

SHIP NPR User Manual

State Health Insurance Assistance Programs (SHIP)
National Performance Reporting (NPR)



Web site: <https://shipnpr.shiptalk.org>



If you cannot locate an answer to your question in the NPR User Manual, please contact the SHIP NPR Help Desk for assistance.

Toll-Free Help Desk: 1-800-253-7154, ext. 1

E-mail: SHIPNPRhelp@TechnicalFrontiers.com

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CHAPTER 1

OVERVIEW OF SHIP NPR: REGISTRATION, LOG IN, AND ACCOUNT MANAGEMENT

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Overview of SHIP and NPR

Through the State Health Insurance Assistance Program (SHIP), states receive Centers for Medicare & Medicaid Services (CMS) grants to provide free assistance, counseling, and information to Medicare beneficiaries and their families. Trained counselors at local counseling centers deliver assistance and outreach through one-on-one counseling, telephone interactions, public education programs and presentations, and media outreach. Through SHIPs, Medicare beneficiaries may receive personalized help and information on issues related to Medicare and Medicaid, including enrollment in Medicare prescription drug plans, Medicare Advantage options, long-term care insurance, claims and billing problems, public and health insurance benefit programs, Medicare preventive services and Medicare fraud and abuse.

State and local SHIPs submit data about their activities into the SHIP National Performance Reporting (NPR) system. The NPR system collects and organizes this data to generate reports that measure the performance of the state SHIPs. The following are important characteristics of the NPR data collection system:

- Is consistent across all states (has common data elements and definitions)
- Is flexible enough to meet federal, state and local-level reporting requirements
- Is rigorous enough to generate national SHIP performance measures
- Minimizes the burden placed on SHIP counselors and staff
- Results in user-friendly data extraction and analysis processes for CMS

Data from all state and local SHIPs is combined to create a national NPR database. States may use the NPR database to generate summary reports based on data submitted from local and state agencies within their state. Similarly, local agencies may use the database to create summary reports based on data submitted within their agency.

The NPR database can also generate reports that examine national and individual state SHIP performance through the following data:

- Total clients contacts entered and number of individuals reached
- Types of beneficiaries served (age, ethnicity, income, etc.)
- Intensity of counseling
- Capacity to provide counseling
- Access to and mechanisms for providing counseling services

NPR Data Sources

Three primary data sources comprise the NPR system:

- **Client Contact** data on interactions between SHIP counselors and Medicare or Medicaid beneficiaries, seniors, and individuals working on behalf of a client.
- **Public and Media (PAM)** activity data about a SHIP's activities in educating Medicare beneficiaries, or others working on their behalf about the Medicare program through public presentations or outreach to the media, as well as, a SHIP's efforts to raise awareness of the State Health Insurance Assistance Program.
- **Resource Report** data that reports the numbers of SHIP personnel in a specific state, including paid and volunteer personnel.

Due Dates for NPR Data Collection

SHIPs must submit client contact data and PAM activity data to the SHIP NPR website on a quarterly basis, or every 3 months. State SHIP offices must complete Resource Report forms annually.

3-Month Period

	Apr 1–Jun 30	Jul 1–Sep 30	Oct 1–Dec 31	Jan 1–Mar 31
Client Contact Forms Due Date:	Jul 31	Oct 31	Jan 31	Apr 30
Public and Media (PAM) Activity Forms Due Date:	Jul 31	Oct 31	Jan 31	Apr 30

12-Month Period

	Apr 1–March 31
Resource Report Form Due Date:	May 31

Modes of NPR Data Entry

States may choose from two options for NPR data submission:

- **Web entry**

The web entry option allows individuals to directly enter Client Contact, PAM, and Resource Report data into forms on the SHIP NPR website. This system of entering forms online is also referred to as a non-proprietary data system.

- **Proprietary data system**

The proprietary data system option allows states and local agencies to use their own separate proprietary databases and client management systems to submit Client Contact and PAM data. These systems are typically developed by third parties, such as private vendors or other state agencies. States and agencies with proprietary data systems must upload Client Contact and PAM data files that are formatted according to NPR standards (specifications).

States with proprietary data systems are referred to as “proprietary data states.” However, many proprietary data states are actually “hybrid” states, where some SHIP agencies in the state upload data from their proprietary systems and other agencies enter records directly into the SHIPtalk NPR website. This user guide addresses data entry using the SHIP NPR website, not through proprietary systems.

Accessing the SHIP NPR Website

The NPR system is accessed through the SHIP NPR website. Individuals can log in to the website and report on their counseling services in Client Contact and Public and Media Activity forms, which can then be pulled into reports. The website also allows counselors to request Unique IDs. You must have an active SHIP NPR account in order to log in to the website. **The SHIP NPR website address is:** <https://shipnpr.shiptalk.org>.



There is no “www” in the SHIP NPR website address. If you use “www” in the website address, you will receive an error page that suggests you go to <https://shipnpr.shiptalk.org>.

Users often access the SHIP NPR website through their Internet’s “Favorites” list, and the link they saved may be outdated. It is helpful to enter the SHIP NPR website address directly into the web browser or to re-save the website in your “Favorites” list. Ensuring that you are on the SHIP NPR website is the first step to successfully logging into the NPR system.

Log in to the SHIP NPR Website

In an Internet window, go to <https://shipnpr.shiptalk.org>. If you already have a SHIP NPR account, enter your e-mail address and password into the corresponding boxes on the left side of the screen. Remember to use your full e-mail address (e.g., JohnDoe@gmail.com). If you do not remember your password or do not know it, you can easily reset your password by following the instructions in [Reset Your Password](#). Once you successfully enter your e-mail address and password and click on the “Go” button, a message will appear that explains you are entering a government website. Read the terms and click “I Agree” to log in.

What if You Do Not Have a SHIP NPR Account?

If you do not have a SHIP NPR account, follow the instructions in [Register Yourself for a SHIP NPR Account](#) to request an account. Administrators (e.g., agency or state administrators, SHIP Directors) can also register new users by following the instructions in [Register a User for a SHIP NPR Account](#).

What if Someone Else Registered You?

Often, administrators will register other users that work in their jurisdiction. These users will receive notifications by e-mail that they were registered for a SHIP NPR account and will also receive notification once their registration is approved. At this point, the user can go to the SHIP NPR website and log in with his or her e-mail address as described above. If the user does not know his or her password because someone else has set-up the account, the user can still reset the account password using the instructions below.

Reset Your Password (if you forgot your password or do not know it)

The SHIP NPR website allows a user to reset his or her password prior to log in. For security reasons, the SHIP NPR Help Desk staff cannot look up a user’s password. Therefore, any time a user forgets his or her password, it must be reset. A user does not need to know his or her password in order to reset it.

Instructions to Reset Your Password

1. Go to the SHIP NPR website (<https://shipnpr.shiptalk.org>).
2. Click on the “Forgot password?” link at the left of the page, next to “Go”. You may also click on the “Reset Password” button, which is also located on the left side of the page.
3. Enter and re-enter your e-mail address into the boxes in the center of the page as prompted. Enter the validation text that appears in the black box into the text box underneath it and click “Submit.” If the text you entered does not match the validation text on the page, you will be prompted to re-enter it and click “Submit” again.
4. You should see the following message: [Thank You! Your request has been submitted. If the email address you entered is in our system you will receive an email shortly. If you do not receive an email after a while, please verify that you entered the registered email associated with your SHIP NPR account. Please check your Junk mail folder as well. If you have additional questions, please contact the SHIP NPR Help Desk at 1-800-253-7154, option 1.](#)
5. You will receive an e-mail from the SHIP NPR Help Desk. If the message is not in your inbox, you may need to check your spam or junk e-mail folders. Open the e-mail and click on the link provided in the e-mail. The link directs you back to a page on the SHIP NPR website where you can reset your password.

Some users may get an error message when they click on the link in the e-mail to reset their password. There are multiple reasons this may occur:



- First, the link could be outdated. The password reset link stays active for only 24 hours. If it has been more than 24 hours since you received the password reset e-mail, you will have to repeat steps 1-5.
- Second, you may have already clicked on the link at an earlier date or time. The link is only valid for one-time use. If you clicked on the link at an earlier date or time, you will have to repeat steps 1-5.
- Third, the link may be broken. If you repeat steps 1-5 and you receive an error message for the second time, contact the SHIP NPR Help Desk at SHIPNPRHelp@TechnicalFrontiers.com or (800) 253-7154 ext. 1.

6. You will now have to create a new password. Your password must meet the following security requirements:
 - a. Your password must be between 8 and 30 characters.
 - b. Your password must contain at least one uppercase (capital) letter (e.g., A, B, etc.).
 - c. Your password must contain at least one digit (e.g., 1, 2, 3, etc.).
 - d. Your password must contain at least one special character. Special characters can be a punctuation mark or any other symbol on your keyboard (e.g., @ ! \$ % * ? +, etc.).
 - e. Your password cannot include any actual words (referred to as “dictionary words”). For example, you may not use the word “book” in your password, but you may use “b00k” instead (using zeroes instead of the letter “o”). Certain common names may also be considered words, so please keep this in mind when creating your password.

7. Enter your new password into the corresponding boxes in the middle of the page and click “Submit”. If the password you selected does not meet the security criteria, a message in red will notify you that your password does not meet the minimum requirements. Create a different password that meets all the security requirements. Enter the new password into the boxes and click “Submit.”
8. You should see a message that your password has been successfully reset. You will receive an email notification from the Help Desk confirming that you made changes to your account.
9. You may click on the link titled “Click here to login” or go to <https://shipnpr.shiptalk.org> to return to the SHIP NPR homepage and log in to the website.
10. Log in to the website using your full e-mail address and your new password.

For additional information about creating a password, please review Chapter 6 of the NPR User Manual, titled “Password Reset Instructions and Tips.”

User Registration

You must have a valid SHIP NPR account in order to view information on the SHIP NPR website and submit NPR forms such as the Client Contact, Public and Media Activity, or Resource Report forms. If you do not have an account, you may register for one yourself or be registered by an administrator. To create a new SHIP NPR account for yourself, refer to the instructions in [Register Yourself for a SHIP NPR Account](#). If you are an administrator and wish to create a new account for someone else, refer to the instructions in [Register a User for a SHIP NPR Account](#).

Note: Before completing a registration form for yourself, ask an administrator (e.g., your agency director) whether you need to register for a SHIP NPR account or whether they already created an account for you. If someone created an account for you, refer to [What if Someone Else Registered You](#) for instructions on logging in.

Register Yourself for a SHIP NPR Account

Individuals (e.g., counselors) can register for a SHIP NPR account by going to the SHIP NPR home page (<https://shipnpr.shiptalk.org>) and clicking the “Register” button at the top right of the screen. **Use the instructions in [Fill out a User Registration Form](#) to complete the registration form.**

Fill Out a User Registration Form

An item marked with an * indicates a required field.

Role (REQUIRED) – Please select one of the following roles from the drop down list.

The User Role defines the level of access an individual has in the SHIP NPR website. **Please read the descriptions below carefully to select the appropriate user role. It is important that you choose your user role carefully. In most instances, your user role cannot be modified once your account is approved.** The User Role field and the Task Functions and Access Authorizations field (a separate field on the registration form that is explained later) help determine the actions an individual can perform in the website. After selecting the appropriate user role, you **must** also select the appropriate task functions and access authorizations in order to have the level of access that is described for each user role.

Agency User – This role is for agency staff and volunteers. Agency users can submit NPR forms and view NPR forms they submitted.

If you select this role, a “State” dropdown box will display. Click on the dropdown box and select your state. When a state is selected, an “Agency” dropdown box will display. Click on the dropdown box and select your agency from the list.

Agency Administrator – This role is for individuals, such as agency directors, who work at a local agency and supervise staff. Agency administrators are authorized to view and submit NPR data for their agency, can be assigned as supervisors for other agency staff, and may be able to approve or deny user accounts.

If you select this role, a “State” dropdown box will display. Click on the dropdown box and select your state. When a state is selected, an “Agency” dropdown box will display. Click on the dropdown box and select your agency from the list.

Sub-State Regional User – This role is for individuals who work in a sub-state regional office. Sub-state regional users are authorized to view or submit data for their sub-state regional agency, but they cannot view or submit NPR data for other agencies or counselors within their sub-state region.

If you select this role, a “State” dropdown box will display. Click on the dropdown box and select your state. When a state is selected, a “Sub-State Region” dropdown box will display. Click on the dropdown box and select your sub-state region from the list. If no options display in the “Sub-State Region” dropdown box, your state has not created any sub-state regions and you will be unable to register using this role.

Sub-State Regional Administrator – This role is for individuals who supervise a sub-state region within a state. These individuals may monitor the work of multiple agencies within a particular geographic area of a state. Sub-state regional administrators are authorized view and submit NPR data, and run reports for the individual agencies within their sub-state region and for the individual counselors and data submitters within those agencies. This role also allows them to view and edit the profiles of SHIP NPR users within their sub-state region. It does not allow them to run reports for their entire sub-state region as a whole. Those reports can only be run by state administrators.

If you select this role, a “State” dropdown box will display. Click on the dropdown box and select your state. When a state is selected, a “Sub-state Region” dropdown box will display. Click on the dropdown box and select your sub-state region from the list. If no options display in the “Sub-State Region” dropdown box, your state has not created any sub-state regions and you will be unable to register using this role.

State User – This role is for individuals who are part of the state SHIP office and who submit NPR data for the state SHIP office only. Individuals with this role cannot submit or view NPR data for other agencies within the state. They also cannot perform administrative functions, such as adding, approving or editing user accounts.

If you select this role, a “State” dropdown box will display. Click on the dropdown box and select your state.

State Administrator – This role is for individuals who work for the state SHIP office and who assist in administrative functions. It includes SHIP Directors, as well as, other staff who assist the SHIP Director in monitoring account registration requests and running NPR reports. It is also for people who perform batch uploads in states and agencies with proprietary data systems. State administrators are authorized to submit and view NPR data for all agencies and users within their state. They can also view and edit the profiles of SHIP NPR users within their state.

Note: To register as a SHIP Director, first select the “State Administrator” role. Check the box that says, “Check this box if State SHIP Director”. There can only be one individual designated as the SHIP Director for each state. In addition to the permissions of a state administrator, a SHIP Director is also able to delete NPR forms and approve, revoke or reinstate Unique IDs.

If you select this role, a “State” dropdown box will display. Click on the dropdown box and select your state.

CMS Regional User – This role is for individuals who work at a CMS Regional office. CMS regional users are authorized to view NPR data for all the states and agencies within their region. **Do not select this role unless you work for a CMS Regional office.**

CMS User – This role is for individuals who work within the CMS Central office. This role allows an individual to view NPR data from all states and agencies. **Do not select this role unless you work for the CMS Central office.**

Name (REQUIRED)

Enter your first and last name into the corresponding boxes.

Primary E-mail (REQUIRED)

The e-mail address you enter here will be the e-mail address you use to access the SHIP NPR website. You must enter a valid e-mail address into this field. You can use an e-mail address that is affiliated with your agency or a personal e-mail address.



A single e-mail address cannot be shared among multiple SHIP NPR accounts. Therefore, multiple users at an agency cannot each register for an account if they share one e-mail address among them. Each individual must register using their own separate email account. If they do not have separate email accounts through their agency, they can create free personal email accounts, e.g., via Gmail, Yahoo, Hotmail, or other such websites.

Secondary E-mail

You may choose to enter a secondary e-mail address. This is not a required field.

Password (REQUIRED)

Create a password for the account. Your password must meet the following security requirements:

- a. Your password must be between 8 and 30 characters.
- b. Your password must contain at least one uppercase (capital) letter (e.g., A, B, etc.).
- c. Your password must contain at least one digit (e.g., 1, 2, 3, etc.).
- d. Your password must contain at least one special character. Special characters can be a punctuation mark or any other symbol on your keyboard (e.g., @ ! \$ % * ? +, etc.).
- e. Your password cannot include any actual words (referred to as “dictionary words”). For example, you may not use the word “book” in your password, but you may use “b00k” instead (using zeroes instead of the letter “o”). Certain common names may also be considered words, so please keep this in mind when creating your password.

Re-type your password in the box labeled “Confirm Password”. If you forget your password after your account is approved, you can reset it at any time by following the instructions in [Reset Your Password](#). You will not need to log in to the website to change your password.

If you are filling out a registration form for another individual, select a password for that individual. Once that individual’s account is approved, he or she can reset the password by following the instructions in [Reset Your Password](#). The individual will not need to know the password you selected to be able to change the password.

Primary Phone (REQUIRED)

Enter your primary phone number using the 123–456–7890 ext. 123 format.

Secondary Phone

You may choose to specify an alternate phone number (e.g., cell phone). This is not a required field.

Task Functions and Access Authorizations (Select all that apply)

The type of functions and authorizations that a user is assigned determines what types of NPR data that user can view and submit. If you are unsure what authorizations apply to you, please ask an administrator (e.g., your agency director). You may also leave these blank since they can be modified by an administrator once your registration is approved. Select all that apply.

Counselor – This permission authorizes users to enter Client Contact forms for themselves. However, counselors cannot enter forms for other counselors at their agency unless they also are designated as “data submitters” (see below). Select this option if you plan to submit your own Client Contact forms.

Data Submitter – This permission authorizes users to enter forms for other counselors at their agency. Select this option if you will submit Client Contact forms for other counselors at your agency. Remember to also select the “Counselor” permission if you will submit your own Client Contact forms as well.

Public and Media Staff – This permission authorizes users to submit PAM forms for either themselves or other users at their agency. This box must be selected if an individual will attend PAM events. Select this option if you will submit PAM forms or attend PAM events.

Data Editor / Reviewer – This permission authorizes individuals to view and edit NPR forms submitted by counselors or submitters whom they supervise, but does not allow them to submit NPR forms themselves. Data editors/reviewers can only view and edit the forms of counselors or data submitters for whom they were designated as a supervisor when those counselors’ or data submitters’ accounts were created. An administrator can assign users to supervisors. Select this option if you will review NPR data submitted by users that you supervise.

Other Staff (NPR read only) – This permission authorizes users to view NPR data, but does not allow them to submit or edit NPR forms. An agency user or administrator with this authorization can view NPR data for their agency only, but cannot submit or edit NPR forms for the agency. A state user or administrator with this level of permissions can view NPR data for agencies within their state and run NPR reports, but cannot submit or edit NPR forms for agencies within their state. Select this option if you will review NPR data submitted by users at your level (e.g., agency, state) but will not submit NPR data yourself.

Other Staff (SHIP read only) – This permission prevents users from viewing NPR data, but allows them to see other SHIP-related information on the website. Since the website (<https://shipnpr.shiptalk.org>) does not contain information materials, e.g., the information library and SHIP navigator, from the old SHIPtalk website, you do not need to use this authorization at the current time.

Is Approver? (For Administrators only)

If you are an administrator who logged in to your SHIP NPR account to fill out a registration form for another user, you will see a field titled “Is Approver?” **If you select this option for the user, the user will be authorized to approve or deny SHIP NPR registrations.** This may be necessary for state administrators and some agency administrators who assist the SHIP Director or agency director in managing user accounts. **If you are not sure about whether to select this option, do not select it.** If necessary, an administrator can always modify a user’s account to add this option once the account is approved.

Is Super Editor? (For Administrators only)

If you are an administrator who logged in to your SHIP NPR account to fill out a registration form for another user, you will see a field titled “Is Super Editor?” All counselors/administrators have the ability to view/edit the forms they entered into NPR. However, **if you select this “super editor” option for the user, the user will be authorized to view and edit NPR forms for other individuals who have the same or lesser level of access.** An agency user who has super editor permissions is authorized to view and edit NPR forms for all other agency users at that agency. An agency administrator who is a super editor is able to view and edit NPR forms for all other agency administrators at that agency. The same conditions apply to individuals at the state and sub-state level who are assigned super editor permissions. Because super editors can modify other users’ NPR forms, please assign this permission cautiously. **If you are not sure about whether to select this option, do not select it.** If necessary, an administrator can always modify a user’s account to add this option once the account is approved.

Validation Text

Above the “Register” button, there will be a black box that contains white text. If you are an administrator who logged in to your SHIP NPR account to fill out a registration form for another user, you will not see this box and can proceed to the next step.

Enter the letters and numbers as they appear into the box labeled “Enter the text from the image or sound above”. If you have trouble reading the text in the box, there are two small buttons located to the right of the box to assist you. To hear the text spelled out for you, click on the top button that looks like a speakerphone. To generate a new set of letters and numbers, click on the bottom button that has two arrows forming a circle.

Submit Registration Form

Click the “Register” button to submit the registration form. A message displays stating that your registration form was submitted. If you do not see this message, your form was not submitted correctly. If the form contains any errors, an error message will display in red above the corresponding fields. Fix the errors and click the “Register” button to resubmit the form.

E-mail Address Verification Process

Once you submit the registration form, you will receive an e-mail from the SHIP NPR Help Desk that asks you to click on a link in the e-mail to verify that your e-mail address is correct.

Note: If you are an administrator who logged in to your SHIP NPR account to complete a registration form for another individual, the e-mail address verification will be sent directly to the individual you registered. Refer to [For Administrators: Manage User Accounts](#) for instructions on how to review, approve, or deny a user registration.

If you registered yourself and do not receive the e-mail in your inbox, check your spam or junk e-mail folders. The content of the message will be similar to the following:

Dear [Your name],
Thank you for registering at shipnpr.shiptalk.org.
Follow this link to verify your e-mail address and submit your registration for approval. If you have difficulties accessing the link, copy and paste the link below to your browser to verify your e-mail address.
<https://shipnpr.shiptalk.org/EmailConf.aspx?evt=shipnprhelp@air.org9fc-57c2->
You will receive an e-mail within a few days notifying you about the status of your registration request.

Click on the link in the e-mail to verify your e-mail address.

Note: Some users occasionally get an error message when they click on the link to verify their e-mail address. There are multiple reasons this may occur. First, the link could be outdated. The e-mail verification link stays active for only 24 hours. If it has been more than 24 hours since you received the e-mail verification e-mail, ask your administrator to resend the e-mail verification to you. Second, you may have already validated your e-mail address at an earlier date or time and your account may already be active. Try logging on to the SHIP NPR website with your e-mail address and password. If you are unable to log in (e.g., your password does not work or you receive a message that your account is pending), click on the “Forgot password” link to reset your password. If your account is active, you will be able to reset your password and then log on.

Account Approval Process

Once your e-mail address is verified, your registration is eligible for approval by an administrator. You will receive an e-mail that informs you when your SHIP NPR account is approved. If your account is approved, the message will say the following:

Dear [Your name],
Your request to shipnpr.shiptalk.org account has been approved.
You may log in anytime using your registered information.
If you do not know your new SHIPtalk password, you can reset it by going to <https://shipnpr.shiptalk.org> and clicking 'Forgot password?' in the left of the screen.
Follow the instructions to have the password reset instructions e-mailed to you. Once you reset your password, you should be able to log in to the website with your e-mail address and new password.

