STARS

Web-Based Program
For Voluntary Agencies

Quick Start Guide

Prepared by:
Center for Development of Human Services

About the STARS Web-Based Program for Voluntary Agencies

The Office for Children and Family Services (OCFS) and the Office of Temporary Disability Assistance (OTDA) has worked closely with The Center for the Development of Human Services (CDHS) to develop a web-based program that is accessible via the World Wide Web and directly through the Connections network. The STARS web-based program offers several benefits:

- Real-Time Training Registration: Promotes a paperless process that allows agencies to register staff online for all OCFS and OTDA funded training
- User-Friendly Features: Designed to ease the registration process; and
- Reports: Immediate access to training reports

STARS allows real-time registration processing, which means that when a user submits a registration request for a State-sponsored training, the provider immediately has access to the registration information and can process it accordingly.

The Training Registration Process

The following steps describe the training registration process:

1. State staff enters agencies into the system. Once an agency has been entered into the system, designated staff (Training Coordinators) can register members of its staff for training.
2. The agency receives a StarsId and Password that must be used to access the system.
3. A state-sponsored course is entered into STARS by the state training provider, including the specific days, times, and locations of its offerings.
4. The state training provider announces the state-sponsored training.
5. Agencies enter and register staff for state-sponsored training. Before an agency can register a staff member for any training, some basic information about the staff member must be entered into STARS one time by the agency.
6. STARS will e-mail training confirmation memos for all participants registered for the class.
7. The state training provider conducts state-sponsored training.
8. The state training provider updates training attendance.
9. The state training provider closes the training file.
10. Training reports are generated and used to assess the success of training deliveries and to track staff participation in the training.

What Internet Browser to Use

The STARS Training Registration program should be accessed with Internet Explorer 6 or above. Controls will not function properly in other browsers, such as Netscape and Opera.

The Best Screen Resolution

The STARS program is optimized to be displayed at a screen resolution of 1024 x 768. If your computer is running at a resolution of 800 x 600 or below, you will have to scroll horizontally and vertically on many of the screens. You will also not be able to view as much of the screen as you would at 1024 x 768.

STARS Website

The address of the STARS website is http://stars.bsc-cdhs.org. The STARS portal contains seven menus: Home, ACS (Administration for Children's Services), HRA (Human Resources Administration), Local Districts, Public Agencies, Training Providers, Voluntary Agencies, Connections State, and STARS Support. Hover your mouse over the Voluntary Agencies hyperlink and a popup menu will appear which you can use to navigate through the website.

The Voluntary Agencies menu contains two sub menus: Online Applications and Tutorials and Documentation.

Under the Online Applications menu, you will find links to the STARS Registration program and Voluntary Training Calendar.

Under the Tutorials and Documentation menu, you will find a link to the STARS Tutorials, Voluntary Quick Start Guide, Voluntary STARS Glossary, and Voluntary Training Calendar Guide.

Adobe Reader

Adobe Reader is required in order to view reports. If your machine is not already running Adobe Reader, you can obtain the program at Adobe's website: http://www.adobe.com.

Obtaining Technical Support

The best way to obtain STARS technical support is via e-mail to starssupport@bsc-cdhs.org. Please be sure to include a detailed description of the problem or question. Technical staff at CDHS will research your problem and e-mail back a solution, or if necessary, will contact you via phone. If the nature of your problem requires immediate assistance, please call (800) 413-3210. An online tutorial has also been developed to help guide you through the registration process. Instructions for running the tutorial are included in sections I and II.

Data Maintenance

Staff must be entered into the STARS database before they can be registered for state-sponsored training. In addition, existing data, such as job titles and job units must be entered by each agency into the system:

- Agency Maintenance: Contains address and primary contact information
- Job Title Maintenance and Job Unit Maintenance: Enables users to define job titles and job units that are assigned to staff records
- Personnel Maintenance: Allows users to enter personnel information, which includes, but is not limited, to the following: name, active status, job title, job unit, job type, date hired, and functional area

STARS permits users to edit personnel records as needed; e.g. – name change, status change (active to inactive), termination of employment, job change, etc.

Reports

The Reports menu option contains several reports, including the Trainee Training History.

