

# Data System Tips and Tricks for Program Leaders

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# Agenda

**STARS Tips  
& Tricks**

**STARS to  
SIRS Tips &  
Tricks**

**SIRS Tips  
& Tricks**

# Interactive Process!

1. We'll present a question with answer options
2. Each group will briefly discuss the question and select answer/s
  - Some questions have multiple correct answers
3. Each groups will designate someone to raise a hand and give answer/s
4. We'll call on groups to share their answer
5. We'll share the correct answer/s before moving to the next question

# STARS Tips & Tricks: Question 1

What are STARS actions that only SHIP Director and SHIP Assistant Director users can perform in STARS?

1. Editing data
2. Deleting previously saved forms
3. Assigning CMS Unique IDs to users
4. Accessing the performance measures reports
5. Conducting advanced searches



# STARS Answer: #2 and #3

What are STARS actions that only SHIP Director and SHIP Assistant Director users can perform in STARS?

1. Editing data
2. Deleting previously saved forms
3. Assigning CMS Unique IDs to users
4. Accessing the performance measures reports
5. Conducting advanced searches

# STARS Tips & Tricks: Question 2

You want to know the percentages of the Medicare-eligible population in your state/territory that your program has reached through various contact methods. Where can you find this information?

1. Performance Measures Reports
2. Advanced Search
3. STARS Summary Reports
4. Data Export Reports
5. Resource Report



# STARS Answer: #1 Performance Measures Reports

**CONFIGURATION**

PAGES ▸ SHARED PAGES

**DASHBOARD OPTIONS**

▶ SHIP Performance Measures Report - State and User

| Performance Measure                   | Previous Date Range * | Current Date Range  |                 |                    |
|---------------------------------------|-----------------------|---------------------|-----------------|--------------------|
|                                       |                       | Medicare Population | Total # Reached | Penetration Rate % |
| PM 1: Beneficiary Contacts            | 32,824                | 1,561,160           | 31,011          | 1.99%              |
| PM 2: Group Outreach Contacts         | 15,048                | 1,561,160           | 20,719          | 1.33%              |
| PM 3: Medicare Beneficiaries Under 65 | 4,042                 | 198,024             | 3,979           | 2.01%              |
| PM 4: Total Hard-to-Reach Contacts    | 21,077                | 935,964             | 21,038          | 2.25%              |
| PM 5: Enrollment Contacts             | 25,884                | 1,561,160           | 24,791          | 1.59%              |

▶ MIPPA Performance Measures Report - State and User

| Performance Measure          | Current Date Range                          |               |                 |
|------------------------------|---|---------------|-----------------|
|                              | Total Medicare Beneficiaries Below 150% FPL | Total Reached | Percent Reached |
| PM 1: Overall MIPPA Contacts | 442,352                                     | 12,482        | 2.82%           |

# STARS Tips & Tricks: Question 3

You want to review aggregated demographics for the SHIP and MIPPA team members who worked for your program in any capacity over the past year. Where can you find this information?

1. SHIP Performance Measures Report
2. Advanced Search
3. STARS Summary Reports
4. Data Export Reports
5. Resource Report





# STARS Answer: #5 Resource Report

## Number of Total Active Counselors with the Following Characteristics

|                 | Years With Program |              |            |           |
|-----------------|--------------------|--------------|------------|-----------|
|                 | SHIP-Only          | SHIP & MIPPA | MIPPA-Only | Total     |
| Less Than 1     | 1                  | 11           | 0          | 12        |
| 1 Year Up to 3  | 0                  | 13           | 0          | 13        |
| 3 Years Up to 5 | 0                  | 6            | 0          | 6         |
| More Than 5     | 0                  | 61           | 0          | 61        |
| <b>Total</b>    | <b>1</b>           | <b>91</b>    | <b>0</b>   | <b>92</b> |

|                   | Counselor Age |              |            |           |
|-------------------|---------------|--------------|------------|-----------|
|                   | SHIP-Only     | SHIP & MIPPA | MIPPA-Only | Total     |
| Less Than 65      | 0             | 31           | 0          | 31        |
| 65 Years or Older | 1             | 60           | 0          | 61        |
| <b>Total</b>      | <b>1</b>      | <b>91</b>    | <b>0</b>   | <b>92</b> |

