

# NEW DIRECTOR TRAINING

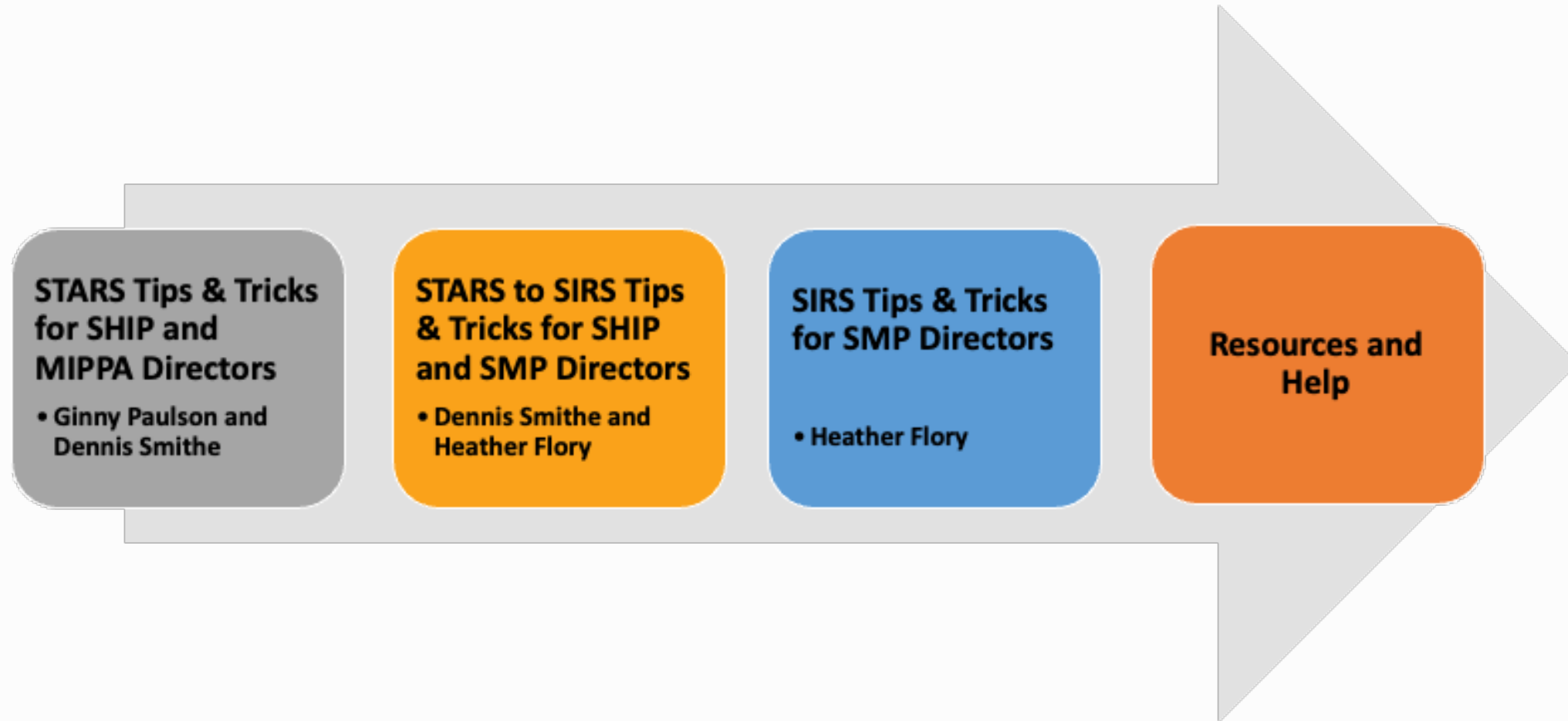
February 21–22, 2024 | Washington, DC

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## Data System Tips and Tricks for Directors

February 21, 2024

# Agenda



# Interactive Process!

1. We'll present a question with answer options
2. Each group will briefly discuss the question and agree upon 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 each group 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 Data
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 Data
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 learn about the demographics of your active SHIP, SMP, and MIPPA team members. 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 have counselors who handle complex cases and may need to contact 1-800-Medicare or a Medicare plan on their client's behalf. What STARS report helps you and users with a SHIP Assistant Director role see who has access to this privilege?