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Running the STARS Web-Based Program for Voluntary Agencies

I. Open STARS for Voluntary Agencies

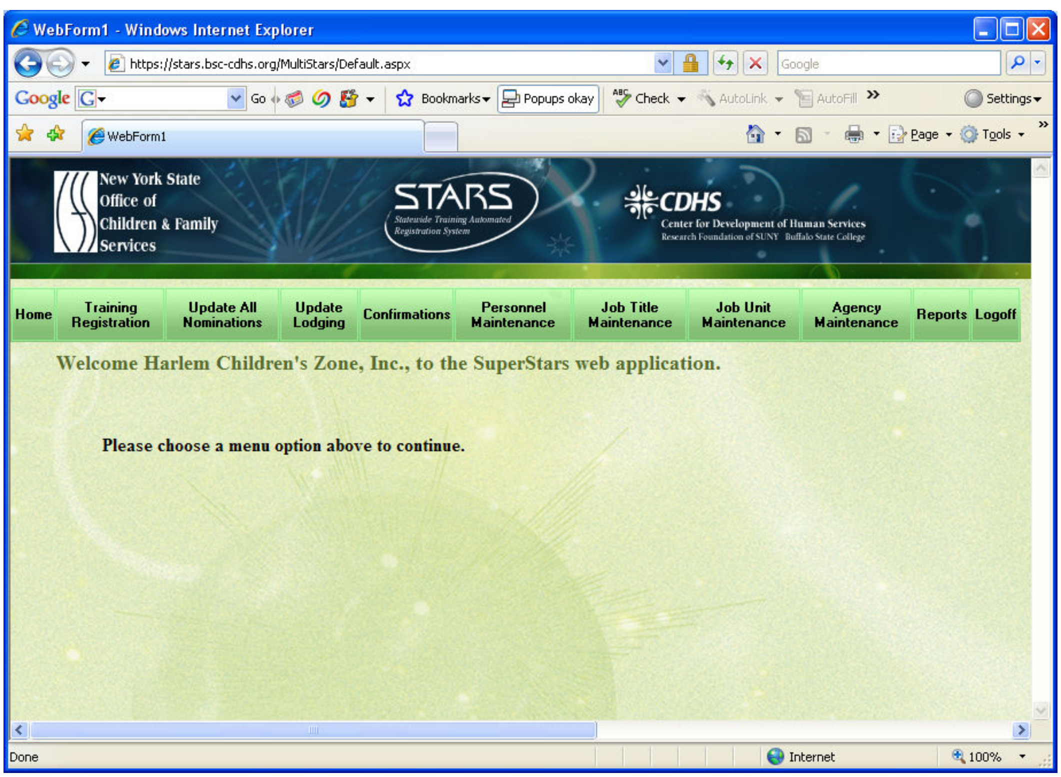
1. Open your Internet browser (Internet Explorer).
2. In the address line, type: http://stars.bsc-cdhs.org/ Press the Enter key.
3. You are now in the STARS web site. Select **Voluntary Agencies, Online Applications**, **STARS Registration**. The STARS login screen appears.

II. Run Tutorial (recommended for first-time users)

1. Make sure that speakers or headphones are connected to the PC.
2. In the STARS login screen, click the hyperlink that is located on the right side of the login fields and labeled as follows: Please click here to run the tutorial.
3. Select the first topic. The tutorial will automatically load and play.
4. Close the window when finished viewing the tutorial.
5. Select the next topic and repeat the last step until you have completed viewing all tutorials.
6. Click the **Back** button in your browser to return to the STARS login screen.

III. Login

1. In the STARS login screen, enter the STARS ID and Password assigned to your agency, and click the **Login** button.
2. You will be logged into the program. The Main Menu is displayed in light green across the top of the page.



IV. Updating Agency Information

The **Agency Maintenance** menu option is used to view and update information about your agency, such as its address and contact information.

1. In the STARS Main Menu, select the **Agency Maintenance** menu from the tabs across the top of the page.
2. The Choose Agency to Edit drop-down field appears.
   - If you are managing multiple agencies, choose the agency you want to edit by using the drop-down and then click the **Submit** button.
   - If you are managing only one agency, just click the **Submit** button.
3. Make changes to the agency information as necessary. For example, if the office moves to a new address, update the address information in STARS. This will ensure that information, such as pre-reading material, ships to the correct location. Please note: The Primary Contact field is used to designate the Training Coordinator, or person responsible for receiving email training announcements and confirmation memos. This person must have a valid email address entered in the STARS personnel profile.
4. When you have finished updating agency information, click the **Submit** button. If you don't wish to save any changes you made, click the **Cancel** button.

V. Review Your Agency Job Titles

The **Job Title Maintenance** menu option is used to set up and maintain a listing of user-defined job titles to be assigned to staff. A job title in STARS is defined as the name of a person's employment position, for example, a caseworker. A person's job title must be part of the job title listing before he or she can be added to the STARS database.

1. In the STARS Main Menu, select the **Job Title Maintenance** menu from the tabs across the top of the page.
2. The Choose Agency to Edit drop-down field appears with the job title grid below. If you are managing multiple agencies, choose the agency for which you want to review job titles by using the drop-down.
3. Verify whether all job titles are included in the job title listing, which is sorted alphabetically.
   - If a job title is not listed, click the **Add** button, enter the title and click the **Save** button.
   - If a title is incorrect or misspelled, select the title, click the **Edit** button**,** make the necessary change and click the **Save** button.
   - To delete a job title, select it, click the **Delete** button and then the **OK** button to confirm. Please note: The **Delete** option is to be used only if a title was added in error. If the title is assigned to an employee, the record cannot be deleted.

