Outcomes Star Online Integration Pilot

Test Data Guide

1 Overview

This document is a guide for organisations taking part in the Integration Pilot.

The APIs can be tested using SWAGGER to POST data to a Star Online account and GET data from that account. In order to test these APIs, a 'test' Star Online account will need to be created in the Sandbox environment.

Please see the pilot information guidance document for more details on the Integration pilot.

2 Creating your test Star Online account

The Star Online Helpdesk will create your test Star Online account in the Sandbox site. In order to this, the Helpdesk will need the following information:

Account Lead - name and email address

- The test account will need an Account Lead.
- Account Lead's are responsible for setting up and administering a Star Online account.
- For the purpose of this pilot, a new generic email can be set up for the Account Lead role (e.g AccountLead1@gmail.com)
- The testing organisation will need access to the Account Lead email address.

Integration Lead – name and email address

- An Integration Lead will need to be added to the test account.
- This user account is used to create the API key
- Only the Integration Lead is able create the API key for the account
- The testing organisation will need access to the Integration Lead email address.

3 Adding test data to your Star Online account

In order to test the API end points effectively, the test account will need to be set up and test data created. This data can be done using the Account Lead user account. *Please ensure that only 'test' data is created, and no real Service User information is used.* The following list outlines the minimum amount of data that should be created.

- **Services – 2**
- **Practitioners – 2 should be created (1 linked to each service)**
- **Service users – 2 should be created (1 linked to each service)**
- **Engagements – 2 should be created (1 in each service)**
- **Stars – 2 should be created (1 in each engagement)**
- **Actions – 2 should be created (1 in each engagement)**

Example of a test account:

Service 1

Practitioner A linked

Service User A created with 1 engagement and 1 Star submitted in engagement and 1 action created.

Service 2

Practitioner B linked

Service User B created with 1 engagement and 1 Star submitted in engagement and 1 action created.

4 Support using your test account

The appendix includes Help content to support you to set-up your test account and add test data.

If you need any further support using your test Star Online account in the Sandbox site, please contact the Star Online Helpdesk, support@staronline.org.uk, clearly stating that you are part of the Integration pilot.

5 Appendix 1 – Creating services

From the My Account page, look in the Account menu on the left-hand side and go to Account Details.

Find the Services section of the Account Details page and click on the orange Add Service button.

Enter a name for the service, the country and timezone, the type of service and the duration of support typically provided by the service.

Please note: the timezone field here does not impact on how the system records times and dates.

Select Create.

You will then see the Service Details page for this service.

Linking Star versions to the service (required)

From the Service Details page, look in the menu on the left hand side and go to Star Versions.

Click on the orange Add button on the right hand side of the page.

You will see a list of Star versions available to this service. Select the Star version that will be used by this service.

Click on the Add to service button.

You will then see the Star version listed under Star Versions Used by Service.

Configuring options for the service (optional)

Here you can enable/disable the following options:

- Recording additional information about service user
- Service User Consent: *Enables an additional section for recording consent and uploading a consent document, when creating a service user.*
- Contact Details: *Enables an additional section for recording contact details for a service user.*

Enable additional features

- Action Planning: *Allows the ability to add multiple action plans against each Star episode.*
- Configure Practitioner Permissions: *Use this option to restrict what practitioners can see and edit within services that they are linked to.*

6 Appendix 2 - Adding practitioners

Users must be set up from within an existing Service.

From the My Account page, look in the Account menu on the left-hand side and go to Account Details.

Look at your Services list and click on the Service that the practitioner should be linked to.

In the Service Details page, scroll down to the Practitioners section.

Click on the orange Add User button.

Choose New User (as the user has not yet been set up with a login for Star Online - you would choose existing if they already have a login for your account and you wanted to link them to another service)

Enter the details for the practitioner – ensuring that their email address is unique to them, and that they can access the inbox for that email address.

Click on the green Create button.

You will then see the user appear in the Practitioner list for that Service.

Once you have set up a user, they will automatically be sent an email containing the information they need to log into your account. Please note, these emails will expire 1 week from the date they are sent - if the user has not logged in within 1 week, they will need to be sent a new activation link, which you can do from their listing on the Account Details page.

