SUDS Guide: Working with List Views

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Overview

This guide will show SUDS users how to use, modify, and create list views to make navigation and finding records easier in SUDS.

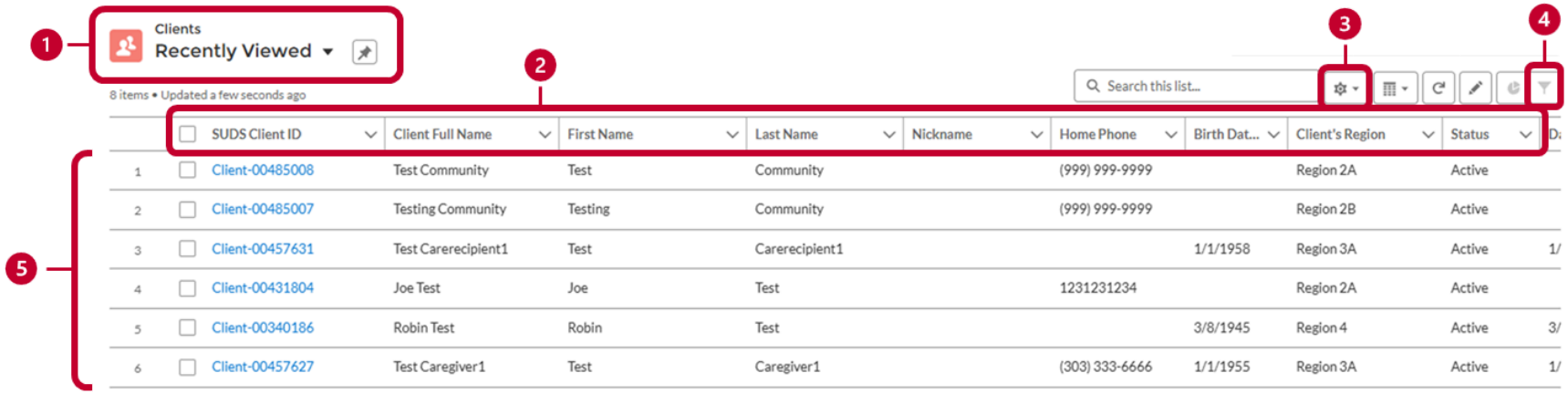
What is a List View?

List views are a customizable tool that displays a filtered list of records on a specific tab in SUDS, allowing users to quickly segment, organize, and manage data. A proper list view will save you valuable time by reducing the need for cumbersome searching in SUDS.

Where are List Views Located in SUDS?

You will find a list view when you click on any of the tabs on your navigation bar (except Enter Units).

Here is an example of a recently viewed list view for clients:



1. Name of current list view
2. Client fields
3. List view settings
4. List view filters
5. List view records

List View Types

There are three main List Views available in SUDS.

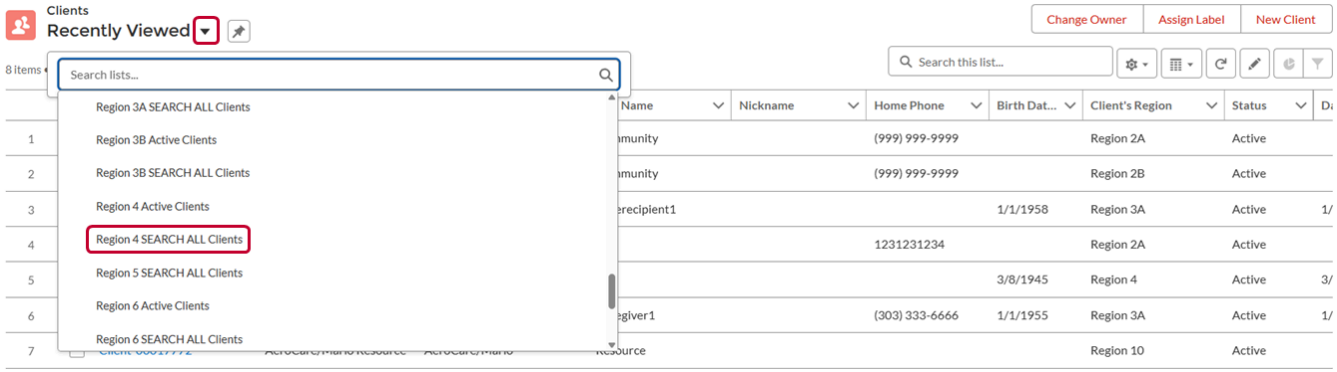
1. Default List Views: These are list views that come standard with our Salesforce system. The primary default list view is Recently Viewed. All list views in SUDS will default to Recently Viewed unless you select another list view.

2. Public List Views: These are list views created by the SUDS Data Team to help users navigate the system. Most of these list views display records by Region. They serve as a list view starting point that contains more records than Recently Viewed.
3. Custom List Views: These are list views created by SUDS users. You can create a custom list view to meet your needs. This can be saved and modified at any time and is not shared with other users.

There are other areas in SUDS where a list of records is displayed, like when you look at all the service units for a client. These screens cannot be customized by users.

How Do I Change My List View?

List views are part of a dropdown selection in SUDS, you simply need to make a different selection. You can select different list views as you need them, or if you find/create a list view that works well for you, you can pin it to make it your default list view.



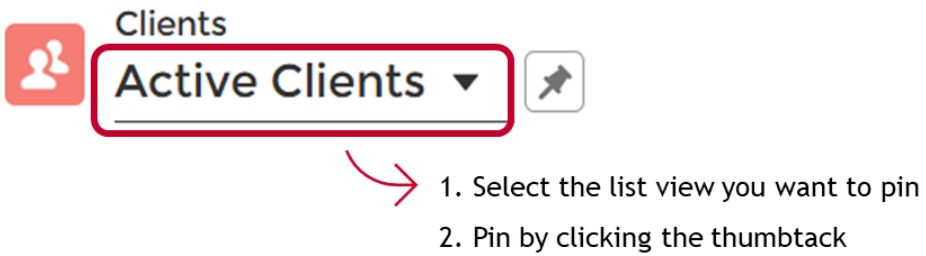
1. Click the ▼ to the right of the list view name.
2. Click on the list view name to select a different list.

Q. What is the difference between Region 4 Active Clients and Region 4 SEARCH ALL Clients?

A. SEARCH ALL Clients includes clients whose status is marked as Inactive or Hiatus.

Pinning a List View

When you find/create a list view that works well for you, you can pin it to make it your default list view.



