



h a r m o n y<sup>®</sup>  
INFORMATION SYSTEMS/INC.

---

User's Guide

# Harmony for Aging SHIP Data Collection and Reporting

1.0

September 2010

Harmony Information Systems, Inc.  
12120 Sunset Hills Road, Suite 500  
Reston, VA 20190  
703.674.5100  
FAX 703.674.5151  
[www.harmonyis.com](http://www.harmonyis.com)

# Contents

---

<b>Contents</b>	<b>2</b>
<b>Overview</b>	<b>4</b>
<b>General Workflow</b>	<b>5</b>
ICC Data .....	5
PAM Data .....	6
<b>Data Collection</b>	<b>7</b>
ICC Data .....	7
PAM Data .....	10
Administrative Review .....	12
ICC Summary Data .....	12
PAM Summary Data .....	13
Required Configuration .....	14
<b>Data Reporting</b>	<b>15</b>
Individual Reporting .....	15
Batch Reporting .....	16
Generating a Batch .....	16
Saving a Batch .....	18
Submitting a Batch to CMS / SHIPtalk .....	19
Completing a Batch .....	20
Viewing and Correcting Errors .....	21
Editing or Deleting a Batch .....	22
Editing a Batch .....	22
Deleting a Batch .....	23
Re-exporting a Successfully Submitted Batch .....	24
<b>Automated Service Delivery Creation</b>	<b>26</b>
Required Configuration .....	27

---

<b>Validation</b>	<b>29</b>
Table Definitions and Layout .....	29
ICC Data Validation.....	30
PAM Data Validation.....	35

# 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 (\$31.7 million in FY05) from Centers for Medicare and Medicaid Services (CMS). The grant awards require regular reporting from each state to CMS. Reporting is done through data collection forms: Individual Client Contact (ICC), Public and Media (PAM), and Resource Report Forms.

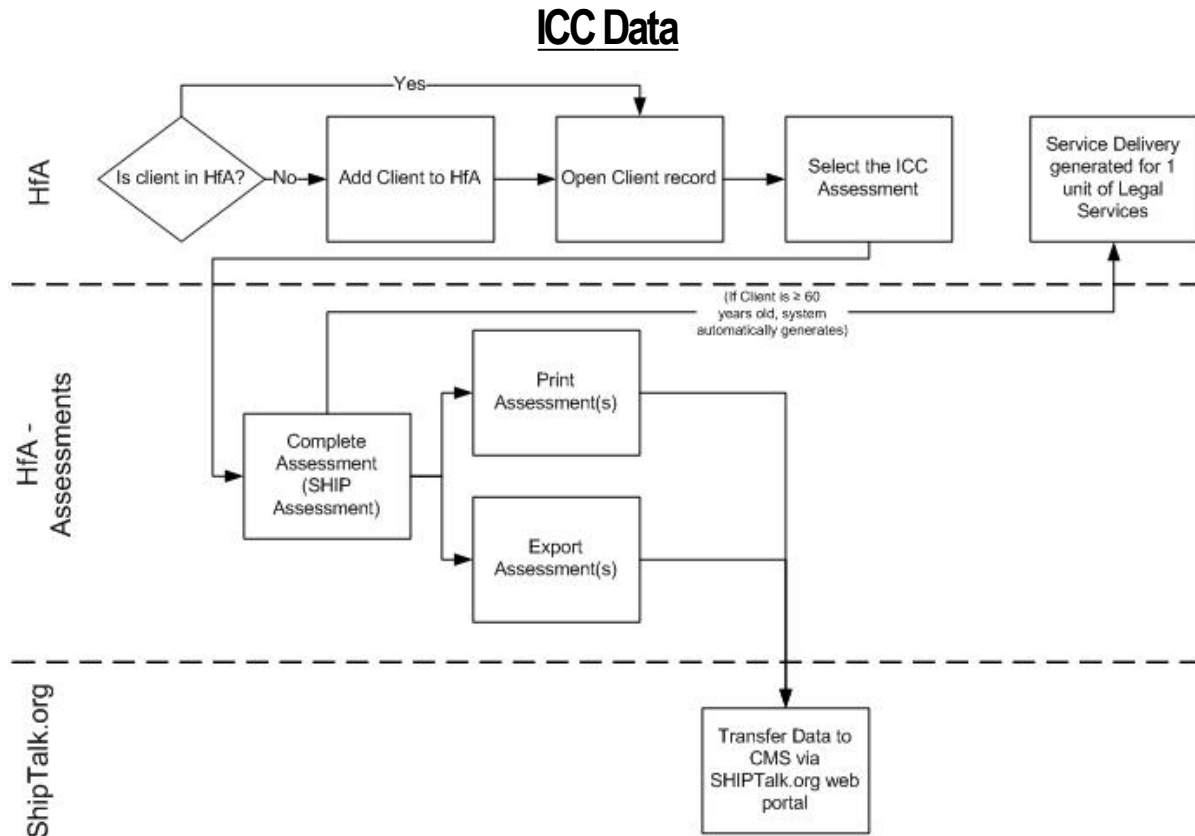
Harmony for Aging allows users to:

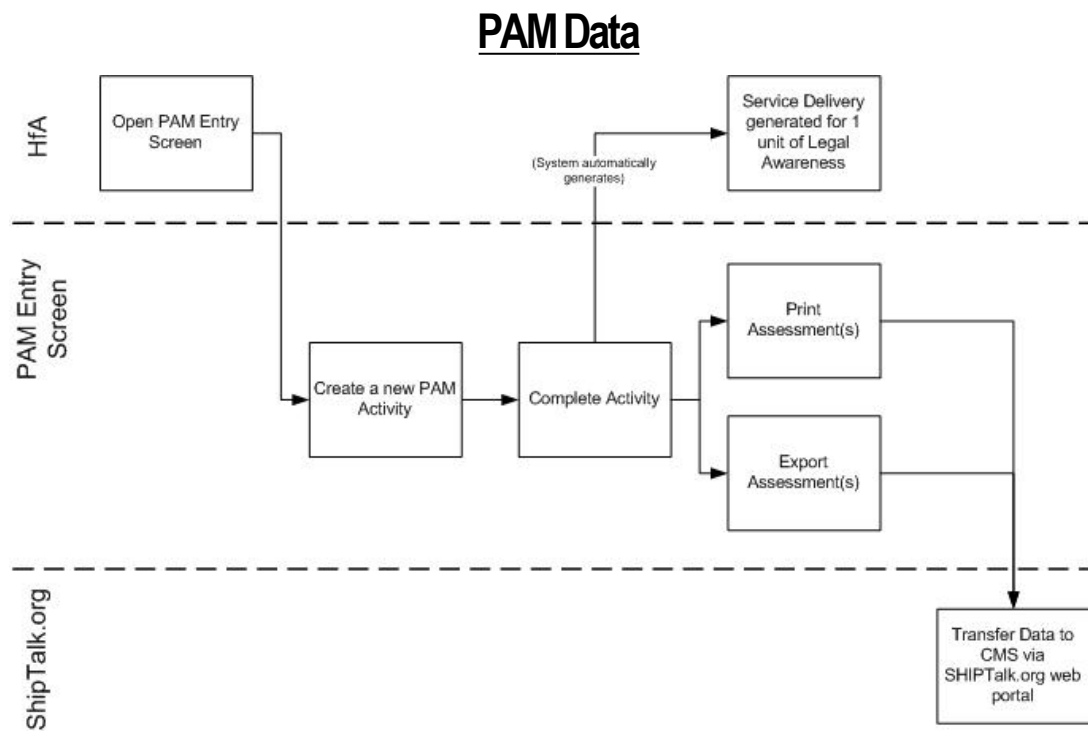
- Easily record all required data elements for the ICC and PAM reports via assessments.
- Review all data entered via summary level reconciliation reports .
- Transfer data to SHIPtalk via manual entry from printed assessments, the summary reports, or by exporting the data to a file which can be uploaded at the SHIPtalk web portal.
- Automatically create service delivery records based on SHIP assessments which can easily be included on NAPIS reports.

**NOTE:**

This guide assumes that the user has a basic understanding of using and printing assessments in Harmony for Aging.

# General Workflow





# Data Collection

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

ICC data is collected using the ICC assessment which is accessed through a specific consumer's record.

PAM data is collected using the PAM assessment which is located under the Tools → SHIP → Enter PAM Activity menu.