7 Appendix 3 – Creating Service Users and engagements.

Go to Records in the toolbar near the top of the page and click on the Add button.

This will take you to the Create Service User page.

The first thing you'll be asked to tell the system is which service is supporting the service user. You will see a list of services that you have been linked to as either a Practitioner or Manager. You can choose more than 1 service if the service user is being supported by more than 1 service.

You'll then be asked to enter information about this person.

Service User Id: *This is an optional field*. *Use this if you use other reference numbers for the service user within your organisation.*

Forename and Surname: *These fields are mandatory, so you must put information in here.*

Preferred Name (if different): *This is an optional field so you do not have to put information here.*

Date of birth: *This is a mandatory field, so you must put a date in here.*

Gender and ethnicity: *These are optional fields so you do not have to put information here.*

Contact details: *These are optional fields so you do not have to put information here.*

Depending on the settings applied by your Account Lead, you may be asked to enter an additional piece of information at this stage:

Service user consent: *if the service user or a representative of the service user has given their consent for their information to be stored on the Star Online. You can also upload a copy of the consent.*

You will then be asked if you want to start an **engagement** for the service user. You will need to have started an engagement with someone before you can add any completed Stars and actions to their record.

An engagement means a time period during which support is being provided to someone. By starting an engagement, you are telling the system when the service user started to be supported by the service.

To start an engagement, select Yes in the Create Engagement column for any relevant services and Stars.

Enter the date the engagement (the support) started.

Select the Lead Practitioner for this engagement from the drop down list.

Click on the green Save button to save this record.

8 Adding Stars and actions

Go to Records

Find the service user who the completed Star belongs to, by searching for their name or ID, or using the filters to find them in the presented list

Select their record

From the summary page, click on the ‘Enter Star from paper’ button

You’ll be presented with information about which service (or services), engagements and Star versions are linked to the person.

If the Star you want to enter is part of an existing engagement (ie, it is part of a period of support that has already been started), find the relevant engagement and click on the “Continue this engagement” button.

Enter Star information: *Enter the date the Star was completed*

Please note that the date the Star was completed cannot be:

- Before the engagement start date
- Before the completed date of a Star reading previously submitted for the service user
- The same as the completed date of an existing Star reading for the service user

Tell the system which approach was used to complete the Star: *Was this Star was completed collaboratively with the service user?*

- If yes, the system will ask you to specify which professional completed the Star collaboratively with the service user (this will be you as default, but you can specify another practitioner if you are entering the Star on their behalf)
- If no, the system will ask you to explain what alternative approach was used and why:

Click on the Next button.

Enter Star readings: *You’ll now see the Scales and Journey of Change for the relevant Star version.*

- Click on a reading for each Scale – you should see the empty circle turn into a tick.
- Enter your Notes for that Scale in the Notes box.
- Click on the green Next Area button or click directly onto the next Scale name to move to the next Scale.
- Continue adding all the readings for all Scales. You’ll see the readings appear next to the Scale name.

Once all readings are entered, click on the Next button.

Enter actions

To add a new action:

- Click on the green +New Action button on the right-hand side.
- Choose the Outcome Area that the action links to. The system will then display the relevant Journey of Change reading for that Scale.
- In the Goal(s) box, type in the overarching goal that the action supports and click the orange +Add button. You can add more than 1 goal.
- In the Action box, type in the details of the action.
- In the By Who box, specify if the action is for you or for the person being supported to achieve.
- In the By When box, enter the deadline for the action to be achieved

Click on the Save this action button or click on the Save and add another action button to open another action.

Click on the Next button.

Review and submit the completed Star

- You'll now see all the information you have entered for this Star presented on the screen.
- Check all the information carefully, as you cannot go back and change certain information once the Star has been submitted.
- When you are ready, click on the Submit Star button.
- The system will not let you submit the Star if mandatory information has not been entered. Scroll to the top of the screen and if there is any information missing, you will see a red exclamation mark next to the step where the information is missing.

Click on the Submit Star button.

Confirm that you want to submit the Star or cancel to go back and make further changes.

Once you have submitted the Star, you'll be presented with some options as to where you can go next.