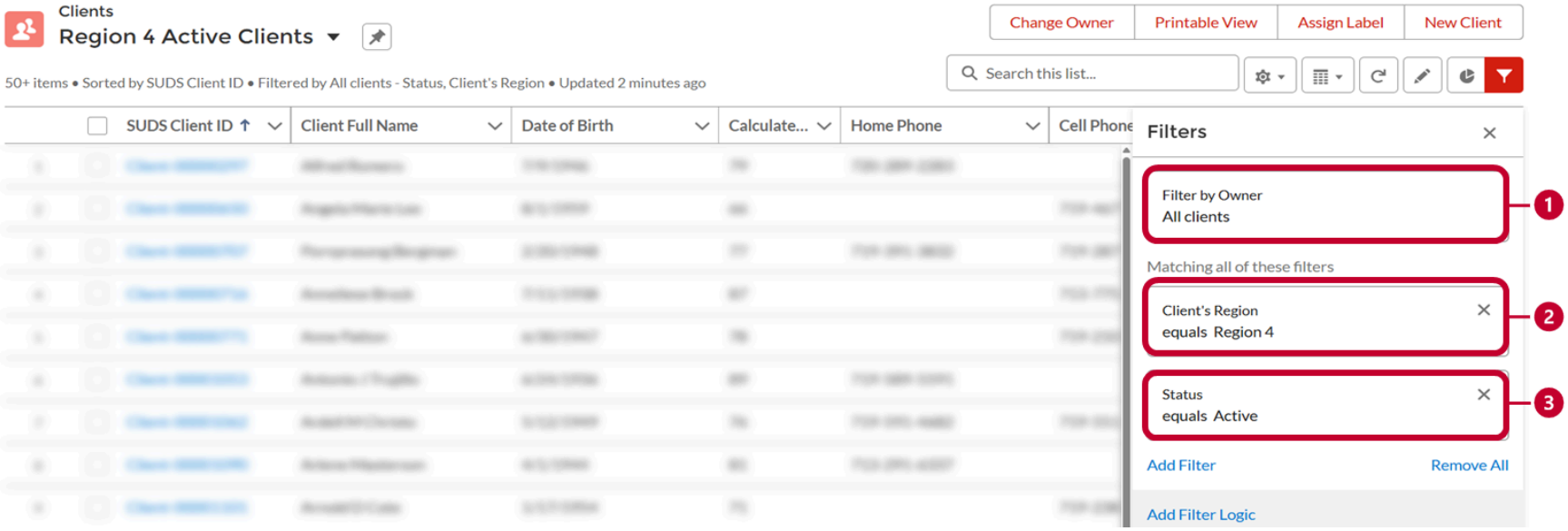
When the thumbtack is at an angle, the list is not pinned. When the thumb tack is vertical, the list is pinned. The pinned list becomes your default list view, and it will appear every time you log in to SUDS.

Understanding Client List Views

Let's look at a client list view in SUDS. Two important factors to remember:

1. A client list view can only display client data.
2. Filters control what information is included or excluded in a list view.

When using a new list view, reviewing the filters will let you know which records are included in the list view.

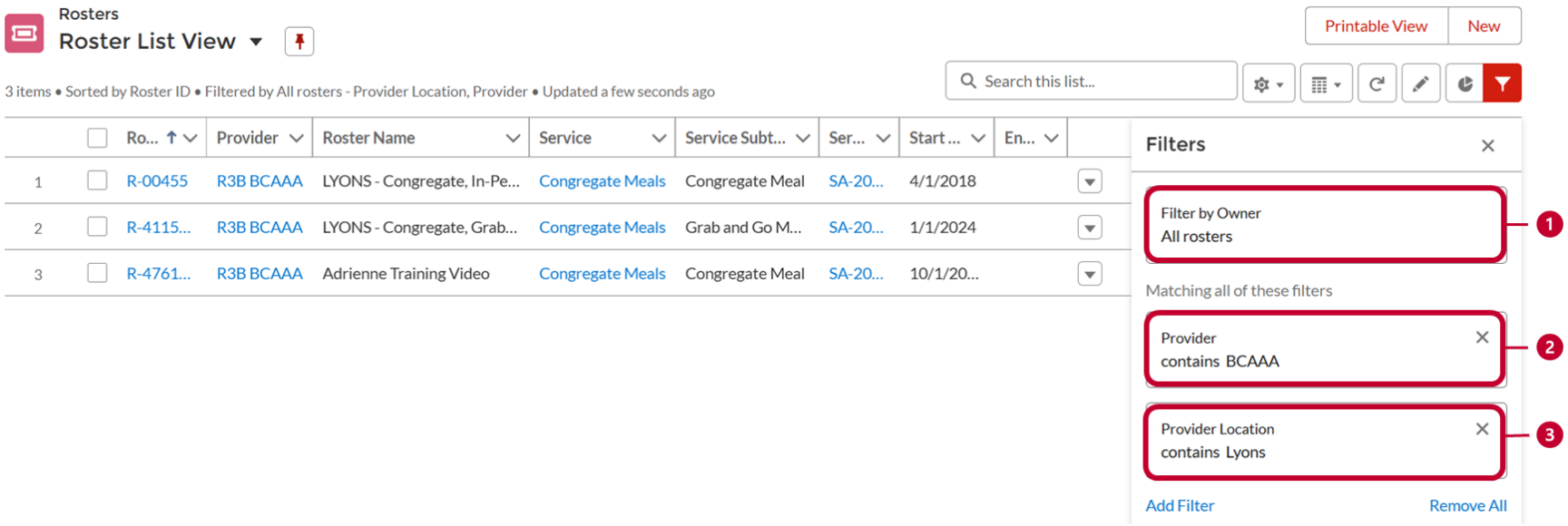


1. Filter by Owner: This is a default filter in SUDS. This filter should always be on All Clients.
2. Client's Region: To narrow down the results, clients are filtered by region. Now only clients who are in Region 4 will be displayed.
3. Status: To narrow the list even further, a filter has been added to select only Active clients. Clients with a status of inactive or hiatus will not be on the list.

No SUDS user "owns" a client. SUDS was built to be "client-centric," meaning anyone in SUDS can view a client's record. This allows for better coordination of care.

Understanding Roster List Views

Roster list views are less complicated than client list views since they tend to be organized around a provider, provider location, and service. Like the client list view, a roster list view can only display the information you would find on a roster record.

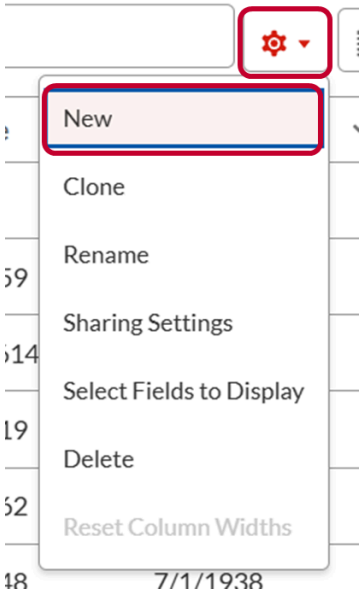


1. Filter by Owner: This is a default filter in SUDS. This filter should be set to All rosters.
2. Provider: Since rosters are tied to specific providers, using provider to filter makes a quick list view.
3. Provider Location: A great way to narrow the list even further. This piece is vital if you run congregate meal sites in a region with dozens of provider locations.