|               | Counselor Gender |              |            |       |
|---------------|------------------|--------------|------------|-------|
|               | SHIP-Only        | SHIP & MIPPA | MIPPA-Only | Total |
| Female        | 1                | 58           | 0          | 59    |
| Male          | 0                | 32           | 0          | 32    |
| Other         | 0                | 1            | 0          | 1     |
| Not Collected | 0                | 0            | 0          | 0     |

|                                     | Counselor Race |              |            |           |
|-------------------------------------|----------------|--------------|------------|-----------|
|                                     | SHIP-Only      | SHIP & MIPPA | MIPPA-Only | Total     |
| American Indian / Alaskan Native    | 0              | 1            | 0          | 1         |
| Asian                               | 0              | 3            | 0          | 3         |
| Black or African American           | 0              | 1            | 0          | 1         |
| Native Hawaiian or Pacific Islander | 0              | 0            | 0          | 0         |
| Hispanic/Latino                     | 0              | 12           | 0          | 12        |
| <b>White</b>                        | <b>1</b>       | <b>68</b>    | <b>0</b>   | <b>69</b> |

# STARS Tips & Tricks: Question 4

You want to know how many beneficiary contacts had MIPPA qualifying topics discussed for a specific partner organization. Where can you find this information?

1. MIPPA Performance Measures Report
2. Standard Search
3. Advanced Search
4. STARS Summary Reports
5. Data Export Reports



# STARS Answer: #1, #4 and #5

You want to know how many beneficiary contacts had MIPPA qualifying topics discussed for a specific partner organization. Where can you find this information?

1. MIPPA Performance Measures Report
2. Standard Search
3. Advanced Search
4. STARS Summary Reports
5. Data Export Reports

