OFFICE of the INSURANCE COMMISSIONER WASHINGTON STATE
SHIBA

Volunteer training

Statewide Health Insurance Benefits Advisors (SHIBA)

Transitioning to STARS

- SHIP Tracking and Reporting System (STARS)
- July 1, 2018 launch date
- STARS training PowerPoint
- Desk aids
- SHIBA tip sheet
- Links to SHIP TA Center
- Beneficiary contact form (BCF)

June 2018

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Handouts included in this packet:

- **Beneficiary contact form**
- **User basics desk aid**
- **Beneficiary contact desk aid**

Volunteer learning objectives

After completing the June 2018 monthly training, volunteer advisors and volunteer coordinators will be able to:

- Demonstrate an understanding of the primary changes from SHIBA Online to STARS.
- Cite informational resources for STARS questions specific to entering data and requesting login assistance.
- Enter a Beneficiary Contact (client interaction) in STARS.

Troubleshooting and sharing time

Please take some time to share with your group the May training about "Working past age 65:"

- Review learning objectives
- Any content your group was unable to cover
- Questions that remain unanswered

Notes:

_____

_____

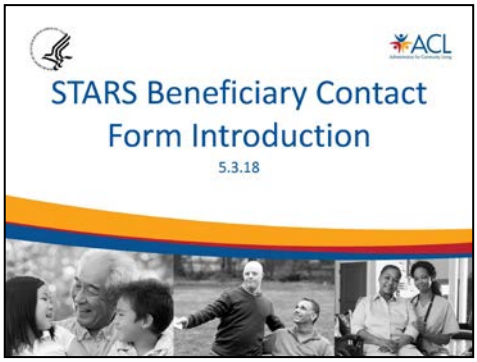
_____

_____

Acronyms for this training

ACL	Administration for Community Living www.acl.gov/
BAE	Best Available Evidence
BAH	Booz Allen Hamilton
BC	Beneficiary Contact
BCF	Beneficiary Contact Form
CCR	Client Contact Record
CMS	Centers for Medicare and Medicaid Services
DMEPOS	Durable medical equipment, prosthetics, orthotics and supplies
FPL	Federal Poverty Level
IT	Information technology
LI NET	Limited Income Newly Eligible Transition Program
LIS	Low Income Subsidy
MA	Medicare Advantage
MAPD	Medicare Advantage Part D
MIPPA	Medicare Improvements for Patients and Providers ACT www.ncoa.org/centerforbenefits/mippa/
NPR	National Performance Reporting www.shiptacenter.org/ship-operations/npr-and-stars/
OIC	Office of the Insurance Commissioner
OHIC	The Office of Healthcare Information and Counseling
PDP	Prescription Drug Plan
RTC	Regional Training Consultant
SHIP TA	State Health Insurance Assistance Programs Technical Assistance Center Resource Library www.shiptacenter.org/resource-library/
SIRS	SMP Information and Reporting System
SMP	Senior Medicare Patrol
SSA	Social Security Administration www.ssa.gov/
SSDI	Social Security Disability Insurance
STARS	SHIP Tracking and Reporting System
SUF	Special Use Fields
VA	Veterans Administration
VC	Volunteer Coordinator
VRPM	Volunteer Risk Program Management

STARS beneficiary contact form presentation



Webinar training
STARS PowerPoint training from May 3, 2018

SHIP TA STARS Resources (see the section in this packet on Resources: Electronic.

54 Slides original version
34 Slides SHIBA-edited version

See slides after the next page of slide notes.

Track your questions on the back page of this packet. Turn them in to your RTC and we'll follow-up on researching answers from SHIP TA.

General slide presentation notes

Slide #	Notes

Slide #	Notes

STARS Beneficiary Contact Form Introduction

Updated May 3, 2018

Agenda

- Slide 3: STARS Introduction and Access
- Slide 7: Sharing Data With MIPPA and SMP
- Slide 8: Beneficiary Contact Form
- Slide 31: SHIP Additional Beneficiary Sessions: Additional Contacts on the same Issue

STARS INTRODUCTION AND ACCESS

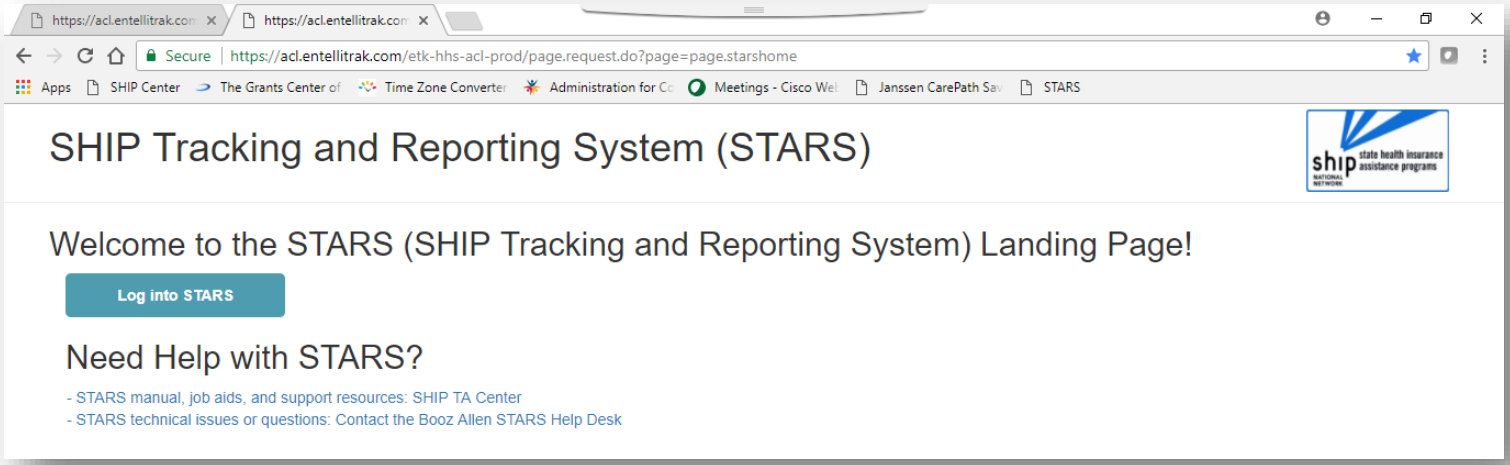
- SHIP Tracking And Reporting System (STARS)
- National, web-based data system
- Developed and owned by ACL OHIC
- Sharing Data
  - MIPPA
  - SMP SIRS

Gaining Access to STARS

- New Credentials (username and password)
  - Provided by state or local program managers before 'go live' date
  - Two auto-generated emails from Booz Allen Hamilton (BAH) DoNotReplyACLSystems@bah.com
    1. Username, and
    2. Password
- Role based system
  - Access will be determined by role, and
  - Location in system hierarchy

