State Unit on Aging

SUDS Quarterly Data Monitoring Guide

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Background

Our federal partners, the Administration for Community Living (ACL), identified several data quality issues with our FFY 2023 federal data reporting process. Of highest concern: high missing rates of demographics, eligibility criteria, data reporting requirements, and assessments. The SUA is implementing Quarterly Data Monitoring (QDM) Reports to improve SUDS' data quality. These reports aim to review SUDS data on a more frequent cadence, enabling AAA Regions and the SUDS Data Team to address data quality concerns throughout the year proactively. Using the Service Definitions and Report Requirements Guide, we have developed 41 reports to monitor SUA requirements, including, but not limited to:

- Missing Client Demographics
- Missing Eligibility
- Missing Data Reporting Requirements
- Missing Assessments
- Overdue Assessments

These reports complement the monthly Data Errors and Expectations Reports (DEER), which the SUDS Data Team also manages.

Methodology Overview

For each series of reports, the SUDS Data Team queries clients who received service(s) during the reporting period. For example, for all Client Demographic reports, any client who received a service during the reporting period will be included in the report, regardless of the service received[1]. Inactive clients will also be included if they received a service during the reporting period. More detailed methodology information starts on Page 7. For each QDM metric, this guide provides the following information:

1. A definition of how the metric is calculated
2. An example of how the metric is calculated

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[1] Aggregate and Eligible/Non-Registered clients are not included in analysis.

3. The associated report name in SUDS, as well as all the fields and filters found in the report

Copies of all QDM reports can be found in SUDS under the All User Report Templates folder. There is a subfolder titled Quarterly Data Monitoring. Your report results will be tailored to your permissions in SUDS and will be displayed by Provider and Provider Location.

QDM Report Schedule

The SUDS Data Team will run QDM reports after service unit entry has been completed in SUDS. We acknowledge that service unit entry can be delayed for various reasons. We will work with individual regions when those situations arise.

Quarterly Data Monitoring Schedule for SFY2025

Quarter	QDM Reports Run by SUA	QDM Report Sent to Region
Q1 Jul-Sep 2024	Oct 23rd - 31st	October 31st
Q2 Oct-Dec 2024	Dec 23rd - 31st	December 31st
Q3 Jan-Mar 2025	Apr 23rd - 30th	April 30th
Q4 Apr-Jun 2025	July 23rd - 31st	July 31st

Key Takeaway

Our short-term goal is to build a collaborative process to review data quality concerns together. These reports are not meant to be a "top-down audit" of regional data quality but rather an opportunity to learn what is and is not working as regions collect data.

Our long-term goal is to have an overall missing data rate of less than 10%, which we recognize is ambitious. This percentage was chosen to align with ACL standards for all SUAs nationwide. Reaching this goal will take dedicated effort and collaboration from the AAA network and SUA teams. Accurate data helps us tell the story of the aging network's work and the need for additional funding to expand the supports provided to Coloradans as they age.

1 Client Demographics

Seven client demographics (often called the "Big 7") are required for all registered services by the SUA and ACL. If a region's missing data rates exceed 10% for any demographic field, the AAA will be notified to make corrections or identify technical assistance needs. AAA's must use one of the missing data options in SUDS if data are genuinely missing. At this time, QDM reports will include Not Collected as missing data. We chose this route since client demographics were not required until April 1, 2024, and any missing data on or before April 1 was updated to Not Collected. Since the QDM reports focus on clients who received services recently, regional efforts to improve data quality can be more targeted at those clients you are actively working with, versus clients who stopped receiving services over a year ago.

Demographics: Missing Age

Missing Age Calculation
$$\frac{\text{Clients without Age (Calculated Age=BLANK/NULL)}}{\text{Total Clients Served during Reporting Period}} = \text{Percent of Clients Missing Age}$$

Missing Age Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Calculated Age Entered=100 Calculated Age BLANK/NULL=50	Total=150 Number Missing (Calculated Age = BLANK/NULL)=50 Percent Missing=33% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Age
Block 1: Missing Age
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age

SUDS Website: https://sudscolorado.org

SUDS Email: CDHS_Sudshelpdesk@state.co.us

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Regional QDM: Missing Age
Filters: All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE Calculated Age = NULL/BLANK
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible Non-Registered = FALSE

Other Considerations: Date of Birth is always preferable to a write-in age. This report will pull in instances where Age has been added. These will not count toward the final missing rate. Age is also considered a key eligibility criteria for OAA services and will be monitored closely.

Demographics: Missing Gender

Missing Gender Calculation

Clients without Gender
Gender=BLANK/NULL or Not Collected
_____

Total Clients Served during Reporting Period

= Percent of Clients Missing Gender

Missing Gender Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Male=10 Female=15 BLANK/NULL=10 Not Collected=25 Client Refused=15	Total=75 Number Missing (NULL + Not Collected)=35 Percent Missing=47% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Gender

Block 1: Missing Gender

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Gender

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Gender = BLANK/NULL or Not Collected

Regional QDM: Missing Gender	1
Block 2: Total Clients	

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible Non-Registered = FALSE

Demographics: Missing Geography (Rural/Non-Rural)

Missing Geography Calculation

$$\frac{\text{Clients without Rural/Non-Rural}}{\text{Total Clients Served during Reporting Period}} = \text{Percent of Clients Missing Geography}$$

Clients without Rural/Non-Rural
Geography=BLANK/NULL and Zip Code Missing? ≠ Client
Refused, Client Doesn't Know, Client is a Minor
_____
Total Clients Served during Reporting Period

= Percent of Clients Missing Geography

Missing Geography Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Rural=10 Not Rural=15 BLANK/NULL=10 Not Collected=25 Client Refused=15	Total=75 Number Missing (BLANK/NULL + Not Collected)=35 Percent Missing=47% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Geography
Block 1: Missing Geography
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Geography, Zip Code, Zip Code Missing? **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE Geography=BLANK/NULL and Zip Code Missing? ≠ Client Refused, Client Doesn't Know, Client is a Minor
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID

Regional QDM: Missing Geography
Filters: All Clients   Date of Service = Previous Fiscal Quarter   Aggregate Client=FALSE   Eligible Non-Registered = FALSE

Other Considerations: The Rural/Non-Rural calculation is based on the Client's Home Zip Code and RUCA Guidance. The Mailing Zip Code does not populate a client's Geography.

Demographics: Missing Poverty

Missing Poverty Calculation
$$\frac{\text{Clients without Poverty}}{\text{Total Clients Served during Reporting Period}} = \text{Percent of Clients Missing Poverty}$$ Poverty=BLANK/NULL or Not Collected

Missing Poverty Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Above=10 At/Below=15 BLANK/NULL=50 Not Collected=50 Client Refused=15	Total=140 Number Missing (BLANK/NULL + Not Collected)=100 Percent Missing=71% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Poverty

Block 1: Missing Poverty

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Poverty

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Poverty=BLANK/NULL or Not Collected

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible Non-Registered = FALSE

Demographics: Missing Living Situation

Missing Living Situation Calculation

$$\frac{\text{Clients without Living Situation}}{\text{Total Clients Served during Reporting Period}} = \text{Percent of Clients Missing Living Situation}$$

Living Situation = BLANK/NULL or Not Collected

Missing Living Situation Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Alone=10 With Others=15 BLANK/NULL=0 Not Collected=3 Client Refused=15	Total=50 Number Missing (BLANK/NULL + Not Collected)=3 Percent Missing=6% Result: Missing Data < 10%. No action needed.