Once your account is approved, you can log in to the SHIP NPR website. Refer to the section, [Log in to the SHIPtalk NPR Website](#) for instructions on logging in.

Note: If your account is not approved, you will receive an e-mail saying that your account was denied. If you have questions about why this occurred, contact your agency director or other administrator who denied the registration.

Overview of Functions on the SHIP NPR Website

After you log in to the website, the home page will remain the same, but new tabs will appear on the top of the screen along with a welcome message on the left side of the screen. These buttons include “Agency,” “User,” “Edit My Profile,” “RR,” “CC,” “PAM,” “Upload,” “SHIP Profile,” “NPR Reports,” and “Logout.” Details for each tab are described below. All users can see these tabs but only users with specific permissions can see all functions under each tab.

Agency

This section of the website allows administrators to search for an agency by using keywords (excluding) in the agency’s name. The list will also include details such as

- Type of agency (local agency, referral telephone line)
- Address
- Telephone number and hours (if available)

Administrators can click on “View” for additional details including active counties, service areas, contact information for the agency director, and the website URL. Additionally, administrators are also given options to “View” or “Edit” an Agency’s information, as well as the options to “Add an Agency” or “Add a Sub-State Region.” The links for “View” or “Edit” an Agency’s information will be next to each Agency’s name in the list, while the “Add an agency” or “Add a Sub-State Region” links are located on the right side of the screen. As mentioned earlier, only specific administrators will have the permissions to carry out these functions.

User

All users are able to access this section of the website. However, users can only search for other users with lower level permissions. For example, counselors may only be able to search for their own names, while administrators may be able to search for counselors within their offices. Some administrators can also click on the following links on the “User” screen:

- **User List:** View a list of users within the administrator’s agency or state (depending on permissions)
- **Add a New User:** Create accounts for new users, in lieu of registering users through the “Register” tab on the home page
- **Review, Approve, Deny Users:** Review, approve or deny pending account requests (refer to [Review, Approve, or Deny a User Registration](#))
- **Review, Approve, Deny, Revoke CMS SHIP Unique ID Requests:** Refer to the section on [Unique IDs](#).
- **Download Approved CMS SHIP Unique IDs:** Refer to the section on [Unique IDs](#).

Edit My Profile

All users will be able to view the information under this page. This page lists a profile for each user including the user’s role, role description, contact information, and the zip and county of counseling location. Refer to the section titled [For All SHIP NPR Users: Manage Your User Profile](#) for more information about the options on the user profile page. Some users will also have the option to request or view their CMS Unique ID located at the bottom of the page. Refer to the section on [Unique IDs](#) for additional details on the process for requesting a Unique ID.

RR

Only SHIP Directors and state administrators are able to access this tab to search and add Resource Reports.

CC

This tab allows users to enter Client Contact forms and look up a previously entered Client Contact form to edit or print it. Administrators can also add, edit, or delete a special use field on this page.

PAM

This tab allows users to enter Public and Media (PAM) forms and look up a previously entered PAM form to edit or print it. Administrators can also add a special field on this page.

Upload

Only administrators in proprietary data states and agencies can access this tab to upload, validate and process CC and PAM form data.

SHIP Profile

All users can use this tab to select a state and view a summary of their state's SHIP program and relevant contact information.

NPR Reports

This tab allows users to run reports for the CC and PAM forms they have completed. A user's ability to run reports depends on the user's role and authorizations. For more information, refer to "Role" in the section titled, [Fill Out a User Registration Form](#).

Logout

Users can click on this tab at any time to log out of their SHIP NPR account.

Managing SHIP NPR Accounts

For All SHIP NPR Users: Manage Your User Profile

Once your account is approved, you should edit your user profile to assign a ZIP code and county of counseling location, and to request a Unique ID if you require one. You can also modify your user profile at any time to update your name, phone number, or e-mail address. **In most instances you cannot modify your user role.**



If you no longer have access to your e-mail account and your SHIP NPR password has expired (preventing you from resetting your password) you may ask your agency administrator to change your e-mail address or contact the SHIP NPR Help Desk at 1-800-253-7154 ext. 1 or SHIPNPRhelp@TechnicalFrontiers.com.

Instructions to Edit Your User Profile

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the "Edit My Profile" tab at the top of the screen.
3. On the "My Profile" page, you will be able to edit your personal information such as your name, phone number, etc. Click "Submit" at the bottom of the page to save your changes. If you want to edit your e-mail address, follow the instructions below.

Edit Your E-mail Address

Use the “My profile” page to edit your Primary E-mail Address. The e-mail address you enter in the Primary E-mail Address field is the same e-mail address you use to sign into SHIP NPR.

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “Edit My Profile” tab at the top of the screen.
3. On the “My Profile” page, click on the “Edit My Email” link at the upper right hand side of the screen.
4. This directs you to the “Change your email” screen, which prompts you to enter your new e-mail address twice into the corresponding boxes. Your e-mail address cannot be associated with an existing SHIP NPR account. This means that a single e-mail address cannot be shared among multiple SHIP NPR accounts. Therefore, multiple users at an agency cannot each register for an account if they share one e-mail address among them. Each individual must register using his or her own separate email account.
5. Enter your new e-mail address into both boxes and click the “Submit” button. If the e-mail address is already in the SHIP NPR system, you will receive an error message that says, “The primary email address is already registered. Duplicates are not allowed.” If you receive this error message, you will need to use a different e-mail address (one that is not in the NPR system) and click “Submit”.
6. When you have successfully submitted a new email address, you will see a message explaining that your request has been submitted.
7. You will receive an e-mail notification at your NEW e-mail address (check your spam or junk folders if the e-mail is not in your inbox). Click on the word “Accept” in the e-mail to confirm your new e-mail address. If clicking on “Accept” does not work, copy and paste the link included in the message into your browser’s address bar.
8. The link directs you to a screen with a message that states, “Thank You! You have successfully verified your email address. You can login using your new email anytime.”

Some users may get an error message when they click on the link in the e-mail to reset their password. There are multiple reasons this may occur:



- First, the link could be outdated. The password reset link stays active for only 24 hours. If it has been more than 24 hours since you received the password reset e-mail, you will have to repeat steps 1-5.
- Second, you may have already clicked on the link at an earlier date or time. The link is only valid for one-time use. If you clicked on the link at an earlier date or time, you will have to repeat steps 1-5.
- Third, the link may be broken. If you repeat steps 1-4 and you receive an error message for the second time, contact the SHIP NPR Help Desk at SHIPNPRHelp@TechnicalFrontiers.com or (800) 253-7154 ext. 1.

Edit Your ZIP Code of Counseling Location

Use the “My profile” page to designate a “ZIP Code of Counseling Location”. The ZIP code you select will automatically appear as the default selection for the “ZIP Code of Counselor Location” field when you open a new Client Contact form. To designate a ZIP code, scroll down your profile page and use the dropdown to select the ZIP code of the counseling agency or location where you primarily provide services to beneficiaries. When you fill out the Client Contact form, you will always have the option to modify the ZIP code of the counseling location if it is different than your default selection (e.g., if you provide services in an off-site location).

Edit Your County of Counseling Location

Use the “My Profile” page to also designate a “County of Counseling Location”. The county you select will automatically appear as the default selection for the “County of Counselor Location” field when you open a new Client Contact form. To designate a county, scroll down your profile page and use the dropdown to select the county of the counseling agency or location where you primarily provide services to beneficiaries. When you fill out the Client Contact form, you will always have the option to modify the county of the counseling location if it is different than your default selection (e.g., if you provide services in an off-site location).

CMS SHIP Unique ID

For information about who should request a Unique ID and the approval process, refer to the section, [Unique IDs](#). It is important to read this section before you request a Unique ID.

For Administrators: Manage User Accounts

Administrators are responsible for managing user lists and user accounts. Depending on their role and level of permissions, administrators may be able to

- A. [View and/or Download the User List](#)
- B. [Register a User for a SHIP NPR Account](#)
- C. [Resend an E-mail Address Verification Link](#)
- D. [Review, Approve, or Deny a User Registration](#)
- E. [Edit a User Profile](#)
- F. [Delete a User Account](#)
- G. [Inactivate a User Account](#)
- H. [Add a User to Another Agency](#)
- I. [Remove a User From an Agency](#)
- J. [Assign a User to a Supervisor](#)

A. View and/or Download the User List

Administrators are able to view and download the list of SHIP NPR users within their jurisdiction. For example, state administrators can access the list of all SHIP NPR users within

their state. Sub-state administrators can access the list of all users within their sub-state region. Agency administrators can access the list of all users within their agency.

Note: The SHIP Director’s account information never appears in the user list. Only the SHIP Director can view his or her own account information.

Instructions for Administrators: View and/or Download the User List

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click on the “User List” link at the right of the screen.
4. You will see a list of users organized alphabetically by first name. You may use the page numbers at the bottom of the page to scroll through the list.
5. To download the user list to a Microsoft Excel document, click on the “Download User List” link at the right of the screen.

If a user is assigned a Unique ID, the Unique ID will display next to the user’s name in the user list. To learn more about Unique IDs, refer to [Unique IDs](#). The user list also displays each user’s NPR User ID, which is a distinct number that is assigned to each user’s account. Users do not need to know their NPR User ID to enter Client Contact or PAM forms. The NPR User ID is simply an identification number that the SHIP NPR website uses to store and organize a user’s forms and account information in its database.

You may click on a NPR User ID next to a user’s name to view that user’s account information. Another option to retrieve a user’s account information is to use the “Search Users” box within the “User” tab and search for the individual’s first and last name.

B. Register a User for a SHIP NPR Account

Some administrators choose to register users rather than asking the users to fill out registration forms themselves. Administrators may choose to do this to prevent users from registering incorrectly or because they prefer to manage and track the user registration process themselves.

Instructions for Administrators: Register a User for a SHIP NPR Account

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click the “Add a New User” link on the right.
4. Fill out the registration form using the instructions in [Fill Out a User Registration Form](#).
5. When you submit the registration form, the user will receive an e-mail that asks the user to verify his or her e-mail address by clicking on a link in the e-mail. When the user clicks on the link and verifies the e-mail address, the user’s account will immediately be activated. You will not need to approve the user’s SHIP NPR account in a separate step

like you must do when users register themselves. If the user deletes the message or does not click on the link within 24 hours, you will have to resend the e-mail verification message using the instructions in [Resend an E-mail Address Verification Link](#) below.

C. Resend an E-mail Address Verification Link

The e-mail verification link stays active for only 24 hours. If the user does not complete the verification within 24 hours, an administrator must resend the e-mail verification to the user.

Instructions for Administrators: Resend an E-mail Address Verification Link

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click the “Review, Approve, Deny Users” link on the right.
4. The “Pending User Registrations” screen displays the list of pending user registrations that are awaiting approval. Click on the “Show Pending E-mail Verifications” button at the right of the screen to display the list of pending e-mail verifications.
5. Find the desired individual’s name and click “Select” next to it. Scroll to the bottom of the page and click “Resend E-mail”.

D. Review, Approve, or Deny a User Registration

Administrators are responsible for reviewing new SHIP NPR registrations and deciding whether to approve them. When a user registers for a SHIP NPR account and completes the e-mail verification, an e-mail notification is sent automatically to the administrator responsible for approving the account. This may be a state, sub-state, or agency administrator, depending on who has the ability to approve user registrations. For example, in some states, a state administrator is responsible for reviewing and approving all user registrations within the state. In other states, each agency has an agency administrator that can review and approve user registrations for that agency.

Instructions for Administrators: Review, Approve, Deny a User Registration

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click on the link to “Review, Approve, Deny Users” on the right of the screen to see a list of pending registrations that are awaiting your approval. If you do not have the link, your account does not have the necessary level of permissions to approve user accounts. Only an administrator with a higher level of permissions than you can grant you this access.
4. Click “Select” next to the desired individual’s name to view their registration form.

5. Review the form to make sure all fields were correctly entered. Make sure the user selected the appropriate role, agency, and task functions and access authorizations.
6. Once you review their registration and decide whether to approve it, click on either “Approve” or “Deny” at the bottom of the page, depending on your desired action. A message stating that your action was successful will display at the top of the screen. If the account was approved, the message will state, “The user approval was successful. An approval notification e-mail has been sent to the user.” If the account was denied, the message will state, “You have denied account for the registered user. Please note that the registration information has been deleted. An e-mail confirmation has been sent to the user about your decision.”
7. The user will receive an e-mail that says whether the account was approved or denied. The user’s registration will no longer appear in the list of pending registrations for approval.

E. Edit a User Profile

Administrators (e.g., agency, sub-state or state administrators) can view and edit the profiles of users within their jurisdictions. For example, an agency administrator can view and edit the profiles of agency users within their own agency. State administrators can view and edit the profiles of users within the state. Administrators may need to edit user profiles for multiple reasons, such as to assign a user to a supervisor, to change the agency to which a user is assigned, to modify a user’s authorizations, to change a user’s e-mail address, or to inactivate or delete a user’s account. The following sections describe instances when administrators may edit a user’s profile and instructions for editing.

F. Delete a User Account

In certain situations, an administrator may need to delete a user’s account, e.g., if a user was registered incorrectly. An administrator can delete a user’s account if the user does not have any NPR data affiliated with their account. If a user’s account has affiliated NPR data (e.g., the user submitted NPR forms or another user submitted NPR forms on behalf of the user), the website will not allow the deletion. The website will also not delete a user’s account if the user has a Unique ID. Before the account can be deleted, the SHIP Director must first revoke the user’s Unique ID using the instructions in [Revoke a User’s Unique ID](#).

Instructions for Administrators: Delete a User Account

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Use the “Search Users” box to search for the user whose account you want to delete. You may search using their first and/or last name.
4. Click “Select” next to their name to view their user information.

5. Scroll down the page and click the “Delete” button. If this button is not visible, your account does not have the necessary level of permissions to edit user accounts. Only an administrator with a higher level of permissions than you can grant you this access.
6. In the “Confirm Delete” pop-up box that displays, click “Yes” to confirm that you wish to delete the user’s account.
7. A message will display indicating whether the account was deleted. If the user has NPR data affiliated with their account, you will receive a message stating that the account cannot be deleted because there is NPR data associated with the account. If this occurs, you will not be able to delete the user. In this situation, consider inactivating the user’s account instead, using the instructions in [Inactivate a User Account](#) below.

G. Inactivate a User Account

Occasionally, an administrator may need to inactivate a user’s SHIP NPR account. This need may arise, for example, if a user is no longer affiliated with SHIP or if a user was registered incorrectly but the user’s account cannot be deleted because there is NPR data affiliated with the account. When inactivating a user, remember that you must inactivate both, the user’s overall SHIP NPR account as well as the user’s access to the specific agency or agencies at which the user is active. Inactivating a user does not delete the user’s previously submitted NPR data.

Instructions for Administrators: Inactivate a User Account

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Use the “Search Users” box to search for the user whose account you want to inactivate. You may search using the user’s first and/or last name.
4. Click “Select” next to the user’s name to view the user’s profile information.
5. Click the “Edit” button located below the county of counseling location. If this button is not visible to you, your account does not have the necessary level of permissions to edit user accounts. Only an administrator with a higher level of permissions than you can grant you this access.
6. On the “Edit User Information” screen, change the “Login Account Status” to “Inactive”. This inactivates the user’s overall SHIP NPR account. Click “Submit” to save your change. The following message will display at the top of the screen: “Success! The submitted information has been saved successfully.”
7. To remove a user’s access to their agency, click the “Edit” link at the bottom right of the screen, near the agency information.
8. On the “Edit User Agency Profile” screen, uncheck the box next to “Grant Access to This Agency.”

9. Uncheck any items under “Task Functions and Access Authorizations”.
10. Click “Submit” to save your changes. A red box labeled “Inactive” will now display next to the agency’s name on the main user information page.

Note: Inactivating a user’s account does not automatically inactivate their Unique ID. You must revoke their Unique ID separately by following the instructions in [Revoke a User’s Unique ID](#).

H. Add a User to Another Agency

It is common for SHIP staff or volunteers to work at more than one agency within a state. In order for these users to be able to submit NPR forms for multiple agencies, their SHIP NPR accounts must be affiliated with all of the agencies for which they will report NPR data. **The users will not need to submit separate registration forms for each agency.** An administrator can edit the users’ accounts to add them to the appropriate agencies.

Instructions for Administrators: Add a User to Another Agency

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Use the “Search Users” box to search for the user whose account you want to inactivate. You may search using the user’s first and/or last name.
4. Click “Select” next to the user’s name to view the user’s profile information.
5. Click the “Edit” button located below the county of counseling location. If this button is not visible to you, your account does not have the necessary level of permissions to edit user accounts. Only an administrator with a higher level of permissions than you can perform this function or can grant you access to do so.
6. On the “Edit User Information” screen, click the link to “Add user to another agency” at the bottom right. This directs you to the “Add User Agency Profile” screen.
7. Use the dropdown list to select the name of the new agency.
8. Use the checkboxes to indicate whether the user is an agency administrator, can approve user registrations, or is a super editor. For more information on super editors, refer to the “Is Super Editor?” portion of [Fill Out a User Registration Form](#).
9. Select the task functions and access authorizations that the user will require at the new agency. For more information on any of the options listed on this screen, refer to the “Task Functions and Access Authorizations” portion of [Fill Out a User Registration Form](#).
10. Click “Submit” to save your changes. The following message will display: “Success! The submitted information has been saved successfully.”

11. You can verify that your changes were saved by clicking on the link to “Edit user profile main page” beneath the success message.
12. The new agency information will display at the bottom of the user’s profile.

I. Remove a User From an Agency

An administrator may need to remove a user from an agency, for example, if the user moved to a different agency or was initially registered with the incorrect agency. If a user was registered with the incorrect agency, first add the user to the correct agency using the instructions in [Add a User to Another Agency](#). Next, remove the user from the incorrect agency using the instructions below. Removing a user from an agency does not delete the user’s previously submitted NPR data for that agency.

Instructions for Administrators: Remove a User From an Agency

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab
3. Use the “Search Users” box to search for the user whose account you want to inactivate. You may search using the user’s first and/or last name.
4. Click “Select” next to their name to view the user’s profile information.
5. On the “User Information” screen, scroll down and locate the name of the agency from which you will remove the user. Click “Edit” next to the agency’s name to view the “Edit User Agency Profile” page.
6. Uncheck the “Grant Access to This Agency” box. This action ensures the user can no longer submit NPR forms for the agency.
7. Uncheck any selections under “Task Functions and Access Authorizations”. This action removes the user’s name from the counselor dropdown list in new Client Contact forms. Therefore, other counselors can no longer submit NPR forms on behalf of the user.
8. Click “Submit” to save your changes. The following message will display: “Success! The submitted information has been saved successfully.”

J. Assign a User to a Supervisor

The SHIP NPR website allows administrators to designate supervisors for individual users. For example, agency administrators can assign each user at their agency to a supervisor at that agency. Similarly, state administrators can assign each state user to a supervisor at the state-level. Supervisors can be given permission to review and edit NPR forms for the individuals they supervise.

Instructions for Administrators: Assign a User to a Supervisor

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab
3. Use the “Search Users” box to search for the user whose account you want to inactivate. You may search using the user’s first and/or last name.
4. Click “Select” next to the user’s name to view the user’s profile information.
5. On the “User Information” screen, scroll down and locate the name of the desired agency. Click “Edit” next to the agency’s name to view the “Edit User Agency Profile” page.
6. Use the “Supervisor” dropdown list to select a supervisor.
7. Click “Submit” to save your changes. The following message will display: “Success! The submitted information has been saved successfully.”

Unique IDs

Counselors interested in obtaining a Unique ID will need to (1) submit a request through the SHIP NPR website (<https://shipnpr.shiptalk.org>) and (2) should contact their state SHIP Director. The Unique ID is used for counselors to gain access to beneficiary information when calling the special CMS 1–800–Medicare number. Under the Unique ID system, SHIP Directors assign a Unique ID number to SHIP counselors who have completed a confidentiality statement and who have been trained to be entrusted with private information related to the beneficiaries they counsel.

Request a Unique ID

To request a new Unique ID, the user’s account must be authorized as a counselor. Data submitters, data editors and reviewers, and public and media staff are not authorized to have a Unique ID. For more information on access authorizations, refer to the section on “Task Functions and Access Authorizations” under [Fill Out a User Registration Form](#). Follow these instructions to request a Unique ID. The counselor must first log in to the SHIP NPR website (<https://shipnpr.shiptalk.org>) with his or her full e-mail address and password. Counselors can click “Forgot password” to reset their password if they have trouble remembering it. Once the counselor has successfully logged in to the SHIP NPR website, he or she can follow the steps below to request a Unique ID:

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>. If you have trouble logging in, refer to [Log In to the SHIP NPR Website](#). If you forgot your password or do not know it, refer to [Reset Your Password](#).
2. Once you are logged in, click the “Edit My Profile” button at the top of the page.

3. On your user profile, scroll down the page and click on the “Request Unique ID” button at the bottom of the page.
4. This request will be sent to your state SHIP Director for approval. The SHIP Director will have to approve each Unique ID before it is active.
5. You will be notified by e-mail on whether or not your request for a Unique ID has been approved or denied. During the period, when the request is pending review by the SHIP Director, you will see the message “Pending Approval” listed next to the “CMS SHIP Unique ID” option on your user profile page.
6. If the request is approved, you can log in to the SHIP NPR website and see your Unique ID on your profile page. Instead of the button for “Request Unique ID,” there will be a number listed. This is your Unique ID.

Note: Once your SHIP Director approves your Unique ID, your Unique ID number is immediately generated. Although you will now be able to see your Unique ID in your user profile page, this does not mean that the Unique ID is immediately available for use in calling the 1–800–Medicare number. There is a lag time for activation. Unique IDs are sent to CMS on the last Thursday of each month and should be activated and ready for use during the first week of the following month. If your Unique ID request is approved after the last Thursday of the month, you will have to wait until the end of the following month for CMS to receive your Unique ID.

Instructions for SHIP Directors: Manage Unique IDs

Only SHIP Directors can approve or deny Unique IDs. SHIP Directors will receive e-mail notifications when a user has requested a Unique ID. At this point, the SHIP Director can follow the directions below to take action for each user’s request. SHIP Directors can also revoke or reinstate a user’s Unique ID at any time.

View/Download the Unique ID List

SHIP Directors have the ability to view and download a list of the SHIP NPR users within their state that have a Unique ID. To do so, log in to the SHIP NPR website and click on the “User” tab. Click on the “Download Approved CMS SHIP Unique IDs” link at the right of the screen.

