SUDS Tip Sheet: List of Client’s Rosters

(Found on the Client’s tab)

Overview

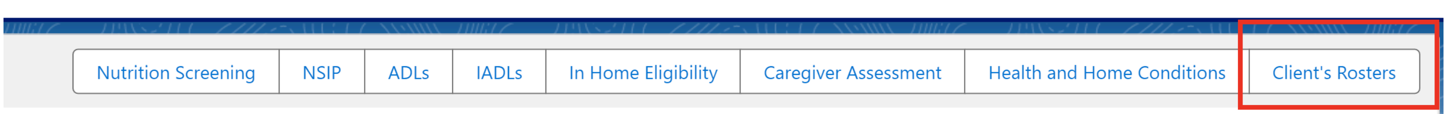
- The SUDS team added a new Client’s Rosters button to the SUDS client page
- The Client’s Rosters button takes you to a report that lists all the rosters the client is on

When should I use the Client’s Rosters button?

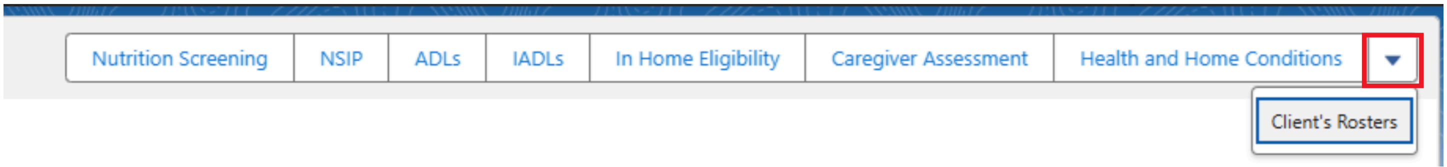
- The AAA Admin may find the Client’s Rosters report useful to:
    - See the client’s roster list before merging duplicate clients, as the “merge” client will disappear from rosters. The “keep” client will need to be manually entered onto the rosters the “merge” client was on.
    - Determine if a client is still active with any providers
    - See if a client who passed away, moved to a long term care facility, or moved out of state is on any rosters in their region before changing the client’s status to inactive
- A provider may find the Client’s Rosters report useful to:
    - See all their agency’s rosters the client is on
    - See if a client who passed away, moved to a long term care facility, or moved out of state is on any rosters for their agency before changing the client’s status to inactive

Where do I find the Client’s Rosters button?

- The Client’s Rosters button is on the top righthand side of the Client page with the Assessment buttons
    - If you have a wide screen, you will see the Client’s Rosters button next to the Health and Home Conditions button

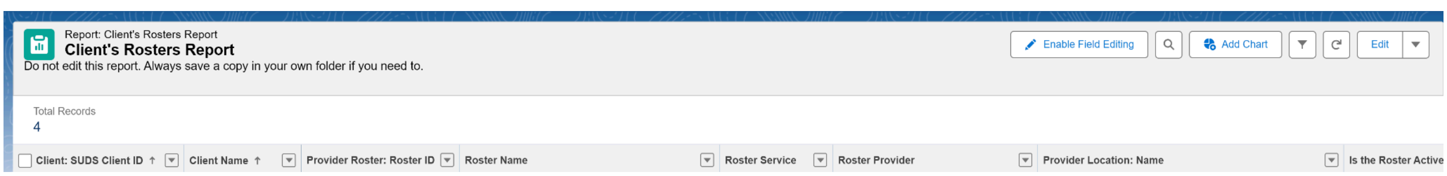


- ○ If you have a compact screen, you need to select the down arrow to the right of the Assessment buttons. Client's Rosters will appear in the dropdown options.

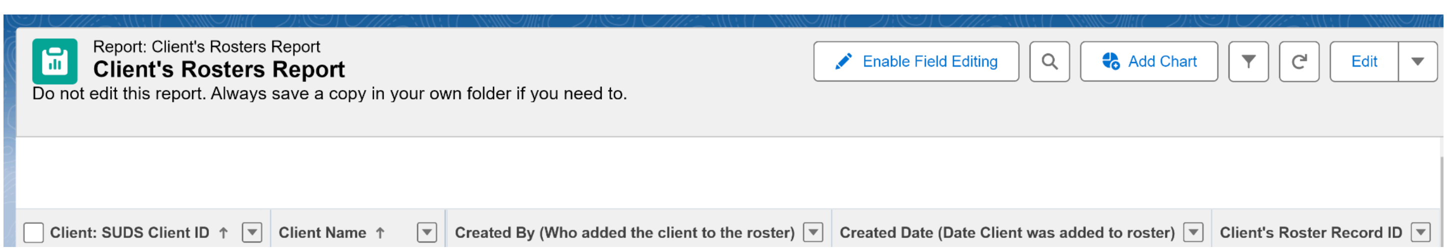


What does the Client's Roster Report look like?

