



# **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

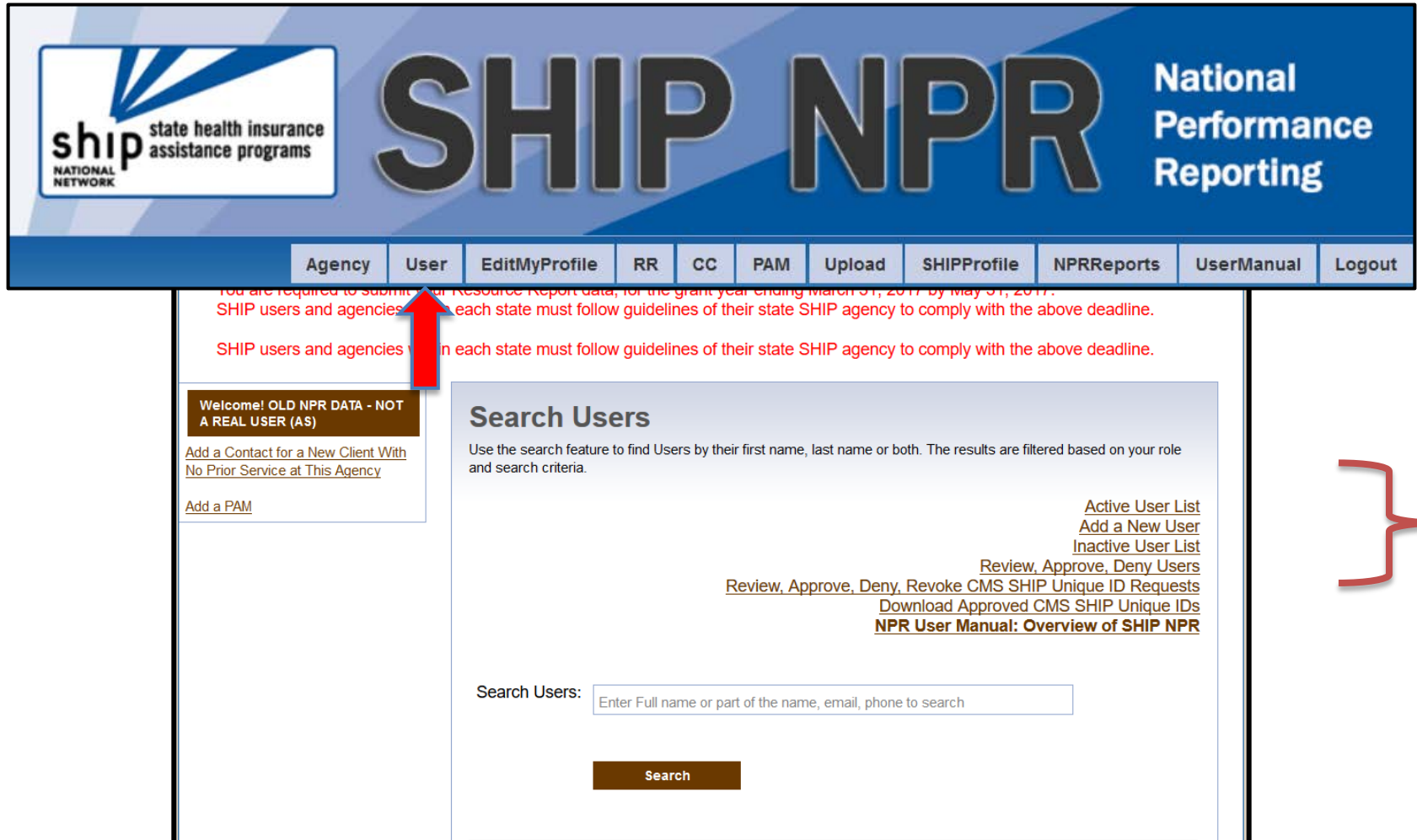


# Top Inquires to the Help Desk

- 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



The screenshot displays the SHIP NPR National Performance Reporting User Page. The header features the SHIP National Network logo and the title 'SHIP NPR National Performance Reporting'. A navigation bar includes links for Agency, User, EditMyProfile, RR, CC, PAM, Upload, SHIPProfile, NPRReports, UserManual, and Logout. The 'User' link is highlighted with a red arrow. Below the navigation bar, a red text message states: 'You are required to submit your Resource Report data, for the grant year ending March 31, 2017 by May 31, 2017. SHIP users and agencies in each state must follow guidelines of their state SHIP agency to comply with the above deadline.' A sidebar on the left contains a welcome message and links to add new clients, PAMs, and contacts. The main content area is titled 'Search Users' and provides instructions on how to use the search feature. It includes a list of links for user management and a search form with a 'Search' button. A red bracket on the right side of the page groups the sidebar and main content areas.

