User's Guide

Harmony for Aging and Adult Services

SHIP Reporter

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Contents

Overview

SHIP (State Health Insurance Assistance Program) programs provide free counseling to Medicare eligible consumers and their families. Counseling includes information on Medicare, Medicaid, Medigap, long-term care insurance, claims and billing resolution, and information and referral for public benefit programs. Counseling services are available via phone, face-to-face sessions, public education events, and media events. Most counseling is done by volunteers with a nationwide network of 12,000 counselors serving 2.5 million people per year.

SHIPs are funded through grants from the Centers for Medicare and Medicaid Services (CMS). The grant awards require regular reporting from each state to CMS using the CMS SHIPtalk website. Reporting data is collected using the Individual Client Contact (Client Contact), Public and Media (PAM), and Resource Report Forms.

Harmony for Aging and Adult Services SHIP Reporter allows users to:

- Easily record all required data elements for the Client Contact and PAM reports via assessments.
- Review all data entered via summary level reports .
- Transfer data to SHIPtalk via manual entry from printed assessments, the summary reports, or by exporting the data to a file which can be uploaded at the SHIPtalk web portal.

NOTES:	▪ This guide assumes that the user has a basic understanding of using and printing assessments and reports in Harmony for Aging and Adult Services. ▪ Individual states refer to their SHIP programs by other names. The most common variations are SHIIP (State Health Insurance Information and Assistance Program) and HICAP (Health Insurance Counseling and Assistance Program).

Data Collection

SHIP data is collected in Harmony for Aging and Adult Services through the use of assessments. SHIP assessments do not behave any differently than any other assessments, but have been designed to capture all CMS required reporting elements.

Client Contact data is collected using the Client Contact assessment which is accessed through a specific consumer's record or through a call record using Harmony for Aging I&R.

PAM data is collected using the PAM assessment which is located under the Tools → SHIP- PAM Events menu.

Note:	Some numeric fields will automatically display with two decimal places and commas (e.g. 1234 may be displayed as 1,234.00). This is a limitation of the display and will not affect the data on the report. Examples of this can be seen in the “Minutes Spent” and "Counselor Code" fields.

IMPORTANT NOTE:	▪ These assessments should not be changed by the System Administrator if batch reporting is to be used. The batch generation is coded to look for specific question IDs and adding or deleting questions may affect the performance of this feature. ▪ Changes to question prompts are permissible (e.g., Client's DOB can be changed to Consumer's DOB).

Client Contact Data

Client Contact data is specific to a single consumer and is collected using a consumer assessment. The assessment behaves like all other Harmony for Aging and Adult Services assessments and requires no special training.

Client Contact data can be collected anonymously or for a named consumer. Data entry can done from within the consumer's record or from within a call using Harmony for Aging I&R.

IMPORTANT NOTE:	▪ Before getting started, please see "Personalizing Your Default SHIP Reporter Settings" on page 61

Collecting Client Contact Data from a Call Record

Client contact information can be collected from within a specific consumer's record or from within a call. This section details collecting data from within a call record.

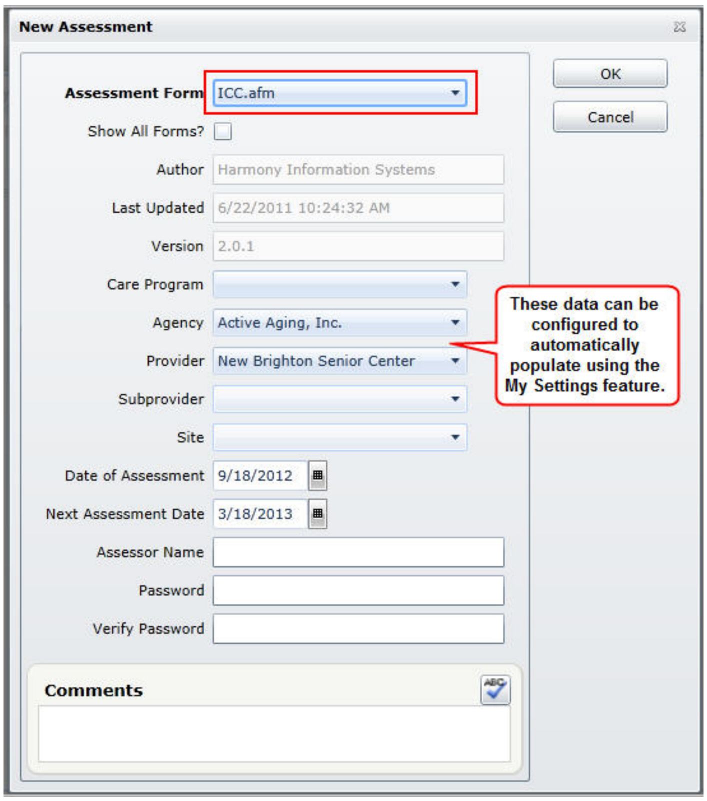
IMPORTANT NOTE:	▪ Recording data from with a call record requires Harmony for Aging Information and Referral. ▪ Please contact your system administrator if your organization already has this feature but you do not have access to it. ▪ Please contact Harmony if your organization does not currently have, but would like to add this feature.

NOTE:	▪ The instructions below assume you are familiar with navigating within and completing assessments in Harmony. Please refer to the SAMS User's Guide if you need additional information about standard assessment functionality.

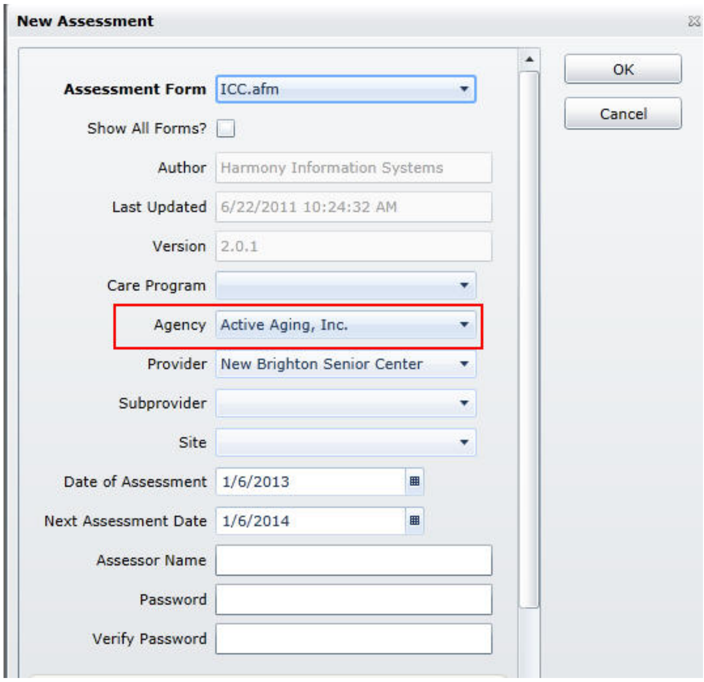
To collect Client Contact data from within a call record

1. In Harmony for Aging and Adult Services, navigate to the **Calls** feature. Begin a call in the usual manner.
   a. Please see the Harmony for Aging I&R User's Guide for more information on Calls.
2. If the caller and/or consumer is known, identify them using the search icon. If the caller and/or consumer is not known or they prefer to remain anonymous, leave the field(s) populated with (Anonymous).
   a. This is the first of two opportunities to identify the caller or consumer. You will also be able to do this when creating the assessment.

3. Click **Add New** in the **Assessments** section. You may be prompted to save any changes that have been made to the call; if you are prompted, click **Save My Changes**.
4. If you did not identify the caller or consumer in the main call record, you can opt to do so now or you can leave them as (Anonymous). To identify the caller or consumer, click the radio button next to the caller or consumer and then click **Search...**
5. Search for the caller or consumer by entering their name, phone, or location and clicking the **Search** button.
6. Highlight the appropriate person and click **OK**.
7. Click the button next to the caller if you want to associate the assessment to the caller. Click the button next to the consumer if you want to associate the assessment to the consumer.
8. Select **ICC.afm** from the Assessment Form drop down menu on the New Assessment screen (ICC is short for Individual Client Contact).



9. Select an Agency. Though not required for most assessment, this data is required for SHIP assessments and ensures that records will be available for inclusion in export files (see "Batch Reporting" on page 43).

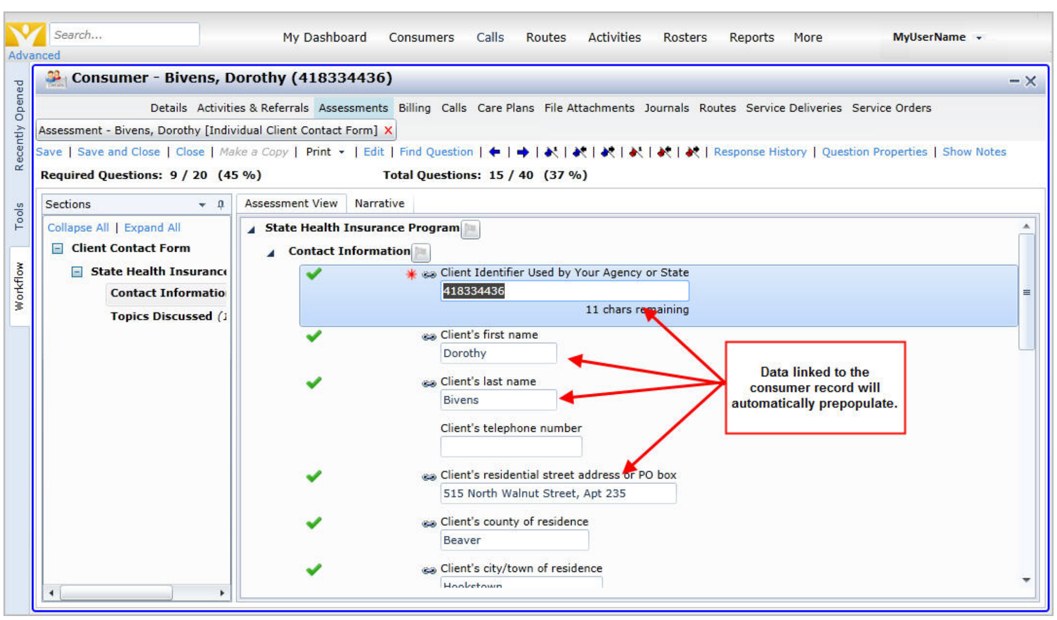


10. If desired or required by your organization, complete the optional data such as Care Program, and Provider. These data can be set to automatically pre-populate for you; please see "Personalizing Your Default SHIP Reporter Settings" on page 61 for more information.

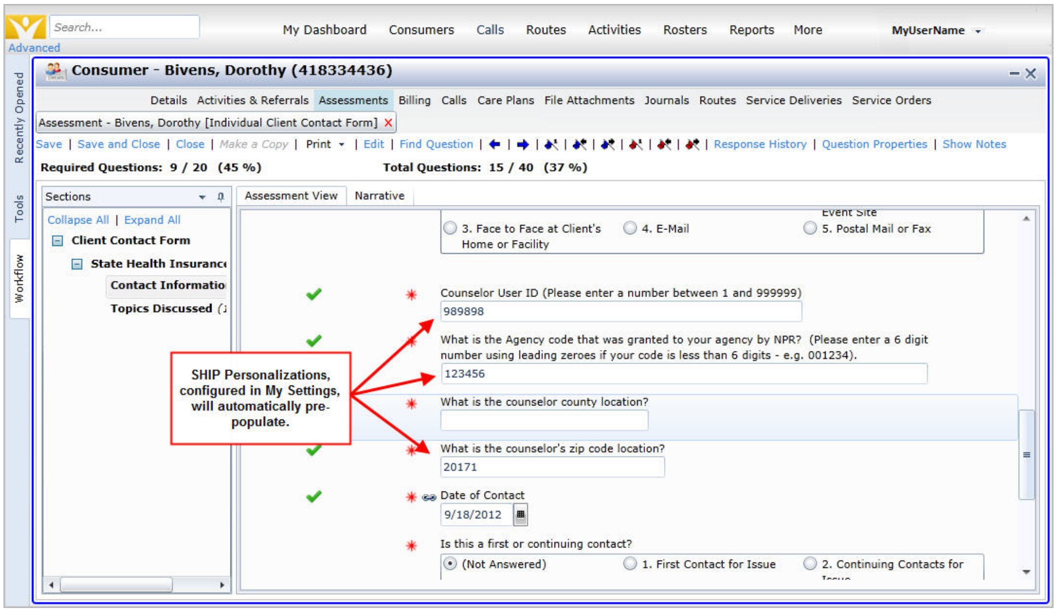
11. Click **OK** to open the assessment.

12. Complete the assessment.

    a. If you identified the consumer in the call record, some data, such as name, age, address, may automatically pre-populate from the consumer's record.

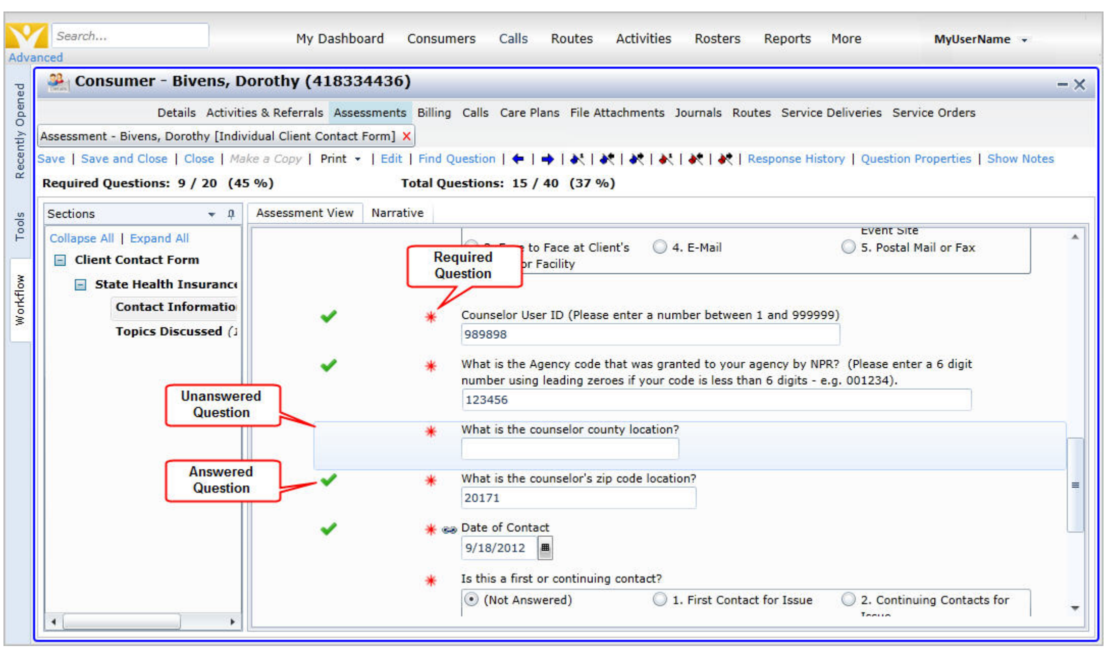


b. Any SHIP Personalization data saved under **My Settings** will also automatically populate (see "Personalizing Your Default SHIP Reporter Settings" on page 61).

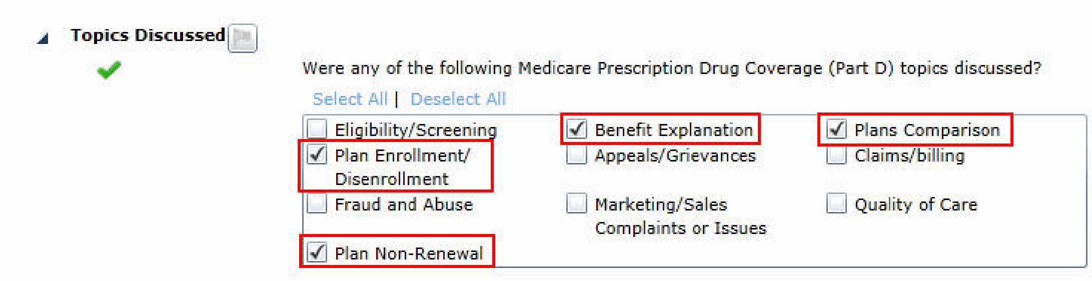


c. All required questions will have a red asterisk next to them. If required data is missing when you save the assessment, a message will be displayed prompting you to complete the missing data.

d. When a question has been answered, a green check mark will appear next to it.

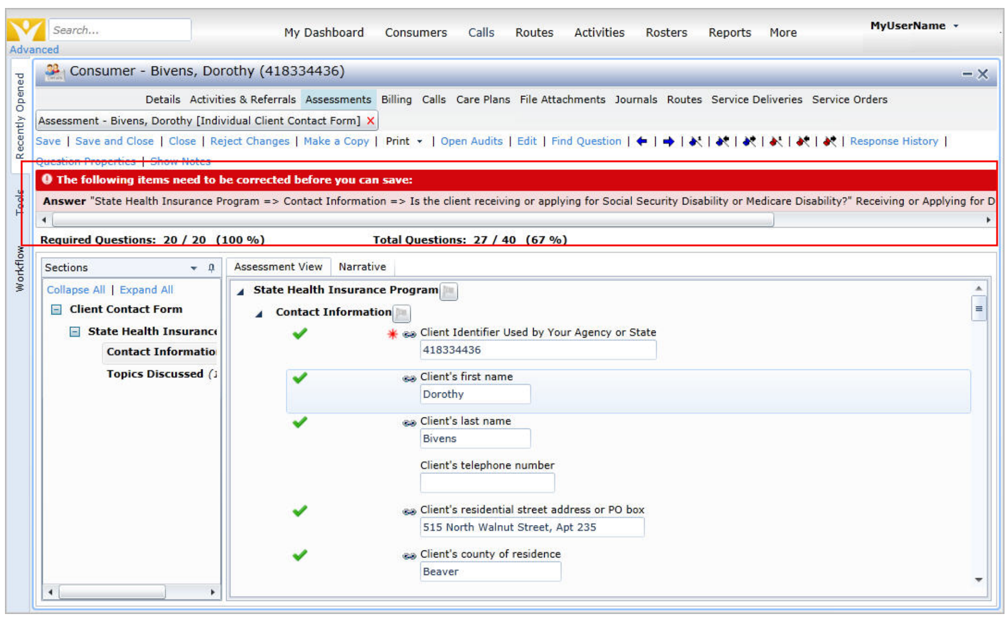


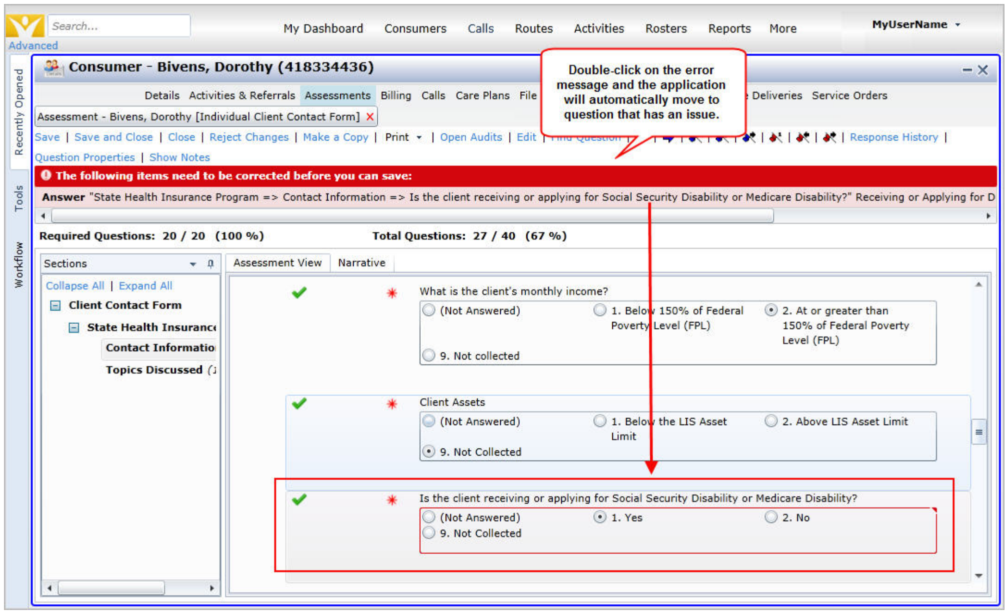
e. a. Some questions permit multiple answers to be recorded; check as many boxes as are applicable.

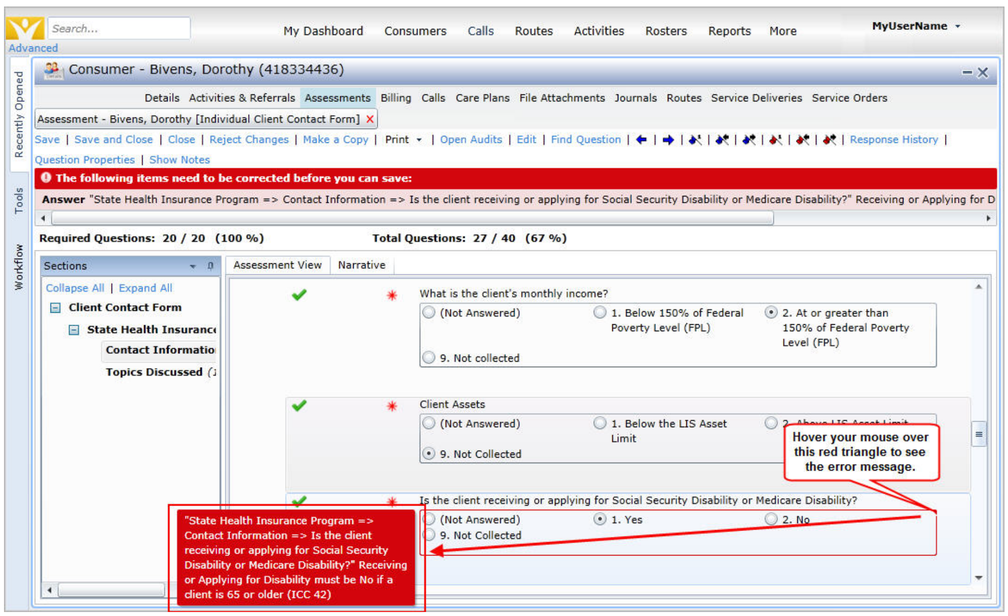


b. Some fields have additional validation. For example,

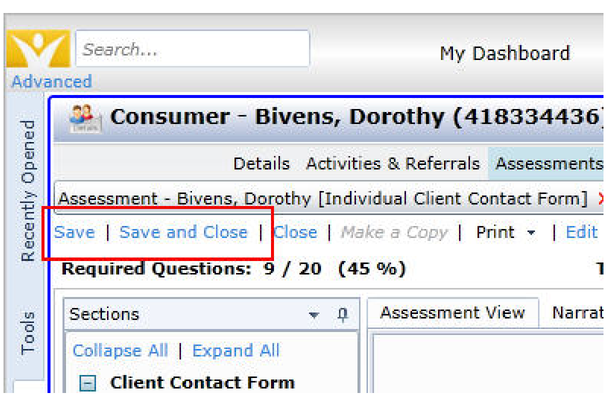
i. If the consumer is over 65 years of age, they cannot answer "Yes" to "Is the client receiving or applying for Social Security Disability or Medicare Disability". If "Yes" is selected and the consumer is over 65, the system will prompt the user to correct the error.







5. Click **Save** or **Save and Close** to save the assessment.



NOTES:

- How does the Client Contact Assessment compare to other assessments?
  - In most respects, the Client Contact Assessment behaves in the same manner as all other assessments in Harmony. The method of accessing, creating, editing, or deleting are all standard. The navigation and "helper" features (e.g., ability to go to next question or next required question) are also standard.
  - The Client Contact Assessment is different from other assessments in that it has special validation logic that is applied when the assessment is saved. This logic enforces all of the validation rules required by CMS to ensure that you capture all required data and that the data meets their requirements. For example, in an assessment that your organization creates, you can indicate if a specific question is required or not. In the Client Contact Assessment, users must answer at least one of several possible topics, but no single topic is required.