- The report is automatically filtered to show the rosters for the client whose page you were on. The list of rosters will include active and inactive rosters.
- The report will list the following information for each roster the client is on:
  - Provider Roster ID - if you select the hyperlink in this column, it will take you to the roster
  - Roster Name
  - Roster Service
  - Roster Provider
  - Roster Provider Location
  - Is the Roster Active - If the checkbox is checked in the Is the Roster Active column, it means the roster is active



- The report will list the following information about the client's record tied to the roster
  - Created By (Who added the client to the roster)
  - Created Date (Date Client was added to the roster)
  - Client's Roster Record ID - if you select the hyperlink in this column, it will take you to the client's roster record. It will not take you to the Provider Roster page.

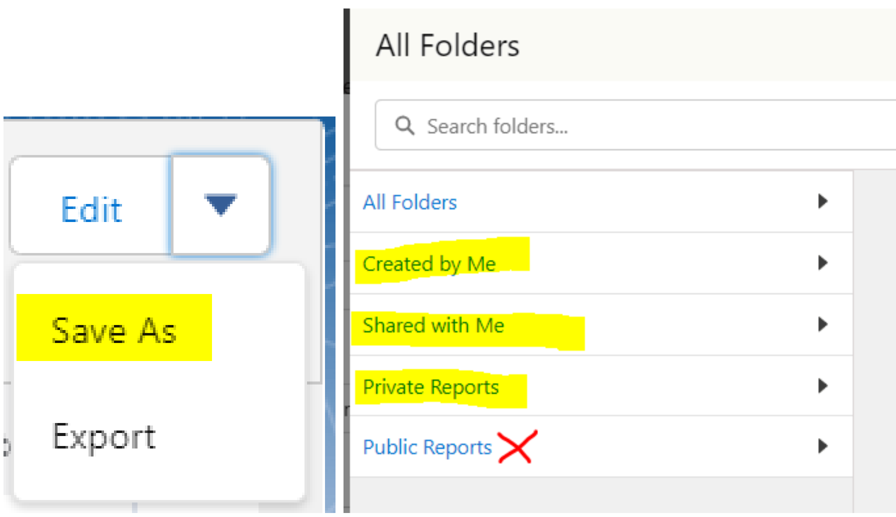


How can I make changes to the Client’s Roster Report

- Never edit the Client’s Roster report directly. The report is in the Public Folder so that all users can access it from the Client’s Rosters 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 save a copy of the report template to my own report folder?

1. On the Edit dropdown menu, select Save As
2. Select the … 3 dots before >All Users Report Templates at the top of the pop-up screen
3. Click Select Folder - choose your Private Folder or a Folder Created by You.
    a. Do not save reports in the Public Reports folder.
4. Then Select Save
5. You are now free to make any adjustments you need to the report saved in your folder. See “How do I make adjustments to the Reports?” instructions below.



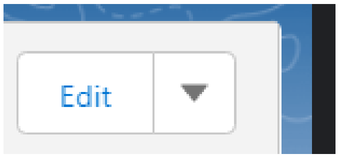
How do I download a copy of the report?

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

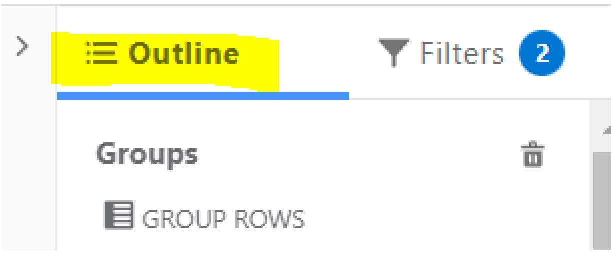
Adding information to the report:

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 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.



- 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 rosters

You can use the Client's Rosters report to clean up the rosters in SUDS.

- The AAA Admins can use the report to help them:
  - Merge duplicate clients - use the report to which rosters to add the keep client to based on which rosters the merged client was on
  - Alleviate memory space in SUDS
  - Monitor providers to ensure they are not making monthly rosters
  - Remove clients from rosters when they become inactive due to passing away, moving to an LTC, or moving out of state
- A provider can use the report to help them:
  - Remove clients from rosters who are no longer receiving your services
  - Minimize the amount of clients on your roster for easier viewing
  - Stop potential errors due to inactive clients when saving units on rosters

Rosters should not be repeatedly created. One roster is good for the length of a service. Do not end date your roster or create a new roster each month. This will also help keep the number of rosters a client is on to a minimum.

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