Logging into STARS

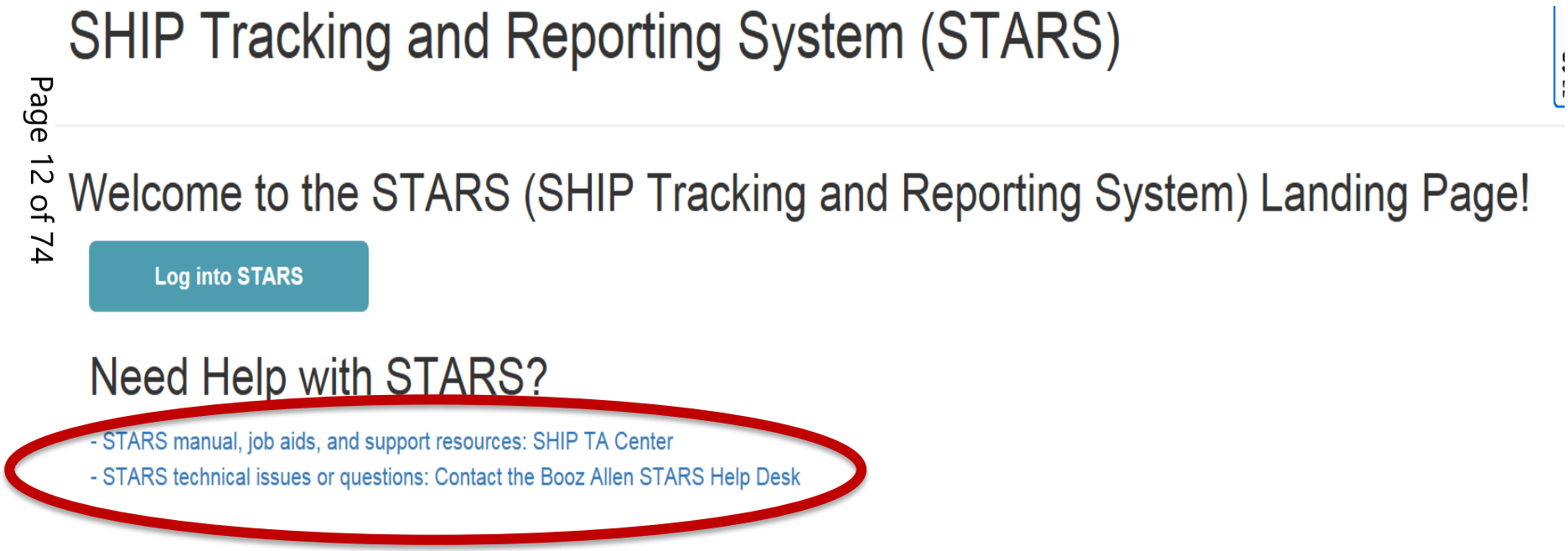
- https://stars.entellitrak.com



- NOTE: Username and Password are case sensitive

Training and support links

https://stars.entillitrak.com



SHARING DATA WITH MIPPA AND SMP

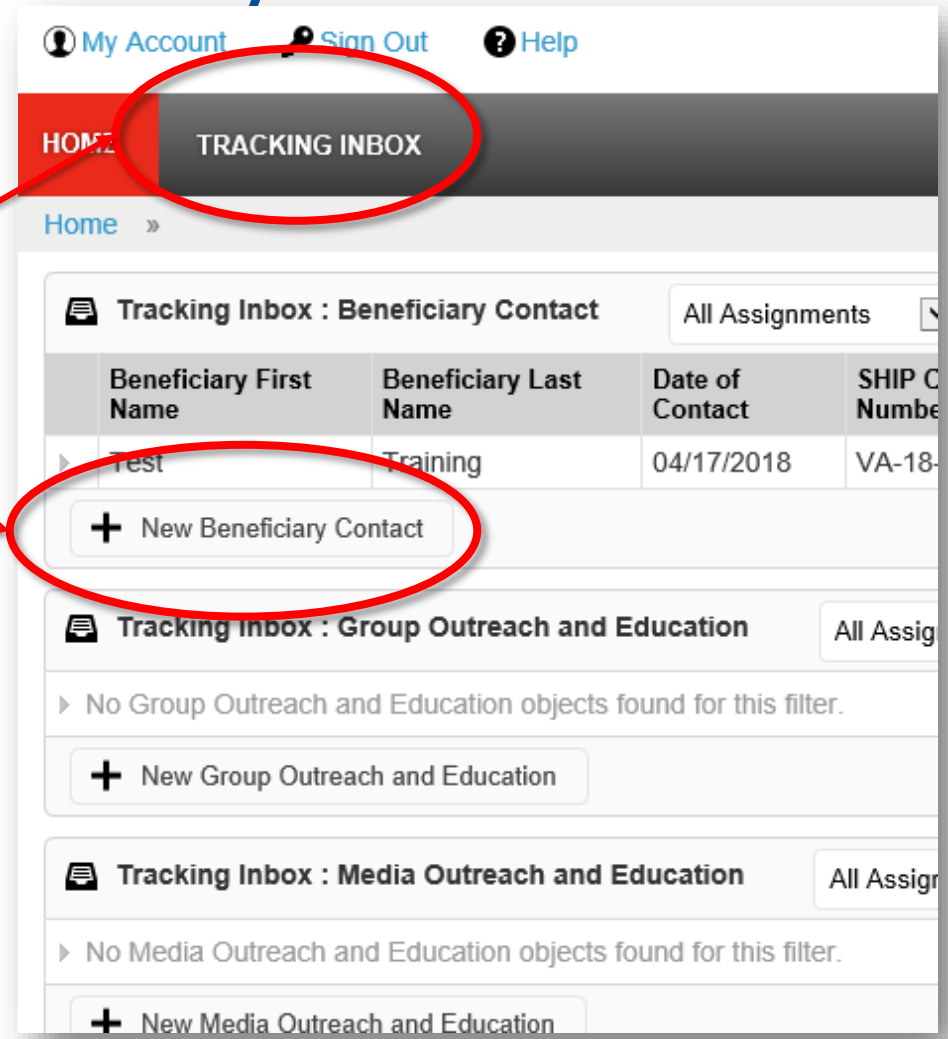
- Each of the three main forms (Beneficiary Contact, Group Outreach, and Media) have the ability to share data with MIPPA and/or SMP (Senior Medicare Patrol)
- SHIBA is developing a Job Aid to help our Washington state volunteers know how and when to use these features

BENEFICIARY CONTRACT FORM
Required Fields

- All Required Fields are designated with a red R located on the right hand side of the form next to the element
- System note at the top of the page lists incomplete fields to complete before saving

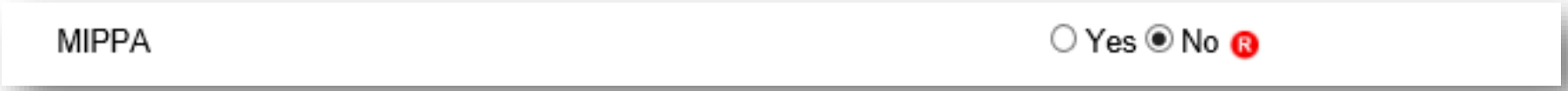
Adding a New Beneficiary Contact Form

- Two ways to add a new form:
  - From your Tracking Inbox, or
  - From the Home page



MIPPA

- MIPPA Field is required, but defaults to “No”
- Simply check the radio button for “Yes” at the top of the page, if this is a MIPPA contact
- Watch for SHIBA Job Aid on this topic



SMP (Senior Medicare Patrol) Reporting

Send to SMP ○ Yes ◉ No

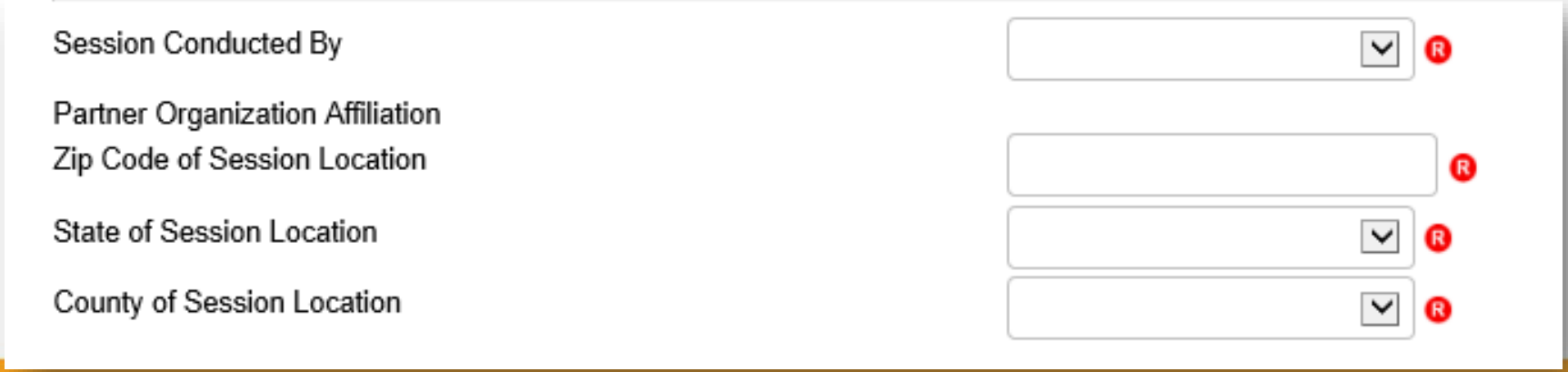
SIRS eFile ID

SIRS Reference Number

- SMP field is required, but defaults to “No”
- To send a form to SMP (SIRS) you will need to select “Send to SMP” at the top of the form
- Watch for SHIBA Job Aid on this topic

Session Conducted By

- This section of the form collects information on the person that counseled or worked with the beneficiary
- Use the drop down bars to select the correct options
  - Partner Organization will auto-populate
  - County will also auto-populate after you enter the Zip Code
  - Remember: Session location is where <u>you</u> are when counseling; not the beneficiary's residence



Beneficiary Information

- Space to collect both the Beneficiary's information and/or a Representative's information as needed
- None of these fields are required BUT please enter the name and phone number as often as possible
  - ACL needs the name and phone number to conduct our beneficiary satisfaction surveys

Beneficiary Residence Info

- This information is required

Date of Contact

- This information is required
- You can manually enter the date or
- Use the Date Picker tool by clicking on the calendar icon

How Did Beneficiary Learn About SHIP?

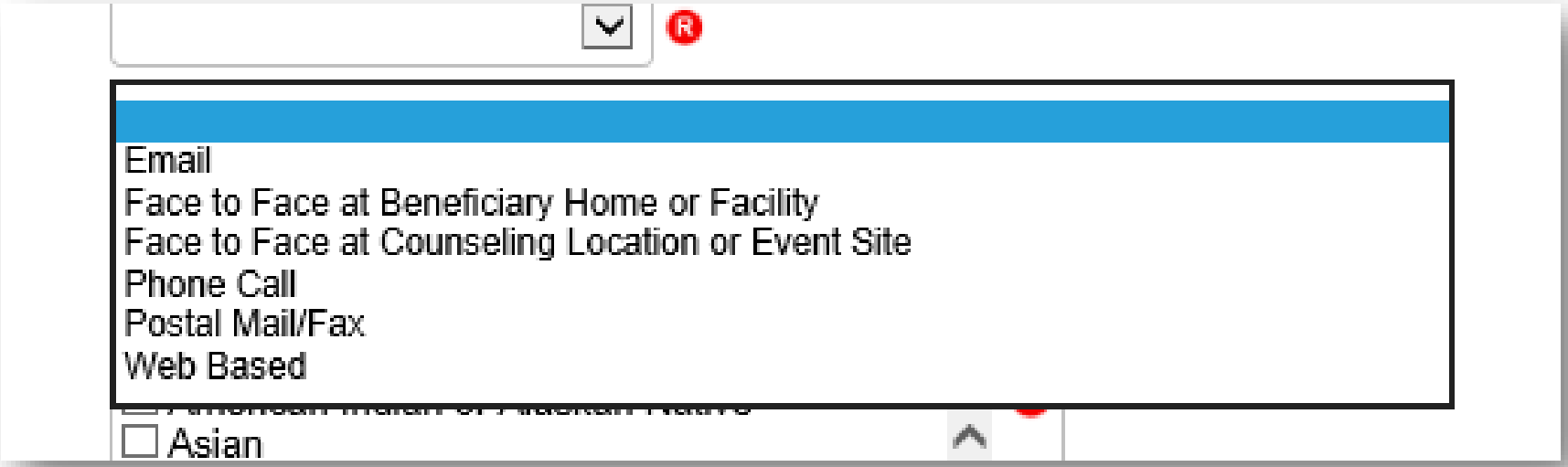
- Updated options include:
  - Congressional Office
  - Health/Drug Plan
  - SHIP TA Center
  - SSA
  - State Medicaid Agency

CMS Outreach
Congressional Office
Friend or Relative
Health/Drug Plan
Partner Agency
Previous Contact
SHIP Mailings
SHIP Media
SHIP Presentation
SHIP TA Center
SSA
State Medicaid Agency
State SHIP Website
1-800 Medicare
Other
Not Collected

- Pulled "1-800-Medicare" out of the "CMS Outreach" option so now they appear as separate selections independent of each other.
- Added "SHIP" as a qualifier in front of some of the selections to clarify that the selections are specific to SHIP activities/efforts. (i.e. "SHIP Mailings" and "SHIP Presentation")