QDM: Missing Living Situation

Block 1: Missing Living Situation

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Living Situation

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE

QDM: Missing Living Situation
Living Situation= BLANK/NULL or Not Collected
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible Non-Registered = FALSE

Demographics: Missing Ethnicity

Missing Ethnicity Calculation

$$\frac{\text{Clients without Ethnicity (Ethnicity = BLANK/NULL or Not Collected)}}{\text{Total Clients Served during Reporting Period}} = \text{Percent of Clients Missing Ethnicity}$$

Missing Ethnicity Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Hispanic=10 Not Hispanic=15 BLANK/NULL=0	Total=50 Number Missing (BLANK/NULL + Not Collected)=3 Percent Missing=6%

Missing Ethnicity Analysis Example	
Not Collected=3 Client Refused=15	Result: Missing Data < 10%. No action needed.

Regional QDM: Missing Ethnicity

Block 1: Missing Ethnicity

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Ethnicity

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Ethnicity=BLANK/NULL or Not Collected

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE

Demographics: Missing Race

Missing Race Calculation

Clients without Race
Race = BLANK/NULL or Not Collected

———————————————————   **=**   Percent of Clients Missing Race

Total Clients Served during Reporting Period

Missing Race Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Any Race Provided=10 Other Not Listed=15 BLANK/NULL=0 Not Collected=5 Client Refused=15	Total=45 Number Missing (BLANK/NULL + Not Collected)=5 Percent Missing=11% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Race
Block 1: Missing Race

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Race

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Race=BLANK/NULL or Not Collected

Regional QDM: Missing Race
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE

2 Older Adult Eligibility

The FFY2023 OAAPS analysis identified a need to verify that eligibility requirements are being met before services are rendered. Most services only require that the client is 60 or older, but some services. In Spring 2024, the SUDS Data Team added a section to the client record for service eligibilities. These checkboxes are handy shortcuts that help SUDS users know if a client is eligible for a particular service based on their information in SUDS. Users do not need to check or uncheck any of these checkboxes; the system generates any checkmarks. Clients are considered eligible when the checkbox is checked. The checkboxes are the foundation of QDM reports.

Missing Eligibility: Adult Day Care/Adult Day Health

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Calculation

Clients without Adult Day Care/Adult Day Health
Eligibility
Adult Day Care/Adult Day Health Eligibility = FALSE

——————————————

Total Clients Who Received Adult Day Care/Adult Day
Health during the Reporting Period

= Percent of Clients Missing
Adult Day Care/Adult Day
Health Eligibility

How SUDS Calculates Adult Day Care/Adult Day Health Eligibility

To meet Adult Day Care/Adult Day Health Eligibility, a client must have the following in SUDS:
1. First Name
2. Last Name
3. Calculated Age >= 60
4. An ADL Assessment within the last 13 months with a score >= 2

   OR
5. An In-Home Eligibility Assessment within the last 13 months where the Cognitive
   Impairment Screening = "Yes"

Missing Adult Day Care/Adult Day Health Eligibility Analysis Example

Values in SUDS	Missing Calculation Methodology
Eligible Clients=250 Ineligible Clients=100	Total=350 Number Ineligible = 100 Percent Missing = 29% Result: Missing Data > 40%. Please review and correct.

SUDS Website: https://sudscolorado.org

SUDS Email:
CDHS_Sudshelpdesk@state.co.us

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Regional QDM: Missing ADC Eligibility

Block 1: Missing Adult Day Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Adult Day Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last ADL Assessment Date, ADL Assessment Score, Last In-Home Eligibility Assessment Date, Cognitive Impairment Level

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Adult Day Eligibility=FALSE
AAS Service Name=Adult Day Care/Adult Day Health

Block 2: Total Adult Day Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Adult Day Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Adult Day Care/Adult Day Health

Missing Eligibility: Case Management

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Calculation
Clients without Case Management Eligibility Case Management Eligibility = FALSE ――――――――― Total Clients Who Received Case Management Services during the Reporting Period   **=**   Percent of Clients Missing Case Management Eligibility

How SUDS Calculates Case Management Eligibility
To meet Case Management Eligibility, a client must have the following in SUDS: 1. First Name 2. Last Name 3. Calculated Age >= 60

Missing Case Management Eligibility Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Eligible Clients=250 Ineligible Clients=100	Total=350 Number Ineligible = 100 Percent Missing = 29% Result: Missing Data > 40%. Please review and correct.

Regional QDM: Missing CM Eligibility

Block 1: Missing Case Management Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Case Management Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Case Management Eligibility=FALSE
AAS Service Name=Case Management

Block 2: Total Case Management Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Case Management Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Case Management

Missing Eligibility: Chore Services

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Calculation

$$\frac{\text{Clients without Chore Services Eligibility (Chore Eligibility = FALSE)}}{\text{Total Clients Who Received Chore Services during the Reporting Period}} = \text{Percent of Clients Missing Chore Services Eligibility}$$

How SUDS Calculates Chore Services Eligibility

To meet Chore Services Eligibility, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age >= 60
4. An In-Home Eligibility Assessment within the last 13 months
   a. Can the client perform chore activities without help?
      i. The answer must be "No."

Missing Chore Services Eligibility Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Eligible Clients=250 Ineligible Clients=100	Total=350 Number Ineligible = 100 Percent Missing = 29% Result: Missing Data > 40%. Please review and correct.

Regional QDM: Missing Chore Eligibility	25

Block 1: Missing Chore Services Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Chore Services Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last In-Home Eligibility Assessment Date, Performs Chores without Help

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Chore Services Eligibility=FALSE
AAS Service Name=Chore Services

Block 2: Total Chore Services Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Chore Services Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Chore Services

Missing Eligibility: Congregate Meals

Missing Calculation

Clients without Congregate Meals Eligibility
Congregate Eligibility = FALSE

_____

Total Clients Who Received Congregate Meals Services during the Reporting Period

= Percent of Clients Missing Congregate Meals Eligibility

How SUDS Calculates Congregate Meals Eligibility

To meet Congregate Meals Eligibility, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. NSIP Eligibility Assessment Date (any date)
   a. Any NSIP Eligibility Assessment entry except "Not NSIP Eligible."

Missing Congregate Meals Eligibility Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Eligible Clients=250 Ineligible Clients=100	Total=350 Number Ineligible = 100 Percent Missing = 29% Result: Missing Data > 40%. Please review and correct.

Regional QDM: Missing Congregate Meals Eligibility

Block 1: Missing Congregate Meals Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Congregate Meals Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last NSIP Assessment Date, NSIP

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Congregate Meals Eligibility=FALSE
AAS Service Name=Congregate Meals

Block 2: Total Congregate Meals Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Congregate Meals Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Congregate Meals

Missing Eligibility: Home Delivered Meals (HDM)

Missing Home Delivered Meals Eligibility Calculation
Clients without HDM Eligibility Home Delivered Meals Eligibility = FALSE ——————————————— Total Clients Who Received Home Delivered Meals Services during the Reporting Period   **=**   Percent of Clients Missing Home Delivered Meals Eligibility

How SUDS Calculates Home Delivered Meals Eligibility
To meet HDM Eligibility, a client must have the following in SUDS: 1. First Name 2. Last Name 3. Calculated Age (any age) 4. NSIP Eligibility Assessment Date   a. Any NSIP Eligibility Assessment entry except "Individual with disabilities who resides in a housing facility where the congregate meal site is located" or "Not NSIP Eligible."

Missing Home Delivered Meals Eligibility Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Eligible Clients = 250 Ineligible Clients =100	Total=250 Number Missing Eligibility = 100 Percent Missing=40% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Home Delivered Meals Eligibility

Block 1: Missing HDM Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, HDM Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last NSIP Assessment Date, NSIP

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
HDM Eligibility=FALSE
AAS Service Name=Home Delivered Meals

Block 2: Total HDM Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, HDM Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Home Delivered Meals

Missing Eligibility: Homemaker

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Homemaker Eligibility Calculation

Clients without Homemaker Eligibility
Homemaker Eligibility = FALSE

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Total Clients Who Received Homemaker
Services during the Reporting Period

=

Percent of Clients Missing
Homemaker Eligibility

How SUDS Calculates Homemaker Eligibility

To meet Homemaker Eligibility, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age >= 60
4. An IADL Assessment dated within the last 13 months with an IADL Assessment Score >= 2

   OR

5. An In Home Eligibility Assessment dated within the last 13 months, where the Cognitive Impairment Screening question = "Yes"

Missing Homemaker Eligibility Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Eligible Clients = 250 Ineligible Clients = 100	Total=250 Number Missing Eligibility = 100 Percent Missing=40% Result: Missing Data > 10%. Please review and correct.

