Chapter 3: Team Member Management

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

Contents

Introduction

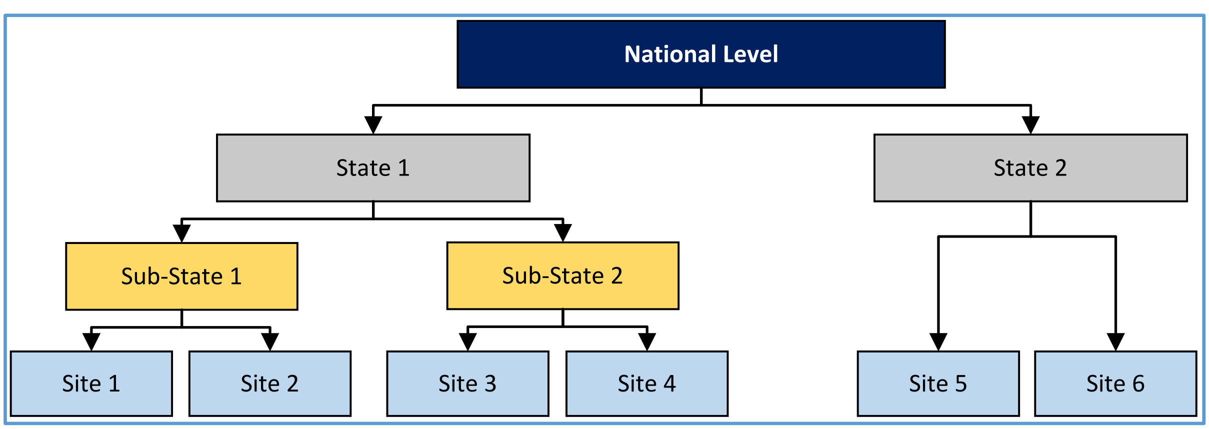
This chapter is a reference guide to understanding, creating, and editing SHIP team member profiles in STARS, including assigning CMS (Centers for Medicare & Medicaid Services) Unique IDs. Team member access to STARS is based on nine different user roles. Of those nine roles, only five are able to create and edit team members, including assigning those team members the appropriate user roles. Regardless of whether or not they will be entering data, all SHIP team members must be entered into STARS before their activities can be reported. Only those SHIP team members responsible for entering data need STARS credentials (username and password), however.

Definition of a Team Member

The term "team member" refers to all SHIP team members, regardless of their paid status (i.e. SHIP-paid, in-kind paid, and SHIP volunteers) and the type of work they perform (i.e. counseling, presenting, administration, etc.).

STARS Hierarchy and STARS User Roles

The abilities of each STARS user depends where they are aligned within the STARS hierarchy. Each SHIP's hierarchy was established by SHIP directors in advance of the 2018 STARS launch and can only be edited by Booz Allen Hamilton with permission from ACL. Each entity in the hierarchy represents a *Partner Organization*. National Level organizations include Booz Allen Hamilton, ACL, and the SHIP TA Center. State level organizations are SHIPs. SHIP directors chose to use a three-level hierarchy, like State 1 in the example below, a two-level hierarchy,



like State 2 in the example below, or no hierarchy (i.e. State-level only).

The total number of Sub-States (i.e. *regions*) and/or Sites was determined by each SHIP director, and SHIP directors can add or retire organizations from the hierarchy, when needed. STARS access is driven by this hierarchy, and data visibility flows downward, as indicated by the downward pointing arrows in the flow chart. Each team member can only be aligned with one *Partner Organization*. This, along with the team member's user role, determines the amount and kind of data visible to each users.

Tips and Guidelines for Using the STARS Hierarchy Effectively

- ✓ Have a copy of your program's STARS Hierarchy available when you are creating team members.
- ✓ If there are Partner Organizations in your state at the Sub-State level, know which Sites sit below them.
- ✓ Align each team member with the proper Partner Organization.
    - o For example, if they need to enter data for more than one Site, or if they conduct work for more than one Site, they will need to be aligned with the State or with a Sub-State level organization.
- ✓ **Important:** Team members must only be entered into STARS *once.* Multiple accounts in one state/territory for a given team member are not allowed.
    - o *Note:* Team members who work for more than one state, such as snowbird volunteers, are the exception. They need a team member account in each state.

State Level User Roles

First, we will explore user roles and their capabilities for users aligned at the State level in the STARS hierarchy. State-level users can access data at the State level, Sub-State level, and Site level, within the confines of their role capabilities.

Role name	State Level Role Capabilities
1. SHIP Director	**Can:** – Can only be created by Booz Allen Hamilton (with ACL approval) – Can create/edit/view all types of forms within STARS, with one exception: * *Unable to edit certain fields on their own Team Member Form* – Can add/edit Activity Forms for all team members, including for themselves – Can view own Unique ID number (on the Team Member Form) – Can manage CMS Unique IDs – Can search all data in STARS – Can use all STARS reports in the Configuration menu – Can delete data
	Cannot:

	– Cannot create other SHIP director users – Cannot edit certain fields on their *own* Team Member form – Cannot manage own CMS Unique ID
2. SHIP Assistant Director	**Can:** – Can only be created by the SHIP director – Can create/edit/view any form within STARS, with two exceptions: ** Unable to create/edit Team Members at their own role or higher (view only)* ** Unable to edit certain fields on their own Team Member Form* – Can add/edit Activity Forms for all team members, including for themselves – Can view own CMS Unique ID number, if applicable (on the Team Member Form) – Can manage CMS Unique IDs – Can search all data in STARS – Can use all STARS reports in the Configuration menu – Can delete data
	Cannot: – Cannot create other SHIP Assistant Director users – Cannot edit certain fields on their *own* Team Member form – Cannot manage own CMS Unique ID
3. State Staff	**Can:** – Can only be created by the SHIP director or a SHIP Assistant Director – Can create/edit/view any form within STARS, with two exceptions: ** Unable to create/edit Team Members at their own role or higher (view only)* ** Unable to edit certain fields on their own Team Member Form* – Can add/edit Activity Forms for all team members, including for themselves – Can view own Unique ID number, if applicable (on the Team Member Form) – Can search all data in STARS – Can use all STARS reports in the Configuration menu with one exception: ** Unable to use Unique ID report*
	Cannot: – Cannot create other State Staff users or higher – Cannot edit certain fields on their *own* Team Member form – Cannot manage CMS Unique IDs – Cannot see others' Unique IDs on others' Team Member Forms – Cannot access Unique ID Report in the Configuration menu – Cannot delete data
Other Roles	*Team Member and STARS Submitter user roles can be aligned to the any of the three levels in the STARS organizational hierarchy. Their lower capabilities are described separately.*

Sub-State Roles

Next, we will explore user roles and their capabilities for users aligned at the Sub-State level in the STARS hierarchy. Sub-State-level (i.e. regional) users can access data at the Sub-State level and Site level, within the confines of their role capabilities. The main difference between the Sub-State Manager and the Sub-State Staff roles is that only Sub-State Managers can create team members and access reports. The chart below outlines their differences in detail.