Collecting Client Contact Data from the Consumer's Record

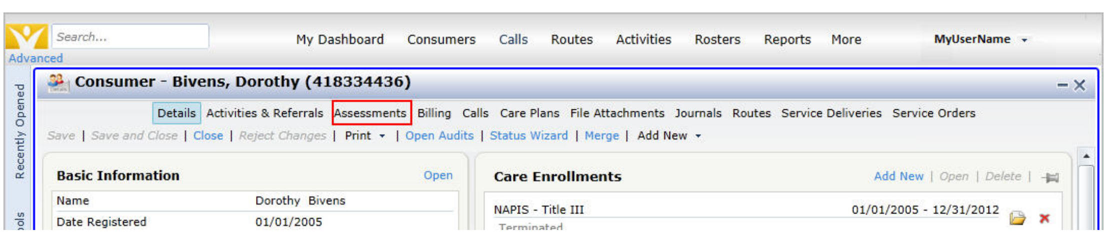
Client contact information can be collected from within a specific consumer's record or from within a call. This section details collecting data from within a consumer's record.

NOTE:

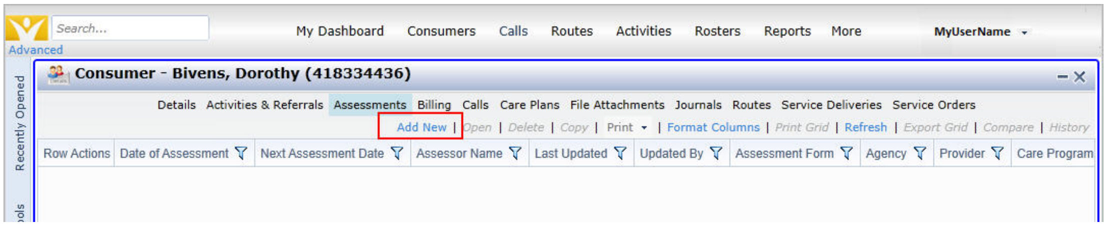
- The instructions below assume you are familiar with navigating within and completing assessments in Harmony. Please refer to the Harmony for Aging User's Guide if you need additional information about standard assessment functionality.

To collect Client Contact data from within a consumer's record

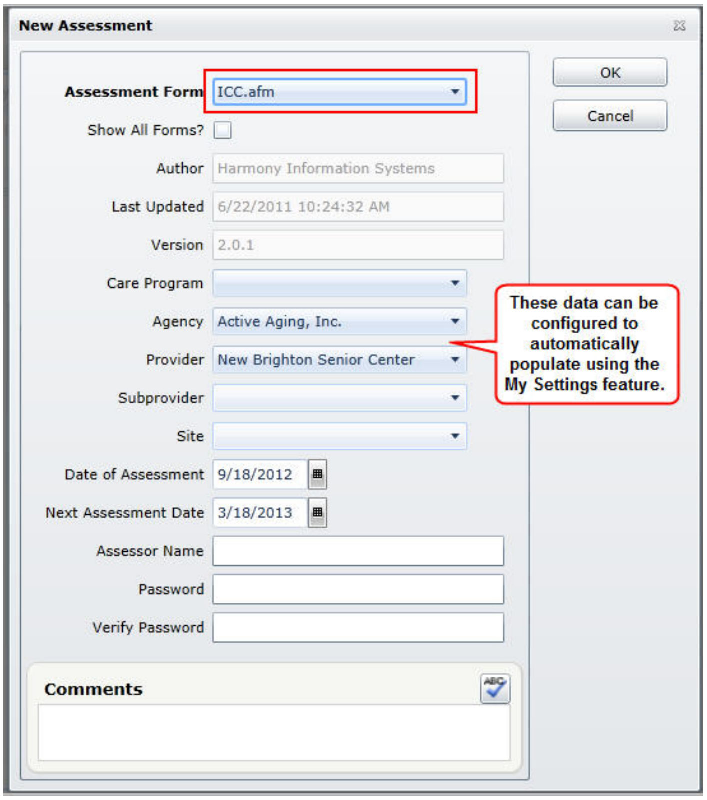
1. In Harmony for Aging and Adult Services, navigate to the consumer's record. If the consumer is not already in the system, add them to the system in the usual manner.
2. Select the **Assessments** option from within the consumer's record.



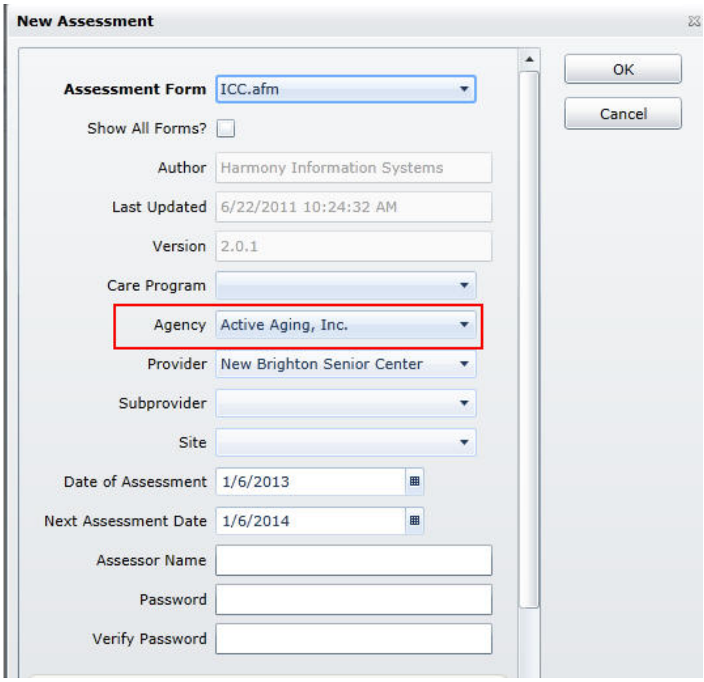
3. Click **Add New**.



4. Select **ICC.afm** from the Assessment Form drop down menu on the New Assessment screen (ICC is short for Individual Client Contact).

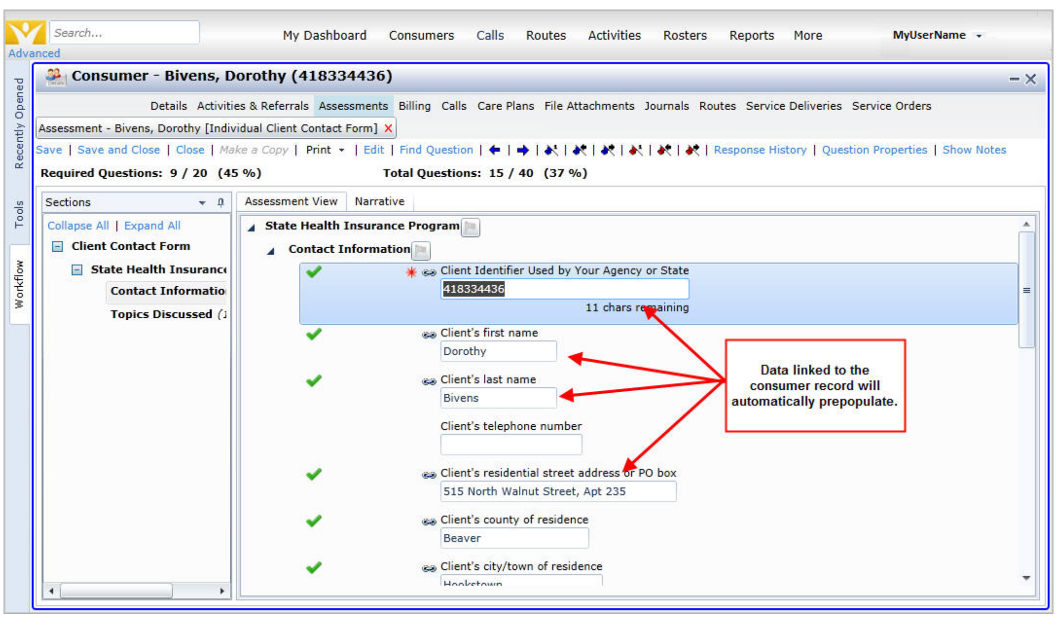


5. Select an Agency. Though not required for most assessment, this data is required for SHIP assessments and ensures that records will be available for inclusion in export files (see "Batch Reporting" on page 43).

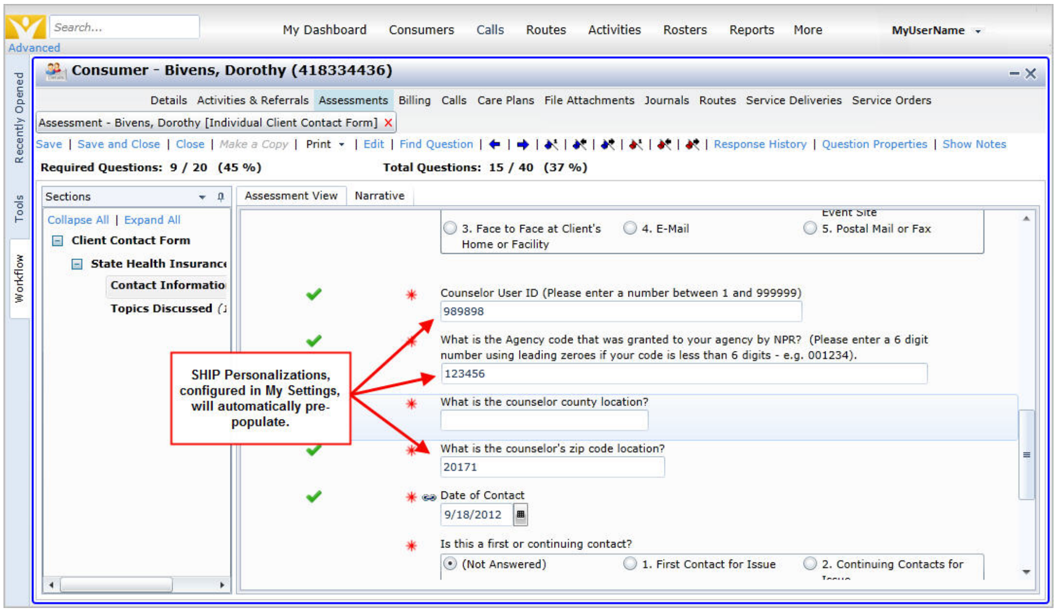


6. If desired or required by your organization, complete the optional data such as Care Program, and Provider. These data can be set to automatically pre-populate for you; please see "Personalizing Your Default SHIP Reporter Settings" on page 61 for more information.
7. Click **OK** to open the assessment.
8. Complete the assessment.

    a. Some data, such as name, age, address, may automatically pre-populate from the consumer's record.

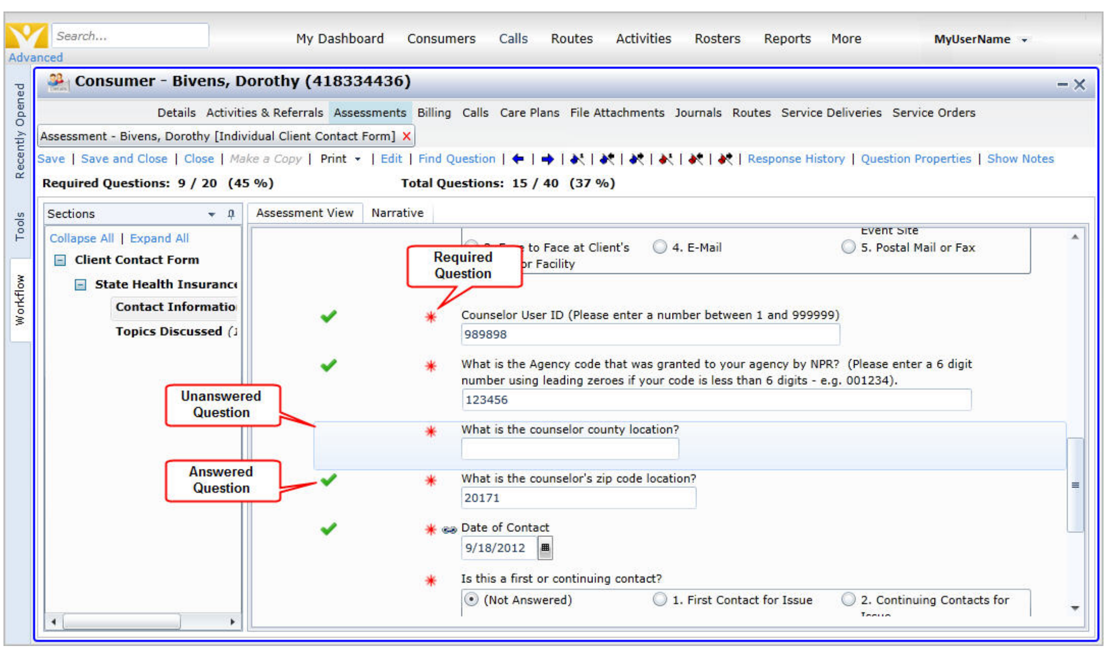


b. Any SHIP Personalization data saved under **My Settings** will also automatically populate (see "Personalizing Your Default SHIP Reporter Settings" on page 61).

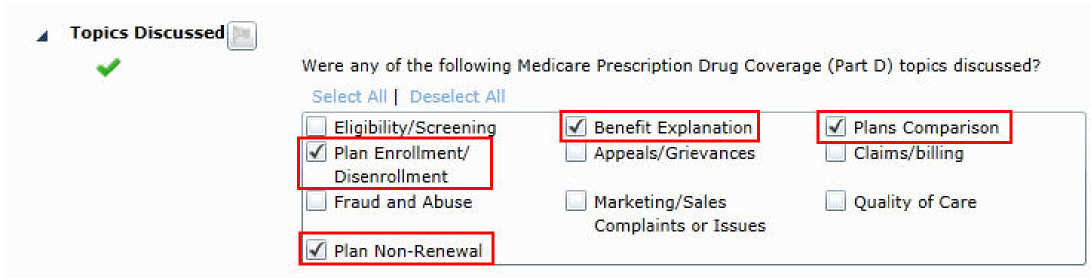


c. All required questions will have a red asterisk next to them. If required data is missing when you save the assessment, a message will be displayed prompting you to complete the missing data.

d. When a question has been answered, a green check mark will appear next to it.

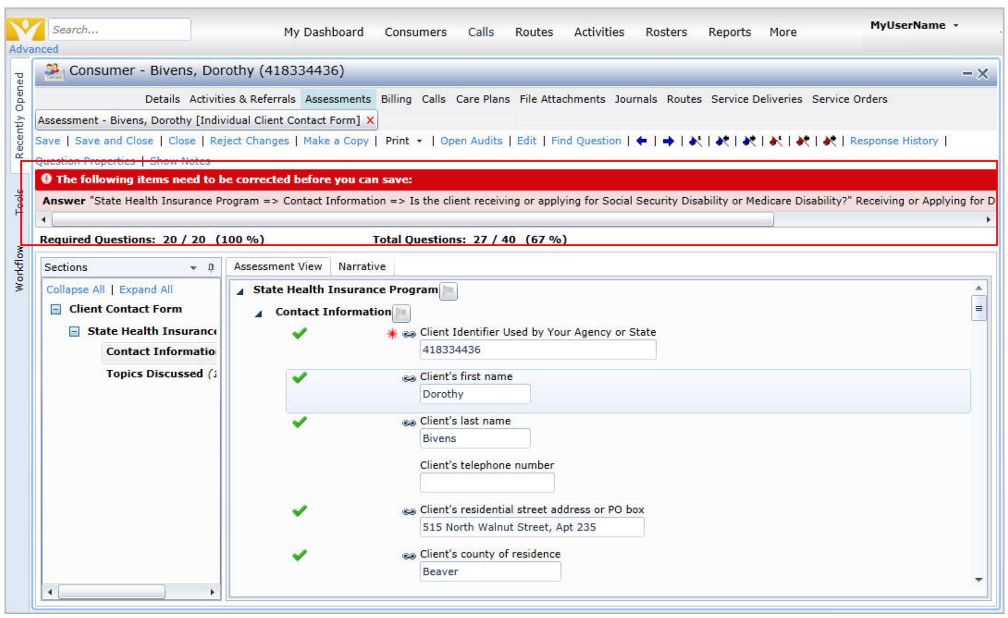


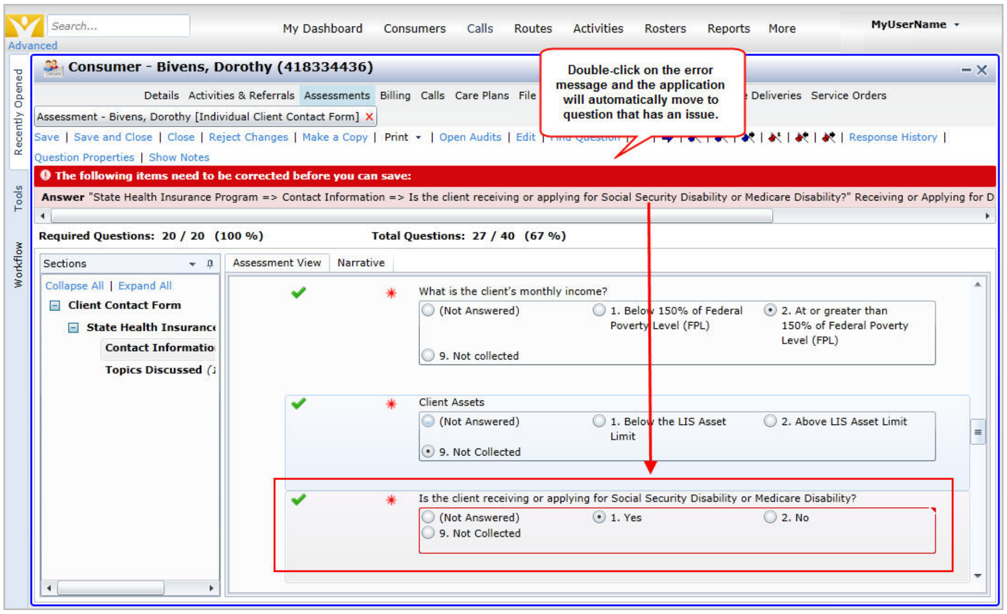
e. Some questions permit multiple answers to be recorded; check as many boxes as are applicable.

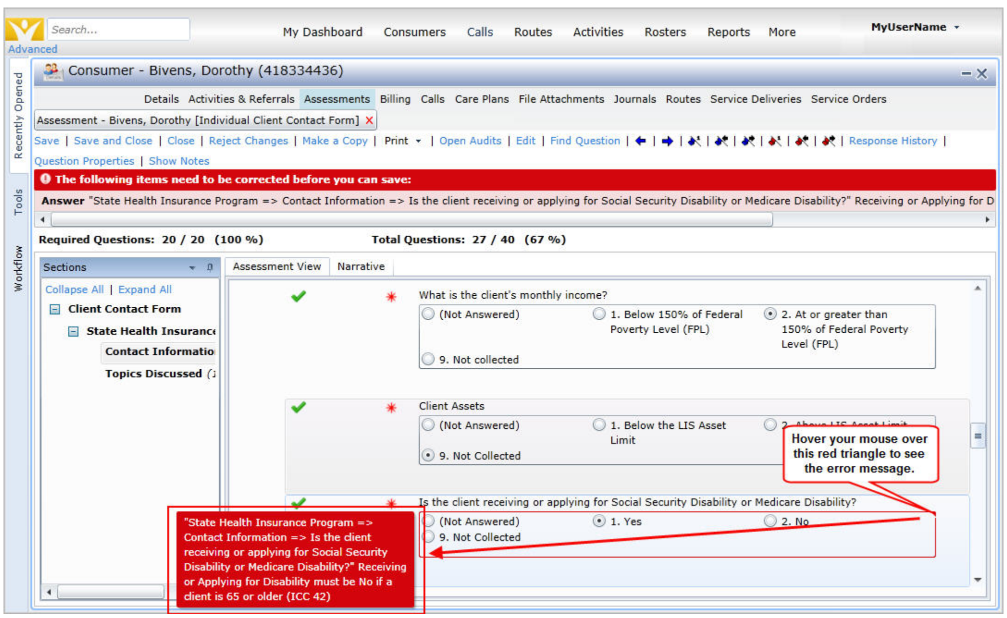


f. Some fields have additional validation. For example,

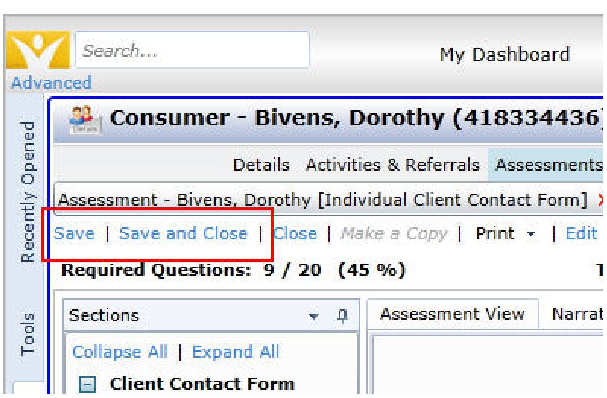
i. If the consumer is over 65 years of age, they cannot answer "Yes" to "Is the client receiving or applying for Social Security Disability or Medicare Disability". If "Yes" is selected and the consumer is over 65, the system will prompt the user to correct the error.







5. Click **Save** or **Save and Close** to save the assessment.



NOTES:	▪ How does the Client Contact Assessment compare to other assessments? ◦ In most respects, the Client Contact Assessment behaves in the same manner as all other assessments in Harmony. The method of accessing, creating, editing, or deleting are all standard. The navigation and "helper" features (e.g., ability to go to next question or next required question) are also standard. ◦ The Client Contact Assessment is different from other assessments in that it has special validation logic that is applied when the assessment is saved. This logic enforces all of the validation rules required by CMS to ensure that you capture all required data and that the data meets their requirements. For example, in an assessment that your organization creates, you can indicate if a specific question is required or not. In the Client Contact Assessment, users must answer at least one of several possible topics, but no single topic is required.

Recording Service Deliveries

Your organization may ask you to record a service delivery after completing a Client Contact Assessment. This is especially common when an organization has been subcontracted to field SHIP questions and will need to bill the contracting organization (e.g., your state's SHIP program). This can be easily done at the conclusion of a call or from within a consumer's record.