SUDS Website: https://sudscolorado.org

SUDS Email:
CDHS_Sudshelpdesk@state.co.us

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Regional QDM: Missing HM Eligibility

Block 1: Missing Homemaker Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Homemaker Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last IADL Assessment Date, IADL Assessment Score, Last In Home Eligibility Assessment Date, Cognitive Impairment

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Homemaker Eligibility=FALSE
AAS Service Name=Homemaker

Block 2: Total Homemaker Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Homemaker Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Homemaker

Missing Eligibility: Personal Care

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Personal Care Eligibility Calculation

Clients without Personal Care Eligibility
Personal Care Eligibility = FALSE

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Total Clients Who Received Personal Care
Services during the Reporting Period

= Percent of Clients Missing Personal Care Eligibility

How SUDS Calculates Personal Care Eligibility

To meet Personal Care Eligibility, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age >= 60
4. An ADL Assessment dated within the last 13 months with an ADL Assessment Score >= 2

   OR

5. An In Home Eligibility Assessment dated within the last 13 months, where the Cognitive Impairment Screening question = "Yes"

Missing Personal Care Eligibility Analysis Example

Values in SUDS	Missing Calculation Methodology
Eligible Clients = 250 Ineligible Clients = 100	Total=250 Number Missing Eligibility = 100 Percent Missing=40% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Personal Care Eligibility

Block 1: Missing PC Eligibility

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Personal Care Eligibility, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last ADL Assessment Date, ADL Assessment Score, Last In Home Eligibility Assessment, Cognitive Impairment

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Personal Care Eligibility=FALSE
AAS Service Name=Personal Care

Block 2: Total PC Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Personal Care Eligibility

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Personal Care

3 Older Adult Data Reporting Requirements

Outside of eligibility, the SUA has specific data reporting requirements detailed in both Policy and Procedure and the Service Definitions and Report Requirements Guide. These requirements typically include specific assessments or reassessments based on the service received. In Spring 2024, the SUDS Data Team added a section to the client record for data reporting requirements. These checkboxes are a handy shortcut to help SUDS users know if a client has the required data reporting requirements for the service they are receiving. Users do not need to check or uncheck any of these checkboxes; the system generates any checkmarks. Data reporting requirements are met when the checkbox is checked. The checkboxes are the foundation of QDM reports.

Missing Data Reporting Requirements: Basic Intake Eligibility & Requirements[2]

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Basic Intake Data Reporting Requirements Calculation

Clients without Basic Intake and Eligibility Requirements Basic Intake Eligibility & Requirements = FALSE ——————————————— Total Clients Who Received a Service Requiring Basic Intake Eligibility & Requirements	**=**	Percent of Clients Missing Basic Intake Requirements

Meeting Basic Intake Eligibility & Data Reporting Requirements in SUDS

To meet Basic Intake Eligibility & Requirements, clients must have the following data in

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[2] Services requiring a Basic Intake include: Assisted Transportation, Counseling, Education, Evidence-Based Disease Prevention and Health Promotion (EB), Material Aid, SNAP ED Fresh Conversations, Reassurance, Screening, and Transportation.

Meeting Basic Intake Eligibility & Data Reporting Requirements in SUDS

SUDS:

1. First Name
2. Last Name
3. Calculated Age >=60

Example Missing Basic Intake Eligibility & Requirements Analysis

Values in SUDS	Missing Calculation Methodology
Clients with Eligibility/Requirements=350 Clients without Eligibility/Requirements=100	Total=450 Number without Eligibility/Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Basic Intake

Block 1: Missing Basic Intake Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Basic Intake Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Basic Intake Requirements=FALSE
AAS Service Name=Assisted Transportation, Counseling, Education, Evidence-Based Disease

Regional QDM: Missing Basic Intake
Prevention and Health Promotion (EB), Material Aid, SNAP ED Fresh Conversations, Reassurance, Screening, Transportation
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Basic Intake Requirements **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE AAS Service Name=Assisted Transportation, Counseling, Education, Evidence-Based Disease Prevention and Health Promotion (EB), Material Aid, SNAP ED Fresh Conversations, Reassurance, Screening, Transportation

Missing Data Reporting Requirements: Adult Day Care/Adult Day Health

Missing Adult Day Data Reporting Requirements Calculation

Clients without Adult Day Requirements
Adult Day Requirements = FALSE

———————————

Total Clients Who Received Adult Day Care/Adult Day Health Services during the Reporting Period

$=$ Percent Missing Adult Day Requirements

Meeting Adult Day Care/Adult Day Health Data Reporting Requirements in SUDS

To meet Adult Day Care/Adult Day Health Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age >= 60
4. Nutrition Risk Assessment dated within the last 13 months
5. ADL Assessment within the last 13 months with a score >= 2
6. IADL Assessment dated within the last 13 months
7. In-Home Eligibility Assessment dated within the last 13 months

Missing Adult Day Data Reporting Requirement Analysis Example

Values in SUDS	Missing Calculation Methodology
Clients with Requirements=350 Clients without Requirements=100	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing ADC Requirements

Block 1: Missing Adult Day Care/Adult Day Health Data Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Adult Day Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last ADL Assessment Date, Last ADL Score, Last IADL Assessment Date, Last In-Home Eligibility Assessment Date

Regional QDM: Missing ADC Requirements

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Adult Day Requirements=FALSE

AAS Service Name=Adult Day Care/Adult Day Health

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Adult Day Requirements

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Adult Day Care/Adult Day Health

Missing Data Reporting Requirements: Case Management

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Case Management Data Reporting Requirements Calculation
$$\frac{\text{Clients without Case Management Requirements (Case Management Requirements=FALSE)}}{\text{Total Clients Who Received Case Management Services during the Reporting Period}} = \text{Percent Missing Case Management Requirements}$$

Meeting Case Management Data Reporting Requirements in SUDS
To meet Case Management Data Reporting Requirements, a client must have the following in SUDS: 1. First Name 2. Last Name 3. Calculated Age (any age) 4. Nutrition Risk Assessment dated within the last 13 months 5. ADL Assessment dated within the last 13 months 6. IADL Assessment dated within the last 13 months 7. In-Home Eligibility Assessment dated within the last 13 months

Missing Case Management Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=350 Clients without	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

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Missing Case Management Data Reporting Requirements Analysis Example	
Requirements=100	

Regional QDM: Missing CM Requirements

Block 1: Missing Case Management Data Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Case Management Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last ADL Assessment Date, Last IADL Assessment Date, Last In-Home Eligibility Assessment

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Case Management Data Requirements=FALSE
AAS Service Name=Case Management

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE

AAS Service Name=Case Management

Missing Data Reporting Requirements: Chore

Missing Chore Data Reporting Requirements Calculation

Clients without Chore Requirements
Chore Requirements=FALSE

———————————————

Total Clients Who Received Chore Services
during the Reporting Period

= Percent Missing Chore Requirements

Meeting Chore Data Reporting Requirements in SUDS

To meet Chore Data Reporting Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age >= 60
4. Nutrition Risk Assessment (any date)
5. ADL Assessment (any date)
6. IADL Assessment (any date)
7. In-Home Eligibility Assessment (any date) and "Performs Chore without Help" question is marked with "No"

Missing Chore Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with	Total=450

Missing Chore Data Reporting Requirements Analysis Example	
Requirements=350 Clients without Requirements=100	Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Chore Requirements