If you work with a AAA or provider where multiple services are offered at one location, adding filters for service can help narrow the list.

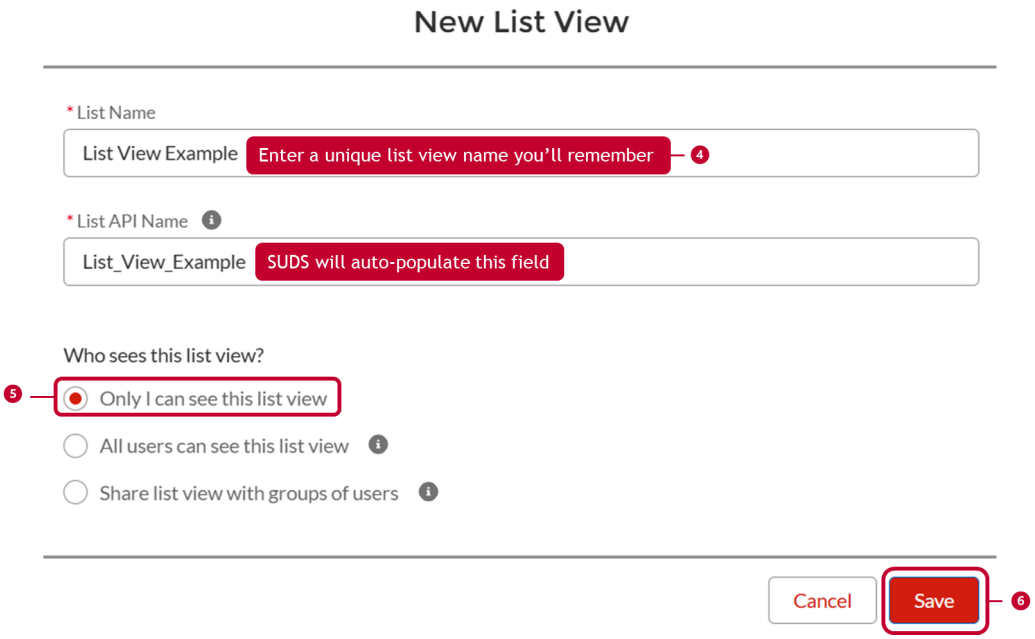
Creating a Custom List View: Clients

Let's say you really like the list view of Region 4's Active Clients, but you only want to look at clients who have received services in the last 3 months. We can add the field Last Date of Service to the list view fields and filters.



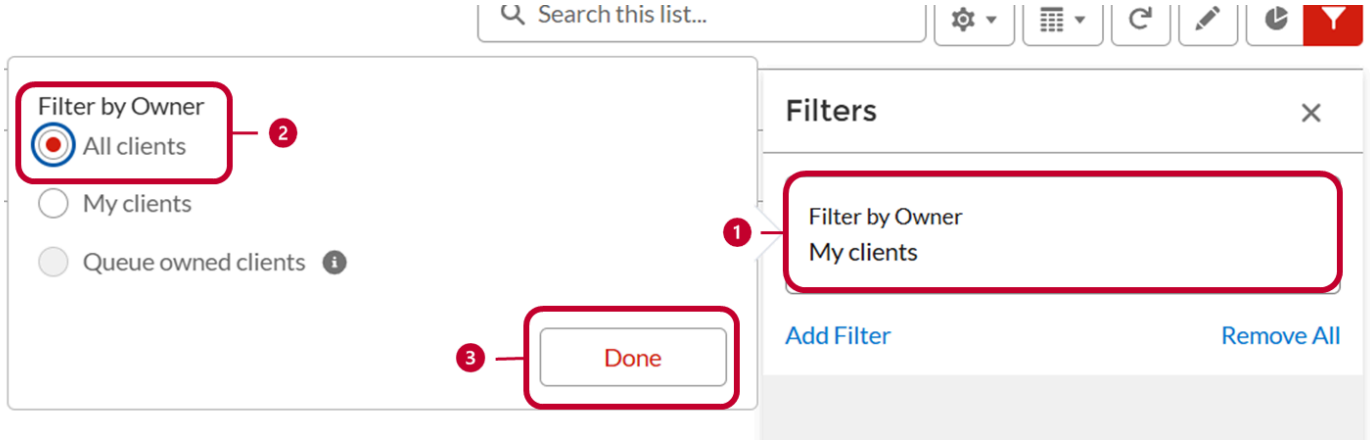
To create a new client list view:

