SHIP
State Health Insurance Assistance Program
Technical Assistance Center

Beneficiary Contacts

Field Guide

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INTRODUCTION

About This Guide

This guide is a companion to the STARS Manual, Chapter 4: Beneficiary Contacts. While the STARS Manual provides comprehensive definitions and technical details for beneficiary contacts, this guide narrows in on the essentials that matter most for everyday data entry. It covers the definition of a beneficiary contact, clarifies when to complete a Beneficiary Contact Form (BCF) or Beneficiary Additional Sessions (BAS) form, and explains the fields that team members most often have questions about.

This guide is written for Team Members and STARS Submitters, the two user roles most directly responsible for entering beneficiary contacts:

- Team Members can create and edit BCFs and BAS forms for their own work. They can also edit forms created by others if the form documents their own efforts (for example, if their name is in the Session Conducted By field). However, they cannot add Additional Sessions or Additional Team Members to forms created by others.
- STARS Submitters have the same capabilities as Team Members but are limited to Standard Searches (they cannot use Advanced Search).

With this guide, both roles can more confidently decide when to complete a BCF or BAS, correctly enter the fields that commonly cause errors, and make sure SHIP and MIPPA data reflect the services provided to beneficiaries.

🧭 Note: This guide is not a substitute for the STARS Manual. It is designed as a companion tool to make field-level data entry easier and more consistent. When in doubt, refer to Chapter 4 of the STARS Manual for the official guidance.

Beneficiary Contact Basics

Definition

A beneficiary contact is an interaction during which a beneficiary or their representative provides information about their Medicare and related insurance needs. The certified SHIP team member provides information about Medicare and SHIP services. An information exchange takes place. Scheduling, leaving messages, or making a referral without discussing Medicare or SHIP does not count as a beneficiary contact.

Examples and Non-Examples

Beneficiary Contact	NOT a Beneficiary Contact
After receiving a letter with program information, a beneficiary calls you to discuss the SHIP program.	You mail a letter to a beneficiary and never communicate with them again.
You returned a beneficiary's call and had a conversation about Medicare.	You talk to a beneficiary only to schedule an appointment.
You speak with a beneficiary in person and discuss their Medicare options.	You refer the beneficiary to another agency and do not discuss anything else.
You speak with a beneficiary one-on-one in a SHIP office and help them navigate a Medicare issue.	You spoke to a beneficiary during a general Q&A session without any individual counseling about their individual situation.
You interact during an appointment with the beneficiary and discuss SHIP services.	You leave a voicemail for a beneficiary about Medicare, and there's no return call.

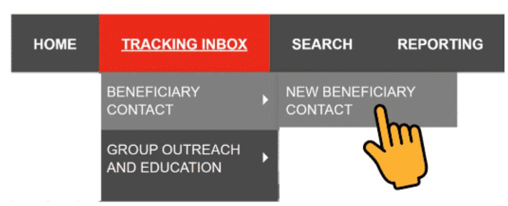
Beneficiary Contact Form (BCF) & Beneficiary Additional Sessions (BAS) Form

Purpose

SHIPs collect data on beneficiary contacts on the Beneficiary Contact Form (BCF) and the Beneficiary Additional Sessions (BAS) form. In your work, you may assist beneficiaries with the same SHIP or MIPPA issue in multiple sessions. Data on these complex cases can be entered on the BAS, which reduces the burden of reentering some data previously recorded on the BCF.

Accessing the BCF

After logging into STARS, click on Tracking Inbox, then hover over Beneficiary Contact to reveal the New Beneficiary Contact button. Click this option to open a new BCF.



BCF and BAS Comparison

BCF	BAS
Same team member, same day, same issue	Different day, same team member, same issue
Same day, same issue, different team member	
Same team member, different day, different issue	
Same issue, different day, different team member	

An "issue," in terms of beneficiary contacts, is the reason the person requires your assistance. For example, at the start of each Open Enrollment period, the first session to compare Medicare Part D plans with a beneficiary count as a new issue and must be entered on a BCF. If that person comes back for more sessions before choosing a plan, record those later visits on a BAS form.

Tips

- It is never wrong to create a new BCF instead of a BAS form for additional contacts.
- BCF and BAS count the same for performance measures.
- Use a BAS only for follow-ups on the same issue. Do not use the Notes field to replace a BAS.
- Each BAS requires answering the MIPPA question again.
- If your role doesn't allow you to add a BAS, enter a new BCF. It is never wrong to complete a BCF.