Block 1: Missing Chore Data Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Chore Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last ADL Assessment Date, Last IADL Assessment Date, Last In-Home Eligibility Assessment, Performs Chores without Help

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Chore Requirements=FALSE
AAS Service Name=Chore

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients

Regional QDM: Missing Chore Requirements	43

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Chore

Missing Data Reporting Requirements: Congregate Meals

Missing Congregate Meals Data Reporting Requirements Calculation

Clients without Congregate Meals Requirements
Congregate Requirements = FALSE

───────────────────────────── **=** Percent of Clients Missing
Congregate Meals Requirements

Total Clients Who Received Congregate Meals
during the Reporting Period

Meeting Congregate Meals Data Reporting Requirements in SUDS

For Congregate Meals Services, clients must have the following data in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Nutrition Risk Assessment (any date)
5. NSIP Eligibility Assessment (any date)
6. NSIP Eligibility = Any response except "Not Eligible"

Missing Congregate Meals Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=350 Clients without Requirements=100	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Congregate RQs
Block 1: Missing Congregate Meals Requirements
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Congregate Meals Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last NSIP Assessment Date, NSIP **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE Congregate Requirements=FALSE AAS Service Name=Congregate Meals
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Congregate Meals Requirements

Regional QDM: Missing Congregate RQs	45

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Congregate Meals

Other Considerations: Eligible/Non-Registered will be completely phased out by October 1, 2025.

Missing Data Reporting Requirements: Home-Delivered Meals (HDM)

Missing Home-Delivered Meals Data Reporting Requirements Calculation

$$\frac{\text{Clients without Home Delivered Meals Requirements}}{\text{Total Clients Who Received Home Delivered Meals during the Reporting Period}} = \text{Percent Missing Home Delivered Meals Requirements}$$

Home Delivered Meals Requirements= FALSE

Meeting Home-Delivered Meals Data Reporting Requirements in SUDS

To meet HDM Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Nutrition Risk Assessment dated within the last 13 months
5. ADL Assessment dated within the last 13 months

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Meeting Home-Delivered Meals Data Reporting Requirements in SUDS

6. IADL Assessment dated within the last 13 months
7. In-Home Eligibility Assessment dated within the last 13 months
8. NSIP Eligibility Assessment (any date)
9. Any NSIP Eligibility Assessment entry except "Individual with disabilities who resides in a housing facility where the congregate meal site is located" or "Not NSIP Eligible."

Missing Home-Delivered Meals Data Reporting Requirements Analysis Example

Values in SUDS	Missing Calculation Methodology
Clients with Requirements=350 Clients without Requirements=100	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing HDM Requirements

Block 1: Missing HDM Data Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, HDM Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last ADL Assessment Date, Last IADL Assessment Date, Last In Home Eligibility Assessment Date, Last NSIP Assessment Date, NSIP

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE

Regional QDM: Missing HDM Requirements	47
Eligible/Non-Registered Client=FALSE HDM Requirements=FALSE AAS Service Name=Home Delivered Meals	
Block 2: Total Clients	
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, HDM Requirements **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE AAS Service Name=Home Delivered Meals	

Missing Data Reporting Requirements: Homemaker

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and was added to QDM starting with SFY2025Q2 (October - December 2024).

Missing Homemaker Data Reporting Requirements Calculation
Clients without Homemaker Requirements Homemaker Requirements = FALSE ——————————————————— Total Clients Who Received Homemaker Services during the Reporting Period   =   Percent Missing Homemaker Requirements

Meeting Homemaker Data Reporting Requirements in SUDS

To meet Homemaker requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age >= 60
4. Nutrition Risk Assessment dated within the last 13 months
5. ADL Assessment dated within the last 13 months
6. IADL Assessment dated within the last 13 months with a score >= 2

    OR

7. In-Home Eligibility Assessment dated within the last 13 months, where the Cognitive Impairment Screening is marked with "Yes"

Regional QDM: Missing Homemaker RQ

Block 1: Missing Homemaker Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Homemaker Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last ADL Assessment Date, Last IADL Assessment Date, IADL Score, Last In-Home Eligibility Date, Cognitive Impairment

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Homemaker=FALSE
AAS Service Name=Homemaker

Block 2: Total Clients

Regional QDM: Missing Homemaker RQ	49

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Homemaker Requirements

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Homemaker

HOLD: Missing Data Reporting Requirements: Nutrition Counseling

Nutrition Counseling is currently on hold pending guidance from the Congregate Meal Policy Group

Missing Nutrition Counseling Data Reporting Requirements Calculation

$$\frac{\text{Clients without Nutrition Counseling Requirements}}{\text{Total Clients Who Received Nutrition Counseling during the Reporting Period}} = \text{Percent Missing Nutrition Counseling Requirements}$$

Nutrition Counseling Requirements = FALSE

Meeting Nutrition Counseling Data Reporting Requirements in SUDS

To meet Nutrition Counseling requirements, a client must have the following in SUDS:
1. First Name
2. Last Name
3. Calculated Age >= 60

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Meeting Nutrition Counseling Data Reporting Requirements in SUDS
4. Nutrition Risk Assessment (any date)

Missing Nutrition Counseling Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=350 Clients without Requirements=100	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing NC Requirements
Block 1: Missing NC Requirements
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Nutrition Counsel Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE Nutrition Counsel Requirement=FALSE AAS Service Name=Nutrition Counseling
Block 2: Total Clients

Regional QDM: Missing NC Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Nutrition Counsel Requirements

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Nutrition Counseling

Missing Data Reporting Requirements: Personal Care

February 2025 Update: This Service Eligibility checkbox was added to SUDS on February 1, 2025, and to QDM starting with SFY2025Q2 (October - December 2024).

Missing Personal Care Data Reporting Requirements Calculation

$$\frac{\text{Clients without Personal Care Requirements (Personal Care Requirements=FALSE)}}{\text{Total Clients Who Received Personal Care during the Reporting Period}} = \text{Percent Missing Personal Care Requirements}$$

Meeting Personal Care Data Reporting Requirements in SUDS

To meet Personal Care requirements, a client must have the following in SUDS:
1. First Name
2. Last Name

Meeting Personal Care Data Reporting Requirements in SUDS

3. Calculated Age >= 60
4. Nutrition Risk Assessment dated within the last 13 months
5. IADL Assessment dated within the last 13 months
6. ADL Assessment dated within the last 13 months with a score >= 2

   OR

7. In-Home Eligibility Assessment dated within the last 13 months, where the Cognitive Impairment Screening is marked with "Yes"

Missing Personal Care Data Reporting Requirements Analysis Example

Values in SUDS	Missing Calculation Methodology
Clients with Requirements=350 Clients without Requirements=100	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing PC Requirements

Block 1: Missing NC Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Personal Care Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Assessment Date, Last ADL Assessment Date, Last ADL Assessment Score, Last IADL Assessment Date, Last In Home Eligibility Assessment, Cognitive Impairment

Filters:
All Clients

Regional QDM: Missing PC Requirements	53

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Personal Care Requirement=FALSE

AAS Service Name=Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Personal Care Requirements

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Personal Care

HOLD: Missing Data Reporting Requirements: ADRC Case Management

ADRC Case Management is currently under review. This will be updated when available.

4 Caregiver Data Reporting Requirements

Missing Data Reporting Requirements: Caregiver Services[3]

Missing Caregiver Services Data Reporting Requirements Calculation

Clients without Caregiver Services Requirements
CG Services Requirements=FALSE

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Total Clients Who Received Caregiver Services
during the Reporting Period

$=$ Percent Missing Caregiver Services Requirements

Meeting Caregiver Services Data Reporting Requirements in SUDS

To meet Caregiver Services Data Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Caregiver Assessment (any date)
5. Client is a Caregiver=Yes

Missing Caregiver Services Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=350	Total=450 Number without Data Requirements=100 Percent Missing = 22%

[3] Caregiver Services include Caregiver Case Management, Caregiver Material Aid (Supplemental Service), Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Service), Caregiver Transportation (Supplemental Service)

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Missing Caregiver Services Data Reporting Requirements Analysis Example	
Clients without Requirements=100	Result: Missing Data > 10%. Please review and correct.