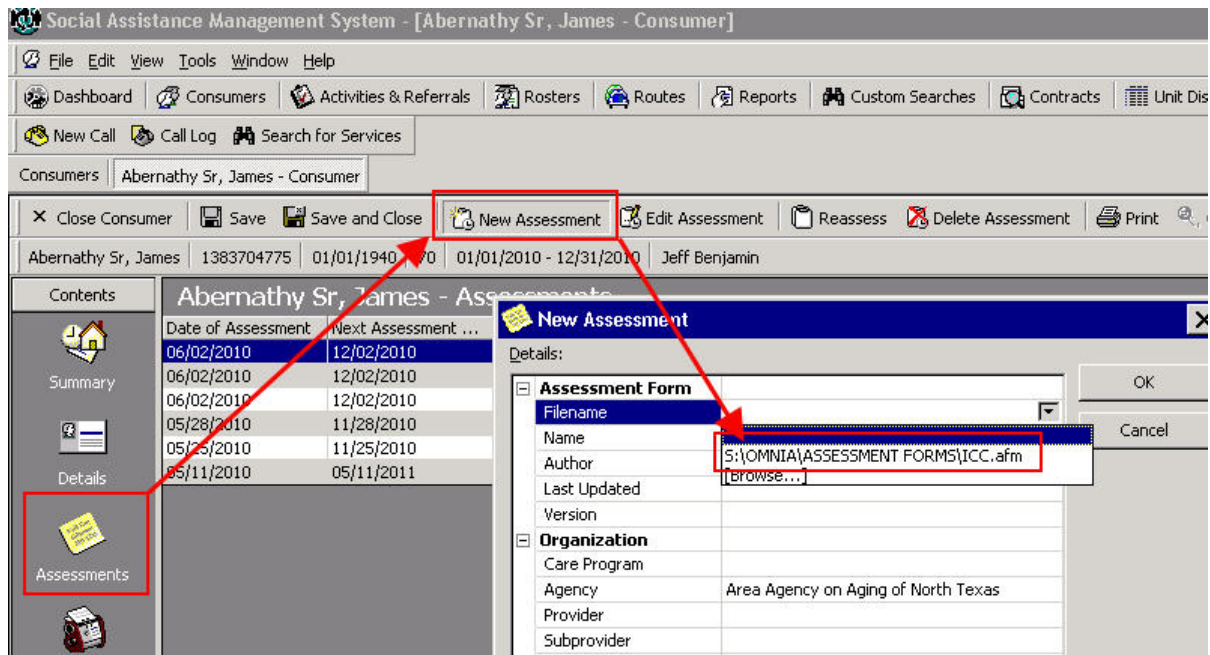
IMPORTANT NOTE:	<ul style="list-style-type: none"><li>▪ These assessments should not be changed by the System Administrator if batch reporting is to be used. The batch generation is coded to look for specific question IDs and adding or deleting questions may affect the performance of this feature.</li><li>▪ Changes to question prompts are permissible (e.g., Client's DOB can be changed to Consumer's DOB).</li></ul>
-----------------	---

---

## ICC Data

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

1. In Harmony for Aging, 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. Select the ICC assessment from the list of available assessments.



4. Complete the assessment.

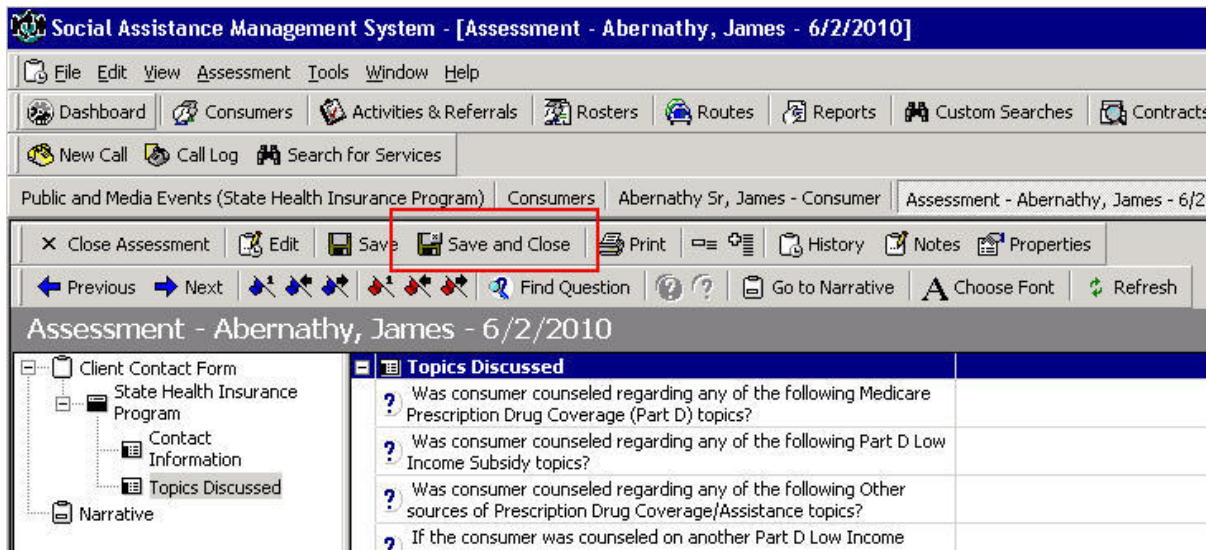
- All required fields will have a red exclamation point next to them. If required data is missing when the user attempts to save the assessment, a message will be displayed prompting the user to complete the missing data.
- Some questions permit multiple answers to be recorded; check as many boxes as are applicable.



The screenshot displays the Social Assistance Management System (SAMS) interface. The main window is titled 'Assessment - Abernathy, James - 6/2/2010'. The left sidebar shows a tree view with 'Client Contact Form', 'State Health Insurance Program', 'Contact Information', 'Topics Discussed', and 'Narrative'. The 'Topics Discussed' section is active, showing a list of topics for discussion. A dialog box titled 'Medicare Advantage' - Multiple-Choice is open, displaying a list of topics with checkboxes. The topics are: Eligibility/Screening, Benefit Explanation, Plans Comparison (checked), Plan Enrollment/Disenrollment, Claims/Billing, Appeals/Grievances, Fraud and Abuse, Marketing/Sales Complaints or Issues, Quality of Care (checked), and Plan Non-Renewal. The 'OK' and 'Cancel' buttons are visible on the right side of the dialog box. The 'Select All' and 'Deselect All' buttons are at the bottom of the dialog box.

- c. Some fields have additional validation. For example, the Counselor User ID field will not allow a user to save the assessment if more than 6 digits are entered into the field. The system will prompt the user to correct fields that have invalid data when saving the assessment.
- d. **Note:** The "Minutes Spent" field will automatically display two decimal places. This is a limitation of the display and will not affect the data on the report.