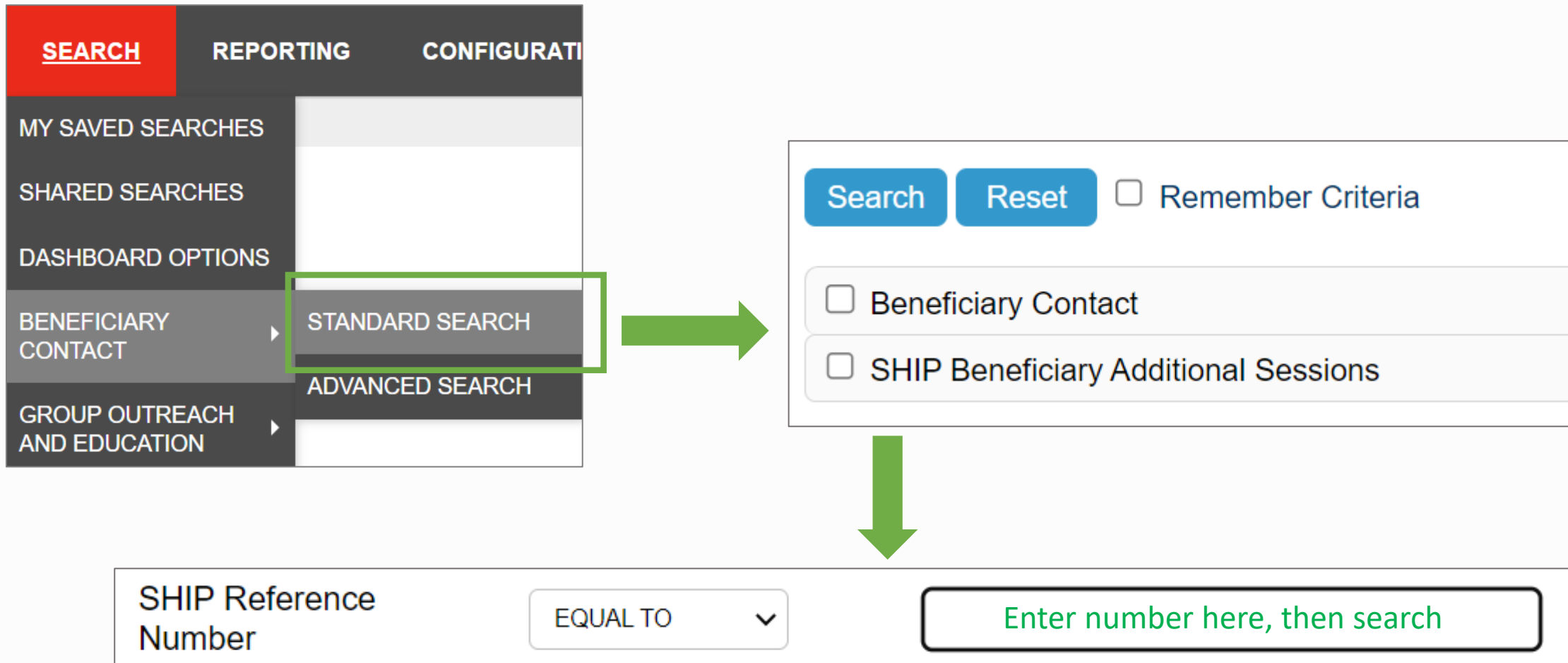
# STARS Tips & Tricks: Question 5

You have the SHIP Reference Number for a specific Beneficiary Contact Form, and you want to review that specific form in STARS for accuracy. Which tool will help you find the form the fastest?

1. Performance Measures Report
2. Standard Search
3. Advanced Search
4. STARS Summary Reports
5. Data Export Reports



# STARS Answer: #2 Standard Search



# STARS Tips & Tricks: Question 6

Is the Part D Enrollment Outcome (PDEO) Quality Assurance Process required?

1. True
2. False



# STARS Answer: True

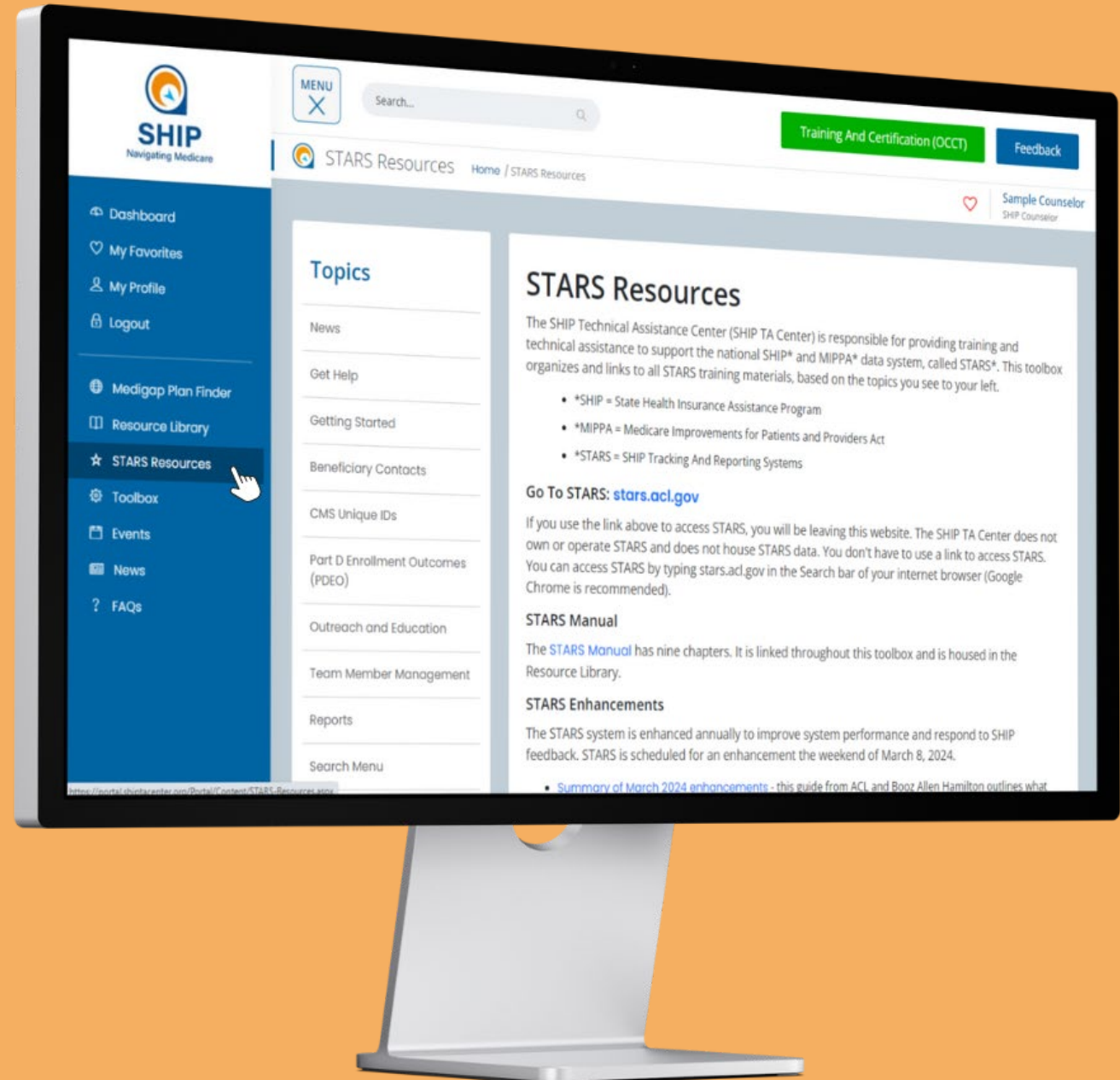
**True.** All SHIP directors must complete the PDEO quality assurance process, *even if* they have opted out of tracking these outcomes in their state or territory.