Review, Approve or Deny Unique ID Requests

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click on the link on the right side of the screen titled “Review, Approve, Deny, Revoke CMS SHIP Unique ID Requests.” This presents a list of all pending Unique ID requests in state.
4. Click “Select” next to the user’s name to view the “Generate CMS SHIP Unique ID for User” screen.

5. Scroll to the bottom of the page to see the buttons to approve or deny the Unique ID. Click the appropriate button. A success message will appear indicating that the action has been carried out successfully.
6. Click on the link titled “Back to Pending CMS SHIP Unique IDs” to go back to the list of pending requests. When all requests have been addressed, this screen will read “At this moment there are no pending Unique ID generation requests.”

Note: Users will receive e-mail notifications if a SHIP Director denies their request for a Unique ID. However, denial is not permanent. The “Request Unique ID” button will re-appear in the user’s profile page. At any point in the future, the user can re-request a Unique ID, although the SHIP Director can deny it again if appropriate.

Revoke a User’s Unique ID

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click on the link on the right side of the screen titled “Review, Approve, Deny, Revoke CMS SHIP Unique ID Requests.”
4. Click on the “Show all CMS Unique ID List” link on the right side of the screen. This directs you to the “CMS Unique IDs” page that displays a list of all Unique ID users, including both pending and approved Unique IDs.
5. Click “Select” next to the name of the user whose Unique ID you wish to revoke.
6. Scroll to the bottom of the page and click on the “Revoke CMS SHIP Unique ID” button.

Reinstate a User’s Unique ID

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “User” tab.
3. Click on the link on the right side of the screen titled “Review, Approve, Deny, Revoke CMS SHIP Unique ID Requests.”
4. Click on the “Show Revoked CMS Unique ID List” link on the right side of the screen. This shows you a list of users who’s Unique IDs were revoked.
5. Click “Select” next to the name of the user whose Unique ID you wish to reinstate.
6. Scroll to the bottom of the page and click on the “Reinstate CMS SHIP Unique ID” button.

CHAPTER 2

CLIENT CONTACT FORM

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Client Contact Form Overview

What is a client contact?

A client contact includes all contacts between a counselor or staff and a client, which may include Medicare or Medicaid beneficiaries, seniors, and their family members or others working on behalf of a client. Client contacts may be conducted over the telephone, in person (on site), in person (at home), or via postal mail, e-mail, or fax.

When should I fill out a Client Contact form?

A Client Contact or CC form must be completed or updated for each contact between a counselor/staff and a beneficiary or his/her representative. The Client Contact form is used by registered State Health Insurance Assistance Program (SHIP) counselors only. These individuals must have received counselor training and signed a Counselor Agreement or Memorandum of Understanding (MOU) with their local SHIP agency. SHIP counselors may include volunteers, agency staff, toll-free Help Desk counselors, and local coordinators/sponsors.



Client Contact forms are considered confidential and must be treated by counselors as confidential information. The counselor must assure the client that all personal information collected is confidential.

When shouldn't I fill out a Client Contact form?

Do not fill out Client Contact forms for:

- unsuccessful attempts to reach a client (e.g., leaving messages on an answering machine).
- individuals reached at public events such as presentations or health fairs, or for questions asked during or after a presentation.
- calls when the only purpose is to schedule an appointment with a SHIP counselor.

These are not considered individual contacts unless one-on-one counseling occurs.

Open a Client Contact Form

You must be logged in to the SHIPtalk NPR website (<https://shipnpr.shiptalk.org>) to enter a Client Contact form. The website is commonly referred to as the SHIP NPR website and will be referred to as such in this user guide.

Once you log in to the SHIP NPR website, click on the light blue “CC” button at the top of the screen. This directs you to the “Search Client Contacts” screen (see below).

Search Client Contacts

[Add a Contact for a New Client With No Prior Service at This Agency](#)
[Add a Special Field](#)
[List Recent Client Contacts](#)

Search Keywords:

Contact Date Range: From: To:

State:

Agency:

Counselor:

Submitter:

Client Name	State-Agency-Specific Client ID	Contact Date
Doe, John		03/01/2012

[View](#) | [Edit](#) | [New contact for this client](#)

1

This screen allows you to complete the following tasks:

- A. [Enter a Client Contact Form for a New Client](#)
- B. [Enter a Client Contact Form for a Returning Client](#)
- C. [Look up a Previously Entered Client Contact Form](#)
- D. [Edit a Previously Entered Client Contact Form](#)
- E. [View/Print a Previously Entered Client Contact form](#)
- F. [Add, Edit, or Delete a Special Use Field](#)

A. Enter a Client Contact Form for a New Client

Once you log in to the SHIP NPR website, click on the light blue “CC” button at the top of the screen. This directs you to the “Search Client Contacts” screen.

To enter a Client Contact form for a client who is new to your agency and has not previously received counseling services, click on the link titled “Add a Contact for a New Client With No Prior Service at This Agency.” This link is located on the upper right hand side of the webpage. You can also find this link on your homepage when you first log-in to the SHIP NPR website, beneath the welcome message.

Clicking on the link will direct you to a new Client Contact form if you are registered at only one agency. If you are registered at more than one agency, you will see a dropdown list containing the agencies and should select the name of the agency at which the client contact occurred. You will then be directed to a new Client Contact form.

If you cannot open a Client Contact form, your SHIP NPR account was not given the necessary level of permissions. To enter in a Client Contact form for counseling services you provided, your SHIP NPR account must be assigned “Counselor” permissions. To enter in Client Contact forms for other counselors at your agency, your account must be assigned “Data Submitter” permissions. Contact your agency director or administrator to request the necessary level of permissions.

B. Enter a Client Contact Form for a Returning Client

Once you log in to the SHIP NPR website, click on the light blue “CC” button at the top of the screen. This directs you to the “Search Client Contacts” screen.

If you previously submitted a Client Contact form for a client, that client was entered into the system and assigned a Client Identifier number. Each time you have additional contacts with this client, you will first locate the client’s name in the system and then fill out a new form for that client. There are two ways to locate a client within the system.

- **Recently entered forms:** If you recently entered in a form for the client, it will display at the bottom of the screen. You can also click on the “List Recent Client Contacts” link on the upper right hand side of the webpage. In the previous screenshot, John Doe is a recently entered record. Once you locate the name of the client, click on “New contact for this client” next to the record. This directs you to a new Client Contact form that already contains the demographic information for that client (e.g., name, age, race, income, ZIP, etc.). You will be able to add the details of the most recent contact and submit the form.
- **Client contact search:** If the client does not display in the list of your recently entered records, you can also search for your previously entered contacts using the search fields on this page. You **must** specify a date range when conducting a search. You can either enter in a range of dates (e.g. 09/01/2011 to 09/15/2011) or a specific date (e.g., 09/01/2011 to 09/01/2011). However, you **do not** need to use all other the search fields to look for a previously entered record. It is often easiest to search using the beneficiary’s last name if it was entered into the original record. Once you locate the name of the client

from the list, click on “New contact for this client” next to the record to fill out Client Contact form for that contact.

C. Look up a Previously Entered Client Contact Form

Once you log in to the SHIP NPR website, click on the light blue “CC” button at the top of the screen. This directs you to the “Search Client Contacts” screen.

There are two ways to locate a previously entered Client Contact form.

- **Recently entered forms:** If you recently entered in a form for the client, it will display at the bottom of the screen. You can also click on the “List Recent Client Contacts” link on the upper right hand side of the webpage. In the previous screenshot, John Doe is a recently entered record.
- **Client contact search:** If the client does not display in the list of your recently entered records, you can also search for your previously entered contacts using the search fields on this page. You **must** specify a date range when conducting a search. You can either enter in a range of dates (e.g. 09/01/2011 to 09/15/2011) or a specific date (09/01/2011 to 09/01/2011). However, you **do not** need to use all other the search fields to look for a previously entered record. It is often easiest to use the beneficiary’s last name if it was entered into the original record.

D. Edit a Previously Entered Client Contact Form

Occasionally, a counselor may need to edit a previously submitted Client Contact form. For example, if you have more than one session with a client within a particular date, you will need to add the information for the additional sessions to the initial form. You may also need to modify a record if you discover that something was incorrectly entered.

To edit a previously submitted Client Contact form, you will first have to locate the form using the instructions in [Look up a Previously Entered Client Contact Form](#). Once you locate the record, click “Edit” next to the record to be directed to the previously entered form. Once you make changes to this Client Contact form, scroll to the bottom of the page to click “Submit.” A message will appear at the top of the page that says “Success! This Client Contact has successfully been edited.”

E. View/Print a Previously Entered Client Contact Form

To view or print a previously submitted Client Contact form, you will first have to locate the form using the instructions in [Look up a Previously Entered Client Contact Form](#). Once you locate the record, click “View” next to the record to be directed to a printer-friendly version of the previously entered form.

F. Add, Edit, or Delete a Special Use Field

Only SHIP Directors and other state administrators can add a Special Use Field (SUF) to the Client Contact form.

Instructions for Administrators: Add a Special Use Field

1. Once you log in to the SHIP NPR website, click on the light blue “CC” button at the top of the page. This directs you to the “Search Client Contacts” screen.
2. Click on the link to “Add a Special Field,” located on the upper right hand side of the screen.
3. Before adding a SUF, use the search filter to check what SUFs were already defined for your state on the Client Contact form. Use the calendar option to enter a wide date range (e.g., multiple years) to be sure that you see all existing SUFs. You can also manually enter the dates using the MM/DD/YYYY format. Click “Search”. The results will display below. If there are no existing SUFs for the date range, a message will appear at the top of the screen that says, “No special fields could be found”.
4. Click “Add” to add a SUF to the Client Contact form.

Name. In the name field, enter text that describes the field and its coding. For example, a field titled “Homebound Y N” would use a “Yes” or “No” response to indicate whether a client is homebound. The name you select for the field will display on the online Client Contact form, so be sure to use a name that counselors will understand and remember.

Start and end dates. Use the calendar options to select start and end dates for the field. The start date is the first calendar date when the SUF will be displayed on your state’s Client Contact form (for proprietary data states, the start date is the first calendar date that batch upload records will accept values into this SUF). The end date is when you expect the SUF to retire. Enter a date that is sufficiently far along in the future. You can modify the end date at any time if necessary.

Description. This field explains the documentation used in the SUF. For example, for fields that use a “Yes” or “No” response, the description can say “Y=Yes N=No”.

Validation type. There are three options for this field. Select “AlphaNumeric” if users are expected to enter text (e.g., Y or N) or some combination of text and numbers. Select “Numeric” if users are expected to enter number codes (e.g., 1, 2, 3, or \$200). Select “None” if there are no restrictions to what users can enter in this field.

Is required. Indicate whether this is a required field for your state.

Field type. This field is pre-populated to display “State” since this the SUF applies to the entire state.

Form type. This field is pre-populated to display “Client Contact” since the SUF is for the Client Contact form.

5. Click “Save” to save the SUF.

6. A message will appear that says “The special field was created and assigned available ordinal value [a number between 11 and 20]”. The number assigned to the SUF will depend on the number of existing state SUFs. Values 1 through 10 are reserved for National SUFs.
7. You can view the SUF by opening a new Client Contact form using the instructions in [Enter a Client Contact Form for a New Client](#). Scroll to the bottom of the blank form. The SUF should display at the bottom of the form.

Instructions for Administrators: Edit or Delete a Special Use Field

1. Once you log in to the SHIP NPR website, click on the light blue “CC” button at the top of the page. This directs you to the “Search Client Contacts” screen.
2. Click on the link to “Add a Special Field,” located on the upper right hand side of the screen.
3. Use the search option to locate the SUF. Select a wide date range (e.g., multiple years) to be sure that you see all existing SUFs. You can also manually enter the dates using the MM/DD/YYYY format. Click “Search”. The results will display below.
4. Locate the SUF you wish to modify and click on either the “Edit” or “Delete” link next to it, depending on your intended action. If making edits to the SUF, click “Save” once your edits are complete.

Fill Out a Client Contact Form

An item marked with an * indicates a required field.

Add Client Contact

(Items marked in * indicate required fields.)

*** Client Identifier**

Client Identifier Used by Your Agency or State: Use Agency or State Identifier

Client Identifier Auto-Assigned by NPR: 3903672571146 Use Auto-Assigned Identifier

Client Name and Contact Information

Client First Name: Representative First Name:

Client Last Name: Representative Last Name:

Client Phone Number:

Client ZIP Code and County

* ZIP Code of Client Residence:

County of Client Residence:

Counselor and Agency

* Counselor:

* Agency:

* County of Counselor Location: * ZIP Code of Counselor Location:

* Date Of Contact:

Client Identifier (REQUIRED)

The Client Identifier is a unique number that is assigned to each client at an agency. It will serve to link together all forms for a single client so a counselor can reference them in the future if necessary. The client identifier field also allows for a better count of the number of individuals served at the agency level. Using a client identifier makes it possible to correctly link all contacts a single client has with a particular agency. It also allows for an accurate count of the total number of contacts per unique client and the total amount of time spent per unique client.

- ***Client Identifier Used by Your Agency or State:* Read the following instructions before selecting this option.** Some states and agencies use a unique client numbering system in a separate case management database or spreadsheet that contains client names, addresses, phone numbers, date of birth, and other personally identifiable information (PII). If your agency uses its own unique client numbering system, click the button next to this option and enter the client identifier into the box. If you select this option, the auto-assigned client identifier will still display beneath the client identifier you enter into the box.



- **Do not** enter anything into this field if your agency does not use its own client numbering system. Refer to the following page for additional instructions. Ask your agency coordinator or supervisor if you do not know if your agency has its own client numbering system.
- **Do not** enter your Unique ID or Agency name into this field.



The client identifier is a unique number so each identifier can only be used with one client. Do not try to assign the same client identifier to multiple clients. If you still have questions about this field, please contact your agency administrator or the SHIP NPR Help Desk at SHIPNPRHelp@TechnicalFrontiers.com or (800) 253-7154 ext. 1.

- ***Client identifier auto-assigned by NPR:*** If your state or agency does not use their own client identifiers, select this option. This is the default option and most states and agencies will use this option.

Client Name and Contact Information

All the fields in this section are optional and are **not** used by Centers for Medicare & Medicaid Services (CMS) or American Institutes for Research (AIR), the SHIP NPR contractor in analysis or reporting. These fields are included since some states and agencies use NPR as a case management tool and record beneficiary names and contact information to make it easier to retrieve an existing client record. For example, a counselor may need to look up a previously entered Client Contact form to update it or add a new record for an existing client.

Client First and Last Name

If your agency *does* collect beneficiary names, enter the first and last name into the corresponding boxes. If your agency *does not* collect beneficiary names, leave the boxes blank.

If you are counseling a couple who needs assistance with the same issue(s) or with separate issues, a separate form must be completed for each individual.

Client Phone Number

Enter the beneficiary's phone number and area code by typing in only the numbers. The phone number will automatically format itself. If you do not collect a complete telephone number, you may enter the area code only. You can also leave this field blank, if desired.

Representative First and Last Name

If appropriate, enter the name of the individual (e.g., spouse, relative, friend, agency staff) who is helping or representing the beneficiary.

ZIP Code of Client Residence (REQUIRED)

Enter the five-number ZIP code of the beneficiary's residence in the box provided. This field is separate from the ZIP code of the counseling location and does not have to be the same as the ZIP code recorded for the counseling location. Make sure to enter a valid five-number ZIP code and do not use placeholders such as 12345, since this is a valid ZIP code.

The ZIP Code of Client Residence is needed for SHIPs to document services provided to low-income individuals in the Low-Income Subsidy (LIS) targeted beneficiary ZIP codes. ZIP Code of Client Residence is also useful for analyzing service penetration, assessing service coverage, and calculating distances between service agencies and beneficiary residences.

County of Client Residence

The Client County of Residence is an optional data element. It is *highly recommended* that you collect and record it. If you enter a valid client ZIP code of client residence, the dropdown list will automatically generate county suggestion(s). Select the correct county from the dropdown list.

Counselor (REQUIRED)

Use the dropdown list to select the name of the counselor who conducted the client contact. Select your name if you are entering in a contact that you completed. If you are entering in a contact completed by another counselor in your agency, select the name of that counselor.

What if your name is not in the counselor dropdown list?

If your name is not in the counselor dropdown list, you were not designated as a "Counselor" when your account was created. Notify your agency administrator or a regional or state administrator (e.g. your state SHIP Director or their staff), who should be able to edit your account to designate you as a counselor. Once the "Counselor" designation is added to your account, your name should be in the dropdown list when you open a new Client Contact form.

What if you need to enter in forms for other counselors but cannot see their names in the dropdown?

If you can only see your name in the counselor dropdown list and cannot see the names of other counselors at your agency, you do not have the level of permissions necessary to enter data for other counselors at your agency. It means that when your account was created, you

were designated as a “Counselor” (this allows you to enter in your own forms) but were not designated as a “Data Submitter” (this would allow you to enter in forms for other counselors at your agency). Notify your agency administrator or a regional or state administrator (e.g. your state SHIP Director or their staff), who should be able to edit your account to designate you as a data submitter. Once the “Data Submitter” designation is added to your account, you will see the names of other counselors in your agency in the counselor dropdown list when you open a new Client Contact form.

What if you are an administrator and need to change a user’s level of permissions?

Instructions for Administrators: Change a User’s Level of Permissions

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>
2. Click on the “User” tab.
3. In the search box, enter the name of the user whose account you wish to modify, and click “Search.” The search result should display below.
4. Click “Select” to view the user’s profile information. Scroll all the way down the screen to see the name of the agency at which the user is registered.
5. Click the “Edit” link at the lower right, near the agency information, to edit the user’s agency profile. Do not click the “Edit” *button* located below the county of counseling location. If a user is registered at multiple agencies, make sure to click the “Edit” link that corresponds to the agency at which the user’s permissions must be changed. If the user is registered at multiple agencies and the user’s permissions must be changed for some or all of the agencies, you will have to repeat steps 5-7 for each of the agencies on this page.
6. On the user’s agency profile screen, look at the “Task Functions and Access Authorizations” and make sure the appropriate boxes are selected (i.e., the box next to the selection is checked).
 - a. **Counselor** permission authorizes users to enter Client Contact forms for themselves. However, counselors cannot enter forms for other counselors at their agency unless they also are designated as “Data Submitters” (see below). Select this option if you plan to submit your own Client Contact forms.
 - b. **Data Submitter** permission authorizes users to enter forms for other counselors at their agency. Select this option if you will submit Client Contact forms for other counselors at your agency. Remember to also select the “Counselor” permission if you will submit your own Client Contact forms as well.
 - c. **Public and Media Staff** permission authorizes users to submit PAM forms for either themselves or other users at their agency. This box must be selected if an individual will attend PAM events. Select this option if you will submit PAM forms or attend PAM events.
 - d. **Data Editor/Reviewer** permission authorizes individuals to view and edit NPR forms submitted by counselors or submitters whom they supervise, but does not allow them to submit NPR forms themselves. Data editors/reviewers can only view and edit the forms of counselors or data submitters for whom they were designated as a supervisor

- when those counselors' or data submitters' accounts were created. An administrator can assign users to supervisors. Select this option if you will review NPR data submitted by users that you supervise.
- e. **Other Staff (NPR Read Only)** permission authorizes users to view NPR data, but does not allow them to submit or edit NPR forms. An agency user or administrator with this authorization can view NPR data for their agency only, but cannot submit or edit NPR forms for the agency. A state user or administrator with this level of permissions can view NPR data for agencies within their state and run NPR reports, but cannot submit or edit NPR forms for agencies within their state. Select this option if you will review NPR data submitted by users at your level (e.g., agency, state) but will not submit NPR data yourself.
 - f. **Other Staff (SHIP Read Only)** permission prevents users from viewing NPR data, but allows them to see other SHIP-related information on the website. Since the present SHIP NPR website (<https://shipnpr.shiptalk.org>) does not contain information materials from the old SHIPtalk website (e.g., information library, SHIP navigator), you do not need to use this authorization at the current time.
7. Once you have made the necessary edits to the user's agency profile, click "Submit" to save your changes. You will see a "Success" message at the top of the page notifying you that the submitted information was saved successfully.

Agency

This field will be pre-populated based on the agency at which you are registered. If you are registered at multiple agencies, you will be asked to select an agency when you open the new Client Contact form. Make sure to select the agency at which the client contact was completed.



If the agency on the form is incorrect or if you belong to multiple agencies but do not have the option of selecting the correct agency, notify your agency administrator or a regional or state administrator (e.g. your state SHIP Director or their staff), who should be able to edit your account to grant you access to the correct agency or agencies using the instructions below.

Instructions for Administrators: Change a User's Agency

1. Log in to <https://shipnpr.shiptalk.org>. Click on the "User" button and use the "Search Users" box to look up the user. Click "Select" to view the main user information screen.
2. Scroll to the bottom of the page to see the agencies where the user is registered.
3. If the user is registered at the wrong agency, select "Edit" next to the incorrect agency's name to edit the user's agency profile for that agency.
4. Uncheck the box next to "Grant Access to This Agency".
5. Uncheck any items selected under "Task Functions and Access Authorizations".
6. Click "Submit" to save your changes. There will now be a red box titled "Inactive" next to the agency's name on the main user information page.

7. To add the user to another agency, go to the main user information screen and click the “Edit” button (underneath “County of Counseling Location”). This directs you to the “Edit User Information” screen.
8. Scroll down the page and click the link to “Add User to Another Agency”. Select the appropriate user rights and functions and click “Submit” to save your changes. The new agency should now display as active at the bottom of the main user information page.

County of Counselor Location (REQUIRED)

This field will pre-populate based on the name of the counselor for whom you are completing the form. However, you can use the dropdown to change the county if the pre-populated selection is incorrect or the counselor’s location has changed.

The county of counselor location is usually the county of the SHIP office or call center but also could be the county of an off-site assistance event at another location (e.g., a mall, another agency). If you are providing services in a beneficiary’s home or nursing home, use the county name of that location as the county of the counselor location. In short, the counselor county is where the counselor was at the time the counseling occurred.

ZIP Code of Counselor Location (REQUIRED)

This field will pre-populate based on the county of counselor location. However, you can use the dropdown to change the ZIP code if the pre-populated selection is incorrect.

The counseling ZIP is usually the ZIP code of the SHIP office or call center, but could also be the ZIP code of a special off-site assistance event at another location (e.g., a mall, another agency). If you are providing services in a beneficiary’s home or nursing home, use the ZIP code of that location as the ZIP of the counselor location. In short, the counselor ZIP code is where the counselor was at the time the counseling occurred.



If you are the counselor and notice that your county is incorrect, it could be because your profile contains the incorrect default ZIP code. You can change your default ZIP code by clicking on “Edit My Profile” and selecting the desired ZIP in the “ZIP Code of Counseling Location” dropdown box. Click “Submit” to save your change.