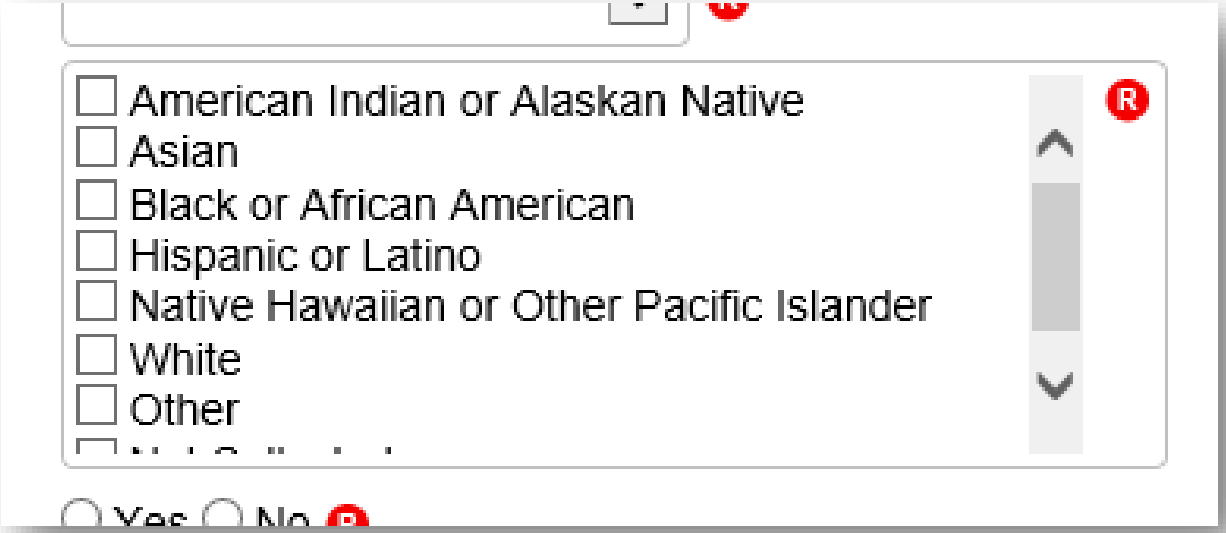
Method of Contact Changes

- The options under *Method of Contact* have changed slightly from NPR to include Web-based contacts
  - This option would be selected when using things such as website chat options to counsel a beneficiary



Beneficiary Demographics

- Age Group - Options have not changed from NPR
- Gender - Now includes “Other”
- Race - Consolidated choices to mirror other ACL system fields:



English as a Primary Language

- Select “No” when you know or can reasonably conclude that the beneficiary is not fluent in understanding, speaking, reading, and/or writing the English language.

Beneficiary Income & Assets

- Report beneficiary income and assets are above or below the maximum Extra Help/LIS eligibility levels (150% FPL)
- “Not collected” is an option

Receiving or Applying for SSDI?

- Select "Yes" to this question if:
  - Beneficiary is under age 65 **and**
  - Receiving *or* applying for Medicare and Social Security benefits due to disability or;
  - Receiving Medicare because of End-Stage Renal Disease

Receiving or Applying for Social Security Disability or Medicare Disability ○ Yes ○ No R

Topics Discussed

- Largest section of the Beneficiary Contact Form
- Select as many options as are necessary to fully explain beneficiary assistance
- Must select at least <u>one</u> topic discussed
- The following slides highlight changes from NPR but do not capture all of the Topics Discussed in STARS
- New manual coming soon that defines the fields

New Topics Discussed: Disenrollment

- New option under *Medicare Advantage* and *Medicare Part D*
  - To be used plan disenrollment at any time (not limited to the Open Enrollment Period)
  - Allows tracking of enrollments and disenrollments separately, lesson from Part D Enrollment Pilot

New Topics Discussed: Part D LIS

- Two new options found under *Part D Low Income Subsidy (LIS/Extra Help)*
  - Application Submission: Selected if assist with submission of an LIS application, either paper or electronically via SSA's website.
  - LI NET/BAE: Selected if assist accessing the limited Income Newly Eligible Transition Program (LI NET) benefit for those with an LIS award but no Part D coverage. Examples include:
    - providing LI NET education to pharmacy
    - submitting required documents for the Best Available Evidence (BAE) process if LIS award is not reflected in CMS/SSA systems

New Topics Discussed: Medicaid

- Expanded options under the *Medicaid* header to include:
  - Application Submission
  - Medicare Buy-In Coordination
  - Medicaid Managed Care
  - Recertification

New Topics Discussed: Other Insurance

- Several additional options have been added under *Other Insurance*:
  - Active Employer Health Benefits
  - Indian Health Services
  - Retiree Employer Health Benefits
  - Tricare For Life Health Benefits
  - Tricare Health Benefits
  - VA/Veterans Health Benefits

New Topics Discussed: Additional Topics

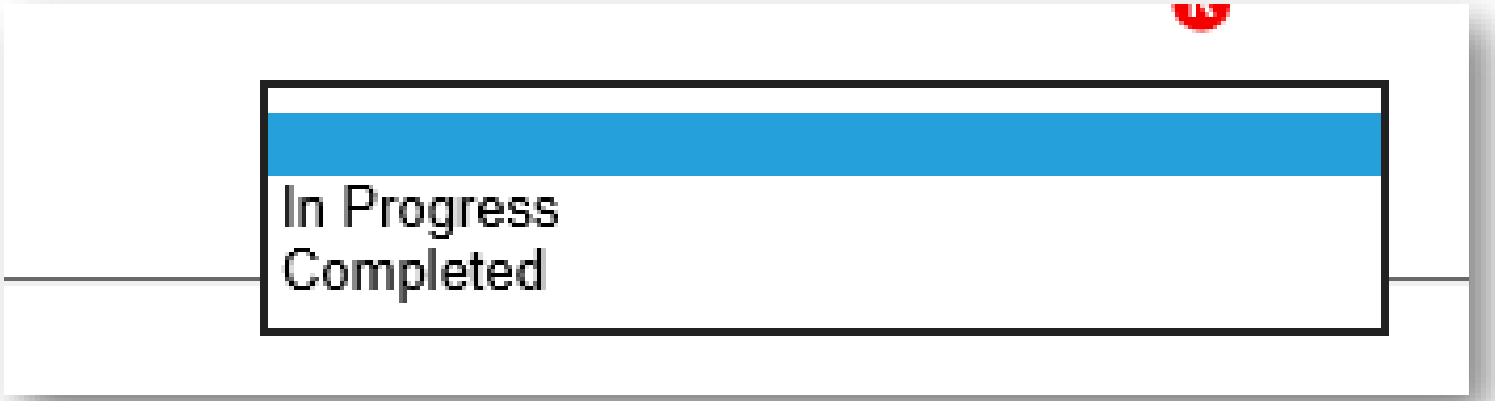
- A whole new category of topics has been added under the header *Additional Topic Details* which includes:
  - Ambulance
  - Dental/Vision/Hearing
  - DMEPOS
  - Duals Demonstration
  - Home Health Care
  - Hospice
  - Hospital
  - New Medicare Card
  - Preventive Benefits
  - Skilled Nursing Facility

Time Spent

- Enter all of the time you spent helping the beneficiary during this contact. Includes:
  - All time meeting with beneficiary
  - Any time spent researching, preparing materials, completing paperwork/form, and traveling to meet with the beneficiary.
- Enter time in whole hours and minutes
  - The system will total the time for you

Status

- STARS has only two status options:
  - In Progress – meant to reflect contact is part of an ongoing case
  - Completed – meant to reflect current issue is resolved
  - EITHER status can only be saved if all required fields filled, and will count toward performance measures- no need to go in and change “In Progress” to “Completed”



Special Use Fields

- STARS has 5 Special Use Fields
- Training will be provided later- they are not required fields

Special Use Fields

Original PDP/MA-PD Cost

New PDP/MA-PD Cost

Field 3

Field 4

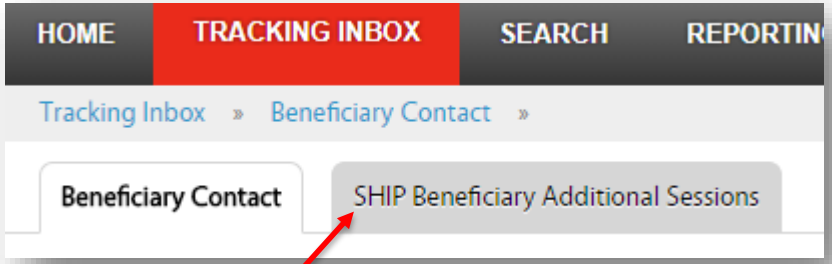
Field 5

Notes and File Attachments

- STARS allows you to both type in notes on the contact (similar to NPR) and
- Attach supporting documents (such as PDFs or Word documents)

SHIP ADDITIONAL BENEFICIARY SESSIONS
Additional Contacts on Same Issue

- STARS allows users to group together multiple contacts involving the same issue
- Click the *SHIP Additional Sessions* tab to add additional time and details
- Would be used only on complex issues that require multiple contacts to complete



Illustrating complexity

Entering Additional Contacts

- Provides space to enter the additional time spent and topics discussed
- Can add as many additional contact forms as needed
- Each additional contact counts the same way as a stand-alone contact on SHIP Performance Measures

Additional Contact Screenshot

Beneficiary Contact | **SHIP Beneficiary Additional Sessions**

Session Conducted By

Partner Organization Affiliation

Zip Code of Session Location

State of Session Location

County of Session Location

Date of Contact 04/16/2018 (mm/dd/yyyy)

Method of Contact

Topics Discussed

At least one Topic Discussed selection is required. Please choose a Topic before continuing.

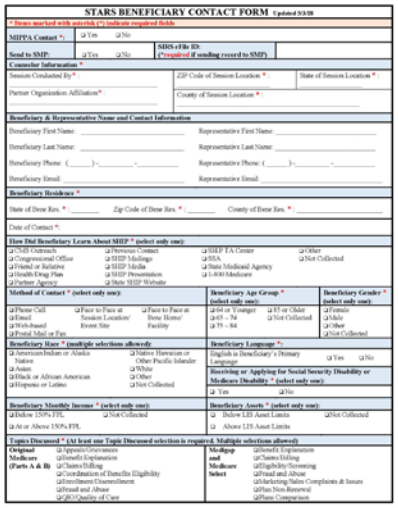
Original Medicare (Parts A & B)

- Appeals/Grievances
- Benefit Explanation
- Claims/Billing

QUESTIONS?

