

**For RTCs and VCs to monitor and track performance measures set forth in the contract between the SHIBA sponsor organization and OIC.**

First report can help [monitor performance](#) by sponsor or a group of sponsors throughout the reporting period, i.e. month (SHIP) or quarter (SMP).

The last report is what ACL, our primary federal funding agency, sees and [deems creditable](#) towards meeting the performance measures.

**For both reports, log in to STARS:**

<https://acl.entellitrak.com/etk-hhs-acl-prod/page.request.do?page=page.starshome>

**For use intermittently throughout reporting period:**

### **Step 1**

- Select 'Search' from Menu bar
- Select 'Beneficiary Contact', then 'Advance Search'

Under 'Search Criteria' tab:

- Data Object: Select 'Beneficiary Contact'
- Data Element: Select 'Date of Contact'
- Operator: Select 'BETWEEN'
- Value: Select or enter '07/01/2018' and '09/30/2018'  
(Example is for third quarter of 2018, July 1 – Sept. 30)

Then select the blue 'Add' button to right (with 'Add as Column' selected')

The screenshot shows the 'SEARCH' tab in the SHIBA application. The breadcrumb trail is 'Search > Advanced Search (Beneficiary Contact)'. Below the breadcrumb are tabs for 'Search Criteria', 'Columns', 'Organizational Unit', 'Display Options', and 'Properties'. The 'Search Criteria' tab is active, showing a search rule configuration. The rule is defined by four columns: 'Data Object', 'Data Element', 'Operator', and 'Value'. The 'Data Object' is 'Beneficiary Contact', the 'Data Element' is 'Date of Contact', the 'Operator' is 'BETWEEN', and the 'Value' is '07/01/2018 and 09/30/2018'. A green 'Add' button is visible on the right side of the configuration area. Below the configuration area is a table summarizing the search criteria.

Data Object	Data Element	Operator	Value
<input checked="" type="checkbox"/> Beneficiary Contact	Date of Contact	BETWEEN	07/01/2018 and 09/30/2018

## Step 2

Under 'Organizational Unit' tab:

- Select your organization (it may be the only one listed depending on your role)

The screenshot shows the 'Organizational Unit' tab in the SHIBA application. The breadcrumb trail is 'Search > My Saved Searches > Quarterly BC Report - ALTCEW (Beneficiary Contact)'. Below the breadcrumb are tabs for 'Search Criteria', 'Columns', 'Organizational Unit', 'Display Options', and 'Properties'. The 'Organizational Unit' tab is active, showing a list of organizations. The list is titled 'Only Organizational Units that you have access to are displayed below.' and includes the following options: Washington SHIP (include children), Tri-Cities Community Health, AARP Washington Fraud Fighter Call Center, Aging & Long Term Care of Ea Wa (checked), and American Indian Health Commission.

### Step 3

Under 'Columns' tab:

- Column Selector: Select 'Beneficiary Contact'

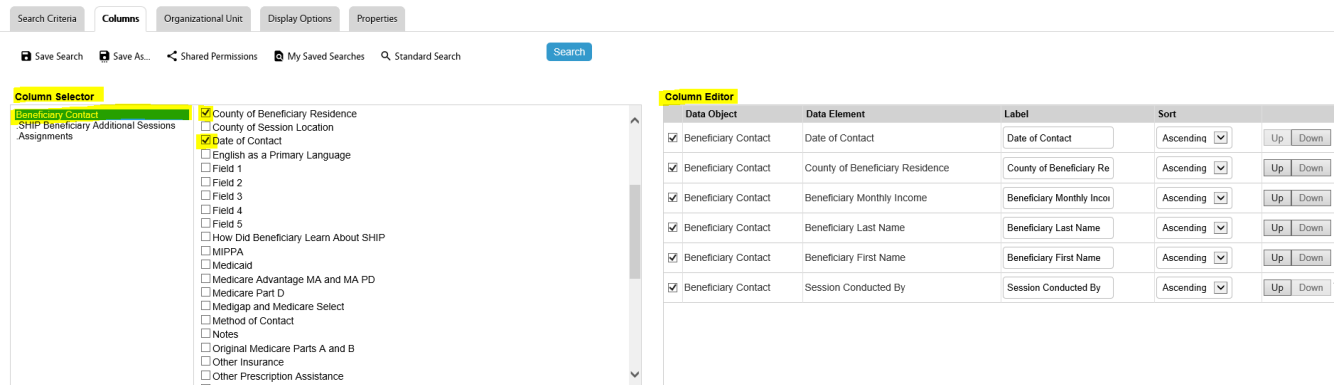
Select the following Elements:

- SHIP Case number
- Date of Contact
- County of Beneficiary Residence
- Beneficiary Monthly Income
- Beneficiary Last
- Beneficiary First
- Session conducted by
- Send to SIRS (for SMP contractors)
- MIPPA (for MIPPA contractors)

As the elements are selected you will see them populate in the 'Column Editor' to the right.

- Column Editor: Sort all as 'Ascending'

*(The first Data Object listed in the Column Editor is the primary sort field)*



The screenshot shows the 'Columns' tab in the SHIBA system. The 'Column Selector' on the left lists various data elements, with 'Beneficiary Contact' and 'Date of Contact' selected. The 'Column Editor' on the right displays a table of the selected elements, all sorted in ascending order.

Data Object	Data Element	Label	Sort	Up	Down
<input checked="" type="checkbox"/>	Beneficiary Contact	Date of Contact	Date of Contact	Ascending	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input checked="" type="checkbox"/>	Beneficiary Contact	County of Beneficiary Residence	County of Beneficiary Re	Ascending	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input checked="" type="checkbox"/>	Beneficiary Contact	Beneficiary Monthly Income	Beneficiary Monthly Inco	Ascending	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input checked="" type="checkbox"/>	Beneficiary Contact	Beneficiary Last Name	Beneficiary Last Name	Ascending	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input checked="" type="checkbox"/>	Beneficiary Contact	Beneficiary First Name	Beneficiary First Name	Ascending	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input checked="" type="checkbox"/>	Beneficiary Contact	Session Conducted By	Session Conducted By	Ascending	<input type="button" value="Up"/> <input type="button" value="Down"/>

## Step 4

Under 'Display Options' tab:

- Select 'Display as' XLS

The screenshot shows a search interface with several tabs: 'Search Criteria', 'Columns', 'Organizational Unit', 'Display Options', and 'Properties'. The 'Display Options' tab is active. Below the tabs, there are several action buttons: 'Save Search', 'Save As...', 'Shared Permissions', 'My Saved Searches', and 'Standard Search', along with a 'Search' button. Below these buttons, there is a section labeled 'DISPLAY AS' with three radio button options: 'HTML', 'DOC', and 'XLS (Prior to Excel 2007 max rows allowed = 65,536)'. The 'XLS' option is selected.

## Step 5

Under 'Properties' tab:

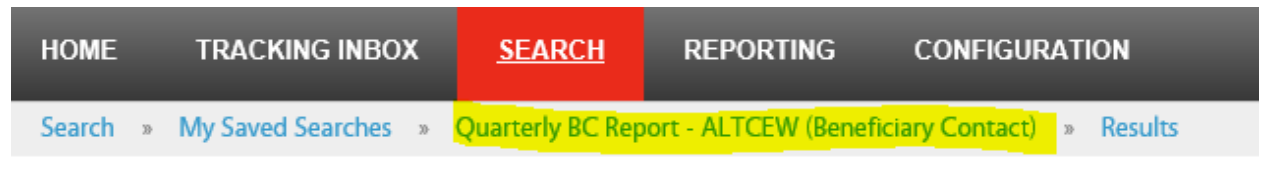
- Complete Name and provide Description (required fields). Title is optional.
- Select 'Save Search'

## Step 6

Press 'Search', then select 'Open' at the bottom.

The screenshot shows a file dialog box with the text: "Do you want to open or save Quarterly BC Report - ALTCEW.xls from acl.entellitrak.com?". There are four buttons: 'Open', 'Save', 'Cancel', and a close button (X).

