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

SIRS* Advanced Session

*SIRS = SMP Information and Reporting System

Today's Panelists

ACL	Booz Allen Hamilton	SMP Resource Center
• Stacey Platte	• Mike Millett • Rod Oyola • Tommy Carpenter	• Heather Flory

Agenda

SIRS Home Page and Dashboard

Standard and Advanced Searches

Discussion and Q&A

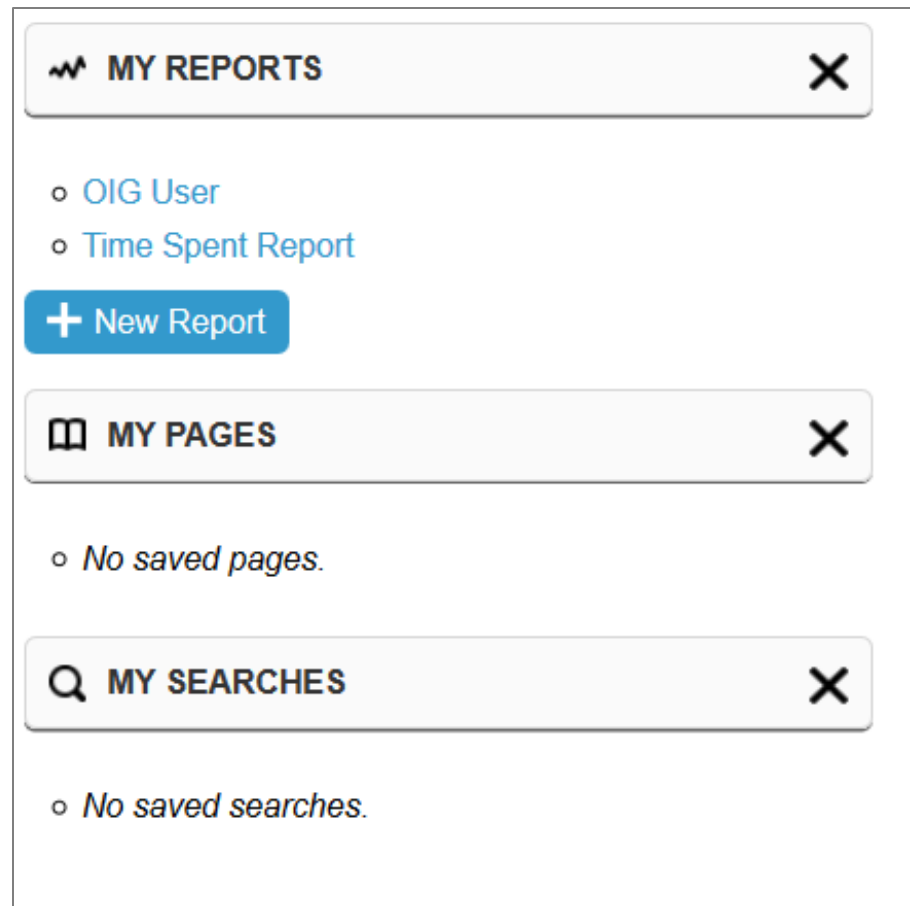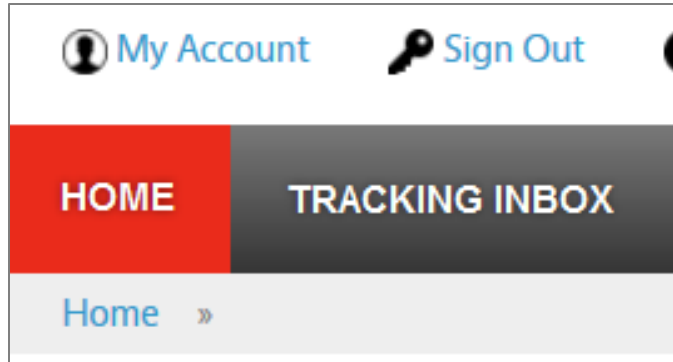# The SIRS Home Page and Dashboard

Related resources:
SIRS Advanced Search Job Aid and SIRS Reports Job Aid

SIRS Home Page

My Account   **Sign Out**

HOME   **TRACKING INBOX**

Home »

MY REPORTS ✕

- OIG User
- Time Spent Report

+ New Report

MY PAGES ✕

- *No saved pages.*

MY SEARCHES ✕

- *No saved searches.*

SMP
Empowering Seniors To
Prevent Healthcare Fraud

SIRS Dashboard: Reports

| HOME | TRACKING INBOX | SEARCH | REPORTING | ADMINISTRATION |

Reporting » Dashboard Options »

