

# STARS / SHIP Reporter Guide



ACL previously offered the NPR (National Performance Reporting) system to import the SHIP assessments that record all data through this program. ACL has implemented a web-based data system called STARS (SHIP Tracking and Reporting System). Due to the implementation of STARS, changes were required of the SAMS SHIP Reporter application.

STARS uses a single upload method instead of the batch upload method previously used by NPR. Therefore, the SAMS will now connect to the new STARS site via an API (Application Program Interface). Simply put, the API allows SAMS to directly communicate with STARS.

The purpose of this document is to offer users of SAMS and data coordinators a guide to follow regarding the changes made to the SAMS application to accommodate the new functionality.

## STEP 1: Add SHIP Counselor / Team Member Data in SAMS

STARS generates credentials when a user's "team member" account is created by SHIP Administrators. Users who are designated SHIP Counselors / Team Members need to be recorded in SAMS by SHIP Administrators.

For a SHIP Administrator to add Counselor information into SAMS, please use the following steps:

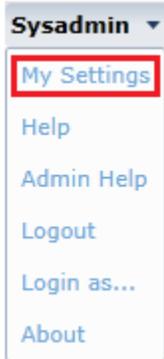
1. Go to Administrator > General > SHIP Counselors
2. Select Add New and fill in the information accordingly:
  - a. Name
  - b. SHIP eFile ID (provided by STARS)
  - c. Associated Provider
  - d. Mark if the user is Active or Inactive
  - e. The system will populate the Created and Last Updated data

Administrator - SHIP Counselors									
Care Plans	Sorted By Type		Add New   Open   Delete						
General	Row Actions	Active	Name	SHIP efile ID	Provider	Created	Last Updated		
Aliases		<input checked="" type="checkbox"/>	Mary Anderson	12345678		06/22/2012	06/22/2012		
SHIP Counselors		<input checked="" type="checkbox"/>	Tom Franklin	23467891		06/22/2012	06/22/2012		
Custom Fields		<input checked="" type="checkbox"/>	Sue Jones	34567891		06/22/2012	06/22/2012		
Diagnosis Codes		<input checked="" type="checkbox"/>	David Redding	45678912		06/22/2012	06/22/2012		
Languages		<input checked="" type="checkbox"/>							

## STEP 2: Add Defaults in My Settings

Once a SHIP Counselor has been added to the Administrator section of SAMS by an Admin, proceed to **My Settings** to set up the appropriate defaults.

- Under the user name in the upper right-hand corner of the screen, select *My Settings* from the dropdown menu:



- Under *Default Settings*, fill in the following fields:
  - Agency: this corresponds to Partner Agency Organization question in assessment
  - Provider
  - State
  - County
  - SHIP eFile ID: this corresponds to Session Conducted by question in assessment
  - Export SHIP – Beneficiary Info: check this box if you wish to send over this info to STARS. It is not required.
  - Export SHIP – Representative Info: check this box if you wish to send over this into to STARS. It is not required.
  - Include SHIP – Send to SMP: check this box if you wish to send over this info to SMP.

**Default Settings**

Agency

Provider   

Care Manager

Care Program   

State

County

Area Code

Service Delivery Month

Info Release Authorized

SHIP efile ID

Export SHIP - Beneficiary Info

Export SHIP - Representative Info

Include SHIP - Send to SMP

Module

Enable Roster Automatic Save

Roster Automatic Save Interval (Min)

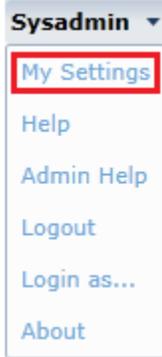
**NOTE:** A SAMS user does NOT have to have a SHIP eFile ID assigned by STARS in order to enter assessment data into SAMS. In many organizations SHIP Counselors do not enter data into SAMS.

For Example:

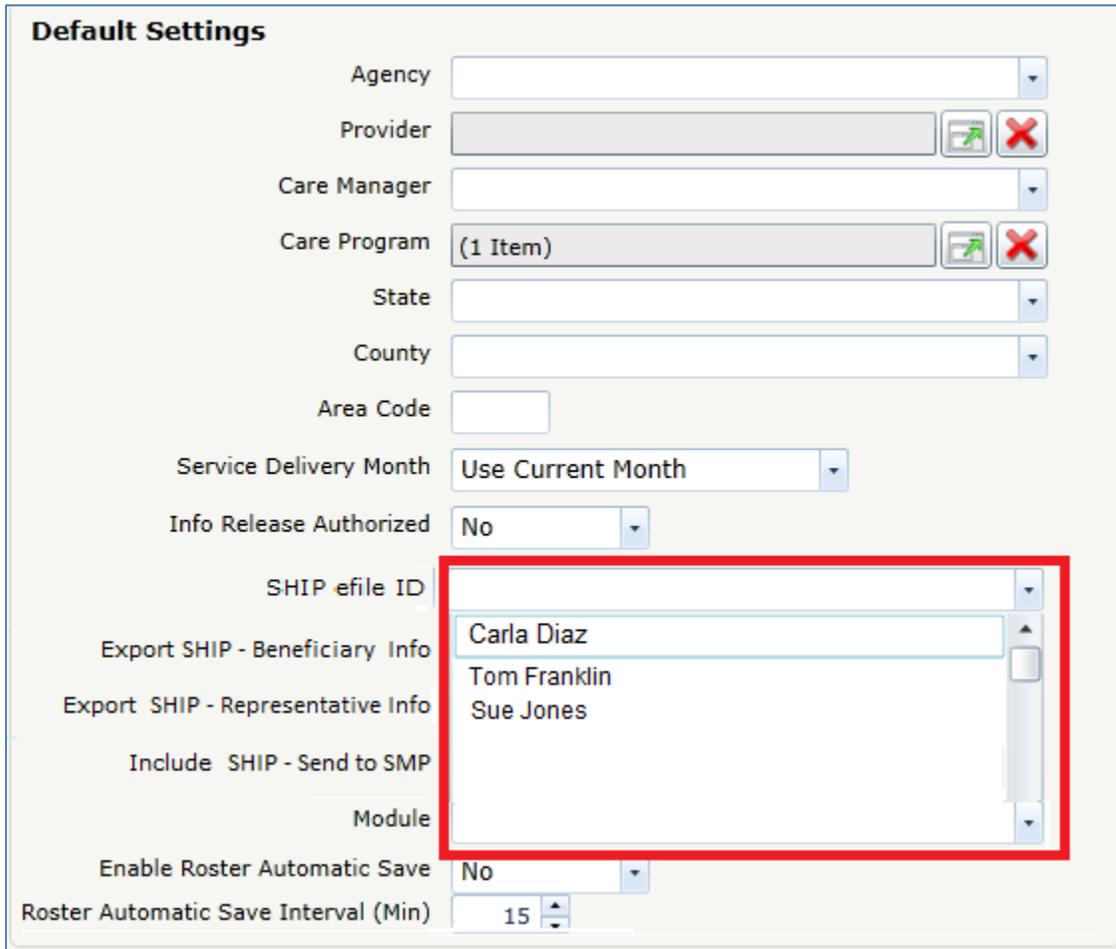
- Carla Diaz* is a SHIP Counselor and does not do any data entry in SAMS. She has a SHIP eFile ID and has been added to the Administrator SHIP Counselor section. She does not have a SAMS login.
- Amruta Shinde* is a data entry coordinator and does not have a SHIP eFile ID. She has a SAMS login.

Carla gives Amruta assessment data to enter into SAMS. Amruta first navigates to My Settings in SAMS:

1. Go to *My Settings*:



2. Under *Default Settings*, Amruta will select the SHIP eFile ID for Carla from the drop down list:

A screenshot of the 'Default Settings' form. The form contains several fields: Agency, Provider, Care Manager, Care Program (with '(1 Item)' selected), State, County, Area Code, Service Delivery Month (set to 'Use Current Month'), Info Release Authorized (set to 'No'), SHIP efile ID (with a dropdown list showing 'Carla Diaz', 'Tom Franklin', and 'Sue Jones'), Module, Enable Roster Automatic Save (set to 'No'), and Roster Automatic Save Interval (Min) (set to '15'). The SHIP efile ID dropdown is highlighted with a red box.

Once Carla is selected as the default, when Amruta goes to fill in assessment data the system will automatically populate the Session Conducted By question in the form with Carla's SHIP eFile ID.

\* How did the client learn about the SHIP?