Date of Contact (REQUIRED)

Enter the date on which the counseling assistance session occurred. You may enter the date using the MM/DD/YYYY format or click on the calendar icon next to the box to select the date.

- Do not count contact with a client to merely set up an appointment for a later date.
- Leading zeros are required when entering the date (e.g. enter January 1, 2011 as 01/01/2011).



A single counselor cannot submit multiple forms for the same client for the same date of contact. If more than one session with the client occurs at your agency on the same day, they are considered as the same contact, and should not be counted as a multiple contact. If you have a second session with a client on the same date and have already entered in a form for the client (after the first session), you will need to look up the previously entered form and edit it to add the additional time spent and topics discussed in the second session. To do this, follow the instructions in [Look up a Previously Entered Client Contact Form](#). If two or more separate counselors see the same client on the same day, each counselor should complete a separate form for the contact.

<p>* First vs Continuing Contact:</p> <p><input type="radio"/> First Contact for Issue</p> <p><input type="radio"/> Continuing Contacts for Issue</p>	<p>* How Did Client Learn About SHIP:</p> <p><input type="radio"/> Previous Contact</p> <p><input type="radio"/> CMS / Medicare</p> <p><input type="radio"/> Presentations</p> <p><input type="radio"/> Mailings</p> <p><input type="radio"/> Another Agency</p> <p><input type="radio"/> Friend or Relative</p> <p><input type="radio"/> Media</p> <p><input type="radio"/> State Website</p> <p><input type="radio"/> Other</p> <p><input type="radio"/> Not Collected</p>	
<p>* Method of Contact:</p> <p><input type="radio"/> Phone Call</p> <p><input type="radio"/> Face to Face at Counseling Location or Event Site</p> <p><input type="radio"/> Face to Face at Client's Home or Facility</p> <p><input type="radio"/> EMail</p> <p><input type="radio"/> Postal Mail or Fax</p>	<p>* Client Age Group:</p> <p><input type="radio"/> 64 or Younger</p> <p><input type="radio"/> 65-74</p> <p><input type="radio"/> 75-84</p> <p><input type="radio"/> 85 or Older</p> <p><input type="radio"/> Not Collected</p>	<p>* Client Gender:</p> <p><input type="radio"/> Female</p> <p><input type="radio"/> Male</p> <p><input type="radio"/> Not Collected</p>
<p>* Client Race-Ethnicity:</p> <p><input type="checkbox"/> Hispanic, Latino, or Spanish Origin</p> <p><input type="checkbox"/> White, Non-Hispanic</p> <p><input type="checkbox"/> Black, African American</p>	<p>* Client Primary Language Other Than English:</p> <p><input type="radio"/> Primary Language Other Than English</p> <p><input type="radio"/> English is Client's Primary Language</p> <p><input type="radio"/> Not Collected</p>	

First vs. Continuing Contact (REQUIRED. Select one option.)

- **First contact for issue:** Select this option if this is the client’s first contact to discuss a particular issue or if this is the client’s first ever contact at your agency. If the client has previously contacted your agency for assistance with separate issues, you can still select this option because it is the first time you are providing assistance to the client for this particular topic.
- **Continuing contacts for issue:** Select this option if this is not the client’s first contact with your agency to discuss a particular issue. For example, the contact may be to follow up on a previously discussed issue.

For a series of contacts (over days or weeks) that are conceptually related, consider the first contact as the “initial contact” and all the remaining contacts about the issue as “continuing contacts”. The intent of this field is to be able to document that it took a particular number of contacts with this client to resolve their issue(s). If this client calls back months later, consider that to be a new episode of service, and start the first contact in this new episode as the “initial

contact”, and all subsequent contacts as “continuing contacts”. Ideally, the final contact in an episode should be the contact that documents that the issue was resolved.

How Did Client Learn About SHIP? (REQUIRED, Select one option.)

Use the following descriptions to select one option that best describes how the client learned about the SHIP.

- **Previous contact:** Select this option if this is not the client’s first contact with the agency for services.
- **CMS/Medicare:** (1-800-Medicare, www.medicare.gov, Medicare & You, CMS Mailing). Select this option if the client learned about SHIP from a Medicare hotline counselor, a CMS Web site, a CMS publication, a CMS regional office, or other CMS-sponsored source.
- **Presentations:** Select this option if the client learned about SHIP at a presentation or health fair sponsored by SHIP or other organization.
- **Mailings:** Select this option if the client learned about SHIP from publicity that SHIP distributed by mail, SHIP brochures left in community locations, or another agency (e.g., a SHIP brochure enclosed with a mailing from the Alzheimer’s Association).
- **Another agency:** Select this option if the client was referred by another agency such as a disability organization, a senior organization, or an advocacy organization.
- **Friend or relative:** Select this option if a friend or relative referred the client to SHIP.
- **Media:** Select this option if the client learned about SHIP from a public service announcement (PSA), radio, newspaper, or other media advertisement.
- **State website:** Select this option if the client learned about SHIP from the website of the state SHIP or another state agency.
- **Other:** Select this option *only* if the response cannot fit into one of the previous categories.
- **Not collected:** Select this option if the client is unsure, does not know, or if this question was not asked.

Method of Contact (REQUIRED. Select one option.)

Select one method of contact per client contact to describe how the counselor provided services for this episode of service. The options for type of contact are:

- Phone call
- Face-to-face at counseling location or event site
- Face-to-face at client’s home or facility
- Email
- Postal mail or fax

Client Age Group (REQUIRED, Select one option.)

Select an age range for the beneficiary. It is used to document service provision to all age groups of Medicare beneficiaries and to identify when services need to be adjusted to better meet the needs of specific age groups. If you do not collect information on age during your contact with the client, you may select the “Not Collected” option. However, because information on age is used in analyzing service provision, minimizing use of the “Not Collected” option is important.

Client Gender (REQUIRED)

This field allows SHIPs to make sure that their services are accessible to all members of the Medicare community, so that no group is underserved. Counselors should attempt to record gender, even on quick calls, and should minimize use of the “Not Collected” option. In most instances, counselors can reliably guess a client’s gender visually or by voice.

Client Race-Ethnicity (REQUIRED)

This field allows SHIPs to ensure that their services are accessible to all members of the Medicare community, so that no group is overlooked. Counselors should attempt to record race/ethnicity and should minimize use of the “Not Collected” option. You may select more than one option to describe the client’s race/ethnicity.

Client Primary Language Other Than English (REQUIRED)

Indicate whether the client’s primary language is English or a language other than English. Select “Not Collected” if the client was not asked or did not provide this information.

<p>* Client Monthly Income:</p> <p><input type="radio"/> Below 150% FPL</p> <p><input type="radio"/> At or Above 150% FPL</p> <p><input type="radio"/> Not Collected</p>	<p>* Client Assets:</p> <p><input type="radio"/> Below LIS Asset Limits</p> <p><input type="radio"/> Above LIS Asset Limits</p> <p><input type="radio"/> Not Collected</p>
<p>* Receiving or Applying for Social Security Disability or Medicare Disability:</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p><input type="radio"/> Not Collected</p>	<p>* Dual Eligible with Mental Illness / Mental Disability :</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p><input type="radio"/> Not Collected</p>

Client Monthly Income (REQUIRED)

This field allows SHIPs to document service provision to low-income beneficiaries. While income is a sensitive topic, knowledge of a client’s income may help the counselor assess whether the client is eligible for Medicaid, QMB, SLMB, or any other needs-based programs.

For this field, you will note whether the beneficiary’s income is below the Federal Poverty Level (FPL) or equal to/above 150% of the FPL. The FPL varies from state to state and is adjusted annually. Your SHIP Director will provide you with the FPL income figure for your state to use as reference. Select the appropriate option to indicate whether the beneficiary’s income is below or equal to/above 150% of the current FPL. Select “Not Collected” if the client refuses to reveal his/her income or if this question was not asked.

Note: This category refers to the monthly “household” income of the **client** or the **client and spouse** only, not relatives with whom the client might be living.

Hint: If the counselor is feeling uncomfortable with this topic, the counselor might tell the client that there are different programs available for different income levels. The counselor can provide a list of the income levels and the programs that correspond with them and ask the client to report which programs sound appropriate to his/her income level. The counselor can then explain these specific programs to the client.

Hint: The counselor might show the client income that is 150% of the FPL and ask the client whether their income is above or below this amount.

Note: LIS is not available to people in the U.S. territories.

Client Assets (REQUIRED)

In addition to client monthly income of 150% below the Federal poverty level, resources are used to determine eligibility for the Low-income Subsidy (LIS). The asset item more precisely identifies true potential LIS individuals. Only two types of assets are considered:

- Liquid resources (i.e., savings accounts, stocks, bonds, and other assets that could be cashed in within 20 days; and,
- Real estate, not including your home or the land on which your home is located.

Note: For the purpose of calculating performance scores, client assets will not be considered.

Receiving or Applying for Social Security Disability or Medicare Disability (REQUIRED)

This field allows SHIPs to document service provision to beneficiaries who are disabled. Select “Yes” if the client is currently enrolled in Medicare as a result of a diagnosis of End Stage Renal Disease (ESRD) or through a SSA determination that the individual has been diagnosed with a disability. Your response to this field will be cross-checked with the client’s age range.



Clients who are 65 or over will automatically have “No” selected on their form because according to the CMS programmatic definition, only beneficiaries 64 and under are eligible for a “Yes” response. At 65 years, beneficiaries are considered to have moved from the disabled program to the over-65 (aged) program.

Although it may be a difficult topic to discuss, counselors should attempt to record disability status, even on quick calls, and should minimize use of the “Not Collected” option. To avoid client discomfort, counselors may be able to assess a client’s disability status by asking:

“Are you receiving or applying for (or interested in applying for) Medicare or Social Security benefits due to disability or end stage renal disease?”

Dual Eligible with Mental Illness / Mental Disability (DMD) (REQUIRED)

Indicate whether the client is Dual Eligible and has a Mental Disability (DMD). Select “Not Collected” if this question was not asked.

DMD refers to an individual who is enrolled both in Medicare and some form of Medicaid benefit and may exhibit behaviors including, but not limited to schizophrenia, depression, Alzheimer’s disease, anxiety disorders, post-traumatic stress disorders, psychotic disorders, and addiction disorders. It also includes individuals who are mentally challenged or intellectually disabled. Clients may self-disclose their mental illness or mental disability status. In addition, the client’s representative or the client’s referral source might identify such clients. States are not encouraged to identify such clients using psychiatric drug lists since some such drugs can be used for non-psychiatric purposes.

Topics Discussed

Many clients need assistance with multiple issues during a client contact session. The Client Contact form is designed to reflect all major topics discussed during the course of the client contact session. Listed below are descriptions of each of the topics that may be discussed between a client and counselor. Counselors must select the boxes for all topics that they discuss with the client, and can select all boxes that apply. If, for example, a counselor discusses eligibility for Medicare Advantage and provides an explanation of benefits, both boxes should be selected.

The topics are divided into the following main categories:

- Prescription Drug Assistance
 - Medicare Prescription Drug Coverage (Part D)
 - Part D Low Subsidy (LIS/Extra Help)
 - Other Prescription Assistance
- Medicare (Parts A & B)
- Medicare Advantage (HMO,POS,PPO,PPFS,SNP,MSA, Cost)
- Medicare Supplement/Select
- Medicaid
- Other

Prescription Drug Assistance (REQUIRED)

* PRESCRIPTION DRUG ASSISTANCE	
Medicare Prescription Drug Coverage (Part D): <input type="checkbox"/> Eligibility/Screening <input type="checkbox"/> Benefit Explanation <input type="checkbox"/> Plans Comparison <input type="checkbox"/> Plan Enrollment/Disenrollment <input type="checkbox"/> Claims/Billing <input type="checkbox"/> Appeals/Grievances <input type="checkbox"/> Fraud and Abuse <input type="checkbox"/> Marketing/Sales Complaints or Issues <input type="checkbox"/> Quality of Care <input type="checkbox"/> Plan Non-Renewal	Medicare Advantage (HMO, POS, PPO, PFFS, SNP, MSA, Cost): <input type="checkbox"/> Eligibility/Screening <input type="checkbox"/> Benefit Explanation <input type="checkbox"/> Plans Comparison <input type="checkbox"/> Plan Enrollment/Disenrollment <input type="checkbox"/> Claims/Billing <input type="checkbox"/> Appeals/Grievances <input type="checkbox"/> Fraud and Abuse <input type="checkbox"/> Marketing/Sales Complaints or Issues <input type="checkbox"/> Quality of Care <input type="checkbox"/> Plan Non-Renewal
Part D Low Income Subsidy (LIS/Extra Help): <input type="checkbox"/> Eligibility/Screening <input type="checkbox"/> Benefit Explanation <input type="checkbox"/> Application Assistance <input type="checkbox"/> Claims/Billing <input type="checkbox"/> Appeals/Grievances	Medicare Supplement/Select: <input type="checkbox"/> Eligibility/Screening <input type="checkbox"/> Benefit Explanation <input type="checkbox"/> Plans Comparison <input type="checkbox"/> Claims/Billing <input type="checkbox"/> Appeals/Grievances <input type="checkbox"/> Fraud and Abuse <input type="checkbox"/> Marketing/Sales Complaints or Issues <input type="checkbox"/> Quality of Care <input type="checkbox"/> Plan Non-Renewal
Other Prescription Assistance: <input type="checkbox"/> Union/Employer Plan <input type="checkbox"/> Military Drug Benefits <input type="checkbox"/> Manufacturer Programs <input type="checkbox"/> State Pharmaceutical Assistance Programs <input type="checkbox"/> Other <small>Specify Other</small>	Medicaid: <input type="checkbox"/> Medicare Savings Programs (MSP) Screening (QMB, SLMB, QI)

Medicare Prescription Drug Coverage (Part D)

Medicare prescription drug coverage is available to all people who are enrolled in Medicare and is provided through a Prescription Drug Plan (PDP) or a Medicare Health Plan with Prescription Drug Coverage (MA-PD).

- 1 Eligibility/Screening: Check this box if you assist with understanding Medicare Prescription Drug Plans (PDP) and/or screening of eligibility for a PDP/MA-PDP and/or answer eligibility questions.
- 2 Benefit Explanation: Check this box if you explain what the PDP/MA-PD plans do or do not pay for, such as coverage areas, quantity limits, and step therapy.
- 3 Plans Comparison: Check this box if you assist with PDP/MA-PD comparisons (e.g. Plan Finder search).
- 4 Plan Enrollment/Disenrollment: Check this box if you assist with enrollment or disenrollment from a PDP/MA-PD, either online or with a paper application. For disenrollment, the reasons could be related to changes in provider participation, changes in premiums, changes in covered benefits, and/or eligibility for Special Enrollment Period (SEP).

-
- 5 Claims/Billing: Check this box if you assist with PDP/MA-PD prescription drug claims and/or billing issues, help the beneficiary to understand the claims process, and/or help an individual sort bills and teach them to organize billings and claims paperwork.
- 6 Appeals/Grievances: Check this box if you assist with PDP/MA-PD prescription drug appeals and/or grievances.
- 7 Fraud and Abuse: Check this box if you assist with PDP/MA-PD fraud and abuse reporting, investigating, and/or referrals to agencies (e.g. Senior Medicare Patrol (SMP), State Department/Bureau of Insurance).
- 8 Marketing/Sales Complaints or Issues: Check this box if you assist with PDP/MA-PD prescription drug marketing and/or sales complaints (e.g. against insurance brokers/agents).
- 9 Quality of Care: Check this box if you assist with PDP/MA-PD quality of care issues or concerns that are not considered appeals and/or grievances.
- 10 Plan Non-Renewal: Check this box if you assist with any changes in a client's coverage due to PDP/MA-PD non-renewals/terminations.

Part D Low Income Subsidy (LIS/Extra Help)

- 11 Eligibility/Screening: Check this box if you assist with understanding LIS and/or screening of eligibility for LIS and/or answer eligibility questions.
- 12 Benefit Explanation: Check this box if you explain the extra help program.
- 13 Application Assistance: Check this box if you assist with applying and submitting an LIS application, either paper or electronically via SSA's website.
- 14 Claims/Billing: Check this box if you assist with LIS claims and/or billing issues, help the beneficiary to understand the claims process, and/or help an individual sort bills and teach them to organize billings and claims paperwork related to LIS.
- 15 Appeals/Grievances: Check this box if you assist with LIS appeals and/or grievances.

Other Prescription Assistance

- 16 Union/Employer Plan: Check this box if you assist with questions related to prescription drug coverage under Union/Employer plans. This includes assistance with understanding benefits, screening and applying for benefits, claims/billing and appeals/grievances.

- 17** Military Drug Benefits: Check this box if you assist with questions related to prescription drug coverage under military benefits (e.g. Tricare). This includes assistance with understanding benefits, screening and applying for benefits, claims/billing and appeals/grievances.
- 18** Manufacturer Programs: Check this box if you assist with questions related to prescription drug assistance under manufacturer programs (e.g. Prescription Assistance Programs (PAPs)). This includes assistance with answering questions related to eligibility, screening and applying for benefits, claims/billing and appeals/grievances.
- 19** State Pharmaceutical Assistance Programs: Check this box if you assist with questions related to prescription drug coverage under State Pharmacy Assistance Programs (SPAPs). This includes assistance with understanding benefits, screening and applying for benefits, claims/billing and appeals/grievances.
- 20** Other: Check this box for all other prescription assistance programs/plans (e.g. local sources of assistance such as American Red Cross, Salvation Army, churches, non-profit organizations that assist clients with obtaining medications related to specific diseases, such as cancer drugs) that might be available to help beneficiaries pay for prescription drugs.

Medicare (Parts A & B)

- 21** Eligibility: Check this box if you assist with understanding eligibility for Medicare Parts A and/or B.
- 22** Benefit Explanation: Check this box if you explain what Medicare Parts A and/or B does or does not pay for.
- 23** Claims/Billing: Check this box if you assist with Medicare Parts A and/or B claims and/or billing issues, help the beneficiary to understand the claims process, and/or help an individual sort bills and teach them to organize billings and claims paperwork.
- 24** Appeals/Grievances: Check this box if you assist with Medicare Parts A and/or B appeals and/or grievances.
- 25** Fraud and Abuse: Check this box if you assist with Medicare Parts A and/or B fraud and abuse reporting, investigating, and/or referrals to agencies (e.g. SMP).
- 26** Quality of Care: Check this box if you assist with Medicare Parts A and/or B quality of care issues or concerns that are not considered appeals and/or grievances, including referrals to the state Quality Improvement Organization (QIO) for hospital quality of care concerns.

Medicare Advantage (HMO, POS, PPO, PFFS, SNP, MSA, Cost)

- 27** Eligibility/Screening: Check this box if you assist with understanding Medicare Advantage/Medicare Health Plans (MA plans) and/or screening of eligibility for a MA plans and/or answer eligibility questions.
- 28** Benefit Explanation: Check this box if you explain what the MA plans do or do not pay for, such as covered services, co-pays/co-insurance, deductibles, using certain providers for services, and possible need for referrals.
- 29** Plans Comparison: Check this box if you assist with MA plan comparisons (e.g. using the Plan Finder tool, formally known as Medicare Options Compare tool).
- 30** Plan Enrollment/Disenrollment: Check this box if you assist with enrollment or disenrollment from a MA plan, either online by enrolling into a new plan or with a letter to the plan requesting disenrollment. For disenrollment, the reasons could be related to changes in provider participations, changes in premiums, changes in covered benefits, and/or eligibility for Special Enrollment Period (SEP).
- 31** Claims/Billing: Check this box if you assist with MA plan claims and/or billing issues, help the beneficiary to understand the claims process, and/or help an individual sort bills and teach them to organize billings and claims paperwork.
- 32** Appeals/Grievances: Check this box if you assist with MA plan appeals and/or grievances.
- 33** Fraud and Abuse: Check this box if you assist with MA plan fraud and abuse reporting, investigating, and/or referrals to agencies (e.g. SMP, State Department/Bureau of Insurance).
- 34** Marketing/Sales Complaints or issues: Check this box if you assist with MA plan marketing and/or sales complaints (e.g. from insurance brokers/agents).
- 35** Quality of Care: Check this box if you assist with MA plan quality of care issues or concerns that are not considered appeals and/or grievances.
- 36** Plan Non-Renewal: Check this box if you assist with any changes in a client's coverage due to MA plan non-renewals/terminations.

Medicare/Supplement (Medigap)

- 37** Eligibility/Screening: Check this box if you assist with understanding Medigap policies and/or screening of eligibility for a policy and/or answer eligibility questions.
- 38** Benefit Explanation: Check this box if you explain what the Medigap policies do or do not pay for, such as covered services, co-pays/co-insurance, and deductibles.

- 39 Plans Comparison: Check this box if you assist with Medigap policy comparisons (e.g. compare Medigap policies on Medicare's website, obtaining policy information from your State Department/Bureau of Insurance).
- 40 Claims/Billing: Check this box if you assist with Medigap policy claims and/or billing issues, help the beneficiary to understand the claims process, and/or help an individual sort bills and teach them to organize billings and claims paperwork.
- 41 Appeals/Grievances: Check this box if you assist with Medigap policy appeals and/or grievances.
- 42 Fraud and Abuse: Check this box if you assist with Medigap policy fraud and abuse reporting, investigating, and/or referrals to agencies (e.g. SMP, State Department/Bureau of Insurance).
- 43 Marketing/Sales Complaints or issues: Check this box if you assist with Medigap policy marketing and/or sales complaints (e.g. from insurance brokers/agents).
- 44 Quality of Care: Check this box if you assist with Medigap policy quality of care issues or concerns that are not considered appeals and/or grievances.
- 45 Plan Non-Renewal: Check this box if you assist with any changes in a client's coverage due to Medigap policy non-renewals/terminations.

Medicaid

- 46 Medicare Savings Programs (MSP) Screening (QMB, SLMB, QI): Check this box if you assist with understanding MSP and/or screening of eligibility for MSP and/or answer eligibility questions.
- 47 MSP Application Assistance: Check this box if you assist with applying and submitting an MSP application.
- 48 Medicaid (SSE, Nursing Home, MEPD, Elderly Waiver) Screening: Check this box if you assist with understanding Medicaid (all other Medicaid programs except MSP) and/or screening of eligibility for Medicaid and/or answer eligibility questions.
- 49 Medicaid Application Assistance: Check this box if you assist with applying and submitting a Medicaid application (all Medicaid applications except MSP).
- 50 Medicaid/QMB Claims: Check this box if you assist with Medicaid policy claims and/or billing issues, help the beneficiary to understand the claims process, and/or help an individual sort bills and teach them to organize billings and claims paperwork.
- 51 Fraud and Abuse: Check this box if you assist with Medicaid fraud and abuse reporting, investigating, and/or referrals to agencies (e.g. SMP, State Medicaid office).