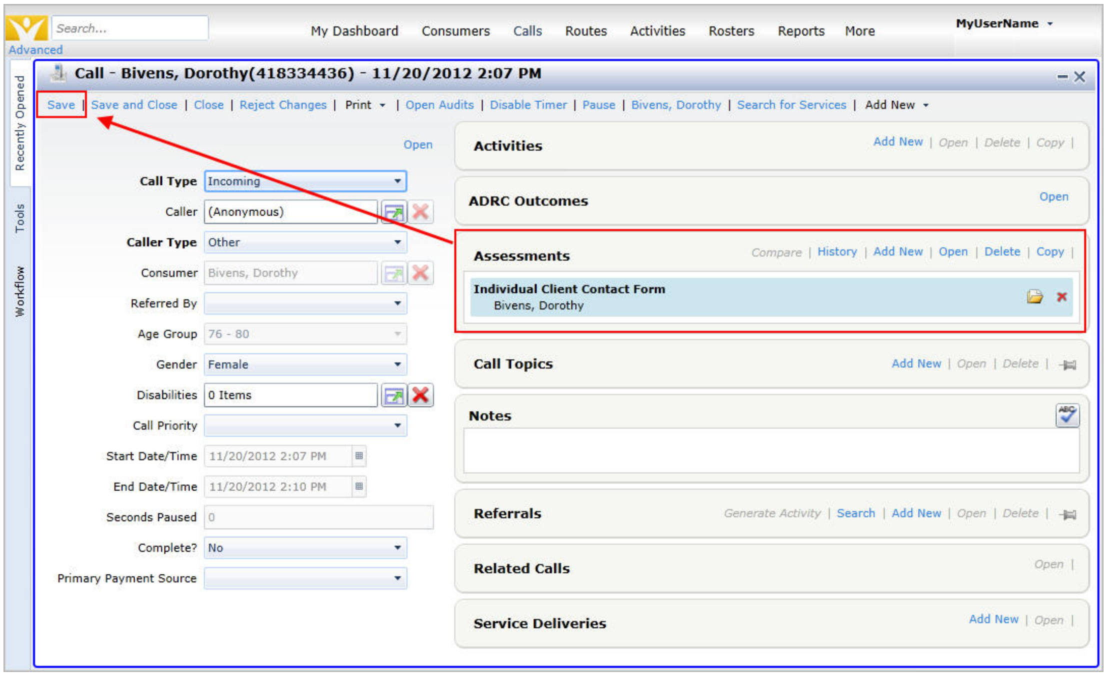
Recording a SHIP Service Delivery After a Call

Recording service deliveries after completing an assessment from within call is easily accomplished using Harmony for Aging's Service Template feature.

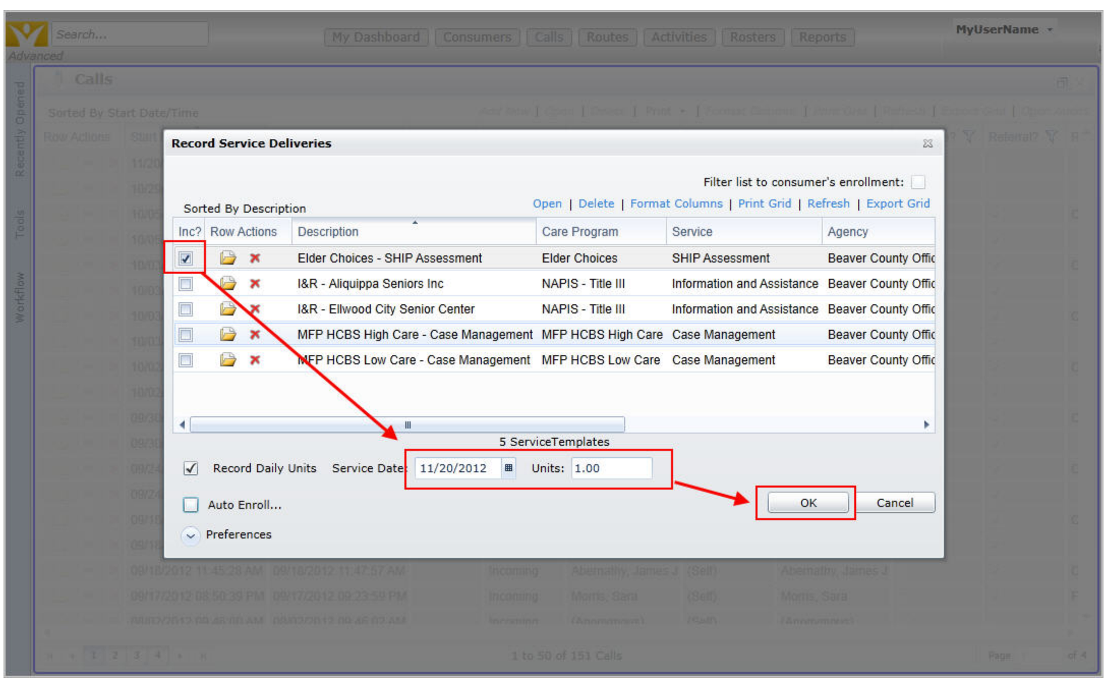
NOTE:	▪ This section assumes that you are familiar with recording calls using Harmony for Aging Information and Referral. Please see the Harmony for Aging Information and ReferralThis section assumes that the appropriate service templates have already been created. "Creating a Service Template" on page 63 for more information if you need to create a service template. ▪ This section assumes that your settings have been configured to allow you to record service deliveries from within a call. "Adjusting Call Service Delivery Options" on page 65

To record a service delivery after a call

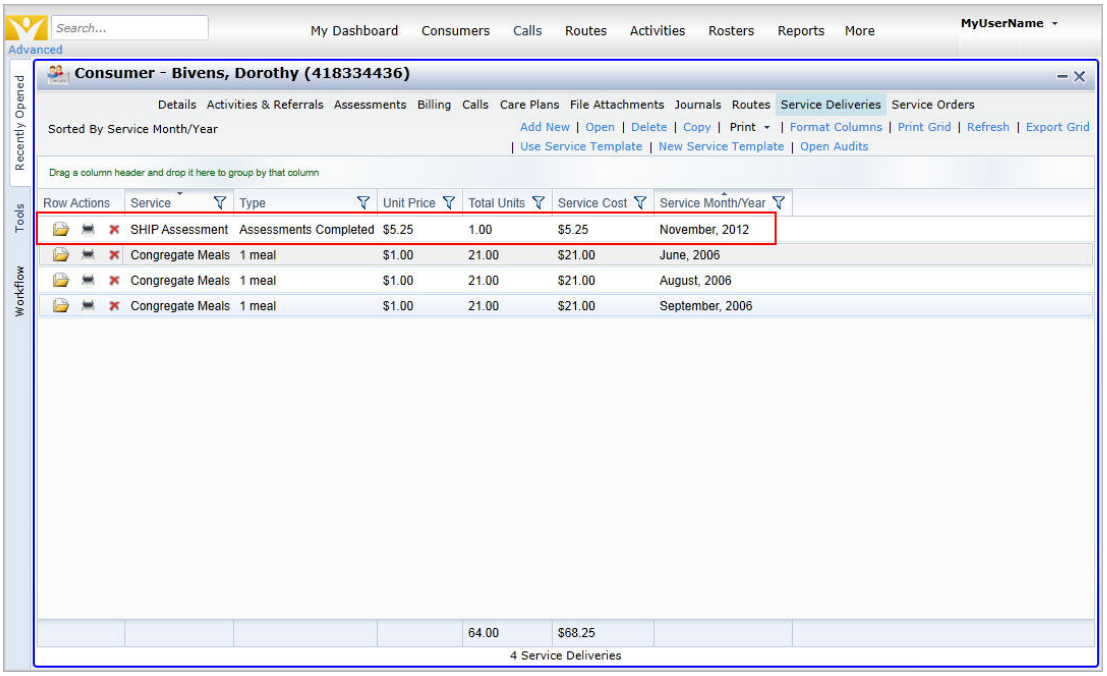
1. Record the call in the normal manner.
2. While in the call record, complete an Client Contact Assessment.
3. **Save** the call. A dialog box will be displayed, prompting you to select which service deliver(ies) you'd like to record.



4. Select the appropriate service deliver(ies).
5. Enter or edit the **Date** and **Units**.
6. If appropriate, check **Auto-Enroll**. This is a feature of Harmony for Aging I&R - please see the Harmony for Aging I&R User's Guide for more information.
7. Click **OK**.



8. **Close** the call record.
9. If you navigate to the consumer's record, you can see the service delivery which was created.



NOTE:	▪ If you are not prompted to record a service delivery or if you forget and need to add one at a later time, open the call record and select Add New Service Delivery from then menu at the top of the screen.

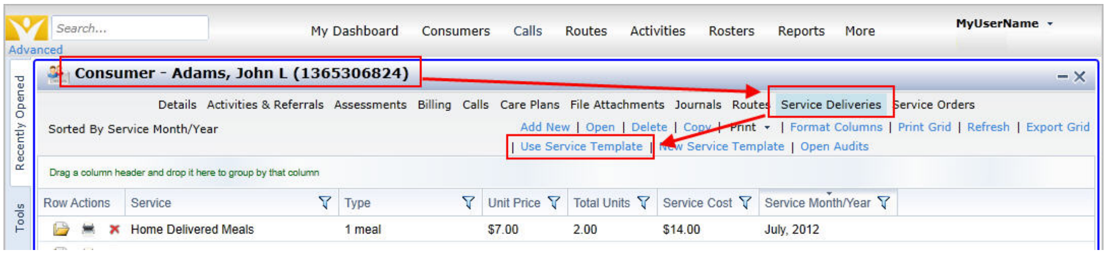
Recording a Service Delivery in a Consumer's Record

Recording service deliveries after completing an assessment from within a consumer's record is easily accomplished using Harmony for Aging's Service Template feature or by completing the Serv-ice Delivery screen.

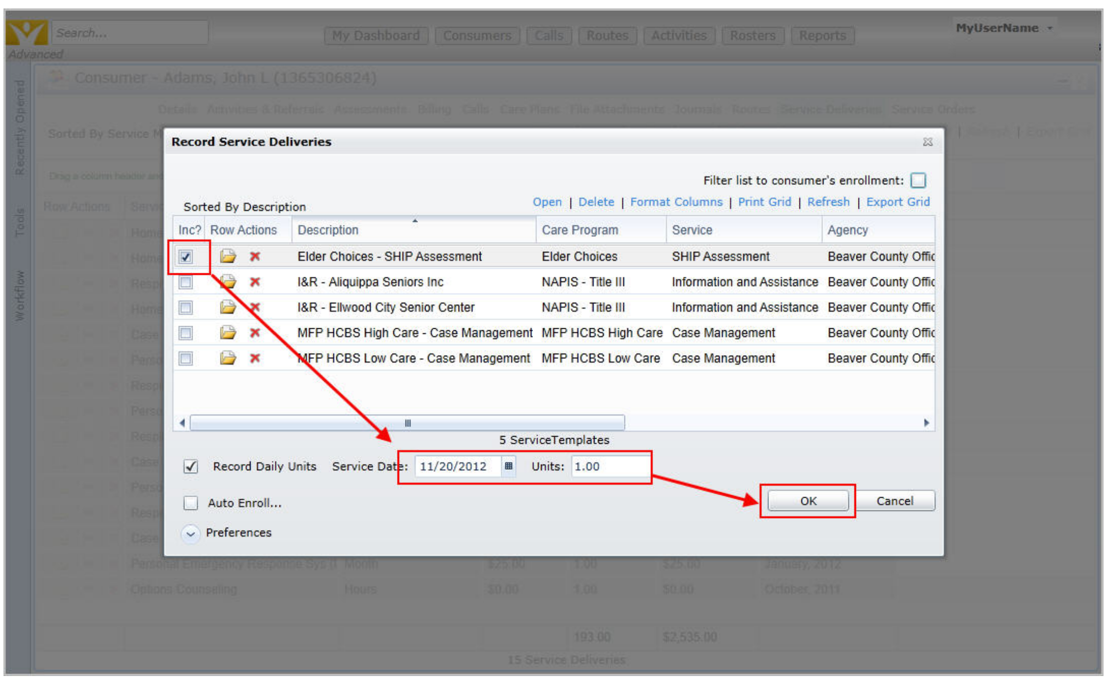
NOTE:	▪ This section assumes that if service templates are going to be used, they have already been created. Please see "Creating a Service Template" on page 63 for more information if you need to create a service template. ▪ The information on recording a Service Delivery by completing the Service Delivery screen reflects the minimum necessary steps. Please see the Harmony for Agin-gUser's Guide for additional options.

To record a service delivery from a consumer's record using a service template

1. Open the appropriate consumer's record and complete the assessment in the normal manner.
2. Click on **Service Deliveries**.
3. Click **Use Service Template** from the menu at the top of the screen.

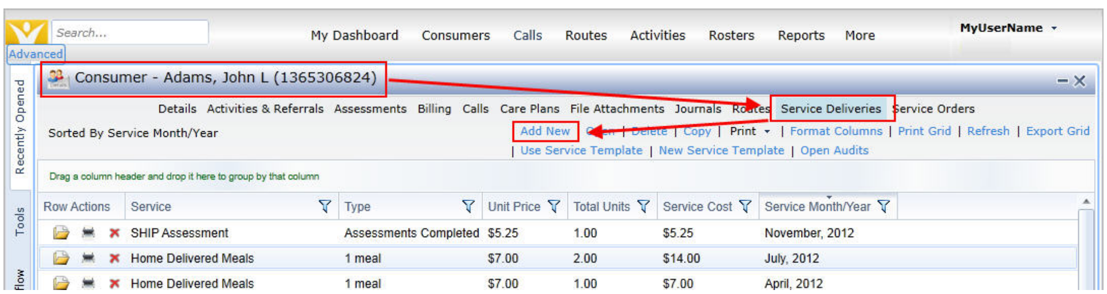


4. Select the appropriate SHIP Service Delivery.
   a. If you don't see the appropriate service, uncheck Filter list to consumer's enrollment
5. Enter the **Service Date** and **Units**.
6. If appropriate, uncheck **Auto Enroll**. In most cases, completion of a SHIP Assessment will not lead to enrolling a consumer.
7. Click **OK**.

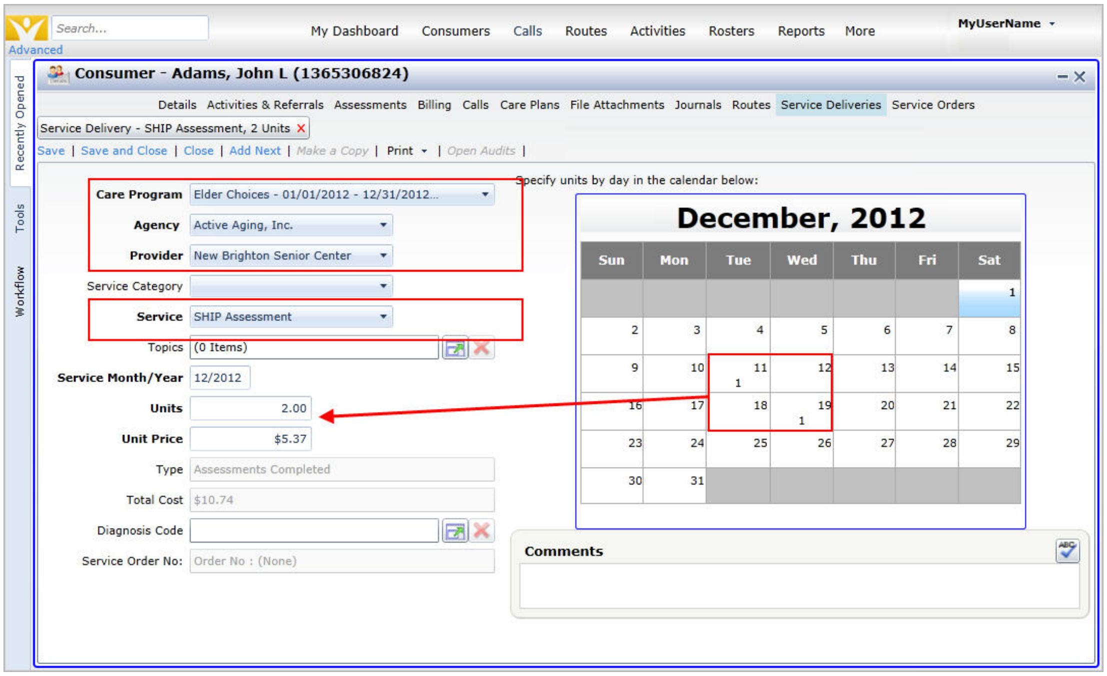


To record a service delivery from a consumer's record using the service delivery screen

1. Open the appropriate consumer's record and complete the assessment in the normal manner.
2. Click on **Service Deliveries**.
3. Select **Add New** from the menu at the top of the screen.



4. Select the appropriate Care Program, Agency, Provider, and Service.
5. If needed, edit the **Service Month/Year**.
6. Enter the **Units**.
    a. Enter your units in the Units field if you want the units to be associated with a particular service month and year, but not a particular day within the month.
    b. Enter your units in the calendar on the right side of the screen if you want to specific dates. The application will automatically sum the units in the calendar and display them in the Units field.



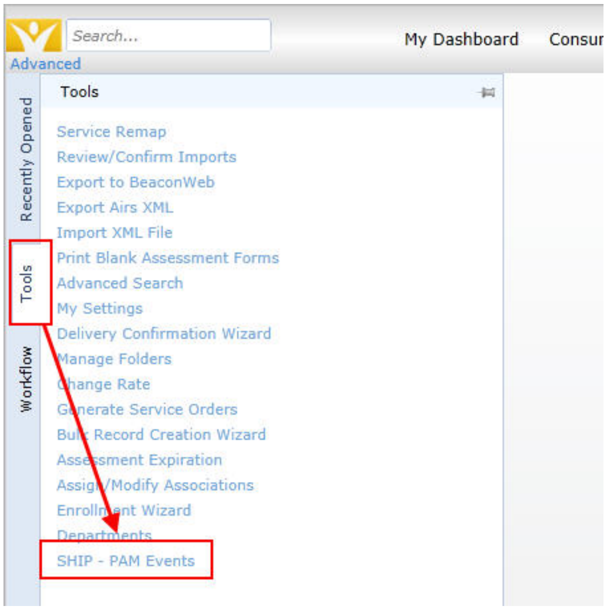
7. **Save and Close** the Service Delivery.

Public and Media Event (PAM) Data

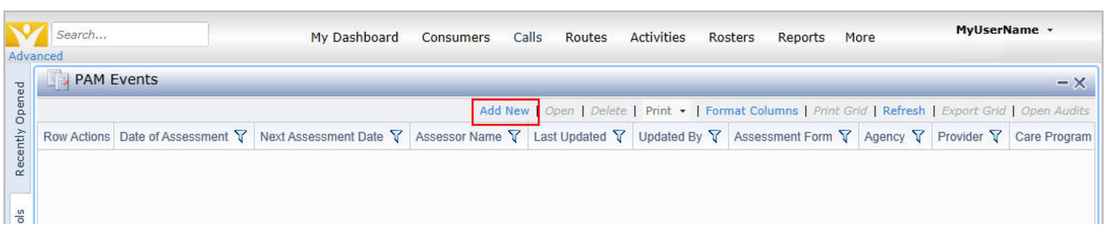
Public and Media Event (PAM) data is not specific to an individual consumer but to a large group of consumers. Assessments in Harmony for Aging normally must be associated with individual consumers, so a special area was added to the application to allow users to record PAM data. In all other respects, the PAM assessment behaves like all other Harmony for Aging and Adult Services assessments and requires no special training.

To collect PAM data

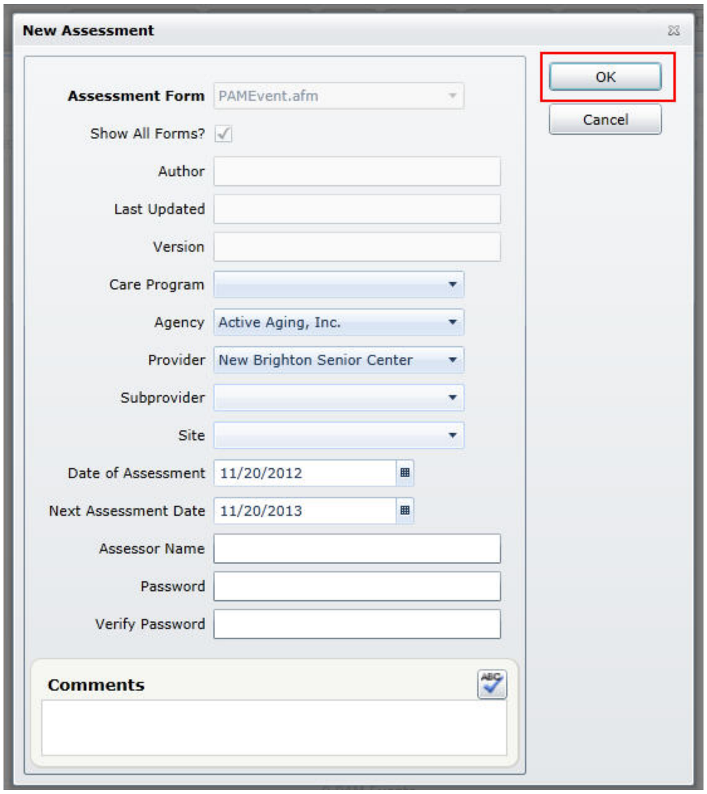
1. Click on the **Tools** menu located on the left side of the screen.
2. Select **SHIP - PAM Events**.



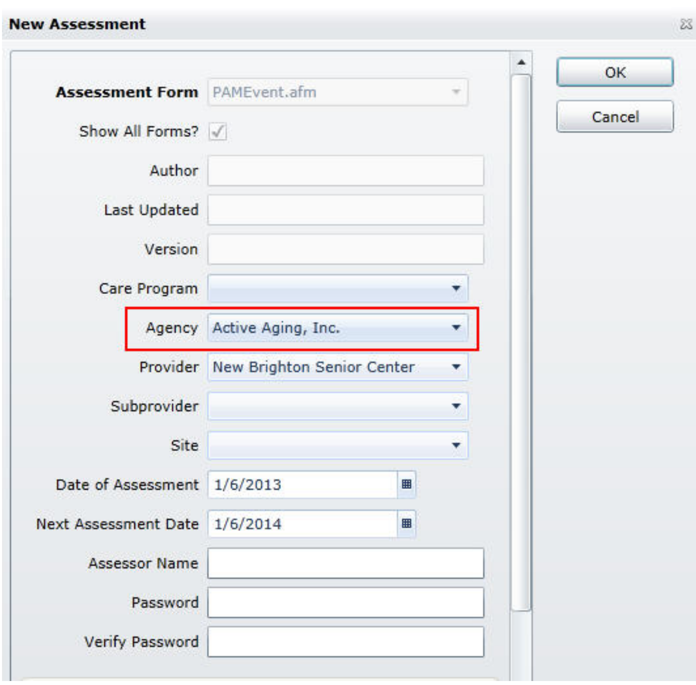
3. If you cannot see this option, either your organization is not licensed for SHIP Reporter or your security permissions do not allow you to see it. Contact your system administrator for assistance.
4. Click **Add New**.



5. The correct assessment, **PAMEvent.afm**, will automatically be selected and cannot be changed

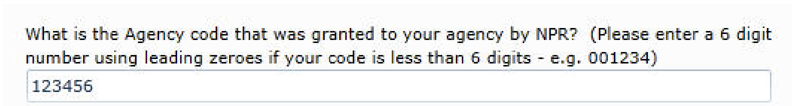


6. Select an Agency. Though not required for most assessment, this data is required for SHIP assessments and ensures that records will be available for inclusion in export files (see "Batch Reporting" on page 43).