My Saved Reports **Shared Reports** **Dashboard Options**

Name	Description	List	Display
OIG User	OIG User	☑	☐
Time Spent Report	Final	☑	☐

Save Cancel

SIRS Dashboard: Advanced Searches

My Saved Searches | Shared Searches | **Dashboard Options**

Name	Data Object	Description	Required Role	Created By	Created On	Last Updated On	List
Sample Search #1 - All Interactions in 2017	Interaction	This sample search provides basic information for all interactions (individual interactions, group outreach and education events, and media outreach and education events) with a date of interaction between January 1, 2017 and December 31, 2017.	SMP Director	Director, Sara (Sara.Director)	11/10/2016 04:11 PM	05/17/2017 12:17 PM	☐
Sample Search #2 - Group Outreach Details in 2017	Interaction	This sample search provides detailed information for group outreach and education events with a date of interaction between January 1, 2017 and December 31, 2017 (which also includes data from these two dates). This search also includes the general information from the previous search, but without the column to indicate whether or not each individual interaction is a complex interaction.	SMP Director	Director, Sara (Sara.Director)	01/06/2017 10:25 AM	05/17/2017 12:18 PM	☐
Sample Search #3 - Media Outreach Details in 2017	Interaction	This sample search provides detailed information for media outreach and education events with a date of interaction between January 1, 2017 and December 31, 2017 (which includes data from the start and end dates). It also includes the general information from the Sample Search #1, but without the column to indicate whether or not each individual interaction is a complex interaction.	SMP Director	Director, Sara (Sara.Director)	01/25/2017 04:19 PM	05/17/2017 12:19 PM	☐
Sample Search #4 - Complex Interactions Details, Part 1	Interaction	This sample search provides all details for complex interactions EXCEPT for Subject details. A separate search is needed to view Subject details (Sample Search #5). Caution - Please note that Date of Interaction is not one of the search criteria for this sample search. This is to ensure that ALL complex interactions appear in the search results - not only the interactions that were entered into SIRS in a specific date range, but also interactions that have been updated since that date.	SMP Director	Director, Sara (Sara.Director)	11/10/2016 12:56 PM	01/06/2017 09:53 AM	☐

Home Page and Dashboard

- SIRS Demonstration
  - Reports
  - Advanced Searches
  - Pages
- Q&A
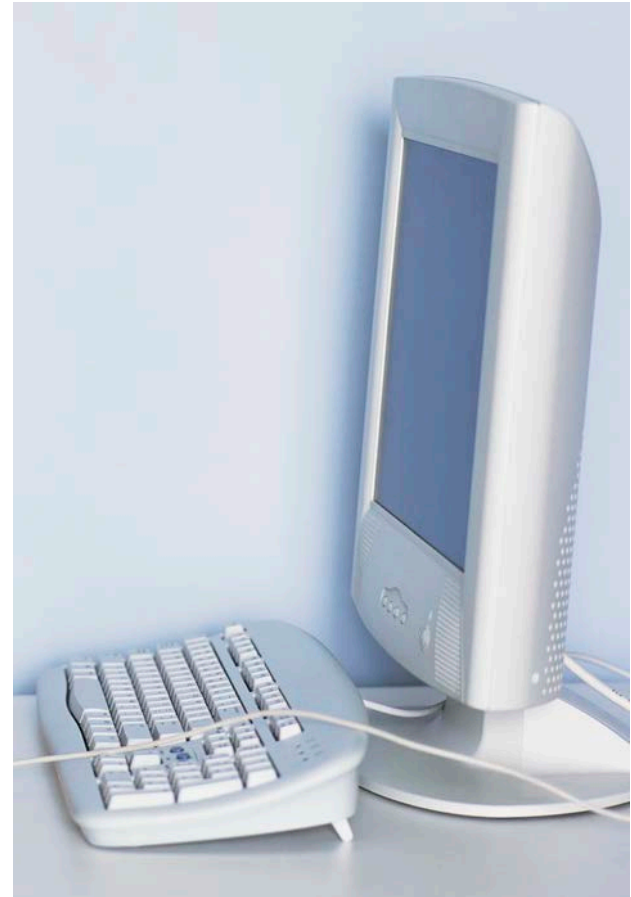
Standard and Advanced Searches

Related resources:
SIRS System User Basics Job Aid and SIRS Advanced Search Job Aid

SIRS Standard Searches

- Search for basic interactions, complex interactions, team members, and their activities