VI. Review Your Agency Job Units

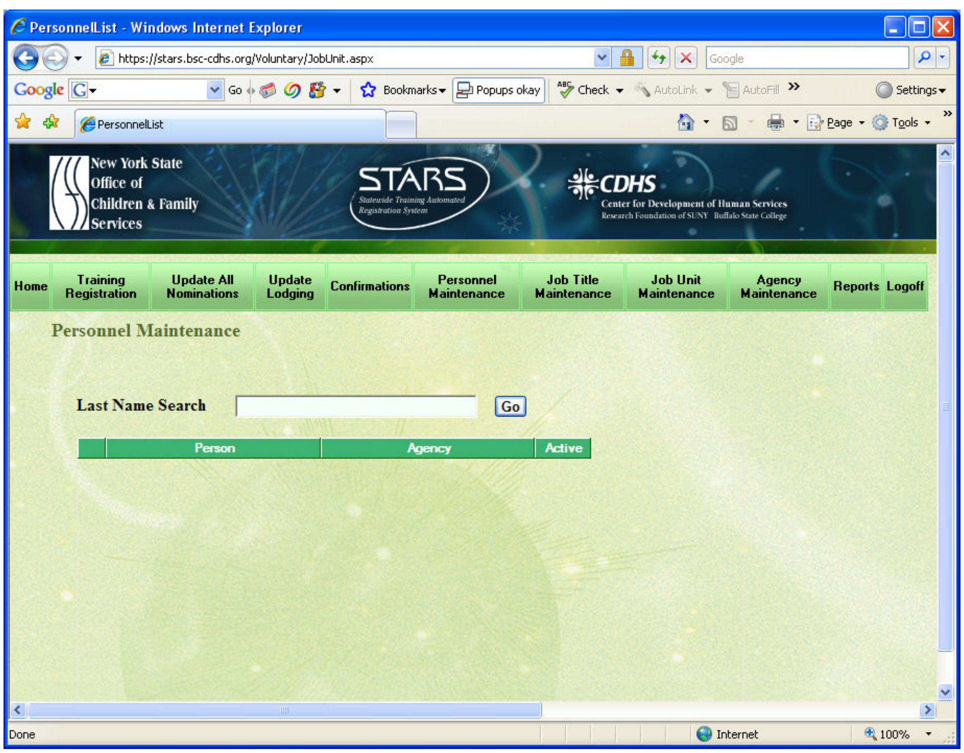
The **Job Unit Maintenance** menu option is used to set up and maintain a listing of user-defined job units to be assigned to staff. A job unit in STARS is defined as the organizational component to which people are assigned, for example, a CPS Unit. A person's job unit must be part of the job unit listing before he or she can be added to the STARS database.

1. In the STARS Main Menu, select the **Job Unit Maintenance** menu from the tabs across the top of the page.
2. The Choose Agency to Edit drop-down field appears with the job unit grid below. If you are managing multiple agencies, choose the agency for which you want to review job units by using the drop-down.
3. Verify whether all job units are included in the job unit listing, which is sorted alphabetically.
    - If a job unit is not listed, click the **Add** button, enter the unit and click the **Save** button.
    - If a unit is incorrect or misspelled, select the unit, click the **Edit** button**,** make the necessary change and click the **Save** button.
    - To delete a job unit, select it, click the **Delete** button and then **OK** to confirm. Please note: The **Delete** option is to be used only if a unit was added in error. If the unit is assigned to an employee, the record cannot be deleted.

VII. Review Your Personnel

The **Personnel Maintenance** menu option is used to set up and maintain a listing of staff. A person must be part of the personnel listing in STARS before he or she can be nominated for State training.

1. In the STARS Main Menu, select the **Personnel Maintenance** menu from the tabs across the top of the page.



2. Verify whether a staff member is part of the personnel listing. In the Last Name Search field, enter at least the first two letters of the person's last name and click the **Go** button. If matching personnel records are found, the grid will fill with staff whose last name begins with the letters you entered.
    - If the name is not listed, click the **Add** button. The Choose Agency for this person drop-down field appears.
        - ➢ If you are managing multiple agencies, choose the agency for which you want to add the person by using the drop-down and then click the **Submit** button.
        - ➢ If you are managing only one agency, just click the **Submit** button.