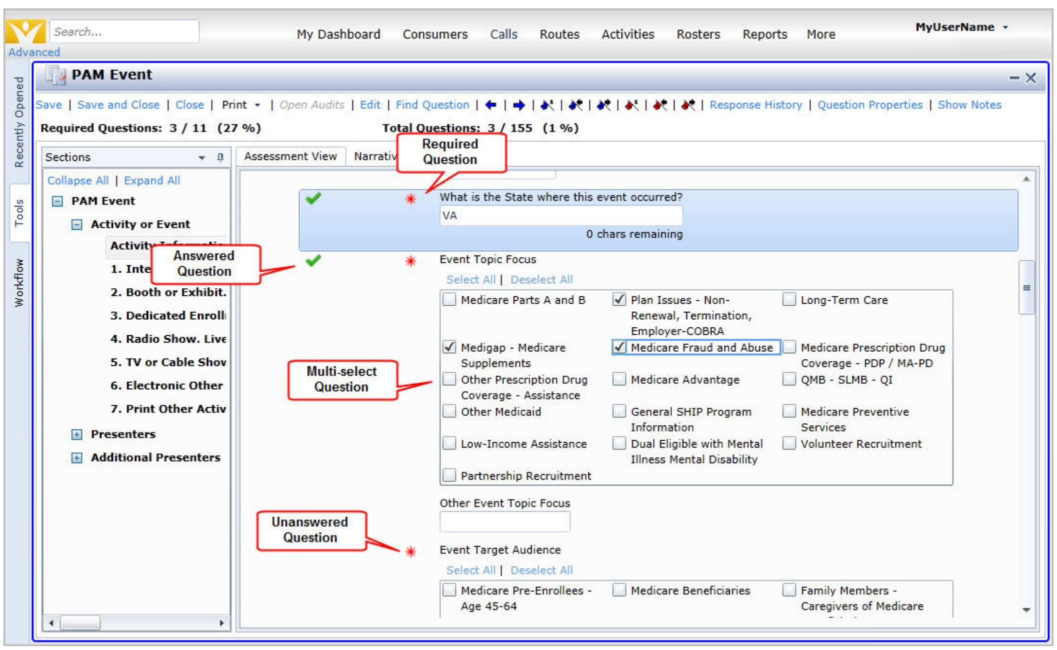


7. If desired or required by your organization, complete the optional data such as Care Program, and Provider. These data can be set to automatically pre-populate for you; please see "Personalizing Your Default SHIP Reporter Settings" on page 61 for more information.
8. Click **OK** to open the assessment.
9. Complete the assessment.

    a. Any SHIP Personalization data saved under My Settings will automatically populate (see "Personalizing Your Default SHIP Reporter Settings" on page 61).

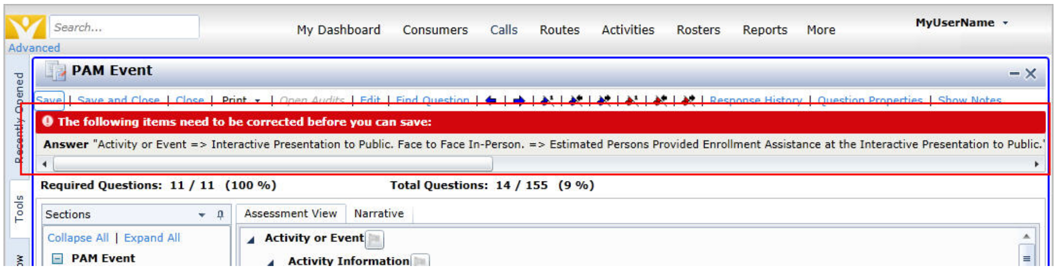


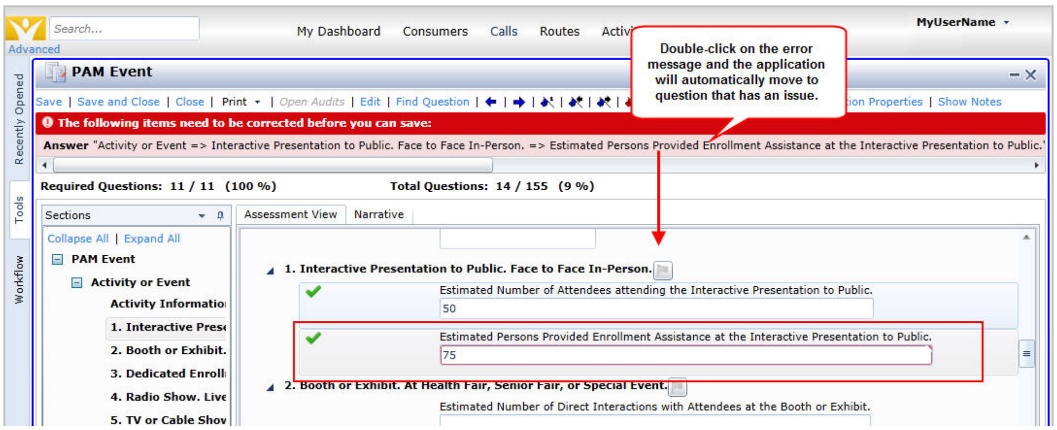
    b. All required questions will have a red asterisk next to them. If required data is missing when you save the assessment, a message will be displayed prompting you to complete the missing data.
    c. When a question has been answered, a green check mark will appear next to it.
    d. Some questions permit multiple answers to be recorded; check as many boxes as are applicable.

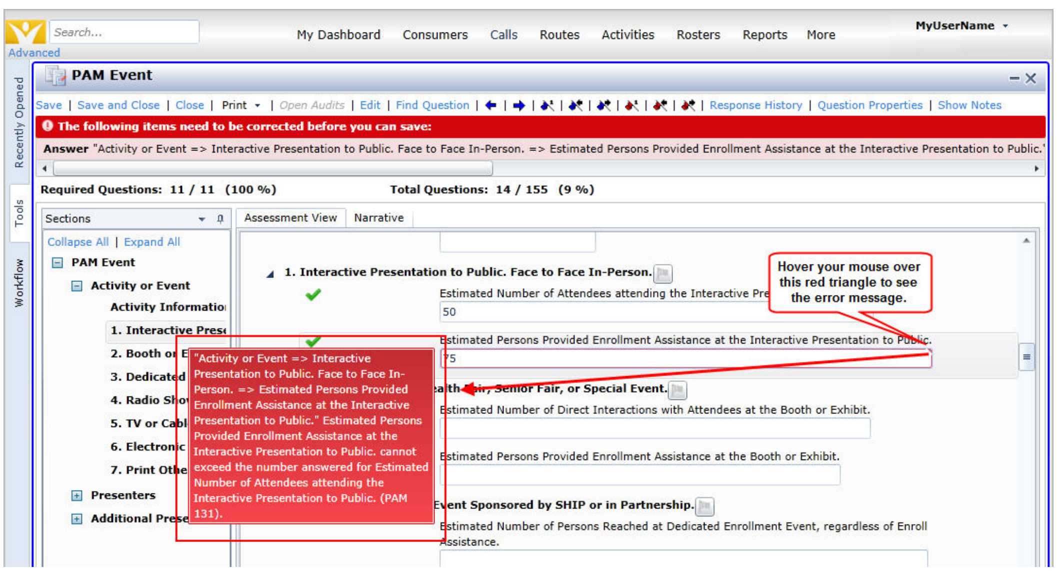


    e. Some fields have additional validation. For example,

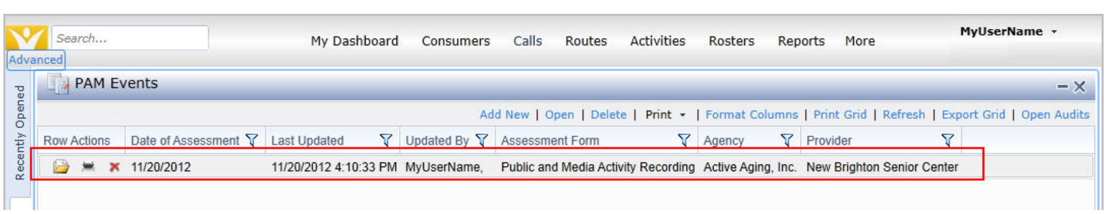
        i. If the activity or event is Interactive Presentation to the Public, then the number of people that received enrollment assistance must be less than or equal to the total number of people that attended the event. The system will prompt the user to make corrections if the number of people that received enrollment assistance exceeds the total number of people that attended.







5. Click **Save** or **Save and Close** to save the assessment.



NOTES:	
NOTES:	▪ How does the PAM Assessment compare to other assessments? ◦ In most respects, the PAM Assessment behaves in the same manner as all other assessments in Harmony. The method of creating, editing, or deleting are all standard. The navigation and "helper" features (e.g., ability to go to next question or next required question) are also standard. ◦ The PAM Assessment is different from other assessments in two ways: ▪ It is not associated with an individual consumer. ▪ It has special validation logic that is applied when the assessment is saved. This logic enforces all of the validation rules required by CMS to ensure that you capture all required data and that the data meets their requirements. For example, in an assessment that your organization creates, you can indicate if a specific question is required or not. In the PAM Assessment, users must select at least one of several possible event types, but no single type is required.

Reports

Reports can be used to evaluate program performance, to identify trends or "hot" topics in your SHIP population, and to monitor reporting to CMS, especially when used in conjunction with reports generated on the SHIPtalk website.

Client Contact Summary Report

The Client Contact Summary report shows aggregated Client Contact data captured in Harmony for Aging. This data can be used to monitor the number of clients receiving SHIP services and, when compared to reports generated from SHIPtalk, in monitoring the transfer of data from Harmony to CMS.

Client Contact Report Characteristics

The following options are available for the **Client Contact Summary Report**.

Report Characteristic	Notes
Title	Standard; behaves in the same way as all other reports
Subtitle	Standard; behaves in the same way as all other reports
Description	Standard; behaves in the same way as all other reports
Shared with	Standard; behaves in the same way as all other reports
Modifications allowed	Standard; behaves in the same way as all other reports
Comments	Standard; behaves in the same way as all other reports

Client Contact Report Parameters

The following settings and filters are available for the **Client Contact Summary Report**.

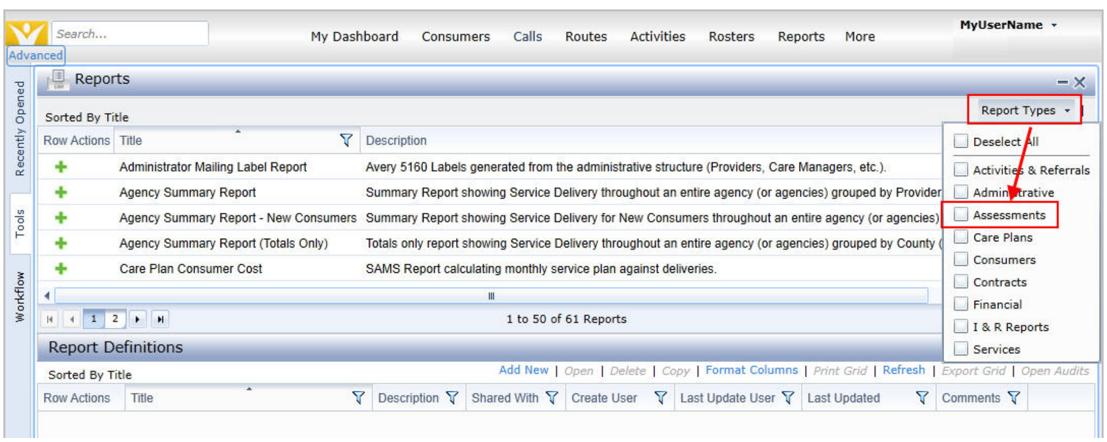
Available values	Notes
Report Settings	
Print Parameters	
Print Consumer Details	This filter will not affect the data in the report and will be removed in a future release. Please do not use this filter.
Report Settings	
Date of Assessment (on or after)	Uses the assessment date, NOT the contact or activity date
Date of Assessment (on or before)	Uses the assessment date, NOT the contact or activity date

Available values	Notes
Assessor Name Like	
Counselor User ID	
Assessment Agency	
Assessment Provider	
Assessment Care Program	
Assessment Site	
Counselor Location Zip Code	
Client Location Zip	
Client Location County	

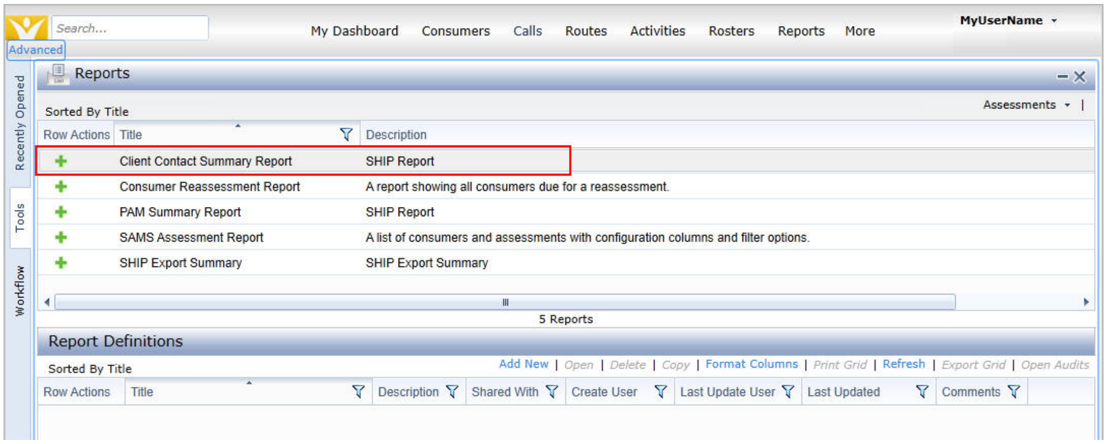
Running the Client Contact Summary Report

To run the Client Contact Summary Report

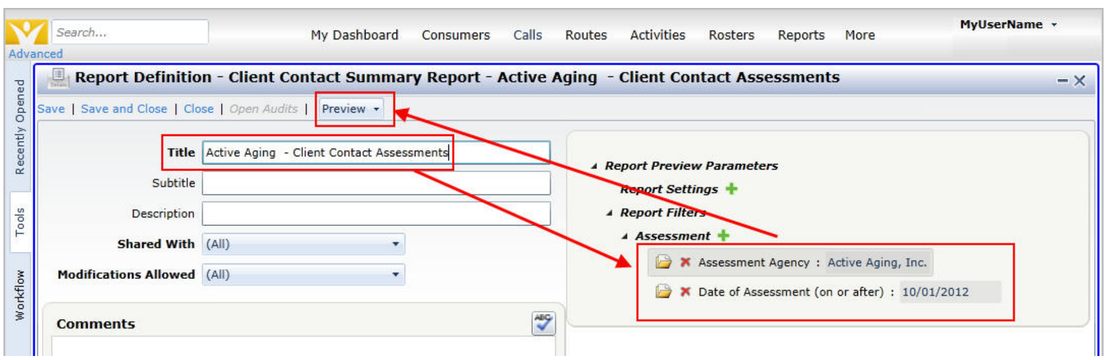
1. Navigate to the reports chapter.
2. Select **Assessments** from the **Report Types** menu.



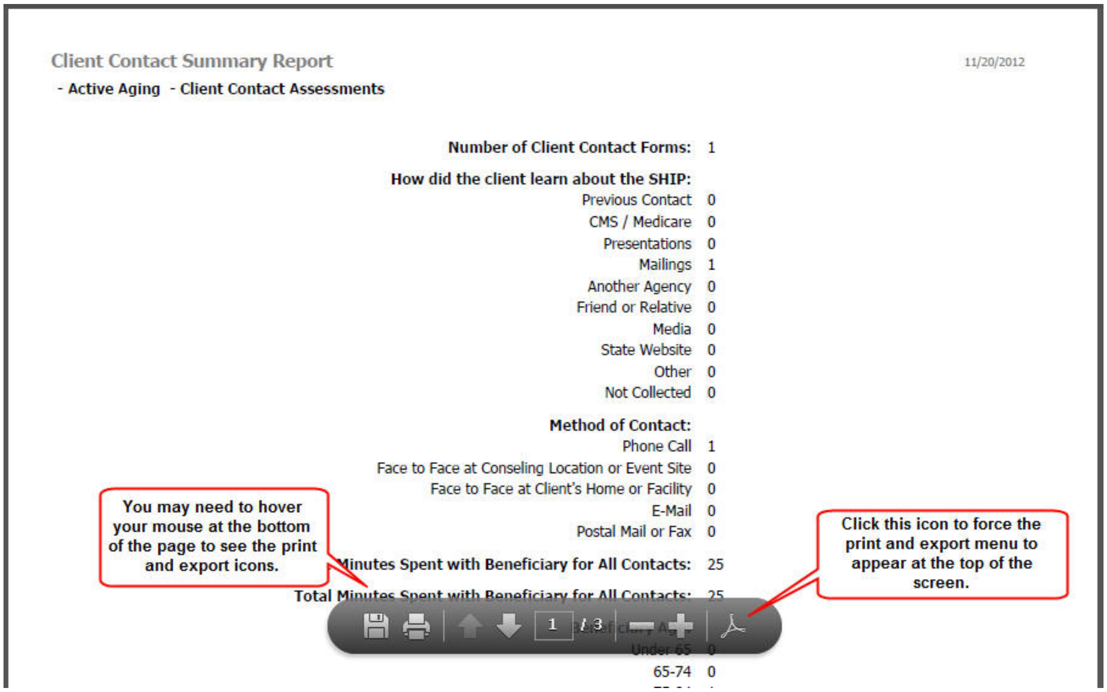
3. Double click on **Client Contact Summary Report** to create a new report definition.
   a. Alternatively, if a saved report definition already exist, double click the appropriate definition.

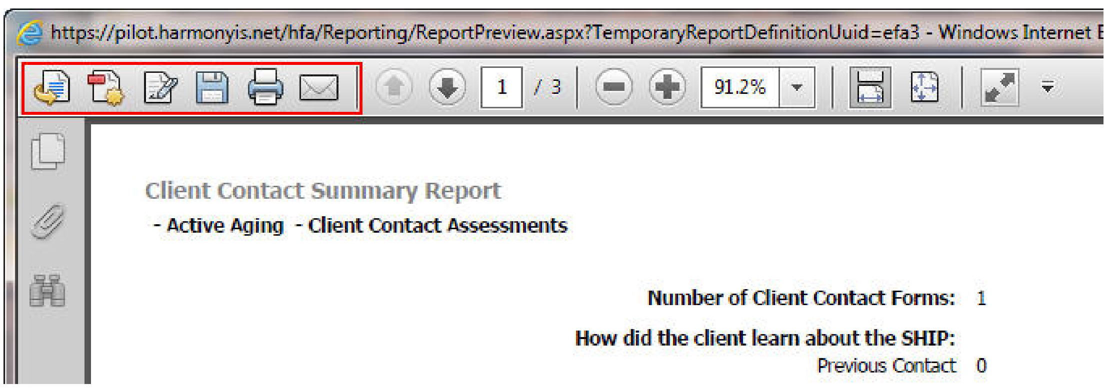


4. Enter a **Title**.
5. If desired, enter a subtitle, description, comments, and modify the security settings.
6. Select the appropriate Parameters. In the example below, we've limited the report to a specific Agency and date range. Please see "Client Contact Report Parameters" on page 29 for a full list of available parameters.



7. Click **Preview**.
8. Save or print the report.
   a. Depending on the version of Adobe Acrobat™ you have installed on your computer, you may need to hover over the bottom of the window to see the print/export options.
   b. You can force a menu to appear at the top of the screen by clicking the Acrobat™ icon.





Notes:	▪ It is critical that the SHIPtalk report and the Harmony report are both created with the same filters if the data is to be compared. ▪ Please see the Harmony for AgingUser's Guide for more information on creating and using report definitions.

PAM Summary Report

The PAM Summary report shows aggregated Public and Media Event data captured in Harmony for Aging. This data can be used to monitor the number and types of events being delivered and, when compared to reports generated from SHIPtalk, in monitoring the transfer of data from Harmony to CMS.

PAM Report Characteristics

The following options are available for the **PAM Summary Report**.

Report Characteristic	Notes
Title	Standard; behaves in the same way as all other reports
Subtitle	Standard; behaves in the same way as all other reports
Description	Standard; behaves in the same way as all other reports
Shared with	Standard; behaves in the same way as all other reports
Modifications allowed	Standard; behaves in the same way as all other reports
Comments	Standard; behaves in the same way as all other reports

PAM Report Parameters

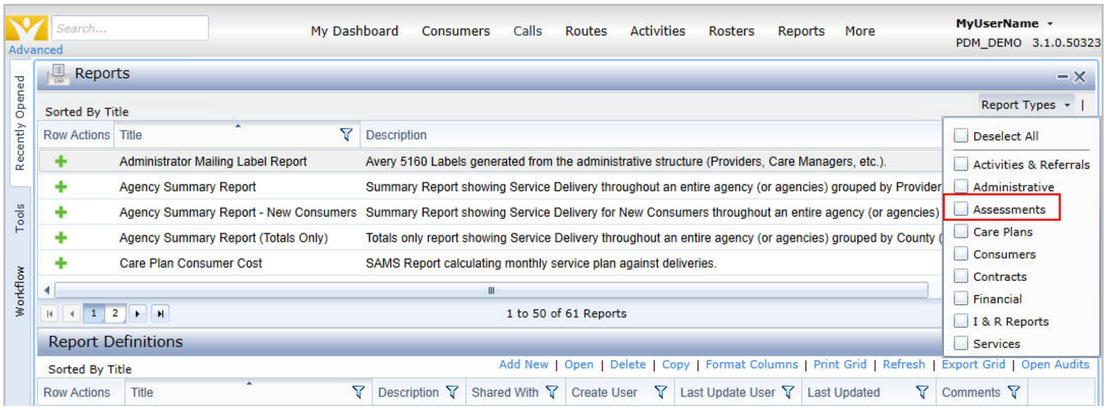
The following settings and filters are available for the **PAM Summary Report**.

Available values	Notes
Report Settings	
Print Parameters	
Print Consumer Details	This filter will not affect the data in the report and will be removed in a future release. Please do not use this filter.
Report Settings	
Date of Assessment (on or after)	Uses the assessment date, NOT the contact or activity date
Date of Assessment (on or before)	Uses the assessment date, NOT the contact or activity date
Assessor Name Like	
Group/Event Name Like	
Counselor User ID	
Assessment Agency	
Assessment Provider	
Assessment Subprovider	
Assessment Care Program	
Assessment Site	

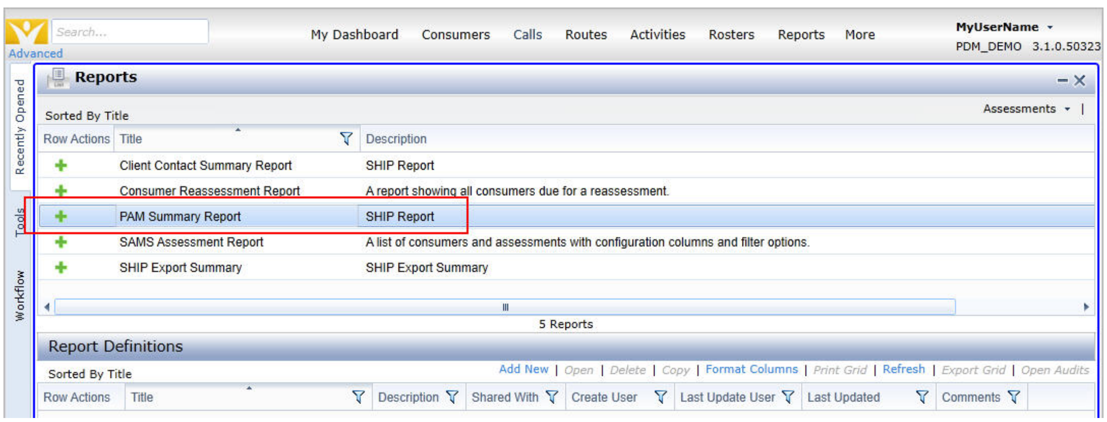
Running the PAM Summary Report

To run the PAM Summary Report

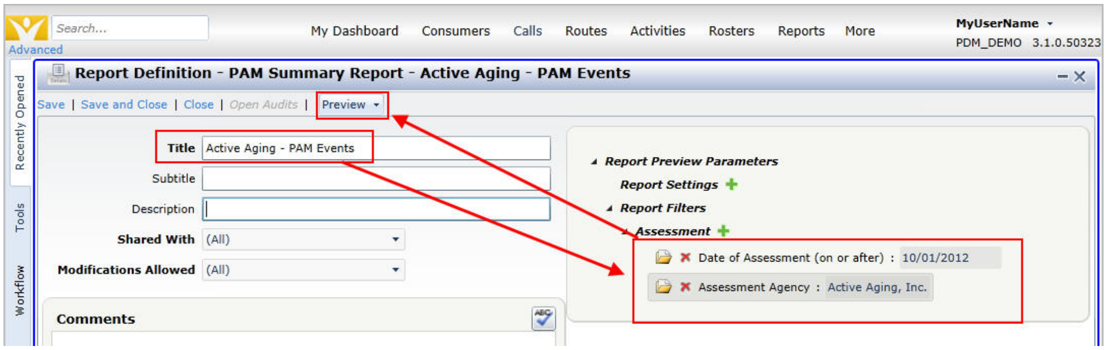
1. Navigate to the reports chapter.
2. Select **Assessments** from the **Report Types** menu.