1. Click ⚙
2. Click New
3. This will open a new window

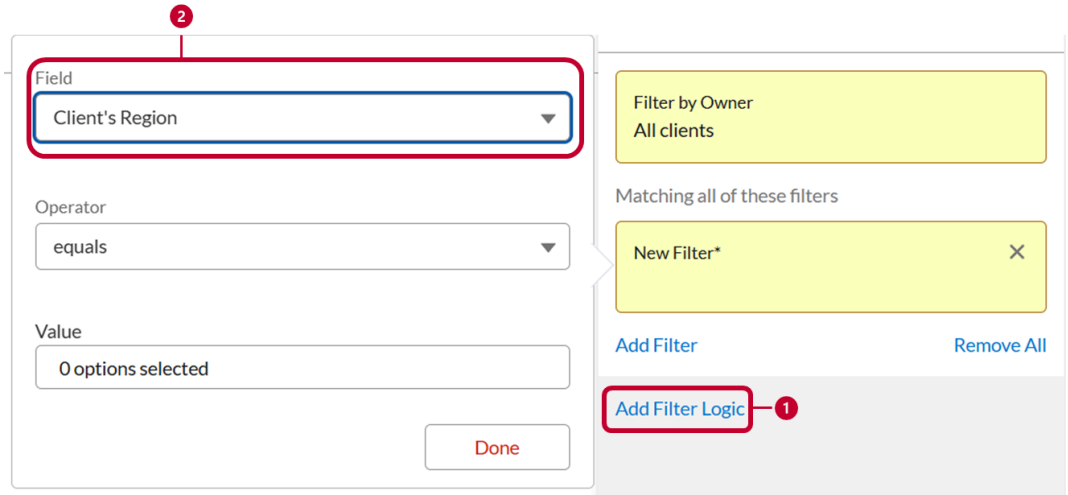


4. Create a list view name
5. Click "Only I can see this list view"
6. Click Save

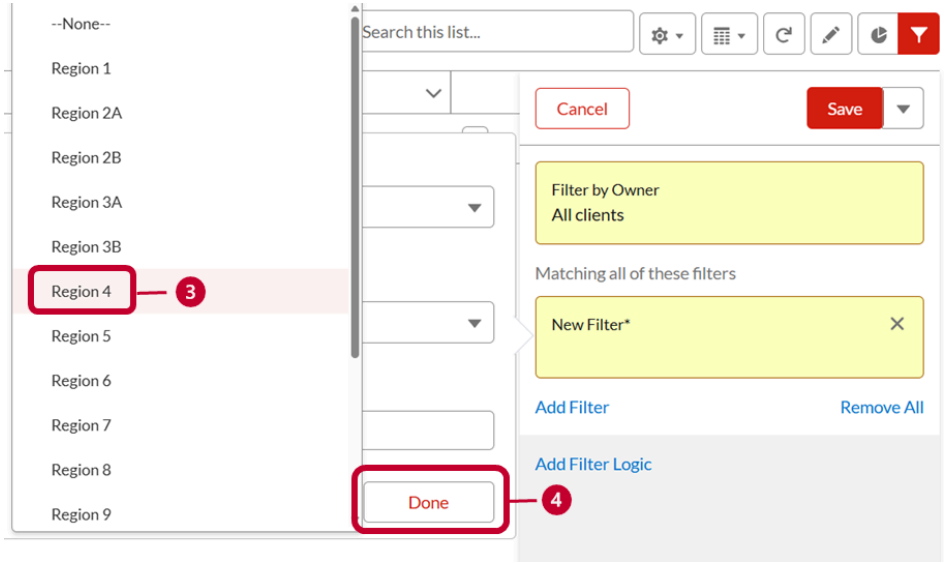
This is the result. At this point, we need to adjust the filters and add client fields. SUDS contains many default filters and Filter by Owner is one of these. Since users do not own clients, this filter needs to be changed.



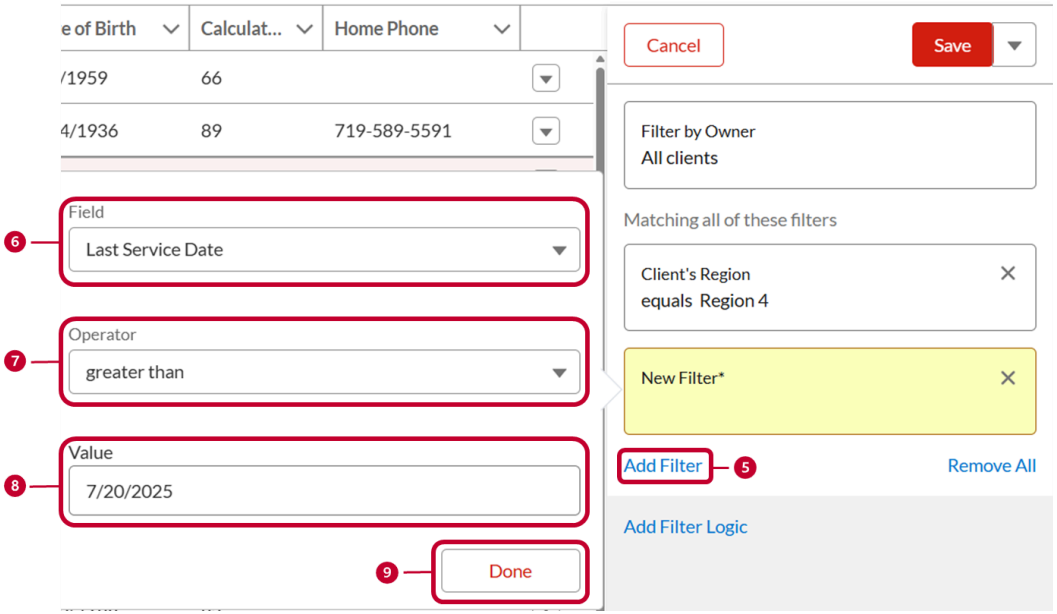
1. Click on Filter by Owner, this opens the box to the left
2. Select All clients
3. Click Done