If your report appears as HTML (still in STARS), select the saved search name from the *cookie crumb* menu:



Then, select 'Display Options' tab and 'Display As' XLS. Then select 'Search'.

### Step 7

The Excel spreadsheet link will appear in the bottom left corner of the screen. Select to open the spreadsheet.

Format Excel spreadsheet for optimum viewing and sorting.

- Click in the top left of the table to select the entire spreadsheet.

	A	B	C	D	E	F	G	H
1	Date of	County	Benefici	Benefici	Benefici	Session	Conducted	By
2	#####	Spokane - WA	At or Above 150% FPL		GREG	Robert Ball		
		Spokane - WA	At or Above 150% FPL			Robert		

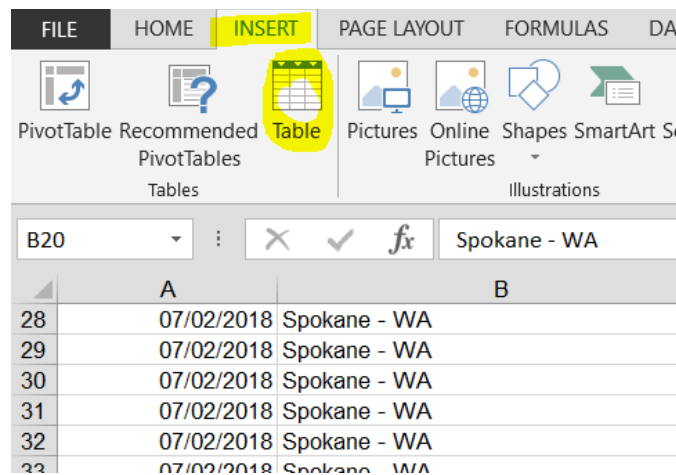
Resize columns and rows:

- Double-click on any column border between the column letters at top.
- Double-click on any row border between the row numbers at the left.

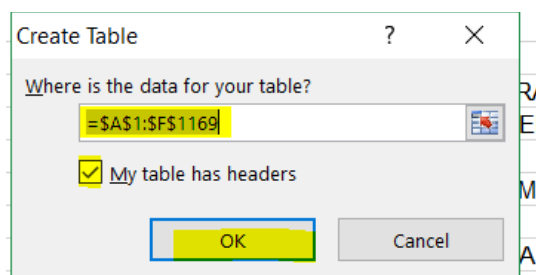
	A	B	C	D	E	F
1	Date of Contact	County of Beneficiary Residence	Beneficiary Monthly Income	Beneficiary Last Name	Beneficiary First Name	Session Conducted By
2	07/01/2018	Spokane - WA	At or Above 150% FPL		GREG	Robert Ball
3	07/01/2018	Spokane - WA	At or Above 150% FPL		JOHN	Robert Ball
4	07/01/2018	Spokane - WA	At or Above 150% FPL		WILLIAM	Robert Ball
5	07/01/2018	Spokane - WA	At or Above 150% FPL		BINAM	Robert Ball
6	07/01/2018	Spokane - WA	At or Above 150% FPL		CARSEY	Bradley Johnson
7	07/01/2018	Spokane - WA	At or Above 150% FPL		COSMO	Cheryl Kingen
8	07/01/2018	Spokane - WA	At or Above 150% FPL		EDWARDS	Robert Ball
9	07/01/2018	Spokane - WA	At or Above 150% FPL		HALCOH	Robert Ball

Make table sortable:

- Click in any cell within table range; make sure there are no blanks in the column where the cursor is placed
- Select the 'Insert' tab at the top.
- Select 'Table'



- Generally, this feature will identify just the area with data. Make sure the 'My table has headers' is selected. Then select 'OK'.