See the STARS Resources Toolbox for all PDEO training resources

The screenshot displays the SHIP Navigating Medicare website interface. At the top center is the SHIP logo with the tagline "Navigating Medicare". Below the logo is a blue navigation menu with the following items: "Dashboard" (with a notification badge "11"), "My Favorites", "My Profile", "Logout", "Medigap Plan Finder", "Resource Library", and "STARS Resources" (highlighted with a red box). To the right of the navigation menu is a "Topics" sidebar with the following items: "News", "Get Help", "Getting Started", "Beneficiary Contacts", "CMS Unique IDs", "Part D Enrollment Outcomes (PDEO)" (highlighted with a red box), "Outreach and Education", and "Team Member Management".

# STARS Resources

- Use the SHIP Login at [shiphelp.org](http://shiphelp.org)
- You can also get help by email: [stars@shiptacenter.org](mailto:stars@shiptacenter.org)





# STARS to SIRS: Question 1

What is the purpose of the “Send to SMP” function in STARS?

1. To provide a referral to SMP
2. To reduce data entry effort for SHIP and SMP team members
3. To train SHIP team members in SMP
4. To conduct SMP outreach



# STARS to SIRS Answer: #2 Reduce Effort

What is the purpose of the “Send to SMP” function in STARS?

Sending data from STARS to SIRS helps **to reduce data entry effort for SHIP and SMP team members.**

A rectangular button with a green border and the text "Send to SMP" in a blue, sans-serif font.

- The “Send to SMP” function in STARS is **not** a referral mechanism. It’s intended for reducing data entry effort.
- Edits in STARS do **not** transfer to SIRS. Only the original data transfers to SIRS when the "Send to SMP" radio button is selected.
- Any data that was edited in STARS after it was sent to SIRS **must also** be edited in SIRS.

# STARS to SIRS: Question 2

Which of the following must be true for Beneficiary Contact, Group Outreach, and Media Outreach Forms to send to SIRS?

1. **Send to SMP** is marked “Yes”
2. **Topics discussed** selected include at least one that is SMP-qualifying
3. **Session Conducted By** entry is an SMP Team Member\*
- \*4. **Team Member Form** must properly indicate SMP:
  - **SIRS eFile ID** is entered and accurate
  - **Program** field – “SMP” is checked



# STARS to SIRS Answer: all 4 answer options

Beneficiary Contact, Group Outreach, and Media Outreach Forms will send to SIRS if:

1. **Send to SMP** is marked “Yes”
2. **Topics discussed** selected include at least one that is SMP-qualifying
3. **Session Conducted By** entry is an SMP Team Member\*
- \*4. **Team Member Form** must properly indicate SMP:
  - **SIRS eFile ID** is entered and accurate
  - **Program** field – “SMP” is checked

\*Team members marked “SMP” in STARS must be trained in SMP

# STARS to SIRS: Question 3

An SMP/SHIP team member just spoke with a Medicare beneficiary who suspects that their Medicare number was compromised. They need help to resolve the issue, and a referral to the OIG Hotline and CMS is needed. Where do the details associated with the referral of this case need to be entered?

1. Beneficiary contact form in STARS
2. Individual Interaction form in SIRS (after clicking “No” to add more information)
3. Individual Interaction form in SIRS (after clicking “Yes” to add more information)



# STARS to SIRS Answer: #3 SIRS Individual Interaction form (Add More Information)

Where do the details associated with referrals to the OIG and CMS need to be entered?

Regardless of whether the case starts in STARS or SIRS, the details needed to complete the SMP complex interaction and make a referral must be entered in SIRS on the Individual Interaction form (after clicking “Yes” to add more information).