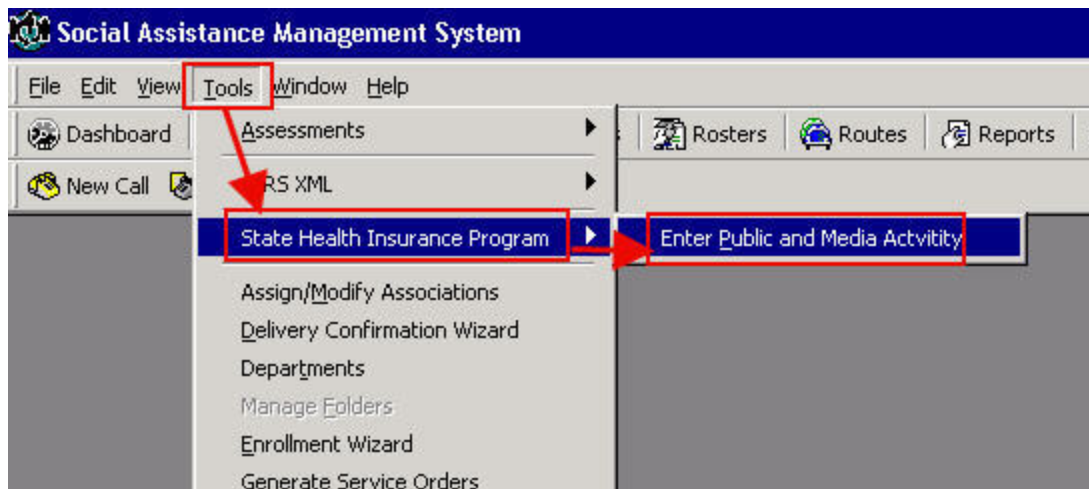
## 5. Save the assessment



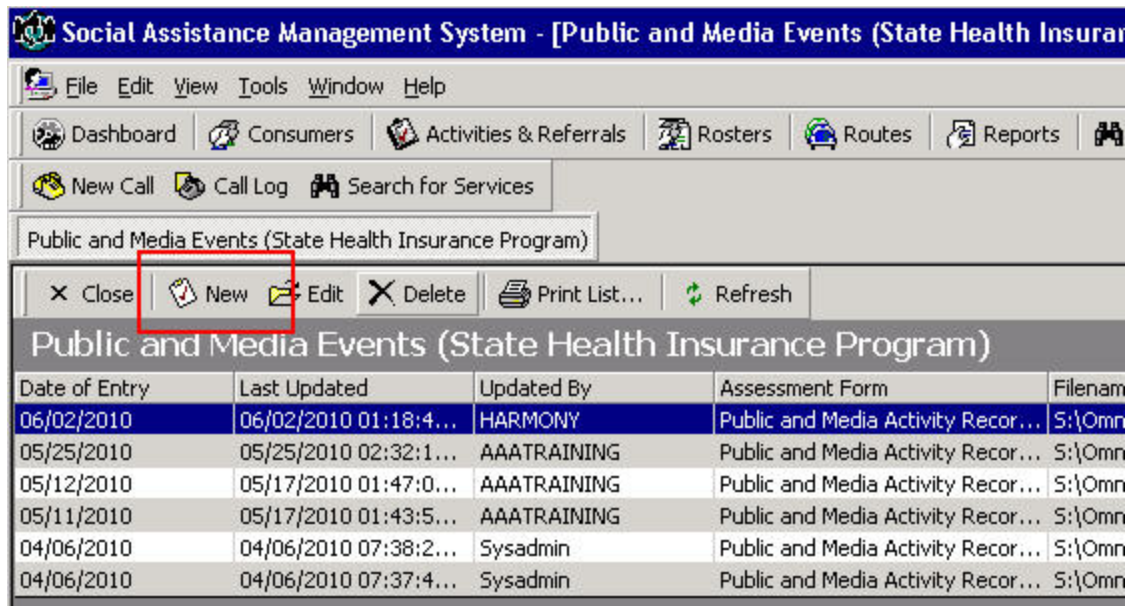
## PAM Data

PAM data is not tied to a specific consumer and is recorded as aggregate data. This data is recorded using the PAM Activity entry feature.

1. In Harmony for Aging, navigate to the PAM Activity list screen.
  - a. Tools → SHIP → Enter Public and Media Activity



2. Create a new activity.



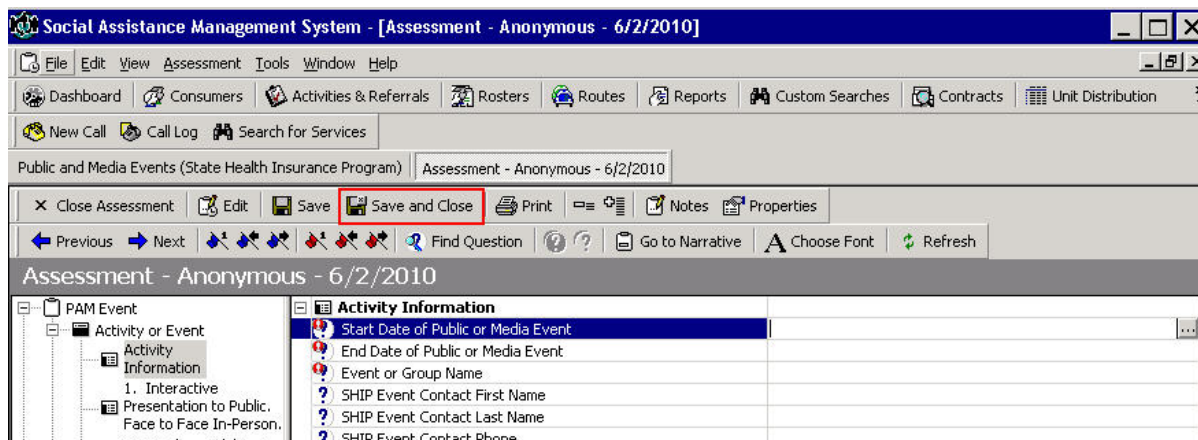
### 3. Complete the activity.

- a. All required fields will have a red exclamation point next to them. If required data is missing when the user attempts to save the assessment, a message will be displayed prompting the user to complete the missing data.

#### Note:

While up to 25 presenters can be included, at least one must be included. More specifically, the data for Presenter 1 must be completed in order to save the assessment.

### 4. Save the activity.



---

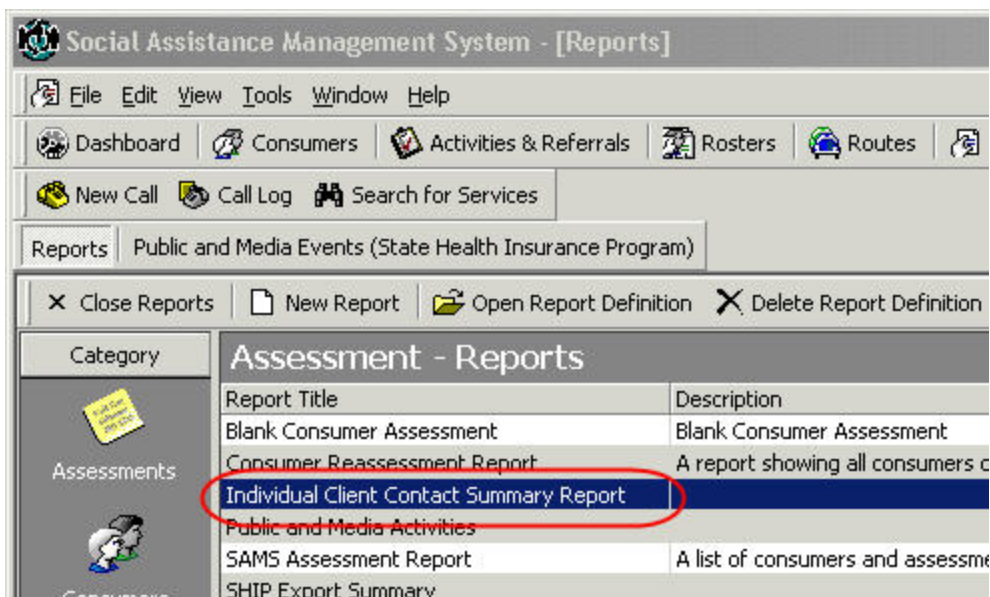
## Administrative Review

Administrators have the ability to run summary reports on reported ICC and PAM data. The summary reports can be used to monitor reporting to CMS, especially when used in conjunction with similar reports available via SHIPtalk.

### ICC Summary Data

Administrators can run a summary report that shows all ICC 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.

1. In Harmony for Aging, navigate to the reports chapter.
2. Select Assessments from the categories in the left-hand pane.
3. Highlight "Individual Client Contact Summary Report".



4. Select "New Report" from the menu options or, if available, select the appropriate report definition.
5. Run the report using one or more of the available filters:
  - a. Date of Assessment
  - b. Assessor Name
  - c. Counselor NPR ID (SHIP ID)
  - d. Assessment Agency
  - e. Assessment Provider

- f. Assessment Subprovider
- g. Assessment Care Program
- h. Assessment Site
- i. Counseling Location Zip Code
- j. Beneficiary Zip Code
- k. Beneficiary County

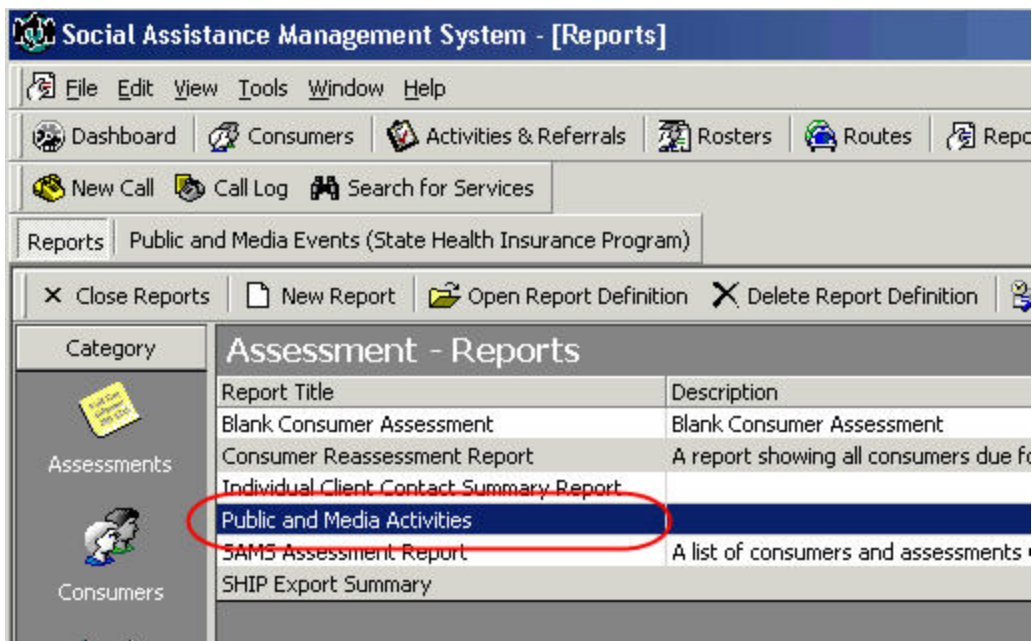
**Note:**

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.

