2017 SMP/SHIP National Conference
JULY 10–13, 2017   AUSTIN, TX

An “A to Z” Interactive Discussion of SHIP NPR Functionality, Enhancements and Tips based on SHIP Feedback and Help Desk Inquiries

Technical Frontiers, Inc.
Agenda

• Top Inquires to the Help Desk
• Updates to CMS Unique ID and Accounts
• Sub-State Regions
• State Special Use Fields
• Batch Uploads
• Other SHIP NPR Items and Questions
Top Inquires to the Help Desk

• Password Resets & Creation
• Account Set-Up & Access
• Email Changes
• Ad Hoc Data Requests
• CMS SHIP Unique IDs
• Batch Uploads
• Client Contacts and/or PAMs
User Page

2017 SMP/SHIP National Conference
Active User List

Search Users
Use the search feature to find Users by their first name, last name or both. The results are filtered based on your role and search criteria.

Active User List
Add a New User
Inactive User List
Review Approve, Deny Users
Review Approve, Deny, Revoke CMS SHIP Unique ID Requests
Download Approved CMS SHIP Unique IDs
NPR User Manual: Overview of SHIP NPR

View / Download User List
View user information that include UserID of the User. View or download the list of users at state, agency and sub-state regional levels.

<table>
<thead>
<tr>
<th>Role</th>
<th>First Name</th>
<th>Last Name</th>
<th>Primary Email</th>
<th>CMS SHIP Unique ID</th>
<th>NPR User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency User</td>
<td>Agency</td>
<td>User</td>
<td><a href="mailto:tytyty078@gmail.com">tytyty078@gmail.com</a></td>
<td>60698773</td>
<td>1195</td>
</tr>
<tr>
<td>OLD NPR DATA - NOT A REAL AGENCY (AS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agency User</td>
<td>Agency</td>
<td>Nprreadonly</td>
<td><a href="mailto:tytyty0071@gmail.com">tytyty0071@gmail.com</a></td>
<td>1196</td>
<td></td>
</tr>
</tbody>
</table>
### Inactive User List

**Search Users**

Use the search feature to find Users by their first name, last name or both. The results are filtered based on your role and search criteria.

**Search Inactive Users**

Enter the search feature to find Users by their first name, last name or both. The results are filtered based on your role and search criteria.

NPR User Manual: 120 Day Inactivation

#### Active User List
- Add a New User
- Review Approve, Deny Users
- Revoke CMS SHIP Unique ID Requests
- Download Approved CMS SHIP Unique IDs

#### User Manual: Overview of SHIP NPR

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<table>
<thead>
<tr>
<th>User Role</th>
<th>First Name</th>
<th>Last Name</th>
<th>Primary Email</th>
<th>Reason</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jose</td>
<td>Testereight</td>
<td></td>
<td><a href="mailto:tester8@88.aa">tester8@88.aa</a></td>
<td>Inactivated by Admin</td>
<td>Activate</td>
</tr>
<tr>
<td>State</td>
<td>Administrator</td>
<td></td>
<td><a href="mailto:state.adm.npr@gmail.com">state.adm.npr@gmail.com</a></td>
<td>No activity for 120 days</td>
<td>Activate</td>
</tr>
<tr>
<td>Johnny</td>
<td>Hero</td>
<td></td>
<td><a href="mailto:bmcmahon@air.org">bmcmahon@air.org</a></td>
<td>Inactivated by Admin</td>
<td>Activate</td>
</tr>
</tbody>
</table>
SHIP NPR User Accounts

• Users must do one of the following at least once every 120 days:
  — Log in to their SHIP NPR account, or
  — Have new client contacts and/or public media and events entered into SHIP NPR under their name.

• If not, then their account will be automatically inactivated at 120 days by SHIP NPR
CMS SHIP Unique IDs

Search Users
Use the search feature to find Users by their first name, last name or both. The results are filtered based on your role and search criteria.

- Active User List
- Add a New User
- Inactive User List
- Review, Approve, Deny Users
- Review, Approve, Deny, Revoke CMS SHIP Unique ID Requests
- Download Approved CMS SHIP Unique IDs
- NPR User Manual: Overview of SHIP NPR

Search Users: Enter Full name or part of the name, email, phone to search

Search
CMS SHIP Unique IDs

• As of March 1, 2017 - Automatic Revocation of CMS SHIP Unique ID with Inactivation of SHIP NPR Account
  – When a SHIP NPR user’s account becomes inactive for 120 days of non-use by the user, SHIP NPR will automatically inactivate that user’s account AND revoke the user’s CMS SHIP Unique ID.