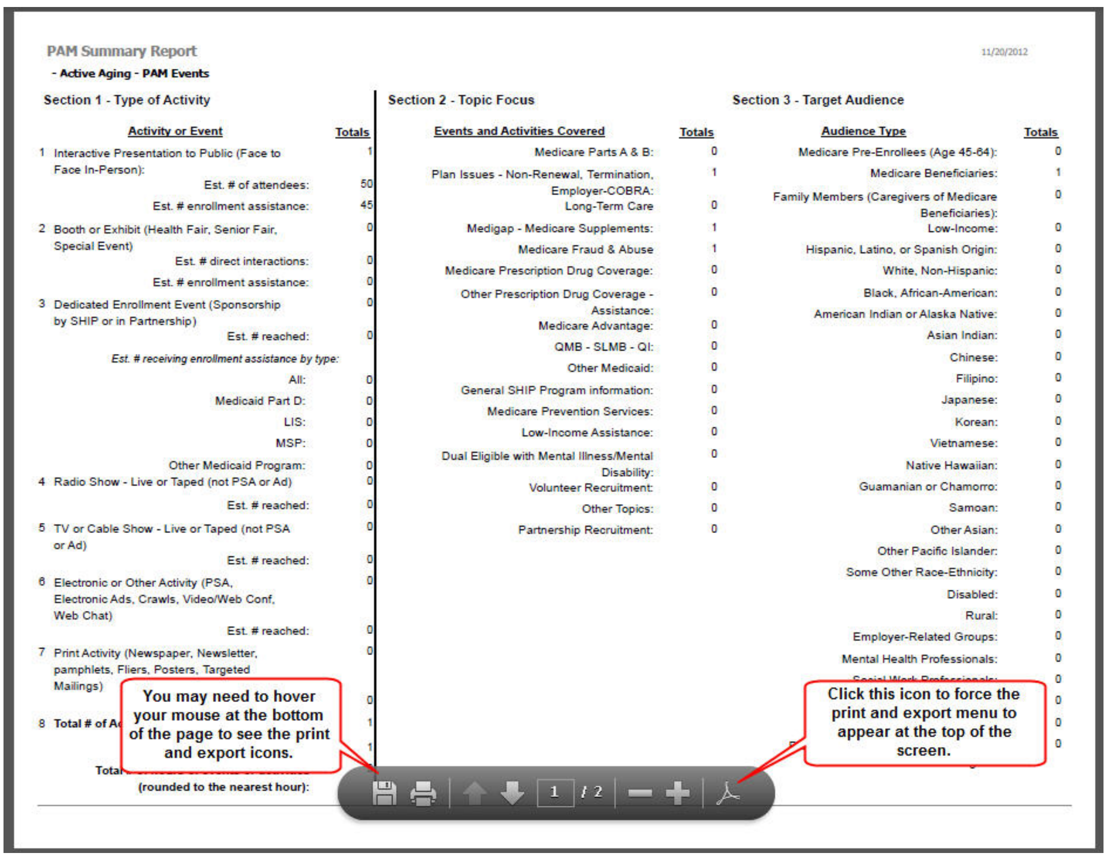
3. Double click on **PAM Summary Report** to create a new report definition.
   a. Alternatively, if a saved report definition already exist, double click the appropriate definition.

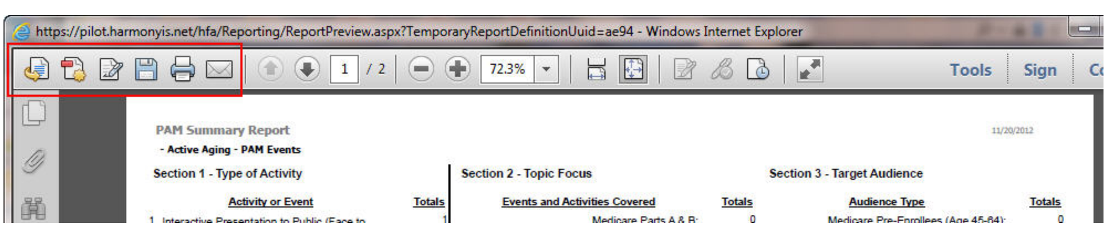


4. Enter a **Title**.
5. If desired, enter a subtitle, description, comments, and modify the security settings.
6. Select the appropriate Parameters.
7. Click **Preview**.



8. Save or print the report.
    a. Depending on the version of Adobe Acrobat™ you have installed on your computer, you may need to hover over the bottom of the window to see the print/export options.
    b. You can force a menu to appear at the top of the screen by clicking the Acrobat™ icon.





Note:	
	▪ It is critical that the SHIPtalk report and the Harmony report are both created with the same filters if the data is to be compared. ▪ Please see the Harmony for AgingUser's Guide for more information on creating and using report definitions.

SHIP Export Summary Report

The SHIP Export Summary report allows users to see both records that have been exported as well as those that have not been exported. This data is useful to agency staff as a means of ensuring that all recorded data has been submitted and as monitoring tool for both state and agency staff.

SHIP Export Report Characteristics

The following options are available for the **SHIP Export Summary Report**.

Report Characteristic	Notes
Title	Standard; behaves in the same way as all other reports
Subtitle	Standard; behaves in the same way as all other reports
Description	Standard; behaves in the same way as all other reports
Shared with	Standard; behaves in the same way as all other reports
Modifications allowed	Standard; behaves in the same way as all other reports
Comments	Standard; behaves in the same way as all other reports

SHIP Export Report Filters

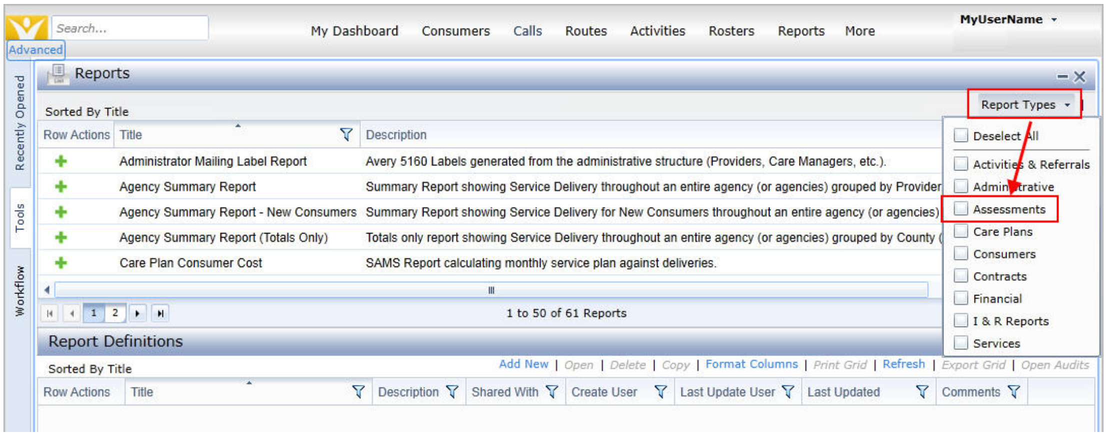
The following settings and filters are available for the **SHIP Export Summary Report**.

Available values	Notes
Report Settings	
Print Parameters	
Assessment Type	This filter will not affect the data in the report and will be removed in a future release. Please do not use this filter.
Report Settings	
Session Date (on or after)	Uses the assessment date, NOT the contact or activity date
Session Date (on or before)	Uses the assessment date, NOT the contact or activity date
Assessment Agency	

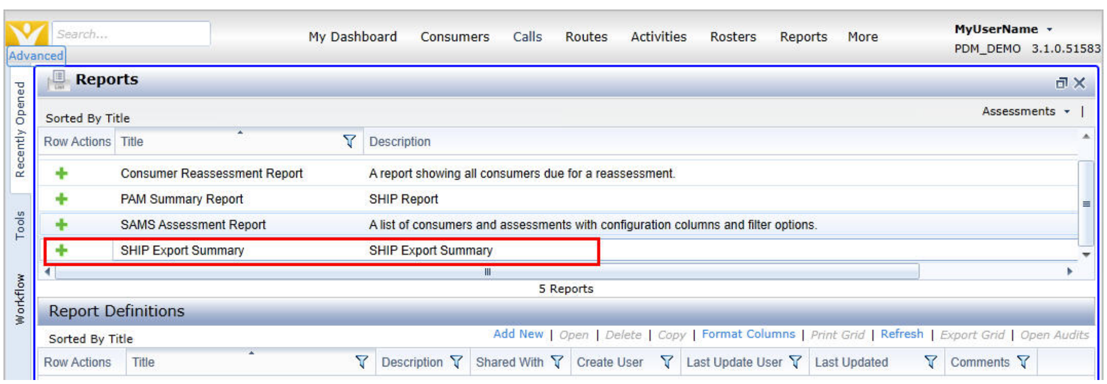
Running the SHIP Export Summary Report

To run the SHIP Export Summary Report

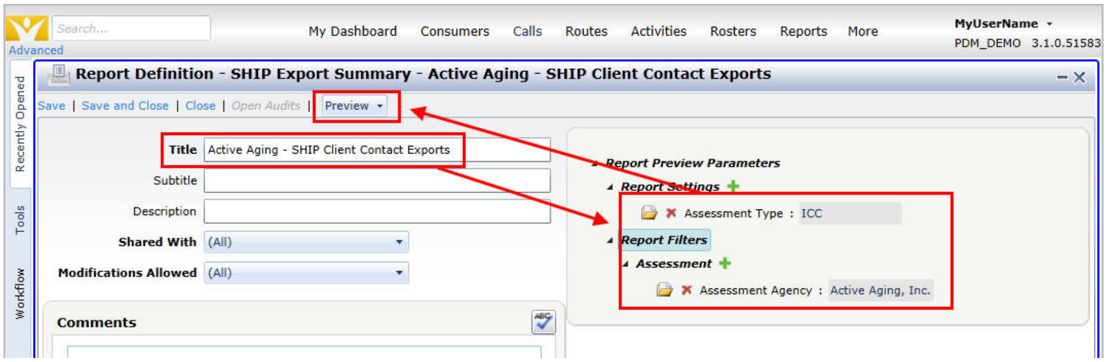
1. Navigate to the reports chapter.
2. Select **Assessments** from the **Report Types** menu.



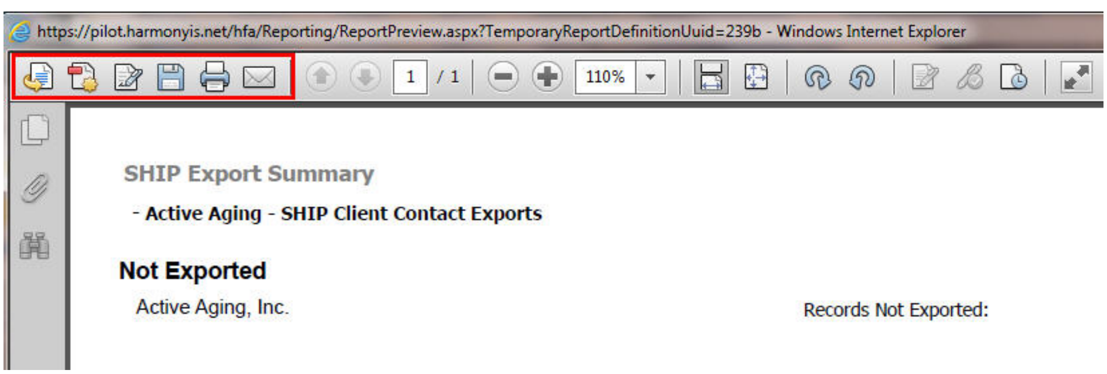
3. Double click on **SHIP Export Summary Report** to create a new report definition.
   a. Alternatively, if a saved report definition already exists, double click the appropriate definition.



4. Enter a **Title**.
5. If desired, enter a subtitle, description, comments, and modify the security settings.
6. Select the appropriate Parameters. In the example below, we've limited the report to a specific Agency and date range. Please see "SHIP Export Report Filters" on page 36 for a full list of available parameters.



7. Click **Preview**.
8. Save or print the report.
   a. Depending on the version of Adobe Acrobat™ you have installed on your computer, you may need to hover over the bottom of the window to see the print/export options.
   b. You can force a menu to appear at the top of the screen by clicking the Acrobat™ icon.



Notes:

- It is critical that the SHIPtalk report and the Harmony report are both created with the same filters if the data is to be compared.
- Please see the Harmony for AgingUser's Guide for more information on creating and using report definitions.

Data Reporting

Client Contact and PAM data must be submitted to CMS on a quarterly basis. Federal reporting dates are 1/31, 4/30, 7/31, and 10/31, but state SHIP directors may ask agencies and other organizations that provide SHIP counseling to submit earlier so that state SHIP staff has the opportunity to review the data. Reporting data to CMS can be done using one of two methods.

1. Print the saved assessment(s) and manually report the data using the SHIPtalk web portal.
2. Export the saved assessment(s) and upload the file using the SHIPtalk web portal.

Individual reporting via manual entry is preferable when only a few records need to be added or when corrections or deletions of previously entered data need to be made.

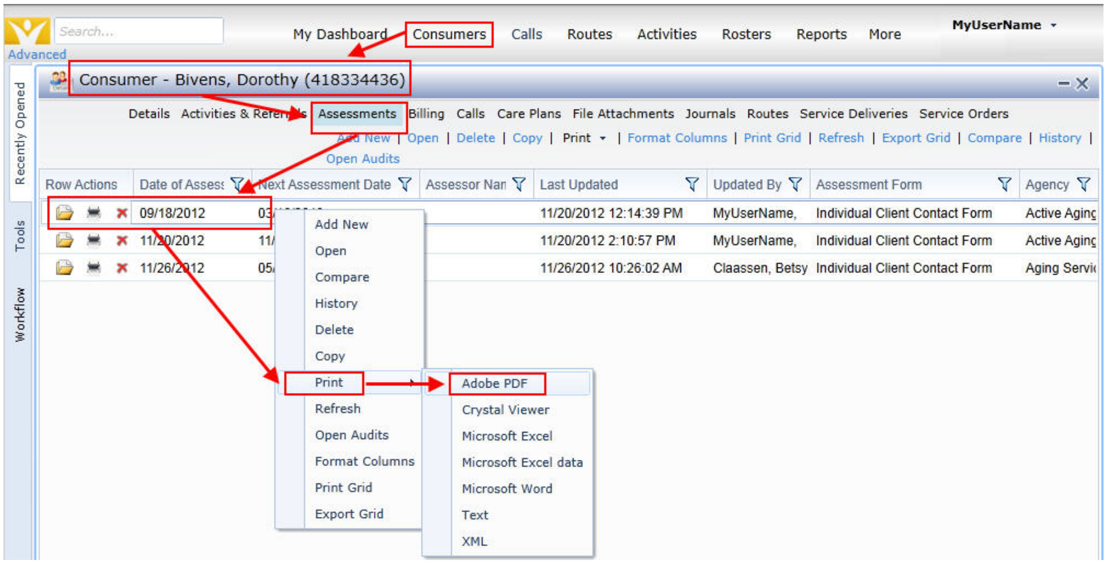
Batch reporting via export and upload is preferable when a large number of records needs to be reported.

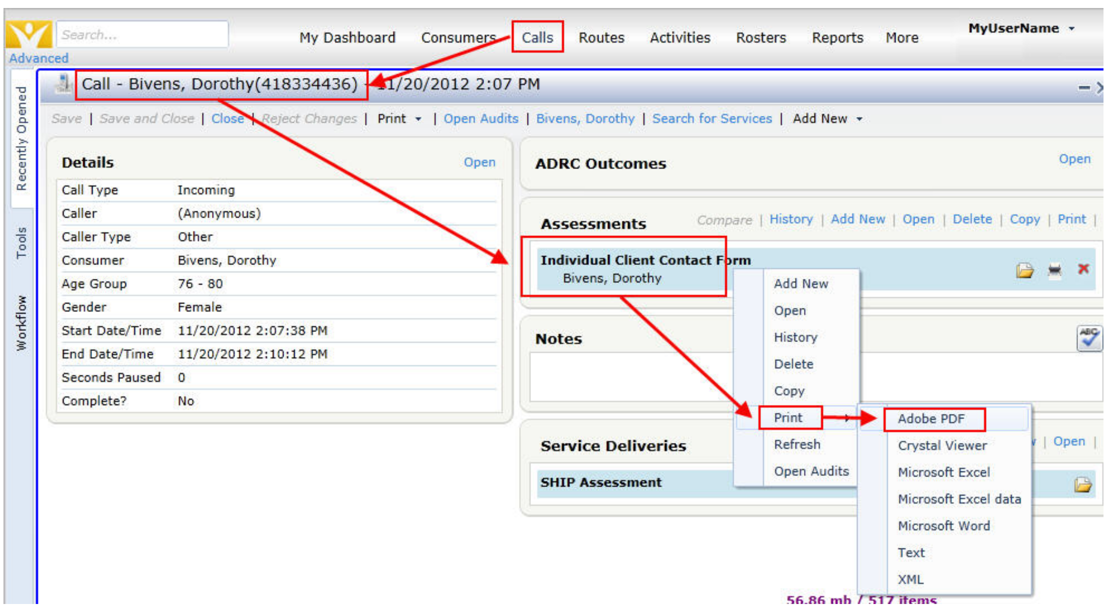
Individual Reporting

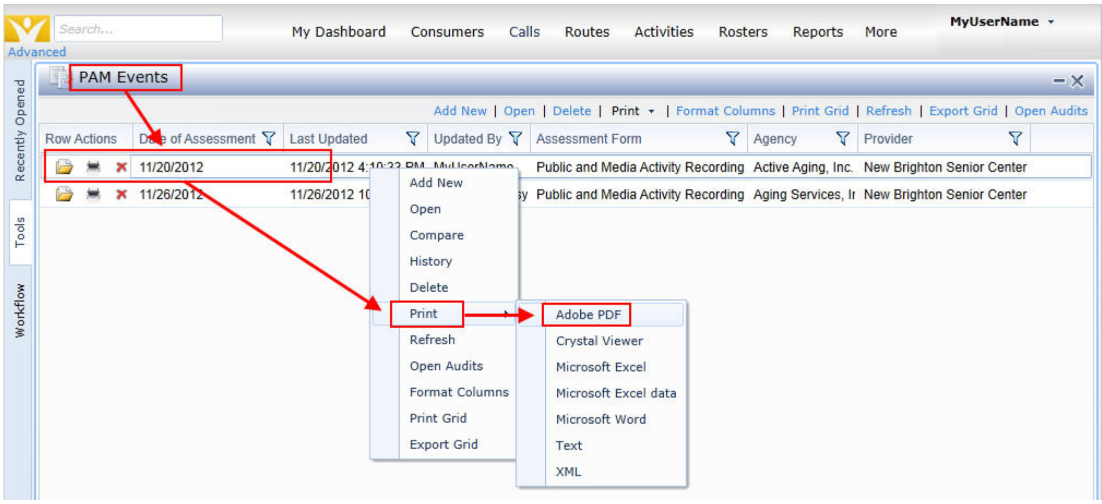
When only a few activities or contacts need to be reported to CMS, the most efficient method may be to print the assessment(s) and key data directly into the the SHIPtalk web portal.

To report individual contacts

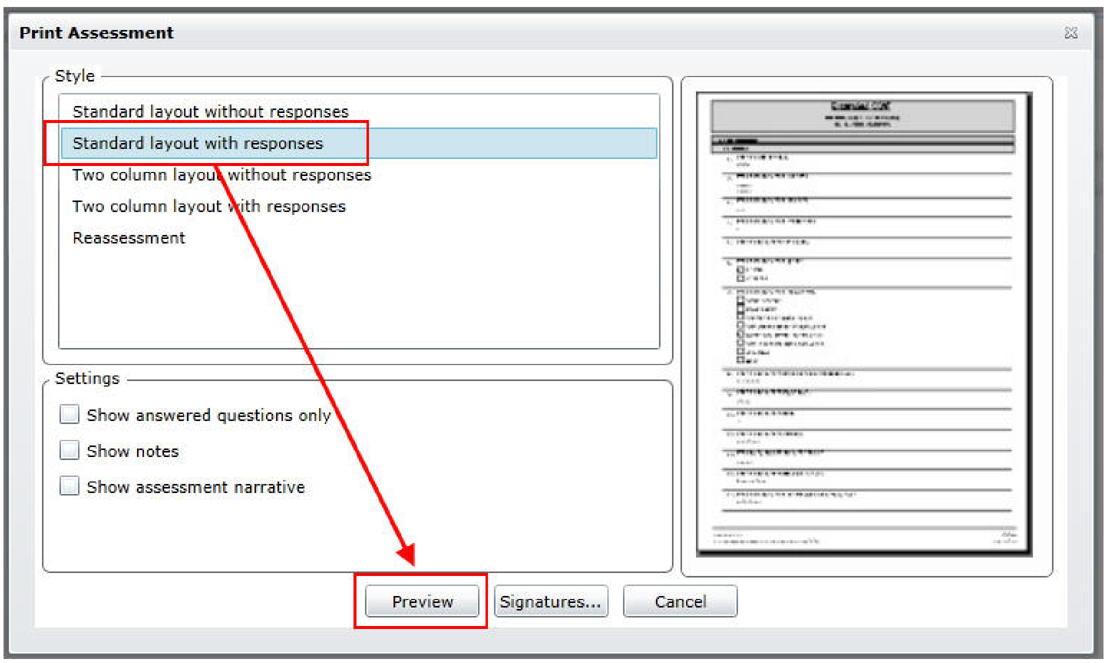
1. Navigate to the appropriate assessment in the consumer's record (Client Contact), the call record (Client Contact) or the PAM Activity area (PAM).
2. Print the assessment.
   a. Highlight the assessment
   b. Right-click.
   c. Select **Print** and then select the appropriate format (Adobe© PDF is recommended)

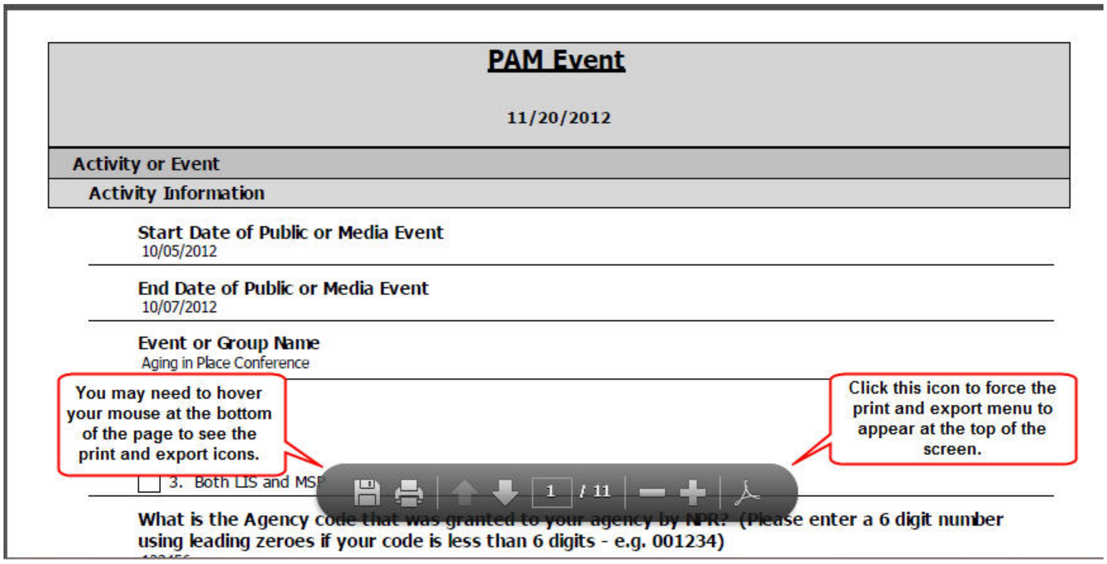

My Dashboard
Consumers
Calls
Routes
Activities
Rosters
Reports
More
MyUserName
Advanced
Consumer - Bivens, Dorothy (418334436)
Details
Assessments
Billing
Care Plans
File Attachments
Journals
Service Deliveries
Service Orders
Open Audits
Row Actions
Next Assessment Date
Last Updated
Updated By
Assessment Form
Agency
09/18/2012
11/20/2012 12:14:39 PM
11/20/2012 2:10:57 PM
11/26/2012 10:26:02 AM
Individual Client Contact Form
Add New
Open
Compare
History
Delete
Copy
Print
Refresh
Format Columns
Print Grid
Export Grid
Adobe PDF
Crystal Viewer
Microsoft Excel
Microsoft Excel data
Microsoft Word
Text
XML