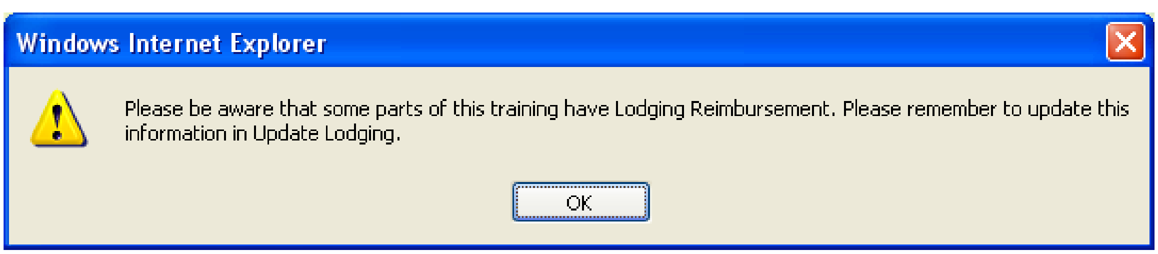
      The personnel form appears. Red asterisks indicate required fields. Fill in the form, making sure to use the drop-down fields where applicable, and then click the **Submit** button.
    - If the name is found, highlight it and click the **Edit** button. The personnel form appears filled in. Review the information for accuracy and make corrections as needed. For example, if the person no longer works for the agency, select the status of In-Active, select the Job Change reason and select the Job Change Date. When all corrections are complete, click the **Submit** button.
    - If you are managing multiple agencies, and wish to transfer an existing personnel record to another agency/location, click the **Transfer** button, select the agency from the drop-down and click the **Submit** button.
    - To delete a name, select the name, click **Delete** and then **OK** to confirm. Please note: The **Delete** option is to be used only if a person was added in error. If the person is assigned to training, the record cannot be deleted.

VIII. Registering Participants for State Sponsored Training

The **Training Registration** menu option is used to nominate staff for State-sponsored training that is Open for Nomination.

1. In the STARS Main Menu, select the **Training Registration** menu from the tabs across the top of the page. Filters appear which are used to narrow the search results.
2. Apply the filters.
    - The default From and To start date range is from today's date to one month ahead. Using the drop-down calendars, you may adjust the start date range. Only trainings that have a start date between the dates you specify will be filtered.
    - All Providers are selected by default. Using the Provider drop-down field, you may select the training provider that is offering the training for which you want to nominate staff.
    - All Content is selected by default. If you know the course content of the training for which you want to nominate staff, you may select it using the Course Content drop-down field.

   - All Training Types are selected by default. Using the Training Type drop-down field, you may select the type of training for which you want to nominate staff.
   - The region in which your agency resides is selected by default. If you wish to view training in a neighboring region, click inside the appropriate check box.
3. Click the **List Trainings** button. Trainings are sorted by start date and then training title. **Note**: You can apply a sort to any of the columns inside the grid by clicking the column heading.
4. Select the training title for which you want to register staff by clicking the green box to the left of the training title.
   - If you wish to see the training announcement, click the **Announcement** button. The training announcement appears in a new window. After viewing this announcement, close it by clicking the X in the upper right corner. The Training Registration screen returns.
5. Click the **Register Trainees** button. Note: If training is multi-part, a message will indicate all parts for which the nominee will be registered. Also, if your agency is a group agency and one or more agencies in your group do not meet the target population criteria for training, a message will indicate which agencies can register staff.
6. Enter at least the first two letters of the person's last name and then click the **Search** button. The grid will fill with staff whose last name begins with the letters you entered. **Note**: Leaving the search field blank returns the names of all active staff.
7. Click the **Register** check box in the row which contains the name of the person you want to register. If information, such as the supervisor name and number, is requested by the provider, double-click inside the Notes field and type in the requested information.
8. Click the **Continue Registering** button if you want to continue registering staff and repeat the last two steps. When you are finished selecting names, click the **Finished Registering** button.
9. If the training offers lodging, a message will remind you to update the lodging information via the Update Lodging menu option:



IX. Updating Nominations

The **Update All Nominations** menu option is used to cancel a nomination, update trainee notes, adjust priority ranking, and make meal and/or workshop selections. Once the training registration deadline date has passed, it will become necessary to call the training provider in order to make these updates.

1. In the STARS Main Menu, select the **Update All Nominations** menu from the tabs across the top of the page.
2. Select the training title for which you want to update nominations by clicking the green box to the left of the Training Title.
3. Click the **Select Training** button.
    - To cancel a nomination, double-click the trainee name. This will change the trainee status from *Nominated* to *User Cancelled* (and vice versa).
    - To update trainee notes:
        a. Click the **Notes** field in the row which contains the trainee name.
        b. Enter the notes.
        c. Click the **Update** button.
    - To adjust priority ranking:
        a. Click the **Priority** field in the row which contains the trainee name.
        b. Using the drop-down, select the priority number.
        c. Click the **Update** button.
    - To make meal selections:
        a. Select the trainee by clicking the trainee name.
        b. Click the **Meals** button.
        c. Select the day using the Meal Day drop-down and select the meal(s) using the corresponding drop-down(s).
        d. Repeat the last step for all training days. When finished, click the **Save** button. **Note**: Meal options are only available when the training provider offers them as part of the event. For example, a conference may include meal options.
        e. Click the **Back** button to continue making meal selections for other nominees.
    - To make workshop selections:
        a. Select the trainee by clicking the trainee name.
        b. Click the **Workshops** button.
        c. Select the session using the Session drop-down and select the workshop(s) using the corresponding drop-down(s).
        d. Repeat the last step for all sessions. Click the **Done** button when finished making selections. **Note**: Workshop selections are only available when the event is a conference.