Site-Level Roles

Role name	Sub-State Level Role Capabilities
4. Sub-State Manager	**Can:** – Can only be created by the SHIP director, a SHIP Assistant Director, or a State Staff user – Can create/edit/view any form at the Sub-State level and Sites below it, with two exceptions: * *Unable to create/edit other Sub-State Manager users (view only)* * *Unable to edit certain fields on their own Team Member Form* – Can add/edit Activity Forms for all team members at the Sub-State level and Sites below it, including for themselves – Can view own Unique ID number, if applicable (on the Team Member Form) – Can search all data at the Sub-State level and Sites below it – Can use all reports in the Configuration menu at the Sub-State level and Sites below it with one exception: * *Unable to use Unique ID report*
	Cannot: – Cannot create other Sub-State Manager users or higher – Cannot edit certain fields on their *own* Team Member form – Cannot manage CMS Unique IDs – Cannot see others' Unique IDs on others' Team Member Forms – Cannot access Unique ID Report in the Configuration menu – Cannot delete data
5. Sub-State Staff	**Can:** – Can only be created by a Sub-State Manager within the same Sub-State or by any State-level user with the ability to create team members – Can create/edit/view any form at the Sub-State level and Sites below it, with two exceptions: * *Unable to create or edit any Team Member Forms (can view only)* – Can add/edit Activity Forms for all team members at the Sub-State level and Sites below it, including for themselves – Can view own Unique ID number, if applicable (on the Team Member Form) – Can search all data at the Sub-State level and Sites below it
	Cannot: – Cannot create Team Member Forms – Cannot edit certain fields on their *own* Team Member form – Cannot see *others'* Unique IDs on *others'* Team Member Forms – Cannot access reports in the Configuration menu – Cannot delete data
Other Roles	*Team Member and STARS Submitter user roles can be aligned to the any of the three levels in the STARS organizational hierarchy. Their lower capabilities are described separately.*

Here we will explore user roles and their capabilities for users aligned at the Site level in the STARS hierarchy. Site-level users can only access data in their Site and within the confines of their role capabilities. The main difference between the Site Manager and the Site Staff roles is that only Site Managers can create team members and access reports. The chart below outlines their differences in detail.

Role name	Site Level Role Capabilities
6. Site Manager	**Can:** – Can only be created by a Site Manager within the same Site or by any Sub-State or State-level user with the ability to create team members – Can create/edit/view any form at the Site level, with two exceptions: ** Unable to create/edit other Site Manager users (view only)* ** Unable to edit certain fields on their own Team Member Form* – Can add/edit Activity Forms for all team members at the Site level, including for themselves – Can view own Unique ID number, if applicable (on the Team Member Form) – Can search all data at the Site level – Can use all reports in the Configuration menu at the Site level with one exception: ** Unable to use Unique ID report*
	Cannot: – Cannot create other Site Manager users or higher – Cannot edit certain fields on their *own* Team Member form – Cannot manage CMS Unique IDs – Cannot see others' Unique IDs on others' Team Member Forms – Cannot access Unique ID Report in the Configuration menu – Cannot delete data
7. Site Staff	**Can:** – This role can be created by a Site Manager within the same Site or by a Sub-State manager or a state-level user with the ability to create team members – Can create/edit/view any form at the Site level, with one exception: ** Unable to create/edit any Team Member Forms, including their own (can view only)* – Can add/edit Activity Forms for all team members at the Site level, including for themselves – Can view own Unique ID number, if applicable (on the Team Member Form) – Can search all data at the Site level
	Cannot: – Cannot create or edit Team Member Forms – Cannot see *others'* Unique IDs on *others'* Team Member Forms – Cannot access reports in the Configuration menu – Cannot delete data
Other Roles	*Team Member and STARS Submitter user roles can be aligned to the any of the three levels in the STARS organizational hierarchy. Their lower capabilities are described separately.*

Team Member and STARS Submitter Roles

Last, we will describe the two STARS user roles that can be placed at any of the three levels of the STARS organizational hierarchy. These are the two "lower" roles in terms of their capabilities, even though they may be placed at the State or Sub-State level and would have access to a greater amount of data than users aligned below them in the STARS hierarchy.

It should be noted that the Team Member user role is not to be confused with the generic term "team member." The generic term "team member" refers to all SHIP representatives who do SHIP work and who have a Team Member Form completed about them in STARS. The Team Member user role has the specific capabilities outlined in the chart below.

The main difference between the Team Member role and the STARS Submitter role is that Team Members have the Search menu and can view data entered by others about others. STARS Submitters must use their Tracking Inbox to view data, and they can only view data they entered or data that was entered by someone else about *their* efforts (i.e. their name appears in the *Session Conducted By* field). The chart below outlines their capabilities in detail.

Role Name	Role Capabilities
8. Team Member	**Can:** – Can be placed anywhere in the hierarchy (State, Sub-State, or Site level) – Can be created by any user with the ability to create team members – Can create and edit forms about their own efforts or the efforts of *others* at or below their level in the hierarchy, with one exception: * *Unable to create/edit any Team Member Forms* – Can edit forms they created – Can add/edit Activity Forms to their <u>own</u> Team Member Form – Can view own Unique ID number, if applicable (on own Team Member Form) – Can access Search menu – Can search and view forms they created or that were created by others, at and below their level in the hierarchy, with one exception: * *Unable to view any Team Member Form other than their own* – Can edit forms created by others about their <u>own</u> efforts (i.e. their <u>own</u> name appears in *Session Conducted By* field)
	Cannot: – Cannot edit forms created by others about others' efforts – Cannot add Additional Sessions or Additional Team Members to forms created by others about others' efforts – Cannot create, edit, or view others' Team Member Forms – Cannot edit own Team Member Form – Cannot access reports in the Configuration menu – Cannot delete data