1. Click Add Filter Logic
2. Select Client's Region from the drop-down list



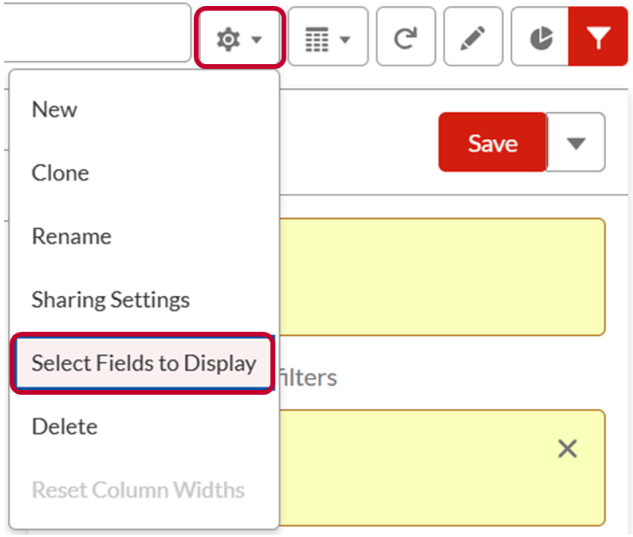
3. Select Region 4
4. Click Done

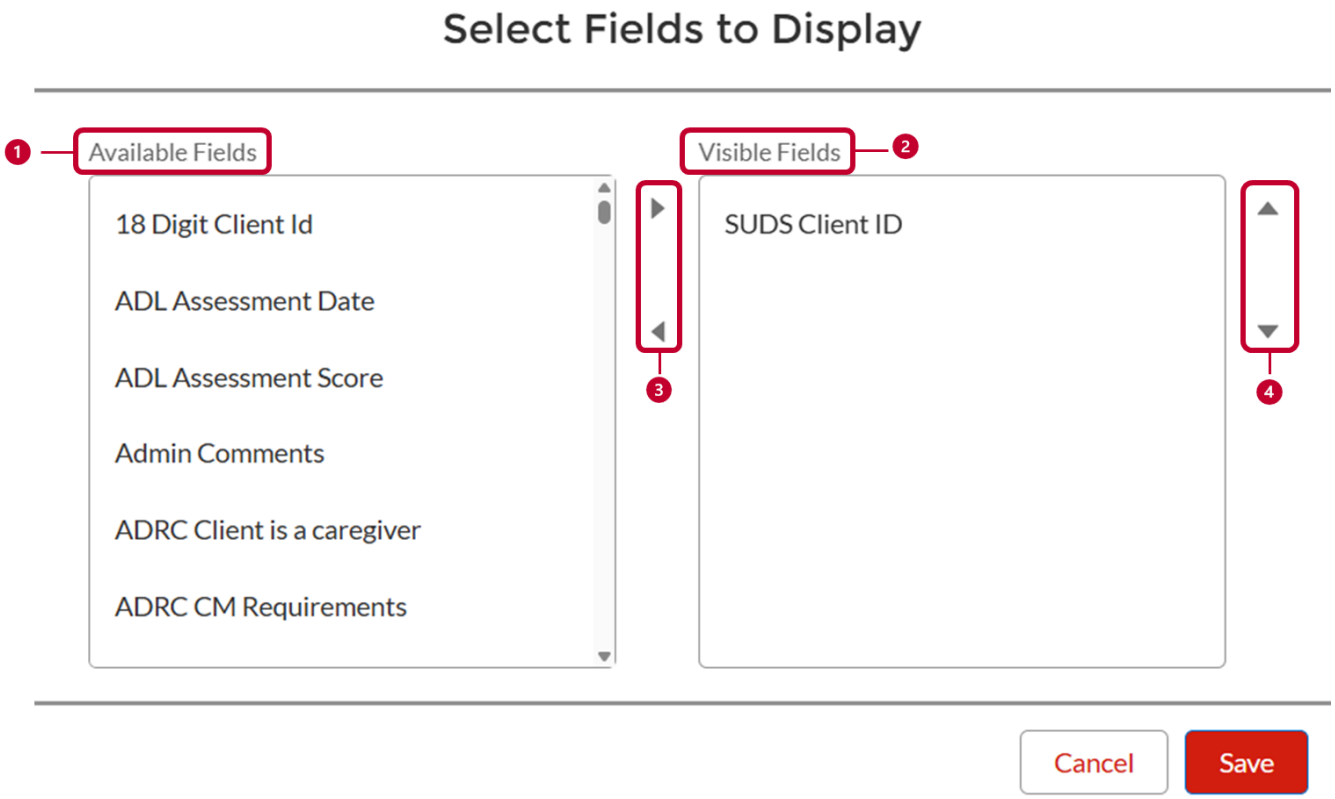


Let's add the second filter for Last Service Date

5. Click Add Filter
6. Select Last Service Date
7. Select Greater Than for the Operator
8. Enter the desired date. This will pull in clients whose Last Service Date is after 7/20/2025 or 3 months ago.
9. Click Done

Now it is time to add fields to our list view. This is the information you want readily available. Return to the list view cog and click on Select Fields to Display.

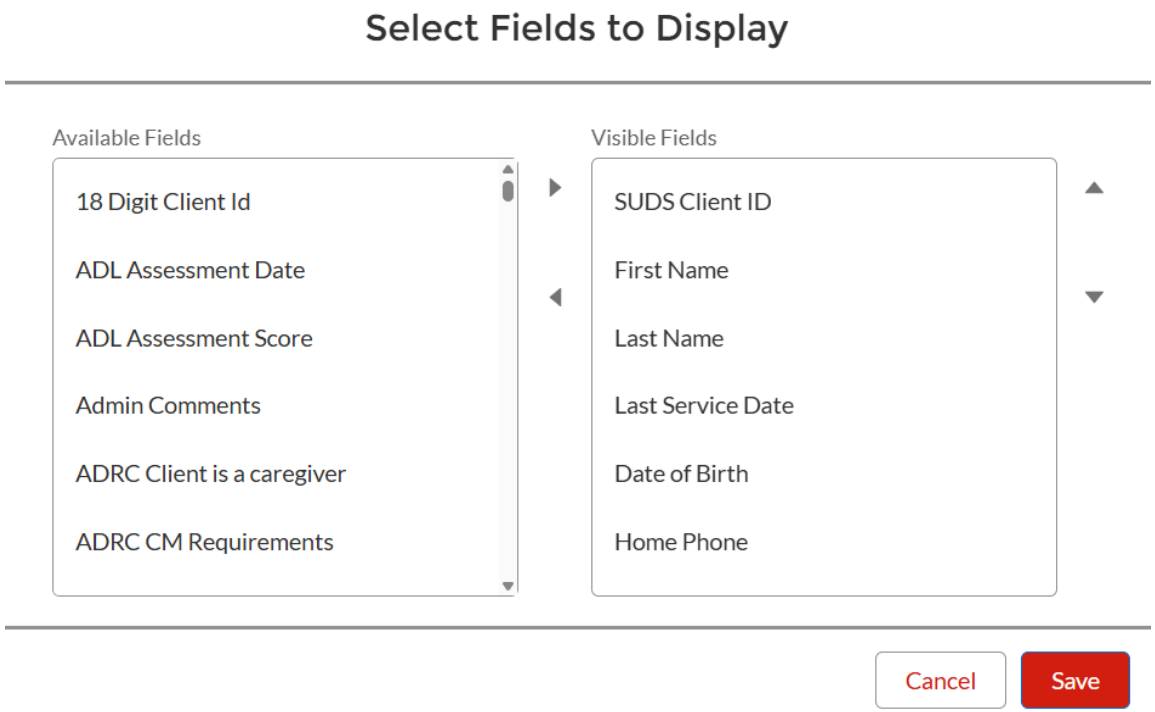




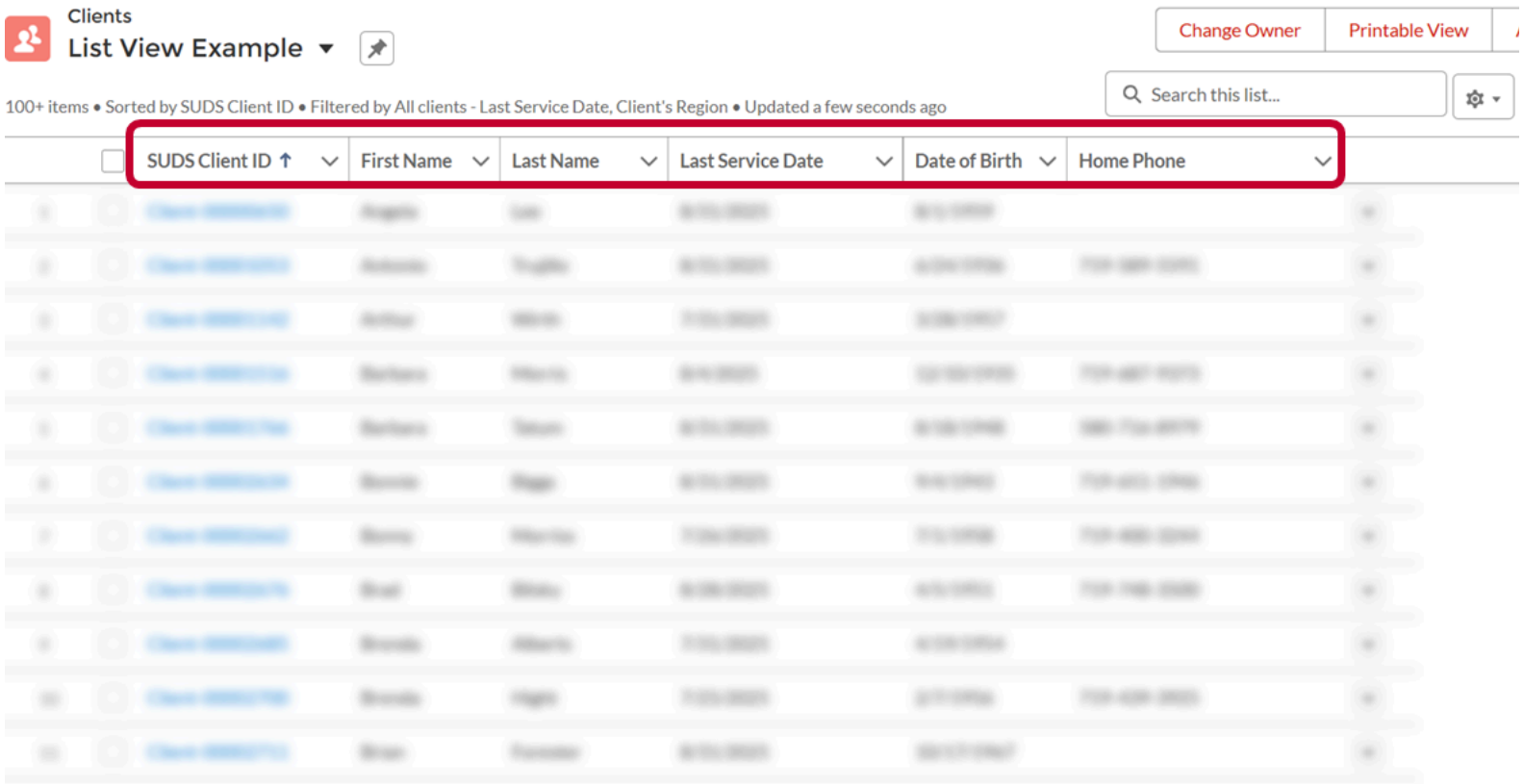
A new window will open to select fields.