• Manual Inactivation of SHIP NPR Account
  – A SHIP NPR user’s account can be manually inactivated by the SHIP Director, Director Designee(s), or Administrator at any time.
  – This action will result in the automatic revocation of the CMS SHIP Unique ID.
CMS SHIP Unique IDs

• **Reactivating of SHIP NPR Account:**
  – The SHIP Director, Director Designee(s), or Administrator can manually activate a SHIP NPR account at any time. SHIP NPR will not allow the reactivation of the CMS SHIP Unique ID.

• **Revoking of CMS SHIP Unique ID:**
  – The SHIP Director or Director Designee(s) would revoke the user’s CMS SHIP Unique ID while leaving the SHIP NPR account active.

• **Reactivating the CMS SHIP Unique ID (after revocation):**
  – The SHIP Director, Director Designee(s), or Administrator must manually reactivate a CMS SHIP Unique ID after it has been revoked.
CMS SHIP Unique ID – Effective Dates

• ACL sends CMS an updated CMS SHIP Unique ID list on the last Thursday of every month.

• CMS takes 7 -10 days to process the monthly Unique ID file.

• Unique IDs that are approved before the last Thursday of the month will be available for use within the first 7 - 10 days of the following month.

• Unique IDs approved on the last Thursday of the month or after, will be usable the second month following their approval.
## Summary Action Chart

<table>
<thead>
<tr>
<th>Action</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve CMS SHIP Unique ID</td>
<td>SHIP Director (or Director Designee) Only</td>
</tr>
<tr>
<td>Deny CMS SHIP Unique ID</td>
<td>SHIP Director (or Director Designee) Only</td>
</tr>
<tr>
<td>Revoke CMS SHIP Unique ID</td>
<td>SHIP Director (or Director Designee) Only</td>
</tr>
<tr>
<td>Manually Inactivate a SHIP NPR User Account</td>
<td>SHIP Director (or Director Designee) or Administrator</td>
</tr>
<tr>
<td>Reactivate a SHIP NPR User Account</td>
<td>SHIP Director (or Director Designee) or Administrator</td>
</tr>
<tr>
<td>Reactivate a CMS SHIP Unique ID after Inactivity</td>
<td>SHIP Director (or Director Designee) Only</td>
</tr>
<tr>
<td>Reinstate a CMS SHIP Unique ID after Revocation</td>
<td>SHIP Director (or Director Designee) or Administrator</td>
</tr>
</tbody>
</table>
CMS SHIP Unique IDs
Reminders for Open Enrollment Period

• **Before** Wednesday, September 27th
  – Review the Inactive User list
  – Reactivate Users
  – Reinstate Unique IDs by 5:00pm EST (Unique ID will then be active in October)
  – Remind users to log into SHIP NPR at least once every 120 days or enter CCs/PAMS to remain active

• **After** Thursday September 28th
  If a user’s Unique IDs is processed after this date then:
  – The Unique IDs will not be active for the start of Open Enrollment
  – The user will **NOT** be able to call the CMS 1-800 number designated for SHIPs in October
  The user should be added to the October CMS Unique ID list
  – User’s Unique ID may not be active then till the first week in November
Agency

Find an Agency

Search Keywords: 
Filter by State: American Samoa

Add an Agency
Add a Sub-State Region
List all Agencies

Search
Managing Sub-State Regions
Sub-State Regions and NPRReports
Creating Sub-State Region for NPR Reports

List of Sub State Region For Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>View</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Large Central Metro</td>
<td>County Of Counselor Location</td>
<td>View</td>
<td>Edit</td>
</tr>
<tr>
<td>1st TN AAAD</td>
<td>County Of Counselor Location</td>
<td>View</td>
<td>Edit</td>
</tr>
<tr>
<td>2. Large Fringe Metro</td>
<td>County Of Counselor Location</td>
<td>View</td>
<td>Edit</td>
</tr>
<tr>
<td>2014-17 MIPPA Grantees - CC Data</td>
<td>Agency</td>
<td>View</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Add a new Sub State Region For Report

- **State:** American Samoa
- **Form Type:** Client Contact Form
- **Group Type:** Agency
- **Sub State Region Report Name:** Test Cluster 1
- **Sub State Region Service Entity Code:**
- **Service Areas:**
  - Counties/Zip Codes/Agencies
  - Service Areas
    - (GHC) - Johnston Co
    - American Samoa AG
    - Atlanta Regional Comm
Creating Sub-State Regions for NPRReports

Test Cluster 1

SubStateRegion Name: Test Cluster 1
Report State: American Samoa
Report Form Type: Client Contact Form
SubStateRegion Type: Agency
SubStateRegion Entity Code: (FQHC) - Johnston City (Williamson County)
American Samoa Agency
Atlanta Regional Commission