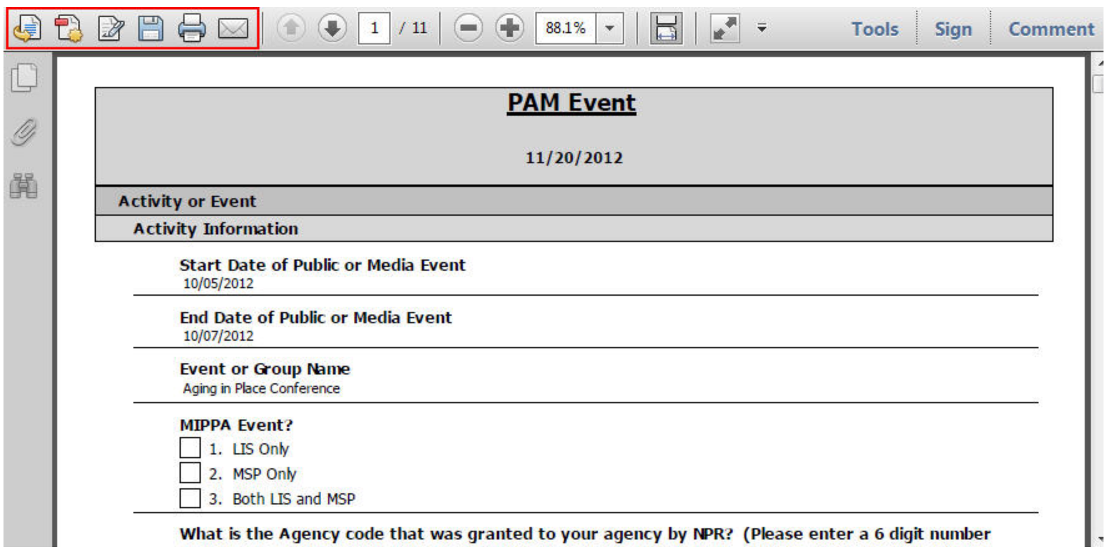

My Dashboard
Consumers
Calls
Routes
Activities
Rosters
Reports
More
MyUserName
Call - Bivens, Dorothy(418334436) 11/20/2012 2:07 PM
Details
Call Type Incoming
Caller (Anonymous)
Caller Type Other
Consumer Bivens, Dorothy
Age Group 76 - 80
Gender Female
Start Date/Time 11/20/2012 2:07:38 PM
End Date/Time 11/20/2012 2:10:12 PM
Seconds Paused 0
Complete? No
ADRC Outcomes
Assessments
Individual Client Contact Form
Bivens, Dorothy
Notes
Service Deliveries
SHIP Assessment
Add New
Open
History
Delete
Copy
Print
Refresh
Open Audits
Adobe PDF
Crystal Viewer
Microsoft Excel
Microsoft Excel data
Microsoft Word
Text
XML



d. The Print Assessment dialog box will be displayed. Select the appropriate options and click **Preview**.







3. Use the printed copy to transfer the data to CMS.
   a. Login to SHIPtalk.
   b. Enter the data through the web portal.

Note:	As with all assessments, the Client Contact and PAM assessments can be configured, during printing, to include signature lines. Please refer to the Harmony for Aging User's Manual, which is available online under the Help menu option, for information on adding and removing signatures.

Batch Reporting

When large numbers of records or contacts need to be reported to CMS (for example, the quarterly reports for an agency), batch reporting is the preferred method. An export is generated which automatically validates that all required data is present and in the correct format to be processed by CMS. Any errors that are detected can be easily corrected prior to completing the export. Once complete, the file is uploaded through the SHIPtalk web portal.

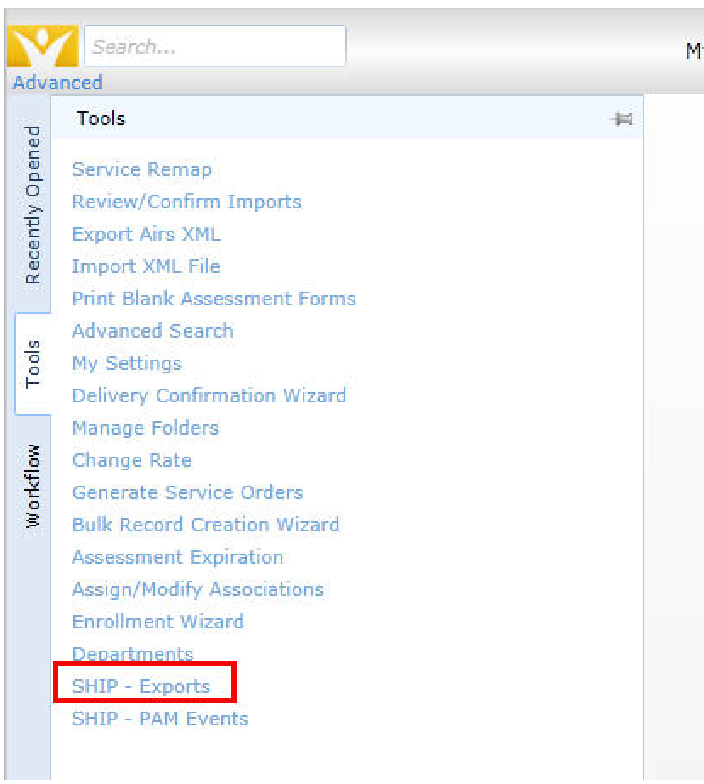
Creating an Export

Selecting Assessments for Export

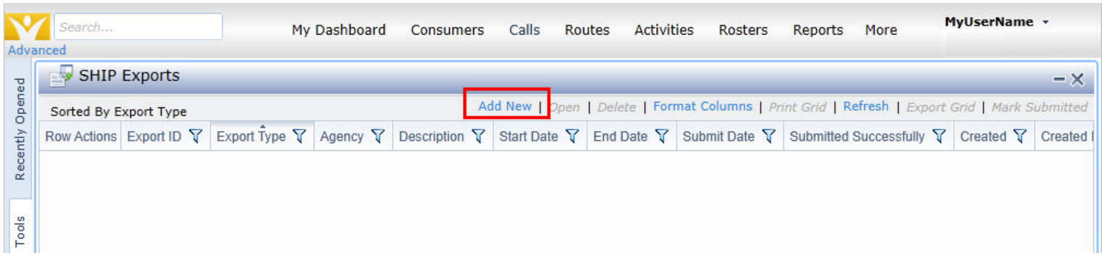
The first step in creating an export file for submission to CMS is identifying the appropriate assessments.

To select assessments to be included in an export

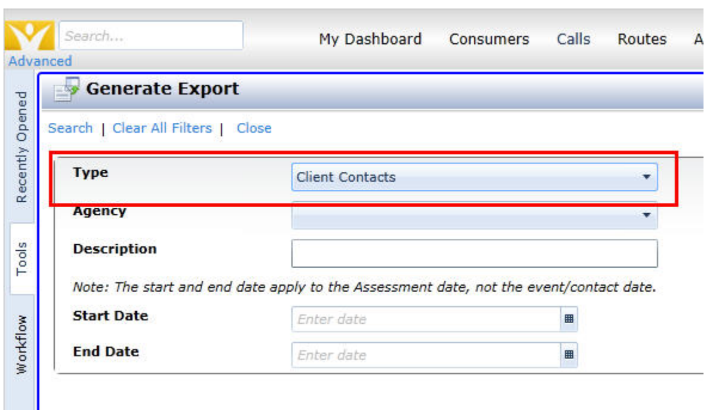
1. Click on the **Tools** menu located on the left side of the screen.
2. Select **SHIP - Exports**.



3. Click **Add New**.

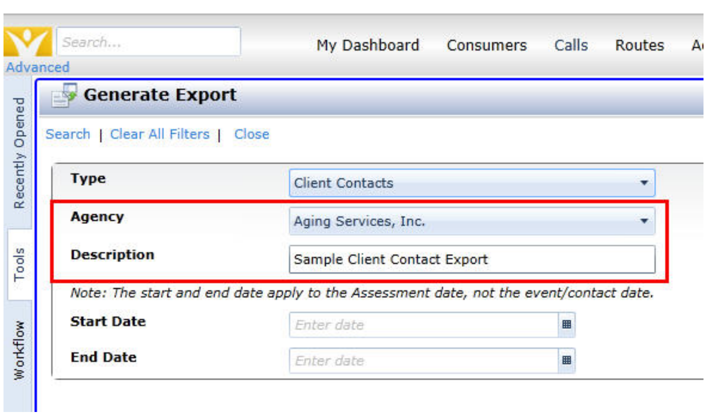


4. The **Generate Export** screen will be presented. It has 3 menu options and filters used to identify the records to be included in the export. The available menu options are:
   a. ***Search*** - Finds all records that meet the specified criteria and which have not been previously included in an export.
   b. ***Clear All Filters*** - Deletes all specified criteria.
   c. ***Close*** - Closes the Generate Export Screen without creating an export file.
5. Select the **Type** of export you wish to create.

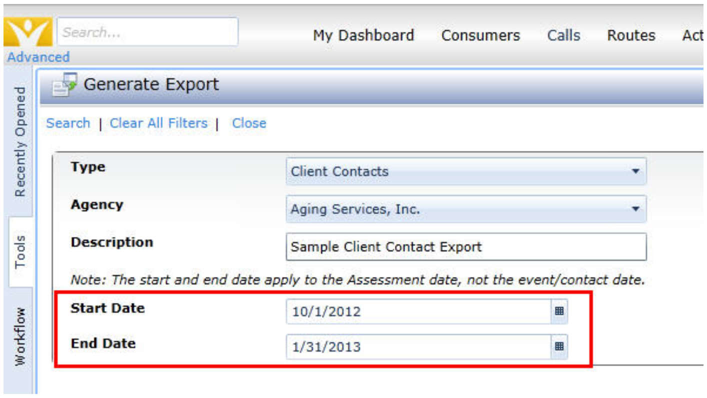


Note:	It is not possible to create and export that contains both Client Contact and PAM data.

6. Select an **Agency** and enter a **Description**.

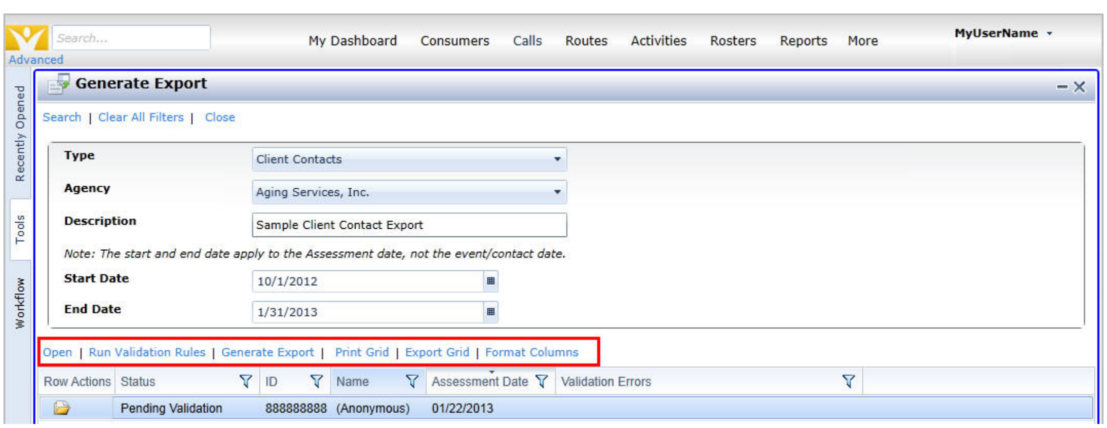


7. Enter the date range of assessments to be included in the export.



Note:	The date used in selecting records is the Assessment Date (found on the Edit Assessment screen), NOT the contact or activity date (inside the assessment).

8. Click **Search**.
9. A new list view or grid of records matching the specified criteria will appear at the bottom of the screen. The available menu options are:
   a. ***Open*** - Opens the highlighted assessment. Assessments can also be opened by clicking on the folder icon in the Row Actions column.
   b. ***Run Validation Rules*** - Applies business rules that ensure that each record meets CMS requirements.
   c. ***Generate Export*** - Creates an export file containing all records that have passed the validation rules.
   d. ***Print Grid*** - Prints the list view or grid of records.
   e. ***Export Grid*** - Exports the list view or grid of records to a comma-delimited (.csv) file.
   f. ***Format Columns*** - Allows a user to customize the columns that appear and the order they appear in.

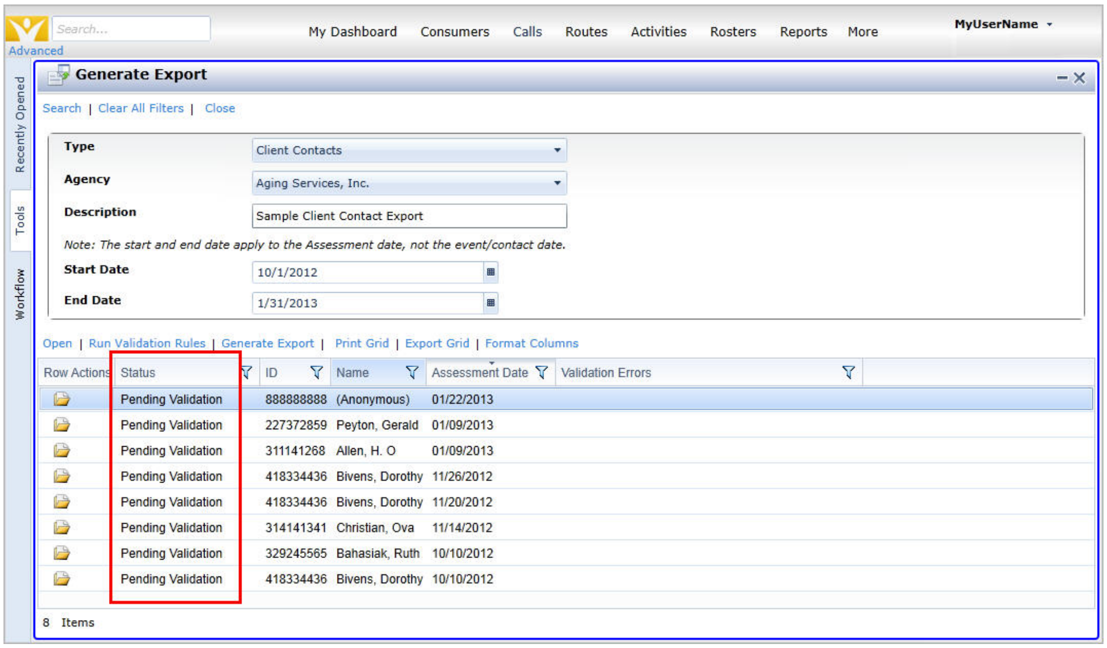


Checking Assessments for Errors

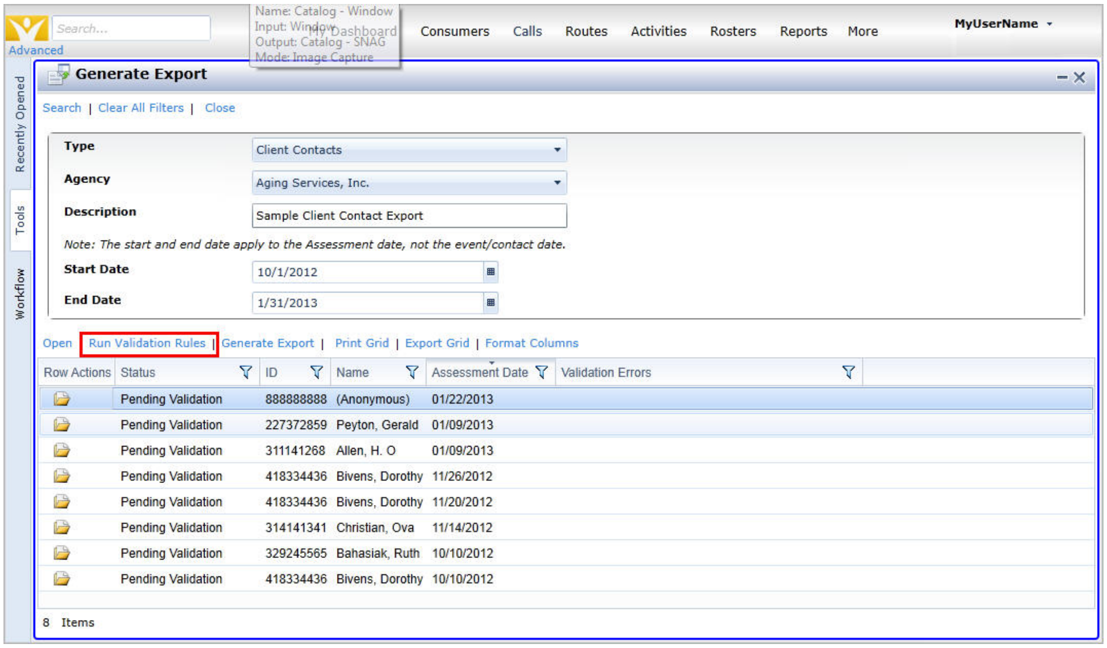
Before assessments are included in an export file, business or validation rules need to be applied to ensure that they meet all CMS requirements.

To validate assessments

1. Start an export using the steps found in "Selecting Assessments for Export" on page 43.
2. The initial status of each record is "Pending Validation". This indicates that the records have not yet been checked to make sure that they meet all CMS requirements.



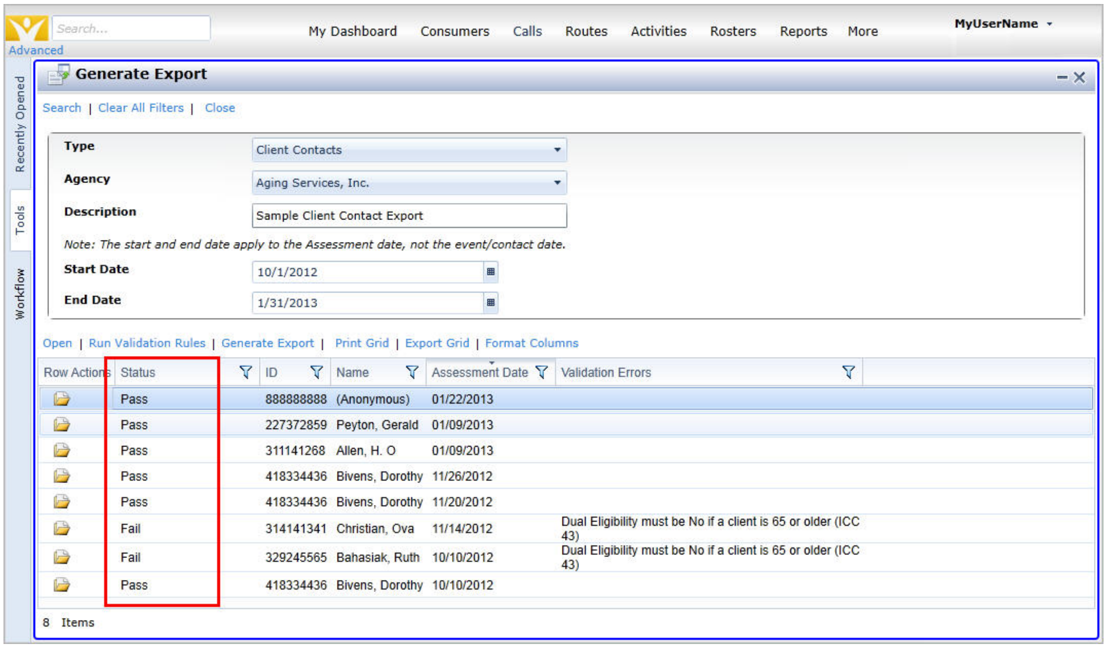
3. Click **Run Validation Rules**.



a. A message will appear if any errors were found.

b. Click **OK**.

1. You will be returned to the grid. The status of each record will have been updated.
   a. "Pass" indicates that a record has met all CMS requirements and is ready to be included in an export file.
   b. "Fail" indicates that a record has not met all CMS requirements and cannot be included in an export file until those errors have been corrected.



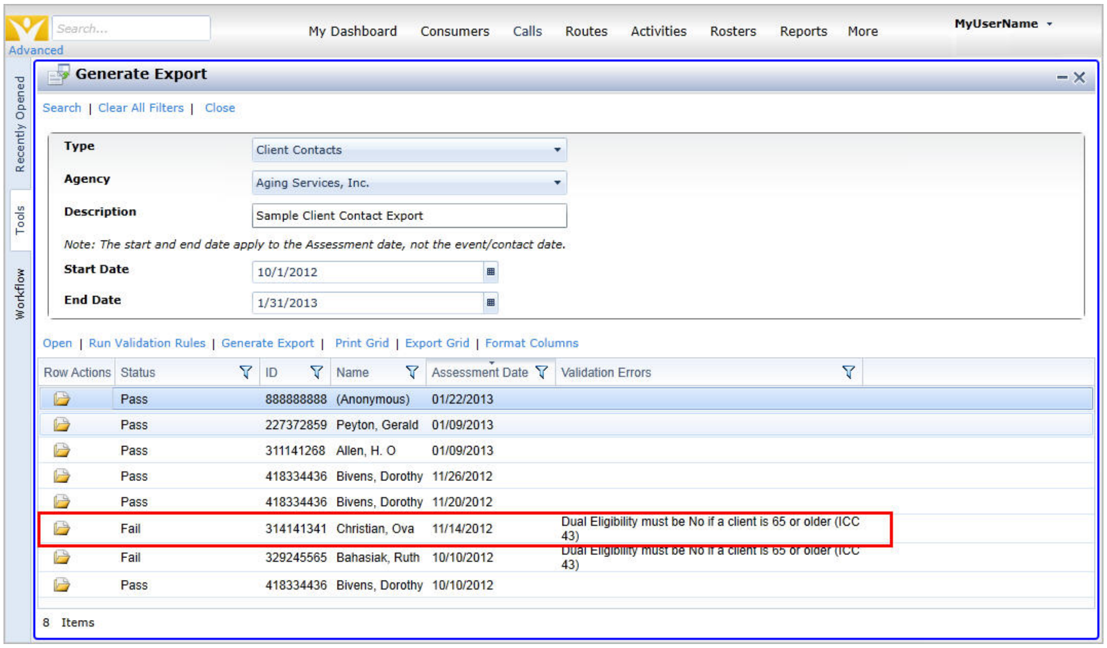
Correcting Assessment Errors

SHIP assessments are designed to ensure that all required data is entered and is in the correct format during data entry. However, as a "safety check" the validation rules are applied again when an export is being created. Assessments that do not meet CMS requirements can be quickly and easily corrected and revalidated.

