Introduction

The SHIP Tracking and Reporting System (STARS) is the nationwide, web-based data system that facilitates reporting of SHIP activities. STARS allows all SHIP team members to enter SHIP activities into STARS. This job aid provides step-by-step instructions for entering beneficiary contacts into STARS. It is meant to be used in conjunction with the STARS User Basics job aid, which explains how to log in, retrieve passwords, and more.

STARS Landing Page: https://stars.entellitrak.com

We recommend you bookmark the STARS landing page for your convenience. You must have user credentials to successfully log into STARS.

Find Other Training Materials

The STARS home page contains links to all available STARS job aids, recorded webinars, and, when it’s available, the STARS manual, which will contain detailed program guidance from ACL (like the SHIP NPR manual).

Data Entry Steps

When entering data in STARS, you should move through the form by using the Tab key on your keyboard or by clicking through the fields using your mouse. If you press the Enter key, STARS will think you are trying to Save and will notify you of the yet-to-be completed fields. Also, STARS identifies fields where an entry is required (R) with a small red R.

Tracking Inbox

Upon login, look for Tracking Inbox in the main menu. All data entry actions are contained within the Tracking Inbox.

1. Select Beneficiary Contact.
2. The term “NEW” will appear. Click on “NEW.”
MIPPA and SMP

The first decision you must make is whether this contact is also related to your MIPPA work (if you are involved with the MIPPA program) and/or your SMP work (if you are involved with the SMP program). By default, STARS marks “No” for each of these choices. Click “Yes” if appropriate. Otherwise, do nothing.

MIPPA Note:
If you work with the MIPPA program, further instructions will be provided by the Center for Benefits Access at the National Council on Aging, the national Center for MIPPA grantees. STARS is both the SHIP data reporting system and the MIPPA data reporting system.

SIRS Note:
SIRS is the data system used by Senior Medicare Patrol (SMP) programs. SIRS and STARS are connected. If you are a SIRS user, you will now enter data in STARS and then send it to SIRS, with the exception of complex interactions. Beneficiary contacts that become complex interactions are finalized in SIRS.

Send to SMP: Upon login, STARS will recognize whether the STARS user is also a SIRS user. Below is an example with an auto-filled SIRS eFile ID. If you do SMP work and your SIRS eFile ID does not appear, contact your supervisor. If you are entering forms on behalf of another SIRS user you should enter that person’s valid SIRS eFile ID in this box to send the form to SIRS. Sending data to SIRS requires both a valid SIRS eFile ID and answering “Yes” to Send to SMP.

• (!) Important:
If saved data must be corrected or updated later, it must be edited in both systems (unless edits are related strictly to finalizing a complex interaction, in which case you only need to edit in SIRS). STARS beneficiary contact form updates do not transfer from STARS to SIRS; only the initial saved record transfers.

Reference Number
STARS will assign a STARS reference Number and, if appropriate, a SIRS Reference Number after you have saved the beneficiary contact form. At this stage of data entry, these fields will be blank. Later, the SHIP Reference Number will also be known as the SHIP Case Number on the Tracking Inbox.
Session Conducted By

Session Conducted By defaults to you. If you are entering a beneficiary contact made by another STARS team member, use the drop down list to select the appropriate team member.

Partner Organization Affiliation (not pictured) will automatically appear based upon the associated team member profile.

Session Location

There are three required fields dedicated to session location. These fields are used to capture the location where the counselor was located when the session was conducted. (The beneficiary’s location is captured later in the form.)

When you enter a Zip Code of Session Location, the County of Session Location auto-populates. The State of Session Location auto-populates also. In the example below, 22193 was entered as the zip code for a sample user in the state of Virginia. That zip code correlates to Prince William County.

Beneficiary Information

None of the beneficiary and representative contact information is required in STARS. Check with your supervisor about state and local SHIP program requirements for these fields.

Though you have already completed the session location fields using the zip code, the beneficiary residence may be in a different zip code. Beneficiary location fields behave in exactly the same way as the session location fields described earlier.
Contact Date and Method

These fields are all required.

- A date selector is provided to assist in entering the Date of Contact (R). You can also manually enter the date of contact; however, if you choose this method, months and days must be entered using 2-digits (i.e. 01 for January, and so on).

  ![Date of Contact](image)

- How Did Beneficiary Learn About SHIP (R). These drop down options are provided.

  ![How Did Beneficiary Learn About SHIP](image)

- Method of Contact (R). These drop down options are provided.

  ![Method of Contact](image)

Demographics

All of the demographic questions require an answer. Click the arrows to open drop down boxes for Age Group and Gender. Use the scroll bar to see all of the options for Race. For English as Primary Language, select Yes or No.

![Demographics](image)
Financial Information

Answers to the financial information questions in STARS are all required. On-screen income guidelines are provided for FPL (federal poverty limit) and LIS (Low-Income Subsidy).

- **Beneficiary Monthly Income** drop down options:

- **Beneficiary Assets** drop down options:

- **Receiving or Applying for Social Security Disability or Medicare Disability.** (Not pictured.) Answer Yes or No. You should only select “Yes” if the beneficiary is under the age of 65 and also receiving or applying for Social Security Disability or Medicare Disability. Medicare beneficiaries with End-Stage Renal Disease count. If your answer is not consistent with the age of the beneficiary in this contact, a prompt will appear and you will need to correct your entry.