1. These are the fields available to add to your list view. This will only contain fields found on the client record. The list is in alphabetical order.
2. These are the fields currently in your list view. All new list views default to only including the SUDS Client ID.
3. These arrows let you select and move fields between the two options. Select an Available Field and click the right caret to move that field to Visible Fields. This can also be done in reverse to remove Visible Fields.
4. Once you have selected a list of fields, you can reorder the fields by using these arrows. The order your fields are in here (top-down) will appear left-to-right on your list view.

This is how our completed Visible Fields box appears. Once you have finished selecting your fields, click Save.



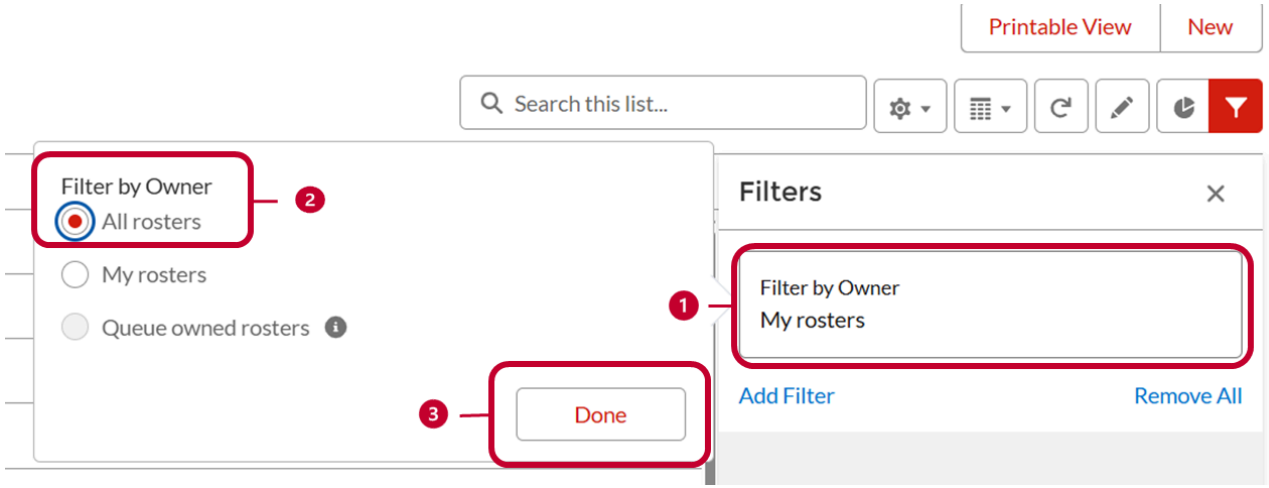
This is what the final list view looks like with the fields we selected at the top, in order.



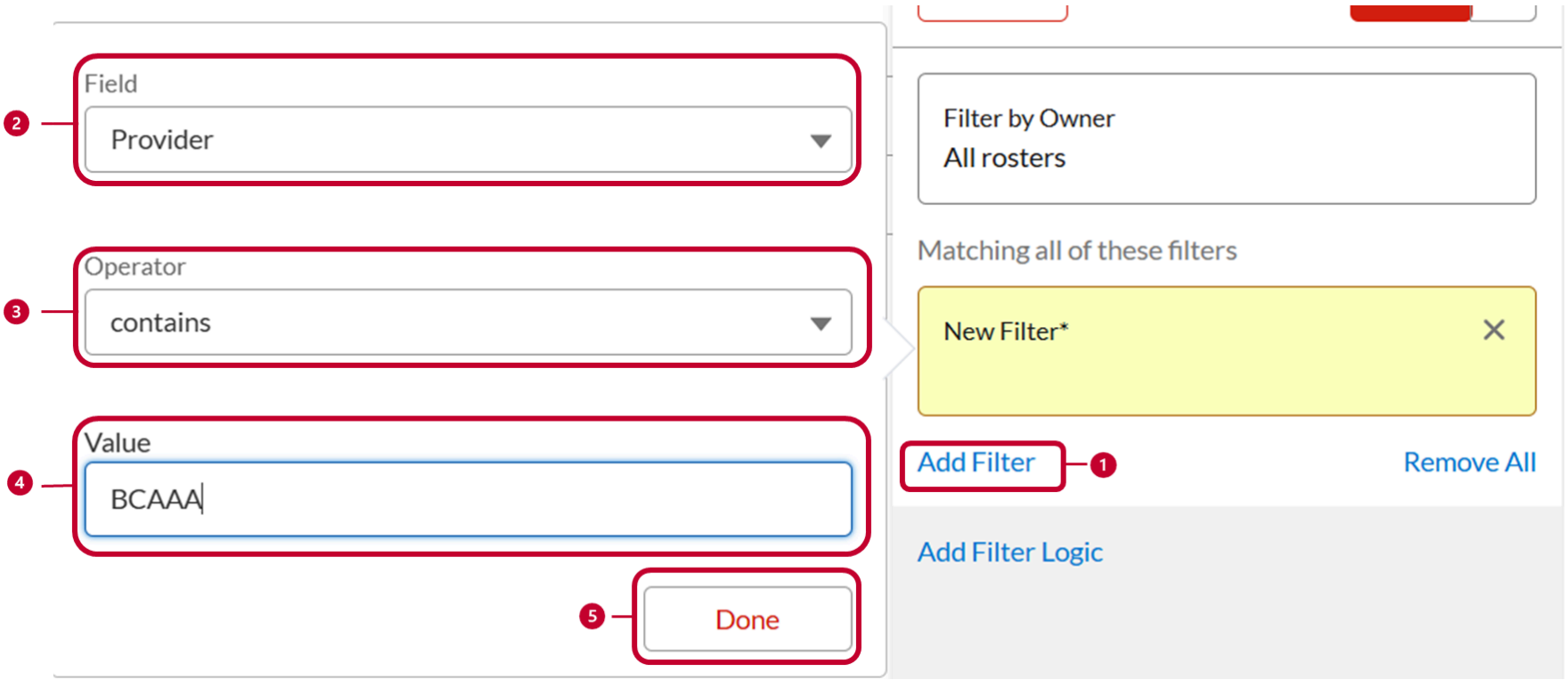
Creating a Custom List View: Rosters

Roster list views are easier to create because they can be filtered down by provider, provider location, and service. You will follow the same steps you did for the client list, the only difference here is that the fields and filters will come from the roster record.