X. Updating Lodging (if offered)

The **Update Lodging** menu option is used to update lodging information, such as the arrival date, room type, roommate, and special needs. Once the training registration deadline date has passed, it will become necessary to call the training provider in order to make these changes.

1. In the STARS Main Menu, select the **Update Lodging** menu from the tabs across the top of the page.
2. Select the training title for which you want to update lodging options by clicking the green box to the left of the training title.
3. Click the **Select Training** button.
4. Update lodging options as necessary:
   - To update the arrival date:
     Click the **Arrival Date** field next to the name of the person who is arriving the day before and type the new arrival date using the format of MM/DD/YYYY.
   - To update the room type:
     a. Click the **Room Type** field in the row which contains the trainee name.
     b. Using the drop-down, select one of the following options: Commuter, Single, Double, Triple, or Quadruple.
   - To update the roommate:
     a. Click the **Roommate** field in the row which contains the trainee name.
     b. Using the drop-down, select the roommate.
5. Click the **Save** button and then the **OK** button.

XI. Viewing Confirmation Memos

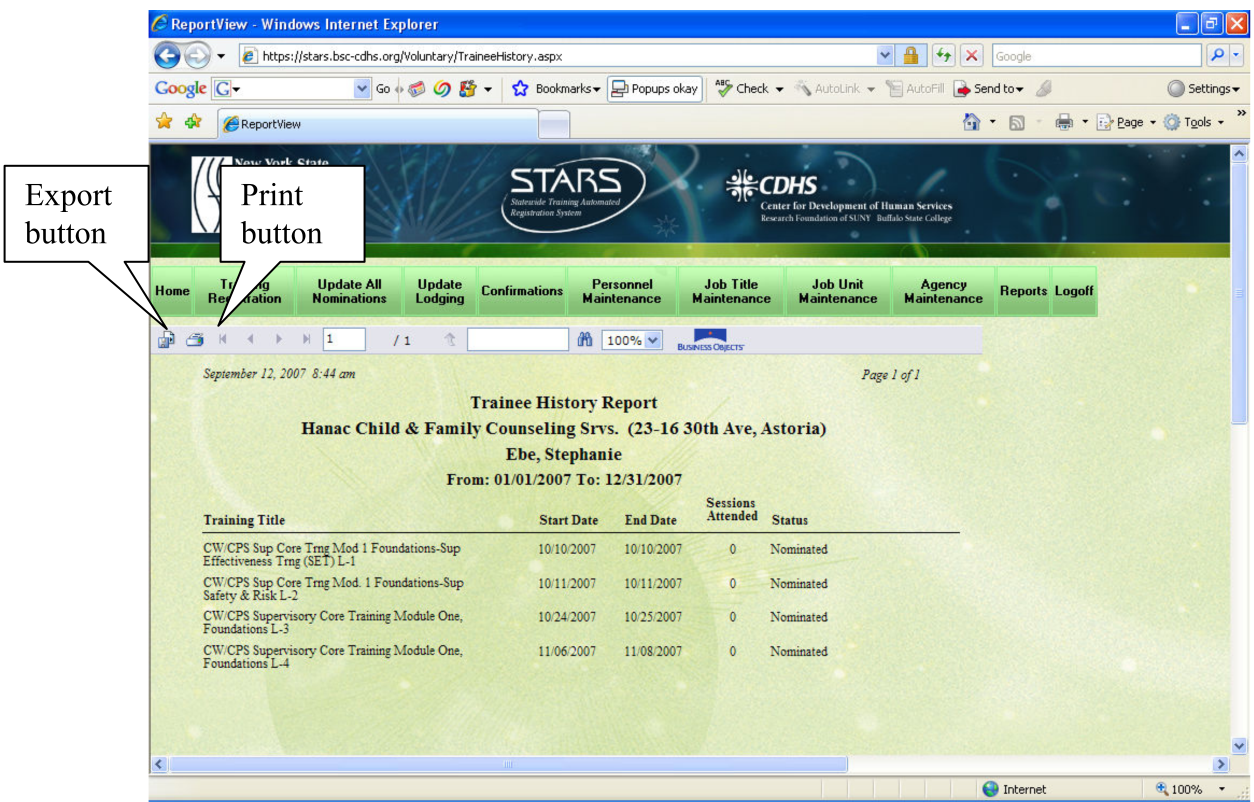
The **Confirmations** menu option is used primarily to view and print confirmation memos for trainings for which the registration deadline date has passed.