Regional QDM: CG Service Requirements
Block 1: Missing Caregiver Services Data Requirements
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, CG Services Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Client is a Caregiver, Caregiver Assessment Date **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE CG Services Requirements=FALSE AAS Service Name=Caregiver Case Management, Caregiver Material Aid (Supplemental Services), Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Services) , Caregiver Transportation (Supplemental Services)
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, CG Services Requirement **Filters:** All Clients Date of Service = Previous Fiscal Quarter

Regional QDM: CG Service Requirements
Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE AAS Service Name=Caregiver Case Management, Caregiver Material Aid (Supplemental Services), Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Services), Caregiver Transportation (Supplemental Services)

Missing Data Reporting Requirements: Caregiver Meals (Congregate and Home Delivered Meals)

Missing Caregiver Meals Data Reporting Requirements Calculation

$$\frac{\text{Clients without CG Meals Requirements (CG Meals Requirements=FALSE)}}{\text{Total Clients Who Received CG Congregate or CG Home Delivered Meal Services during the Reporting Period}} = \text{Percent Missing Caregiver Meals Requirements}$$

Meeting Caregiver Meals Data Reporting Requirements In SUDS

To meet Caregiver Meals Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Caregiver Assessment (any date)
5. Client is a Caregiver=Yes

Missing Caregiver Meals Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=250 Clients without Requirements=100	Total=350 Number without Data Requirements=100 Percent Missing=29% Result: Missing Data > 10%. Please review and correct.

Regional QDM: CG Meal Requirements
Block 1: Missing CG Meals Requirements
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, CG Meals Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Client is a Caregiver, Last Caregiver Assessment Date, Last NSIP Assessment Date **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE CG Meals Requirements=FALSE AAA Service Name=Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services)
Block 2: Total Clients
Joined Report Type: Clients with Units

Regional QDM: CG Meal Requirements
Fields: SUDS Client ID, CG Meals Requirements
Filters: All Clients   Date of Service = Previous Fiscal Quarter   Aggregate Client=FALSE   Eligible/Non-Registered Client=FALSE   AAA Service Name=Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services)

Missing Data Reporting Requirements: Caregiver Support Services[4]

Missing Caregiver Support Services Data Report Requirements Calculation
$$\frac{\text{Clients without Caregiver Support Services Requirements (CG Support Requirements=FALSE)}}{\text{Total Clients Who Received Caregiver Support Services during the Reporting Period}} = \text{Percent Missing Caregiver Support Services Requirements}$$

---

[4] Caregiver Support Services include Caregiver Counseling, Caregiver Support Groups, and Caregiver Training

Meeting Caregiver Support Services Data Reporting Requirements in SUDS

To meet Caregiver Support Services Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Client is a Caregiver=Yes

Missing Caregiver Support Service Data Reporting Requirements Analysis Example

Values in SUDS	Missing Calculation Methodology
Clients with Requirements=250 Clients without Requirements=100	Total=350 Number without Data Requirements=100 Percent Missing=29% Result: Missing Data > 10%. Please review and correct.

Regional QDM: CG Support Requirements

Block 1: Missing CG Support Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, CG Support Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Client is a Caregiver

Filters:
All Clients
Date of Service = Previous Fiscal Quarter

Regional QDM: CG Support Requirements

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

CG Support Requirements=FALSE

AAS Service Name=Caregiver Counseling, Caregiver Training, Caregiver Support Groups

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, CG Support Requirements

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Caregiver Counseling, Caregiver Training, Caregiver Support Groups

6 Grandparent Caregiver Data Reporting Requirements

Missing Data Reporting Requirements: Grandparent Caregiver Services[5]

Missing Grandparent Caregiver Services Data Reporting Requirements Calculation

$$\frac{\text{Clients without GP Caregiver Services Requirements}}{\text{Total Clients Who Received GP Caregiver Services during the Reporting Period}} = \text{Percent Missing Grandparent Caregiver Services Requirements}$$

GCG Services Requirements=FALSE

Meeting Grandparent Caregiver Services Data Reporting Requirements in SUDS

To meet Grandparent Caregiver Services Data Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Caregiver Assessment (any date)
5. Client is a Caregiver=Yes
6. Client is a Grandparent Caregiver=Yes

---

[5] Grandparent Caregiver Services include Grandparent Caregiver Case Management, Grandparent Caregiver Material Aid (Supplemental Services), Grandparent Caregiver Respite, Grandparent Caregiver Screening/Evaluation (Supplemental Services), Grandparent Caregiver Transportation (Supplemental Services)

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Missing Grandparent Caregiver Services Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=350 Clients without Requirements=100	Total=450 Number without Data Requirements=100 Percent Missing = 22% Result: Missing Data > 10%. Please review and correct.

Regional QDM: GP CG Service Requirements
Block 1: Missing GCG Services Requirements
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, GP Caregiver Services Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Client is a Caregiver, Client is a Grandparent Caregiver, Grandparent Caregiver Assessment Date **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE GP Caregiver Services Requirements=FALSE AAS Service Name=Grandparent Caregiver Case Management, Grandparent Caregiver Material Aid (Supplemental Services), Grandparent Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Services),Grandparent Caregiver Transportation (Supplemental Services)
Block 2: Total Clients

Regional QDM: GP CG Service Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, GP Caregiver Services Requirement

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Grandparent Caregiver Case Management, Grandparent Caregiver Material Aid (Supplemental Services), Grandparent Caregiver Respite, Grandparent Caregiver Screening/Evaluation (Supplemental Services), Grandparent Caregiver Transportation (Supplemental Services)

Missing Data Reporting Requirements: Grandparent Caregiver Meals (Congregate and Home Delivered Meals)

Missing Grandparent Caregiver Meals Data Reporting Requirements Calculation

$$\frac{\text{Clients without GP Caregiver Meals Requirements}}{\text{Total Clients Who Received GP Caregiver Congregate or GP Caregiver Home Delivered Meal Services during the Reporting Period}} = \text{Percent Missing Grandparent Caregiver Meals Requirements}$$

GCG Meals Requirements=FALSE

Meeting Grandparent Caregiver Meals Data Reporting Requirements in SUDS

To meet Grandparent Caregiver Meal Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Caregiver Assessment (any date)
5. Client is a Caregiver=Yes
6. Client is a Grandparent Caregiver=Yes

Missing Grandparent Caregiver Meals Data Reporting Requirements Analysis Example

Values in SUDS	Missing Calculation Methodology
Clients with Requirements=250 Clients without Requirements=100	Total=350 Number without Data Requirements=100 Percent Missing=29% Result: Missing Data > 10%. Please review and correct.

Regional QDM: GP CG Meal Requirements

Block 1: Missing GP Caregiver Meals Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, GP Caregiver Meals Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Client is a Caregiver, Client is a Grandparent Caregiver, Last Caregiver Assessment Date,

Regional QDM: GP CG Meal Requirements	65

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

GCG Meals Requirements=FALSE

AAS Service Name=Grandparent Caregiver Congregate Meals (Supplemental Services),
Grandparent Caregiver Home Delivered Meals (Supplemental Services)

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, GP Caregiver Meals Requirements

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Grandparent Caregiver Congregate Meals (Supplemental Services),
Grandparent Caregiver Home Delivered Meals (Supplemental Services)

Missing Data Reporting Requirements: Grandparent Caregiver Support Services[6]

Missing Grandparent Caregiver Support Services Data Report Requirements Calculation

Clients without GP Caregiver Support Services Requirements
GCG Support Requirements=FALSE

———————————

Total Clients Who Received GP Caregiver Support Services during the Reporting Period

$=$ Percent Missing Grandparent Caregiver Support Requirements

Meeting Grandparent Caregiver Support Services Data Reporting Requirements in SUDS

To meet GP Caregiver Support Requirements, a client must have the following in SUDS:

1. First Name
2. Last Name
3. Calculated Age (any age)
4. Client is a Caregiver=Yes
5. Client is a Grandparent Caregiver=Yes

Missing Grandparent Caregiver Support Data Reporting Requirements Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Requirements=250 Clients without Requirements=100	Total=350 Number without Data Requirements=100 Percent Missing=29% Result: Missing Data > 10%. Please review and correct.