- We don’t know all the answers yet!
- Let’s make a list of the questions, so we can ask and get back to you.
- Thank you for your patience as we all learn together!

STARS beneficiary contact form



STARS BENEFICIARY CONTACT FORM Updated 5/3/18

* Items marked with asterisk (*) indicate required fields

MIPPA Contact *: ☐ Yes ☐ No

Send to SMP: ☐ Yes ☐ No

SHIS eFile ID: (*required if sending record to SMP)

Counselor Information *

Session Conducted By*: | ZIP Code of Session Location *: | State of Session Location *:

Partner Organization Affiliation*: | County of Session Location *:

Beneficiary & Representative Name and Contact Information

Beneficiary First Name: | Representative First Name:

Beneficiary Last Name: | Representative Last Name:

Beneficiary Phone: (_____)-_____-_____ | Representative Phone: (_____)-_____-_____

Beneficiary Email: | Representative Email:

Beneficiary Residence *

State of Dene Res. *: _____ Zip Code of Dene Res. *: _____ County of Dene Res. *: _____

Date of Contact *:

How Did Beneficiary Learn About SHIP * (select only one):

☐ CMS Outreach ☐ Previous Contact ☐ SHIP TA Center ☐ Other
☐ Congressional Office ☐ SHIP Mailings ☐ SSA ☐ Not Collected
☐ Friend or Relative ☐ SHIP Media ☐ State Medicaid Agency
☐ Health/Drug Plan ☐ SHIP Presentation ☐ 1-800 Medicare
☐ Partner Agency ☐ State SHIP Website

Method of Contact * (select only one):

☐ Phone Call ☐ Face to Face at Session Location/ Event Site ☐ Face to Face at Bene Home/ Facility
☐ Email
☐ Web-based
☐ Postal Mail or Fax

Beneficiary Age Group * (select only one):

☐ 64 or Younger ☐ 85 or Older
☐ 65 – 74 ☐ Not Collected
☐ 75 – 84

Beneficiary Gender * (select only one):

☐ Female
☐ Male
☐ Other
☐ Not Collected

Beneficiary Race * (multiple selections allowed):

☐ American Indian or Alaska Native ☐ Native Hawaiian or Other Pacific Islander
☐ Asian ☐ White
☐ Black or African American ☐ Other
☐ Hispanic or Latino ☐ Not Collected

Beneficiary Language *:

English is (Beneficiary's Primary Language ☐ Yes ☐ No

Receiving or Applying for Social Security Disability or Medicare Disability * (select only one):

☐ Yes ☐ No

Beneficiary Monthly Income * (select only one):

☐ Below 150% FPL ☐ Not Collected
☐ At or Above 150% FPL

Beneficiary Assets * (select only one):

☐ Below LIS Asset Limits ☐ Not Collected
☐ Above LIS Asset Limits

Topics Discussed * (At least one Topic Discussed selection is required. Multiple selections allowed)

Original Medicare (Parts A & B)
☐ Appeals/Grievances
☐ Benefit Explanation
☐ Claims/Billing
☐ Coordination of Benefits Eligibility
☐ Enrollment/Disenrollment
☐ Fraud and Abuse
☐ QIO/Quality of Care

Medigap and Medicare Select
☐ Benefit Explanation
☐ Claims/Billing
☐ Eligibility/Screening
☐ Fraud and Abuse
☐ Marketing/Sales Complaints & Issues
☐ Plan Non-Renewal
☐ Plans Comparison

Beneficiary Contact Form
2 pages

See form on next page

Source: www.shiptacenter.org/media/4042/4-30-18-bcf-form.docx

The fields on this form are the fields available in the online STARS data entry site.

MAKE NOTE of all required fields which are flagged in red.

Use the paper version of the form for a backup option if you can't login or if someone will enter the BCF information at a later time.

We will be reworking this form to make it easier to read.

Notes:

_____

_____

_____

_____

SHIBA STARS BENEFICIARY CONTACT FORM

*** Items marked with asterisk (*) indicate required fields**

MIPPA Contact*:		Send to SMP:		SIRS eFile ID: (*required if sending record to SMP):
❑ Yes	❑ No	❑ Yes	❑ No	

Counselor Information*

Session Conducted By*: _____

Partner Organization Affiliation*: _____

ZIP Code of Session Location*: _____

State of Session Location*: Washington

County - Session Location*: _____

Beneficiary & Representative Name and Contact Information

Beneficiary
First Name: _____
Last Name: _____
Phone: (_____) -_____ -_____
Email: _____

Representative
First Name: _____
Last Name: _____
Phone: (_____) -_____ -_____
Email: _____

Beneficiary Residence *

State * : _____ Zip Code * : _____ County *: _____

Date of Contact *:

How did Beneficiary Learn About SHIP* (select only one):

❑ CMS Outreach
❑ Congressional Office
❑ Friend or Relative
❑ Health/Drug Plan
❑ Partner Agency
❑ Previous Contact
❑ SHIP Mailings
❑ SHIP Media
❑ SHIP Presentation
❑ State SHIP Website
❑ SHIP TA Center
❑ SSA
❑ State Medicaid Agency
❑ 1-800-Medicare
❑ Other
❑ Not Collected

Method of Contact* (select only one):

❑ Phone Call
❑ Email
❑ Web-based
❑ US Mail or Fax
❑ Face to Face at Site/Event Site

Beneficiary Age Group* (select only one):

❑ 64 or less
❑ 65 – 74
❑ 75 – 84
❑ 85 +
❑ Not Collected

Beneficiary Gender* (select only one):

❑ Female
❑ Male
❑ Other
❑ Not Collected

Beneficiary Race* (multiple selections allowed):

❑ American Indian/Alaska Native
❑ Asian
❑ Black or African American
❑ Hispanic or Latino
❑ Native Hawaiian/Other Pacific Islander
❑ White
❑ Other
❑ Not Collected

Beneficiary Language*:

English is Beneficiary's Primary Language ❑ Yes ❑ No

Receiving or Applying for Social Security Disability or Medicare Disability* (select only one):

❑ Yes ❑ No

Beneficiary Monthly Income* (select only one):

❑ Below 150% FPL
❑ At or Above 150% FPL
❑ Not Collected

Beneficiary Assets* (select only one):

❑ Below LIS Asset Limits
❑ Above LIS Asset Limits
❑ Not Collected

Topics Discussed* (At least one Topic Discussed selection is required. Multiple selections allowed)

Original Medicare (Parts A & B)

❑ Appeals/Grievances
❑ Benefit Explanation
❑ Claims/Billing
❑ Coordination of Benefits Eligibility
❑ Enrollment/Disenrollment
❑ Fraud & Abuse
❑ QIO/Quality of Care

Medigap & Medicare Select

❑ Benefit Explanation
❑ Claims/Billing
❑ Eligibility/Screening Fraud & Abuse
❑ Marketing/Sales Complaints & Issues
❑ Plan Non-Renewal
❑ Plans Comparison

Topics Discussed (multiple selections allowed) (continued from p.1)*

Medicare Advantage (MA and MA-PD)

- ❑ Appeals/Grievances
- ❑ Benefit Explanation
- ❑ Claims/Billing
- ❑ Disenrollment
- ❑ Eligibility/Screening
- ❑ Enrollment
- ❑ Fraud and Abuse
- ❑ Marketing/Sales Complaints & Issues
- ❑ Plan Non-Renewal
- ❑ Plans Comparison
- ❑ QIO/Quality of Care

Medicare Part D

- ❑ Appeals/Grievances
- ❑ Benefit Explanation
- ❑ Claims/Billing
- ❑ Disenrollment
- ❑ Eligibility/Screening
- ❑ Enrollment
- ❑ Fraud and Abuse
- ❑ Marketing/Sales Complaints & Issues
- ❑ Plan Non-Renewal
- ❑ Plans Comparison

Part D Low Income Subsidy (LIS/Extra Help)

- ❑ Appeals/Grievances
- ❑ Application Assistance
- ❑ Application Submission
- ❑ Benefit Explanation
- ❑ Claims/Billing
- ❑ Eligibility/Screening
- ❑ LI NET/BAE

Other Prescription Assistance

- ❑ Manufacturer Programs
- ❑ Military Drug Benefits
- ❑ State Pharmaceutical Assistance Programs
- ❑ Union/Employer Plan
- ❑ Other

Medicaid

- ❑ Application Submission
- ❑ Benefit Explanation
- ❑ Claims/Billing
- ❑ Eligibility/Screening
- ❑ Fraud and Abuse
- ❑ Medicaid Application Assistance
- ❑ Medicare Buy-in Coordination
- ❑ Medicaid Managed Care
- ❑ MSP Application Assistance
- ❑ Recertification
- ❑ Other

Other Insurance

- ❑ Active Employer Health Benefits
- ❑ COBRA
- ❑ Indian Health Services
- ❑ Long Term Care (LTC) Insurance
- ❑ LTC Partnership
- ❑ Other Health Insurance
- ❑ Retiree Employer Health Benefits
- ❑ Tricare For Life Health Benefits
- ❑ Tricare Health Benefits
- ❑ VA/Veterans Health Benefits
- ❑ Other

Additional Topic Details

- ❑ Ambulance
- ❑ Dental/Vision/Hearing
- ❑ DMEPOS
- ❑ Duals Demonstration
- ❑ Home Health Care
- ❑ Hospice
- ❑ Hospital
- ❑ New Medicare Card
- ❑ New to Medicare
- ❑ Preventive Benefits
- ❑ Skilled Nursing Facility

Total Time Spent on This Contact *	**Status** *	
_____ Hours _____ Minutes	❑ In Progress	❑ Completed

Special Use Fields

Original PDP/MA-PD Cost: _____

New PDP/MA-PD Cost: _____

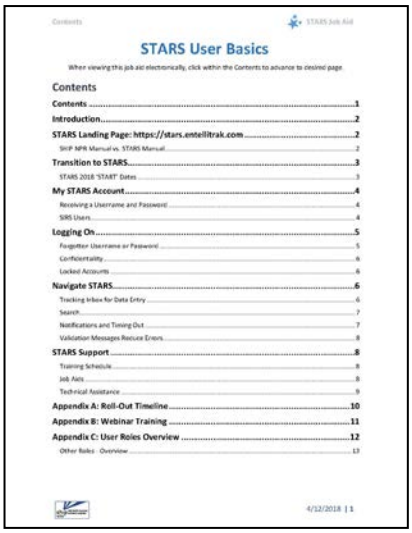
Field 3: _____

Field 4: _____

Field 5: _____

Notes

STARS beneficiary contact desk aid: User basics



STARS User Basics

When viewing this job aid electronically, click within the Contents to advance to desired page.