MIPPA

Purpose

The MIPPA field allows ACL to track and report how many people SHIPs are helping with low-income benefits and preventive services.

What to Do

- Select **Yes** if you (or the person who conducted this beneficiary contact) meet the following conditions:
    a) Are involved in the MIPPA program, and
    b) Discussed a MIPPA-qualifying topic.
- Select **No** if you (or the person who conducted this beneficiary contact) did not discuss any MIPPA-qualifying topics. Non-MIPPA team members will always select **No** for this field.

MIPPA-Qualifying Topics

Part D Low Income Subsidy (LIS/Extra Help)

Application Assistance

Application Submission

Benefit Explanation

Eligibility/Screening

LINET/BAE

Additional Topics

Preventive Services

Medicaid

Benefit Explanation

Eligibility/Screening

Medicaid Application Assistance

Medicaid Application Submission

Medicaid Recertification

Medicare Buy-In Coordination

MSP Application Assistance

MSP Application Submission

MSP Recertification

Tips

- If **Yes** is selected, the person entered in the Session Conducted By field must have MIPPA selected on their Team Member Form. Otherwise, STARS will issue a validation error, and the BCF will not be saved. Check with your supervisor about how to address this issue.
- If **Yes** is selected but you can't save the form, check that you selected one or more MIPPA qualifying topics under Topics Discussed.

Note: MIPPA-qualifying topics are defined in the STARS Manual, Chapter 4, Appendix.

SEND TO SMP

Purpose

The SMP field allows co-trained SHIP and SMP team members to flag and share beneficiary contacts that involve fraud, abuse, billing, or other SMP-qualifying issues, ensuring that these contacts are reflected in performance measures for both SHIP and SMP.

What to Do

- Select **Yes** if
  1. The contact fulfilled an aspect of the SMP mission,
  2. An SMP-qualifying topic was discussed, and
  3. You (or the person who conducted this beneficiary contact) are a co-trained SHIP and SMP team member.
- Select **No** if the contact did not fulfill an aspect of the SMP mission. *Non-SMP team members will always select No for this field*.

SMP-Qualifying Topics

Original Medicare (Parts A & B)

Accountable Care Organizations
Appeals/Grievances
Claims/Billing
Coordination of Benefits
Eligibility Enrollment/ Disenrollment
Fraud and Abuse
Provider Participation
QIO/Quality of Care

Part D Low Income Subsidy (LIS/Extra Help)

Appeals/Grievances
Claims/Billing

Medigap and Medicare Select

Claims/Billing
Complaints
Fraud and Abuse

Medicare Part D

Appeals/Grievances
Claims/Billing
Disenrollment
Enrollment
Fraud and Abuse
Marketing/Sales
Complaints & Issues

Medicaid

Appeals/Grievances
Claims/Billing
Fraud and Abuse
QMB Improper Billing

Medicare Advantage (MA and MA-PD)

Appeals/Grievances
Claims/Billing
Disenrollment
Dual Eligible Special Needs Plans
Enrollment
Fraud and Abuse
Supplemental Benefits
Marketing/Sales
Complaints & Issues
QIO/Quality of Care

Other Insurance

Marketplace Transition to Medicare

Additional Topic Details

Ambulance
Covid-19
Dental/Vision/ Hearing
DMEPOS
Home Health Care
Hospice
Hospital
Medicare Card
New to Medicare
Preventive Benefits
Skilled Nursing Facility
Substance Misuse/Fraud
Telehealth

Tips

- If **Yes** is selected, the person entered in the Session Conducted By field must have a SIRS eFile ID on their Team Member Form. If no SIRS eFile ID is present, STARS will issue a validation error, and the BCF will not be saved. Check with your supervisor about how to address this issue.
- Select every SMP-qualifying topic you covered, not just fraud/abuse (Examples: billing errors, marketing complaints, enrollment/disenrollment tied to fraud issues).
- It doesn't matter if fraud/abuse was discussed for 5 minutes or 50 minutes. What matters is that at least one SMP-qualifying topic was discussed.

  🧭 Note: SMP-qualifying topics are defined in the STARS Manual, Chapter 4, Appendix.