## PAM Summary Data

Administrators can run a summary report that shows all of the PAM 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.

1. In Harmony for Aging, navigate to the reports chapter.
2. Select Assessments from the categories in the left-hand pane.
3. Highlight "Public and Media Activities".



4. Select "New Report" from the menu options or, if available, select the appropriate report definition.
5. Run the PAM Summary report from within Harmony using one or more of the available filters:

- a. Date of Assessment
- b. Assessor Name
- c. Counselor NPR ID (SHIP ID)
- d. Assessment Agency
- e. Assessment Provider
- f. Assessment Subprovider
- g. Assessment Care Program
- h. Assessment Site
- i. Counseling Location Zip Code
- j. Beneficiary Zip Code
- k. Beneficiary County

**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.

---

## Required Configuration

Before using the standard SHIP assessments, please contact Customer Support so that they can perform the following tasks:

1. Install the ICC/PAM assessment forms and ensure that they are accessible
2. Ensure that the Summary Reports are functional



# Data Reporting

Reporting data to CMS can be done using one of two methods.

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

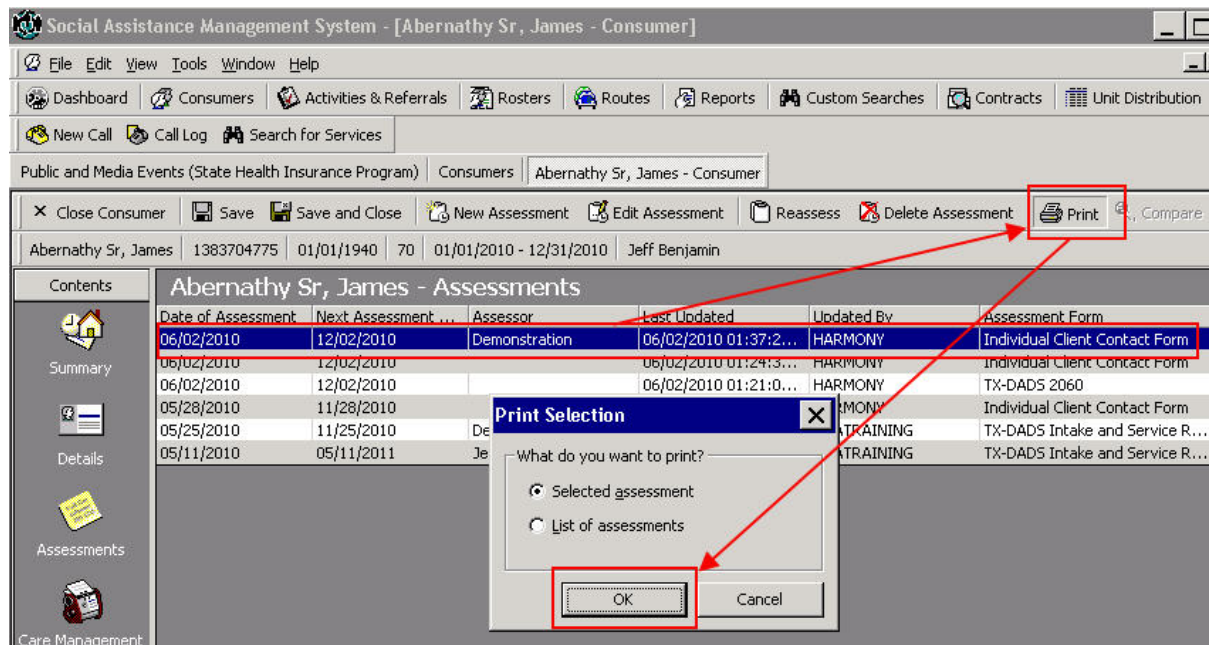
Individual reporting via manual entry is preferable when only a few records need to be added or when corrections or deletions of previously entered data needs to be made.

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 is to print the assessment(s) and key data directly into the SHIPtalk web portal.

1. Navigate to the appropriate assessment in the consumer's record (ICC) or the PAM Activity area (PAM).
2. Print the assessment.
  - a. Highlight the assessment and click print.



3. Use the printed copy to transfer the data to CMS.
  - a. Login to SHIPtalk.

- b. Enter the data through the web portal.

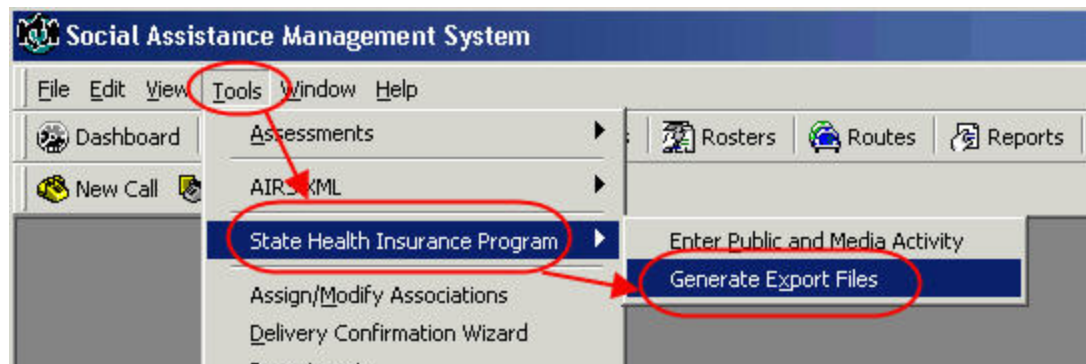
## Batch Reporting

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. The file is uploaded through the SHIPtalk web portal.

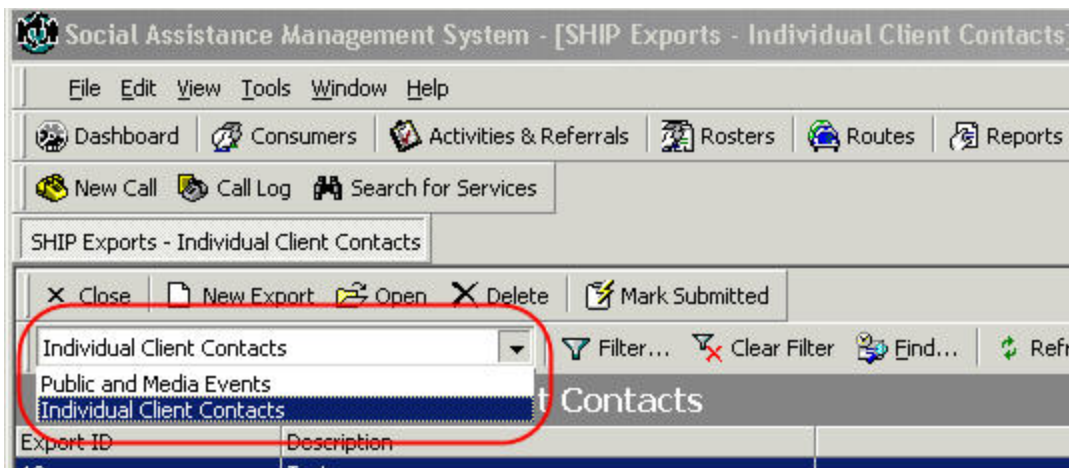
### Generating a Batch

The first step in reporting a large number of records to CMS is the creation of a batch or export file that contains the desired data. This is done from the SHIP screen accessed via the Tools menu.

1. In Harmony for Aging, navigate to the SHIP Export screen.
  - a. Tools → SHIP → Export Data



2. Select the type of export or batch to be created. The choices are ICC Data or PAM Data.





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

3. Select "New Export".



4. A selection screen will be presented. Specify the assessment date range and agency to be included in the file.
  - a. The dates reflect the assessment dates, NOT the contact or activity dates.
5. Click the "Generate Export" button.
  - a. If another export has been created that has not been marked as "Submitted Successfully" and has the same or overlapping selection criteria, the system will not generate a file. A message will be displayed instructing the user to complete the existing export or to revise the agency or date range on the current export.