Topics Discussed

At least one topic must be chosen as the topic discussed. The answer/s must be selected from one or more of the drop down lists provided. For the list associated with each topic, use the scroll bar to see all options. Topics and their list options are depicted below; however, the entire list of options for each topic requiring scrolling within the STARS system to see the options in their entirety.

- **Original Medicare (Parts A and B)**

- **Medigap and Medicare Select**

- **Medicare Advantage (MA and MAPD)**
Time Spent

Time spent can be entered in hours and/or minutes. Your entries in each field must be whole numbers. The time spent entered in the hours and minutes fields automatically calculates into total minutes in the required time spent field. In the example below, the beneficiary contact was 1 ½ hours, entered at 1 hour and 30 minutes in their respective fields. STARS calculated the time spent as 90 minutes.

**Note to users of STARS and SIRS (for SMPs):** Though STARS sends data to SIRS, the time spent cannot be divided between the SHIP and SMP content of the beneficiary contact. Enter the entire time spent in a given beneficiary contact into STARS. ACL accepts that the entire time spent on an interaction will be counted in both STARS and SIRS.
Status

Status is a required field. There are only two answer options – In Progress or Completed:

Special Use Fields

The Special Use Fields are not required in STARS. Only two are designated: Original PDP/MA-PD Cost and New PDP/MA-PD Cost. Talk with your supervisor about how the Special Use fields are being used in STARS for your SHIP program.

Notes and Uploaded Files

It is not required by STARS that you enter notes or upload files. Talk with your supervisor about whether and how the Notes and Attach Files fields are being used in your SHIP program. Uploading files into STARS works similarly to attaching a file to an email. Click Browse to select the file of choice from your computer. In the example below, a file has been uploaded in the first “Attach File” field. The path and file name appear in black.

STARS offers a Spell Check feature for use with the open-ended data fields. Click Spell Check and follow the on-line prompts. It works just like a typical spell checker in other software programs you are likely to be familiar with.
Save Your Work

When you press the blue Save button, either your beneficiary contact will be successfully saved, or you will be prompted to complete any required fields that you neglected.

Required Fields Prompts: Here is a list of the prompts that will appear for the required fields, if you neglect to provide answers for any of them:

- Zip Code of Session Location is business required.
- County of Session Location is business required.
- Zip Code ofBeneficiary Residence is business required.
- County of Beneficiary Residence is business required.
- How Did Beneficiary Learn About SHIP is business required.
- Method of Contact is business required.
- Beneficiary Age Group is business required.
- Beneficiary Gender is business required.
- Beneficiary Race is business required.
- English as a Primary Language is business required.
- Beneficiary Monthly Income is business required.
- Beneficiary Assets is business required.
- Receiving or Applying for Social Security Disability or Medicare Disability is business required.
- Total Time Spent (minutes) is business required.
- Status is business required.

Successful Save: A prompt indicating a successfully save contact briefly appears on your screen.

Even if you were looking down or away when the above prompt briefly appeared, you can know that your contact successfully saved if you see your contact on the screen with an absence of prompts like those above. Also, upon successful completion, STARS gives you the option to Print Full Data PDF. This will appear in the upper right corner.

Finally, successfully completed records appear in your Tracking Inbox.

- Click Tracking Inbox to see a list of your beneficiary contacts, including the one you just finished entering.
Additional Beneficiary Sessions

You can enter additional contacts for the same beneficiary by finding that beneficiary in the tracking inbox (circled in green) and selecting the beneficiary (click anywhere in their row). In this example, we will click SampleB.

Their record will appear. Hover your mouse over the Additional Beneficiary Sessions tab (circled in green), but don’t click yet.

You will see the option New SHIP Beneficiary Additional Sessions. Click on it.

A form auto-populated with the beneficiary’s contact information will appear. Complete the beneficiary contact fields according to the steps provided earlier in this job aid.

**Reminder: Session Conducted By:** From the drop down list, select who the session was conducted by (you or another team member, if applicable).

**Partner Organization Affiliation** will auto-populate accordingly.

Updating or Editing Previous Contacts

Beneficiary contacts can be updated and edited following the instructions provided in this job aid. All actions begin with the Tracking Inbox (as described in the section on Additional Beneficiary Sessions).

Reminder to SIRS Users: STARS beneficiary contact form updates do not transfer from STARS to SIRS; only the initial saved record transfers. If saved data must be corrected or updated later, it must be edited in both systems (unless edits are related strictly to finalizing a complex interaction, in which case you only need to edit in SIRS).
Appendix: Technical Assistance

Where you should go for individual technical assistance will vary, depending upon your issue or need. Here is a decision-making guide.

- **Your SHIP program leaders**: Data reporting processes vary by SHIP. For questions about how STARS is being managed by the SHIP in your area, contact your supervisor or leadership for your SHIP program.

- **Booz Allen Hamilton (a.k.a. “Booz Allen”)**: For technical assistance, such as for difficulties with usernames and passwords, contact the Booz Allen STARS help desk at boozallenstarshelpdesk@bah.com or 703-377-4424.

- **SHIP National Technical Assistance Center (SHIP TA Center)**: The SHIP TA Center provides webinar training, technical assistance, and written job aids on STARS.
  - Links to SHIP TA Center and ACL STARS resources are available to all STARS users on the STARS landing page
  - For questions about these steps or other STARS support resources, contact the SHIP TA Center, stars@shiptacenter.org or 877-839-2675.

- **Reminder: For online information about STARS**: Follow the links under “Need Help with STARS?” on the STARS landing page.