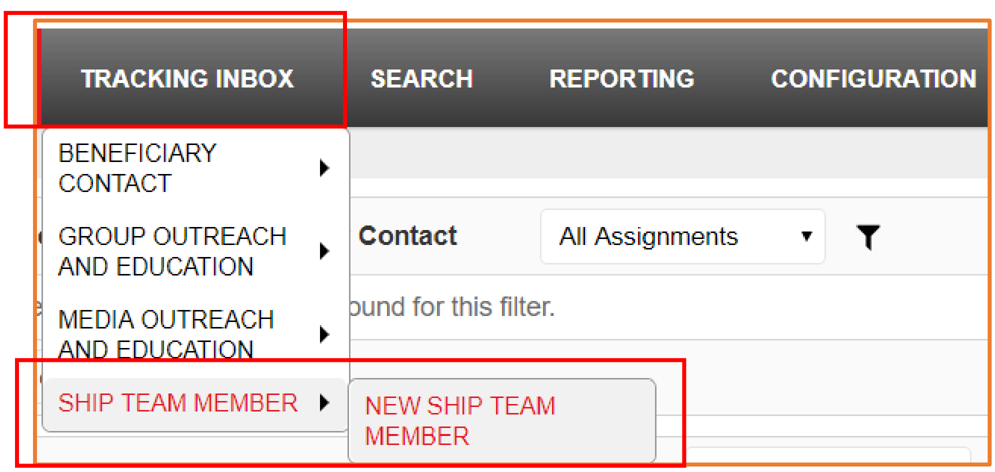
9. STARS Submitter	**Can:** – Can be placed anywhere in the hierarchy (State, Sub-State, or Site level) – Can be created by any user with the ability to create team members – Can create and edit forms about their own efforts or the efforts of *others* at or below their level in the hierarchy, with one exception: * *Unable to create/edit any Team Member Forms* – Can edit forms they created – Can add/edit Activity Forms to their <u>own</u> Team Member Form – Can view own Unique ID number, if applicable (on own Team Member Form) – Can edit forms created by others about their <u>own</u> efforts (i.e. their <u>own</u> name appears in *Session Conducted By* field)
	Cannot: – Cannot use the Search menu and therefore cannot access, view, or add anything to forms created by others about others' efforts – Cannot create, edit, or view others' Team Member Forms – Cannot edit own Team Member Form – Cannot access reports in the Configuration menu – Cannot delete data

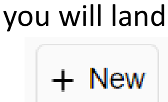
✓ **For a short at-a-glance reference to the capabilities of the nine different STARS user roles, review the STARS User Roles Overview handout.**

Create Team Member

Login to STARS and, from the Home page, select *Tracking Inbox > SHIP Team Member > NEW SHIP Team Member.*

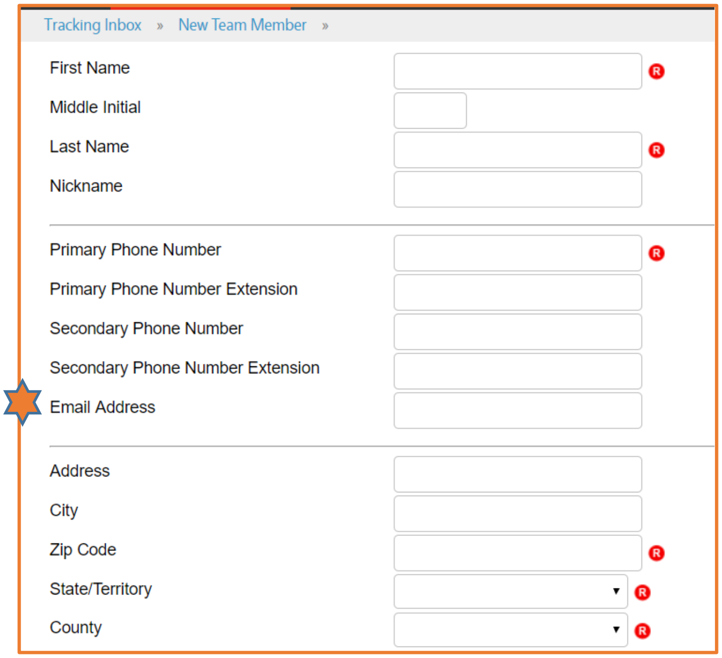
- Note: You can ignore the "Assignments" drop-down list associated with Tracking Inboxes. The Assignments functionality is not being used in STARS.



✓ **Tip:** If you click *SHIP Team Member* instead of *New SHIP Team Member*, you will land on the Team Member Tracking Inbox. From there, click the "New" button. 

Enter Basic Contact Information

Fields marked with a red R are required.



- First Name: Becomes part of the user name
- Last Name: Becomes part of the user name)
  - Note: First name or last name typos will transfer into the user name. Be accurate. User names cannot be edited later.
- Primary Phone Number
- Zip Code
  - Auto-populates the county field; Must be a zip code associate with a physical address, not a P.O. Box.
- State/Territory
  - Select your State/Territory from the list
- County: Auto-populates based on county.

(!) **IMPORTANT:** Though Email Address is not technically a required field, it is required for STARS to send team members their user credentials. If you attempt to send user credentials without an entered email address, this Workflow Message appears upon saving.

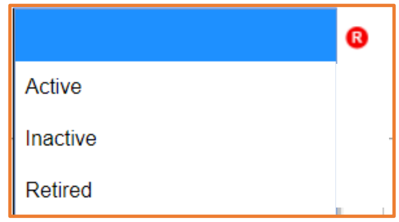
> **Workflow Messages**
> - **The record has been updated, but user credentials have not been sent. Please enter an email address to send user credentials.**

- *Note*: An email address is also required for the *forgot password* functionality. Users without email addresses can call the STARS help desk at Booz Allen Hamilton to receive their credentials and password. Also, if an email address appears more than once in STARS (and/or SIRS), the user/s of that email address will be *unable* to use the *forgot password function* and must call Booz Allen Hamilton for password support.

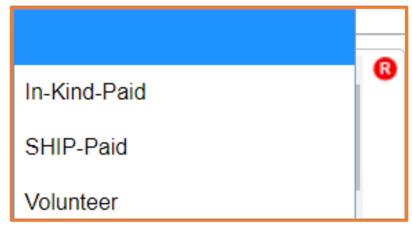
- *Start Date (R)*: Use the calendar icon date selector to complete the start date or enter the date manually.

  - *Note*: The End Date will be completed later, when the team member is no longer with your program.

Status



- *Status (R):* When entering new team members, it is assumed that they have an "Active" program *Status*. You should inactivate and retire members in STARS, when applicable (addressed later in this chapter). See the Beneficiary Contacts chapter (Chapter 4) for a detailed definition of *Active* for team members who provided counseling, information, or assistance related to Medicare or other health insurance.
- *Partner Organization Affiliation (R):* These were set up within your site hierarchy; pick from the state, sub-state, or site-specific drop down list (not pictured because the lists are state specific).
- *Paid Status (R):* Make the appropriate selection for this team member. These terms are defined by ACL.



Paid Status Definitions

In-Kind-Paid: Paid by a program other than SHIP. For example:

- ✓ In-Kind Counselor: Individuals who provided SHIP counseling during the reporting period; were registered SHIP counselors who were trained and have signed some type of Counselor Agreement or Memorandum of Understanding (MOU). They received compensation for their time and services from a program other than SHIP.
- ✓ In-Kind Coordinator: Individuals who performed the SHIP coordinator functions and received compensation for their time and services from a program other than SHIP.