**Note:** The same criteria can be used for multiple exports as long as all of the exports except the one currently being created are marked as 'Successfully submitted'.

6. Harmony for Aging will automatically review and validate that all of the required data is present and in the correct format.
7. If any errors are found, the file will not be created and dialog box with 3 options will be presented.
  - a. Continue: Generate the export, automatically excluding the problematic records. The records which are excluded would be available for future exports.

- b. View Errors: Abort the export and view the problematic records. (See "Viewing and Correcting Errors" on page 21)
- c. Cancel: Abort the export without viewing the problematic records.



8. If the data passes validation, an export file will be created and the user will be prompted to save the file.

**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 SHIPtalk), any changes, corrections, or deletions must be done through the SHIPtalk web portal.

## Saving a Batch

When an export is generated, the user will be prompted to save the file.

1. Select "Save".
2. Browse to the appropriate folder.
3. Save the file.

**Note:**

The system will automatically save the file using one of the formats below. Please do not alter the filename prior to submission. CMS / SHIPtalk require that the filename be in this specific format in order to be processed.

CC\_mmddyyyy\_hhmmss.txt

PAM\_mmddyyyy\_hhmmss.txt

where ICC/PAM are the assessment type, mmddyyyy is the date the file was created, and hhmmss is the time the file was created.

## Submitting a Batch 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.

1. Login to SHIPtalk.

The screenshot shows the SHIPtalk login interface. The header features the 'The National SHIP Resource Center' logo, the 'SHIPtalk' title, and a '\*\*Demo Site\*\*' banner. Navigation links for 'Find a SHIP', 'Find a Counselor', and 'REGISTER' are present. A login section on the left, outlined with a red box, includes a text input for 'Log On Username (email)', a password field, a 'GO >>' button, and a 'Forgot password?' link. To the right, a 'What is SHIPtalk?' section provides a brief description of the program.

2. Select the "Upload" tab.

This screenshot displays the SHIPtalk user dashboard after login. The header remains the same. The navigation bar now includes a 'Welcome user@email.com' message and a series of tabs: 'Agency', 'User', 'EditMyProfile', 'RR', 'CC', 'PAM', 'Upload', 'SHIPProfile', 'NPRReports', and 'Logout'. The 'Upload' tab is highlighted with a red circle. Below the navigation bar, there is a 'Search Users' section with a brief explanation of the search functionality and links to 'User List' and 'Add a New User'.

3. Browse for the appropriate file.
4. Click "Validate".
  - a. If the file passes validation, a new "Process" button will appear. Click this to complete the upload.
5.
  - 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.

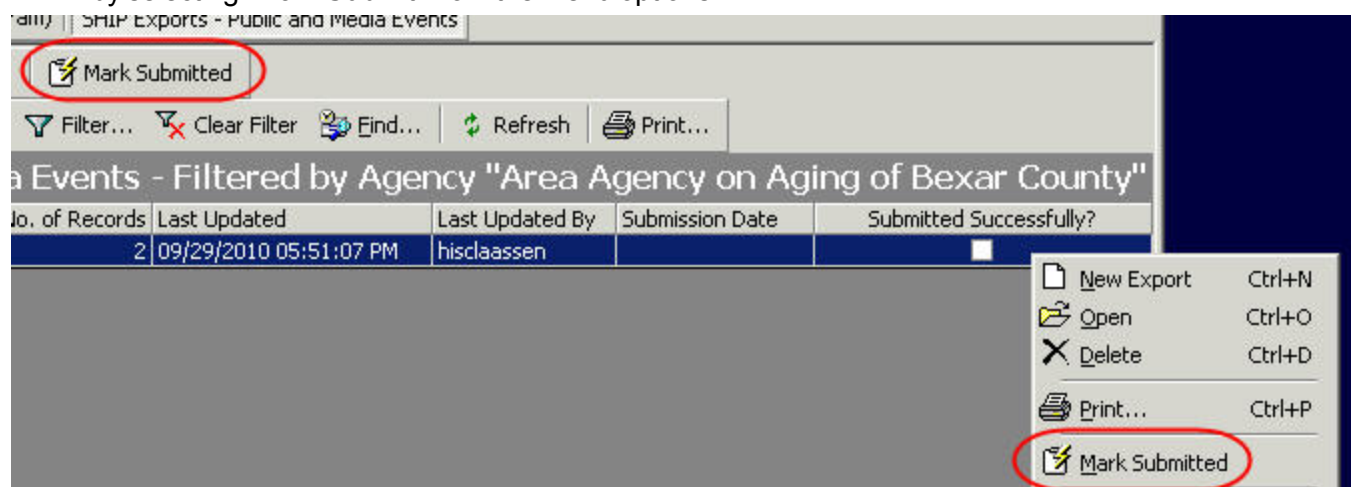
**Note:** If a file does not pass validation, none of the records in the file will be uploaded.

## 6. Logout of SHIPtalk

## Completing a Batch

Once an export has been successfully uploaded to SHIPtalk, the user must update the status in Harmony for Aging so that those records are marked as having been reported.

1. In Harmony for Aging, navigate to the PAM Activity list screen.
2. Tools → SHIP → Export Data
3. Highlight the appropriate export.
4. Mark the export as "Submitted Successfully" by right clicking and selecting "Mark Submit" or by selecting "Mark Submit" from the menu options.



### IMPORTANT NOTE:

Once an export has been marked as successfully submitted, the export file will be converted to a read-only status and will no longer be editable. To prevent duplicate submissions, any assessment included in an export that

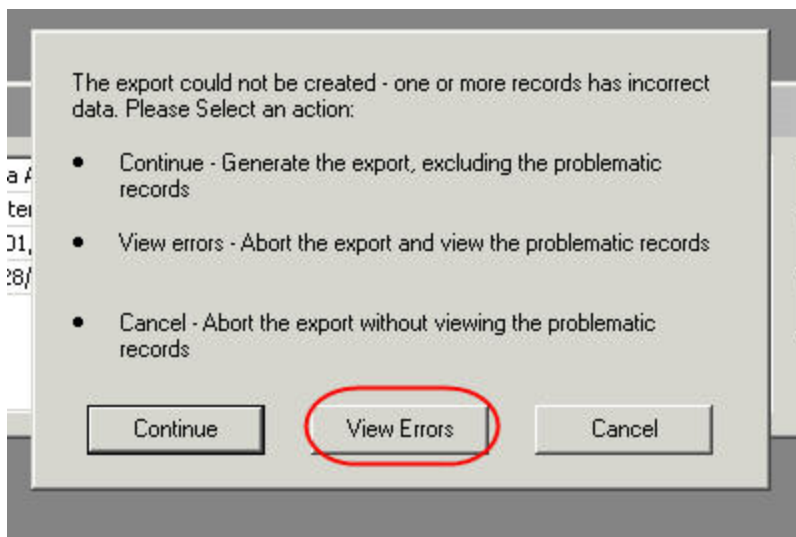
has been marked in this way will not be able to be included in any other export.

## Viewing and Correcting Errors

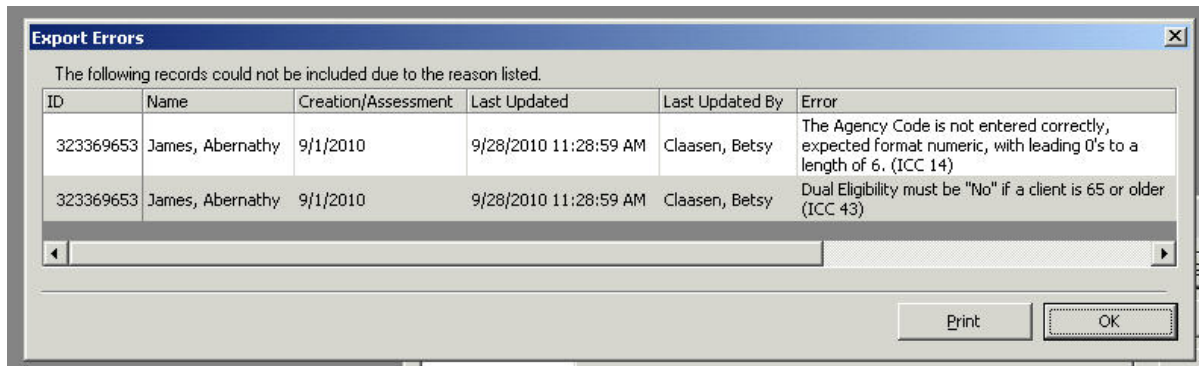
Harmony for Aging's SHIP assessments are designed to ensure that all required data is entered and is in the correct format during data entry. However, should data be missing or in an incorrect format, it will be caught during the creation of a batch for export.