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STARS Users Basics
8 pages

See desk aid on next page.

Links on the document will only work from the SHIP TA Center website.

Source: www.shiptacenter.org/media/3965/stars-user-basics-job-aid-updated-41218.pdf

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STARS Submitter User Basics

When viewing this job aid electronically, click within the Contents to advance to desired page.

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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 data into STARS. Between March 22, 2018 and 10/1/2018, SHIPs are transitioning gradually by group from the SHIP NPR data reporting system to STARS.

STARS was developed and is owned by the U.S. Administration for Community Living (ACL). The Office of Healthcare Information and Counseling (OHIC) oversees and manages the SHIP program nationally.

This job aid, created by the SHIP National Technical Assistance Center (SHIP TA Center), is intended for all STARS Users, regardless of role. It is a reference guide to understanding:

1. The transition from SHIP NPR to STARS
2. How to login to STARS
3. How to navigate STARS
4. Where to go for help

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 Training Materials

The STARS home page contains links to STARS job aids, and, when it's available, the STARS manual.

SHIP NPR Manual vs. STARS Manual

The SHIP NPR manual contains the program guidance for interpreting and entering SHIP activities into the national SHIP data reporting system. The definitions of terms, the SHIP performance measures, and the requirements about what types of activities are reportable is not changing. ACL is updating the STARS manual based upon the former SHIP NPR manual. It will not be fully updated until mid-spring 2018. Meanwhile, users should rely on the SHIP NPR manual for guidance about definitions, terms, and reportable activities. Users should rely on

STARS job aids and STARS training webinars for data entry instructions. SHIP leaders at the state, regional, and local levels may also be providing STARS training. Check with your supervisor for details about state, regional, and local STARS training and/or requirements.

Transition to STARS

STARS is replacing SHIP NPR as the SHIP data reporting system gradually from March through October 2018.

STARS 2018 'START' Dates

On and after your STARS 'start' date, your SHIP data must be entered exclusively into STARS. On your STARS 'start' date, SHIP NPR will not accept any new data. Existing SHIP NPR data will be in a "read only" status until 11/30/2018. Then, SHIP NPR will be shut down entirely. Here is an at-a-glance reference to data entry start dates, based on the roll-out timeline provided by ACL.

STARS Exclusive (i.e.'Start') Dates by SHIP Group

Group 1: 5/1/2018

- CT, DC, GU, NC, RI, UT

Group 2: 6/1/2018

- CO, IN, MA, MS, NE, NV, OK

Group 3: 7/1/2018

- IL, KS, MD, OR, PR, TX, VA, VI, WY

Group 4: 8/1/2018

- AK, AR, DE, FL, KY, ME, MO, ND, NJ, NM

Group 5: 9/1/2018

- AZ, HI, LA, NY, OH, PA, SD, TN, WI, WV

Group 6: 10/1/2018

- AL, CA, GA, IA, ID, MI, MN, MT, NH, SC, VT, WA

My STARS Account

To access STARS, a user must have an account, referred to as your "credentials." Credentials are generated when a user's "team member" account is created by their SHIP. Credentials consist of the following, both of which are case sensitive:

1. Username
2. Password

In 2018, your SHIP must also be within or beyond your 6 week launch phase, which is determined by your assigned group on the STARS Roll-Out Timeline (Appendix A).

Receiving a Username and Password

After a new SHIP Team Member is created in STARS, that team member will be emailed their "credentials" (username and password). This information will arrive from STARS in two separate auto-generated emails to the email address that was entered on the team member form.

- The sending address will be ***DoNotReplyACLSystems@bah.com*.**
- If you do not receive these emails, contact the Booz Allen STARS help desk. They provide all STARS username and password support.

STARS users whose role is to simply enter beneficiary contacts and/or outreach activities will be sent their credentials on or after their SHIP group start date. During the 2018 launch cycle, users whose role is to create STARS Team Members may access the STARS system as soon as they receive their user name and password. Team member creation is the only kind of data entry allowed in advance of the STARS start date for your group.

SIRS Users

SIRS is the data system used by Senior Medicare Patrol (SMP) programs. If you are a SIRS user, you will now enter most data directly into STARS, and then send it to SIRS, with the exception of complex interactions. They must be entered directly into SIRS. STARS users and SIRS users have separate user accounts, requiring two sets of log-in credentials. STARS users with a SIRS eFile ID need only click a "Send to SMP" button, and data will automatically transfer.

(!) Send to SMP NOTES:

Upon login, STARS will recognize whether the STARS team members is also a SIRS user. This depends on accurate team member data entry, however. See the example auto-filled SIRS eFile ID below. Sending data to SIRS is as easy as clicking a button ("Yes"):

- SIRS data does not and cannot transfer to STARS; the directional flow is from STARS to SIRS only:

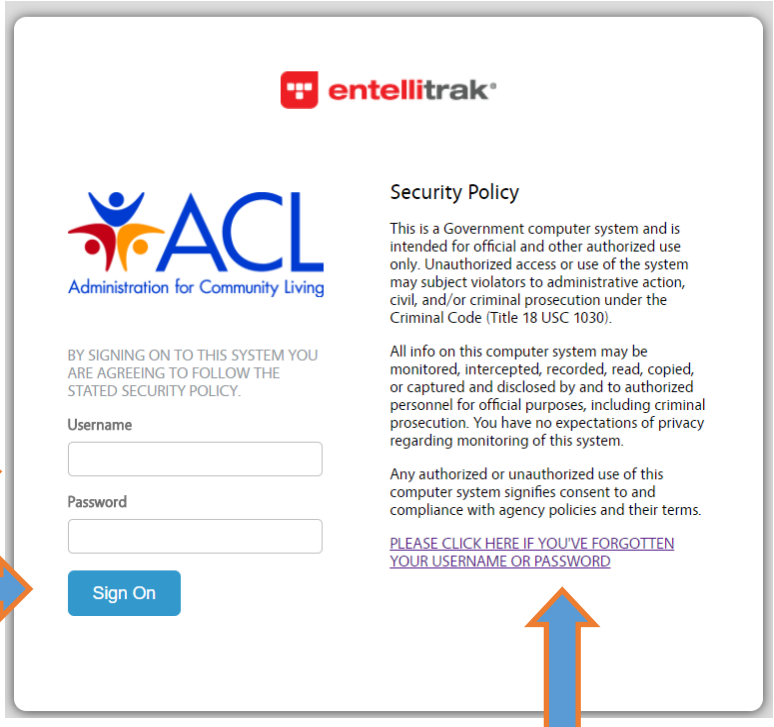
- Time spent cannot be divided between the SHIP and SMP content. ACL accepts that the entire time spent on an interaction will be counted in both STARS and SIRS.
- If saved data must be corrected or updated later, it must be edited in both systems. Edits do not transfer from STARS to SIRS.
- SIRS is supported by the SMP National Resource Center (www.smpresource.org). For help using SIRS, contact Sara Lauer, SMP Resource Center; slauer@smpresource.org; 319-874-6859; SIRS@smpresource.org.

Logging On

We recommend that you bookmark the STARS website: https://stars.entellitrak.com. It is also linked on the SHIP TA Center's website, www.shiptacenter.org.

The login page looks like this:

1. Enter your Username and Password (both are case sensitive)
2. Click Sign On



Forgotten Username or Password

If you forget your STARS username or password, click the link on the STARS login screen that says, "Please click here if you've forgotten your username or password." Follow the prompts to reset your password or to receive an email containing your username. If you do not receive an email, call the Booz Allen STARS helpdesk (see STARS Support).

- **(!) Attention users of both SIRS and STARS:** You will not be able to use the link on the login page to retrieve your username or password (assuming you use the same email address in both systems). If you forget your username or password, you must call the Booz Allen STARS helpdesk (see STARS Support).

Confidentiality

To ensure data integrity, usernames and passwords should not be shared with anyone.

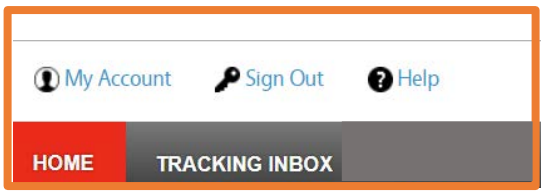
Locked Accounts

After the STARS roll-out process is complete (autumn 2018), user accounts will automatically be locked after 120 days of inactivity. Starting immediately, however, user accounts become locked after three unsuccessful login attempts. The Booz Allen Help Desk will be responsible for unlocking user accounts upon request.

Navigate STARS

The STARS Home page contains the main menu. For the purposes of this job aid, we will focus on the features outlined here in orange, which all STARS Submitters have.

The terms in blue link to basic system user tools.

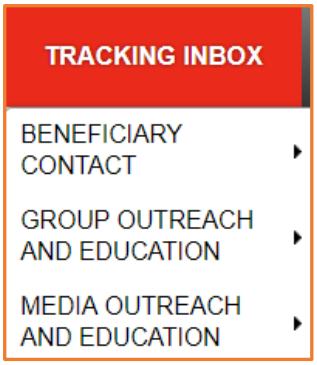


- **My Account:** Use this feature to change your review your profile, change your password, and edit your preferences.
- **Sign Out:** To preserve system bandwidth, please remember to sign out of STARS. If you don't sign out, the system will automatically log you out after 30 minutes.
- **Help:** General system help is available here, but it may not be specific to the STARS version of entellitrak software. Refer to the STARS job aids and manual for SHIP and STARS specific guidance.

