *Save As* icons.

This message will appear upon saving:
























### Saved Searches

You can use the Search menu to find your saved searches.



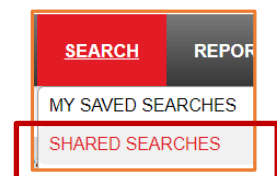
When you click on *My Saved Searches*, your searches appear in a table format.

My Saved Searches							
Shared Searches							
Dashboard Options							
	Name	Data Object	Description	Required Role	Created On	Last Updated On	
   	All Beneficiary Contacts	Beneficiary Contact	This is sample	SHIP Assistant Director	08/01/2018 12:29 PM	08/01/2018 12:28 PM	
   	All Team members	SHIP Team Member	All team members	SHIP Assistant Director	06/21/2018 11:38 AM	06/21/2018 11:38 AM	
   	Testing Advanced Search for Beneficiary Contact	Beneficiary Contact	Testing	SHIP Assistant Director	06/21/2018 11:30 AM	06/21/2018 11:31 AM	
   	Test Session Conducted By	Beneficiary Contact	All of the sessions conducted by Alice Johnson for demonstration purposes only.	SHIP Assistant Director	08/02/2018 03:04 PM	08/02/2018 03:04 PM	

Use the icons to edit, view, export, or delete saved searches. Click anywhere in the row to open a search. Use the clickable column headings to sort your searches.

### Shared Searches

Users can share searches with other users who share the same role. Searches are shared nationally, however. In the future, ACL and/or the SHIP TA Center will create searches to share nationally. This is where you will access them.

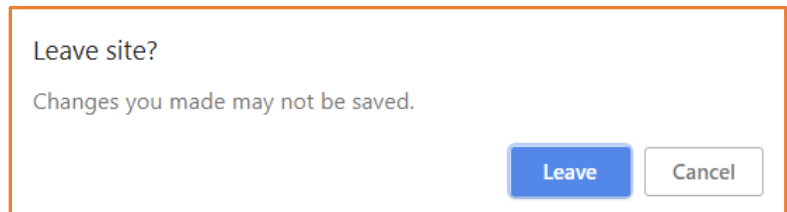


## Warning Messages

There are a variety of warning messages that may appear within the Search menu. Here are two examples and an explanation for each.

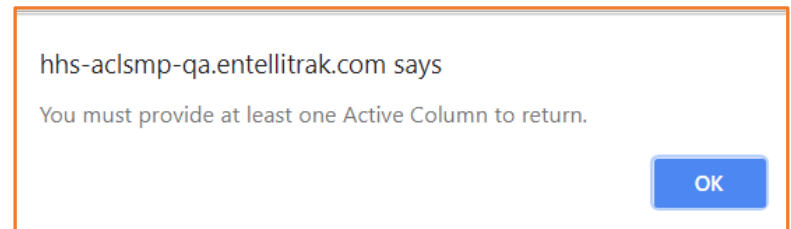
### Leave Site warning

In this warning, “site” refers to the page you are viewing, not the STARS website as a whole. Click “Leave” to leave the page and “Cancel” to remain on the page.



### Active Column warning

In this case, STARS is telling you that you haven't added a column to your search. At least one column is required for an advanced search. Select OK to continue building your search.



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