Other

- 52** Long Term Care (LTC) Insurance: Check this box if you assist with explaining LTC insurance, which may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, marketing/sales complaints/issues, quality of care, and plan non-renewal.
- 53** LTC Partnership: Check this box if you assist with explaining LTC partnership policies, which may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, marketing/sales complaints/issues, quality of care, and plan non-renewal.
- 54** LTC Other: Check this box for all other LTC assistance.
- 55** Military Health Benefits (e.g. Tricare, VA benefits): Check this box if you assist with explaining military health benefits (not including drug benefits which are covered under other prescription assistance (number 17 on the Client Contact form)), which may include eligibility explanation/screening, benefit explanation, comparing military benefits to Medigap, applying for benefits, claims/billing, appeals/grievances, fraud and abuse, quality of care, and referral to a Military Retiree Benefits Information Officer/program.
- 56** Employer/Federal Employee Health Benefits (FEHB): Check this box if you assist with explaining employer/FEHB (not including drug benefits which are covered under other prescription assistance (number 16 on the Client Contact form)), which may include eligibility explanation/screening, benefit explanation, comparing benefits to Medigap, applying for benefits, claims/billing, appeals/grievances, fraud and abuse, and quality of care.
- 57** COBRA: Check this box if you assist with explaining COBRA, which may include eligibility explanation/screening, benefit explanation, applying for benefits, claims/billing, appeals/grievances, fraud and abuse, and quality of care.
- 58** Other Health Insurance: Check this box if you assist with any other health insurance questions (e.g. free clinics, ERISA).
- 59** Other: Check this box for all other assistance provided not covered in a topic above. Describe the type of assistance provided in the “Specify Other” box. For example, if you assisted a client with a Medicare card replacement, check the “Other” box and enter “Medicare card replacement” into the box.

Note: Before checking this category, please verify that the type of assistance provided does not fit into a pre-existing Topic Discussed category, by contacting the SHIP NPR Help Desk at SHIPNPRHelp@TechnicalFrontiers.com or (800) 253-7154 ext. 1.

<p>* Total Time Spent on This Contact Date:</p> <p><input type="text"/> Hours <input type="text"/> Minutes</p>		<p>* Status:</p> <p><input type="radio"/> General Information and Referral</p> <p><input type="radio"/> Detailed Assistance - In Progress</p> <p><input type="radio"/> Detailed Assistance - Fully Completed</p> <p><input type="radio"/> Problem Solving / Problem Resolution - In Progress</p> <p><input type="radio"/> Problem Solving / Problem Resolution - Fully Completed</p>	
<p>Comments</p> <p><input type="text"/></p> <p>(1000 characters remaining)</p>			
<p>CMS Special Use Fields</p> <p>MIPPA CLIENT 1 2 3: <input type="text"/></p>		<p>State and Local Special Use Fields</p> <p><input type="text"/></p>	
<p><input type="button" value="Submit"/></p>			

Total Time Spent on This Contact Date (Required)

The Time Spent per contact represents the total hours and minutes a counselor spent counseling the client *plus* time spent working directly on behalf of the client for this contact. Examples of time spent working directly on behalf of the client include time spent:

- Researching
- Referring
- Advocating (calling agencies on the client's behalf)
- Trying to reach the client
- Waiting to meet with the client
- Preparing materials to send to the client
- Completing paperwork/forms to report the client contact
- Travel time to client

If multiple sessions with the same client occur on the same day, they are considered as 1 contact and you must add all of the time spent that day and enter it into time spent.



Sometimes the time spent on a particular contact may take place over multiple days. For example, you may spend 1 hour with the client on the initial contact date, 1 hour the next day researching information on behalf of the client, and another 20 minutes the following day completing paperwork on behalf of the client. In this instance, 2 hours and 20 minutes should be entered as the total time spent for the initial client contact date. You do not need to fill out a new form for each day since the work is related to the initial contact. You would only complete a new form if you had another session with the client.



- Enter only 0–59 in the “Minutes” box. For example, if you spend an hour and a half with a client, record the time as 1 hour 30 minutes, not 90 minutes.
- Be careful not to put the minutes in the “Hours” box. For example, if you spend 15 minutes with a client, enter “15” in the “Minutes” box only and leave the “Hours” box empty.
- Do not include time spent on non-SHIP activities.



If you have a second session with a client on the same date and have already entered in a form for the client (after the first session), you will need to look up the previously entered form and modify it to add the additional time spent and topics discussed in the second session. Use the instructions in [Look up a Previously Entered Client Contact Form](#) to do this.

If two separate counselors see the same client on the same day, each counselor should complete a separate form for the contact.

Status (REQUIRED)

This field allows the counselor to indicate the nature of the assistance they provided.

Formal definitions for these categories have not yet been developed. The following definitions are intended to give counselors some guidance as to how to interpret these options. Select the “In Progress” option if the issue was not resolved.

General information and referral: This refers to simple referrals of a beneficiary to another program or information source, or providing “descriptive” information about SHIP services.

Detailed assistance (In progress / Fully completed): This refers to what is typically considered the primary, unique counseling service that distinguishes the SHIP program—assisting beneficiaries with plan choices and coverage decisions.

Problem solving / problem resolution (In progress / Fully completed): This refers to situations where the need for example, for coverage changes are imposed (i.e., not beneficiary-driven), beneficiary appeals, quality of care issues, or complaints.



The options above are not listed in order of increasing intensity; therefore “Problem Solving” is not necessarily considered to be more time intensive than “Detailed Assistance”. Counselors should pick the option that best matches the services they provide.

Comments

A counselor may use this box to write any additional notes for their benefit. The information entered into this box is for the counselor's convenience only, and will not be used in any way by CMS or AIR.



Do not write a client's social security number in the comments box.

Comments can include information that may be helpful to the counselor or coordinator such as:

- A summary of the question or problem that the client described to the counselor
- The type of insurance coverage and policy numbers, if needed for counseling purposes
- What action was taken by the counselor and the outcome or resolution to the problem
- Referrals to other agencies
- Whether materials were mailed to the client
- The status or outcome of the contact

CMS Special Use Fields

National Special Use Fields authorized by CMS will be listed in this section. This field was previously used for states that used the NPR system to collect MIPPA data. Although MIPPA data is no longer being collected, CMS special use fields may be used in the future to collect other types of data.

State and Local Special Use Fields

Any field(s) authorized by your specific state will be listed here. Contact your agency director or SHIP Director if you have questions about these fields. If there are no fields listed here, your state does not use any special use fields.

Submit the Client Contact Form

Agency	User	EditMyProfile	RR	CC	PAM	Upload	SHIPProfile	NPRRe
<h3>Success!</h3> <p>This Client Contact has successfully been edited.</p> <p> Add another contact for THIS client Add a contact for a NEW client in the SAME agency Add a contact for a NEW client in a DIFFERENT agency </p>								
<h3>View Client Contact</h3> <p style="text-align: right;"> Printer Friendly Version <input type="button" value="Edit"/> </p> <p>Submitted By: OLD NPR DATA - NOT A REAL USER (OH) On: 10/31/2011</p>								

Upon completing the Client Contact form, click “Submit” at the bottom of the form to save the record. A message will appear at the top of the page that says “Success! This Client Contact has successfully been saved.” If this message does not display, the Client Contact form was not saved. If an error was made while completing the form, a description of the error will display at the top of the form when you click “Submit”. Fix the error(s) and resubmit the form by clicking the “Submit” button at the bottom of the page.

When you successfully submit the form, the submitted form will display on the screen, along with the “Success” message. If you want to fill out a new Client Contact form, you can use one of the following links that display on this page. **Read the following choices carefully before making a selection.**

Add another contact for THIS client: This link allows you to enter a new Client Contact form for the *same* client (who was on the form you just submitted). Do not click on this link to add a new Client Contact form for a *different* client.

- **Add a contact for a NEW client in the SAME agency:** This link allows you to enter a new Client Contact form for a *different* client at the *same* agency (as the client whose form you just submitted).
- **Add a contact for a NEW client in a DIFFERENT agency:** This link allows you to enter a new Client Contact form for a *different* client at a *different* agency (than the client whose form you just submitted).

CHAPTER 3

PUBLIC AND MEDIA ACTIVITY FORM

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Public and Media Form Overview

What is a Public and Media activity?

A Public and Media (PAM) activity can include an in-person interactive presentation to the public conducted by a SHIP; a booth/exhibit at a fair, conference, or other public event; and a radio, TV, or Web site event. Detailed definitions of each of these PAM events are included in the section, [Fill Out a PAM Form](#).

When should I fill out a PAM form?

A PAM form must be completed for each PAM event carried out by a SHIP. If a SHIP counselor or coordinator assists a beneficiary with enrollment or provides other substantial one-on-one assistance during or after a Public and Media Activity (PAM) event, the following steps are required:

- If the counselor assisted the beneficiary with enrollment, that client should be included in the aggregate count for the “Estimated Persons Provided Enrollment Assistance” data fields in the section of the PAM form for that event, AND
- A Client Contact form should be completed to collect as much information as possible about that counseling contact.

Open a PAM Form

You must be logged in to the SHIP NPR website (<https://shipnpr.shiptalk.org>) to enter a PAM form.

Once you log in to the SHIP NPR website, click on the light blue “PAM” button at the top of the screen. This directs you to the “Find a Public Media Event” screen (see screenshot below).

Find a Public Media Event

[Add a PAM](#)
[Add a Special Field](#)
[List Recent Pams](#)

Activity Start Date Range: From: To:

State:

Agency:

Presenter:

Submitter:

Event Name	Agency Name	Start Date	End Date	
TEST	Charles County Aging Services	10/01/2010	10/01/2010	View Edit

1

This screen allows you to complete the following tasks:

- A. [Add a New PAM Form](#)
- B. [Look Up and/or Print a Previously Entered PAM Form](#)
- C. [Edit a Previously Entered PAM Form](#)
- D. [Add, Edit, or Delete a Special Field](#)
- E. [Delete a PAM Form \(for SHIP Directors Only\)](#)

A. Add a New PAM Form

Once you log in to the SHIP NPR website, click on the light blue “PAM” button at the top of the screen. This directs you to the “Find a Public Media Event” screen.

To enter a new PAM form, click on the link titled “Add a PAM”. This link is located on the upper right hand side of the webpage. You can also find this link on your homepage when you

first login to the SHIP NPR website. The link is located beneath the welcome message on the left side of the webpage.

Clicking on the link directs you to a new PAM form if you are a registered user at only one agency. If you are a registered user at more than one agency, you will see a dropdown list containing the names of your agencies. Select the name of the agency that organized the activity. You will then be directed to a new PAM form.



If you receive an “Unauthorized Access” message when you click on the “PAM” button, your SHIP NPR account was not given the necessary level of permissions to fill out PAM forms. To submit PAM forms, the “Task Functions and Access Authorizations” field on your account profile must be designated as “Public and Media Staff” at your agency. Contact an administrator or your agency director to request the necessary level of permissions.

B. Look Up and/or Print a Previously Entered PAM Form

Once you log in to the SHIP NPR website, click on the light blue “PAM” button at the top of the screen. This directs you to the “Find a Public Media Event” screen.

There are two ways to locate a previously entered PAM form:

- **Recently entered forms:** Your recently entered PAM forms will display at the bottom of the screen. You can also click on the “List Recent PAMs” link on the upper right hand side of the webpage. In the previous screenshot, “TEST” is a recently entered record.
- **PAM search:** If the PAM does not display in the list of your recently entered records, you can also search for your previously entered forms by using the search fields on this page. You can search by date range of the event, agency that organized the event, individual who presented at the event, or individual who submitted the PAM form. You **must** specify a date range when conducting a search. You can either enter in a range of dates (e.g. 09/01/2011 to 09/15/2011) or a specific date (e.g., 09/01/2011 to 09/01/2011). However, you **do not** need to also use all of the other search fields to look for a previously entered record. Generally, it is sufficient to use a date range and agency when searching for a previously entered PAM form.

When you locate the previously entered PAM form, click “View” next to the desired record to view the record but not make any changes to it. To print the record, click the “Printer Friendly Version” link at the upper right hand side of the screen to be directed to a version of the form that you can print.

C. Edit a Previously Entered PAM Form

Occasionally, a counselor may need to edit a previously submitted PAM form. For example, you may need to modify a record if you discover that something was incorrectly entered or if you obtained additional pertinent information about the event after you submitted the form.

To edit a previously submitted PAM form, you must locate the form using the instructions in [Look Up and/or Print a Previously Entered PAM Form](#). Once you locate the record, click

“Edit” next to the record to be directed to the previously entered form. Once you make changes to the form, scroll to the bottom of the form to click “Submit.” A message will appear at the top of the page that says, “Success! This PAM form has successfully been edited”.

D. Add, Edit, or Delete a Special Field

Only SHIP Directors and other state administrators can add a special use field (SUF) to the PAM form.

Instructions for Administrators: Add a PAM Special Use Field

1. Once you log in to the SHIP NPR website, click on the light blue “PAM” button at the top of the screen. This directs you to the “Find a Public Media Event” screen.
2. Click on the link to “Add a Special Field,” located on the upper right hand side of the screen.
3. Before adding a SUF, use the search filter to check what special fields were already defined for your state on the PAM form. Use the calendar option to enter a wide date range (e.g., multiple years) to be sure that you see all existing special fields. You can also manually enter the dates using the mm/dd/yyyy format. Click “Search”. The results will display below. If there are no existing state-defined PAM SUFs for the date range, a message will appear at the top of the screen that says, “No special fields could be found”.
4. Click “Add” to add a SUF to the PAM form.

Name. In the name field, enter text that describes the field and its coding. The name you select for the field will display on the online PAM form, so be sure to use a name that counselors will understand and remember. For example, a field titled “Preventive Bene Y N” would use a “yes” or “no” response to indicate whether Medicare preventive benefits were discussed during the presentation.

Start and end dates. Use the calendar options to select start and end dates for the field. The start date is the first calendar date when the special field will be displayed on your state’s PAM form. For proprietary data states, the start date is the first calendar date that batch upload records will accept values into this special field. The end date is when you expect the field to retire. Select an end date that is sufficiently far into the future so the field will not expire quickly. You can modify the end date at any time if necessary.

Description. This field explains the documentation used in the SUF. For example, for fields that use a “yes” or “no” response, the description can say “Y=Yes N=No”.

Validation type. There are two options for this field. Select “Numeric” if users are expected to enter number codes (e.g., 1, 2, 3, or \$200). Select “Alphanumeric” if users are expected to enter text (e.g., Y or N) or some combination of text and numbers.

Is required. Indicate whether this is a required field for your state by selecting either “Yes” or “No”.

Field type. This field is pre-populated to display “State” since this SUF applies to the entire state.

Form type. This field is pre-populated to display “Public Media Activity” since the SUF is for the PAM form.

5. Click “Save” to save the SUF.
6. A message will appear that says “The special field was created and assigned available ordinal value [a number between 11 and 20]”. The number assigned to the special field will depend on the number of existing state special fields. Values 1 through 10 are reserved for CMS National special fields.
7. You can view the SUF by opening a new PAM form using the instructions in [Fill Out a PAM Form](#). Scroll to the bottom of the blank form. The new field should display at the bottom of the form.

Instructions for Administrators: Edit or Delete a PAM Special Use Field

1. Once you log in to the SHIP NPR website, click on the light blue “PAM” button at the top of the page. This directs you to the “Find a Public Media Event” screen.
2. Click on the link to “Add a Special Field,” located on the upper right hand side of the screen.
3. Use the search option to locate the SUF. Select a wide date range (e.g., multiple years) to be sure that you see all existing PAM SUFs. You can also manually enter the dates using the mm/dd/yyyy format. Click “Search”. The results will display on the screen.
4. Locate the SUF you wish to modify and click on either the “Edit” or “Delete” link next to it, depending on your intended action. If making edits to the special field, click “Save” once your edits are complete.

E. Delete a PAM Form (SHIP Directors Only)

State SHIP Directors are the only individuals within a state who can delete a PAM record. Deletions cannot be carried out by state administrators.

Instructions for SHIP Directors: Delete a PAM Record

1. Log in to your SHIP NPR account at <https://shipnpr.shiptalk.org>.
2. Click on the “PAM” tab.
3. Locate the PAM record that needs to be deleted using the instructions in [Look Up and/or Print a Previously Entered PAM Form](#). Click “View” beside the record to view the full record.
4. Click the “Delete” button at the top right hand side of the screen. A pop-up box will display that asks you to confirm if you want to delete the record. Click “Yes” if you wish to delete the record.
5. A message will display at the top of the page that says, “Success! This PAM record has been deleted successfully”.
6. You can verify that the record was deleted by trying to search for it. You should no longer be able to locate the deleted record using a search.

Fill Out a PAM Form

An item marked with an * indicates a required field.

Presenter or Contributor Name (REQUIRED)

Use the dropdown list to select the name of the presenter or other staff who contributed to the event. If there was more than one presenter or contributor, use the dropdown boxes on the subsequent lines to select each of their names. If there are more than five presenters or contributors, click on “Add New Row” to increase the number of presenter rows.

If the presenter is a counselor or staff member at your agency but does not appear in the dropdown list, that individual’s SHIP NPR account was not given the necessary level of permissions to be listed on PAM forms. To appear in the dropdown list, the “Task Functions and Access Authorizations” field on an individual’s account profile must be designated as “Public and Media Staff”. Contact an administrator or your agency director to request that they modify the individual’s necessary level of permissions.

If the presenter is not affiliated with your agency (e.g., a guest speaker), click on the “Add New Presenter” button. In the pop-up window that appears, add the individual’s information and click “Submit”. The presenter’s name should now appear in the dropdown list. You will be able to select this individual’s name on subsequent PAM forms if he or she assists in future events.

Affiliation

Use this field to briefly describe the affiliation of the presenter if he or she is outside the SHIP community (e.g., a spokesperson from another organization).

Total Hours Spent on Activity per Presenter/Contributor (REQUIRED)

Round the total length of time that the presenter or contributor spent on the event to the nearest quarter-hour and enter it in the box provided. Time spent on a particular event includes preparation and travel time, as well as the time spent during the activity itself. When typing in the hours spent, round up to the nearest quarter-hour. For example, the following entries are allowed: 1, 1.25, 1.5, and 1.75.

Activity or Event (REQUIRED)

You must enter information for **only one** activity or event in this section. This section provides detailed descriptions of each PAM activity type.

You can fill out the information associated with **only one type of activity** per PAM form. For instance, at an event that includes a presentation as well as an informational or enrollment table, two PAM forms must be filled out.



Fill out all boxes associated with the activity or event. If you enter a value into some of the boxes underneath one activity but leave the others blank, an error message will display. For example, if you enter a value into the “Estimated Number of Attendees” box underneath “Interactive Presentation to Public”, but leave the box for “Estimated Persons Provided Enrollment Assistance” blank, you will receive an error message that says “You have to enter a non-blank value for all the boxes in Event 1”.

Activity or Event
 * At least one Activity or Event is required .

1. Interactive Presentation to Public. Face to Face In-Person.

Estimated Number of Attendees:

Estimated Persons Provided Enrollment Assistance:

2. Booth or Exhibit. At Heath Fair, Senior Fair, or Special Event.

Estimated Number of Direct Interactions with Attendees:

Estimated Persons Provided Enrollment Assistance:

3. Dedicated Enrollment Event Sponsored By SHIP or in Partnership.

Est Number Persons Reached at Event Regardless of Enroll Assistance:

Estimated Number Persons Provided Any Enrollment Assistance:

Estimated Number Provided Enrollment Assistance with Part D:

Estimated Number Provided Enrollment Assistance with LIS:

Estimated Number Provided Enrollment Assistance with MSP:

Estimated Number Provided Enrollment Assist Other Medicare Program:

4. Radio Show. Live or Taped. Not a Public Service Announce or Ad.

Estimated Number of Listeners Reached:

5. TV or Cable Show. Live or Taped. Not a Public Service Announce or Ad.

Estimated Number of Viewers Reached:

6. Electronic Other Activity. PSAs, Electronic Ads, Crawls, Video Conf, Web Conf, Web Chat

Est Persons Viewing or Listening to PSA, Electronic Ad, Crawl Across Entire Campaign, Video Conf, Web Conf, Web Chat:

7. Print Other Activity. Newspaper, Newsletter, Pamphlets, Fliers, Posters, Targeted Mailings

Est Persons Reading Article, Newsletter, Ad or Pieces of

Interactive Presentation to Public: Face-to-Face or In-person

This includes in-person presentations, interactive forums, speaking engagements, or seminars during which substantive knowledge on Medicare or the SHIP program is transferred by oral and visual means from a SHIP presenter to those individuals attending the presentation. This **does not** include SHIP counselor trainings, booths, exhibits, satellite broadcasts, or video and Web conferences.

Estimated number of attendees

Estimate the number of attendees by using sign-in sheets or by taking a rough head count of the number of people at the presentation, and enter the number in the box provided. Be careful not to enter excessively large attendance counts.

Estimated number of persons provided enrollment assistance

If any attendees received assisted with enrollment, enter the estimated number of people assisted into the box provided. If no attendees received assistance, record the numeric value “0” into the box.



If a SHIP counselor or coordinator assists a beneficiary with enrollment or provides other substantial one-on-one assistance during or after a PAM event, a Client Contact form should also be completed to collect as much information as possible about that counseling contact.

Booth or Exhibit: At Health Fair, Senior Fair, or Special Event

This includes events where general or program-specific information, and/or printed fact sheets are shared with or distributed to the public. The purpose of SHIP program participation in such events is to inform the public about the availability of SHIP services in their area. For example, some SHIPs attend health or senior fairs or set up information booths in shopping centers to increase that community’s awareness of their services and of the need for individual counseling.

Estimated number of direct interactions with attendees

Estimate the number of direct interactions by using a tick mark for each individual that approached your booth to take materials and/or speak with a SHIP representative. Enter the estimate in the box provided. Be careful not to enter excessively large attendance counts. Do not estimate the number of people potentially reached as the total number attending the particular health/senior fair unless you have reason to believe that each attendee approached the booth to take materials or spoke with a SHIP representative. Generally, most booths/exhibits reach a maximum of no more than 1,000 individuals per event day.

Estimated persons provided enrollment assistance

If any attendees received assistance with enrollment, enter the estimated number of people assisted into the box provided. If no attendees received assistance, record the numeric value “0” into the box.



If a SHIP counselor or coordinator assists a beneficiary with enrollment or provides other substantial one-on-one assistance during or after a PAM event, a Client Contact form should also be completed to collect as much information as possible about that counseling contact.