When error occur, batch creation is halted and the user is presented with three options. One of those is to view the errors.

1. Follow the steps to create a batch (See "Generating a Batch" on page 16)
2. When the dialog box is presented, select "View Errors".



3. An error log screen will be presented which displays all of the errors in the batch.
  - a. If an assessment has more than one error, it will appear multiple times in the error log screen with a single row per error.
  - b. The data in the first 4 columns can be used to identify the specific assessment that needs to be corrected while the 5th column describes the problem.
    - i. ID: The client's ID number; this will only be populated for ICC exports
    - ii. Name: The client's name; this will only be populated for ICC exports.
    - iii. Creation/Assessment Date: The date the assessment was created.
    - iv. Last Updated: The date and time the assessment was last updated.
    - v. Last Updated By: The person that last saved the assessment.
    - vi. Error: A description of the error and an associated error code.



4. Make a note of any errors or use the "Print" button to generate a paper copy of the errors.
5. Navigate to the appropriate assessment.
6. Open and edit the assessment as needed.
7. Save and close the assessment.
8. Generate a new batch using the corrected assessment. (See "Generating a Batch" on page 16).

## Editing or Deleting a Batch

Batches that have been started, but have not yet been marked as successfully submitted to CMS may be edited or deleted.

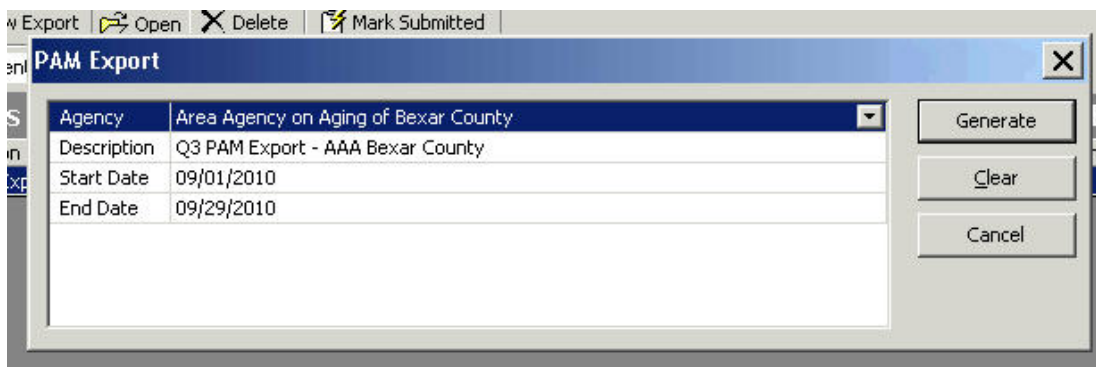
## Editing a Batch

To edit or modify an existing batch,

1. In Harmony for Aging, navigate to the SHIP Export screen.
  - a. Tools → SHIP → Export Data
2. Highlight the batch to be modified by clicking on it.
3. Click on the "Open" button.



- The selection screen will open and the date range and/or agency can be modified.



- When modifications are complete, select "Generate" and proceed using the same steps outlined in Generating a Batch (page 16).

## Deleting a Batch

To delete an existing batch,

- In Harmony for Aging, navigate to the SHIP Export screen.
  - Tools → SHIP → Export Data
- Select the batch to be deleted by clicking on it.
- Click on the "Delete" button.





4. The batch will be deleted and removed from the data list.

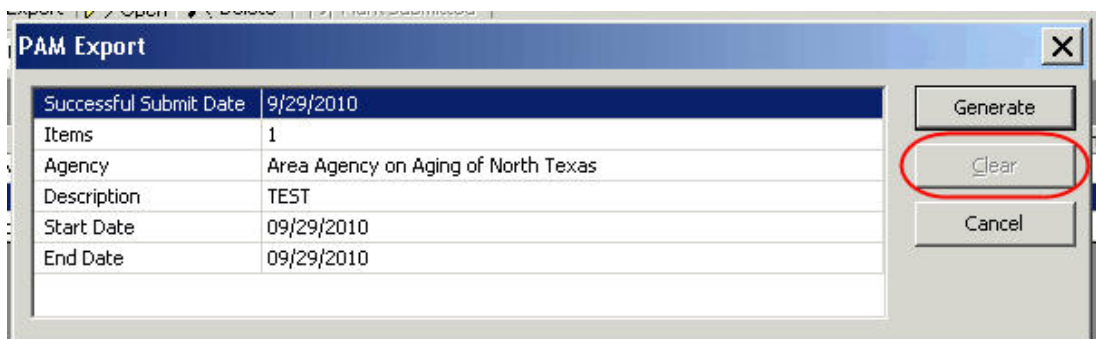
#### IMPORTANT NOTE:

- It is not possible to delete a batch that has been marked as successfully submitted to CMS.
- Deleting a batch that has not yet been marked as successfully submitted to CMS does allow the assessments associated with the deleted batch to be available for inclusion in a subsequent batch.

## Re-exporting a Successfully Submitted Batch

It is possible to re-export a batch that has already been marked as successfully submitted.

1. In Harmony for Aging, navigate to the SHIP Export screen.
  - a. Tools → SHIP → Export Data
2. Select the batch to be re-exported by clicking on it.
3. Click on the "Open" button.
4. The selection screen will be presented, but the criteria will not be editable and the "Clear" button will be disabled.



5. Select "Generate" and save the file to the appropriate folder when prompted.



**Notes:**

- If an underlying assessment has been modified since the export was originally generated (e.g., a consumer's zip code was updated), the regenerated export will contain the current, not the historical, data (the new zip code will be present, not the old).
- If one or more assessments which were included in the original export, the regenerated export will not contain the data from the deleted assessments.
- If assessments have been entered in the system that meet the original selection criteria but were not part of the original export, they will NOT be included in the regenerated export. They can be exported by creating a new export.
- Regenerated file names will contain the current date and time, not the date and time of the original file.

# Automated Service Delivery Creation

The creation of service delivery records is an optional feature and may not be active in all implementations.

## 1. ICC Assessment

- a. If the consumer is 60 years old or older, Harmony for Aging will automatically create a service delivery record for the consumer group "SHIP – ICC Legal Assistance". The service will be listed as "Legal Services" and can be mapped, if desired, to the appropriate field(s) on a NAPIS export.
- b. The system will increment the "Units" and "Number of Consumers Served" fields in the service delivery record by 1 for each assessment that meets the criteria.
- c. The service for the ICC report cannot be changed; "Legal Services" is the only valid service.
- d. The criteria for creating a service delivery based on the ICC assessment cannot be changed.

## 2. PAM Assessment

- a. When the PAM assessment is saved, Harmony for Aging will automatically create a service delivery record for the consumer group "SHIP – PAM Legal Awareness" based on the data in the assessment. The service will be listed as "Legal Awareness" and can be mapped, if desired, to the appropriate field(s) on a NAPIS export.
- b. The system will increment the "Units" by 1 and "Number of Consumers Served" by the sum of the answers (1 for each of the 7 topic areas) to the "Total number of attendees" fields in the service delivery record for each assessment that meets the criteria.
- c. The service for the PAM report cannot be changed; "Legal Awareness" is the only valid service.
- d. The criteria for creating a service delivery based on the PAM assessment cannot be changed.

**Notes:**

- The system will create ICC delivery records in association with the ICC consumer group, not in association with specific consumers.
- Assessments can be edited and updated as desired, but the service delivery record will be created once, during the overnight hours and will not be updated based on a change within a single assessment. Due to the nature of consumer groups, the number of units and number of consumers served will be incremented with the service delivery record associated with each month of service as assessments are added.
- If an assessment is deleted (e.g., created in error or in duplicate) and the matching service delivery record has already been created, the user will need to manually delete the service delivery record. The system will not automatically delete the matching service delivery records.
- The system will create service delivery records regardless of the whether or not the assessment is complete. The system only considers whether or not a service delivery record was previously created for the assessment or not.
- If the appropriate SHIP service codes and/or consumer groups are not present, the system will not create any service delivery records.
- The system will not create a service delivery record for any assessment that does not have the agency and provider specified. The system will not provide the end user with any notification that a record was not created.

---

## Required Configuration

In order for service delivery records to be properly created, the following configuration is required. This task should be done by Harmony Implementation staff or a Harmony for Aging system administrator.