**SHIP** National Performance Reporting

Agency User EditMyProfile RR CC PAM Upload SHIPProfile NPRReports UserManual Logout

You are required to submit your Resource Report data, for the grant year ending March 31, 2017 by May 31, 2017. SHIP users and agencies in each state must follow guidelines of their state SHIP agency to comply with the above deadline.

SHIP users and agencies in each state must follow guidelines of their state SHIP agency to comply with the above deadline.

Welcome! OLD NPR DATA - NOT A REAL USER (AS)

[Add a Contact for a New Client With No Prior Service at This Agency](#)

[Add a PAM](#)

### 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:

Search

# 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](#)

Search Users:

## 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.

[Download User List](#)

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

# 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.

[Active User List](#)  
[Add a New User](#)  
[Inactive User List](#)  
[Review, Approve, Deny Users](#)  
[Download Approved CMS SHIP Unique ID Requests](#)  
[User Manual: Overview of SHIP NPR](#)

one to search

## Search Inactive 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.

[NPR User Manual: 120 Day Inactivation](#)  
[Inactive User List](#)

Search Inactive Users:

↓

User Role	First Name	Last Name	Primary Email	Reason	Action
	Jose	Testereight	tester8@88.aa ■ Inactive	Inactivated by Admin	<a href="#">Activate</a>
	State	Administrator	state.adm.npr@gmail.com ■ Inactive	No activity for 120 days	<a href="#">Activate</a>
	Johnny	Hero	bmcMahon@air.org ■ Inactive	Inactivated by Admin	<a href="#">Activate</a>

# 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

Action	Responsible Party
Approve CMS SHIP Unique ID	SHIP Director (or Director Designee) Only
Deny CMS SHIP Unique ID	SHIP Director (or Director Designee) Only
Revoke CMS SHIP Unique ID	SHIP Director (or Director Designee) Only
Manually Inactivate a SHIP NPR User Account	SHIP Director (or Director Designee) or Administrator
Reactivate a SHIP NPR User Account	SHIP Director (or Director Designee) or Administrator
Reactivate a CMS SHIP Unique ID after Inactivity	SHIP Director (or Director Designee) Only
Reinstate a CMS SHIP Unique ID after Revocation	SHIP Director (or Director Designee) or Administrator



# CMS SHIP Unique IDs

## Reminders for Open Enrollment Period

- **Before** Wednesday, September 27<sup>th</sup>
  - 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 28<sup>th</sup>

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**

[Add an Agency](#)  
[Add a Sub-State Region](#)  
[List all Agencies](#)

Search Keywords:

Filter by State:

# Managing Sub-State Regions

## Find an Agency

[Add an Agency](#)  
[Add a Sub-State Region](#)  
[List all Agencies](#)

Search Keywords:

Filter by State: American Samoa

Search

## Edit Test Cluster 1

(Items marked in \* indicate required fields.)

\* Sub-State Region Name:

Is Active: ☒

\* Sub-State Region Agencies:

Agencies

etst1234  
Heart of Georgia  
Legacy Link  
Northeast  
OLD NPR DATA - NC  
PAM TEST MD  
sjdsjsjsff  
Southern  
SOWEGA  
Test Agency 1

>>  
<<

Sub-State Region Agencies

(FQHC) - Johnston City  
American Samoa Agen  
Atlanta Regional Comm

Submit

## Success!

This Sub-State Region has been successfully added.

[Add a Sub-State Region](#)  
[Find Agencies](#)