1. SHIP Performance Measures Report
2. CMS Unique IDs Report
3. STARS Summary Report
4. Data Export Report
5. Resource Report



# STARS Answer: #2 CMS Unique IDs Report

**CONFIGURATION**

PAGES ▶ SHARED PAGES

**DASHBOARD OPTIONS**

▶ CMS Unique IDs Report - State

First Name:	Last Name:	Organization:	State:	County:	Status:	CMS Unique ID:	Date of Last CMS Unique ID Status Update:
Bluey	Dog	Virginia SHIP	Virginia	Prince William	Inactive	51806022	11/10/2022
Bingo	Dog	Virginia SHIP	Virginia	Prince William	Inactive	51724935	11/10/2022
Daffy	Duck	Virginia Site 1020	Virginia	Prince William	Active	51409257	11/30/2023
Test	FRX	Virginia SHIP	Virginia	Fairfax	Inactive	51399965	01/08/2023

# STARS Tips & Tricks: Question 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 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

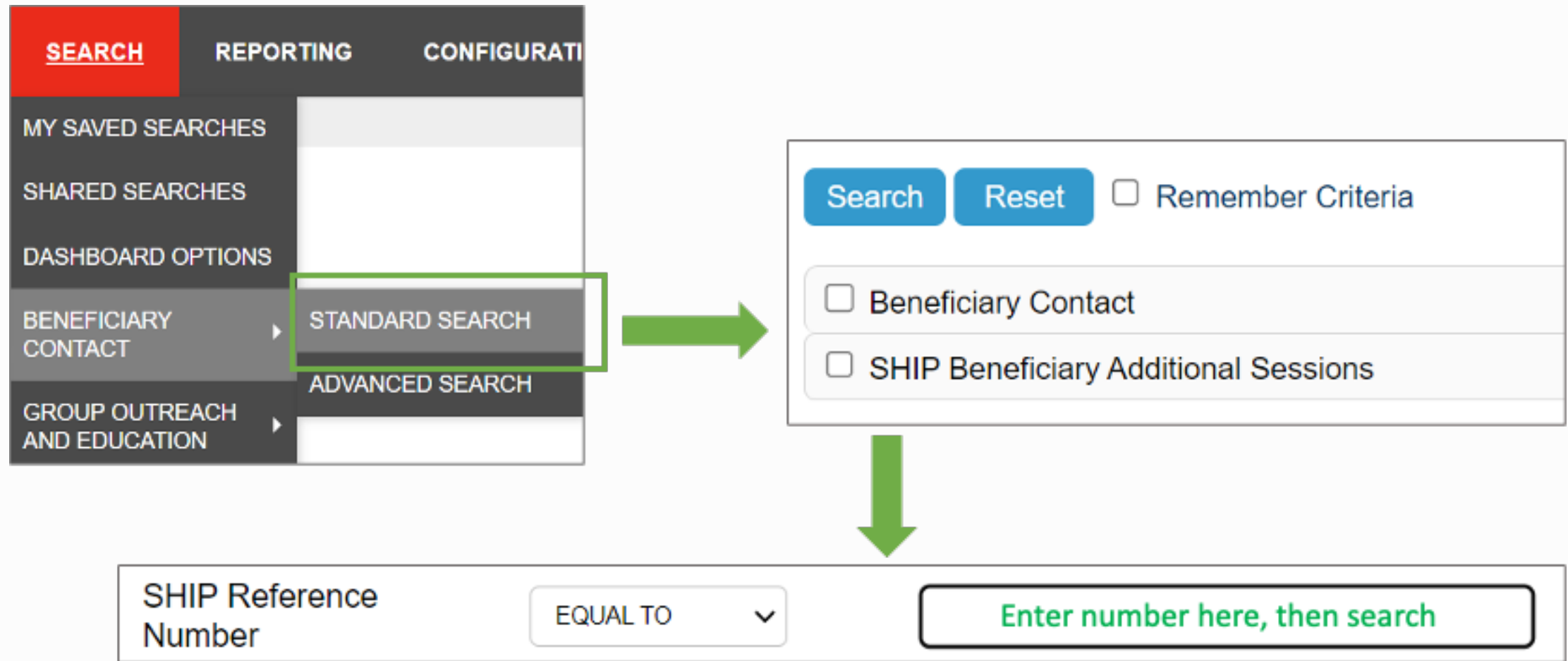
# STARS Tips & Tricks: Question 6

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 7

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

1. True
2. False

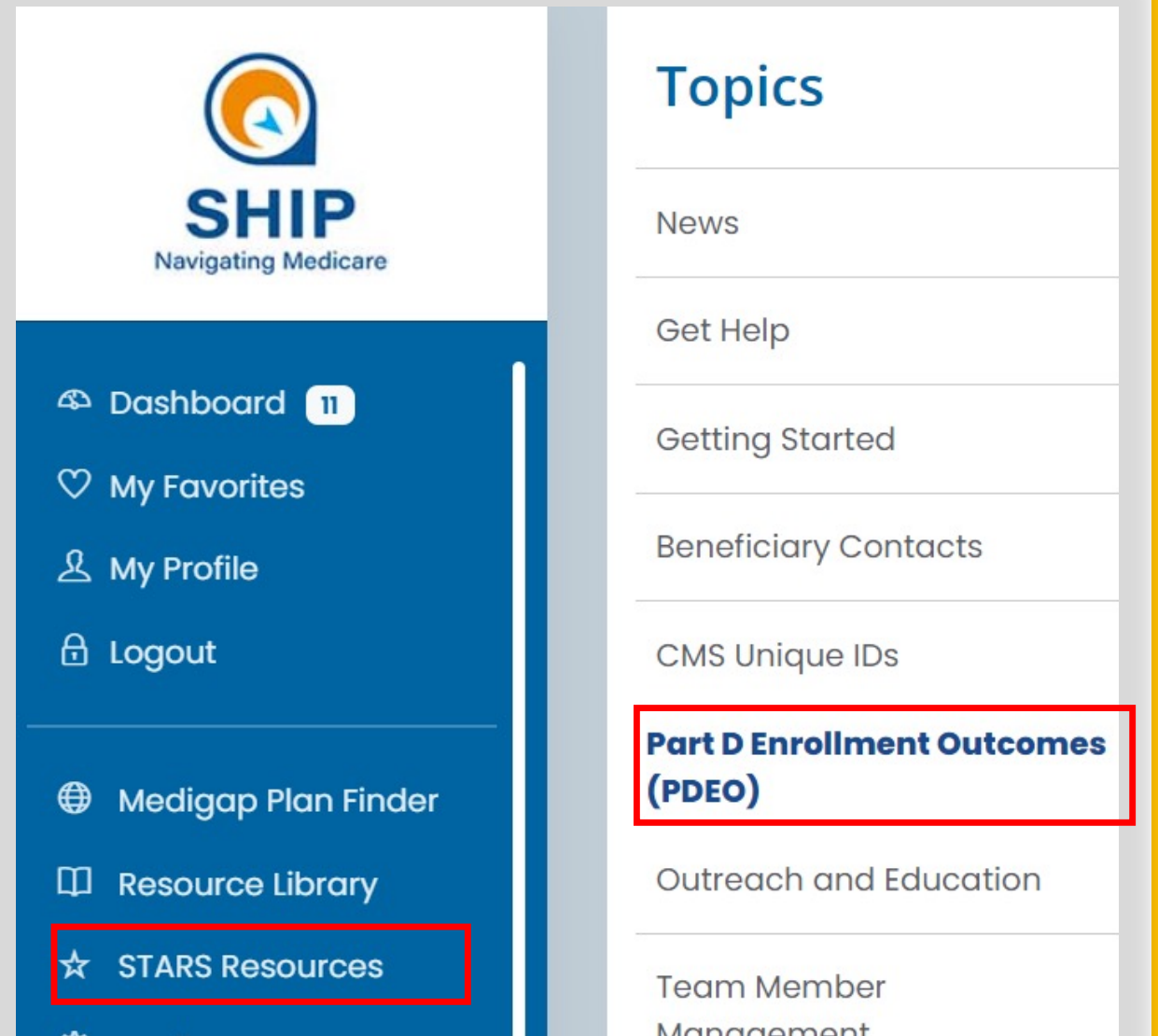




# STARS Answer: True

**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



# 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

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

Send to SMP

- 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 a STARS form to be sent to SIRS?