Tracking Inbox for Data Entry

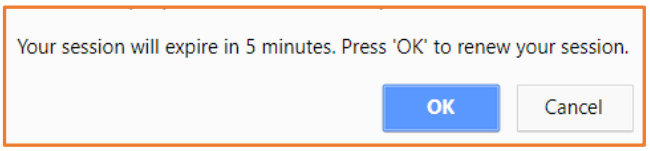
All data entry actions are contained within the Tracking Inbox. The terms should be self-explanatory. Refer to other job aids for detailed data entry instructions for each type of SHIP activity. To open a data entry form:

1. Click on the desired activity
2. The term "NEW" will appear
3. Click on "NEW"

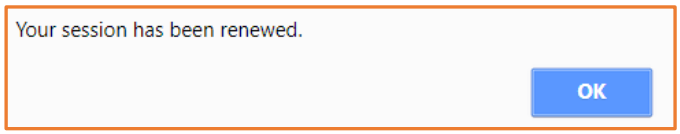


Notifications and Timing Out

After 25 minutes of inactivity on your screen, STARS will display the following message:



Click OK. The following message will appear:



Click OK to resume data entry. If you miss these opportunities, you will be logged out.

Validation Messages Reduce Errors

To ensure that data entered into the STARS is accurate, information entered must meet specific validation criteria for each field. A user will receive a variety of validation messages for insufficient data, depending on the field type. There are too many such messages to display here, but here are some examples:

- When counting people or number of media events, the user cannot enter less than whole numbers.
- If a user enters illogical information or if required fields are left blank, the form will not meet STARS validation criteria, and the user will be prompted. After the validation criteria has been met, the form will be allowed to save.

STARS Support

STARS is supported nationally by a team of people at ACL, the SHIP National Technical Assistance Center, and STARS developers at Booz Allen Hamilton.

Training Schedule

A robust training schedule has been developed for the 2018 STARS roll-out. Appendix B displays the webinar training topics intended for all roles and the cycle of repetitions for the March through October timeframe. A key theme is that representatives from the group preparing for their STARS start date and groups who are past their start date can also attend (for refresher training).

Appendix A contains the roll-out schedule, which determines when SHIP users will be invited to training. Training invitations are provided to SHIP directors and administrators, who will then distribute them as needed to other applicable SHIP personnel.

Job Aids

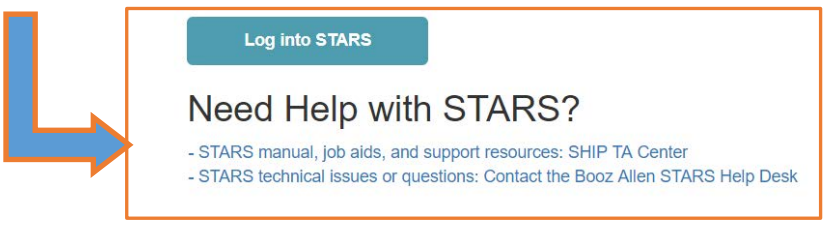
Here is the list of planned job aids relevant to the STARS Submitter role, the intended audience, and their publication date.

- STARS Submitter User Basics (April 2018): For team members with the STARS Submitter role
- Beneficiary Contact Form (April 2018): For all users
- Group Outreach and Education (April 2018): for all users
- Media Outreach and Education (April 2018): for all users

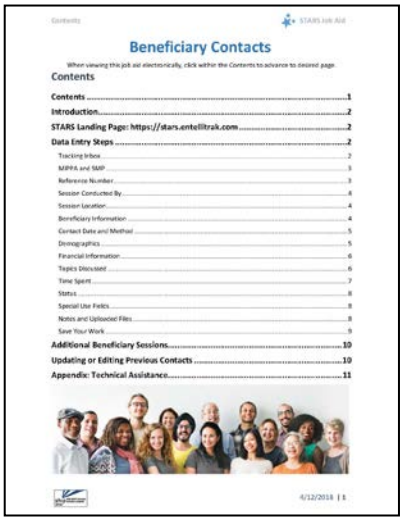
Technical Assistance

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
    - Reminder: During the STARS launch (March – October 2018), all live webinars are announced only to SHIP leaders, who must forward registration information to their other team members. Webinars are recorded and the recordings are available to anyone with the STARS landing page link.
    - For questions about these steps or other STARS support resources, contact the SHIP TA Center, stars@shiptacenter.org, 877-839-2675, www.shiptacenter.org.
- **Reminder: For online information about STARS**: Follow the links under "Need Help with STARS?" on the STARS landing page: https://stars.entellitrak.com.



STARS beneficiary contact desk aid: Beneficiary contacts



Beneficiary Contacts
11 pages

See desk aid on next page.

Links on the document will only work from the SHIP TA Center website.

Source: www.shiptacenter.org/media/3968/stars-beneficiary-contact-job-aid-41218.pdf

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Beneficiary Contacts

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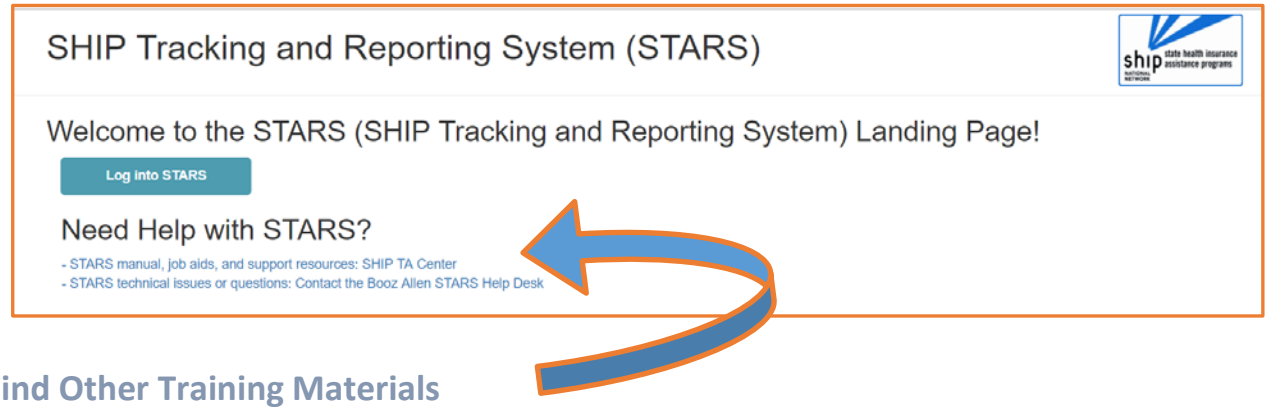
Introduction

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."

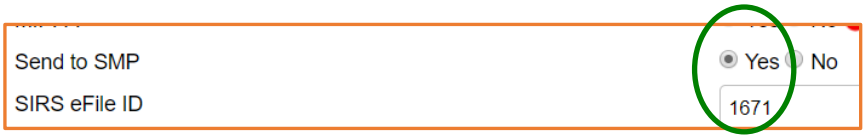
MIPPA and SMP

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.

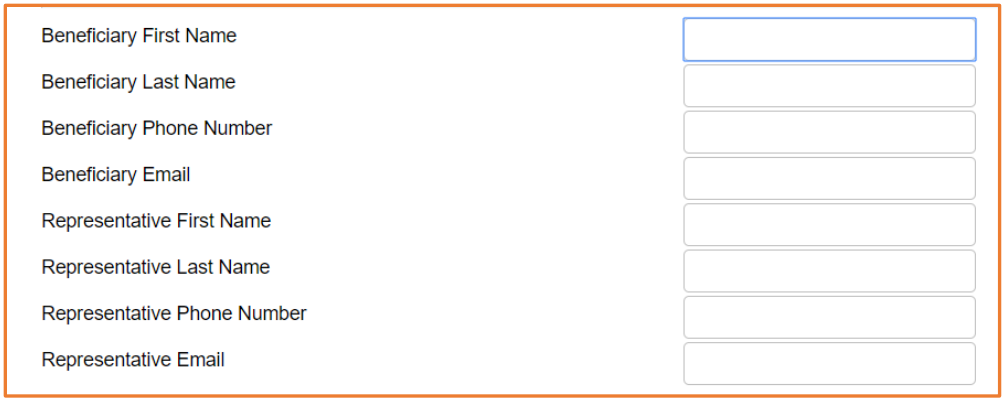
Session Location

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.



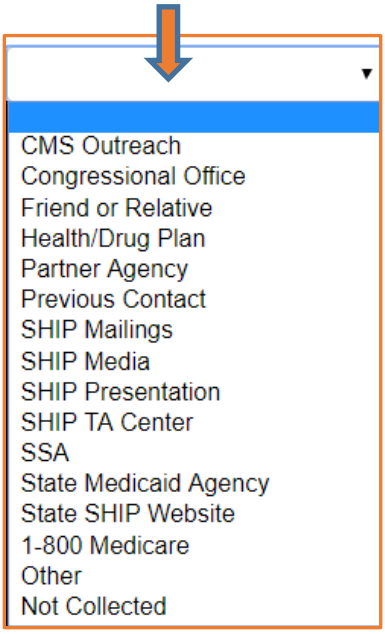
Though you have already completed the session location fields using the zip code, the beneficiary residence may be in a different zip code. Beneficiary location fields behave in exactly the same way as the session location fields described earlier.

Contact Date and Method

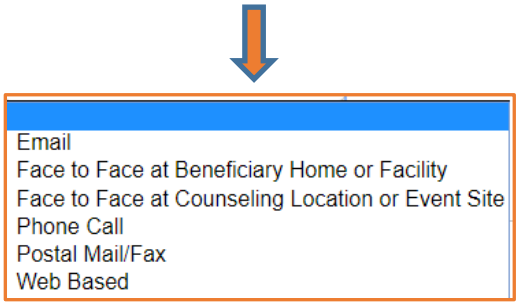
These fields are all required.

- 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).