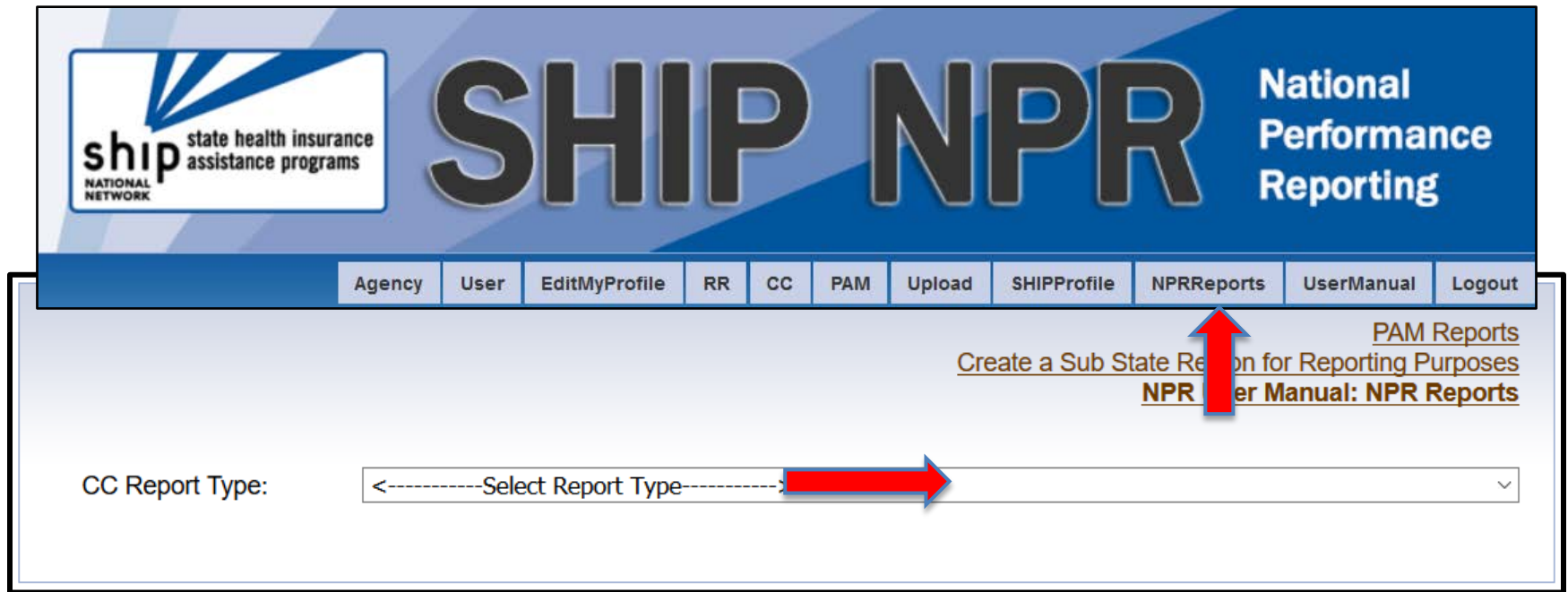
### Test Cluster 1

State:	American Samoa
Sub-State Region Name:	Test Cluster 1
Is Active:	Yes
Sub-State Region Agencies:	(FQHC) - Johnston City (Williamson County) American Samoa Agency Atlanta Regional Commission

EditDelete

**2017** SMP/SHIP National Conference

# Sub-State Regions and NPRReports



The image shows a screenshot of the SHIP NPR National Performance Reporting web application. The header features the SHIP logo (state health insurance programs NATIONAL NETWORK) and the title "SHIP NPR National Performance Reporting". Below the header is a navigation bar with buttons for Agency, User, EditMyProfile, RR, CC, PAM, Upload, SHIPProfile, NPRReports, UserManual, and Logout. The "NPRReports" button is highlighted with a red arrow. Below the navigation bar, there are links for "PAM Reports", "Create a Sub State Region for Reporting Purposes", and "NPR User Manual: NPR Reports". The "NPR User Manual: NPR Reports" link is also highlighted with a red arrow. Below these links, there is a form labeled "CC Report Type:" with a dropdown menu. The dropdown menu is currently showing "<-----Select Report Type----->" and is highlighted with a red arrow.

SHIP National Performance Reporting

Agency User EditMyProfile RR CC PAM Upload SHIPProfile **NPRReports** UserManual Logout

[PAM Reports](#)  
[Create a Sub State Region for Reporting Purposes](#)  
[NPR User Manual: NPR Reports](#)

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



# Creating Sub-State Region for NPRReports

[PAM Reports](#)  
[Create a Sub State Region for Reporting Purposes](#)  
[NPR User Manual: NPR Reports](#)

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

**List of Sub State Region For Report**  
[Add a Sub State Region for Report](#)

Name	Type	
<a href="#">1. Large Central Metro</a>	County Of Counselor Location	<a href="#">View</a>   <a href="#">Edit</a>
<a href="#">1st TN AAAD</a>	County Of Counselor Location	<a href="#">View</a>   <a href="#">Edit</a>
<a href="#">2. Large Fringe Metro</a>	County Of Counselor Location	<a href="#">View</a>   <a href="#">Edit</a>
<a href="#">2014-17 MIPPA Grantees - CC Data</a>	Agency	<a href="#">View</a>   <a href="#">Edit</a>

**Add a new Sub State Region For Report**  
(Items marked in \* indicate required fields.)

\* 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
etst1234	>>	(FQHC) - Johnston Ci
Heart of Georgia		American Samoa Age
Legacy Link	<<	Atlanta Regional Com
Northeast		
OLD NPR DATA - NC		
PAM TEST MD		
sjdsjdsjsff		
Southern		
SOWEGA		
Test Agency 1		

Submit

# Creating Sub-State Regions for NPRReports

## Success!

This Substate for Report has been successfully added.