Types of Advanced Searches

Interaction Searches

- "Time spent" by team members that is directly tied to individual interactions and group and media outreach
- General data that is included on all interaction forms: individual, group, and media
- Complex interaction data related to "Additional information," "Beneficiary," and "Subject"
- Group outreach and education details
- Media outreach and education details
- Assignment information

Team Member Searches

- Team member details
- Activities data, including "time spent" by team members that is not directly tied to individual interactions or group or media outreach; details about in-kind, mileage, and non-reimbursed mileage

Advanced Search Menu Options
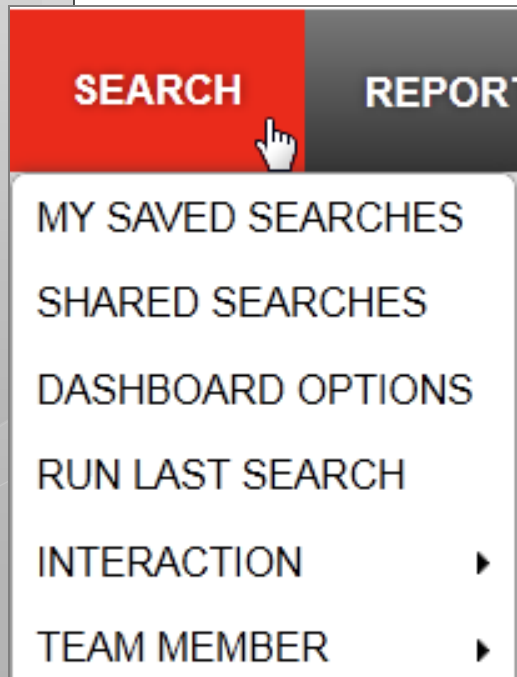
My Saved Searches	• Access searches you have saved.
Shared Searches	• Access searches others have shared with you.
Dashboard Options	• Select searches to appear on your Home Page.
Run Last Search	• Re-run your most recent search.
Interaction > Advanced Search	• Create a new Interaction Advanced Search.
Team Member > Advanced Search	• Create a new Team Member Advanced Search.

SEARCH   REPORT

MY SAVED SEARCHES

SHARED SEARCHES

DASHBOARD OPTIONS

RUN LAST SEARCH

INTERACTION ▶

TEAM MEMBER ▶

Sample Advanced Searches

#1: All Interactions in 2017

#2: Group Outreach Details in 2017

#3: Media Outreach Details in 2017

#4: Complex Interaction Details, Part 1

#5: Complex Interaction Details, Part 2

#6: Team Member Activities in 2017

#7: Team Member Details – All Team Members

Advanced Search Tabs

Search Criteria	Columns	Organizational Unit	Assignments	Display Options	Properties

Search Criteria	• Select the date range and/or other search criteria.
Columns	• Select data fields to include in your search as columns.
Organizational Unit	• Use this tab if you would like to narrow your search by your sites.
Assignments	• Use this tab if you are looking for data entered by or assigned to a particular team member.
Display Options	• Choose the format to receive the search results.
Properties	• Save the search for future use.

Advanced Search: Interaction

- **Search Criteria Tab:** Select the date range and/or other search criteria.

Interaction Search, *continued*

- **Columns Tab:** Select data fields to include in your search as columns.

| Search Criteria | **Columns** | Organizational Unit | Assignments | Display Options | Properties |

Column Selector

Interaction
.Group Outreach and Education
.Individual Interaction
..Beneficiary
..Subject
.Media Outreach and Education
.Assignments

☐ Select All Elements

☑ Case Number
☑ Conducting User
☑ County Location
☑ Date of Interaction
☑ End Date
☑ Label
☑ Notes
☑ Organization
☐ State
☑ State Location
☑ Time Spent
☑ Type of Interaction
☑ Zip Code

Column Selector

Interaction
.Group Outreach and Education
.Individual Interaction
..Beneficiary
..Subject
.Media Outreach and Education
.Assignments

☐ Complainant State
☐ Complainant Zip Code
☑ Complex Issue
☐ Cost avoidance
☐ Date Submitted to ACL
☐ Date of Initial Action

SMP
Empowering Seniors To
Prevent Healthcare Fraud

Interaction Search, *continued*

⦿ **Properties Tab:** Save the search for future use.