1. Create SHIP specific services (one each for the ICC and PAM assessments)
  - a. Create services with the following names. Note that the service descriptions must be entered EXACTLY as below or the feature will not work.
    - i. SHIP – Legal Assistance Age 60 and Over
    - ii. SHIP – Legal Awareness
  - b. Harmony recommends the following additional attributes, though these may be adjusted as needed:

- i. Service Code: NULL
  - ii. HCPCS Code: NULL
  - iii. SAMScan ID: NULL
  - iv. Service Category: Other Services
  - v. Unit Type: Contact
  - vi. Napis Service: NAPIS Other
  - vii. Active: Yes
  - viii. Local: No
  - ix. Requires Contract: No
- c. Associate the services to the applicable existing Care Program
- d. Associate the services to the applicable Agency Provider record(s)
- 2. Create SHIP specific consumer groups (one each for the ICC and PAM assessments)
  - a. Create 2 consumer groups with the following names. Note that the descriptions must be entered EXACTLY as below or the feature will not work.
    - i. SHIP – ICC Legal Assistance
    - ii. SHIP – PAM Legal Awareness
  - b. Harmony recommends the following additional attributes, though these may be adjusted as needed:
    - i. Date Registered: Date group is created
    - ii. Status: Active = Yes
    - iii. All other fields on the General tab and all data on other tabs can be left at system defaults
  - c. Each group should be enrolled with one (and only one) service program.
    - i. The group's care enrollment will be used to determine the care program on the service delivery record.
- 3. Install the ICC/PAM assessment forms and ensure that they are accessible
  - a. Be sure that the details/add new section of each assessment is configured so that the following fields are required. If these fields are not completed, then the system will not created a service delivery record for that assessment.
    - i. Agency
    - ii. Provider
- 4. Ensure that the Summary Report is functional.

# Validation

When a user saves an ICC Assessment or PAM Activity, Harmony will automatically validate the data in each field as indicated in the tables below. If response fails the validation check, the user will be prompted to correct the data and then save.

Harmony also validates the data when generating an export. If a response fails the validation check, the export will not generate and the user will be prompted to continue the export, excluding the problematic records or to abort the export.

---

## Table Definitions and Layout

- **Field Name:** The question/response on the assessment or activity.
- **Required?:** “Y” indicates that the field cannot be left blank and will have a red exclamation point next to it on the input screen. “N” indicates that the field can be left blank.
- **Data Type**
- **Boolean:** The user must enter one of two possible choices. This is typical for Yes/No and True/False questions.
- **Date:** The user must enter a date using the mm/dd/yyyy format.
- **Decimal:** The user may enter only numbers, but can include decimals.
- **Numeric:** The user may only enter numbers.
- **Text:** The user may enter letters, numbers, and special characters.
- **Max Length:** The maximum number of characters that can be entered in to the field
- **Additional Validation:** Any additional criteria a response must meet.

## ICC Data Validation

Field name	Required?	Data Type	Max Length	Additional Validation
Action	Yes	Text	1	
State FIPS Code	Yes	Text	2	
Unique Record ID	Yes	Text	40	
Unique Client ID used by your Agency or State	Yes	Text	40	
Client First Name	No	Text	50	
Client Last Name	No	Text	50	
Client Phone Number	No	Text	20	
Representative First Name	No	Text	50	
Representative Last Name	No	Text	50	
How Did Client Learn About the SHIP	Yes	Numeric	2	
ZIP Code of Client Residence	Yes	Text	5	Use 99999 if a client's zip code cannot be determined
FIPS CountyCode of Client Residence	No	Text	5	
Counselor User ID	Yes	Numeric	6	
Agency Code	Yes	Text	6	
FIPS CountyCode of Counselor Location	Yes	Text	5	
ZIP Code of Counselor Location	Yes	Text	5	Cannot be 99999
Method of Contact	Yes	Numeric	1	
Date of Contact	Yes	Date	10	
First Vs Continuing Contact	Yes	Numeric	1	
Client Age Group	Yes	Numeric	1	
Client Gender	Yes	Numeric	1	
<b>Client Race-Ethnicity</b>				At least one field must be set to "Yes"
Hispanic, Latino or Spanish Origin	No	Boolean	5	
White, Non-Hispanic	No	Boolean	5	
Black, African American	No	Boolean	5	
American Indian or Alaska Native	No	Boolean	5	

Field name	Required?	Data Type	Max Length	Additional Validation
Asian Indian	No	Boolean	5	
Chinese	No	Boolean	5	
Filipino	No	Boolean	5	
Japanese	No	Boolean	5	
Korean	No	Boolean	5	
Vietnamese	No	Boolean	5	
Native Hawaiian	No	Boolean	5	
Guamanian or Chamorro	No	Boolean	5	
Samoan	No	Boolean	5	
Other Asian	No	Boolean	5	
Other Pacific Islander	No	Boolean	5	
Some Other Race / Ethnicity	No	Boolean	5	
Not Collected	No	Boolean	5	
Client Primary Language Other Than English	Yes	Numeric	1	
Client Monthly Income	Yes	Numeric	1	
Client Assets	Yes	Numeric	1	
Receiving or Applying for Social Security Disability or Medicare Disability	Yes	Numeric	1	Must be "No" if client is 65 or older
Dual Eligible with Mental Illness Mental Disability	Yes	Numeric	1	
<b>TOPICS</b>				At least one item from the topics below must be populated (all topics cannot be blank)
<b>Topic: PRESCRIPTION DRUG ASSISTANCE</b>				
Eligibility/Screening	No	Boolean	5	
Benefit Explanation	No	Boolean	5	
Plans Comparison	No	Boolean	5	
Plans Enrollment/Disenrollment	No	Boolean	5	
Claims/Billing	No	Boolean	5	
Appeals/Grievances	No	Boolean	5	
Fraud and Abuse	No	Boolean	5	
Marketing/Sales Complaints or Issues	No	Boolean	5	
Quality of Care	No	Boolean	5	

Field name	Required?	Data Type	Max Length	Additional Validation
Plan Non-Renewal	No	Boolean	5	
<b>Topic: Part D Low Income Subsidy</b>				
Eligibility/Screening	No	Boolean	5	
Benefit Explanation	No	Boolean	5	
Application Assistance	No	Boolean	5	
Claims/Billing	No	Boolean	5	
Appeals/Grievances	No	Boolean	5	
Topic: Other Prescription Assistance				
Union/Employer Plan	No	Boolean	5	
Military Drug Benefits	No	Boolean	5	
Manufacturer Programs	No	Boolean	5	
State Pharmaceutical Assistance Programs	No	Boolean	5	
Other	No	Text	255	
<b>Topic: Medicare (Parts A &amp; B)</b>				
Eligibility	No	Boolean	5	
Benefit Explanation	No	Boolean	5	
Claims/Billing	No	Boolean	5	
Appeals/Grievances	No	Boolean	5	
Fraud and Abuse	No	Boolean	5	
Quality of Care	No	Boolean	5	
<b>Topic: MEDICARE ADVANTAGE</b>				
Eligibility/Screening	No	Boolean	5	
Benefit Explanation	No	Boolean	5	
Plans Comparison	No	Boolean	5	
Plan Enrollment/Disenrollment	No	Boolean	5	
Claims/Billing	No	Boolean	5	
Appeals/Grievances	No	Boolean	5	
Fraud and Abuse	No	Boolean	5	
Marketing/Sales Complaints or Issues	No	Boolean	5	
Quality of Care	No	Boolean	5	
Plan Non-Renewal	No	Boolean	5	
<b>Topic: MEDICARE SUPPLEMENT/SELECT</b>				
Eligibility/Screening	No	Boolean	5	
Benefit Explanation	No	Boolean	5	
Plans Comparison	No	Boolean	5	



Field name	Required?	Data Type	Max Length	Additional Validation
Claims/Billing	No	Boolean	5	
Appeals/Grievances	No	Boolean	5	
Fraud and Abuse	No	Boolean	5	
Marketing/Sales Complaints or Issues	No	Boolean	5	
Quality of Care	No	Boolean	5	
Plan Non-Renewal	No	Boolean	5	
<b>Topic: MEDICAID</b>				
Medicare Savings Programs (MSP) Screening (QMB,SLMB,QI)	No	Boolean	5	
MSP Application Assistance	No	Boolean	5	
Medicaid (SSI, Nursing Home, MEPS, Elderly Waiver) Screening	No	Boolean	5	
Medicaid Application Assistance	No	Boolean	5	
Medicaid/QMB Claims	No	Boolean	5	
Fraud and Abuse	No	Boolean	5	
<b>Topic: OTHER</b>				
Long Term Care (LTC) Insurance	No	Boolean	5	
LTC Partnership	No	Boolean	5	
LTC Other	No	Boolean	5	
Military Health Benefits	No	Boolean	5	
Employer/Federal Employer Health Benefits (FEHB)	No	Boolean	5	
COBRA	No	Boolean	5	
Other Health Insurance	No	Boolean	5	
Other	No	Text	255	
Hours Spent	Yes	Numeric	2	
Minutes Spent	Yes	Numeric	2	
Status	Yes	Numeric	1	
<b>Nationwide and CMS Special Use Fields</b>				
Field 01	No	Text	10	
Field 02	No	Text	10	
Field 03	No	Text	10	
Field 04	No	Text	10	

