SUDS Tip Sheet: Roster Client Report

(Found on the Roster's tab)

Overview

- The SUDS team added assessment and eligibility information to the Roster Client Report.
- The Roster Client Report button takes you to a report that lists all the clients on the roster with all of their assessment and service eligibility information.

When should I use the Roster Client Report button?

- The AAA Admin may find the Roster Client report useful to:
  - See which roster clients are not eligible for the roster's service.
  - Determine if any assessments need to be performed for any of the roster's clients.
- A provider may find the Roster Client report useful to:
  - See which clients are causing an eligibility error when entering units on a roster.

Where do I find the Roster Client Report button?

- The Roster Client Report button is on the top right-hand side of the Roster's page with the Units Created Today, Copy, and Edit buttons.
  - If you have a wide screen, you will see the Roster Client Report button next to the Units Created Today button.


  - If you have a compact screen, select the down arrow to the right of the Units Created Today button. The Roster Client Report will appear in the dropdown options.

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What does the Roster Client Report look like?

- The report is automatically filtered to show the clients on the roster whose page you were on. The list of clients will include active and inactive clients on the roster.
- The report will list the following new information for each client on the roster:
  - Most recent assessment dates and scores for each client.
  - Most recent NSIP, Frail, Performs Chores Without Help, Cognitive Impairment and Cognitive Impairment Level for each client.
  - The status of the service eligibility checkboxes for each client.
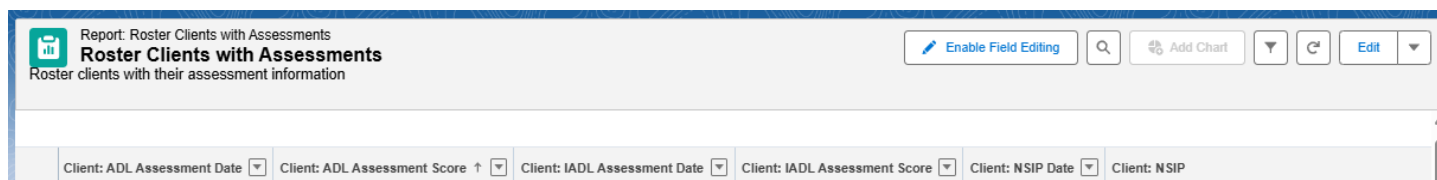
How can I make changes to the Roster Client Report

- Never edit the Roster Client report directly. The report is in the Public Folder, so all users can access it from the Roster Client Report button. This means any changes you make would make changes for all users.
- Always save a copy to your own Reports folder to make edits, following the instructions below.

How do I download a copy of the report?

From the Edit drop-down on the report, you can select Export to save a copy to Excel

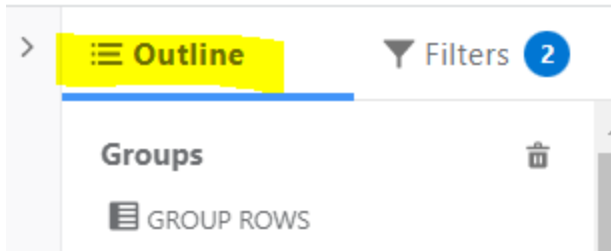## Adding information to the report:

You can add additional information or change what columns you see on the report

1. Open the report that you saved to your folder.
2. Select Edit (top right of your screen). This will open the Report Builder, allowing it to be edited.
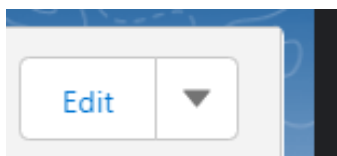
3. This will take you to the Outline screen, where you can change or add to the Group Rows, Group Columns, and Columns shown in the report.

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- More information on building a report and adding fields to the report can be found on the [Salesforce help page on how to Build a Report](#).

Cleaning up roster clients

You can use the Roster Client report to clean up the roster clients in SUDS.

- The AAA Admins can use the report to help them:
  - Identify clients for removal from rosters when they are no longer eligible for a roster's service.
  - Identify clients for removal from rosters when they become inactive due to passing away, moving to an LTC, or moving out of state.
  - Monitor providers to ensure they are keeping roster membership current.
- A provider can use the report to help them:
  - Identifying clients for removal from rosters when they are no longer eligible for your services.
  - Minimize the number of clients on your roster for easier viewing.
  - Stop potential errors due to inactive or ineligible clients when saving units on rosters.

One final reminder

You do not need to create a new Roster for each new class or new month of congregate meals. One roster is good for the length of a service. By using the same roster over time, you will save us a lot of work and memory behind the scenes in SUDS.

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