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[6] Grandparent Caregiver Support Services include Grandparent Caregiver Counseling, Grandparent Caregiver Training, and Grandparent Caregiver Support Groups

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Regional QDM: GP CG Support Requirements

Block 1: Missing GP Caregiver Support Requirements

Joined Report Type: Clients with Units

Fields: SUDS Client ID, GP Caregiver Support Requirements, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Client is a Caregiver

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
CG Support Requirements=FALSE
AAS Service Name=Grandparent Caregiver Counseling, Grandparent Caregiver Training, Grandparent Caregiver Support Groups

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, GP Caregiver Support Requirements

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Grandparent Caregiver Counseling, Grandparent Caregiver Training, Grandparent Caregiver Support Groups

7 Missing Assessments

While Missing Assessment reports are available in the All User Reports Template folder in SUDS, these reports have been modified to look for missing assessments based on clients served during the quarterly reporting period. This will help prioritize missing assessments for clients who recently received services.

Missing Assessments: NSIP Eligibility Assessment[7]

Missing NSIP Eligibility Assessment Calculation

$$\frac{\text{Clients without NSIP Eligibility Assessment (Last NSIP Assessment Date = BLANK/NULL)}}{\text{Total Clients Who Received a Service Requiring an NSIP Eligibility Assessment}} = \text{Percent Missing NSIP Eligibility Assessment}$$

Missing NSIP Eligibility Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Required Assessment=500 Clients without Required Assessment=100	Total=600 Number of Missing Assessments=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

---

[7] Services requiring an NSIP Eligibility Assessment include: Congregate Meals, Home Delivered Meals, Caregiver Congregate Meals, Caregiver Home Delivered Meals, Grandparent Caregiver Congregate Meals, Caregiver Home Delivered Meals.

Regional QDM: Missing NSIP Eligibility

Block 1: Missing NSIP Eligibility Assessment

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last NSIP Assessment Date, NSIP

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Last NSIP Eligibility Assessment Date=BLANK/NULL
AAS Service Name=Congregate Meals, Home Delivered Meals, Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services)

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Last NSIP Assessment Date, NSIP

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Congregate Meals, Home Delivered Meals, Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services)

Missing Assessments: Nutrition Risk Assessment (Nutrition Screening)[8]

Missing Nutrition Risk Assessment Calculation
Clients without Nutrition Risk Assessment Last Nutrition Risk Assessment Date=BLANK/NULL ——————————————————————————— Total Clients Who Received a Service Requiring a Nutrition Risk Assessment   =   Percent Missing Nutrition Risk Assessment

Missing Nutrition Risk Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients without Nutrition Risk Assessment=100 Total Number of Clients Served=500	Total Client=600 Number Missing Nutrition Risk Assessment=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing Nutrition Risk
Block 1: Missing Nutrition Risk Assessment
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Risk Assessment Date **Filters:** All Clients

---

[8] Services requiring a Nutrition Risk Assessment include: Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, and Personal Care

Regional QDM: Missing Nutrition Risk
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Last Nutrition Risk Assessment Date=BLANK/NULL
AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care
Block 2: Total Clients
Joined Report Type: Clients with Units **Fields:** SUDS Client ID **Filters:** All Clients Date of Service = Previous Fiscal Quarter Aggregate Client=FALSE Eligible/Non-Registered Client=FALSE AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Missing Assessment: Activities of Daily Living (ADL)[9]

Missing ADL Assessment Calculation

Clients without ADL Assessment
Last ADL Assessment Date=BLANK/NULL

———————————————

Total Clients Who Received a Service Requiring
an ADL Assessment

= Percent Missing ADL Assessment

Missing ADL Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Required Assessment=500 Clients without Required Assessment=100	Total=600 Number Missing Assessment=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing ADL Assessment
Block 1: Missing ADL Assessment
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last ADL Assessment Date **Filters:** All Clients

---

[9] Services requiring an ADL Assessment include: Adult Day Care/Adult Day Health, Case Management, Chore, Home Delivered Meals, Homemaker, and Personal Care

Regional QDM: Missing ADL Assessment

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Last ADL Assessment Date=BLANK/NULL

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Missing Assessment: Instrumental Activities of Daily Living (IADL)[10]

Missing IADL Assessment Calculation

$$\frac{\text{Clients without IADL Assessment}}{\text{Total Clients Who Received a Service Requiring an IADL Assessment}} = \text{Percent Missing IADL Assessment}$$

Clients without IADL Assessment
Last IADL Assessment Date=BLANK/NULL

Total Clients Who Received a Service Requiring an IADL Assessment

= Percent Missing IADL Assessment

Missing IADL Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Required Assessment=500 Clients without Required Assessment=100	Total=600 Number Missing Assessment=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

---

[10]Services requiring an IADL Assessment include: Adult Day Care/Adult Day Health, Case Management, Chore, Home Delivered Meals, Homemaker, and Personal Care

QDM: Missing IADL Assessment

Block 1: Missing IADL Assessment

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last ADL Assessment Date

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Last IADL Assessment Date=BLANK/NULL
AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Missing Assessment: In-Home Eligibility Assessment[11]

Missing In-Home Eligibility Assessment Calculation

Clients without In-Home Eligibility Assessment
Last In-Home Eligibility Assessment Date=BLANK/NULL

———————————————————————

Total Clients Who Received a Service Requiring an
In-Home Eligibility Assessment

=   Percent Missing In-Home Eligibility Assessment

Missing In-Home Eligibility Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Required Assessment=500 Clients without Required Assessment=100	Total=600 Number Missing Assessment=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing In-Home Assessment
Block 1: Missing In-Home Eligibility Assessment
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last in-Home Eligibility Assessment Date **Filters:** All Clients

---

[11] Services requiring a Nutrition Risk Assessment include: Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, and Personal Care

Regional QDM: Missing In-Home Assessment

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Last In-Home Eligibility Assessment Date=BLANK/NULL

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last in-Home Eligibility Assessment Date

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Chore, Congregate Meals, Home Delivered Meals, Homemaker, Nutrition Counseling, Personal Care

Missing Assessment: Caregiver Assessment[12]

Missing Caregiver Assessment Calculation

Clients without Caregiver Assessment
Last Caregiver Assessment Date=BLANK/NULL

─────────────────────────────

Total Clients Who Received a Service Requiring
a Caregiver Assessment

= Percent Missing Caregiver Assessment

Missing Caregiver Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Required Assessment=500 Clients without Required Assessment=100	Total=600 Number Missing Assessment=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing CG Assessment
Block 1: Missing Caregiver Assessment
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Caregiver Assessment Date, Client is a Caregiver

---

[12] Services requiring a Caregiver Assessment include: Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services), Caregiver Case Management, Caregiver Material Aid (Supplemental Services), Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Services), and Caregiver Transportation (Supplemental Services)

Regional QDM: Missing CG Assessment

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Last Caregiver Assessment Date=BLANK/NULL

Client is a Caregiver=TRUE

AAS Service Name=Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services), Caregiver Case Management, Caregiver Material Aid (Supplemental Services), Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Services), Caregiver Transportation (Supplemental Services)

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Client is a Caregiver=TRUE

AAS Service Name=Caregiver Congregate Meals (Supplemental Services), Caregiver Home Delivered Meals (Supplemental Services), Caregiver Case Management, Caregiver Material Aid (Supplemental Services), Caregiver Respite, Caregiver Screening/Evaluation (Supplemental Services), Caregiver Transportation (Supplemental Services)

Missing Assessment: Grandparent Caregiver Assessment[13]

Missing Grandparent Caregiver Assessment Calculation

Clients without GP Caregiver Assessment
Last GP Caregiver Assessment Date=BLANK/NULL

$$\frac{\text{Clients without GP Caregiver Assessment}}{\text{Total Clients Who Received a Service Requiring a Grandparent Caregiver Assessment}} = \text{Percent Missing Grandparent Caregiver Assessment}$$

Missing Grandparent Caregiver Assessment Analysis Example	
Values in SUDS	**Missing Calculation Methodology**
Clients with Required Assessment=500 Clients without Required Assessment=100	Total=600 Number Missing Assessment=100 Percent Missing=17% Result: Missing Data > 10%. Please review and correct.