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

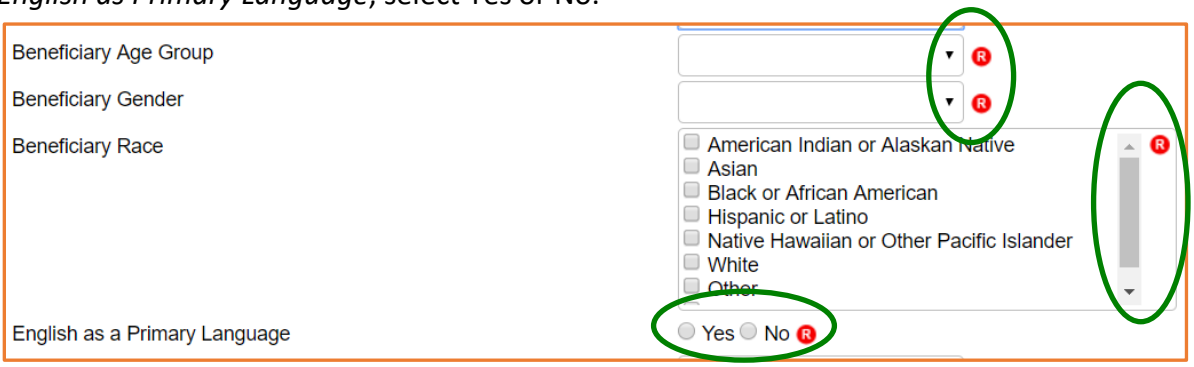


- *Method of Contact (R).* These drop down options are provided.



Demographics

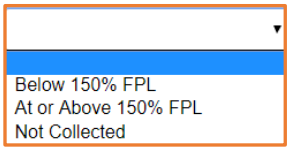
All of the demographic questions require an answer. Click the arrows to open drop down boxes for *Age Group* and *Gender*. Use the scroll bar to see all of the options for *Race*. For *English as Primary Language*, select Yes or No.



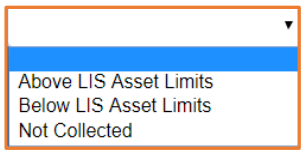
Financial Information

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).

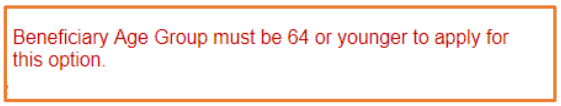
- *Beneficiary Monthly Income* drop down options:



- *Beneficiary Assets* drop down options:



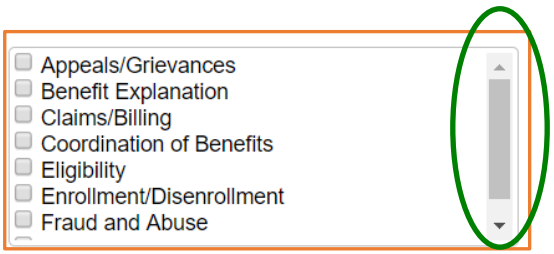
- *Receiving or Applying for Social Security Disability or Medicare Disability.* (Not pictured.) Answer Yes or No. You should only select "Yes" if the beneficiary is under the age of 65 and also receiving or applying for Social Security Disability or Medicare Disability. Medicare beneficiaries with End-Stage 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.



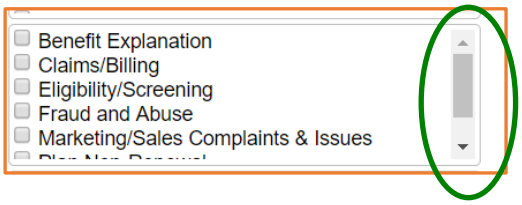
Topics Discussed

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.

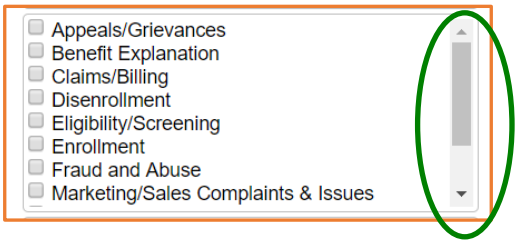
- *Original Medicare (Parts A and B)*



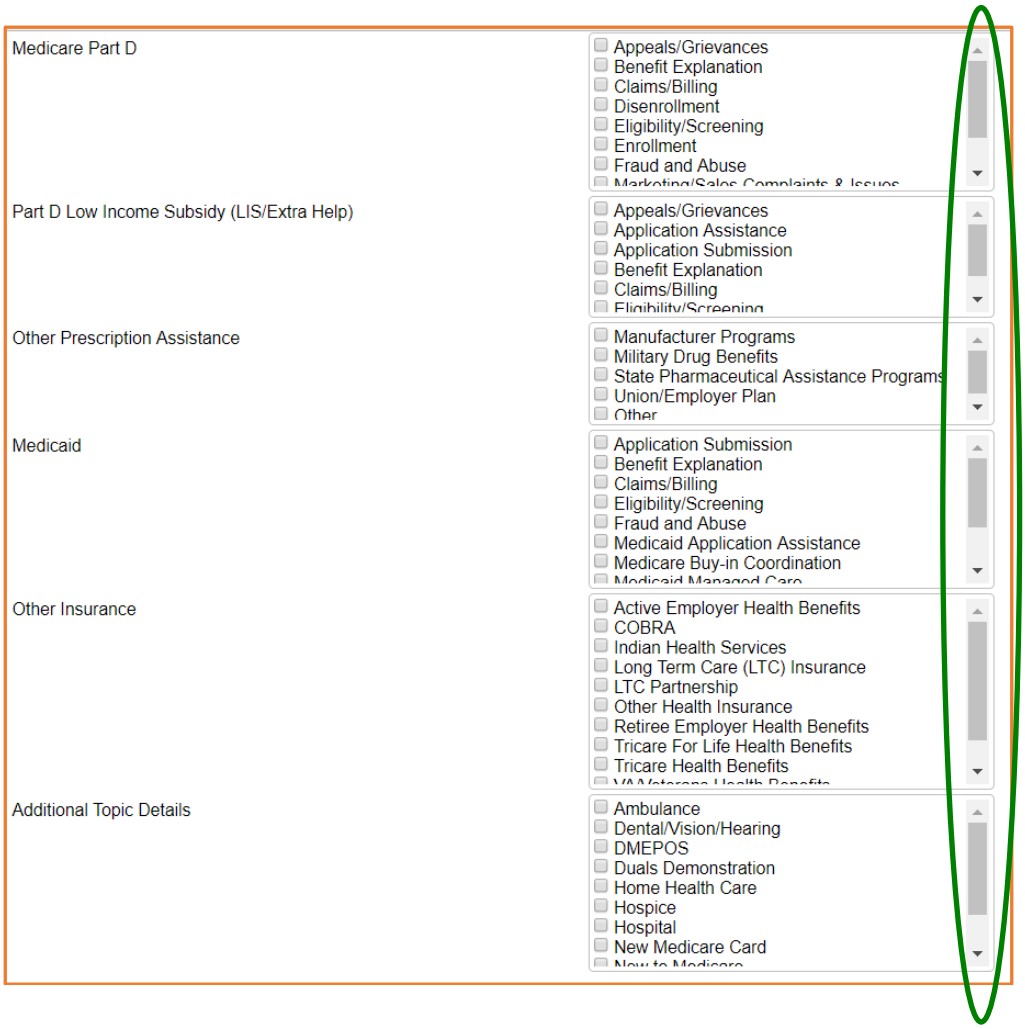
- *Medigap and Medicare Select*



- *Medicare Advantage (MA and MAPD)*



- [Continued] *Medicare Part D; Part D Low Income Subsidy (LIS/Extra Help); Other Prescription Insurance Assistance; Medicaid; Other Insurance; Additional Topics:*



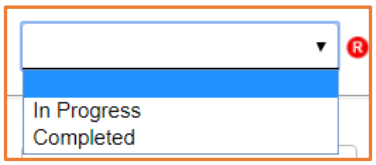
Time Spent

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:

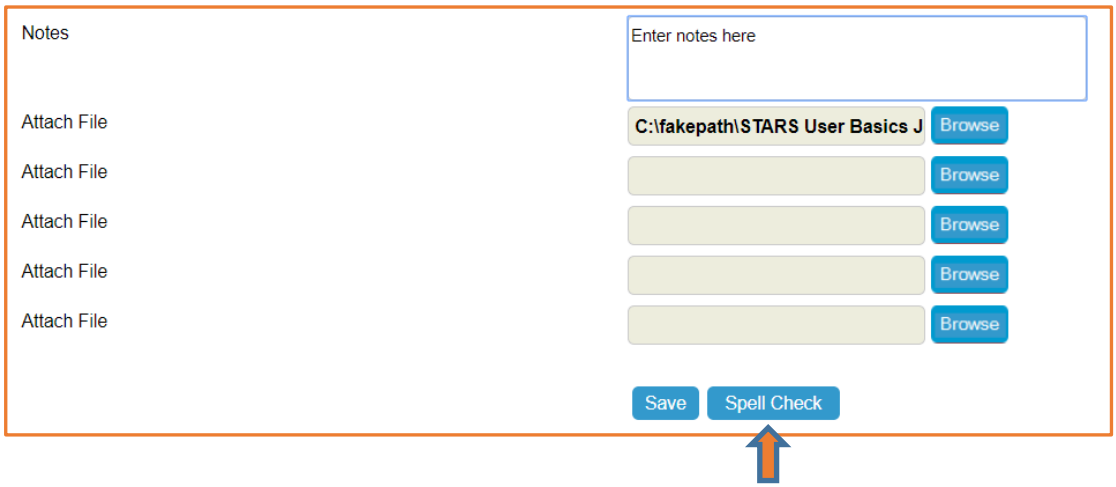


Special Use Fields

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.



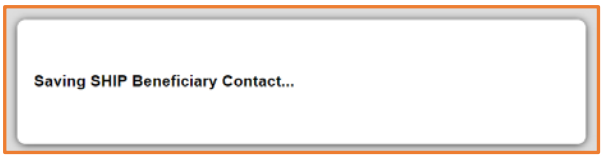
STARS offers a Spell Check feature for use with the open-ended data fields. Click Spell Check and follow the on-line prompts. It works just like a typical spell checker in other software programs you are likely to be familiar with.

Save Your Work

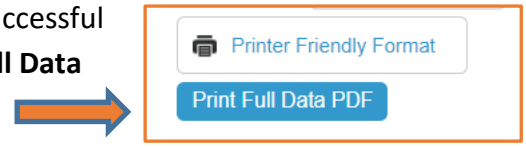
When you press the blue Save button, either your beneficiary contact will be successfully saved, or you will be prompted to complete any required fields that you neglected.