Dedicated Enrollment Event Sponsored by SHIP or in Partnership

This includes any type of program where enrollment is the key objective and where volunteers of staff are on hand to help the beneficiary submit an application online or by paper. An enrollment event may be either solely sponsored by a SHIP or sponsored in partnership with another organization such as Social Security Administration (SSA) office.

Estimated number of persons reached at event, regardless of enrollment assistance

Estimate the number of attendees at the event and enter the number in the box provided. Be careful not to enter excessively large attendance counts.

Estimated number of persons provided any enrollment assistance

If any attendees received assistance with enrollment, enter the estimated number of people assisted into the box provided. If no attendees received assistance, record the numeric “0” into the box.

Estimated number provided enrollment assistance with Part D

If any attendees received assistance specifically with Part D enrollment, enter the estimated number of people assisted into the box provided. If no attendees Part D enrollment assistance, record the numeric value “0” into the box.

Estimated number provided enrollment assistance with LIS

If any attendees received assistance specifically with LIS enrollment, enter the estimated number of people assisted into the box provided. If no attendees received LIS enrollment assistance, record the numeric value “0” into the box.

Estimated number provided enrollment assistance with MSP

If any attendees received assistance specifically with MSP enrollment, enter the estimated number of people assisted into the box provided. If no attendees received MSP enrollment assistance, record the numeric value “0” into the box.

Estimated number provided enrollment assistance with other Medicare program

If any attendees received assistance specifically with enrollment for another Medicare program (not Part D, LIS or MSP), enter the estimated number of people assisted into the box provided. If no attendees received assistance with other Medicare programs, record the numeric value “0” into the box.



If a SHIP counselor or coordinator assists a beneficiary with enrollment or provides other substantial one-on-one assistance during or after a PAM event, a Client Contact form should also be completed to collect as much information as possible about that counseling contact.

Radio Show: Live or Taped, Not a Public Service Announcement or Ad

This includes radio shows that are either live or taped. This option *does not* include a radio-based public service announcement (PSA) or an advertisement.

Estimated number of listeners reached

Estimate the number of listeners potentially reached for the original show only and record it in the box provided. Try to be as accurate as possible. For example, you can use an estimated audience size or potential number of listeners for this field.

TV or Cable Show: Live or Taped, Not a Public Service Announcement or Ad

This includes TV or cable TV shows that are either live or taped. This *does not* include TV/cable-based PSAs or advertisements.

Estimated number of viewers reached

Estimate the number of viewers potentially reached for the original show only and record it into the box provided. Try to be as accurate as possible. For example, you can use an estimated audience size or potential number of viewers for this field.

Electronic Other Activity: PSA, Electronic Ad, Crawls, Video Conference, Web Conference, Web Chat

This includes PSAs that are broadcast on the radio or aired on television, video and Web conferences, satellite broadcasts, electronic social media activities (e.g., Facebook, Twitter), or electronic billboards.

Estimated persons viewing or listening to PSA, electronic ad, crawl, video conference, Web conference, or Web chat across entire campaign.

Estimate the number of people potentially reached across the entire campaign. Try to be as accurate as possible.

Print Other Activity: Newspaper, Newsletter, Pamphlets, Flyers, Posters, Targeted Mailings

This includes PSAs that are mailed, targeted informational mailings, flyers, newspaper or newsletter articles, print ads on public transportation, or non-electronic billboards.

Estimated persons reading the article, newsletter, ad, pieces of targeted mail, or other printed material across entire campaign

For newspaper or newsletter articles, estimate the number of people potentially reached across the entire campaign. For example, you can estimate the potential number of readers. For mailings, you can estimate the number of pieces mailed.

* Start Date of Activity:	<input type="text" value="10/01/2010"/> 	* Event or Group Name:	<input type="text" value="Example Event"/>
* End Date of Activity:	<input type="text" value="10/01/2010"/> 	Contact First Name:	<input type="text" value="Jane"/>
* State of Event:	<input type="text" value="Marvland"/>	Contact Last Name:	<input type="text" value="Smith"/>
* County of Event:	<input type="text" value="Charles"/>	Contact Phone Number:	<input type="text" value="(555) 555-5555 x1___"/>
* Zip Code of Event:	<input type="text" value="20601"/>	* City of Event:	<input type="text" value="Cityville"/>
		* Street Address of Event:	<input type="text" value="10 Streetville Road"/>

Start Date of Activity (REQUIRED)

Use the calendar next to the box to select the start date of the activity or enter the date into the box using the mm/dd/yyyy format. For example, an event that took place on September 1, 2011 would be entered as 09/01/2011.

End Date of Activity (REQUIRED)

Use the calendar next to the box to select the start date of the activity or enter the date into the box using the mm/dd/yyyy format. If the activity took place on a single day, enter the same date into the start and end date boxes.

Event or Group Name (REQUIRED)

Enter the name of the PAM activity into the box provided.

Contact First Name and Last Name

In the corresponding boxes, enter the first and last name of the individual to contact for more information on the PAM activity.

Contact Phone Number

Enter the telephone number into the box provided. The number will be automatically formatted; therefore you do not need to use dashes or parentheses. You may include an extension if applicable.

State of Event (REQUIRED)

Your State will automatically appear in the State box. However, you can use the dropdown list to select another State (e.g., if the event took place in a neighboring State).

City of Event (REQUIRED)

Enter the city where the event took place, *not* the city of the SHIP office.

County of Event (REQUIRED)

Use the dropdown list to select the county in which the event took place, *not* the county of the SHIP office. The dropdown list will contain the names of all counties in the selected State.

Street Address (REQUIRED)

Enter the street address of the actual location where the event took place, *not* the central office location of the SHIP.

ZIP of Event (REQUIRED)

Use the dropdown list to select the ZIP code where the event took place. The dropdown list will contain all the ZIP codes within the selected county.

Topic Focus (REQUIRED, SELECT ALL THAT APPLY.)

This section lists numerous topics that may be discussed during the course of the PAM event. Record each topic that was covered by selecting the box provided next to that topic. If several topics were discussed during the activity, make sure to **select all the boxes that apply**. Topics selected should be those that received substantial attention during the event, not just those that were briefly mentioned. If a topic covered during the event is not present in this list, select the “Other Topics” option and enter the topic into the box provided below.

* Topic Focus (Check All That Apply)	* Target Audience (Check All That Apply)
<input checked="" type="checkbox"/> Medicare Parts A and B	<input checked="" type="checkbox"/> Medicare Pre-Enrollees - Age 45-64
<input type="checkbox"/> Plan Issues - Non-Renewal, Termination, Employer-COBRA	<input type="checkbox"/> Medicare Beneficiaries
<input type="checkbox"/> Long-Term Care	<input type="checkbox"/> Family Members - Caregivers of Medicare Beneficiaries
<input type="checkbox"/> Medigap - Medicare Supplements	<input type="checkbox"/> Low-Income
<input type="checkbox"/> Medicare Fraud and Abuse	<input type="checkbox"/> Hispanic, Latino, or Spanish Origin
<input type="checkbox"/> Medicare Prescription Drug Coverage - PDP / MA-PD	<input type="checkbox"/> White, Non-Hispanic
<input type="checkbox"/> Other Prescription Drug Coverage - Assistance	<input type="checkbox"/> Black or African-American
<input type="checkbox"/> Medicare Advantage	<input type="checkbox"/> American Indian or Alaska Native
<input type="checkbox"/> QMB - SLMB - QI	<input checked="" type="checkbox"/> Asian Indian
<input type="checkbox"/> Other Medicaid	<input type="checkbox"/> Chinese
<input type="checkbox"/> General SHIP Program Information	<input type="checkbox"/> Filipino
<input checked="" type="checkbox"/> Medicare Preventive Services	<input type="checkbox"/> Japanese
<input type="checkbox"/> Low-Income Assistance	<input type="checkbox"/> Korean
<input type="checkbox"/> Dual Eligible with Mental Illness Mental Disability	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Volunteer Recruitment	<input type="checkbox"/> Native Hawaiian
<input type="checkbox"/> Partnership Recruitment	<input type="checkbox"/> Guamanian or Chamorro
<input type="checkbox"/> Other Topics	<input type="checkbox"/> Samoan
Specify Other: <input type="text"/>	<input checked="" type="checkbox"/> Other Asian

Target Audience (REQUIRED, SELECT ALL THAT APPLY.)

This section lists several characteristics to describe target audiences of PAM events. Select all characteristics that describe the target audience by clicking in the box provided next to each applicable characteristic. If several of the options apply to the target audience, make sure to **select all boxes that apply**. If your event targeted audiences that are not present in the list, select the “Other Audiences” option and enter the type of audience into the box provided below.

Nationwide and CMS Special Use Field

National Special Use Fields authorized by CMS will be listed in this section. This field was previously used for states that used the NPR system to collect MIPPA data. Although MIPPA data is no longer being collected, CMS special use fields may be used in the future to collect other types of data.

State and Local Special Use Fields

Any field(s) authorized by your specific state will be listed here. Contact your agency director or SHIP Director if you have questions about these fields. If there are no fields listed here, your state does not use any special use fields.

Submit the PAM Form

Upon completing the PAM form, click “Submit” at the bottom of the screen to save the record. A message will appear at the top of the page that says the form was successfully submitted. **If a success message does not display, the PAM form was not saved.** If an error was made while completing the form, you will receive an error message in red when you click “Submit”. The error message will say “Validation error has occurred. Please scroll up and fix the error.” Scroll up the page to see a description of the error message in red, next to the field in which the error was made. Fix the error(s) and resubmit the form by clicking the “Submit” button at the bottom of the page.

CHAPTER 4

RESOURCE REPORT FORM

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Resource Report Form Overview

What is a Resource Report?

A **Resource Report** allows a state SHIP Director to report data on SHIP counselors, coordinators, and staff within their state.

Who submits a Resource Report form? How often must the form be completed?

Each SHIP Director must submit a Resource Report form by May 31, for the reporting period April 1 – March 31. Resource Report forms can be completed only by using the SHIPtalk NPR website (commonly referred to as the SHIP NPR website). Unlike the Client Contact and PAM forms, Resource Report forms cannot be uploaded using a proprietary data system.



Local agencies will not be able to submit a Resource Report form into the SHIP NPR website. The state SHIP office is responsible for consolidating any local agency Resource Report information into one single state-level Resource Report form, and for submitting this form into the SHIP NPR website.

What should I know before completing a Resource Report form?

It is important to be familiar with the following definitions before filling out a Resource Report form.

Active counselor: Individuals who provided counseling, information, or assistance related to Medicare or other health insurance for a SHIP during the 12-month reporting period. Active counselors include any temporary counselors or other counselors trained to provide assistance on specific topics (e.g., Medicare prescription drug coverage). These counselors may not have received the full initial training required for new SHIP counselors, but *must* be a SHIP registered counselor (they have signed some type of Counselor Agreement or Memorandum of Understanding (MOU) with the SHIP and they have signed a Confidentiality Agreement).



Do not count counselors who did not provide counseling during the reporting period, even if they were trained.

Coordinator or sponsor: An individual at a local or field who may do one or more of the following:

- Recruits, trains, supervises, or meets with counselors
- Provides administrative support (e.g., schedules meetings, provides travel reimbursements)
- Publicizes the SHIP program
- Oversees data reporting
- Distributes informational materials
- Conducts public and media activities such as presentations or health fairs



Do not include individuals/organizations who:

- Only provide meeting or office space
- Contribute no time to the SHIP program
- Provide the same services as a SHIP coordinator for another similar program that is not considered part of the SHIP program

Counselor hours: The total number of hours the counselors contributed to the SHIP program counseling or working directly on behalf of clients.

This includes the total number of hours spent on the following activities to resolve clients' issues:

- counseling,
- researching,
- referring,
- advocating (calling agencies on the client's behalf),
- trying to reach the client,
- waiting to meet with a client,
- traveling,
- preparing materials to send to the client, and
- completing paperwork/forms to report the client contact.

In-kind 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 MOU. They received compensation for their time and services from a program other than SHIP.

Local and field sites: Locations outside the state SHIP office where counselors, coordinators/sponsors, other SHIP staff, or volunteers may be based and/or provide counseling. A local/regional SHIP program may serve one or more cities/counties and may be located in a local hospital, Retired Seniors Volunteer Program (RSVP), senior center, Area Agency on Aging, Senior Information and Referral program, senior legal services program, library, or an independent nonprofit agency. Counselors (volunteer or paid) and other personnel who are based in these local or field sites should be counted in the "All Other Local and Field Sites" columns in *Section 1 Number of Active Counselors and Hours as of March 31* and *Section 3 Number of Other Paid and Volunteer Staff and Hours as of March 31* of the Resource Report form.

Other volunteer staff: Volunteers who 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.

Other paid staff: 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.

SHIP-paid counselors: The number of individuals who:

- provided SHIP counseling hours during the reporting period, AND
- received any compensation for their time and services from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

State SHIP office: The central office for the SHIP program, where the state SHIP director, trainers, administrative staff, and/or state toll-free Help Desk counselors are usually based. These personnel provide counseling to clients from the entire state, not necessarily from only one area or region of the state. Counselors (volunteer or paid) and other personnel who are based in the state office should be counted in the “State Office” columns in *Section 1* and *Section 3* of the Resource Report form.

Volunteer counselors: The number of individuals who 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.

Open a Resource Report Form

You must be logged in to the SHIP NPR website (<https://shipnpr.shiptalk.org>) to enter a Resource Report form.

Once you log in to the SHIP NPR website, click on the light blue “RR” button at the top of the screen. This directs you to the “Search Resource Report” screen (see below).

This screen allows you to complete the following tasks:

- A. [Add a New Resource Report Form](#)
- B. [Look up a Previous Resource Report Form](#)
- C. [Edit a Previously Entered Resource Report Form](#)
- D. [Delete a Resource Report Form](#)

A. Add a New Resource Report Form

Once you log in to the SHIP NPR website, click on the light blue “RR” button at the top of the screen. This directs you to the “Search Resource Report” screen.



If you receive an “Unauthorized access” message when you click on the “RR” button, your SHIP NPR account was not given the necessary level of permissions to fill out a Resource Report forms. Only the state SHIP Director and state administrators can submit Resource Report forms.

To enter a new Resource Report form, click on the “Enter Year” dropdown menu and select the year for which you wish to enter a Resource Report. For example, to fill out a form for April 2011 through March 2012, select “2011”. Next, click the “Add Resource Report” button located at the right side of the webpage. This directs you to a new Resource Report form.

B. Look Up a Previous Resource Report Form

Once you log in to the SHIP NPR website, click on the light blue “RR” button at the top of the screen. This directs you to the “Search Resource Report” screen.

To locate a previous Resource Report form for your state, click on the “Enter Year” dropdown menu and select the year for which you want to search. For example, if you want to view the Resource Report that was submitted for the period April 2010 through March 2011, you would select “2010” in the dropdown menu. Next, click the “Search” button. The result(s) will display below.

When you locate the Resource Report, click on the link underneath “Report Year” if you want to view the record but not make any changes to it.

C. Edit a Previous Report Form

Once you log in to the SHIP NPR website, click on the light blue “RR” button at the top of the screen. This directs you to the “Search Resource Reports” screen.

Occasionally, a SHIP Director or state administrator may need to edit a previously submitted Resource Report form. For example, you may need to modify a record if you discover that something was incorrectly entered. You may edit the form before the May 31 deadline. If you need to modify the Resource Report form after the deadline due to an error or missing data, contact the SHIP NPR Help Desk for guidance.

To edit a previously submitted Resource Report form, you must first locate it using the instructions in [Look up a Previous Resource Report Form](#). Once you locate the record, click the “Edit” link next to the record. This directs you to the previously entered form. Once you make changes to the form, scroll to the bottom of the form and click “Save”. The submitted form will display on the next screen.

D. Delete a Resource Report Form

Once you log in to the SHIP NPR website, click on the light blue “RR” button at the top of the screen. This directs you to the “Search Resource Reports” screen.

Occasionally, a SHIP Director or state administrator may wish to delete a previously submitted Resource Report form. This may occur if a duplicate form is submitted accidentally or if it is discovered prior to the May 31 reporting deadline that a previously submitted form contains a large amount of incorrect data and it would take longer to edit it than it would to fill out a new form.

To delete a previous Resource Report form, you must first locate it using the instructions in [Look up a Previous Resource Report Form](#). Once you locate the record, click the “Delete” link next to the record. The following message will display in red on the screen: “Report has successfully been deleted”. Once a form is deleted, it cannot be retrieved.

Fill Out a Resource Report Form

An item marked with an * indicates a required field.



SHIP state health insurance assistance programs
Local Help for People with Medicare.

SHIPtalk

Agency User EditMyProfile RR CC PAM Upload SHIPProfile NPRReports Logout

RESOURCE REPORT

Complete Only One RR Form for the Entire State. Do Not Submit Sponsoring-Agency-Level or Within-State-Regional Resource Reports. All Person Counts Should Reflect Active Counselors, Coordinators, Other Staff as of the End of Each Grant Year (31 March).

12 Month Period for This Report
From: 2015 To: 2016

State Code
24

State Grantee Name

Person Completing Report
OLD NPR DATA - NOT A

Title

Telephone Number
999-999-9999

12 Month Period for This Report

The dropdown menus will automatically display the beginning and end year of the annual reporting period. You can use the dropdown menus to select a different period if they are incorrect.

State Code

The code for your state will automatically display in this field.

State Grantee Name

Enter the name of the state SHIP office in this box.

Person Completing the Report

Your first and last name will automatically display in this box.

Title

Enter your title in this box.

Telephone Number

Your phone number will automatically display in this box.

Section 1 – Number of Active Counselors and Hours as of March 31

Section 1 Number of Active Counselors And Hours As of 31 March			
	State Office	All Other Local and Field Sites	Total
A. Number of Volunteer Counselors	<input type="text"/>	<input type="text"/>	<input type="text"/>
B. Number of SHIP-Paid Counselors	<input type="text"/>	<input type="text"/>	<input type="text"/>
C. Number of In-Kind-Paid Counselors	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Number of Counselors - A+B+C	<input type="text"/>	<input type="text"/>	<input type="text"/>
D. Volunteer Counselor Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>
E. SHIP-Paid Counselor Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>
F. In-Kind-Paid Counselors Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Counselors Hours - D+E+F	<input type="text"/>	<input type="text"/>	<input type="text"/>



Refer to [What should I know before completing a Resource Report form?](#) for the definition of “active counselor”.

Enter values for rows A, B, C, D, E, and F into the first two columns for “State Office” and “All Other Local and Field Sites”. The “Total” column and “Total” rows will calculate automatically. All fields are required. The numeric value “0” is an acceptable entry.

The number of individuals working or volunteering for a SHIP may be counted more than once since some coordinators or staff also provides counseling. If this is the case, include these individuals in both the counselor section (*Section 1- rows A, B, C*) and the coordinator section (*Section 2- rows A, B, C*). **It is important that you do not double count their hours** by mistakenly including total hours in both *Section 1* (rows *D, E, or F*) and *Section 2* (rows *D, E, or F*). Estimate the hours an individual provides toward counseling separate from the hours spent on other tasks such as coordinating a program.

Example: If an individual spends 8 hours per week counseling and the remaining 32 hours per week performing SHIP coordinator functions:

Section 1 (rows *D, E, or F*) = 416 hours (8 hours x 52 weeks)

Section 2 (rows *D, E, or F*) = 1664 hours (32 hours x 52 weeks)

A. Number of Volunteer Counselors (REQUIRED)

This refers to the number of individuals who:

- Provided SHIP counseling during the reporting period; **AND**
- Were registered volunteer counselors. They have signed some type of Counselor Agreement or MOU and Confidentiality Statement); **AND**
- Did not receive paid compensation for their time or services but may have received travel reimbursement

Volunteer counselors can also include local/area coordinators/sponsors if they provided SHIP counseling **AND** were not paid by the SHIP.

B. Number of SHIP Paid Counselors (REQUIRED)

This refers to the number of individuals who:

- Provided SHIP counseling during the reporting period; **AND**
- Received any compensation for their time and services from the SHIP, regardless of whether their salary was funded by CMS, the state, or some other funding agency

Examples of SHIP paid counselors include state project directors, receptionists, telephone operators, and paid local/regional coordinators/sponsors, as long as they provided counseling during the reporting period as part of their normal duties.

C. Number of In-kind Paid Counselors (REQUIRED)

This refers to the number of individuals who:

- Provided SHIP counseling during the reporting period; **AND**
- Were registered SHIP counselors who have signed some type of Counselor Agreement or MOU and Confidentiality Statement; **AND**
- Received compensation for their time and services from a program other than SHIP

Examples of in-kind paid counselors include RSVP staff, hospital staff, senior center staff, Senior Information and Referral Staff, Area Agency on Aging staff and outreach social workers, who may or may not also be local/regional coordinators/sponsors.

D. E. F. Counselor Hours (Volunteer, SHIP Paid, In-kind) (REQUIRED)

Use the corresponding boxes (*D*, *E*, *F*) to record the number of hours that the SHIP counselors (volunteer, SHIP-paid, and in-kind counselors) contributed to SHIP program counseling or to working directly on behalf of clients. This includes the total number of hours spent on the following activities to resolve clients' issues:

- Counseling
- Researching
- Referring
- Advocating (calling agencies on the client's behalf)
- Attempts to reach the client that result in a successful contact
- Waiting to meet with a client
- Travel time to the client
- Preparing materials to send to the client
- Collecting paperwork/forms to report the client contact

Section 2 – Number of Local Coordinators/Sponsors and Hours as of March 31

Section 2	
Number of Local Coordinators / Sponsors and Hours As of 31 March	
	Total
A. Number of Volunteer (Unpaid) Coordinators	<input type="text"/>
B. Number of SHIP-Paid Coordinators	<input type="text"/>
C. Number of In-Kind-Paid Coordinators	<input type="text"/>
Total Number of Coordinators - A+B+C	<input type="text"/>
D. Volunteer (Unpaid) Coordinator Hours	<input type="text"/>
E. SHIP-Paid Coordinator Hours	<input type="text"/>
F. In-Kind-Paid Coordinator Hours	<input type="text"/>
Total Coordinator Hours - D+E+F	<input type="text"/>



Refer to [What should I know before completing a Resource Report form?](#) for the definition of “active counselor”.

Enter values for rows A, B, C, D, E, and F. The “Total” row will calculate automatically. All fields are required. The numeric value “0” is an acceptable entry.

The number of individuals working or volunteering for a SHIP may be counted in more than one section since some coordinators or staff also provides counseling. For example, if an individual provides counseling, he or she can be counted in *Section 1- Number of Active Counselors and Hours as of March (Section 1- rows A, B, and C)* and *Section 2 Number of Local Coordinators/Sponsors and Hours as of March 31 (Section 2- rows A, B, and C)*. **It is important that you do not double count their hours** by mistakenly including total hours in both *Section 1 (rows D, E, or F)* and *Section 2 (rows D, E, or F)*. Estimate the hours an individual provides toward counseling separate from the hours spent on other tasks such as coordinating a program.