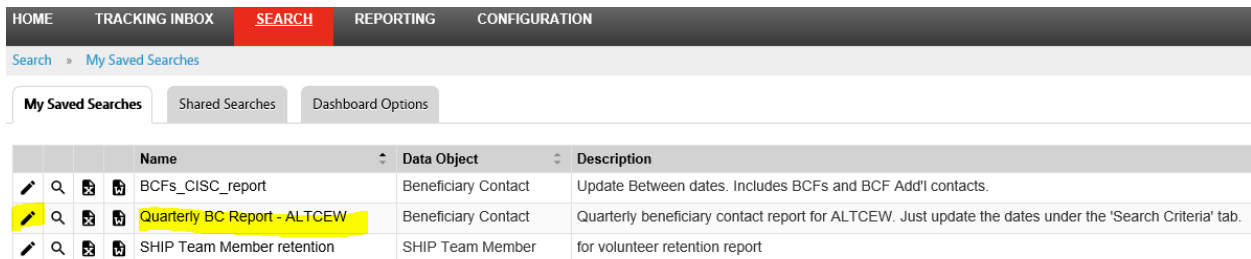
- The table can now be sorted using the arrow buttons to right of column you want to sort.

A	B	C	D	E	F
Date of Contact	County of Beneficiary Residence	Beneficiary Monthly Income	Beneficiary Last Name	Beneficiary First Name	Session Conducted By
07/01/2018	Spokane - WA	At or Above 150% FPL		GREG	Robert Ball
07/01/2018	Spokane - WA	At or Above 150% FPL		JOHN	Robert Ball
07/01/2018	Spokane - WA	At or Above 150% FPL		WILLIAM	Robert Ball
07/01/2018	Spokane - WA	At or Above 150% FPL	BINAM	CATHY	Robert Ball
07/01/2018	Spokane - WA	At or Above 150% FPL	CARSEY	PAMALA	Bradley Johnson
07/01/2018	Spokane - WA	At or Above 150% FPL	COSMO	ROBERT	Cheryl Kincaen

## Step 8

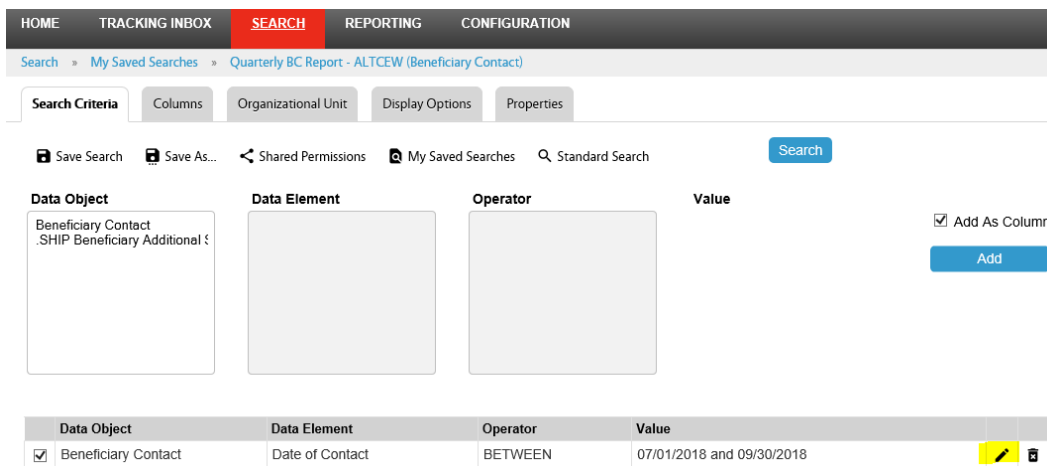
Access saved searches under the 'Search' tab:

- Select 'My Saved Searches'
- Change the dates of the search by selecting the 'edit pen' icon to the left of the report.