Field name	Required?	Data Type	Max Length	Additional Validation
Field 05	No	Text	10	
Field 06	No	Text	10	
Field 07	No	Text	10	
Field 08	No	Text	10	
Field 09	No	Text	10	
Field 10	No	Text	10	
<b>State and Local Special Use Fields</b>				
Field 01	No	Text	10	
Field 02	No	Text	10	
Field 03	No	Text	10	
Field 04	No	Text	10	
Field 05	No	Text	10	
Field 06	No	Text	10	
Field 07	No	Text	10	
Field 08	No	Text	10	
Field 09	No	Text	10	
Field 10	No	Text	10	
Comments	No	Text	1000	

## PAM Data Validation

Field name	Required?	Data Type	Max Length	Additional Validation
Action	Yes	Text	1	
State FIPS Code	Yes	Text	2	
Unique Record ID	Yes	Text	40	
Agency Code	Yes	Text	6	
<b>Presenters (Up to 25 presenters may be recorded)</b>				At least one presenter must be recorded
Presenter 1				Presenter 1 must be populated
Presenter SHIP User ID	Yes	Numeric	6	
Presenter First Name	Yes	Text	50	
Presenter Last Name	Yes	Text	50	
Affiliation	No	Text	255	
Total Hours Spent on Activity	Yes	Decimal	7	
<b>Presenter 2 - 25</b>				Presenters 2 – 25 are optional
Presenter SHIP User ID	Conditional	Numeric	6	
Presenter First Name	Conditional	Text	50	
Presenter Last Name	Conditional	Text	50	
Affiliation	No	Text	255	
Total Hours Spent on Activity	Yes	Decimal	7	
<b>Activity or Event</b>				At least one activity or event must be recorded
<b>1. Interactive Presentation to Public. Face to Face In-Person.</b>				
Estimated Number of Attendees	No	Numeric	3	
Estimated Persons Provided Enrollment Assistance	No	Numeric	3	
<b>2. Booth or Exhibit. At Heath Fair, Senior Fair, or Special Event.</b>				
Estimated Number of Direct Interactions with Attendees	No	Numeric	4	
Estimated Persons Provided Enrollment Assistance	No	Numeric	4	
<b>3. Dedicated Enrollment Event Sponsored By SHIP or in Partnership.</b>				

Field name	Required?	Data Type	Max Length	Additional Validation
Estimated Number Persons Reached at Event Regardless of Enroll Assistance	No	Numeric	3	
Estimated Number Persons Provided Any Enrollment Assistance	No	Numeric	3	
Estimated Number Provided Enrollment Assistance with Part D	No	Numeric	3	
Estimated Number Provided Enrollment Assistance with LIS	No	Numeric	3	
Estimated Number Provided Enrollment Assistance with MSP	No	Numeric	3	
Estimated Number Provided Enrollment Assist Other Medicare Program	No	Numeric	3	
<b>4. Radio Show. Live or Taped. Not a Public Service Announce or Ad.</b>				
Estimated Number of Listeners Reached	No	Numeric	6	
<b>5. TV or Cable Show. Live or Taped. Not a Public Service Announce or Ad.</b>				
Estimated Number of Viewers Reached	No	Numeric	6	
<b>6. Electronic Other Activity. PSAs, Electronic Ads, Crawls, Video Conf, Web Conf, Web Chat</b>				
Est Persons Viewing or Listening to PSA, Electronic Ad, Crawl Across Entire Campaign, Video Conf, Web Conf, Web Chat	No	Numeric	7	
<b>7. Print Other Activity. Newspaper, Newsletter, Pamphlets, Fliers, Posters, Targeted Mailings</b>				
Est Persons Reading Article, Newsletter, Ad or Pieces of Targeted Mail or Other Printed Across Entire Campaign	No	Numeric	7	
Start Date Of Activity	Yes	Date	10	
End Date Of Activity	Yes	Date	10	
Event or Group Name	Yes	Text	255	
Contact First Name	No	Text	50	
Contact Last Name	No	Text	50	
Contact Phone	No	Text	20	
State Code of Event	Yes	Text	2	
County FIPS Code of Event	Yes	Text	5	

Field name	Required?	Data Type	Max Length	Additional Validation
ZIP Code of Event	Yes	Text	5	
City of Event	Yes	Text	50	This is automatically set using the zip code and county provided. If an error message occurs indicating the city could not be determined, please check that the zip code and county information is correct.
Street Address of Event	Yes	Text	100	
<b>Topic Focus</b>				At least one topic focus must be selected.
Medicare Parts A and B	No	Boolean	5	
Plan Issues - Non-Renewal, Termination, Employer-COBRA	No	Boolean	5	
Long-Term Care	No	Boolean	5	
Medigap - Medicare Supplements	No	Boolean	5	
Medicare Fraud and Abuse	No	Boolean	5	
Medicare Prescription Drug Coverage - PDP / MA-PD	No	Boolean	5	
Other Prescription Drug Coverage - Assistance	No	Boolean	5	
Medicare Advantage	No	Boolean	5	
QMB - SLMB - QI	No	Boolean	5	
Other Medicaid	No	Boolean	5	
General SHIP Program Information	No	Boolean	5	
Medicare Preventive Services	No	Boolean	5	
Low-Income Assistance	No	Boolean	5	
Dual Eligible with Mental Illness Mental Disability	No	Boolean	5	
Volunteer Recruitment	No	Boolean	5	
Partnership Recruitment	No	Boolean	5	
Other Topics - Describe:	No	Text	255	
<b>Target Audiences</b>				At least one target audience must be selected.
Medicare Pre-Enrollees - Age 45-64	No	Boolean	5	
Medicare Beneficiaries	No	Boolean	5	
Family Members - Caregivers of Medicare Beneficiaries	No	Boolean	5	

Field name	Required?	Data Type	Max Length	Additional Validation
Low-Income	No	Boolean	5	
Hispanic, Latino, or Spanish Origin	No	Boolean	5	
White, Non-Hispanic	No	Boolean	5	
Black, African American	No	Boolean	5	
American Indian or Alaska Native	No	Boolean	5	
Asian Indian	No	Boolean	5	
Chinese	No	Boolean	5	
Filipino	No	Boolean	5	
Japanese	No	Boolean	5	
Korean	No	Boolean	5	
Vietnamese	No	Boolean	5	
Native Hawaiian	No	Boolean	5	
Guamanian or Chamorro	No	Boolean	5	
Samoan	No	Boolean	5	
Other Asian	No	Boolean	5	
Other Pacific Islander	No	Boolean	5	
Some Other Race-Ethnicity	No	Boolean	5	
Disabled	No	Boolean	5	
Rural	No	Boolean	5	
Employer-Related Groups	No	Boolean	5	
Mental Health Professionals	No	Boolean	5	
Social Work Professionals	No	Boolean	5	
Dual-Eligible Groups	No	Boolean	5	
Partnership Outreach	No	Boolean	5	
Presentations to Groups in Languages Other Than English	No	Boolean	5	
Other Audiences - Describe:	No	Text	255	
<b>Nationwide and CMS Special Use Fields</b>				
Field 01	No	Text	10	
Field 02	No	Text	10	
Field 03	No	Text	10	
Field 04	No	Text	10	
Field 05	No	Text	10	
Field 06	No	Text	10	
Field 07	No	Text	10	
Field 08	No	Text	10	
Field 09	No	Text	10	

Field name	Required?	Data Type	Max Length	Additional Validation
Field 10	No	Text	10	
<b>State and Local Special Use Fields</b>				
Field 01	No	Text	10	
Field 02	No	Text	10	
Field 03	No	Text	10	
Field 04	No	Text	10	
Field 05	No	Text	10	
Field 06	No	Text	10	
Field 07	No	Text	10	
Field 08	No	Text	10	
Field 09	No	Text	10	
Field 10	No	Text	10	