Follow the steps starting on page 8, until you arrive at the filters. You'll notice that the default filter is here as well.



1. Click on Filter by Owner, this opens the box to the left
2. Select All rosters
3. Click Done

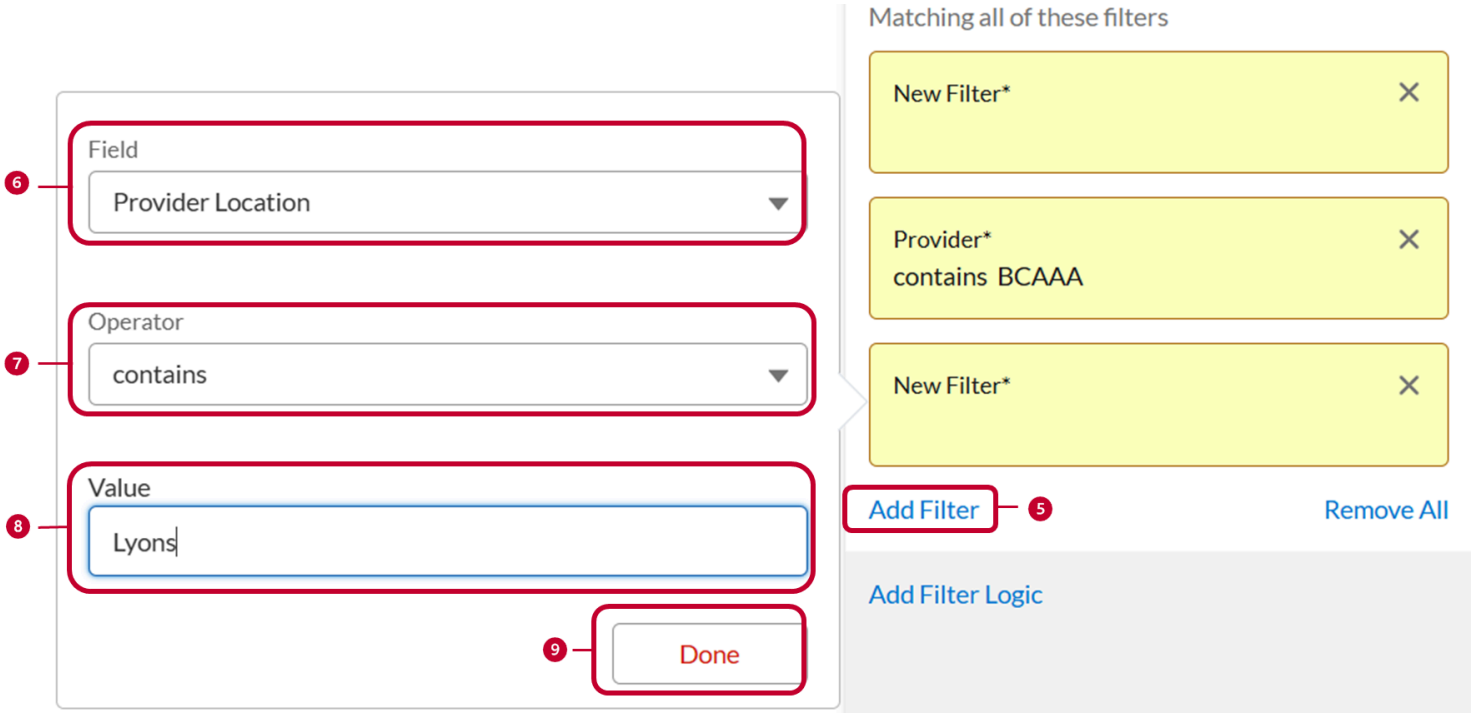


1. Click on Add Filter
2. Select Provider
3. Select contains
4. Type in BCAAA
5. Click Done

Two clarification points:

1. Since we are using a data point that is text (BCAAA), we use contains. The results are more reliable.
2. Contains is useful when you don't remember the exact provider name in SUDS. In this example, the full provider name is R3B BCAAA, but simply entering BCAAA is enough.

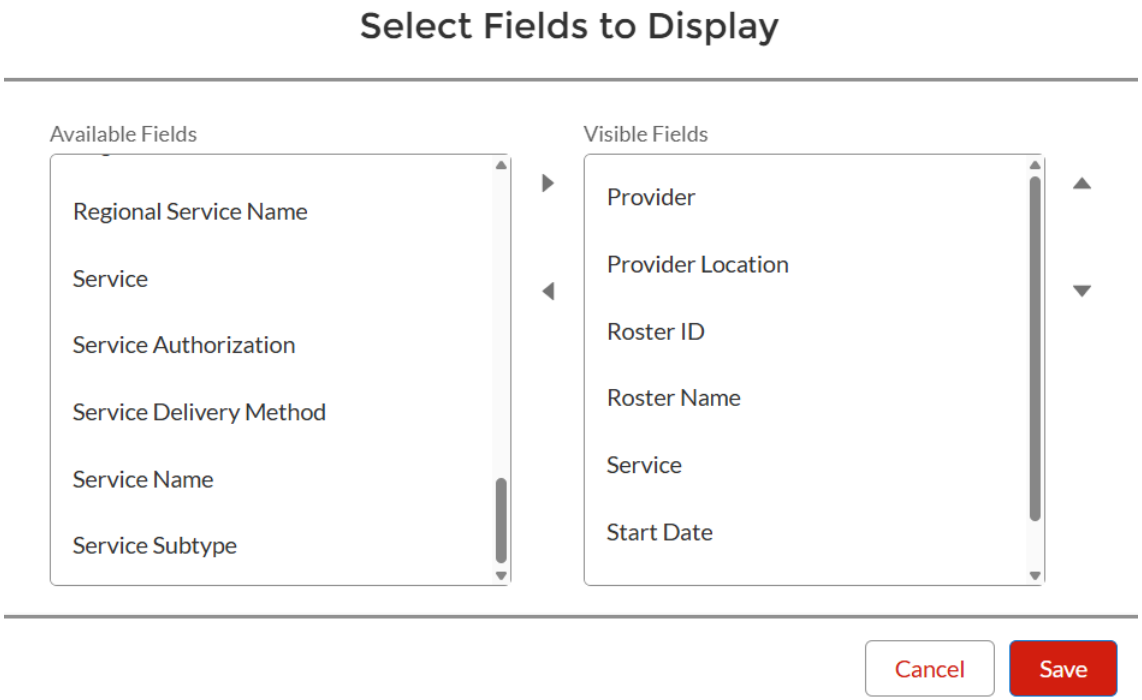
Next, we'll add a filter for a provider location.