(Not Answered)
  1. Previous Contact
  2. CMS / Medicare
  3. Presentations
  4. Mailings
  5. Another Agency
  6. Friend or Relative
  7. Media
  8. State Website
  9. Other
  99. Not Collected

\* Method of Contact

(Not Answered)
  1. Phone Call
  2. Face to Face at Counseling Location or Event Site
  3. Face to Face at Client's Home or Facility
  4. E-Mail
  5. Postal Mail or Fax

\* Session Conducted By  
 Carla Diaz

## Assessment Form Changes

The STARS system has replaced the former assessment forms as follows:

- Client Contact Data Form (ICC) has been renamed to:
  - *Beneficiary Contact Form*
- Public and Media Event Form (PAM) has been split into two forms:
  - *Group Outreach and Education Form*
  - *Media Outreach and Education Form*

The **Beneficiary Contact Form** is displayed in the Form Filename list when creating a new assessment.

New Assessment

Import from XML?  No  Yes

Form Filename: **Beneficiary Contact.afm**

Show All Forms?

OK  
Cancel

The **Group Outreach and Education Form** and **Media Outreach and Education Form** are located at: Tools > SHIP GAM Events (Group and Media Events):

Tools ▾ More

Print Blank Assessment Forms

Service Remap

SHIP - Exports

**SHIP - GAM Events**

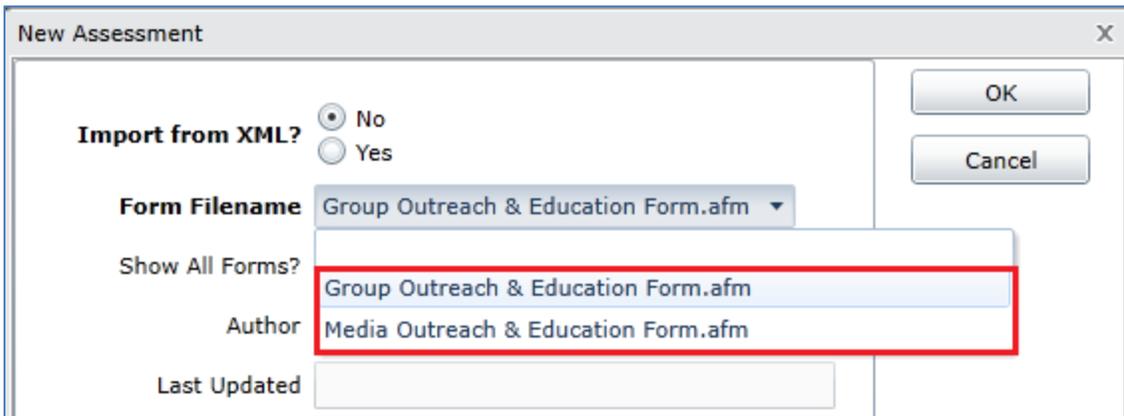
Click on the Add New link to create a new assessment:

GAM Events

Sorted By Date of Assessment **Add New** Open |

Row Actions	Date of Assessment ▾	Next Assessment Date ▾	Assessor Name ▾	Last Updated ▾	Updated By ▾	Assessmer
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Then select either the Group Outreach or Meida Outreach form:



## Auto-Populated Fields

If an assessment form is created for an existing SAMS consumer, the following data pertaining to the consumer will auto-populate the form:

- Beneficiary First Name
- Beneficiary Last Name
- Beneficiary Phone Number
- Beneficiary Email
- State of Beneficiary Residence
- Zip Code of Beneficiary Residence
- County of Beneficiary Residence
- Date of Contact: defaults to today's date
- Beneficiary Age Group
- Beneficiary Gender
- Beneficiary Race
- English as a Primary Language
- Beneficiary Monthly Income
- State of Event
- County of Event

## Export Data From Assessment Form (NEW FEATURE)

A newly implemented Export link gives SAMS users the ability to export an assessment directly from within the assessment.

**Note:** An assessment can only be exported from this location IF it passes the verification checks. If the assessment fails the checks, a message window is displayed notifying the user of the failed scenario. If the assessment passes the checks, then a message window displaying "Assessment form has been successfully exported to STARS" is provided.

Click on the Export link in the toolbar to send assessment data to STARS:



Once the assessment is exported from the form itself, it is then listed accordingly in the SHIP Exports screen:

SHIP Exports						
Sorted By Created						
Row Actions	Export ID	Export Type	Agency	Provider	Description	Star
 	1411	GroupOutreach	Spectrum Generations		May 1 thur May 05/0	

## Export Data from SHIP Export Screen

The SHIP Export screen is located at: Tools > SHIP - Exports



The SHIP Export screen has the following additions:

- The *Export Grid* link is now called *Export All*. User can export all the assessments listed at once by clicking this link.
- A new link named *Export* has been added that allows users to export just one assessment from the list, or those that have been multi-selected.