SHIP-Paid: Paid by the SHIP program. For example:

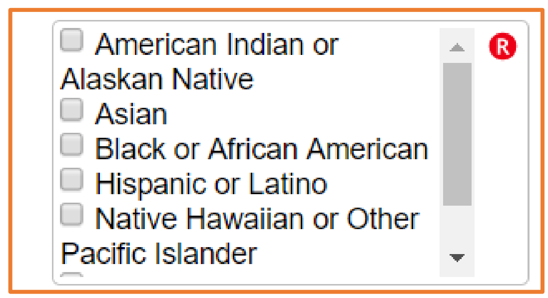
- ✓ SHIP-Paid counselors: Individuals who provided SHIP counseling during the reporting period; were registered SHIP counselors who were trained and have signed some type of Counselor Agreement or Memorandum of Understanding (MOU). They received compensation for their time and services from the SHIP program, regardless of whether their salary was funded by ACL, the state, or some other funding agency.
- ✓ SHIP-Paid Coordinator: Performed the SHIP coordinator functions and received any compensation for their time and services from the SHIP program, regardless of whether their salary was funded by ACL, the state, or some other funding agency.
- ✓ Other SHIP-Paid: Individuals who performed other functions for the SHIP aside from the counselor and coordinator functions described above. Examples of other paid staff include state project directors, trainers, receptionists, and administrative staff. These types of paid staff can work in the state office or at local/field sites.

Volunteer: Performed SHIP functions without any compensation for their time and services. For example:

- ✓ Volunteer counselors: Provided SHIP counseling hours during the reporting period and were registered volunteer counselors. They were trained and have signed some type of Counselor Agreement or Memorandum of Understanding (MOU). They did not receive paid compensation for their time or services but may have received travel reimbursement.
- ✓ Volunteer Coordinator: Performed the SHIP coordinator functions without any compensation for their time and services (they may have received travel reimbursement).
- ✓ Other Volunteers: Performed other functions for the SHIP aside from the counselor and coordinator functions described above. Examples of other volunteer staff include volunteers who assisted with data entry, marketing or administrative duties, or served as receptionists, and trainers. These types of volunteer staff can work in the state office or at local/field sites.

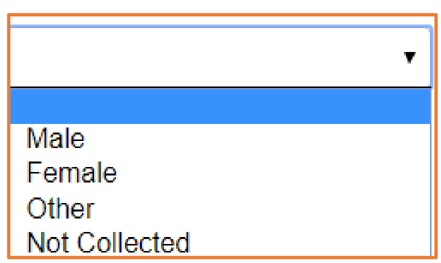
Demographics

- *Race:* Select all that apply. This list cannot be edited to include "Other," as many people have requested. Make the most appropriate selection/s from the available options. Use the scroll bar to the right of the dropdown list to see all options. Not pictured here are:
  - o White
  - o Not Collected

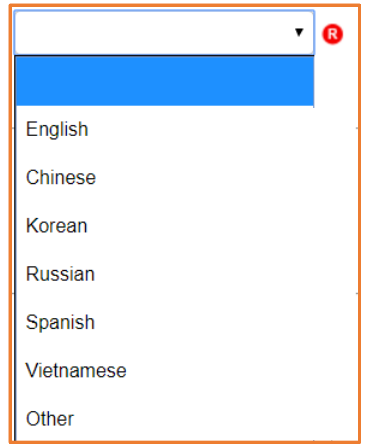


- *Date of Birth:* Enter the date manually or use the date selection tool. It may be easier to manually enter the birthdate rather than scrolling backward through the many months and years using the date selection tool.

- *Gender:* Not required. Options are:
  - o Male
  - o Female
  - o Other
  - o Not Collected



- *Primary Language:* Select one option. If "Other," explain in the Notes at the bottom of the form.



- *Secondary Language:* Complete only if applicable. The dropdown list is identical to the *Primary Language* list of options.

User Role and Credentials

In the final area of the Team member form, you establish the STARS user's role and complete associated role-based fields. Several important decisions are made in this area of the form.

- ***Role:*** The drop-down list (not pictured) is role-sensitive. For example, the list of options visible to a SHIP Director will be longer than the list of options available to a Site Manager.
  - A thorough description of user roles was provided earlier in this chapter. A copy of your STARS Hierarchy and the STARS User Role Overview handout will also be helpful.
- ***Send Login Credentials*:** Credentials include a username and password, which are required for logging into STARS. Team members who will not be logging into STARS, do not need credentials.
  - Team member needs to log into STARS to enter data? Select **Yes.**

  - Team member will not be entering data into STARS or accessing STARS for any reason? Select **No.**

  - **NOTE (!):** Login credentials are sent to the user's email address in STARS. An email address is required in STARS if you select *Yes* to Send Login credentials.

Sample Credentials Emails

Here are sample emails associated with sending credentials.

Sample Username email:

Sending address: Donotreplyaclsystems@micropact.com
Subject line: STARS Credentials Username

Welcome to STARS!

You've been registered as a user of the SHIP Tracking and Reporting System (STARS). Included below is your **username** to log into STARS allowing you to add new interactions and update interactions you have already submitted.

The **password** to accompany this username will be sent in a follow-up email. If you do not receive an email containing your temporary STARS password, please contact your administrator or the Booz Allen STARS Help Desk.

Username (case sensitive)**:** Helen.Troy

If you have any questions, please contact your administrator or the Booz Allen STARS Help Desk.

Have a great day!

Sample Password email (Possibility A): Received when credentials are sent when a team member is initially created.

Sending address: Donotreplyaclsystems@micropact.com
Subject line: STARS Credentials Follow-up

Welcome to STARS!
Below is your password to access the SHIP Tracking and Reporting System (STARS). You should have received your username in a separate email.

Please use the provided link to log into STARS with the password provided below, then create your own password:http://hhs-aclsmp-qa.entellitrak.com/etk-hhs-aclsmp-qa/myAccount.update.password.request.do

Password (case sensitive): Xxx$1111

If you have any questions, please contact your administrator or the Booz Allen STARS Help Desk.

Have a great day!

Sample Password Email (Possibility B): If you create a team member but do not send the credentials until a later date, they will receive this email.

Sending address: Donotreplyaclsystems@micropact.com
Subject line: STARS Credentials Follow-up

Welcome to STARS!

You've been registered as a user of the SHIP Tracking and Reporting System (STARS). You should have received your username in a separate email.

Please click here to use the password reset tool to create a temporary system password.

After logging into the system with your **temporary password**, you can change your **temporary password** to a **personal password** by clicking here.