[Add a Sub State Region For Report](#)  
[Sub State Region For Report](#)

### Test Cluster 1

[Edit](#)[Delete](#)

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

[Agency](#)[User](#)[Ed](#)

# NPR

## National Performance Reporting

[PAM Reports](#)[Create a Sub State Region for Reporting Purposes](#)[NPR User Manual: NPR Reports](#)

CC Report Type:

Limit to Date Range From  To (MM/DD/YYYY):

State:

SubstateAgencyRegionID:

# State Special Use Fields



## 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](#)

[NPR User Manual: Client Contact Form](#)

[Download Client Contact to Excel](#)

# Add a Special Use Field

**Special Fields Manager**

<b>Name:</b>	<input type="text" value="Test"/>	<b>State:</b>	American Samoa
<b>Start Date:</b>	<input type="text" value="05/30/2017"/> 	<b>End Date:</b>	<input type="text" value="05/30/2027"/> 
<b>Description:</b>	<input type="text" value="AS CC SUF Y=1 N=0"/>		
<b>Validation Type:</b>	<input type="text" value="AlphaNumeric"/> 	<b>Is Required</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Validaton Range:</b>	<input type="text"/>		
<b>Field Type:</b>	<input type="text" value="STATE"/> 	<b>Form Type:</b>	Client Contact
			<input type="button" value="Save"/>

## Add Client Contact

### ACL Special Use Fields

MIPPA CLIENT 1 2 3:

### State and Local Special Use Fields

Test:

# Managing Special Use Fields

## Special Fields Manager

State

Search Filter Start Date:

Search Filter End Date:

Field Name	Start Date	End Date	Special Field Type	Edit	Delete
Test	Tuesday, May 30, 2017	Sunday, May 30, 2027	STATE	<a href="#">Edit</a>	<a href="#">Delete</a>

- 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:

# Batch Upload



## Upload CC or Pam File

Upload CC or Pam data file for processing. Files will be uploaded, validated and processed.



[Client Contact Batch File Upload Specifications](#)  
[Public and Media Batch File Upload Specifications](#)  
[NPR User Manual:Batch Upload Systems](#)  
[View recent activities](#)

Browse... No file selected.

Process

# Example Error Message

**Upload CC or Pam File**  
Upload CC or Pam data file for processing. Files will be uploaded, validated and processed.

[View recent activities](#)

100 out of a total of 100 records did not pass the validation checks.  
No records have been uploaded at this time, until you get to the "Process" button step (after all errors fixed)

**Validation Output**

Record: 30000001 Invalid value non numeric character found for special field Field2  
Record: 30000002 Not Collected NotCollected - Ethnicity of client was not specified  
Record: 30000002 Invalid value non numeric character found for special field Field2  
Record: 30000003 Invalid value non numeric character found for special field Field2  
Record: 30000004 Invalid value non numeric character found for special field Field2  
Record: 30000005 Invalid value non numeric character found for special field Field2  
Record: 30000006 Invalid value non numeric character found for special field Field2  
Record: 30000007 Not Collected NotCollected - Ethnicity of client was not specified  
Record: 30000007 Invalid value non numeric character found for special field Field2  
Record: 30000008 Invalid value non numeric character found for special field Field2  
Record: 30000009 Invalid value non numeric character found for special field Field2  
Record: 30000040 Invalid value non numeric character found for special field Field2  
Record: 30000041 Invalid value non numeric character found for special field Field2  
Record: 30000042 Invalid value non numeric character found for special field Field2  
Record: 30000043 Invalid value non numeric character found for special field Field2

**Upload CC or Pam File**  
Upload CC or Pam data file for processing. Files will be uploaded, validated and processed.

[View recent activities](#)

6 out of a total of 100 records did not pass the validation checks.  
94 out of 100 records did pass validation checks.  
No records have been uploaded at this time, until you get to the "Process" button step (after all errors fixed)

**Validation Output**

Record: 40000045 Not Collected NotCollected - Ethnicity of client was not specified

**Validation Rule: Race-Ethnicity section**

Field names	Validation Logic
Client Race-Ethnicity section	At least one of the fields of Race-Ethnicity Section MUST contain a Boolean True ('Y', 'yes', 'True' etc).
<u>Not Collected</u> field	When any field other than the 'Not Collected' field contain a Boolean True, the value of 'Not Collected' will be automatically set to 'N'.



# Corrections to Batch Upload Files

[illegible]

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](mailto:Shipnprhelp@technicalfrontiers.com)

1-800-253-7154, ext. 1.