Search Criteria	Columns	Organizational Unit	Assignments	Display Options	**Properties**

💾 Save Search   💾 Save As...   🔒 Shared Permissions   🔍 My Saved Searches   🔍 Standard Search

Name	Search 1: All Interactions in 2017
Title	
Description	Search 1: All Interactions in 2017

Interaction Search, *continued*

- **Display Options Tab:** Run the search in Excel format.

| Search Criteria | Columns | Organizational Unit | Assignments | **Display Options** | Properties |

💾 Save Search   💾 Save As…   🔒 Shared Permissions   ❓ My Saved Searches   🔍 Standard Search   **Search**

DISPLAY AS

○ HTML
○ Microsoft Word
◉ Microsoft Excel (Prior to Excel 2007 max rows allowed = 65,536)

Advanced Search: Team Member

Just like Interaction Advanced Searches, select "Search Criteria" and "Columns," then save the search on the "Properties" tab and run it in Excel on the "Display Options" tab.

Standard and Advanced Searches

- SIRS Demonstration
  - Standard Searches
  - Advanced Searches
    - Running shared searches
    - Exporting to Excel
    - Editing the Excel file
- Q&A
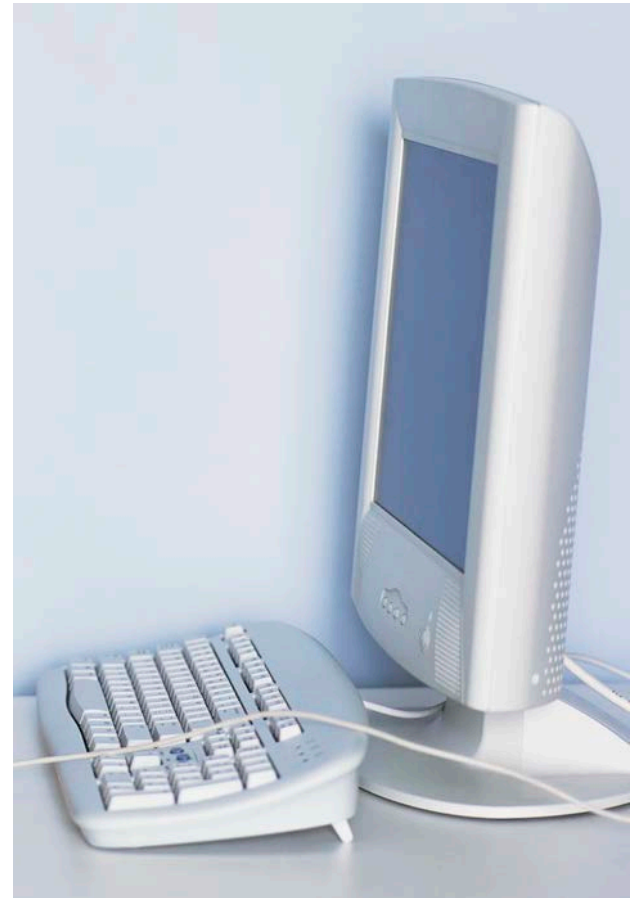
Discussion

What's next in SIRS? Share your enhancement suggestions!

SIRS Resources

www.smpresource.org > Resources for SMPs > SMP Resource Library

ACL's SMP Performance Measures Definitions and Guidance

SMP Resource Center's SIRS Training Plan and Matrix

- SIRS eFile Job Aid and self-paced training
- Introduction to SIRS Training Webinar
- SIRS Team Member Management Job Aid and Training Webinar
- SIRS System User Basics Job Aid and Training Webinar
- SIRS Advanced Search Job Aid, SIRS Reports Job Aid, and SIRS Advanced System User Training Webinar
- SIRS Complex Interactions Job Aid and Training Webinar
- And more!

Next Steps

1 – Review your SIRS resources.

3 – Join us for the SIRS Training Series!

2 – Update your Home page in SIRS and practice using Advanced Searches.

4 – Contact us for help as needed…

Need Help?

SMPs: Help Using SIRS	• **Primary: Sara Lauer, Center: slauer@smpresource.org; 319-874-6859** • Secondary: Nicole Liebau, Center: nliebau@smpresource.org; 319-874-6876
SMP questions about SIRS Training	• Heather Flory, Center: hflory@smpresource.org; 319-874-6844
SMP feedback about SIRS	• Stacey Platte, ACL: stacey.platte@acl.hhs.gov
SIRS technical issues and password reset assistance	• Booz Allen Hamilton Help Desk: Call 301-444-4040 or email BoozAllenSIRSHelpDesk@bah.com to receive a response within 24 hours. SMP directors can also contact your ACL project officer.
SHIP-specific questions and feedback	• Leslie Green, ACL: leslie.green@acl.hhs.gov

Questions?

The production of this presentation was supported by a grant (No. 90NP0003) from the Administration for Community Living (ACL).