TIME SPENT

Time Spent in Hours		Enter Time Spent in Hours OR Minutes. Example: 1.5 hours Time Spent would be entered as either 1 Hour and 30 Minutes OR 0 Hour and 90 Minutes.
Time Spent in Minutes		
Total Time Spent (minutes)	*	

Purpose

The Time Spent field captures the time team members devoted to helping a beneficiary, both during and outside the counseling conversation, so that national reports show not only the number of contacts but also the time and depth of work involved.

What to Do

Enter the hours and/or minutes you spent counseling the beneficiary or representative, plus the time spent working on their behalf. As long as counseling occurs, performing any of the activities below should also be included in Time Spent.

Talking with the beneficiary or representative

Researching plans or policies

Preparing or submitting forms

Calling agencies on their behalf

Waiting for or trying to reach them

Preparing materials for them

Travel time for in-person counseling

Enter Time Spent

Enter the time in whole numbers as hours and/or minutes. For example, if your counseling and other activities total 1 hour and 45 minutes, you could record that as hours and minutes or just minutes.

Time Spent in Hours	
Time Spent in Minutes	105
Total Time Spent (minutes)	105 *

or

Time Spent in Hours	1
Time Spent in Minutes	45
Total Time Spent (minutes)	105 *

Tips

- When counseling a couple in the same appointment, use a BCF/BAS for each Medicare-eligible person. Divide the total time of the appointment between the participants, add the time you spent doing work on each person's behalf, and then enter the time on each person's form.
- If the same team member conducts multiple sessions in one day with the same client, add up the time spent in each session and enter the total time in the Time Spent field.
- Always review your entries before saving. Check that minutes and hours are entered in the correct fields.

ZIP CODE OF SESSION LOCATION

Zip Code of Session Location *

Purpose

This field captures where the SHIP team member was physically located during the counseling session. It ensures program credit is reported accurately for SHIP and MIPPA performance measures, regardless of whether counseling took place in person, by phone, or online.

What to Do

Enter the five-digit zip code of your location during the counseling session. STARS will automatically populate the state and county fields based on the zip code you enter. If you were counseling from your office or home, enter that location, not the beneficiary's. If STARS does not recognize a zip code, such as a P.O. Box, use the nearest standard zip code for the session location. Always review the auto-populated county, since some zip codes cross multiple counties or states, and correct it as needed.

Tips

- If the wrong county auto-populates, select the correct county from the dropdown.
- If you mistakenly enter the beneficiary's zip code instead of your own session location, correct it in the Session Location field; the beneficiary's residence has a separate field later in the form.
- If you try to use a P.O. Box zip code, replace it with the nearest standard geographic zip code. If the state and zip code do not match, STARS will not let you save until you correct the entry.

ZIP CODE OF BENEFICIARY RESIDENCE

Zip Code of Beneficiary Residence *

Purpose

This field records where the beneficiary lives. Beneficiary residence information is used in national performance measures to track rural and target populations served.

What to Do

Enter the zip code of the beneficiary's residence. STARS will automatically populate the state and county based on the zip code you enter. If the zip code crosses multiple counties, select the correct county from the dropdown list. If the beneficiary resides outside the United States, enter the same zip code you used for the session location.

Tips

- The beneficiary's residence may be in a different zip code than the session location, and that is okay.
- The zip code of beneficiary residence, session location, and the SHIP program may differ. Programs will still receive proper credit for their efforts on the Performance Measures Report.

SHIP TA and STARS Support

Account Lockouts and Login Issues

Booz Allen Hamilton (a.k.a. "Booz Allen") Help Desk

For difficulties with usernames, passwords, and account lockouts from failed attempts

📧boozallenstarshelpdesk@bah.com

📞703-377-4424

Programmatic Support & Resources

SHIP Technical Assistance Center (SHIP TA Center)

We provide support for data entry, STARS questions, and training

📧 stars@shiptacenter.org

📞 877-839-2675 (say "Center" when prompted)

🌐 www.shiphelp.org

Website Access Help

SHIP Technical Assistance Center (SHIP TA Center)

For help accessing password-protected STARS materials

📧 info@shiptacenter.org

📞 877-839-2675 (say "Center" when prompted)

SHIP Role or Account Changes

Contact your supervisor or SHIP director for

- New STARS accounts
- Role changes
- Reactivating inactive accounts

Note: Booz Allen and the SHIP TA Center cannot make these changes

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