Example: If an individual spends 8 hours per week counseling and the remaining 32 hours per week performing SHIP coordinator functions:

Section 1 (rows *D, E, or F*) = 416 hours (8 hours x 52 weeks)

Section 2 (rows *D, E, or F*) = 1664 hours (32 hours x 52 weeks)

A. Number of Volunteer (Unpaid) Coordinators (REQUIRED)

This refers to the number of individuals who:

- Performed the SHIP coordinator functions defined earlier; **AND**
- Did not receive compensation for their time and services (they may have received travel reimbursement).

B. Number of SHIP Paid Coordinators (REQUIRED)

This refers to the number of individuals who:

- Performed the SHIP coordinator functions defined earlier; **AND**
- Received compensation for their time from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

C. Number of In-Kind Paid Coordinators (REQUIRED)

This refers to the number of individuals who:

- Performed the SHIP coordinator functions defined earlier **AND**
- Received compensation from a program other than SHIP

Examples of in-kind paid coordinators include RSVP paid staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers.

D. Volunteer (Unpaid) Coordinator Hours (REQUIRED)

This refers to the total number of hours the volunteer (unpaid) coordinators (counted in row *A*) contributed to the SHIP program while performing the functions of a coordinator, as defined earlier.

E. SHIP Paid Coordinator Hours (REQUIRED)

This refers to the total number of hours the SHIP-paid coordinators (counted in row *B*) contributed to the SHIP program while performing the functions of a coordinator as defined earlier.

F. In-kind Paid Coordinators Hours (REQUIRED)

This refers to the total number of hours that the in-kind paid coordinators (counted in row *C*) contributed to the SHIP program while performing the functions of a coordinator as defined earlier.

Section 3 – Number of Other Paid and Volunteer Staff and Hours as of March 31

Section 3 Number of Other Paid and Volunteer Staff And Hours As of 31 March			
	State Office	All Other Local and Field Sites	Total
A. Number of Volunteer Other Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
B. Number of SHIP-Paid Other Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
C. Number of In-Kind-Paid Other Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Number of Other Staff - A+B+C	<input type="text"/>	<input type="text"/>	<input type="text"/>
D. Volunteer Other Staff Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>
E. SHIP-Paid Other Staff Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>
F. In-Kind-Paid Other Staff Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Other Staff Hours - D+E+F	<input type="text"/>	<input type="text"/>	<input type="text"/>



Refer to [What should I know before completing a Resource Report form?](#) for the definition of “active counselor”.

Enter values for rows A, B, C, D, E, and F into the first two columns for “State Office” and “All Other Local and Field Sites”. The “Total” column and “Total” rows will calculate automatically. All fields are required. All fields are required. The numeric value “0” is an acceptable entry.

A. Number of Volunteer Other Staff (REQUIRED)

This refers to the number of individuals who

- Performed the functions of other volunteer staff (as defined earlier); **AND**
- Did not receive compensation for their time and services. They may have received travel reimbursement.

Examples of other volunteer staff include volunteers who assisted with data entry, marketing or administrative duties, or served as receptionists, and trainers.

B. Number of SHIP Paid Other Staff (REQUIRED)

This refers to the number of individuals who:

- Performed the functions of other paid staff (as defined earlier); **AND**
- Received compensation for their time and services from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency

Examples of other SHIP 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.

C. Number of In-kind Paid Other Staff (REQUIRED)

This refers to the number of individuals who:

- Performed the functions of other paid staff defined earlier; **AND**
- Received compensation for their time and services by a program other than SHIP

Examples of in-kind paid other staff include RSVP paid staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers.

D. Volunteer Other Staff Hours (REQUIRED)

This refers to the total number of hours that the volunteer other staff (counted in row A) contributed to the SHIP program in activities defined in [What should I know before completing a Resource Report form.](#)

E. SHIP Paid Other Staff Hours (REQUIRED)

This refers to the total number of hours that the SHIP-paid other staff (counted in row B) contributed to the SHIP program in activities defined in [What should I know before completing a Resource Report form.](#)

F. In-kind Paid Other Staff Hours (REQUIRED)

This refers to the total number of hours that the in-kind paid other staff (counted in row C) contributed to the SHIP program in activities defined in [What should I know before completing a Resource Report form.](#)

Section 4 – Counselor Trainings

Section 4 Counselor Trainings		Total
A. Number of Initial Trainings for New SHIP Counselors		<input type="text"/>
B. Number of New SHIP Counselors Attending Initial Trainings		<input type="text"/>
C. Total Number of Counselor Hours in Initial Trainings		<input type="text"/>
D. Number of Update Trainings for SHIP Counselors		<input type="text"/>
E. Number of SHIP Counselors Attending Update Trainings		<input type="text"/>
F. Total Number of Counselor Hours in Update Trainings		<input type="text"/>

Enter values for rows A, B, C, D, E, and F. All fields are required. The numeric value “0” is an acceptable entry.

A. Number of Initial Trainings for New SHIP Counselors (REQUIRED)

This refers to the total number of initial training sessions held throughout the state during the annual reporting period for new counselors (including volunteer or paid counselors). Initial trainings that last several days should be counted as one training.

Example: If 20 local sites in the state conduct one initial training each during the annual reporting period, you would report 20 trainings in the box provided. If 4 local sites hold 2 initial trainings each, you would report 8 initial trainings.

B. Number of New SHIP Counselors Attending Initial Trainings (REQUIRED)

This refers to the total number of new counselors (including volunteer or paid counselors) who attended an initial training session for new counselors.

C. Total Number of Counselor Hours in Initial Trainings (REQUIRED)

To calculate this number, multiply the number of counselors who attended initial training (counted in row *B*) with the number of hours of the initial training session.

Example: If 10 counselors attended a 2-day initial training session (totaling 16 hours), report 160 total counselor hours ($10 \times 16 = 160$) in initial training.

D. Number of Update Trainings for SHIP Counselors (REQUIRED)

This refers to the total number of update training sessions held throughout the state during the annual reporting period for counselors (including volunteer and paid counselors). An update training includes regular meetings or training sessions during which counselors are given updates on topics including but not limited to: Medicare changes, health insurance plan choices, counselor skills development, and SHIP program procedures. Update trainings that last several days should be counted as one training.

Example: If 20 local sites in the state conduct 1 update training each during the annual reporting period, you would report 20 update trainings. If 4 local sites hold 2 update trainings each, you would report 8 update trainings.

E. Number of SHIP Counselors Attending Update Trainings (REQUIRED)

This refers to the total **unduplicated** number of counselors (including volunteer and paid counselors) who attended at least one update training during the full 12-month reporting period. Do not count a counselor more than once, even if he or she attended multiple update trainings. The number entered in this field cannot exceed the total number of counselors for the state.

F. Total Number of Counselor Hours in Update Trainings (REQUIRED)

To calculate this number, multiply the number of counselors who attended update training (counted in row *E*) with the number of hours of the update training session.

Example: If 10 counselors attend a 2-hour update training session, you would report 20 total counselor hours in update training ($10 \times 2 = 20$). If 3 meetings are held, during which you spend 30 minutes on updates, and 10 counselors attend each meeting, you would report 15 counselor hours in update training ($3 \times 0.5 \text{ hours} \times 10$ OR $10 \times 1.5 \text{ hours} = 15$).

Section 5 – Number of Total Active Counselors (SHIP-Paid, In-Kind Paid, and Volunteer) with the Following Characteristics

Section 5					
Number of Total Active Counselors (SHIP-Paid, In-Kind-Paid and Volunteer Counselors) with the Following Characteristics					
Years of SHIP Service		Counselor Race - Ethnicity		Counselor Disability	
Less Than 1 Year	<input type="text"/>	Hispanic, Latino, or Spanish Origin	<input type="text"/>	Disabled	<input type="text"/>
1 Year Up to 3 Years	<input type="text"/>	White, Non-Hispanic	<input type="text"/>	Not Disabled	<input type="text"/>
3 Years Up to 5 Years	<input type="text"/>	Black, African American	<input type="text"/>	Not Collected	<input type="text"/>
More Than 5 Years	<input type="text"/>	American Indian or Alaska Native	<input type="text"/>	Counselor Speaks Another Language	
Not Collected	<input type="text"/>	Asian Indian	<input type="text"/>	Language Other than English	<input type="text"/>
Counselor Age		Chinese	<input type="text"/>	English Speaker Only	<input type="text"/>
Less Than 65 Years of Age	<input type="text"/>	Filipino	<input type="text"/>	Not Collected	<input type="text"/>
65 Years or Older	<input type="text"/>	Japanese	<input type="text"/>		
Not Collected	<input type="text"/>	Korean	<input type="text"/>		
Counselor Gender		Vietnamese	<input type="text"/>		
Female	<input type="text"/>	Native Hawaiian	<input type="text"/>		
Male	<input type="text"/>	Guamanian or Chamorro	<input type="text"/>		
Not Collected	<input type="text"/>		<input type="text"/>		

Use this section to record data on characteristics for all active counselors who were counted in *Section 1* of the Resource Report form. Be sure to use the “Not Collected” boxes under each characteristic to record the number of counselors for whom information on specific characteristics is not known.

If the totals for a characteristic block are too low compared to the total counselor count in *Section 1*, an error message will appear at the top of the data entry screen that tells you where the error occurred. All error messages must be corrected before you can submit the Resource Report form.

Years of SHIP Service (REQUIRED)

Use the corresponding boxes to record the number of counselors who—at the end of the 12-month reporting period—had participated in the SHIP program for less than 1 year, 1 to 3 years, 3 to 5 years, and over 5 years, as well as the number of counselors for whom this information is not known (Not Collected).

Counselor Age, Gender, Race/ethnicity, Disability Status, Language (REQUIRED)

Use the corresponding boxes to record the number of counselors with each characteristic, as well as the number of counselors for whom this information is not known (Not Collected).



The number of counselors with each characteristic plus the number for whom this information is not known (not collected) should equal the total number of counselors recorded in *Section 1 Number of Active Counselors and Hours as of March 31* of the Resource Report form. This includes any individuals who provided counseling (volunteers, staff paid by SHIP, or in-kind staff), who may or may not have also performed other duties for the SHIP (e.g., coordinator, project director, trainer, and receptionist.).

Save the Resource Report Form

Upon completing the Resource Report form, click “Save” at the bottom of the form to save the record. When you successfully save the form, the saved record will display on the screen. If you need to edit the Resource Report form that you just saved, click the “Edit” button located to the right of the page.

It is especially important that the total number of counselors entered within each characteristic block in *Section 5* add up to the total number of counselors entered in *Section 1*. If the totals do not match, you will receive an error message when you click “Save”. Error messages will display at the top of the screen and will indicate where the error(s) occurs. Fix the error(s) and resave the form by clicking the “Save” button at the bottom of the page.

CHAPTER 5

AGENCIES & NPR REPORTS

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Agency

This chapter explains the various functionalities under the “Agency” tab in the SHIP NPR website (<https://shipnpr.shiptalk.org>). These functionalities include creating and managing listings for agencies and sub-state regions within a state.

I. AGENCIES

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen. Only SHIP Directors and state administrators can access the “Agency” tab. If you receive an “unauthorized access” message when you click on the tab, you do not have the necessary level of permissions.



The “Find an Agency” screen allows you to complete the following tasks:

- A. [View Existing Agencies Within the State](#)
- B. [Add an Agency](#)
- C. [Edit an Agency](#)
- D. [Inactivate an Agency Listing](#)
- E. [Delete an Agency Listing](#)

A. View Existing Agencies Within the State

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen.

Administrators can view an alphabetical list of all agencies within the state by clicking on the “List all Agencies” link on the right side of the screen. Alternatively, the search box allows administrators to search for an agency by using keywords (e.g., aging) in the agency’s name. In addition to the agency’s name, the following information displays:

- Agency type (e.g., referral telephone line)
- Address
- Telephone number and hours (if available)

Administrators can click on “View” for additional details including active counties, service areas, contact information for the agency director, and the website address.

B. Add an Agency

Register a new Agency

(Items marked in * indicate required fields.)

* State:

* Agency Name:

* Agency Type:

* Service Areas:

Counties	Service Areas
<ul style="list-style-type: none"> Allegany Anne Arundel Calvert Caroline Carroll Cecil Charles Dorchester Frederick 	<ul style="list-style-type: none"> Baltimore

Instructions for Administrators: Add an Agency

1. Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen.
2. Click on the link to “Add an Agency” located at the upper right hand side of the screen. Use the following instructions to register a new agency within their state. An item marked with an * indicates a required field.

State – This field is pre-populated to display your state.

Agency Name – Enter the name of the agency into the box.

Agency Type – Use the dropdown list to select one of the following options:

- Statewide call center
- Information and referral phone line
- Other call center
- Other statewide operations and activities
- Sub-state regional office
- Local agency

Service Areas – This field allows you to select which counties are served by the agency. The “Counties” box located on the left will display all the counties within your state. In this box, locate the county that is served by the agency and click on it to highlight the name. Click on the >> button to move the highlighted county into the “Service Areas” box on the right. Repeat this process for all counties served by the new agency. To select multiple counties at once, press the “Ctrl” button on your keyboard before clicking on the

names of the desired counties. If you accidentally select and move a county into the “Service Areas” box, you can undo it by clicking on the county to highlight it, and clicking on the << button.

Physical Address (REQUIRED) – Enter the address of the agency office into the corresponding boxes.

Mailing Address (REQUIRED) – If the agency’s mailing address is the same as its physical address, click on the “same as physical address” box. If the agency’s mailing address is different than its physical address, enter the mailing address into the corresponding boxes.

Contact Person (REQUIRED) – Enter the first name, last name, and title of the agency’s contact person (e.g., agency director or administrator) into the corresponding boxes.

Hours of Operation – Enter the hours of operation for the agency.

Primary Phone (REQUIRED) – Enter a phone number that individuals may use to contact the agency.

Secondary Phone – Enter a second contact phone number, if available.

Primary Email (REQUIRED) – Enter an email address that individuals may use to contact the agency.

Secondary Email – Enter a second contact email address, if available.

Toll Free Phone – Enter a toll free phone number for the agency, if available.

TDD – Enter the TTD or TTY device number, if available.

Toll Free TDD – Enter the toll free TTD or TTY device number, if available.

Fax – Enter the agency’s fax number.

Website URL – Enter the agency’s website address, if available.

Comments – You may include relevant information about the agency and its services.

Hide Agency From Public – If you do not wish to share the agency’s information with the public, click the box next to “Hide Agency From Public”.

3. Once you have completed the agency registration form, click the “Submit” button at the bottom of the screen to save the agency’s information.
4. A success message will display stating, “Success! This Agency has been successfully added.” The details of the newly created agency will display underneath the success message. Below the agency name, you will see an “Edit” button that you can use to modify the agency’s information, as well as a “Delete” button that you can use to delete the agency’s information.

C. Edit an Agency

To edit an agency, locate the agency using the instruction in [View Existing Agencies Within the State](#). Once you locate the agency, click “Edit” next to the agency to be directed to the agency listing. After you make changes to the agency information, scroll to the bottom of the page and

click “Submit” to save your changes. A message will appear at the top of the page that says “Success! This Agency has successfully been edited.”

D. Inactivate an Agency Listing

To inactivate an agency, locate the agency using the instructions in [View Existing Agencies Within the State](#). Once you locate the agency, click “Edit” next to the agency to be directed to the agency listing. Click in the “Is Active” box to uncheck it. Scroll to the bottom of the page and click “Submit” to save your changes. A message will appear at the top of the page that says “Success! This Agency has successfully been edited.”

Changing the status of an agency to “inactive” does not delete the agency’s information from SHIP NPR, but will prevent users from registering at the site.

E. Delete an Agency Listing

To delete an agency, locate the agency using the instruction in [View Existing Agencies Within the State](#). Once you locate the agency, click on “View” to display the agency’s information. At the right side of the screen, you will see an “Edit” and a “Delete” button. Upon clicking on the “Delete” button, you will see a message that says “Are you sure you would like to delete this agency and all of its locations?” Select “Yes” to delete the agency. Deleting an agency listing will delete the agency’s listing in the SHIP NPR website.

II. SUB-STATE REGIONS

A sub-state region consists of a grouping of specific agencies within a state. Sub-state regions may be physical offices that oversee a group of agencies within a particular geographic area, or an administrative grouping of agencies created by the SHIP Director and state administrators to help with management and oversight of those agencies. The “Agency” section of the SHIP NPR website allows administrators to manage their state’s sub-state regions.

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the screen. This directs you to the “Find an Agency” screen. Only SHIP Directors and state administrators can access the “Agency” tab. If you receive an “unauthorized access” message when you click on the tab, you do not have the necessary level of permissions.

The “Find an Agency” screen allows you to complete the following tasks:

- A. [Add a Sub-State Region](#)
- B. [View, Edit, or Delete a Sub-State Region](#)
- C. [Inactivate a Sub-State Region Listing](#)

A. Add a Sub-State Region

SHIP Directors and state administrators may wish to create or designate sub-state regions for their state. Adding a sub-state region within the “Agency” tab creates a sub-state agency to which individuals can register as a user and report information on the Client Contact (CC) and Public and Media (PAM) Activity forms.



Adding a sub-state region within the “Agency” tab of the SHIP NPR website is different than adding a sub-state region for reporting purposes within the “NPR Reports” tab, which is discussed in the section, [Add a Sub-State Region for Reporting Purposes](#). A sub-state region for reporting purposes allows you to run reports that aggregate Client Contact or PAM forms for the sub-state regions that you created.

Add a Sub-State Region

(Items marked in * indicate required fields.)

State:

* Sub-State Region Name:

* Sub-State Region Agencies:

Agencies		Sub-State Region Agencies
<div style="border: 1px solid gray; padding: 5px;"> <ul style="list-style-type: none"> Allegany County Hun ▲ Anne Arundel County Baltimore City Health Baltimore County De Calvert County Office Carroll County Burea Cecil County Aging S Charles County Agin Frederick County De Garrett County Area . ▼ </div>	<input type="button" value=">>"/> <input type="button" value="<<"/>	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>

Sub-State Regions

Name	State	
Test MD Sub-State Region	Maryland	View Edit

Instructions for Administrators: Add a Sub-State Region

1. Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the page. This directs you to the “Find an Agency” screen.
2. Click on the link to “Add a Sub-State Region” located at the upper right hand side of the screen. Any sub-state regions that already exist for your state will be displayed at the bottom of the following screen. Use the following instructions to add a new sub-state region.

State – This field is pre-populated to display your state.

Sub-State Region Name – Assign a name to the sub-state region.

Sub-State Region Agencies – This field allows you to select which agencies you want to include in the sub-state region. The “Agencies” box on the left will display all the agencies within your state. In this box, locate the first agency you wish to include in the new sub-state region and click on it to select it. Click on the >> button to move the highlighted agency into the “Sub-State Region Agencies” box on the right. Repeat this process for the other agencies you wish to include in the new sub-state region. To select multiple agencies at once, press the “Ctrl” button on your keyboard before clicking on the

names of the desired agencies. If you accidentally select and move an agency into the “Sub-State Region Agencies” box, you can undo it by clicking on the agency to highlight it, and clicking on the << button.

3. When all desired agencies have been added to the “Sub-State Region Agencies” box, click the “Submit” button.
4. A success message will display stating, “Success! This Sub-State Region has been successfully added.” The details of the newly created sub-state region, such as the names of the agencies it comprises, will display underneath the success message. You will see an “Edit” button that you can use to make modifications to the sub-state region, as well as a “Delete” button that you can use to delete the sub-state region.

B. View, Edit, or Delete a Sub-State Region Listing

Once you log in to the SHIP NPR website, click on the light blue “Agency” button at the top of the page. This directs you to the “Find an Agency” screen. Click on the link to “Add a Sub-State Region” located on the upper right hand side of the screen. Any sub-state regions that already exist for your state will be displayed at the bottom of the following screen. Click “Edit” next to a region name to edit that sub-state region, and click “Submit” to save your changes. Click “View” next to a region name to view the details of that sub-state region.

If you click on “View”, you will also see “Edit” and “Delete” buttons on the following screen that displays the details of the sub-state region. You may use these buttons to edit or delete the region as necessary.

C. Inactivate a Sub-State Region Listing

To inactivate a sub-state region, locate the sub-state region using the instructions in [View, Edit, or Delete a Sub-State Region Listing](#). Once you locate the sub-state region, click “Edit” next to the region’s name to be directed to the sub-state region’s listing. Click in the “Is Active” box to uncheck it. Scroll to the bottom of the page and click “Submit” to save your changes. A message will appear at the top of the page that says “Success! This Sub-State Region has successfully been edited.”

Changing the status of a sub-state region to “inactive” does not delete the sub-state region’s information from SHIP NPR, but will prevent users from registering at the site.

NPR Reports

This chapter explains the various functionalities under the “SHIP NPR Reports” tab in the SHIP NPR website (<https://shipnpr.shiptalk.org>). These functionalities include using NPR reports, such as the Client Contact, PAM, and Sub-State Region summary reports.

What are the different types of NPR reports?

Summary reports provide aggregate-level data from Client Contact or Public and Media (PAM) Activity forms that were submitted into the SHIP NPR website.

- A Client Contact summary report displays a cumulative report on client contacts made within a specific time period, organized by agency, county, ZIP code, counselor, submitter, sub-state region, or state.
- A PAM summary report displays a cumulative report for all PAM events held within a specific time period, organized by agency, county, ZIP code, presenter/contributor, submitter, sub-state region, or state.
- A Sub-State Region report is a type of summary report that provides an aggregated count of Client Contact or PAM forms for specific predetermined areas within a state, such as a group of counties, ZIP codes, or agencies.

Who can run NPR reports?

All users can run NPR reports. However, an individual's user role and level of permissions will determine which types of NPR reports he/she can run. For example, an agency user may be able to run reports only on the forms he or she entered. An agency administrator may be able to run reports on all forms entered by individuals at the agency. SHIP Directors and state administrators can run statewide reports and reports on forms entered by individuals, agencies or sub-state regions.

How are Sub-State Region reports different from other summary reports?

A Sub-State Region report displays a summary report of Client Contact or PAM forms for predetermined groupings within a state, such as groupings of counties, ZIP codes, or agencies. Sub-State Region reporting provides a level of geographic reporting between the existing state-level summary reports and the summary reports based on single agencies, counties, or ZIP codes. While Sub-State Region reports resemble the Client Contact and PAM summary reports, they contain specific information from groupings of agencies, counties, or ZIP codes. For example, a single Sub-State Region report can contain client contact information from multiple agencies. While this information can be obtained by running individual client contact reports for each agency and manually adding the totals, the Sub-State Region Report allows a user to obtain this information more easily.