CC Report Type: Contacts - By Reporting Substate Region Based on Agency Groupings - By Date of Contact
Limit to Date Range From: 04/01/2017
To: 04/30/2017
State: American Samoa
SubstateAgencyRegionID: Test Cluster 1
Submit
State Special Use Fields
Add a Special Use Field

Special Fields Manager

- Name: Test
- State: American Samoa
- Start Date: 05/30/2017
- End Date: 05/30/2027
- Description: AS CC SUF Y=1 N=0
- Validation Type: AlphaNumeric
- Is Required: No
- Field Type: STATE
- Form Type: Client Contact

Add Client Contact

ACL Special Use Fields

- MIPPA CLIENT 1 2 3:

State and Local Special Use Fields

- Test:
Managing Special Use Fields

- Addition of either CC and PAM Special Use Fields
Enrollment Outcomes Pilot Preview
State Special Use Fields

**Add Client Contact**

*PRESCRIPTION DRUG ASSISTANCE*
Important: Enter Cost Data In State and Local Special Use Fields when Applicable

- Medicare Prescription Drug Coverage (Part D):
  - ☐ 1-Eligibility/Screening
  - ☐ 2-Benefit Explanation
  - ☐ 3-Plans Comparison
  - ☑ 4-Plan Enrollment/Disenrollment

- Medicare Advantage (HMO, POS, PPO, PFFS, SNP, MSA, Cost):
  - ☐ 27-Eligibility/Screening
  - ☐ 28-Benefit Explanation
  - ☐ 29-Plans Comparison
  - ☑ 30-Plan Enrollment/Disenrollment

**ACL Special Use Fields**
- MIPPA CLIENT 1 2 3:
- Dual Ref In Srce 1-7:
- Enrol Broker Asst YN:
- Letter Stat Mcaid YN:
- Managed Care Optn YN:
- Enrollment Assist YN:
- Other Mcare Issue YN:
- Pubs Other Mater YN:
- Dual Refer Out 1-8:
- Bene Disposition 1-5:

**State and Local Special Use Fields**
- PDP/MA-PD $ Before:
- PDP/MA-PD $ After:
- Drug List ID:
- Password Date:
- PDP/MA-PD $ Notes:

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Batch Upload
Example Error Message

Validation Rule: Race-Ethnicity section

<table>
<thead>
<tr>
<th>Field name</th>
<th>Validation Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Race-Ethnicity section</td>
<td>At least one of the fields of Race-Ethnicity Section MUST contain a Boolean True (&quot;Y&quot;, &quot;yes&quot;, &quot;True&quot;, etc.).</td>
</tr>
<tr>
<td>Not Collected field</td>
<td>When any field other than the 'Not Collected' field contain a Boolean True, the value of 'Not Collected' will be automatically set to 'N'.</td>
</tr>
</tbody>
</table>
### Corrections to Batch Upload Files

#### SAMPLE CLIENT CONTACT BATCH INPUT FILE – FAKE DATA

<table>
<thead>
<tr>
<th>File</th>
<th>Edit</th>
<th>Format</th>
<th>View</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>37</td>
<td>3000001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000002</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000003</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000006</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
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<td></td>
</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000011</td>
<td></td>
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</tr>
<tr>
<td>A</td>
<td>37</td>
<td>3000012</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| A    | 37   | 3000013 |      |      |
| A    | 37   | 3000014 |      |      |
| A    | 37   | 3000015 |      |      |
| A    | 37   | 3000016 |      |      |
| A    | 37   | 3000017 |      |      |
| A    | 37   | 3000018 |      |      |
| A    | 37   | 3000019 |      |      |
| A    | 37   | 3000020 |      |      |
| A    | 37   | 3000021 |      |      |
| A    | 37   | 3000022 |      |      |
| A    | 37   | 3000023 |      |      |
| A    | 37   | 3000024 |      |      |
| A    | 37   | 3000025 |      |      |
| A    | 37   | 3000026 |      |      |
| A    | 37   | 3000027 |      |      |
| A    | 37   | 3000028 |      |      |
| A    | 37   | 3000029 |      |      |
| A    | 37   | 3000030 |      |      |
| A    | 37   | 3000031 |      |      |
| A    | 37   | 3000032 |      |      |

The action MUST be one of the following values:
- A - Stands for ‘Add’. Value ‘A’ indicates that the record is a new record never before submitted.
- U - Stands for ‘Update’. Value ‘U’ indicates that an update is being requested for a previous record that matches the Agency Code + Unique Record ID being uploaded.
- D - Stands for ‘Delete’. Value ‘D’ indicates that a delete operation is being requested for a record with the Agency Code + Unique Record ID being uploaded.
Contact Information

Technical Frontiers, Inc. - SHIP NPR Helpdesk
Shipnprhelp@technicalfrontiers.com
1-800-253-7154, ext. 1.