1. In the STARS Main Menu, select the **Confirmations** menu from the tabs across the top of the page.
2. Select the training for which you want to view confirmations by clicking the green box to the left of the training title.
3. Click the **Select Training** button. Names of nominees and their statuses display in the grid.
   - Click the **Preview Selected** button to view a memo for a selected individual nominee.
   - Click the **Preview All** button to view memos for all listed nominees.
   - Click the **SDC Memo** button to view the Staff Development Coordinator Memo listing the names of accepted and rejected nominees.
   - To view an attachment file, if one exists, click on the corresponding hyperlink.

XII. Running the Trainee Training History Report

The **Trainee Training History** report contains information about an individual employee and is sorted by the last name of the staff person, and the training start date. It includes the employee name, date range, training title, start date, end date, sessions attended, and trainee status.

1. In the STARS Main Menu, select the **Reports** menu from the tabs across the top of the page, and then select the **Trainee History** option from the drop-down. The Trainee History report design screen appears.
2. Apply the report filters:
   - The default From: and To: start date range is from January 1st to December 31st of the current year. You may adjust the start date range by typing in the From: and To: dates or by using the drop-down calendars. When selecting the year and month using the drop-down calendar, please be sure to click on the date inside the calendar. Note: Only trainings that have a start date between the specified From: and To: dates will be filtered.
   - If you are managing multiple agencies, choose the agency to which the employee whose history you want to obtain belongs. Use the drop-down to select the agency name from the list.
   - All Employees are selected by default. Use the drop-down to select an individual name from the list.
3. Click the **Generate Report** button.
4. The report will be displayed with a menu bar across the top of the screen.

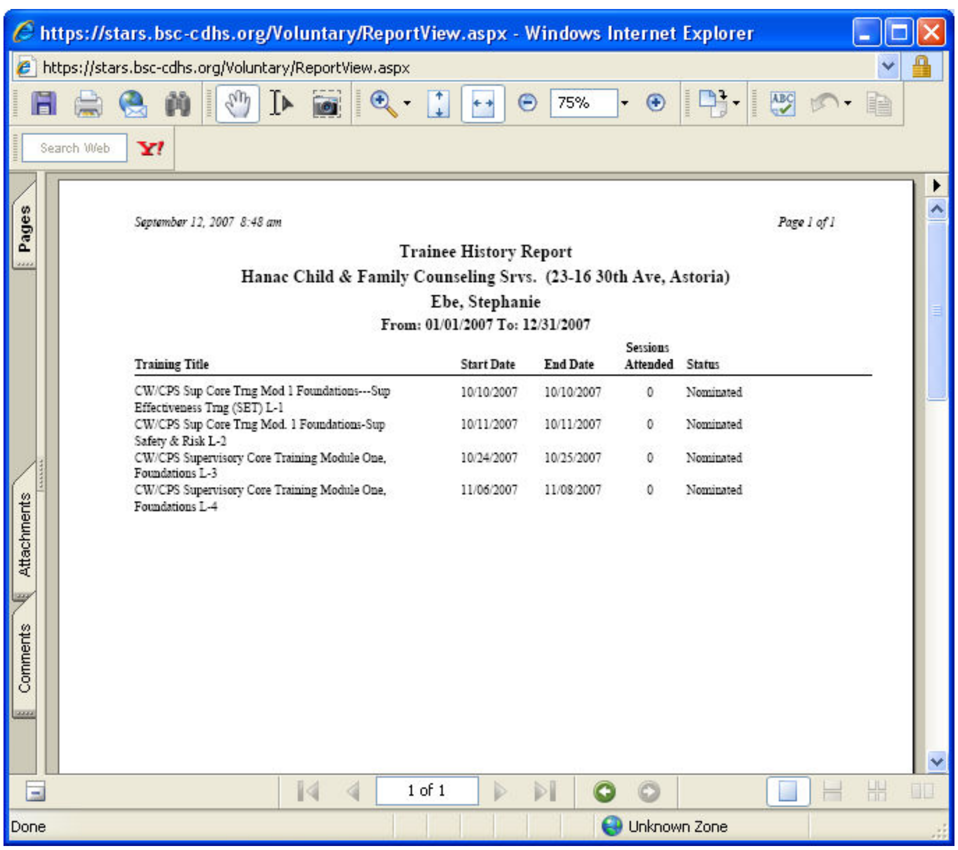


To export the report into another file format, such as Adobe PDF:

1. In the preview screen, click the Export button (leftmost button on grey toolbar). A pop-up window appears with export options.
2. Select the file format Adobe Acrobat (PDF) by using the File Format drop-down. To specify all pages, select the All radio button. To specify a page range, select the Pages radio button and type in the From: and To: page numbers.
3. Click the **OK** button. The report screen appears with the option for saving the report file.
4. Click the **Save** button. The Save a Copy screen appears.
5. Using the Save In drop-down, browse to the location for which yiou want to save the file, type the file name into the file name field and then click the **Save** button.
6. Close the Adobe Acrobat (PDF) file by clicking the X in the upper right corner.