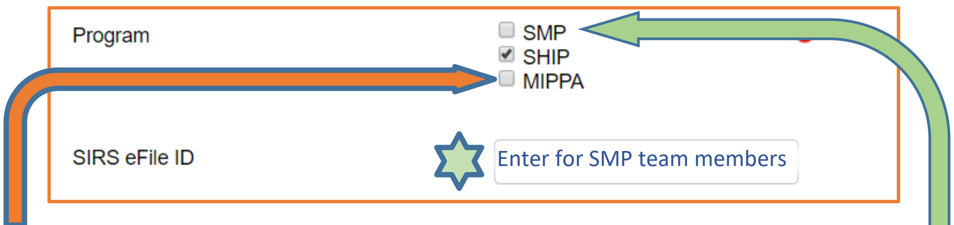
If you have any questions, please contact your administrator or the [Booz Allen STARS Help Desk](#).

Have a great day!

Program

In this area of the team member form, you will indicate whether the SHIP team member is also co-trained to conduct work for the Senior Medicare Patrol (SMP) program and/or the Medicare Improvements for Patients and Providers Act (MIPPA) program. In STARS, *SHIP* is indicated by default. Add additional check marks, as appropriate. Please review Chapter 1, the Introduction to this manual, for more information about the programs that work with STARS.

- **(!)** ***Program (R):*** Three are listed, and the system selects SHIP by default.



  - **(!) If this team member does MIPPA work, click MIPPA also**, or this team member's efforts will not count toward the MIPPA report;
  - **(!)** If you unclick SHIP, this team member's efforts will not count toward any SHIP reports; leave SHIP checked (unless the team member is MIPPA only).

(!) If this team member does SMP work, click SMP also and enter the team member's SIRS eFile ID. SIRS is the **S**MP **I**nformation and **R**eporting **S**ystem.

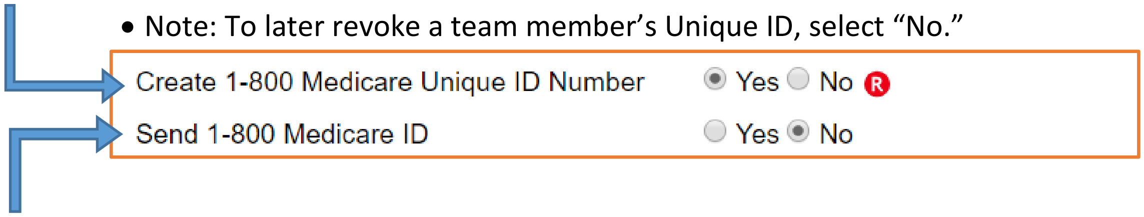
Unique ID Creation

The STARS Team Member form refers to the CMS Unique ID as a "1-800-Medicare Unique ID number." The Unique ID system is available to SHIPs and SMPs through a collaboration between ACL and CMS. The system is designed to remove barriers to researching beneficiaries' complex Medicare issues. CMS Unique IDs are used by active, approved, screened, and trained SHIP and SMP team members as a form of verification to provide access to certain beneficiary information when assisting a Medicare beneficiary. The CMS Unique ID can also be used for speaking with representatives from Medicare Advantage and Part D plans who have agreed to participate in the CMS Unique ID program and the Benefits Coordination & Recovery Center (BCRC) for CMS. See the CMS Unique ID job aid for more details about this system. It is in the SHIP Resource Library (log in at www.shiptacenter.org).

STARS Processes: Director or Assistant Director Users

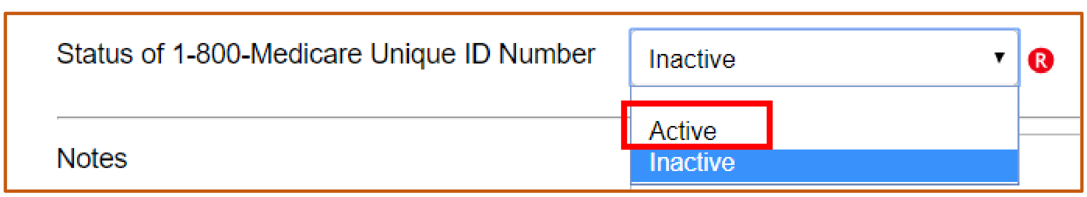
In STARS, creation and management of the Unique ID fields is limited to the SHIP Director and SHIP Assistant Director roles. If you hold one of those user roles, follow the steps below for team members who need Unique IDs.

1. **Create 1-800 Medicare Unique ID Number.** The default answer to *Create 1-800 Medicare Unique ID Number* is "No." When creating or updating a team member profile, SHIP Directors or SHIP Assistant Directors should select "Yes" if the team member is to be given a CMS Unique ID.
    - Note: To later revoke a team member's Unique ID, select "No."



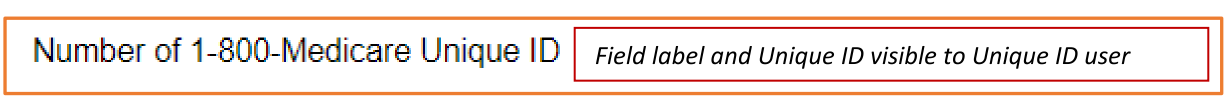
2. **Send to 1-800 Medicare ID.** "Sending" means to email the team member their Unique ID from the STARS system. It is not a required field. Select "Yes" to have STARS send the team member their Unique ID in an email. This is only possible if the team member profile contains an accurate email address. The sending address of the email will be donotreplyACLsystems@micropact.com. This field will always revert to "No" after saving.
    a. To resend ID multiple times: Upon saving, the *Send 1-800 Medicare ID* field reverts to "No," even if you had selected "Yes." This allows you to send the Unique ID an unlimited number of times, if needed. Each time you select "Yes" and re-save, the automatic email will send.
    b. Note: You can also use the Unique ID report to obtain a list of CMS Unique IDs, and you can use that report to provide your team members with their Unique ID using another method of your choosing. Team members can also see their own Unique ID number on their own Team Member form.

3. **Status of 1-800-Medicare Unique ID Number.** This required field reads *Inactive* by default. If this team member will be assigned a Unique ID, click the drop down arrow and select *Active*.



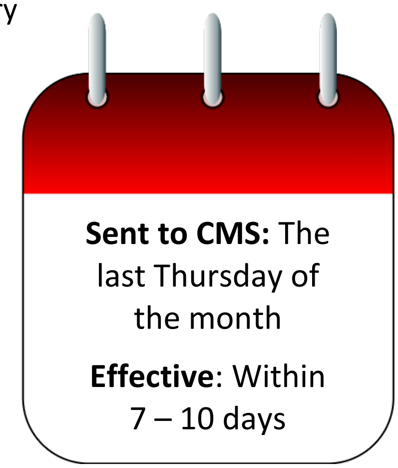
    a. Note: Unique IDs can be inactivated by changing the status to "Inactive." You will find more details about how STARS inactivation rules may apply to the Unique ID in the section of this chapter about retiring and inactivating team members and in Chapter 2 of this manual.