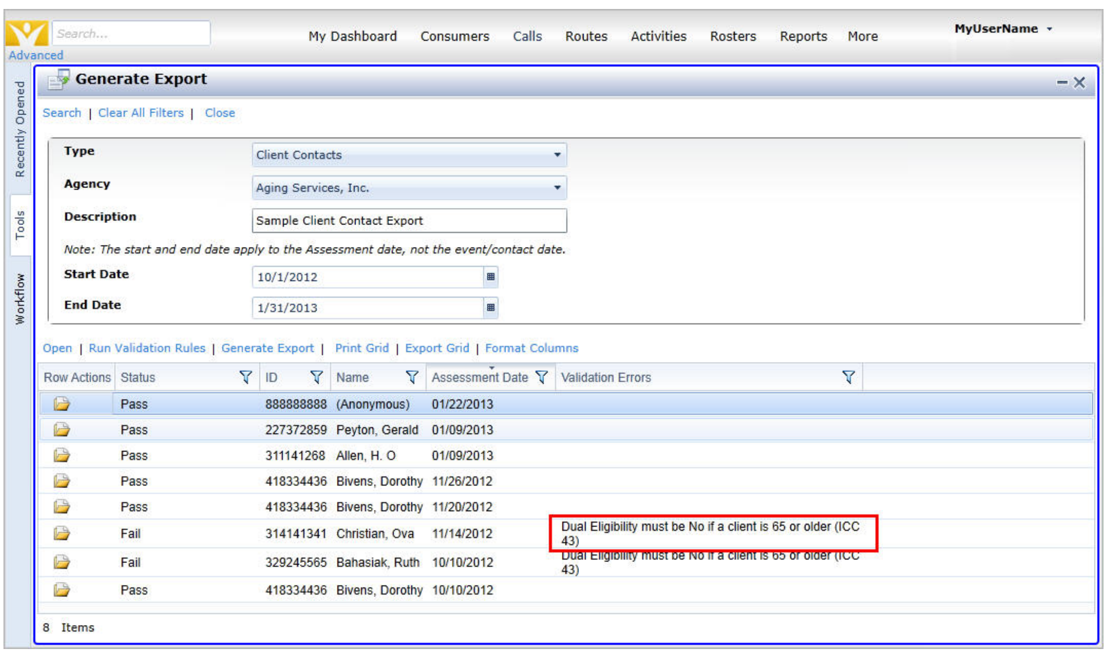
To correct and revalidate assessment errors

1. Start an export and validate the results as described in "Selecting Assessments for Export" on page 43 and "Checking Assessments for Errors" on page 46.
2. Records that have errors will have a status of "Fail". Locate the failed record(s).

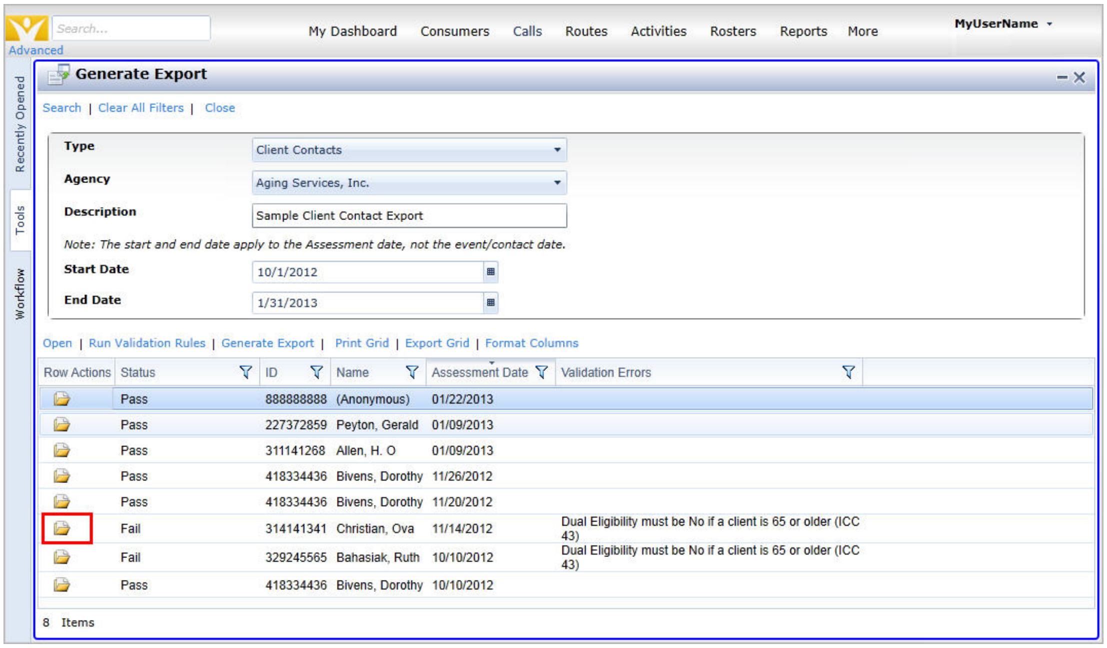
Note:	You can quickly group all failed records together by clicking on the Status column header.



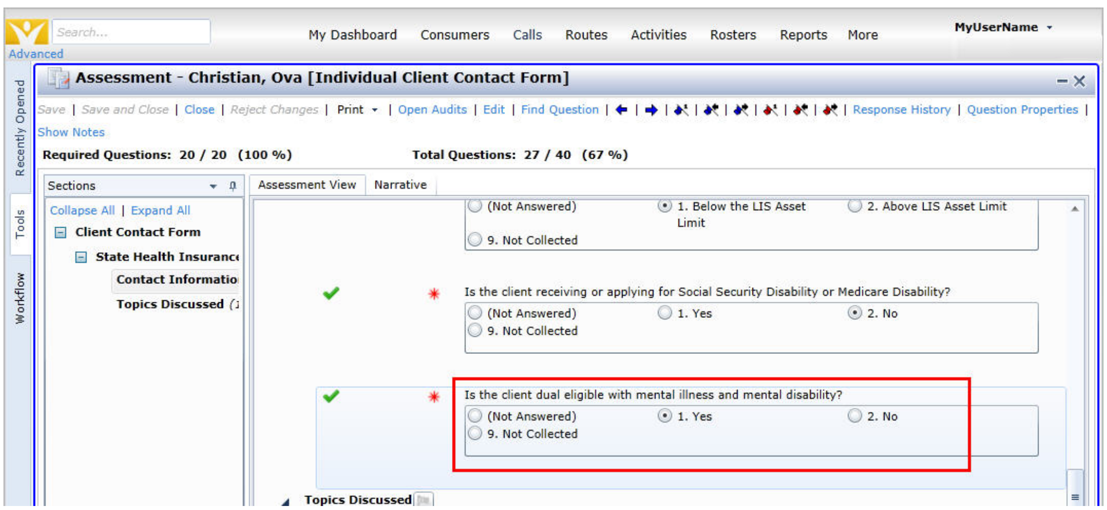
3. The problem(s) or error(s) with the assessment as listed in the **Validation Errors** column.
    a. Most errors are self-explanatory and can be easily corrected. However, there are a few errors that require more extensive assistance; these are clearly indicated and ask you to contact your system administrator.



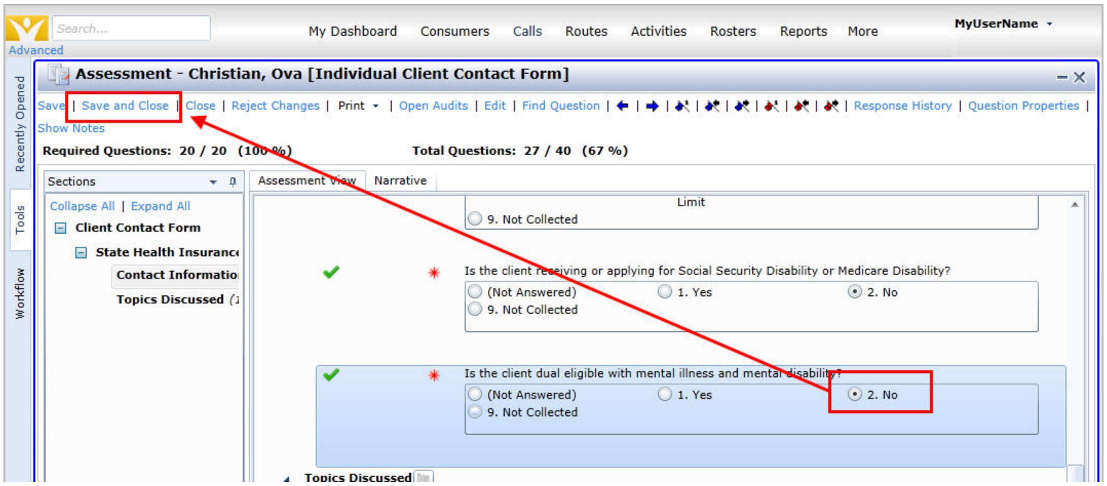
4. After reading the error description, open the problematic assessment by clicking on the folder icon in the **Row Actions** column.



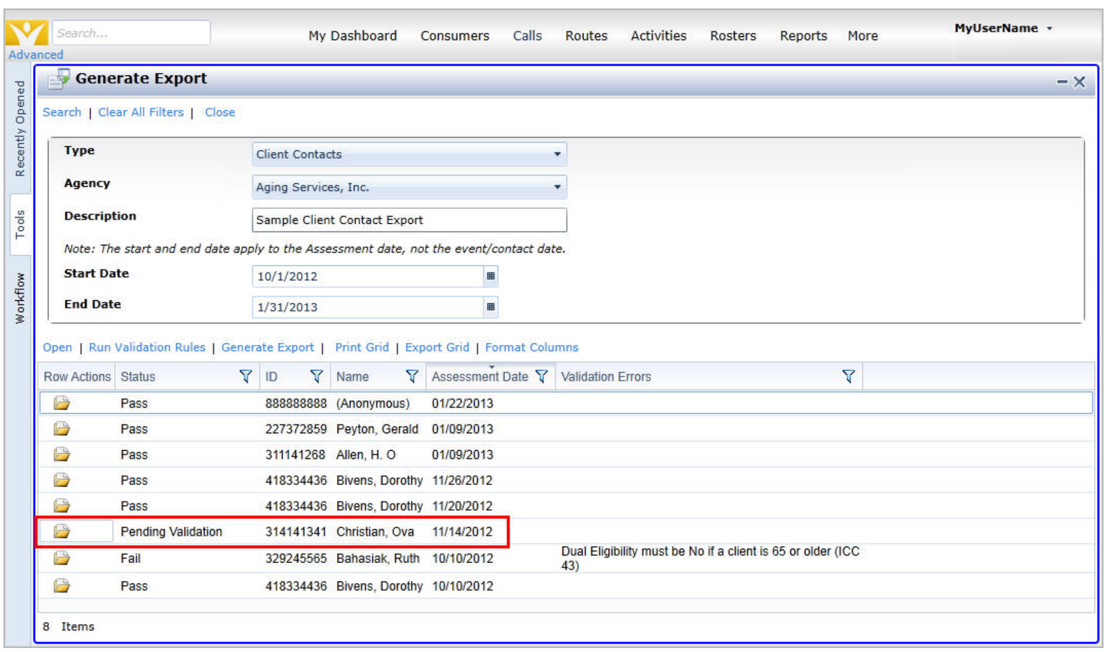
a. The assessment will automatically open.



5. Locate and correct the error.
6. Click **Save and Close**.



7. The assessment will close and you will be returned to the **Generate Export** screen.
    a. The status of the assessment will have automatically been changed to "Pending Validation".



8. Click **Run Validation Rules**.
    a. If all errors have been corrected, the record's status will change to "Pass".
    b. If any errors remain, the record's status will return to "Fail" and the errors will be described in the "Validation Errors" column.
9. Repeat the process for each failed assessment record.

Note:	You can correct and revalidate each assessment individually OR you can correct all assessments and then revalidate the entire export batch. Which method

you use has no affect on the final export; use whichever best fits your needs and business processes.

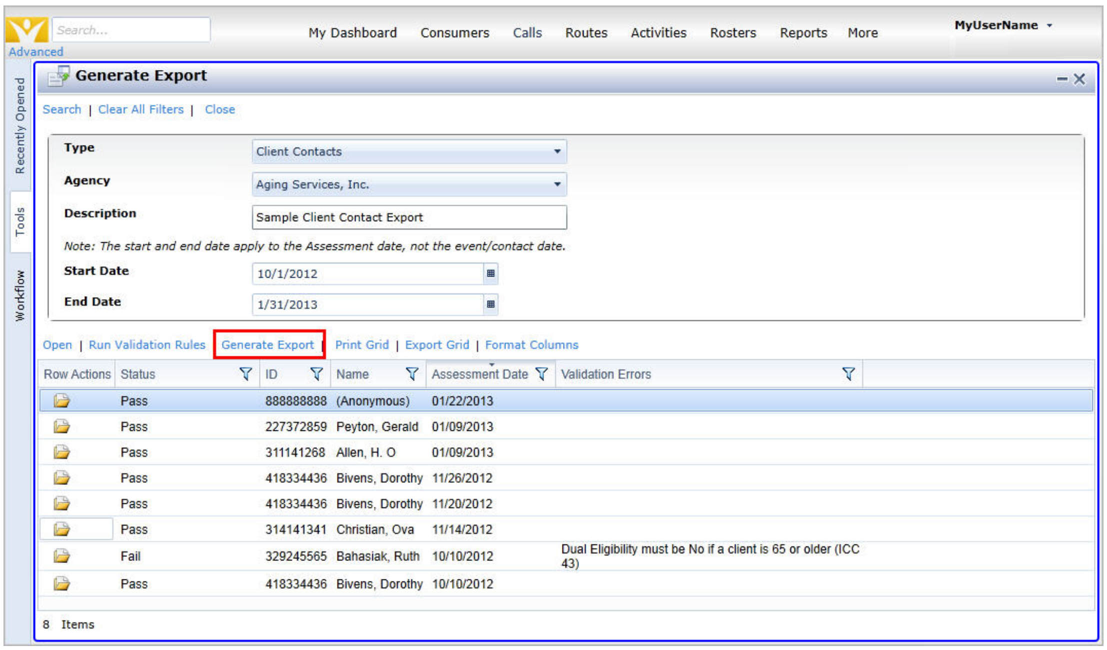
10. Once you have corrected the errors, you can create an export file (see "Generating an Export File" on page 52).

Generating an Export File

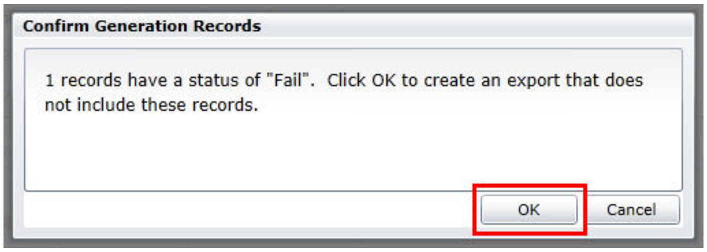
Records that have met all CMS requirements can be included in an export file.

To generate an export file

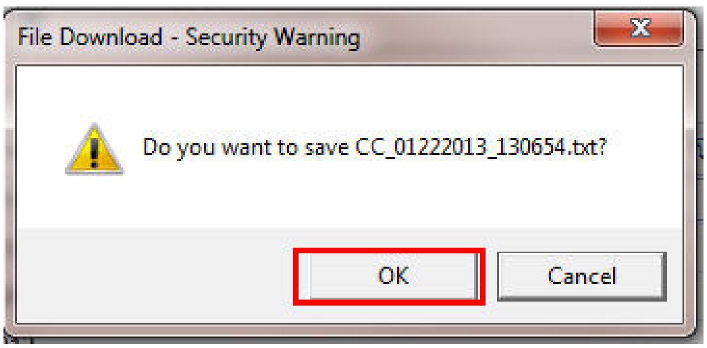
1. Start an export and validate the results as described in "Selecting Assessments for Export" on page 43 and "Checking Assessments for Errors" on page 46.
2. Click **Generate Export**.



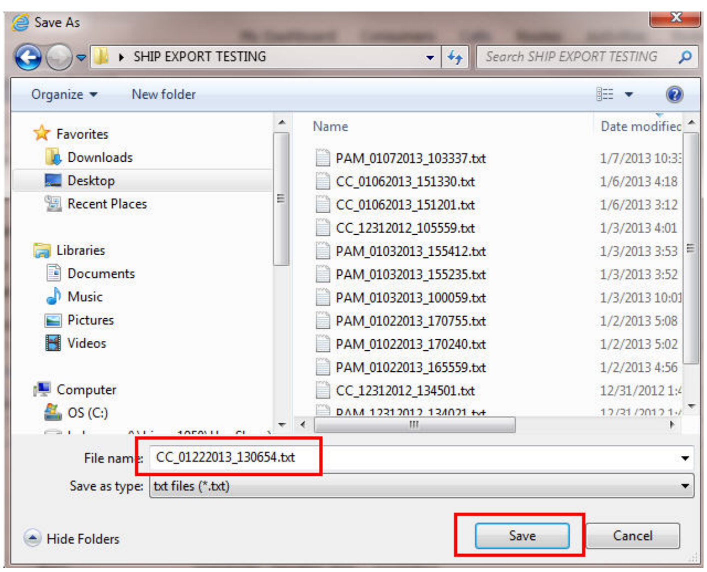
3. If any records have a status of "Failed", a message will appear.
   a. Click **OK** to create an export file that does not include the failed records. These records can be corrected and included in another export.
   b. Click **Cancel** to return to the results grid without creating an export file. See "Correcting Assessment Errors" on page 48 for information on how to correct assessment errors.



4. If all records have passed or if you have opted to create an export that excludes failed records, you will be prompted to save the export file. Click **OK**.

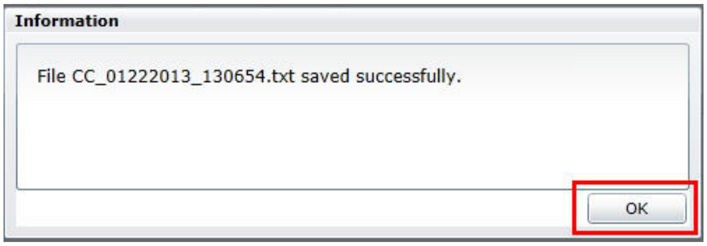


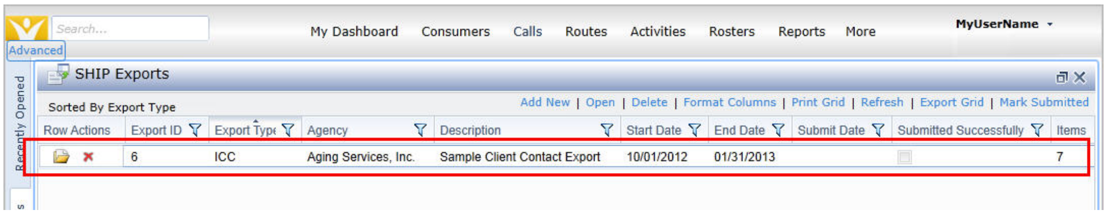
5. A standard dialog window for saving a file will open. Browse to the appropriate location and save the file.
6. Click **OK**.



IMPORTANT NOTE:	Do not change the file name. The CMS SHIPtalk site requires that the name of the file have a very specific format.

7. The export file will save and you will be returned to the main SHIP Exports Screen.





IMPORTANT NOTE:	■ Current export functionality only accommodates the reporting of new contacts and/or activities. Once a contact/activity is reported to CMS (either through the use of an earlier export or by keying in through the SHIPtalk web portal), any changes, corrections, or deletions must be done through the SHIPtalk web portal.

Submitting an Export to CMS / SHIPtalk

The final step in reporting to CMS is to upload the file(s) using the SHIPtalk web portal.

Note:	The following information describes the use of a non-Harmony product and is provided as an informational courtesy only. Harmony is not responsible for changes in procedure, process, or functionality on this website. All questions and support issues related to this website should be submitted to the appropriate person at each state/agency or directly to SHIPtalk; Harmony does not provide support for this website.

To submit an export to SHIPtalk

1. Login to SHIPtalk.

2. Select the "Upload" tab.

3.
4. Browse for the appropriate file.
5. Click "Validate".
    a. If the file passes validation, a new "Process" button will appear. Click this to complete the upload.
6.
    a. If the file does not pass validation, a list of errors will be displayed. These errors can be downloaded using the "Download invalid records" link.

Note:	If a file does not pass validation, none of the records in the file will be uploaded.

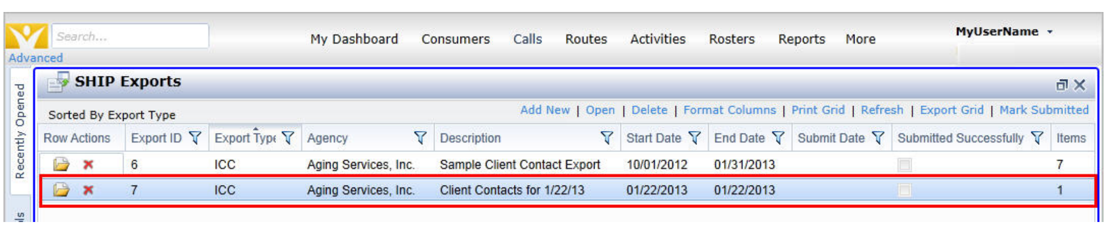
7. Logout of SHIPtalk

Completing an Export

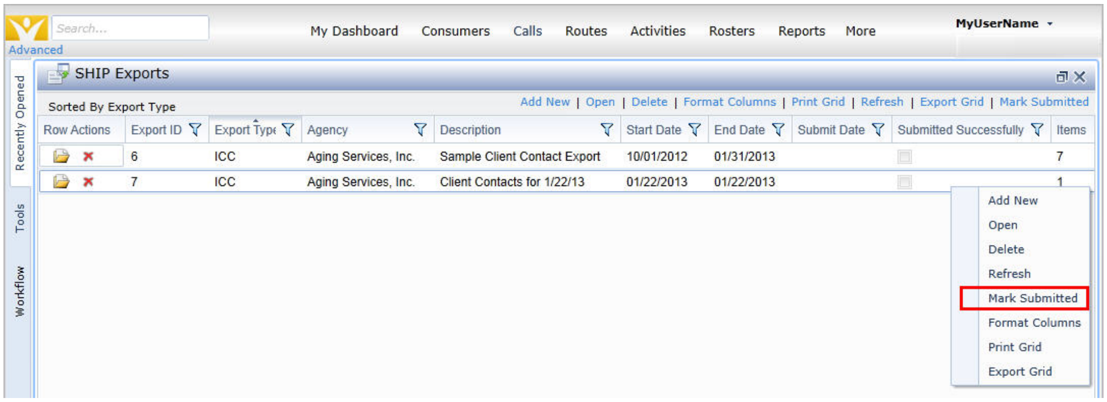
Once an export has been successfully uploaded to SHIPtalk, the user must update the status in Harmony for Aging and Adult Services so that those records are marked as having been successfully reported. Marking an exported as **Submitted Successfully** will permanently exclude the records from being included in other exports.