Add More Information?  Yes  No

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**Additional Information (complex)**

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# SIRS Tips & Tricks: Question 1

Your subcontractors are each contracted to do 5 SMP presentations a month. Which report could you use in SIRS to confirm that they've done this?

1. OIG Report (by Site)
2. All in One Reports
3. Time Spent Report
4. CMS Unique IDs Report
5. Fraud, Error, Abuse Trend Report



# SIRS Answer: #2 – All in One Site Report

Which SIRS report could you use to confirm your subcontractor is doing 5 SMP presentations a month?

**CONFIGURATION**

PAGES ▶ **SHARED PAGES**

|   | Name                                       |
|---|--|
| ▶ | CMS Unique IDs Report - State              |
| ▶ | Complex Interaction Report                 |
| ▶ | Fraud, Error, Abuse Trend Report           |
| ▶ | Incomplete Interactions Report Launch Page |
| ▶ | OIG Report Launch Page                     |
| ▶ | <b>SIRS All In One Reports</b>             |
| ▶ | SIRS Summary Reports                       |

1)\* Please select your Report Criteria:

Report: SIRS All In One Site

State / Sub-state / Org: Marshall Islands

Include Sites?

2)\* Please select your Date Range:

| Site                    | Group Outreach and Education |                                    |                   |
|-------------------------|------------------------------|------------------------------------|-------------------|
|                         | Number of Interactions       | Estimated Number of People Reached | Time Spent        |
| Marshall Islands        | 10                           | 460                                | 106.35            |
| Marshall Islands Site 1 | 2                            | 25                                 | 1.42              |
| Marshall Islands Site 2 | 3                            | 40                                 | 2.50              |
| Marshall Islands Site 3 | 10                           | 56720949                           | 1995244.07        |
| Blanks                  | 0                            | 0                                  | 0.00              |
| <b>Total</b>            | <b>25</b>                    | <b>56721474</b>                    | <b>1995354.33</b> |



# SIRS Tips & Tricks: Question 2

What if you want more details? For example, what if you want to know if the events were in-person, virtual, or hybrid? Which other report could you use?

1. Incomplete Interactions Report
2. Time Spent Report
3. SIRS Summary Reports (Group Outreach)
4. SIRS Summary Reports (Media Outreach)
5. All in One Reports



# SIRS Answer: #3 SIRS Summary Reports – Group Outreach

What if you want more details?



1)\* Please select your Report Criteria:

Report:

2)\* Please select your Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

| Name   |
|--|
| ▶ CMS Unique IDs Report - State              |
| ▶ Fraud, Error, Abuse Trend Report           |
| ▶ Incomplete Interactions Report Launch Page |
| ▶ OIG Report Launch Page                     |
| ▶ SIRS All In One Reports                    |
| ▶ SIRS Summary Reports                       |

| Delivery Method                  |   |
|----------------------------------|---|
| In-Person                        | 3 |
| Web-Based                        | 1 |
| Hybrid (in-person and web-based) | 0 |

# SIRS Tips & Tricks: Question 3

In your grant application, you said you were going to increase your volunteer recruitment efforts through various media efforts. Which report will help you know how many media efforts were specific to volunteer recruitment?

1. Incomplete Interactions Report
2. Time Spent Report
3. SIRS Summary Reports (Group Outreach)
4. SIRS Summary Reports (Media Outreach)
5. All in One Reports



# SIRS Answer: #4 SIRS Summary Reports – Media Outreach

Which report will help you know how many media efforts were specific to volunteer recruitment?



**1)\* Please select your Report Criteria:**

Report: SIRS Media Outreach Summary Report – Partner Organization Affiliation

State / Sub-state / Org: Marshall Islands Site 1

**2)\* Please select your Date Range:**

Start Date (mm/dd/yyyy): 03/01/2023

End Date (mm/dd/yyyy): 03/31/2023

| Name   |
|--|
| ▶ CMS Unique IDs Report - State              |
| ▶ Fraud, Error, Abuse Trend Report           |
| ▶ Incomplete Interactions Report Launch Page |
| ▶ OIG Report Launch Page                     |
| ▶ SIRS All In One Reports                    |
| ▶ SIRS Summary Reports                       |

| Topic(s) Discussed        | Count |
|---------------------------|-------|
| Conditional Payments      | 0     |
| Consumer Protection       | 0     |
| SMP Program Information   | 4     |
| SMP Volunteer Recruitment | 1     |

# SIRS Tips & Tricks: Question 4

What other fields of data in the summary reports could be used to help tell your SMP's story?