**Note:** Since a user can now export data from within an assessment, those assessments that were previously exported will have a date listed in the newly created *Exported Date* column. *Keep in mind the filter icon, by selecting it in the Exported Date column, those assessments already sent over to STARS can be filtered out.*

To export assessment data to STARS, follow the steps below:

1. Go to Tools > SHIP – Exports.
2. Click on the *Add New* link.

The screenshot shows the 'Generate Export' screen with the following fields and options:

- Search | Clear All Filters | Close
- Type: [Dropdown menu]
- Agency: [Dropdown menu]
- Provider: [Dropdown menu]
- Description: [Text input field]
- Note: *The start and end date apply to the Assessment date, not the event/contact date.*
- Start Date: [Enter date] [Calendar icon]
- End Date: [Enter date] [Calendar icon]

3. Select the *Type* of assessment to be downloaded:

<b>Type</b>	▼
<b>Agency</b>	Beneficiary Contacts
<b>Provider</b>	Group Outreach and Education
	Media Outreach and Education

4. Select *Agency* and/or *Provider*.
5. Add a *Description* if preferred.
6. Select the *Start Date* and *End Date*.
7. Click on the *Search* link to pull up the appropriate records.

Row Actions	ID	Name	Assessment Date	Exported Date	Last Updated	Created
	1349089444	Albert, Marie	03/30/2018		3/30/2018 12:02:22 P	3/30/2018 12:02:22 PM
	1306934957	Bard, Maurice	03/15/2018	4/10/2018	3/15/2018 10:53:21 A	3/15/2018 10:53:21 AM

## Summary Reports

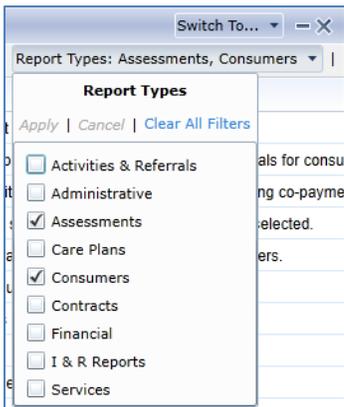
The SAMS Summary Reports that pertain to SHIP data have also undergone revisions, but the functionality has not changed. These reports now reflect the data collected in the new assessment forms.

- Client Contact Summary Report has been renamed the *Beneficiary Contact Form Summary Report*
- PAM Summary Report has been split into two new forms:
  - *Group Outreach and Education Summary Report*
  - *Media Outreach and Education Summary Report*
- SHIP Export Summary Report – this report name has not changed

To access the Summary Reports, click on the Reports tab in the toolbar at the top of the screen:

Rosters	<b>Reports</b>	Tools
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Filter the reports to show "Assessments" and "Consumers" type.



Below are the four summary reports.

+	Consumers	SAMS Beneficiary Contact Form Summary Report
+	Consumers	SAMS Group Outreach and Education Form Summary Report
+	Consumers	SAMS Media Outreach and Education Form Summary Report
+	Assessments	SHIP Export Summary Report (PLEASE SPECIFY CLIENT CONTACT OR PAM USING REPORT SETTINGS)

**Note:** A new report setting parameter has been added to allow reporting per "Session Conducted By" which equates to the SHIP eFile ID.

## Exported Assessment Form Revisions

Please note that once an assessment is exported to STARS from SAMS, no changes can be made to it in the Export screen. If a user tries to revise, s/he will be alerted with the message "Any changes need to be made directly in the STARS site."

It is recommended that the STARS site be bookmarked to your favorites, the url is:

<https://stars.entellitrak.com>

## To Note

- NPR will become read-only on October 1, 2018 and will be turned off completely on November 30, 2018.
- NPR Data will be moved to the state-level in STARS, so only state-level users shall be able to see and search that data.
- All October data should be sent by API.
- Please note that once an assessment is exported to STARS from SAMS, no changes can be made to it in the Export screen. If a user tries to revise, s/he will be alerted with the message "Any changes need to be made directly in the STARS site."

## Next Steps

- WellSky to finish up implementation of the API and update the pilot sites ASAP. In addition, ensuring data from the consumer detail screen autopopulates the assessment form.

- In the meantime, states with pilot sites are asked to review the assessment forms and functionality and provide feedback to [lisa.sherman@wellsky.com](mailto:lisa.sherman@wellsky.com).
  - HI – Executive Office on Aging
  - ME – Southern Maine Office on Aging
  - NJ – Division of Aging and Community Services
  - TX – Health and Human Services Commission
  - WI – Area Agencies on Aging