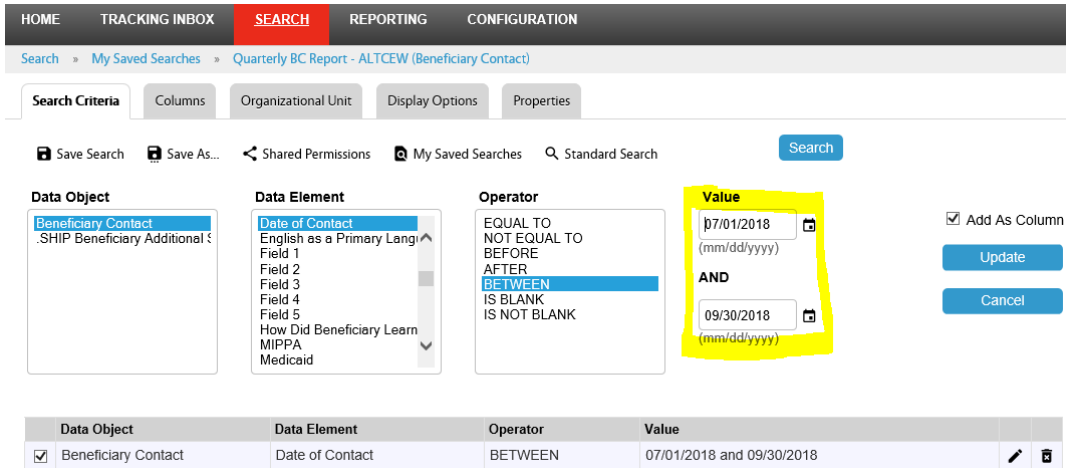
	Name	Data Object	Description
	BCFs_CISC_report	Beneficiary Contact	Update Between dates. Includes BCFs and BCF Add'l contacts.
	Quarterly BC Report - ALTCEW	Beneficiary Contact	Quarterly beneficiary contact report for ALTCEW. Just update the dates under the 'Search Criteria' tab.
	SHIP Team Member retention	SHIP Team Member	for volunteer retention report

- Select the 'edit pen' to the right of the Beneficiary Contact 'Data Object'



Data Object	Data Element	Operator	Value
<input checked="" type="checkbox"/> Beneficiary Contact	Date of Contact	BETWEEN	07/01/2018 and 09/30/2018

- Update the dates under 'Value'.



Data Object	Data Element	Operator	Value
<input checked="" type="checkbox"/> Beneficiary Contact	Date of Contact	BETWEEN	07/01/2018 and 09/30/2018

- Select the 'Display Options' tab to select 'Display As' XLS.
- Select 'Search'

Follow **Step 7** to format spreadsheet for viewing and sorting.

**The following report is what ACL records as creditable toward performance measures:**

RTCs and VCs: Work with the Grants and Budget Coordinator to resolve any discrepancies or get clarification on a discrepancy.

**Step 1**

- Select 'Configuration' from Menu bar
- Select 'Pages', then 'Shared Pages'
- Select 'SHIP Performance Measures Report – State and User'



My Account Change Role Sign Out Help

HOME TRACKING INBOX SEARCH REPORTING **CONFIGURATION**

Configuration > Pages > Shared Pages >

Shared Pages Dashboard Options

Name	Description
▶ 1-800 Medicare Unique IDs Report - State	This launch page launches the 1-800 Medicare Unique IDs Report - State.
▶ MIPPA Performance Measures Report - State and User	This launch page launches the MIPPA Performance Measures Report - State and User
▶ Resource Report - User	This launch page launches the User Resource Report for State, Sub-state, and Site users in STARS.
▶ SHIP Performance Measures Report - State and User	This launch page launches the SHIP Performance Measures Report - State and User

VCs: can only see their own organization

RTCs: can see all organizations, including MIPPA-only organizations

Complete the online query fields and then select 'Launch Report'.



1)\* Please select your State, Sub-State, or Site:

State / Sub-state / Org:

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

2)\* Please select a format. It is recommended you use the default setting (Microsoft Excel).

Microsoft Excel - (Recommended)

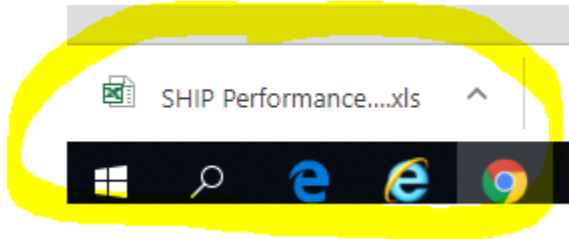
PDF

Rich Text File (rtf)

HTML

Launch Report

The report document will appear as an icon at the bottom, left of the screen.  
Click to open the report in the selected format.