Regional QDM: Missing GPCG Assessment
Block 1: Missing Grandparent Caregiver Assessment
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Caregiver Assessment Date, Client is a Caregiver, Client is a Grandparent Caregiver

---

[13] Services requiring a Grandparent Caregiver Assessment include: Grandparent Caregiver Congregate Meals (Supplemental Services), Grandparent Caregiver Home Delivered Meals (Supplemental Services), Grandparent Caregiver Case Management, Grandparent Caregiver Material Aid (Supplemental Services), Grandparent Caregiver Respite, Grandparent Caregiver Screening/Evaluation (Supplemental Services), and Grandparent Caregiver Transportation (Supplemental Services)

Regional QDM: Missing GPCG Assessment

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Last Caregiver Assessment Date=BLANK/NULL

Client is a Caregiver=TRUE

Client is a Grandparent Caregiver=TRUE

AAS Service Name=Grandparent Caregiver Congregate Meals (Supplemental Services), Grandparent Caregiver Home Delivered Meals (Supplemental Services), Grandparent Caregiver Case Management, Grandparent Caregiver Material Aid (Supplemental Services), Grandparent Caregiver Respite, Grandparent Caregiver Screening/Evaluation (Supplemental Services), Grandparent Caregiver Transportation (Supplemental Services)

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Client is a Caregiver=TRUE

Client is a Grandparent Caregiver=TRUE

AAS Service Name=Grandparent Caregiver Congregate Meals (Supplemental Services), Grandparent Caregiver Home Delivered Meals (Supplemental Services), Grandparent Caregiver Case Management, Grandparent Caregiver Material Aid (Supplemental Services), Grandparent Caregiver Respite, Grandparent Caregiver Screening/Evaluation (Supplemental Services), Grandparent Caregiver Transportation (Supplemental Services)

8 Overdue Reassessments

Several services require reassessments to be done on an annual basis. Regions have 13 months to complete these reassessments. The Overdue Assessment reports pull in any clients who received a service requiring reassessment, and their reassessment has yet to be completed within the last 13 months.

Overdue Assessment: Nutrition Risk Assessment (Nutrition Screening)[14]

Overdue Nutrition Risk Assessment Calculation
Clients with an Overdue Nutrition Risk Reassessment Last Nutrition Risk Assessment Date < LAST 396 DAYS _____ Total Clients Who Received a Service Requiring a Nutrition Risk Reassessment   **=**   Percent Overdue Nutrition Risk Reassessment

Overdue Nutrition Risk Reassessment Analysis Example	
Values in SUDS	**Overdue Calculation Methodology**
Clients with Assessment=250 Clients with Overdue	Total=450 Number Overdue Reassessment=200 Percent Missing=44% Result: Missing Data > 10%. Please review and correct.

[14] Services requiring a Nutrition Risk Reassessment include: Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, and Personal Care

Overdue Nutrition Risk Reassessment Analysis Example	
Assessment=200	

QDM: Overdue Nutrition Risk

Block 1: Overdue Nutrition Risk Reassessment

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last Nutrition Risk Assessment Date

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Last Nutrition Risk Assessment Date < LAST 396 DAYS
AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Last Nutrition Risk Assessment Date

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE

QDM: Overdue Nutrition Risk
Eligible/Non-Registered Client=FALSE AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Overdue Assessment: Activities of Daily Living (ADLs)[15]

Overdue ADL Reassessment Calculation

Clients with an Overdue ADL Reassessment
Last ADL Assessment Date < LAST 396 DAYS

_____

Total Clients Who Received a Service
Requiring an ADL Reassessment

$=$ Percent Overdue ADL Reassessment

Overdue ADL Reassessment Analysis Example	
Values in SUDS	**Overdue Calculation Methodology**
Clients with Assessment=250 Clients with Overdue Assessment=200	Total=450 Number Overdue Reassessment=200 Percent Missing=44% Result: Missing Data > 10%. Please review and correct.

---

[15] Services requiring an ADL Reassessment include: Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, and Personal Care

QDM: Overdue ADL Reassessment

Block 1: Overdue ADL Reassessment

Joined Report Type: Clients with Units

Fields: SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last ADL Assessment Date

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
Last ADL Assessment Date < LAST 396 DAYS
AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:
All Clients
Date of Service = Previous Fiscal Quarter
Aggregate Client=FALSE
Eligible/Non-Registered Client=FALSE
AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Overdue Assessment: Instrumental Activities of Daily Living (IADLs)[16]

Overdue IADL Reassessment Calculation	
Clients with an Overdue IADL Reassessment Last IADL Assessment Date < LAST 396 DAYS ——————————————————— Total Clients Who Received a Service Requiring an IADL Reassessment	**=** Percent Overdue IADL Reassessment

Overdue IADL Reassessment Analysis Example	
Values in SUDS	**Overdue Calculation Methodology**
Clients with Assessment=250 Clients with Overdue Assessment=200	Total=450 Number Overdue Reassessment=200 Percent Missing=44% Result: Missing Data > 10%. Please review and correct.

QDM: Overdue IADL Reassessment
Block 1: Overdue ADL Reassessment
Joined Report Type: Clients with Units **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last IADL Assessment Date **Filters:**

---

[16] Services requiring an IADL Assessment include: Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, and Personal Care

QDM: Overdue IADL Reassessment

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Last IADL Assessment Date < LAST 396 DAYS

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Overdue Assessment: In-Home Eligibility Assessment[17]

Overdue In-Home Eligibility Reassessment Calculation
$$\frac{\text{Clients with an Overdue In-Home Eligibility Reassessment}}{\text{Total Clients Who Received a Service Requiring an In-Home Eligibility Reassessment}} = \text{Percent Overdue In-Home Eligibility Reassessment}$$ Last In-Home Eligibility Assessment Date < LAST 396 DAYS

Overdue In-Home Eligibility Reassessment Analysis Example	
Values in SUDS	**Overdue Calculation Methodology**
Clients with Assessment=250 Clients with Overdue Assessment=200	Total=450 Number Overdue Reassessment=200 Percent Missing=44% Result: Missing Data > 10%. Please review and correct.

QDM: Overdue In-Home Eligibility Reassessment
Block 1: Overdue In-Home Eligibility Reassessment
Joined Report Type: Clients with Units   **Fields:** SUDS Client ID, Status, Client Full Name, Last Service Date, Services Received, Date of Birth, Calculated Age, Missing DOB?, Age, Missing Age?, Last IADL Assessment Date

---

[17] Services requiring an In-Home Eligibility Reassessment include: Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, and Personal Care

QDM: Overdue In-Home Eligibility Reassessment

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

Last In-Home Eligibility Assessment Date < LAST 396 DAYS

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Block 2: Total Clients

Joined Report Type: Clients with Units

Fields: SUDS Client ID

Filters:

All Clients

Date of Service = Previous Fiscal Quarter

Aggregate Client=FALSE

Eligible/Non-Registered Client=FALSE

AAS Service Name=Adult Day Care/Adult Day Health, Case Management, Home Delivered Meals, Homemaker, Personal Care

Appendix A: Using Client-Level Reports in SUDS

Since the Quarterly Data Monitoring(QDM) reports are based on service units, the report results duplicate (one record for each service unit record). This makes it harder to focus on the individual client whose data needs to be corrected.