1. Targeted Beneficiary Audience
2. Type of Event
3. Type of Media
4. Intended Audience
5. Fraud Trends



# SIRS Answer: All five!

What other fields of data in the summary reports could be used to help tell your SMP's story?

| Targeted Beneficiary Audience(s) |
|----------------------------------|
| General                          |
| Homebound                        |
| Long Term Care Residents         |
| Low Income                       |
| Native American                  |
| Non English Speaking             |
| People with Disabilities         |
| Racial/Ethnic Minority           |
| Rural                            |
| Not Collected                    |
| Other                            |

| Type of Event           |
|-------------------------|
| Community Event         |
| Group Education Session |

| Type of Media |
|---------------|
| Billboard     |
| Email         |
| Magazine      |
| Newsletter    |
| Newspaper     |
| Radio         |
| Social Media  |
| Television    |
| Website       |
| Other         |

| Intended Audience         |
|---------------------------|
| Beneficiaries             |
| Family Members/Caregivers |
| General Audience          |
| Health Care Providers     |
| Law Enforcement           |
| Partner Organizations     |
| Other                     |

| Details of Fraud, Error, or Abuse         |
|---|
| Ambulance                                 |
| Durable Medical Equipment (DME)           |
| Cardiac Genetic Testing                   |
| COVID-19                                  |
| Genetic/DNA Testing                       |
| Home Health Care                          |
| Hospice                                   |
| Medical Identity Theft                    |
| Medicare Advantage                        |
| Medicare Card                             |
| Medicare Part D Prescription Drug Plan    |
| Opioids                                   |
| Outpatient Mental Health                  |
| Prescription Drugs/Compounded Medications |
| Skilled Nursing                           |
| Vaccines                                  |
| Telehealth                                |
| Detail(s) of Other Fraud, Error, or Abuse |

# SIRS Tips & Tricks: Question 5

What are the top 5 data entry issues that you should check in SIRS every month?



# SIRS Answer: Top 5 Monthly Data Checks

What are the top 5 data entry issues that you should check in SIRS every month?

1. Staff time/activities (Performance Measures 1 – 2)
2. High & low interaction time (Performance Measures 1 – 2)
3. High & low “people reached” (Performance Measures 3 – 4)
4. Duplicate team members (Performance Measures 1 – 2)
5. Out of state reference numbers

**Tip:** For details, see the SIRS Monthly Data Review Tip Sheet in the SMP Resource Library.



# SIRS Tips & Tricks: Question 6

Which training resources can I use to help myself and my team enter data in SIRS and help me (and other program leaders) review data in SIRS?



# SIRS Answer, Part 1: SIRS Curricula in TRAX

[www.smpresource.org](http://www.smpresource.org) > TRAX > Available Training

| SIRS/OIG Curricula                                  | Brief Description   |
|---|---|
| <b>SIRS Training – Basic Data Entry Curriculum</b>  | Intended to help SMPs enter their own basic data in SIRS  |
| <b>SIRS Training Series Curriculum</b>              | Provides comprehensive training on how to enter, review, and edit data and team members in SIRS         |
| <b>SMP Complex Interactions Training Curriculum</b> | Provides training on how to manage SMP complex interactions, conduct referrals, and close cases in SIRS |
| <b>OIG Report Training Curriculum</b>               | Intended to help SMPs review and correct their OIG Report data  |

**Need Help with SIRS** (*after taking your training*)? Email [SIRS@smpresource.org](mailto:SIRS@smpresource.org).

# SIRS Answer, Part 2: SIRS Training Series

[www.smpresource.org](http://www.smpresource.org) > Events

## Entering and Editing Your Own Data

- Monday, July 29
- 3:00 – 4:30 p.m. Eastern Time

## Entering and Editing Team Members

- Monday, August 5
- 3:00 – 4:30 p.m. Eastern Time

## Entering and Editing Data for Others

- Monday, August 12
- 3:00 – 4:30 p.m. Eastern Time

## Reviewing Data

- Monday, August 26
- 3:00 – 4:30 p.m. Eastern Time

# Questions and Discussion



# Speaker Contact Information

## Thank you!

**Ginny Paulson**

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