VCs will receive a summary report for the period of time they selected.

SHIP Performance Measures Report - Tri-Cities Community Health

User  
Date 04/01/201 - 06/30/201  
Range: 9 9



		Previous Date	Current Date Range	
Site Name	Performance Measure	Total # Reached	Total # Reached	% Change in Total # Reached
Tri-Cities	PM 1: Beneficiary Contacts	1	187	18,600%
Tri-Cities	PM 2: Group Outreach Contacts	0	15	100%
Tri-Cities	PM 3: Medicare Beneficiaries Under 65	0	47	100%
Tri-Cities	PM 4: Total Hard-to-Reach Contacts	0	58	100%
Tri-Cities	PM 5: Enrollment Contacts	1	122	12,100%

\* Previous 04/01/2018 - 06/30/2018

RTCs have access to statewide reports by County. Select 'Washington SHIP' in the State/Sub-state/Org dropdown box for statewide performance by County.



1)\* Please select your State, Sub-State, or Site:

State / Sub-state / Org:

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

2)\* Please select a format. It is recommended you use the default setting (Microsoft Excel).

- Microsoft Excel - (Recommended)
- PDF
- Rich Text File (rtf)
- HTML

[Launch Report](#)

In addition to the statewide summary by Performance Measure (PM), the statewide report shows performance measure results by County for each of the PMs. See tabs at bottom of the workbook.

State Summary	<b>PM1</b>	PM2	PM3	PM4.Totals	PM4.1	PM4.2	PM4.3	PM5
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State Name	County FIPS	County Name	County Designation	Previous Year	Current		date	range	% Change in Reached
				Total # Reached	Medicare Population	Total # Reached	Penetration Rate %		
Washington	53001	Adams	MIC	10	2,402	18		0.75%	80.00%
Washington	53003	Asotin	SM	33	5,892	20		0.34%	-39.39%
Washington	53005	Benton	MM	505	31,480	81		0.26%	-83.96%
Washington	53007	Chelan	SM	183	15,976	97		0.61%	-47.00%
Washington	53009	Clallam	MIC	189	24,192	130		0.54%	-31.22%
Washington	53011	Clark	LFM	1,126	78,709	1,417		1.80%	25.84%
Washington	53013	Columbia	SM	33	1,222	3		0.25%	-90.91%
Washington	53015	Cowlitz	SM	244	24,402	885		3.63%	262.71%
Washington	53017	Douglas	SM	81	7,596	50		0.66%	-38.27%
Washington	53019	Ferry	OUT	13	2,102	37		1.76%	184.62%
Washington	53021	Franklin	MM	154	9,342	101		1.08%	-34.42%
Washington	53023	Garfield	OUT	18	613	21		3.43%	16.67%
Washington	53025	Grant	MIC	138	14,687	66		0.45%	-52.17%
Washington	53027	Grays Harbor	MIC	204	17,988	154		0.86%	-24.51%
Washington	53029	Island	MIC	169	20,986	225		1.07%	33.14%
Washington	53031	Jefferson	OUT	171	11,635	40		0.34%	-76.61%
Washington	53033	King	LCM	5,491	298,585	3,999		1.34%	-27.17%
Washington	53035	Kitsap	MM	433	50,396	355		0.70%	-18.01%
Washington	53037	Kittitas	MIC	85	7,776	61		0.78%	-28.24%
Washington	53039	Klickitat	OUT	179	5,675	54		0.95%	-69.83%
Washington	53041	Lewis	MIC	597	19,293	467		2.42%	-21.78%
Washington	53043	Lincoln	OUT	33	2,881	32		1.11%	-3.03%

RTCs: Several columns have merged cells that have to be un-merged before applying the Excel tips provided (p.5 – p.6).