4. **Number of 1-800-Medicare Unique ID.** After saving, a Unique ID number will auto-generate. It will be visible to that team member when that team member is viewing their own team member form and to SHIP directors and SHIP assistant directors.



    a. Note: SHIP directors and SHIP assistant directors can also see Unique ID numbers on the Unique ID report (Configuration menu).

Unique ID Effective Date



ACL sends CMS an updated CMS Unique ID list on the last Thursday of every month. It takes CMS 7 -10 days to process the monthly CMS Unique ID file. CMS Unique IDs that are active in STARS before the last Thursday of the month will be usable within the first 7 - 10 days of the following month. Unique IDs approved on or after the last Thursday of the month will be usable the second month following their approval.

A revoked (i.e. inactivated) CMS Unique ID will remain usable until the next ACL-generated CMS Unique ID list is processed by CMS. Inactivation of IDs follows the same schedule as newly activated IDs. Therefore, any CMS Unique IDs that have been inactivated will *not be* on the ACL-generated list sent to CMS. Consequently, they will *no longer be usable* after CMS processes the new list. CMS Unique IDs that become inactivated on or after the last Thursday of the month will remain usable until the second month following inactivation.

If a Unique ID is inactivated during a month but is reactivated *before* ACL generates the monthly list for CMS, there will be no interruption in a counselor's ability to use their CMS Unique ID.

120 Days of Inactivity and Unique IDs

120 days of team member inactivity will lead to automatic inactivation of the CMS Unique ID, once this STARS functionality has been activated by ACL (expected sometime in 2019). CMS Unique ID Inactivity is defined as one of the following:

1) Team member has not logged into STARS for 120 days; OR
2) No beneficiary contact forms or Beneficiary Additional Session forms have been linked to the team member via any STARS *Session Conducted By* fields for 120 days.

Inactivated Unique IDs must be reactivated by a SHIP director or SHIP administrator user of STARS. Reactivate ID by updating the team member's Status of Unique ID to "Active." More details about the STARS inactivity rules are provided in Chapter 2 – User Basics.

Unique ID Deadlines, Resources, and Other Instructions

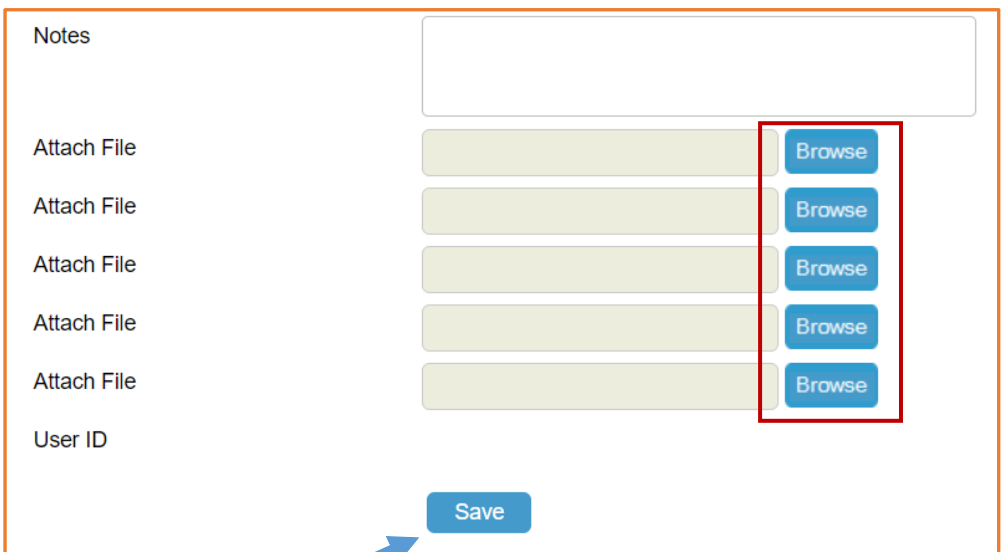
Under the Unique ID system, SHIP Directors or their designees approve Unique IDs for SHIP counselors who have *first* completed a confidentiality statement and who have been trained to be entrusted with private information related to the beneficiaries they counsel. The Unique ID number is automatically generated by the STARS system, and ACL gives CMS the list of Unique ID numbers.

There is a CMS Unique ID job aid for SHIP directors and assistant directors and a separate CMS Unique ID job aid for team members who use the Unique ID. Please refer to those job aids for details about how the CMS Unique ID program operates, including deadlines, available resources, and instructions for using the Unique ID when helping SHIP clients. Those job aids are in the SHIP Resource Library at www.shiptacenter.org.

Notes and Attaching Files

The final section of the Team Member form contains an optional Notes section and the ability to upload files. Enter notes, if applicable. The number of characters allowed is nearly infinite. The *Attach File* function is also optional. ACL does not require you to attach files to the Team Member form; however, state, regional, or local SHIP offices may decide to upload certain types of files routinely. Check with your supervisor, if you are uncertain.

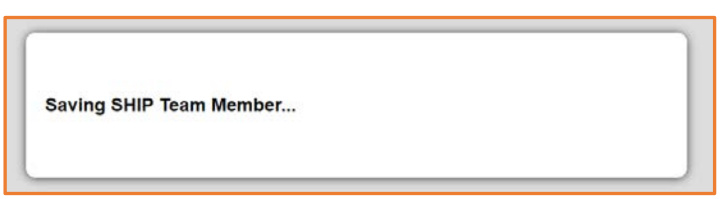
The *Attach File* function works just like email software: Click “Browse” to select the file you wish to attach from your computer. You can attach up to 5 individual files. STARS is liberal about the allowed file types.



Save Your Entry

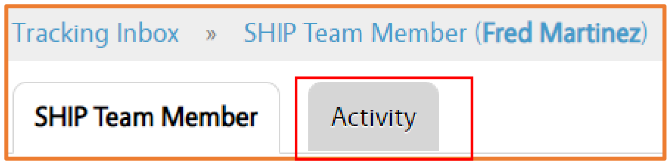
The Save button is blue, but it turns red when touched by your mouse: 

The prompt below alerts you that STARS is saving your team member. It may disappear very quickly, based upon the speed of your browser.

When the 

prompt disappears,

your work is saved. You will land on the page depicting your newly entered team member, and the *Activity* tab will appear for the first time. It only appears on a saved Team Member form.



