



Getting to know CLAIM's SHIPtools site for Volunteers

9.2020 v1



Introductions

If you are sitting with someone in a group, please send that you attended to claimcallcenter@primarisfoundation.org

The recording and pdf file with notes will be posted to www.missouricclaim.org on Friday, Sept. 18th, 2020

Why are we changing to SHIPtools?

Old data collection system is obsolete and no longer supported

New system gives us the option to combine other data collection systems into one

We have been looking for a way to move to a "Real Time" system for referrals for quicker call backs to clients

No longer rely on multiple email systems – more secure way to send referrals

We will implement this New SHIPtools systems in 2 steps:
Referral and Training information in September 2020
Contacts entry information added in Jan 2021

Welcome to SHIPtools

What you will learn:

- What is SHIPtools
- How to Log In
- Home Tab items
- How to retrieve your referrals
- How to complete your referrals
- Who can run reports
- Live Example
- Q&As

Welcome

Current News

No news items to display

Login

Username

Password

Login

Welcome to your new MO CLAIM SHIPtools site. SHIPtools is a web-based application designed to help SHIPs report and track Medicare beneficiaries served, outreach events conducted, volunteer training and activities undertaken and facilitate other program administration tasks. SHIPtools was developed specifically for SHIPs by Gradient Blue, a small software development company that has more than 15 years experience working within the SHIP network.

How to Access SHIPtools

- The website will be located at www.SHIPtools.org/mo
- You will be sent via email, your login and password information.
- Site will **NOT be active** until September 22nd, 2020.
- You will be testing September 22nd – September 25th.
- You will only use SHIPtools site for referrals on September 28th, 2020.
- All referrals will be sent in “Real Time”!
- If you find any issues, please contact your Regional Liaison

The site will only remain open for 1 hour of inactivity. You may need to log on periodically to get your referrals.

Home

CLAIM DCI Primaris/CLAIM STATE HEALTH INSURANCE ASSISTANCE PROGRAM

Cindy Carr [logout](#)

HOME REFERRALS CLIENTS EVENTS ACTIVITIES TRAININGS REPORTS TEAM MANAGEMENT

Welcome

Current News

[Collapse All](#) | [Expand All](#)

[Welcome to SHIPtools](#)

Welcome to your TEST site of SHIPtools! Please remember we just added Referral Tab and updated the Training Tab so please test them out. We will have more training on these 2 tabs next week.....see you then! Cindy

Upcoming Events

September 2020						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

9/14: 8/2020 Initial Training Webinar - Session 4 (training event)

SHIPtools uses tab based navigation for organizing the site. Not all team members will have the same number of tabs when logging in. Access to the different tabs and functionality within the tabs is determined by the team member's role. These roles were developed and assigned by CLAIM staff during SHIPtools site setup.

The logged in user's name always appears in the top right corner of every page in SHIPtools. If you click on the user's name, you will be allowed to change your user preferences for email addresses, physical address and phone numbers associated with their CLAIM information.

A calendar of events (outreach activities) and trainings is located on the Home tab. When outreach Events or

Trainings are created members can choose to add them to this calendar on the Home tab. Home is also where you will find relevant news items.

The Reports tab provides aggregate information on the services CLAIM has provided. Only Site Supervisors will be able to view or use the report tab for reporting purposes of all team members tied to their site.

In the event that SHIPtools is being used on a public computer, such as at the library, it is important to select logout when a team member is done accessing the application. The application will automatically log users out after 60 minutes, if no activity is detected.

Freeman Health System
STATE HEALTH INSURANCE ASSISTANCE PROGRAM

HOME REFERRALS CLIENTS EVENTS ACTIVITIES TRAININGS

Referrals

Search Filters (click to hide/show)

Referral Date From: 1/1/20 To: [] Add Filter []

Change Columns (click to hide/show)

FIND

Referral Date	Client Name	Handled By	Assigned Partner	Assigned Volunteer	Call Time	Referral Status
9/10/2020	Dudley Wright	Cindy Carr	Freeman Health System	Jamie Gillmore		Open Add CCF
9/10/2020	Jennifer Brown	Cindy Carr	Freeman Health System	Russ Alcorn		Open Add CCF
9/10/2020	Jim Black	Cindy Carr	Freeman Health System	Russ Alcorn		Open Add CCF
9/10/2020	susie jones	Russ Alcorn	Freeman Health System	Russ Alcorn		Open Add CCF

1-4 of 4 | First | Previous | Next | Last
Export options: [CSV](#) | [Excel](#)

When you log on, you will see your Organization in the heading.