To print the report:

1. Click the **Print** button. A screen appears with print options. To specify all pages, select the All radio button. To specify a page range, select the **Pages** radio button and type in the From: and To: page numbers. Then click the **OK** button. The report will open up in Adobe Reader or Report Viewer. If the report does not open up, it is most likely that pop-up blockers are running on the browser and you will need to disable them via the browser settings.

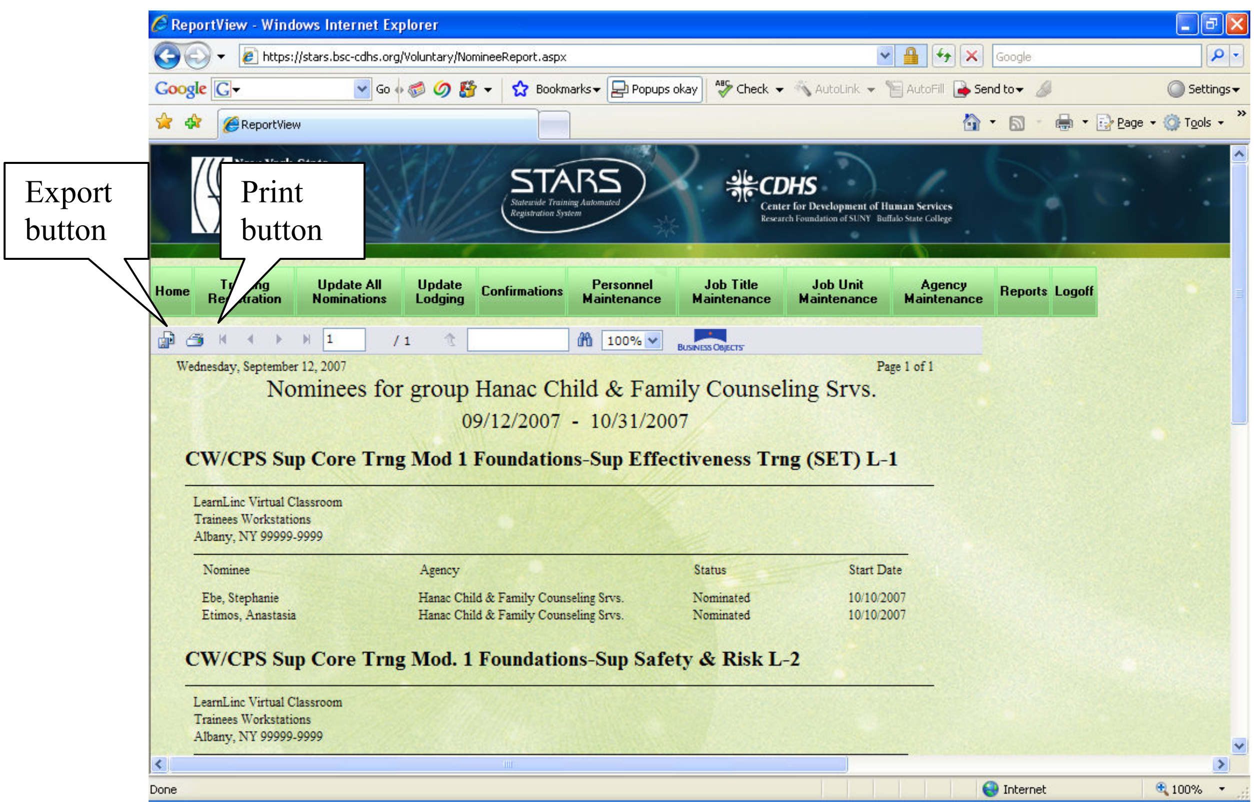


2. Click the **Print** button to send the report to your printer. When you are finished printing, close the report viewer screen by clicking the X in the upper right corner. You will return to the report screen.
3. In the report screen, navigational arrows appear to the left of the current page number. The leftmost arrow takes you to the first page. The rightmost arrow takes you to the last page. The inside arrows take you to previous and next pages.
4. The Find text box button is used to forward search on a term within the report. Enter the characters into the text box and click on the binoculars located on the right side of the box. The closest match will be highlighted in the report.
5. To change the magnification of the report for viewing, use the drop-down to select the percentage.