Who can run Sub-State Region reports?

Only SHIP directors and state administrators are able to run Sub-State Region reports.

Sub-State Regions for Reporting Purposes

A sub-state region for reporting purposes under the “NPR Reports” tab is different from a sub-state region that was created within the “Agency” tab of the SHIP NPR website. A sub-state region for reporting purposes allows you to run summary reports that aggregate Client Contact or PAM forms for the sub-state region for reports that you created. Adding a sub-state region within the “Agency” tab creates a sub-state agency office listing for which users can register themselves and report forms.

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region for Reporting Purposes” link at the right of the screen. This directs you to a screen titled “List of Sub State Region for Report”.

Name	Type	
Test for NPR Manual	County Of Event	View Edit
test1	ZIP Code Of Client Residence	View Edit
test90	County Of Counselor Location	View Edit

1

This screen allows you to complete the following tasks:

- A. [View an Existing Sub-State Region for Reporting Purposes](#)
- B. [Add a Sub-State Region for Reporting Purposes](#)
- C. [Edit a Sub-State Region for Reporting Purposes](#)
- D. [Delete a Sub-State Region for Reporting Purposes](#)

A. View an Existing Sub-State Region for Reporting Purposes

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region for Reporting Purposes” link at the right of the screen. Any sub-state regions for reports that were created for your state will display on this page. If your state has many sub-state regions for reports, you may need to use the page numbers at the bottom of the page to scroll through the list. Click “View” next to the desired sub-state region for reports to view its details. If there are no sub-state regions for reports on this page, none were created for your state.

B. Add a Sub-State Region for Reporting Purposes

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region for Reporting Purposes” link at the right of the screen.

To create a new sub-state region for reports, click on the link titled “Add a Sub State Region for Report”. This link is located on the upper right hand side of the webpage. This directs you to a

screen titled “Add a new Sub State Region For Report”. Use the instructions below to complete the fields on this screen and create a new sub-state region for reporting purposes.

Add a new Sub State Region For Report

(Items marked in * indicate required fields.)

* State:

* Form Type:

* Group Type:

* Sub State Region Report Name:

Sub State Region Service Entity Code:

* Service Areas:

Counties/Zip Codes/Agencies	Service Areas
<input type="text"/>	<input type="text"/>

>> <<

State

This field is pre-populated to display your state.

Form Type (REQUIRED)

Indicate whether the sub-state region for reporting purposes that you create will be used to run reports on counts of either Client Contact forms or PAM forms. If you want to run sub-state region reports for both Client Contact and PAM forms, you must add a separate report for each form type.

Group Type (REQUIRED)

Use the dropdown list to specify how you will create groupings within the sub-state region for reporting purposes. The options that display in the dropdown list will depend on the form type you previously selected.

If you selected “Client Contact Form” as the form type, the following options will display:

- County Code of Client Residence
- ZIP Code of Counselor Location
- County of Counselor Location
- ZIP Code of Client Residence
- Agency

If you selected “Public Media Event Form” as the form type, the following options will display:

- County of Event
- PAM Agency

For example, if you want to run sub-state reports on Client Contact forms entered only by agencies designated as call centers, you would select the “Client Contact Form” as form type and then select the “Agency” option as group type. In later steps, you will be able to designate which agencies you wish to include in the sub-state region for reporting.

Sub-State Region Report Name (REQUIRED)

Enter a name for the region that you will recognize when running summary reports for this sub-state region.

Sub-State Region Service Entity Code

You may use this optional field to designate a code for the sub-state region to help identify the region when running summary reports.

For example, some states use short codes (e.g., Region 1) in addition to a longer name (e.g., Appalachian region). In this case, the state has the option of using “Region 1” or “1” as the sub-state region service entity code.

Service Areas

This field allows you to select which groups you want to include when running reports for this sub-state region for reporting purposes.

For example, if you selected “Agency” under the “Group Type” field, the box on the left will display all the agencies within your state. In the box on the left, locate the first agency you wish to include in the new sub-state region for reports, and click on it to select it. Next, you would click on the >> button to move the highlighted agency into the “Service Areas” box on the right. You would repeat this process for the remaining agencies you wish to include in the new sub-state region for reports. If you accidentally select and move an agency into the “Service Areas” box, you can undo it by highlighting the agency and clicking on the << button.

When all desired entities (e.g., agencies, counties, ZIP codes) are added to the “Service Areas” box, click “Submit” at the bottom of the screen. A success message will display stating, “Success! This Sub-state for Reporting has been successfully added.” The details of the newly created sub-state region for reports will display underneath the success message. The following links and buttons will also display on the screen:

- Edit: Use this *button* to make modifications to the newly-created sub-state region.
- Delete: Use this *button* to delete the newly-created sub-state region.
- Add a Sub State Region for Report: Use this *link* to create a new sub-state region for reports.
- Sub State Region for Report: Use this *link* to return to the “List of Sub State Region for Report” screen.

C. Edit a Sub-State Region for Reporting Purposes

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. Next, click on the “Create a Sub State Region For Reporting Purposes” link at the right of the screen. Any sub-state regions for reporting purposes that were created for your state will display on this page. If your state has many sub-state regions for reporting purposes, you may need to use the page numbers at the bottom of the page to scroll through the list to locate the desired listing. Click “Edit” next to the name of the sub-state region for reports that you wish to edit.

This directs you to a screen titled “Edit Sub State Region for Report”. Make the desired edits and click “Submit” at the bottom of the screen to save your changes. A success message will display stating, “Success! This Sub-state for Report has successfully been edited.” The details of the modified sub-state region for reports will display underneath the success message.

D. Delete a Sub-State Region for Reporting Purposes

Use the instructions in [View an Existing Sub-State Region for Reports](#) to locate the listing you wish to delete and view its details. On the screen that displays the details of the sub-state region for reporting purposes, click the “Delete” button at the right hand side of the screen. A pop-up box will display that asks whether you would like to delete the listing. Click “Yes” to delete the sub-state region for reporting purposes and be directed to the list of the remaining sub-state regions for reports within your state.

Client Contact Summary Reports

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. This directs you to the main NPR Reports homepage. The dropdown list on this page lists the different options for creating Client Contact summary reports. The options that display in the dropdown list will depend on your level of permissions within the website. For example, SHIP Directors and state administrators will be able to run many more types of reports than an agency user.

Agency User EditMyProfile RR CC PAM Upload SHIPProfile NPRReports Logout

PAM Reports
Sub State Region For Report

CC Report Type: <-----Select Report Type----->

- <-----Select Report Type----->
- Contacts - By State - By Date of Contact
- Contacts - By Agency - By Date of Contact
- Contacts - By County of Counselor Location - By Date of Contact
- Contacts - By ZIP Code of Counselor Location - By Date of Contact
- Contacts - By County of Client Residence - By Date of Contact
- Contacts - By ZIP Code of Client Residence - By Date of Contact
- Contacts - By Counselor - By Date of Contact
- Contact Records Entered - By Submitter - By Date Initially Submitted (Date Entered)
- Contacts - By Reporting Substate Region Based on Agency Groupings - By Date of Contact
- Contacts - By Reporting Substate Region Based on Counties of Counselor Locations - By Date of Contact
- Contacts - By Reporting Substate Region Based on ZIP Codes of Counselor Locations - By Date of Contact
- Contacts - By Reporting Substate Region Based on Counties of Client Residence - By Date of Contact
- Contacts - By Reporting Substate Region Based on ZIP Codes of Client Residence - By Date of Contact

Instructions to Run a Client Contact Summary Report

Use the following instructions when running any type of Client Contact summary report.

- **Report type:** Use the dropdown list to select a report type. The next section, [Types of Client Contact Summary Reports](#), describes the different report types and includes instructions on how and when to use each report type.
- **Date range:** After selecting a report type, select a date range for which you want to create the report. If the report type states “By Date of Contact”, the date range refers to the dates the client contacts occurred, not the date when the forms were entered into the SHIP NPR website. If the report type states “By Date Initially Submitted (Date Entered)”, the dates refer to the dates when the form was entered into the SHIP NPR website. Click on the calendar boxes to select start and end dates. You may also enter the dates directly into the boxes using the mm/dd/yyyy format.
- **Additional fields:** Certain report types may require that you fill out additional fields (e.g., agency, county, ZIP code). Instructions on how to complete these additional fields are described with the corresponding report types in the next section.
- **Submit:** Click “Submit” to generate the summary report. Click the “Printer Friendly Version” link in the upper right corner of the screen to view a version of the report that you can print.

Types of Client Contact Summary Reports

Contacts – By State – By Date of Contact

This report provides a state-level summary of all client contacts made during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

Contacts – By Agency – By Date of Contact

This report provides an agency-level summary of all client contacts made during a specific time period. Only individuals with an agency administrator or higher level of permissions will have the option to run this report.

Contacts – By County of Counselor Location – By Date of Contact

This report provides a summary of all client contacts made within a particular county in which the counseling service took place during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Contacts – By ZIP Code of Counselor Location – By Date of Contact

This report provides a summary of all client contacts made within a particular ZIP code in which the counseling took place during a specific time period. It does *not* generate reports based on the client’s ZIP code. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Contacts by County of Client Residence – By Date of Contact

This report provides a summary of all client contacts made within a particular county of client residence during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Contacts – By ZIP Code of Client Residence – By Date of Contact

This report provides a summary of all client contacts within a specific ZIP code of client residence during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Contacts – By Counselor – By Date of Contact

This report creates a summary of all client contacts made by a specific SHIP counselor during a specific time period. Counselors can run this type of report on forms for which they are listed as the counselor. Individuals who are designated as data submitters can run this type of report on counselors whose forms they submitted. Administrators (agency, sub-state, state) can run this report for counselors within regions they oversee.

Contact Records Entered – By Submitter – By Date Initially Submitted (Date Entered)

This report creates a summary of all client contacts entered by a counselor or data submitter during a specific time period. The date range for this type of report refers to the dates when the forms were entered into the SHIP NPR website. Counselors and data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report on forms submitted within regions they oversee.

Contacts – By Reporting Sub-State Region Based on Agency Groupings – By Date of Contact

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting purposes that was based on groupings of agencies. Only SHIP Directors and state administrators will have the option to run this report.

Contacts – By Reporting Sub-State Region Based on Counties of Counselor Locations – By Date of Contact

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of counties of counselor locations. Only SHIP Directors and state administrators will have the option to run this report.

Contacts – By Reporting Sub-State Region Based on ZIP Codes of Counselor Locations – By Date of Contact

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of ZIP codes of counselor locations. Only SHIP Directors and state administrators will have the option to run this report.

Contacts – By Reporting Sub-State Region Based on Counties of Client Residence – By Date of Contact

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of counties of client residence. Only SHIP Directors and state administrators will have the option to run this report.

Contacts – By Reporting Sub-State Region Based on ZIP Codes of Client Residence – By Date of Contact

This report creates a summary of all client contacts entered during a specific time period, for a specific sub-state region for reporting that was based on groupings of ZIP codes of client residence. Only SHIP Directors and state administrators will have the option to run this report.

Public and Media (PAM) Activity Summary Reports

Once you log in to the SHIP NPR website, click on the light blue “NPR Reports” button at the top of the screen. This directs you to the main NPR Reports homepage. Click the “PAM Reports” link at the right of the page. This directs you to a dropdown list that shows the different options for creating PAM summary reports. The options that display in the dropdown list will depend on your level of permissions within the website. For example, SHIP Directors and state administrators will be able to run many more types of reports than an agency user.

The screenshot shows the SHIP NPR website interface. At the top, there is a navigation bar with buttons for Agency, User, EditMyProfile, RR, CC, PAM, Upload, SHIPProfile, NPRReports, and Logout. Below this, the main content area displays the 'PAM Report Type:' label next to a dropdown menu. The dropdown menu is open, showing a list of report options:

- <-----Select Report Type----->
- <-----Select Report Type----->
- Activities-Events - By State - By Activity-Event Start Date
- Activities-Events -By Agency - By Activity-Event Start Date
- Activities-Events -By County of Event - By Activity-Event Start Date
- Activities-Events -By ZIP Code of Event - By Activity-Event Start Date
- Activities-Events -By Presenter-Contributor - By Activity-Event Start Date
- Activity-Event Records Entered - By Submitter - By Date Initially Submitted (Date Entered)
- Activities-Events -By Reporting Substate Region Based on Agency Groupings - By Activity-Event Start Date
- Activities-Events -By Reporting Substate Region Based on Counties of Event - By Activity-Event Start Date

Instructions to Run a PAM Summary Report

Use the following instructions when running any type of Client Contact summary report.

- **PAM report type:** Use the dropdown list to select a report type. The next section, [Types of PAM Summary Reports](#), describes the different report types and includes instructions on how and when to use each report type.
- **Date range:** After selecting a report type, select a date range for which you want to create the report. If the report type states “By Activity-Event Start Date”, the date range refers to the date the PAM activity occurred, not the date when the forms were entered into the SHIP NPR website. If the report type states “By Date Initially Submitted (Date Entered)”, the dates refer to the dates when the PAM form was entered into the SHIP NPR website. Click on the calendar boxes to select start and end dates. You may also enter the dates directly into the boxes using the mm/dd/yyyy format.
- **Additional fields:** Certain report types may require that you fill out additional fields (e.g., agency, county, ZIP code). Instructions on how to complete these additional fields are described with the corresponding report types in the next section.
- **Submit:** Click “Submit” to generate the summary report. Click the “Printer Friendly Version” link in the upper right corner of the screen to view a version of the report that you can print.

Types of PAM Summary Reports

Activities-Events – By State – By Activity-Event Start Date

This report provides a state-level summary of all PAM activities that took place during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

Activities-Events – By Agency – By Activity-Event Start Date

This report provides an agency-level summary of all PAM activities that took place during a specific time period. Only individuals with an agency administrator or higher level of permissions will have the option to run this report.

Activities-Events – By County of Event – By Activity-Event Start Date

This report provides a summary of all PAM activities that took place within a particular county and during a specific time period. Individuals can run this type of report on PAM forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Activities-Events – By ZIP Code of Event – By Activity-Event Start Date

This report provides a summary of all PAM activities that took place within a particular ZIP code and during a specific time period. Individuals can run this type of report on PAM forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Activities-Events – By Presenter-Contributor – By Activity-Event Start Date

This report creates a summary of all PAM activities in which a particular individual is listed as a presenter or contributor, and that took place during a specific time period. Individuals can run

this type of report on PAM forms they submitted. Administrators (agency, sub-state, state) can run this report for regions they oversee.

Activity-Event Records Entered – By Submitter – By Date Initially Submitted (Date Entered)

This report creates a summary of all PAM forms entered by an individual during a specific time period. The date range for this type of report refers to the dates when the forms were entered into the SHIP NPR website. Counselors and data submitters can run this type of report on forms they submitted. Administrators (agency, sub-state, state) can run this report on forms submitted within regions they oversee.

Activities-Events – By Reporting Sub-State Region Based on Agency Groupings – By Activity-Event Start Date

This report creates a summary of all PAM activities that occurred within a specific sub-state region for reporting that was based on groupings of agencies, and that took place during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

Activities-Events – By Reporting Sub-State Region Based on Counties of Event – By Activity-Event Start Date

This report creates a summary of all PAM activities that occurred within a specific sub-state region for reporting that was based on groupings of counties, and that took place during a specific time period. Only SHIP Directors and state administrators will have the option to run this report.

CHAPTER 6

PASSWORD RESET INSTRUCTIONS AND TIPS

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How to Reset Your SHIP NPR Password

The SHIP NPR website recently revised its password requirements to comply with new security regulations from the Centers for Medicare & Medicaid Services (CMS). The steps described below will guide you through steps to reset your password and create a new password that meets the new security requirements. You also may use these instructions at any time if you forget your password.

Instructions: Reset Your SHIP NPR Password

1. Go to the SHIP NPR website (<https://shipnpr.shiptalk.org>).
2. Click on the "Reset Password" button located on the left side of the page and circled in the image below.



You may also begin the password reset process by clicking the "Forgot password?" link next to the "GO" button on the left side of the page. Both the "Reset Password" button and the "Forgot password?" link will take you to the same place.

3. On the Forgot Password page, enter and re-enter your e-mail address in the boxes as prompted. Enter the text that appears in the black box into the text box underneath it. If you cannot read the letters and numbers in the black box, click on the arrows button  on the right-hand side of the box to view a new image. You may also click on the image of a speaker  to hear an audio recording of the letters and numbers displayed.

Forgot password?

If you have a SHIPtalk account and forgot your password, you can reset your password by providing the requested information below:

Please enter the email address you used when you registered for SHIPtalk

Please re-enter your email address



Enter text from the image or sound above

4. Click the “Submit” button. If the text you entered does not match the text in the black box, you will be prompted with a new image. Enter the letters and numbers displayed, and click "Submit" again.
5. You should see the following message: [Thank You! Your request has been submitted. If the email address you entered is in our system you will receive an email shortly. If you do not receive an email after a while, please verify that you entered the registered email associated with your SHIP NPR account. Please check your Junk mail folder as well. If you have additional questions, please contact the SHIP NPR Help Desk at 1-800-253-7154, option 1.](#)
6. You will receive an e-mail from the SHIP NPR Help Desk (SHIPNPRhelp@TechnicalFrontiers.com). If the message is not in your inbox, you may need to check your spam or junk e-mail folders. The e-mail will say the following:

Hello,

A request to reset your password was made at shipnpr.shiptalk.org.

If you did not request your password reset, please disregard this message.

[Follow this link](#) to reset your password. If you have difficulties accessing the link, copy and paste the link below into your browser’s address bar to verify your email address.

<https://shipnpr.shiptalk.org/NewPass.aspx?prt=default@air.org5fa182d>

Thank you,

SHIP NPR Help Desk

7. Clicking on the link in the e-mail directs you back to the SHIP NPR website, where you can reset your password (as shown in the screenshot below).

Thank you!
You may create your new password in the box below.

Minimum security requirements:

- Your password must be between 8 and 30 characters.
- Your password must contain at least one uppercase (capital) letter (e.g., A, B, etc.).
- Your password must contain at least one digit (e.g., 1, 2, 3, etc.).
- Your password must contain at least one special character (e.g. !, @, #, %, etc.).
- Your password may not include any actual words (referred to as "dictionary words"). This includes certain common names as well.

Please enter your new password below:

New Password:

Re-type Password:

8. You will now have to create your new password. As described in the yellow box labeled “Minimum Security Requirements,” your password must follow all of these rules:
 - a. Your password must be between 8 and 30 characters.
 - b. Your password must contain at least one uppercase (capital) letter (e.g., A, B, etc.).
 - c. Your password must contain at least one digit (e.g., 1, 2, 3, etc.).
 - d. Your password must contain at least one special character. Special characters can be a punctuation mark or any other symbol on your keyboard (e.g., @ ! \$ % * ? +).
 - e. Your password cannot include any actual words (referred to as “dictionary words”). For example, you may not use the word “book” in your password, but you may use “b00k” instead (using zeroes instead of the letter “o”). Certain common names may also be considered words, so please keep this in mind when creating your password.
9. Enter your new password into the corresponding boxes in the middle of the page and click “Submit”. If the password you selected does not meet the security criteria, a message in red will notify you that your password does not meet the minimum requirements. Create a different password that meets the security requirements. Enter the new password into the boxes and click “Submit.”

Minimum security requirements:
 Your password must be between 8 to 30 characters and must contain at least one upper case letter, at least one digit and at least one special character.

Please enter your new password below:

New Password:

Password entered does not meet minimum requirements. Please see the yellow box above for a description of what your password needs to include.

Re-type Password:

Password and Re-type password must match



An example of an acceptable password is the following: Alfb00k*1”

This password contains an uppercase, or capital, letter; several digits, or numbers; and two special characters (the * and “ ”). It also does not contain any words found in a dictionary.

10. You should see a message that your password has been successfully reset. You will receive an email notification from the Help Desk confirming that you made changes to your account.
11. You may click on the link titled “Click here to login” or type <https://shipnpr.shiptalk.org> into your Internet browser’s address bar to return to the SHIP NPR homepage and log in to the website.
12. You should now be able to log in to the SHIP NPR website using your email address and new password.
13. Congratulations—you reset your password successfully!

You will be prompted to change your password again every 60 days.

For additional tips on how to create a password, please see the following page.

Password Tip Sheet

The SHIP NPR Help Desk team understands that it can be challenging to create a password that meets all the new security requirements. We developed the following list of tips to help users create a password that will be **easy to remember while fulfilling all the security requirements**. Each tip also includes an example and corresponding explanation that illustrates how to use the tip.

Tip #1: Substitute letters with numbers or special characters

Have you noticed how the special character \$ looks like the letter S? Or how the number 3 looks like a backwards letter E? This method replaces letters in a word or phrase with numbers and special characters that resemble those letters.

Example:
Sh!pt@1k

Explanation: The password in this example resembles the word Shiptalk; however, the letters i, a, and l were substituted with the special characters and number !, @, and 1, respectively. This password meets all the security requirements because it is at least 8 characters long; contains at least one uppercase letter, one digit, and one special character; and does not spell out a dictionary word.

Tip #2: Use significant dates

Do you have a date that is important to you (e.g., birthday or anniversary)? This method uses numbers for the bulk of the password.

Example:
02012013St!

Explanation: This password begins by using a date (02/01/2013) and is followed by initials and a special character. This password meets all the security requirements because it is at least 8 characters long; contains at least one uppercase letter, one digit, and one special character; and does not spell out a dictionary word.

Tip #3: Use acronyms

Have you heard the phrase, “Let bygones be bygones”? This method uses phrases (or names of family members, places, etc.) to create an acronym.

Example:
Lbbb!725

Explanation: This password begins by using an acronym for the phrase, “Let bygones be bygones.” We used the first letter of each word to create the acronym: “Lbbb”. Using an uppercase letter for the first letter fulfills one requirement. To fulfill the remaining password requirements, we placed a special character and numbers after the phrase.

Here’s an example of how to create your own password:

Let’s say you have six grandchildren: *John, Jane, Sam, Suzy, Tom, and Tracey*. You want to create a password that will be easy for you to remember, so you decide to list the names of your grandchildren alphabetically (you can also list them by age, or girls first, boys second, etc.). At least one of the initials must be uppercase. Complete the password with a < and 3, which look like a sideways heart when combined!

Your password:
JjSsTt<3

Explanation: Your password lists their names as an acronym. It has at least one uppercase letter, one special character, one number, and does not spell a dictionary word.

The next time you are required to change your password, try one of these methods and personalize it by using your own phrases, family members, initials, significant dates, etc. If you need additional assistance, contact the Help Desk at 1-800-253-7154, ext. 1 or SHIPNPRhelp@TechnicalFrontiers.com.