Activity Form

As mentioned in the User Basics chapter, the *Activity* tab associated with each saved team member profile in STARS is how you access the Activity Form in STARS. It allows team members to enter their own time spent on activities not captured on the other STARS forms, and it allows users with access to others' team member forms to enter that time on their behalf, if desired

ACL Guidance and Definitions

SHIP Team members may split their time performing counseling, outreach, and other activities. The *Activity Form* is used to report Team member activity hours in minutes that have not already been reported on the Beneficiary Contact, Group Outreach and Education Contact, and Media Outreach and Education Contact forms. Activity Form options include Administrative Support, Program Management, and Other. **Hours entered on this Activity Form count in the Resource Report.** Pending for a future release is a new Training Form for capturing team member training hours. Meanwhile, enter training time under "Other SHIP Activities" on the Activity Form.

It is important that minutes/hours are not reported more than once each month. For example, if a team member is designated to work 20 hours per week on the SHIP program and spends 12 hours per week counseling or conducting outreach activities and spends the remaining 8 hours performing data entry, the time spent on administrative support activities will be reported as follows on the Activity form:

- Administrative Support for a four-week month: enter 1,920 minutes
    - The math: 8 hours (per week) x 60 minutes (per hour) x 4 weeks (month)

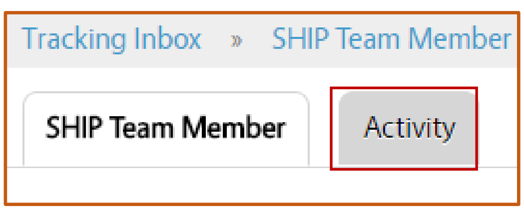
Field	Definition
Administrative Support	SHIP or MIPPA administrative activities performed by active state, local and field SHIP-paid, in-kind paid, and volunteer team members. Activities may include, but are not limited to: • Providing data entry, copying, filing, mailing; and • Other paid or in-kind agency staff who help to manage day to day operations such as receptionists, accountants managing grant dollars, and Executive Directors managing overall agency functions, etc.

Program Management/Team member Management	Program and Team member management activities are generally conducted by state, local and field SHIP-paid, in-kind paid, and volunteer Coordinators who may also be known as Program Directors, Sub-state Managers, or Site Managers. Activities may include: • Providing staff and volunteer recruitment, retention, and supervision; • Overseeing, preparing, and analyzing data reports; • Scheduling meeting and trainings; and • Providing travel reimbursements to volunteers, etc.
Other SHIP Activities	Other SHIP or MIPPA activities performed by active state, local and field SHIP-paid, in-kind paid, and volunteer team members. Activities may include, but are not limited to, • Activities related to orientation and training, until training form is made available in STARS; • Mentoring volunteers; • Brochure distribution; • SHIP or MIPPA marketing, informational, and educational materials that are publicized, disseminated and distributed to partner organizations and other local community sites, includes travel to deliver the information, etc.; and • Team member travel to outreach and training events

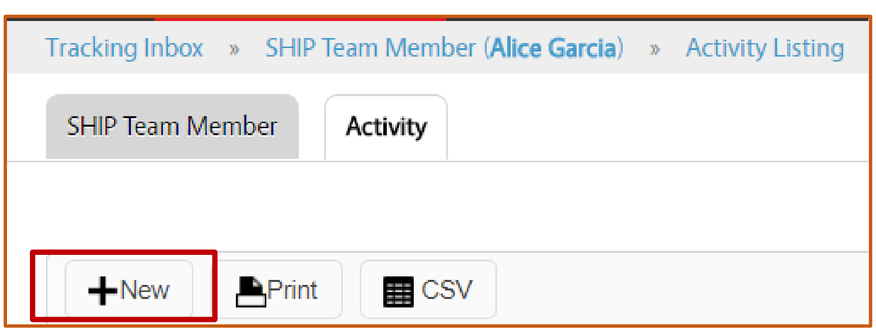
Data Entry Instructions

After you have opened any saved team member form, you will see the completed team member details and an *Activity* tab:

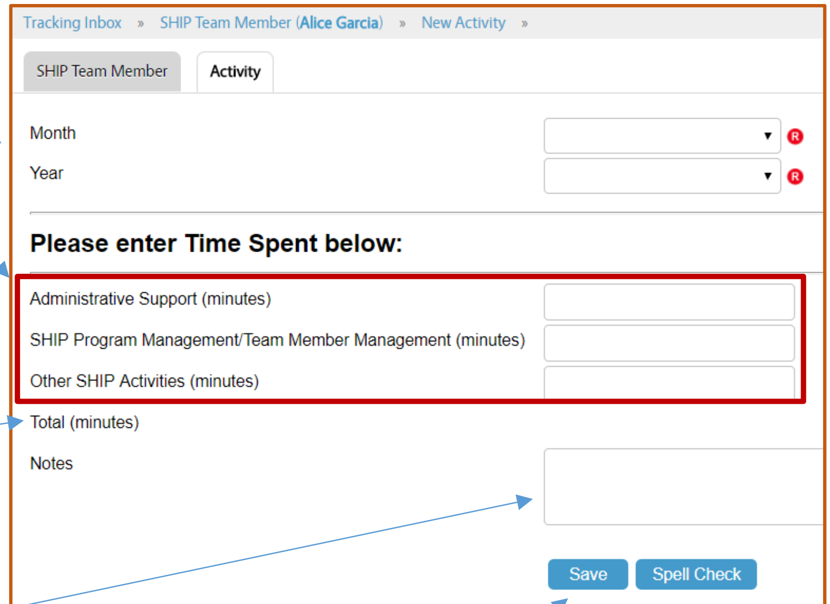
1. Click on the *Activity* tab to see the available fields.



2. You will see a list of previous activities, if there are any, and the "New" button. Click "New" to enter an *Activity.*



3. This is the form associated with additional team member activities:
    a. “Month” and “Year” are required fields.
    b. Enter time spent in minutes in one or more of the spaces provided.
    c. Minutes from all three types of listed activities total automatically.
    d. You can explain the type of activity in more detail (particularly “Other”) using the “Notes” field.



    e. Don’t forget to save your work by clicking the blue *Save* button.

Edit Team Members

All STARS users who can create team members can also update (edit) those team members. Login to STARS and select *Tracking Inbox* from the menu. All team members you created are visible. If your role allows you to see or update team members created by others, you will need to use the Search tool to find them. See the STARS Search chapter of this manual or the STARS Search job aid for detailed instructions.

Find Team Members You Created in the Tracking Inbox

You can find team members you created in your tracking inbox. You can find other team members visible to your role using the STARS search tool. These instructions focus on the tracking inbox. See the STARS Searches job aid for instructions about how to find team members entered by others.

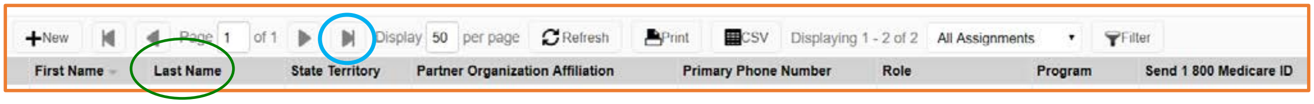
The column headers of your team member Tracking Inbox are sortable upon a click. They sort in ascending order upon one click. Click again, and they sort in descending order (and so on). A row of search tools are also available to you. The more team members you have entered, the more useful they may be.