XIII. Running the Nominee Report

The **Nominee** report contains information about trainings for which staff is nominated and is sorted by the training start date and then by the last name of the nominee. It includes the training title, location, nominee name and agency, trainee status, and start date.

1. In the STARS Main Menu, select the **Reports** menu from the tabs across the top of the page, and then select the **Nominee** option from the drop-down. The Nominee report design screen appears.
2. Apply the report filters:
   - The default From: and To: start date range is from the current date to two weeks ahead. You may adjust the start date range by typing in the From: and To: dates or by using the drop-down calendars. When selecting the year and month using the drop-down calendar, please be sure to click on the date inside the calendar. Note: Only trainings that have a start date between the specified From: and To: dates will be filtered.
   - If you are managing multiple agencies, choose the agency for which you want to view nominees. Click the drop-down arrow and select the agency name from the list.
3. Click the **Generate Report** button.
4. The report will be displayed with a menu bar across the top of the screen.



To export the report into another file format, such as Adobe PDF:

1. In the preview screen, click the Export button (leftmost button on grey toolbar). A pop-up window appears with export options.
2. Select the file format Adobe Acrobat (PDF) by using the File Format drop-down. To specify all pages, select the All radio button. To specify a page range, select the Pages radio button and type in the From: and To: page numbers.
3. Click the **OK** button. The report screen appears with the option for saving the report file.
4. Click the **Save** button. The Save a Copy screen appears.
5. Using the Save In drop-down, browse to the location for which yiou want to save the file, type the file name into the file name field and then click the **Save** button.
6. Close the Adobe Acrobat (PDF) file by clicking the X in the upper right corner.

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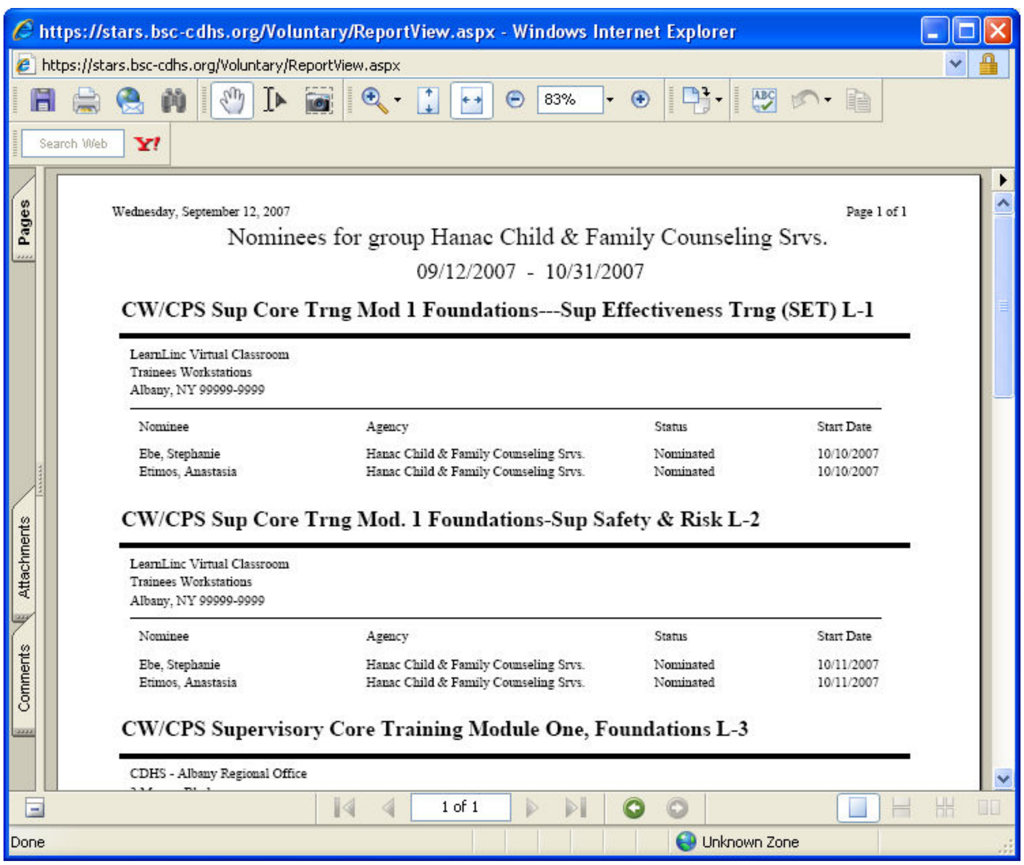

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5. To change the magnification of the report for viewing, use the drop-down to select the percentage.

IV. Logoff

1. In the STARS Main Menu, click **Logoff** from the tabs across the top of the page.
2. Close your browser (Internet Explorer).