1. The correct SIRS eFile ID must be entered on the STARS Team Member Form of the team member selected in the “Session conducted by” field.
2. “SMP” must be checked in the Program field on that person’s Team Member Form.
3. “Send to SMP” must be set to “Yes”
4. SMP-qualifying topics must be selected.



# STARS to SIRS Answer: all 4 answer options

## “Send to SMP” **required** data fields

### Team Member Form:

- Make sure that the SIRS eFile ID is entered correctly.
- “SMP” must be checked in the Program field (and the team member must be trained in SMP).

### Beneficiary Contact, Group Outreach, and Media Outreach Forms:

- “Send to SMP” must be set to “Yes”.
- SMP-qualifying topics must be selected.

# 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)

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 subcontractor is 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 State)
2. OIG Report (by Site)
3. Time Spent Report
4. CMS Unique IDs Report
5. Fraud, Error, Abuse Trend Report





# SIRS Answer 1: OIG Report by Site

HOME TRACKING INBOX SEARCH REPORTING **CONFIGURATION**

Configuration » Pages » Shared Pages

PAGES SHARED PAGES

Shared Pages Dashboard Options DASHBOARD OPTIONS

Name	Description
▶ CMS Unique IDs Report - State	This launch page launches the CMS Unique IDs Report - State.
▶ Fraud, Error, Abuse Trend Report	This page launches all of that Fraud Error Abuse Trend Reports
▶ Incomplete Interactions Report Launch Page	This launch page launches the Incomplete Interactions Report
▶ <b>OIG Report Launch Page</b>	This launch page launches the OIG Report for SMP users and national level rolls.

1)\* Please select the desired Site:

Site:

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

PERFORMANCE MEASURES	Total
1.) Number of active SMP team members	2
2.) Number of SMP team member hours	6.5
<b>3.) Number of group outreach and education events</b>	<b>2</b>
4.) Estimated number of people reached through group outreach and education	36
5.) Number of individual interactions with, or on behalf of, a beneficiary	4

# 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)



# SIRS Answer 2: SIRS Summary Reports – Group Outreach



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

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

Report:

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

**End Date (mm/dd/yyyy):**

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)



# SIRS Answer 3: SIRS Summary Reports – Media Outreach



**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	
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



# SIRS Answer 4: All four!

Targeted Beneficiary Audience(s)	Type of Event	Type of Media	Intended Audience
General	Community Event	Billboard	Beneficiaries
Homebound	Group Education Session	Email	Family Members/Caregivers
Long Term Care Residents		Magazine	General Audience
Low Income		Newsletter	Health Care Providers
Native American		Newspaper	Law Enforcement
Non English Speaking		Radio	Partner Organizations
People with Disabilities		Social Media	Other
Racial/Ethnic Minority		Television	
Rural		Website	
Not Collected		Other	
Other			

# SIRS Tips & Tricks: Question 5

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

**SIRS**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_





# SIRS Answer 5: Monthly Data Checks

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

# SIRS Tips & Tricks: Question 6

Which training resources can I use to help myself and my team enter data in SIRS and help me complete my monthly data checks in SIRS?



# SIRS Answer 6: SIRS Curricula in TRAX

<b>SIRS/OIG Curricula</b>	<b>Brief Description</b>
<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

# SIRS Resources and Help

1

Step 1: Login at  
[www.smpresource.org](http://www.smpresource.org).

2

Step 2: Click TRAX >  
Available Training to  
access SIRS and other  
training curricula in  
TRAX.

3

Step 3: Email  
[SIRS@smpresource.org](mailto:SIRS@smpresource.org)  
for help.

# STARS Resources and Help



Step 1: Login at [www.shiphelp.org](http://www.shiphelp.org).



Step 2: Click the STARS Resources menu to access all STARS training materials.



Step 3: Email [stars@shiptacenter.org](mailto:stars@shiptacenter.org) for help.

# Questions and Discussion



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