Tips to Finding Team Members

Tracking Inbox: Lists you and any team members you created. It is unique to you.

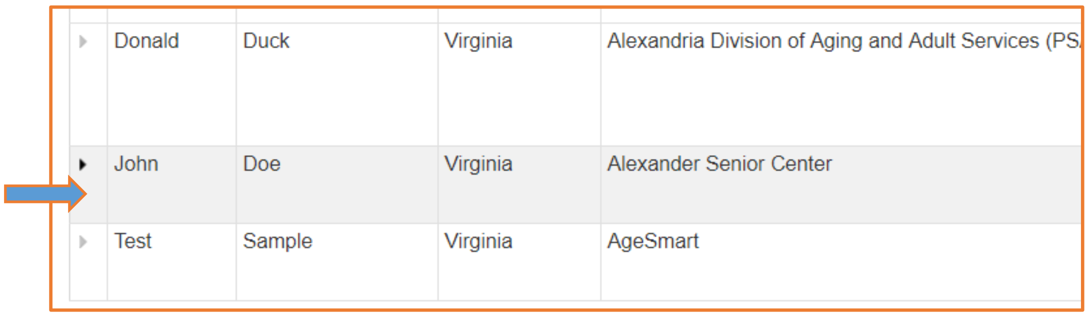
Search menu: If your role allows you to view or update team members created by others, you will need to use the Search tool to find them.

For example, you could click on the “Last Name” column header (circled in green) to sort alphabetically by last name. You could then click the arrow pointing right to scroll from page to page (circled in blue). You can also change the number of records displayed at one time. In the example below, 50 records display at a time.



Open the Saved Team Member Form

When you find your desired team member, clicking anywhere within their row of information opens their record. In the example to the right, our mouse has hovered over John Doe’s record, and it became gray. Upon click, John Doe’s team member form will open.



Editing the Team Member Form

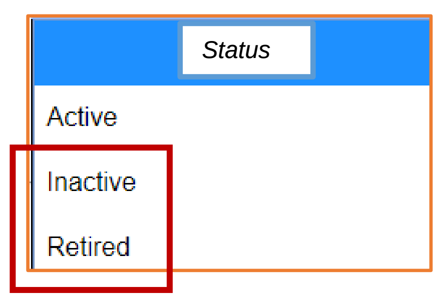
Use the same process for editing a team member form as you used for [entering a team member](). Any field that can be entered by a user can be edited by a user. When you are done, click Save. A prompt will confirm your edits are being saved.

Editing User Names

Editing the First Name or Last Name field will **not** result in a change to that team members User Name. Contact the STARS Help Desk at Booz Allen Hamilton for assistance if a change to the User Name is requested.

Program Status: Retire, Inactivate, or Delete

The status of a team member who is not currently active with your SHIP program can be nuanced. First, we explain the *Inactive* and *Retired* options in the *Status* file in greater depth. You need to understand system inactivity rules, the consequences of system inactivity rules, and the importance of revoking logins for team members who are not “Active.”



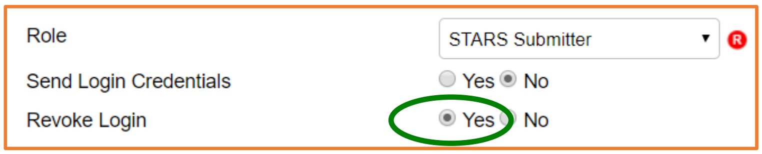
Retired Status

We recommend selecting "Retired" as the Status if the team member is no longer with the SHIP program, are not coming back, and will not be accessing STARS in the future. When a team member retires, remember to revoke their login (shown later).

Inactive Status and 120 Days of Inactivity Rules

A team member is considered inactive when the program *Status* field reads "Inactive." This can be set manually; however, STARS has been built to automatically inactivate accounts – sometimes including the Unique ID status - when system inactivity criteria have been met. Re-activation of team member program status and Unique ID status must be done manually. STARS inactivity rules were covered in-depth in Chapter 2 – User Basics.

Revoke Login

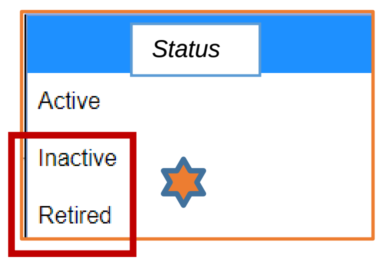


When anyone with STARS access leaves your program, their access should be immediately disabled by revoking their login. This applies to team members who are both "Inactive" or "Retired." Select "Yes" for *Revoke Login*.

Should You Delete a Member?

The answer is "usually not." However, one valid reason to delete a team member form is to remove duplicate team members. Each SHIP team member should only have ONE team member form. Duplicate team members will negatively impact the Resource Report.

Only SHIP Directors and SHIP Assistant Directors in STARS can delete a team member. The decision to delete a team member must be thought through carefully. Deletions will impact STARS forms assigned to that team member and STARS Reports.



Our best practice is for the team member to be made "Inactive" or "Retired" in the *Status* field, not deleted.

- ✓ **(!)** An exception is the when a team member has more than one STARS account. Duplicate accounts should be deleted after reassigning records, if applicable.
- ✓ **(!) Important:** SHIP Directors and SHIP Assistant Directors should ensure there are no records attached to a Team Member they wish to delete.

If you delete a team member form, records tied to that team member form must first be re-assigned to the appropriate team member, or the *Session Conducted By* field will be blank. Blank *Session Conducted By* fields will make the associated forms more difficult to find, and, lacking a named team member, the time spent on those forms will not populate the Resource Report.

To reassign records associated with a team member:

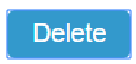
1. Identify the team member that must be deleted (usually a duplicate).

2. Conduct a Search for each of the main forms and their associated Additional Session/Team Member forms to identify forms associated with this team member.
    a. Tip: Set your criteria to seek *Session Conducted By* is "EQUAL TO" that team member.
    b. Tip: Add other search criteria, if desired. *Partner Organization Affiliation* can be a useful filter when addressing duplicate team members with accounts tied to separate Partner Organizations.
3. From the resulting matches:
    a. Open each form
    b. Select the appropriate different team member from the *Session Conducted By* drop down box
    c. Save your changes.

To delete a Team Member form

After you have reassigned all records associated with that team member (if there are any), do the following:

1. Find the Team Member's form using a Standard Search.
2. At the bottom of the form, click the blue *Delete* button.



3. It will turn red upon click and a message will ask you if you are sure you want to delete. Click *OK*.