When a Team member logs on, they will go to HOME tab. If you click on the REFERRALS tab, you will see the referrals assigned to you and other members of your organization. To see the information, phone number and notes on the referral, click on the edit pencil. You will notice the “Add CCF” button to the far right of the client referral. We are eventually going to be able to use this function in January 2021 so that you can add the client contact information in SHIPtools and we can upload it into STARS so one system will add all our entries into STARS. We will have more information on this feature in December 2020 before it goes live.

Freeman Health System
STATE HEALTH INSURANCE ASSISTANCE PROGRAM

HOME REFERRALS CLIENTS EVENTS ACTIVITIES TRAININGS

Edit Referral

Client Name: Jennifer Brown

Zip Code / Partner: Freeman Health System

Volunteer: Russ Alcorn

Referral Date: 9/30/2020

Print

3

1

Referral Date: 9/30/2020

Contact Information

Client Name: Jennifer Brown

Address: 123 Help Ave

City, State, Zip: Hartsburg, MO, 65039

County: Boone

Home Phone: (573) 673-5278

Mobile Phone:

Best Time to call:

Email:

Representative Name:

Mobile Phone:

Other Phone:

Client Details

Date of birth:

CR:

Age Range:

Gender:



2

Age Range:

Gender:

How did client learn about CLAIM:

Type of client:

Referral

Referral Status:

Resolution:

Notes: Can she save money on drugs?

Save

After clicking on the edit pencil, you will see the details of the referral. Section 1 show details for the client. Section 2 shows where the notes or question the client has. After you have contacted the client in the referral, please mark the referral as “Client Contacted”. This will let SHIP staff, other volunteers at your site, and the Call Center know if you contacted the client. You will then put the contact into STARS. If you could not reach the person after 3 calls, please mark the referral as “Closed” and “Client did not return emails or phone calls”. This will let SHIP staff and the Call Center know you could not reach the client and we will send a “No Contact” letter to the client. Section 3 is where a volunteer or Site Coordinator can re-assign the client to another volunteer within the same organization, if needed. Perhaps someone called in sick and the client needs contacted, so they can be re-assigned to another volunteer to handle the contact.

Reporting

The screenshot displays the SHIPtools Reporting interface. At the top, there is a navigation bar with tabs for HOME, CLIENTS, EVENTS, ACTIVITIES, TRAININGS, REPORTS, TEAM, and MANAGEMENT. The 'REPORTS' tab is active, and the 'Clients' sub-tab is selected. Below the navigation bar, there are three main sections: Client Reports, Event Reports, and Team Member Reports. The 'Clients' section is the primary focus, featuring a search filter for 'Counselor' set to 'Miniea, Scott' and a 'Show incomplete CCFs' checkbox. A 'Change Columns' panel is open, showing a list of fields with checkboxes for selection. A table with columns 'Client Name', 'Contact Date', 'Counselor', and 'Approved' is visible. A dropdown menu is open on the right, listing various client-related fields. At the bottom right, a status bar indicates '142 items found. Displaying page 1 of 5.' and provides navigation links: 'First | Previous | Next | Last | Show All' and export options: 'Export options: CSV | Excel'.

SHIPtools contains two ways to analyze the information collected. The first is through a series of aggregate reports located on the Reports tab that only site coordinators can use. The second is through tab specific filters and columns that correspond to the fields of information collected in the functionality on that tab.

Any reports run using the tab specific filters and columns can be exported into a CSV or Excel format for additional analysis.

Live Site Examples

Q & A

You have

Questions

We have

Answers

Thank you for your help during
this transition!

For questions/comments: ccarr@primarisfoundation.org

Or contact your Regional Liaison