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:

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

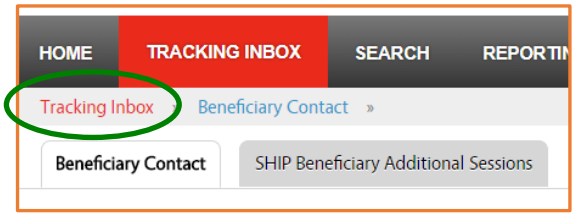


Even if you were looking down or away when the above prompt briefly appeared, you can know that your contact successfully saved if you see your contact on the screen with an absence of prompts like those above. Also, upon successful completion, STARS gives you the option to **Print Full Data PDF**. This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



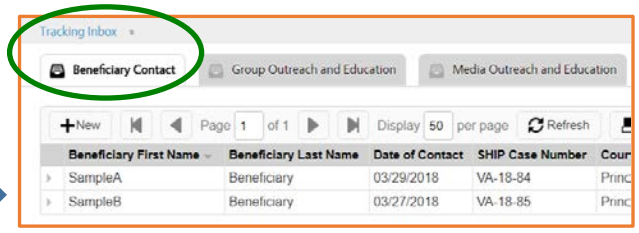
Finally, successfully completed records appear in your Tracking Inbox.

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

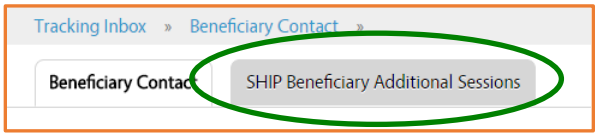


Additional Beneficiary Sessions

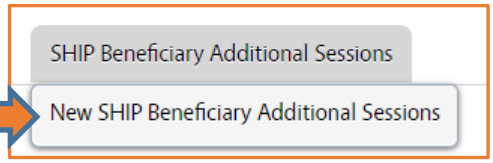
You can enter additional contacts for the same beneficiary by finding that beneficiary in the tracking inbox (circled in green) and selecting the benefiary (click anywhere in their row). In this example, we will click SampleB.



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



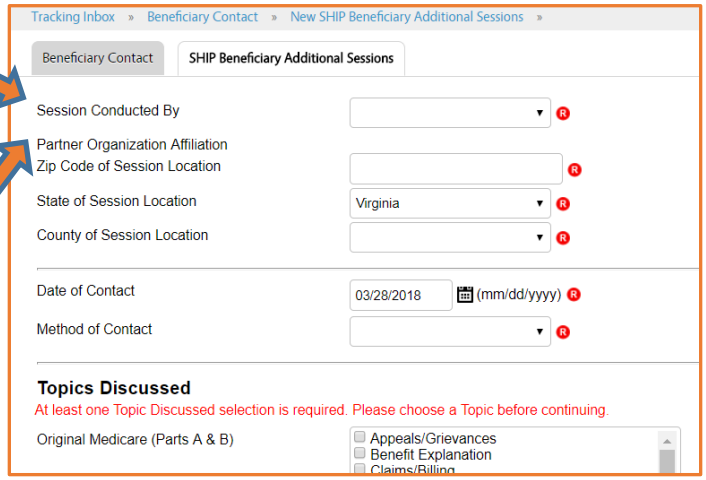
You will see the option *New SHIP Beneficiary Additional Sessions.* Click on it.



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

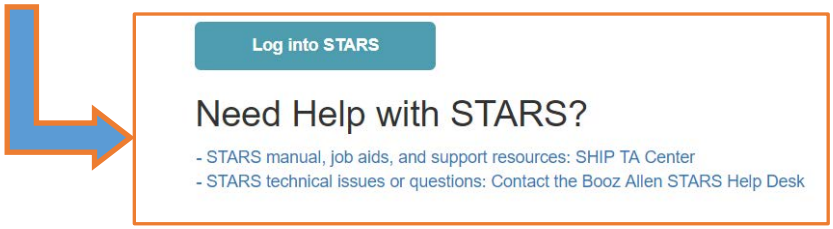
Where you should go for individual technical assistance will vary, depending upon your issue or need. Here is a decision-making guide.

- **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.



The production of this job aid was supported by Grant Number 90SATC0001 from the Administration for Community Living (ACL). Though its contents were developed in cooperation with ACL, this document is solely the responsibility of the SHIP National Technical Assistance Center.

STARS tips and comparisons

Getting on board with STARS will be a learning process. Some processes will be easier than others. Here are some tips to help as you navigate this new data system.

Tips and hints while using STARS

1. It is possible to search for a client.
2. Remember to save.
3. You can upload any type of file. You'll typically upload Word, PDF or image files.
4. See the STARS manual for an explanation of each database field and examples of content you might encounter.
5. Passwords expire: This feature is disabled for now, but will change down the road and you'll need to set a new password every 90 days.
6. You should address any problems with your password to Booz Allen at BoozAllenSTARSHelpDesk@bah.com.
7. You'll still have access to SHIBA Online to reference past content.
8. STARS will automatically time out after 25 minutes of inactivity.
9. It's a good idea to bookmark the STARS landing web page or save it as a favorite: stars.entellitrak.com.
10. You should enter 1.5 hours as either:
    a. 1 hour and 30 minutes or
    b. 90 minutes
11. Currently, you can only attach a maximum of five documents to a Beneficiary Contact.

Reminder: A beneficiary contact includes **all contacts** for the purpose of relaying Medicare and SHIP-related information between a counselor or staff and a client. Contacts may occur with Medicare beneficiaries, family members, caregivers or others working on behalf of a client.

A beneficiary contact does not include:

- Unsuccessful attempts to reach a client (for example leaving messages on an answering machine).
- People reached at public events such as presentations or health fairs, or for questions asked during or after a presentation.
- Calls or other contact when the only purpose is to schedule an appointment with a SHIP counselor.
- Calls or other contact when the sole purpose is a referral to another agency or program.

STARS and SHIBA Online comparison

1. Contacts:
   a. SHIBA Online refers to contacts as "Client Contact Records" (CCRs)
   b. STARS refers to contacts as "Beneficiary Contact Forms" (BCs or BCFs).
2. Most of the required fields for beneficiary contacts are the same in both systems.
3. STARS does not have a "Copy Form" feature.
4. STARS has a feature that allows users to group together multiple beneficiary contacts with the same client involving the same issue.
5. STARS has a function that will allow appropriate contacts to be counted for MIPPA and SMP without having to take extra steps. (SHIBA is developing a job aid on this topic.)

6. STARS does not have a system to submit complaints. Clients and volunteers will use the OIC online or paper complaints system instead. www.insurance.wa.gov/file-complaint-or-check-your-complaint-status
7. STARS does not have the ability to start a "Pending" call (also known as a Call Log). SHIBA is working with the OIC IT department to create an alternative system to use with our sponsors who currently get pending call notifications. These sponsors are:
   a. Aging & LTC of Eastern WA (Asotin and Garfield Cos. only)
   b. Benton-Franklin Community Action (Benton, Franklin, Walla Walla, Columbia Cos.)
   c. Community Choice (Chelan, Okanogan, Douglas, Grant, Adams Cos.)
   d. Kitsap Co Div. of ALTC (Kitsap Co.)
   e. Kittitas Co. RSVP (Kittitas Co.)
   f. Senior Services for South Sound (Thurston, Mason Cos.)
   g. Sound Generations (King Co.)
8. There will be more fields in Topics Discussed:
   a. One is required. We suggest clicking all that apply.
   b. ACL will be sharing a user manual soon with definitions for each field.
9. Public and Media Activities reporting is different in STARS. There will be two options:

   1) Group Outreach & Education
   2) Media Outreach & Education

   STARS has developed Job Aids for these and will offer further training to those who report these activities.
10. We will all continue to learn as we use STARS!

Resources: Electronic

SHIP Tracking and Reporting System (STARS)

- STARS Landing page
  stars.entellitrak.com
  - STARS manual, job aids, and support resources: SHIP TA Center

- Log in to STARS
  acl.entellitrak.com

- STARS technical issues or questions for passwords or lockout:
  - Contact the Booz Allen STARS Help Desk
  - BoozAllenSTARSHelpDesk@bah.com

Training materials are available from the STARS Landing page.

See page 2 of the Job Aid STARS submitters User Basics.

Tips and Hints #9: It's a good idea to bookmark the STARS landing web page or save it as a favorite, stars.entellitrak.com.

Resources: Human

Our team is ready to support you!

Dale Ensign, Regional Training Consultant
DaleE@oic.wa.gov | 360-725-7108

Terri Osborne, Regional Training Consultant
TerriO@oic.wa.gov | 360-725-7084

Vanessa Sherrill-Wiemer, Regional Training Consultant
VanessaS@oic.wa.gov | 360-725-7254

Liz Mercer, Program Operations Supervisor
LizM@oic.wa.gov | 360-725-7225

Judith Bendersky, Field Supervisor
JudithB@oic.wa.gov | 360-725-7107

Pam Brannan, Resolution Coordinator
PamB@oic.wa.gov | 360-725-7198

Review

We've covered:

- The STARS beneficiary contact form, including how to fill out both the paper and online versions.
- The STARS desk aid for beneficiary contact user basics.
- The STARS desk aid for beneficiary contacts.
- Some tips and hints for using STARS from SHIP TA and SHIBA.

Reminders and future training

Evaluation
Please fill out the training evaluation. We value your feedback!

Future months will be a variety of in-person and distance education-based training. We'll be coordinating with the RTCs, VCs and sponsors to help ensure successful long-distance training.

STARS questions
Please include your questions about STARS on the back page of this packet and turn in to your RTC.

July training
Topic: VRPM and the Volunteer Handbook

Future training
September - December training: Topics have been planned and will include Medicare along with STARS and VRPM training.

No monthly training is planned for August or December, though there will probably be a need for Volunteer Coordinators to go through some training for STARS and VRPM. We'll keep you posted.

Training course evaluation

Date of Training: _____ Training Location: _____

How can SHIBA improve the monthly trainings?

_____

_____

_____

What additional trainings within our SHIBA scope would you like to see?

_____

_____

_____

What SHIBA training materials (including QRCs) would you like to see added to My SHIBA?

_____

_____

_____

Other:_____

_____

_____

Optional: If you would like to be contacted, please provide your name and contact information. Someone in our office will contact you. Thank you!
Name: _____
Day Phone: _____Email: _____

If you prefer to give electronic feedback about curriculum or training, please contact: Diana Schlesselman: dianas@oic.wa.gov or Liz Mercer: lizm@oic.wa.gov.

Your questions about STARS

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Please give your questions to your RTC after the training session.