5. Click Add Filter
6. Select Provider Location
7. Select contains
8. Select Lyons
9. Click Done

Once you've completed adding your filters, click Save.

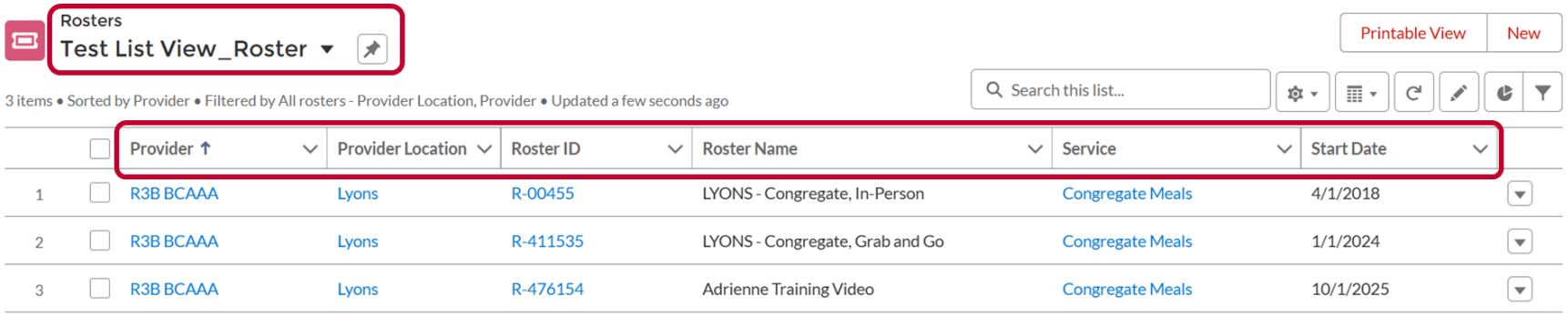
With the filters complete, it is time to add the fields. Follow the same steps listed on pages 13 and 14. The only difference here is the list of fields available to add.



Since rosters are tied to services, you will see service options you don't see on a client record.

The fields available to add all come from the roster record. The fields listed under Visible Fields are common components of a roster list view.

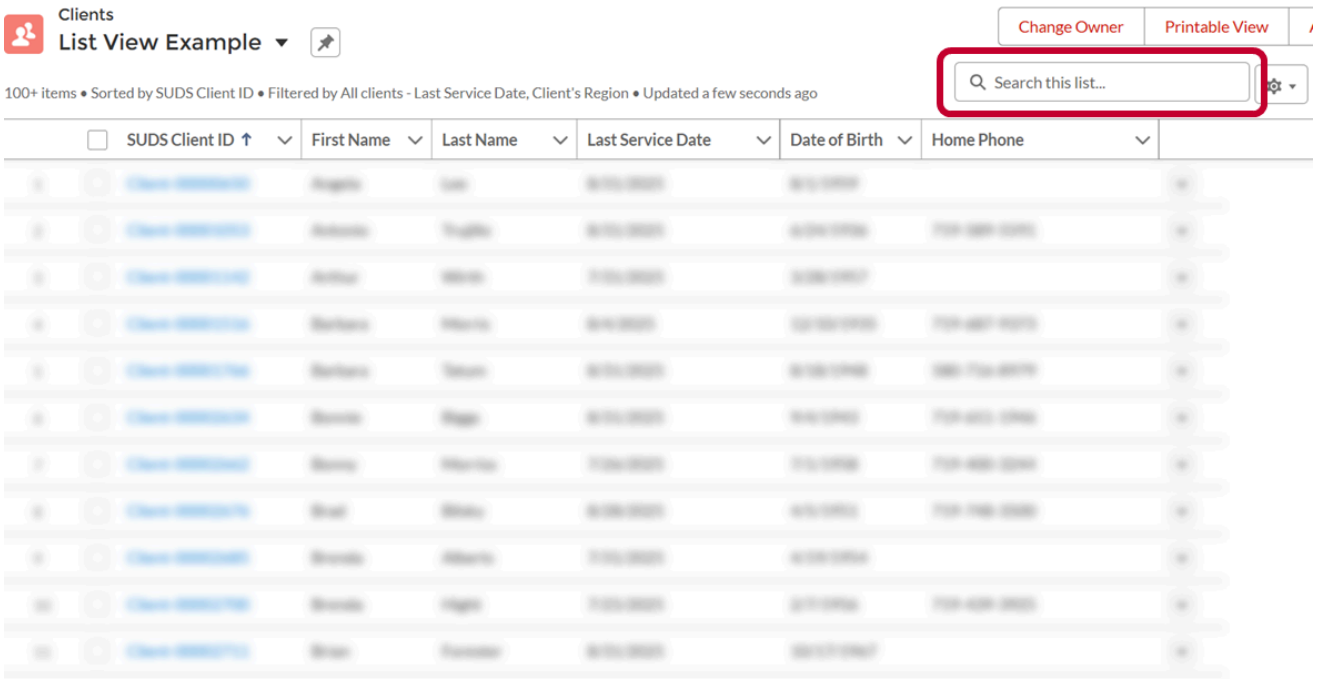
This is what the completed list view looks like. Rosters records are narrowed down to provider location and this location only has 3 rosters. We see the new list view name in the top left and the fields we selected form the header row.



	Provider ↑	Provider Location	Roster ID	Roster Name	Service	Start Date
1	R3B BCAAA	Lyons	R-00455	LYONS - Congregate, In-Person	Congregate Meals	4/1/2018
2	R3B BCAAA	Lyons	R-411535	LYONS - Congregate, Grab and Go	Congregate Meals	1/1/2024
3	R3B BCAAA	Lyons	R-476154	Adrienne Training Video	Congregate Meals	10/1/2025

List View Search

The List View Search is located toward the upper right of your Active List View. SUDS will search for keywords within all the List View records, even if that term is not visible on the list view. If you search for a keyword in a list view and that word is not in the first 2,000 rows, no results will appear.



The SUDS Data Team has created some list views for the sole purpose of searching its records (e.g., Region 4 SEARCH ALL Clients); however, list view searches tend to be less reliable than the global search field. If you cannot find the information you are looking for when searching a list view, try using global search instead. For more information on searching in SUDS, please review our Finding Clients Guide.

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