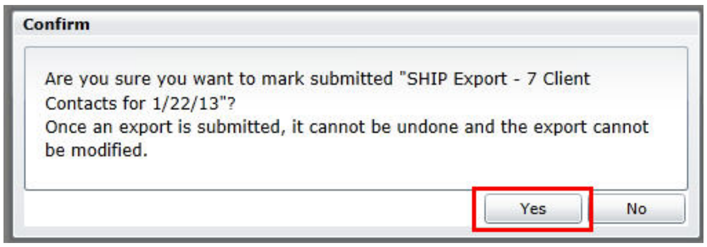
To complete an export

1. In Harmony for Aging and Adult Services, navigate to the SHIP Exports screen.
2. Highlight the appropriate export.

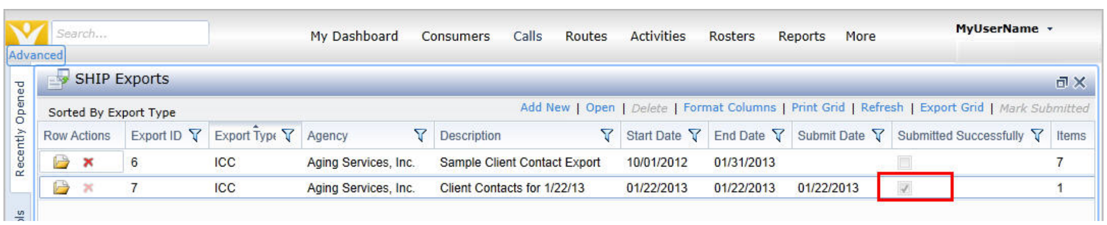


3. Mark the export as **Submitted Successfully** by right clicking and selecting **Mark Submitted** or by selecting **Mark Submitted** from the menu options.





4. You will be returned to the grid, the export will be marked as **Submitted Successfully**, and the **Submit Date** will be populated.



Reviewing, Editing, and Deleting Exports

When appropriate, you can review,edit, and/or delete the contents of an export file.

Reviewing Exports

Once an export has been created, you can review the contents at anytime. You can see the list of assessments that were included in the file, open the assessments directly from within the export, and save a fresh copy of the original export file.

Export Contents

To see a list of the assessment included in an export

1. Navigate to the SHIP Exports screen.
2. Highlight the appropriate export.

3. Open the export by clicking on the folder icon in the **Row Actions** column.
4. The export will open.
5. At the top of the screen, a read-only copy of the original export criteria will be displayed. There are also two menu items.
   a. ***Close*** - Closes the export screen.
   b. ***Save Export Locally*** - Allows the user to save a copy of the original export file (see "Saving a Copy of the Export" on page 58)
6. At the bottom of the screen will be a grid or list view that lists all of the assessments included in the export. There are also 4 menu items.
   a. ***Open*** - Opens the highlighted assessment. Assessments can also be opened by clicking on the folder icon in the **Row Actions** column.
   b. ***Print Grid*** - Prints the list view or grid of records.
   c. ***Export Grid*** - Exports the list view or grid of records to a comma-delimited (.csv) file.
   d. ***Format Columns*** - Allows a user to customize the columns that appear and the order they appear in.
7. Assessments can be opened by clicking on the folder icon in the **Row Actions** column.

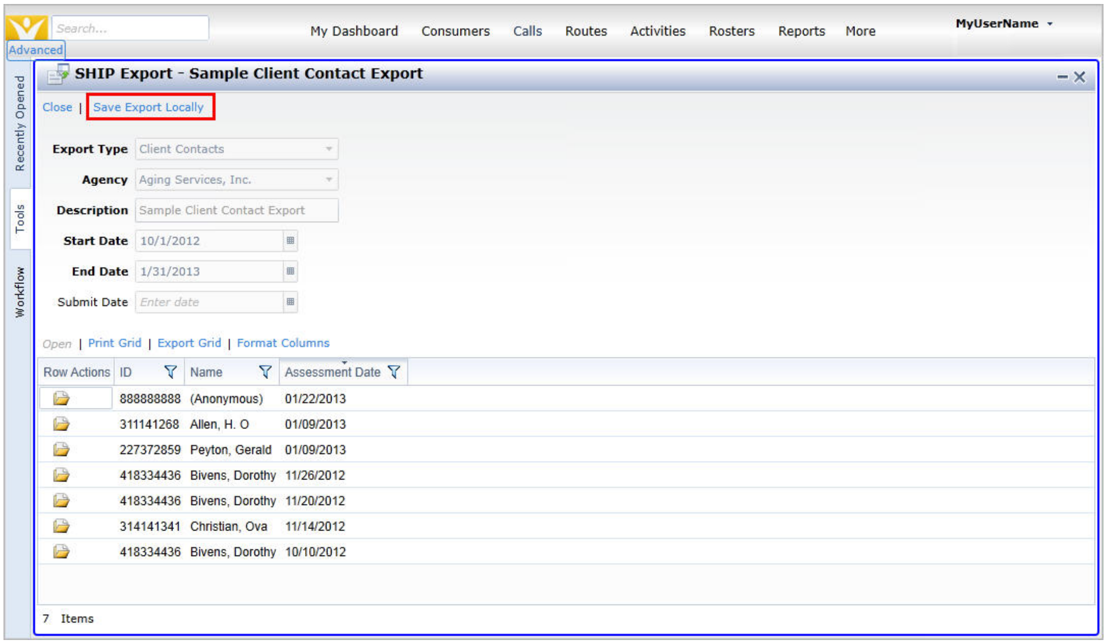
IMPORTANT NOTE:	Assessments opened from within an export batch are editable. However, changes made to assessments will NOT automatically be update the existing export file. To update the existing file, see "Editing Exports" on page 59

Saving a Copy of the Export

You can easily create a copy of the original export file. This is useful if you need to resubmit the file to SHIPtalk or when troubleshooting technical issues.

To save a copy of the original export file

1. Navigate to the SHIP Exports screen.
2. Highlight the appropriate export.
3. Open the export by clicking on the folder icon in the **Row Actions** column.
4. The export will open.
5. Click **Save Export Locally**.



6. You will be prompted to save the file.
7. Click **OK**.
8. A standard dialog window for saving a file will open. Browse to the appropriate location and save the file.
9. Click **OK**.

IMPORTANT NOTE:	Do not change the file name. The CMS SHIPtalk site requires that the name of the file have a very specific format.

10. You will be returned to the export screen.

Editing Exports

Occasionally you may create an export only to realized that the data in one or more of the assessments needs to be changed (e.g., you selected an incorrect topic or left out a presenter). As long as the export has not been marked as successfully submitted, you can make the appropriate changes and create an updated batch.

To edit an export

1. Delete the export that contains the assessments that need to be updated (see "Deleting Exports" on page 60).
2. Locate and edit the appropriate assessments.
3. Create a new assessment (see "Creating an Export" on page 43)

Note:	You may find it easier to link directly to the assessment from within the existing batch,

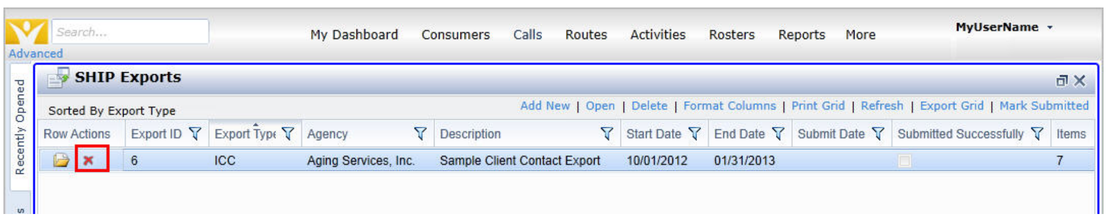
	make your edits/corrections, and then to delete the batch. It does not matter whether you delete and then edit or edit and then delete. However, no changes will be made to the actual export file until the batch is deleted and recreated.

IMPORTANT NOTE:	Once a file has been marked as successfully submitted, it cannot be deleted and, therefore, its contents cannot be edited as described above. In this scenario, edits will need to be made directly in SHIPtalk.

Deleting Exports

To delete an export

1. Navigate to the SHIP Exports screen.
2. Highlight the appropriate export.
3. Highlight the batch to be deleted.
4. Click on the red X icon in the **Row Actions** column.



5. The batch will be deleted and removed from the grid.

IMPORTANT NOTE:	▪ It is not possible to delete a batch that has been marked as successfully submitted to CMS. ▪ The ability to delete a batch is controlled by your security. If you don't see this option, contact your system administrator. ▪ Deleting a batch that has not yet been marked as successfully submitted to CMS will allow the assessments associated with the deleted batch to be available for inclusion in a subsequent batch.

SHIP Reporter Configuration

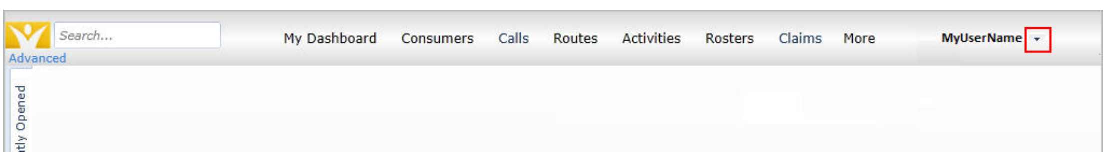
This section of the User's Guide contains information about configuration that is either specific to or affect SHIP Reporter. Some of this information may also be included in other guides.

Personalizing Your Default SHIP Reporter Settings

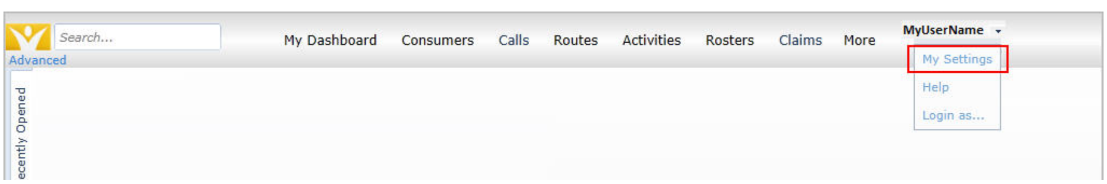
SHIP reporting requirements include some SHIP specific data, such as your SHIP Counselor ID, your zip code, and the SHIP Agency Code assigned to your agency by CMS. These values can be stored in Harmony and used to automatically populate the appropriate assessment questions so that you do not have to key in the data with every contact.

To personalize your SHIP Settings

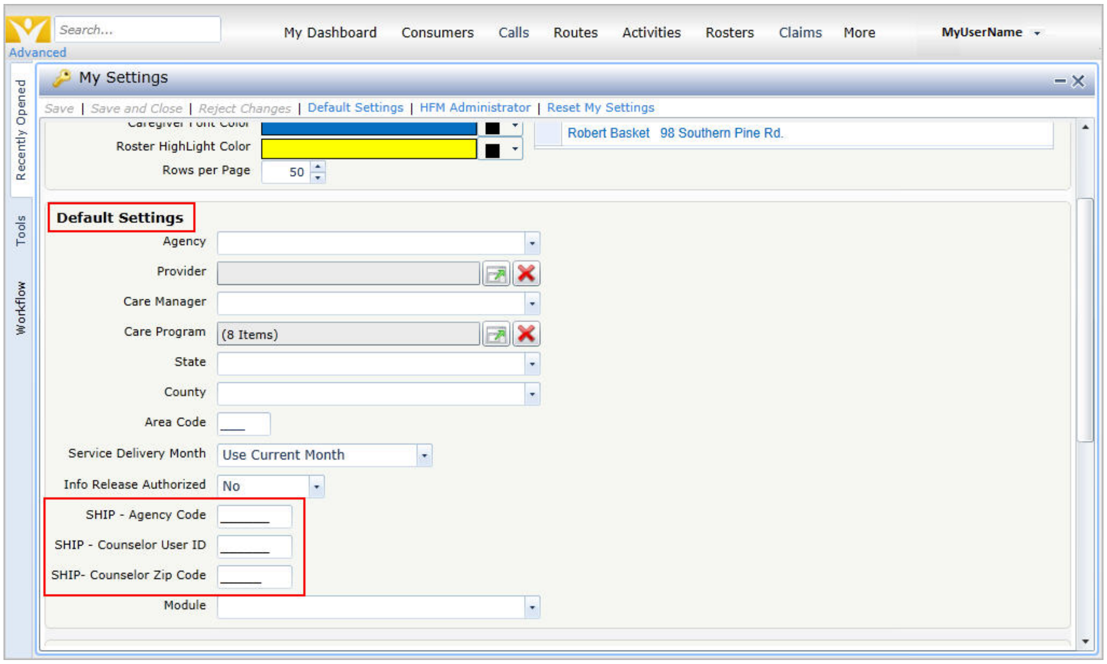
1. Click on the down arrow next to your user ID in the upper right corner of the screen.



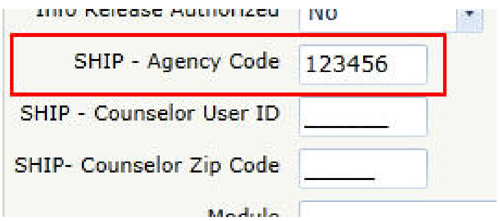
2. Select **My Settings** from the menu that is displayed.



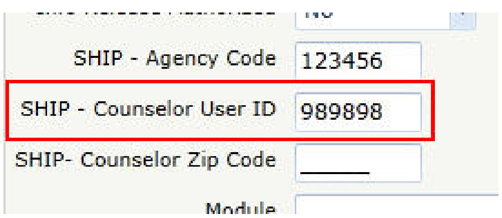
3. SHIP specific data is located at the bottom of the **Default Settings** section.



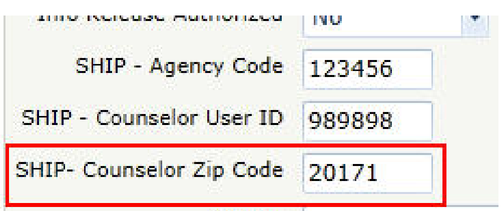
4. Enter the 6 digit **Agency Code** assigned to your agency by CMS. If the code is less than 6 digits, please use zeros at the front of the number (e.g., code 1234 would be entered as 001234).



5. Enter the **Counselor User ID** assigned to you by CMS. Unlike the agency code, this number does not need to be exactly 6 digits (e.g., counselor user ID 4567 would be entered as 4567).



6. Enter your **Counselor Zip Code**.



7. If desired, select a default agency and provider. Though not required by SHIP, setting default values can speed up data entry if these data are required by your organization.

8. Click **Save and Close** to save your personalizations.

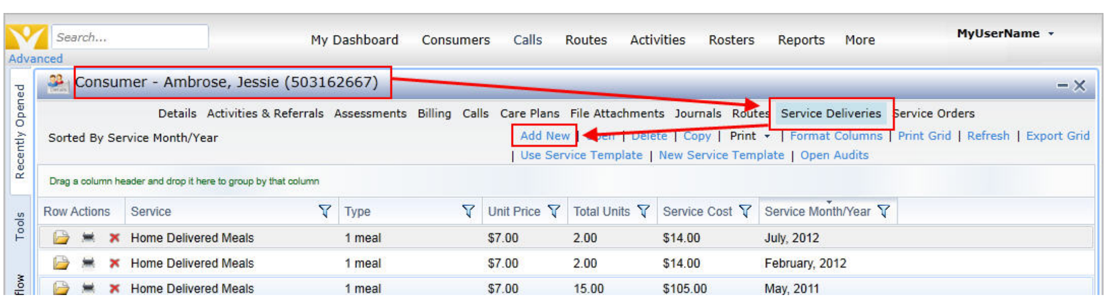
Creating a Service Template

Service templates are useful when you frequently record the same service delivery and the only things that change from consumer to consumer are the units and dates. Each template is essentially a service delivery record that is completely pre-populated except for the consumer (and the system fills that in when you create the service delivery), the date(s) of service, and the units; this means that you can create a service delivery record with a couple of clicks of the mouse instead of entering 6 or more pieces of data.

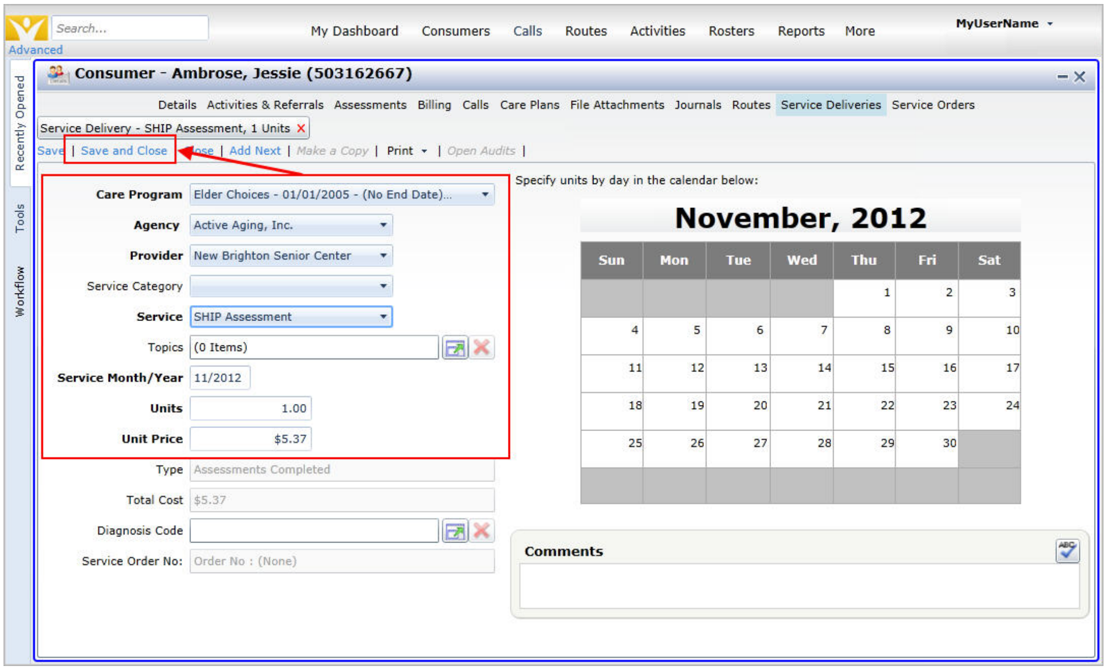
NOTE:	▪ If the appropriate service template(s) have already been set-up, you should skip this section.

To create a service template

1. This is a one time set-up task and may have already been performed by your system administrator.
2. If the appropriate service template has not been set-up, you can create one.
3. Open a consumer and navigate to the **Service Deliveries** section of their record.
   a. It doesn't matter which consumer you select - you will use their record just to create the template and will be deleting the service delivery once the template is complete.
4. Click **Add New**.



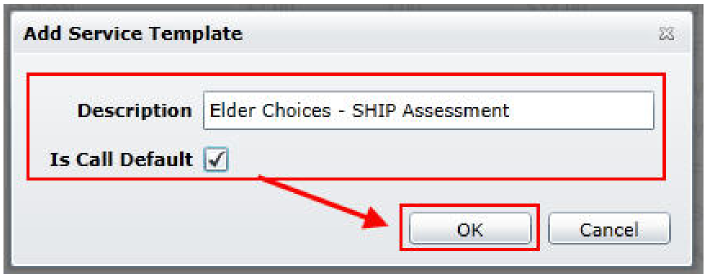
5. Record a service delivery that has all of the characteristics of the service delivery for which you wish to create a template .
    a. In the following example, we're creating a service delivery for that records the fact that a worker at New Brighton Senior Center, who provides services for Active Aging, Inc., under the Elder Choices care program, has completed a SHIP Assessment.



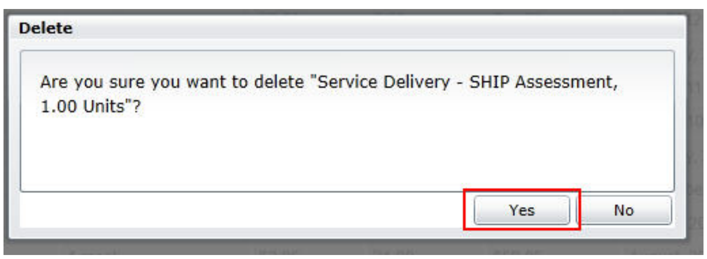
6. **Save and Close** the service delivery.
7. The screen will refresh to show the service delivery list view.
8. Highlight the service delivery you just created and then **select New Service Template** from the menu at the top of the screen.

9. A dialog box will be displayed.
    a. The application will suggest a description, but you can edit it if desired.
    b. If you want to be able to create service deliveries when assessments are created from

with a call record, check the **Is Call Default?** box.



10. **Delete** the service delivery you created.



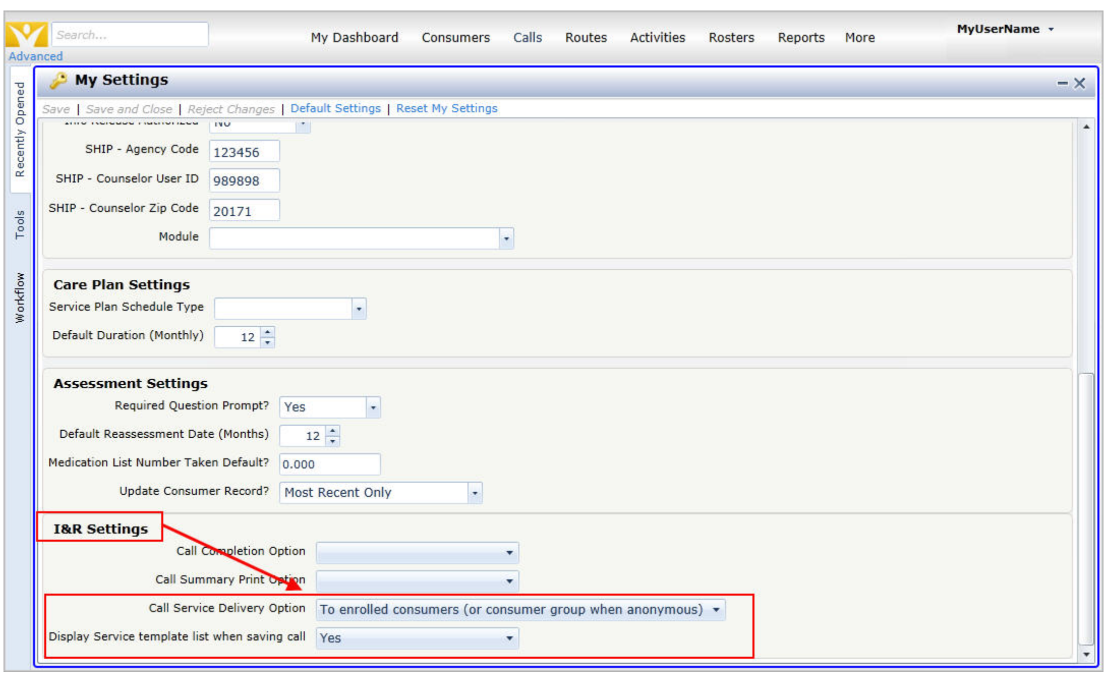
11. Confirm the service template has been created by attempting to use it (see "Recording a SHIP Service Delivery After a Call" on page 18 and/or "Recording a Service Delivery in a Consumer's Record" on page 20for more information).

Adjusting Call Service Delivery Options

To adjust your Call Service Delivery Options

1. Navigate to **My Settings**.

2. Scroll down to the **I & R Settings** section.
3. Set the **Call Service Delivery Option** to determine how services should be delivered when a call is saved. Options include:
   a. *Never*: This means that when a call is saved, the user will never be able to record a service delivery at the same time.
   b. *To enrolled consumers (or consumer group when anonymous):* This means than when a call is saved, the user will be able to record a service delivery for the consumer, if they are a registered consumer. If the consumer is anonymous, a service delivery can be recorded for a Consumer Group.
   c. *To Consumer Group Only:* This means that when a call is saved, all units of service will be delivered to the Consumer Group and not to the specific consumer.
4. Set the **Display Service Template List when saving call**. If set to Yes, then a user will be able to pick from a list of service templates when recording the resulting service delivery.



NOTE:	▪ If these sections are disabled and editing is not allowed, then your SAMS administrator has disabled them. Please contact your administrator for more information.