We have created another series of reports that identify clients missing eligibility, data reporting requirements, assessments, and overdue assessments. These reports can be found in SUDS.

Go to: Reports -> All Users Report Templates -> Quarterly Data Monitoring

The client reports are located under each QDM subcategory (i.e., Regional QDM: Missing Assessments). These reports mirror the QDM reports and look for clients who received service units during the state fiscal quarter. Just like the QDM reports, none of these reports can account for new enrollment or recent reenrollment. They also do not list the Provider who rendered the service, since client reports like this do not pull in service unit information

The following steps will explain how to:

1. Open one of these client reports
2. Save your own copy
3. Adding a cross-filter to filter on specific providers
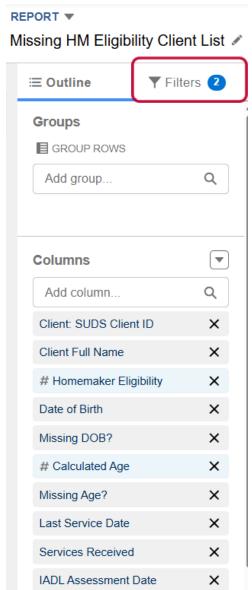4. How to read the report
5. Change the Date of Service filter

Opening and Saving a Copy of a Client Report

1. Open any Missing Eligibility Client List report (they are labeled by service).

   a. Missing HM (Homemaker) Eligibility Clients will be used for this example

2. Save your own copy of the report

   a. Click the caret to the right of Edit

   b. Click Save As

   c. Update the title and save to your Private folder or another shared folder for your agency

3. With the report results open, click Edit

4. This opens the Report Builder

5. Click on Filters, which has a blue circle next to it.

REPORT ▼

Missing HM Eligibility Client List ✎
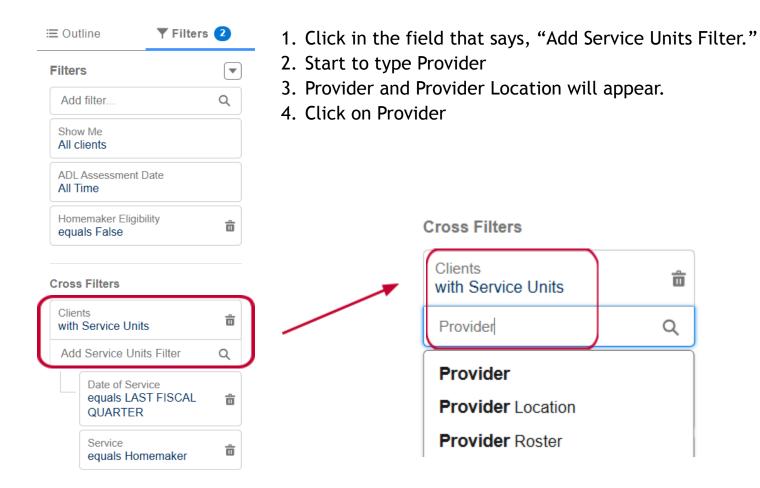
☰ Outline | ▼ Filters 2

Groups

▤ GROUP ROWS

Add group... 🔍

Columns ▼

Add column... 🔍

Client: SUDS Client ID ✕
Client Full Name ✕
Homemaker Eligibility ✕
Date of Birth ✕
Missing DOB? ✕
Calculated Age ✕
Missing Age? ✕
Last Service Date ✕
Services Received ✕
IADL Assessment Date ✕

Adding Provider to the Report

To filter on a specific Provider, you need to add another filter under the Cross Filters.

1. Click in the field that says, "Add Service Units Filter."
2. Start to type Provider
3. Provider and Provider Location will appear.
4. Click on Provider
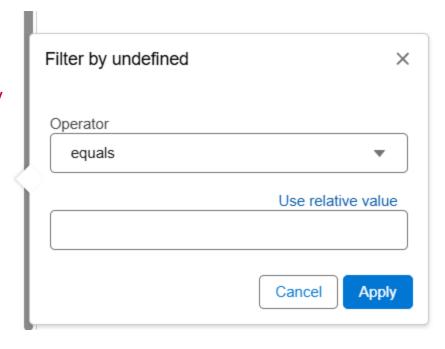
When you click on Provider, a new window appears asking for an Operator.

1. In the empty field, enter your Provider Name exactly as it appears in SUDS.
2. Sometimes, SUDS struggles with using equals. If you use equals and get no results, change the Operator to "Contains." This will probably help.

You are telling SUDS to show records for clients who received Homemaker services during the Last Fiscal Quarter and who do not have Homemaker eligibility.

3. Click Save and Run

Filter by undefined ✕

Operator

equals ▾

Use relative value

Cancel | Apply

Reading the Report

Your results are now focused on the Provider you specified in the filter. Going left to right, you will see the Client's SUDS ID, Name, and Homemaker Eligibility, which are all unchecked.

This is followed by our different age fields, so you can see if anyone happens to be under 60.

Report: Clients
Missing HM Eligibility Clients
Unique client records for clients who received HM units in the previous state fiscal quarter who do not meet HM Eligibility. To filter by provider, add a filter for

Total Records	Total Homemaker Eligibility	Total IADL Assessment Score
69	0	262

	Client: SUDS Client ID	Client Full Name		Homemaker Eligibility	Date of Birth	Missing DOB?	Calculated Age	Missing Age?
1	Client-00013026	LeeAnn L. Freeman		☐	10/20/1945	-	79	-
2	Client-00018758	Lynda M James		☐	6/5/1949	-	75	-
3	Client-00038818	Alva J. Vineyard		☐	7/19/1954	-	70	-
4	Client-00050408	Anthony Buxton		☐	5/20/1944	-	80	-
5	Client-00050533	Betty J Wriston		☐	5/17/1941	-	83	-
6	Client-00057879	Belva Woodend		☐	8/19/1932	-	92	-
7	Client-00058025	Candy Hudgeons		☐	2/11/1947	-	78	-
8	Client-00058192	Carl E Andersen		☐	9/15/1945	-	79	-
9	Client-00062196	Carol J Todd		☐	8/28/1940	-	84	-
10	Client-00062515	Carole M Benker		☐	3/16/1945	-	80	-
11	Client-00081668	Carol Gallegos		☐	5/9/1936	-	88	-
12	Client-00083584	Carolyn L Roome		☐	7/13/1956	-	68	-

If you scroll to the left, the fields used to determine Homemaker eligibility are listed. These fields help you figure out why someone is ineligible.

On the first row, the client has an IADL score above 2 and a cognitive impairment of "No." Since they need to have one or the other, the person is eligible based on their IADL score alone.

Why aren't they eligible? The Last IADL Assessment Date is from 1/16/2024, more than 13 months ago. Once the assessment is updated, the client will be eligible for Homemaker services.

IADL Assessment Date	IADL Assessment Score	In Home Assessment Date	Cognitive Impairment
1/16/2024	4	1/16/2024	No
5/2/2023	4	3/9/2023	Not Collected
1/22/2024	5	1/22/2024	Yes
2/12/2024	7	2/12/2024	Yes
7/13/2023	3	10/27/2021	No
2/12/2024	6	2/12/2024	No
5/17/2021	0	8/13/2020	No
5/11/2023	3	5/11/2023	Not Collected
7/26/2021	2	7/26/2021	No
12/4/2023	5	12/4/2023	No
6/1/2023	5	6/1/2023	Yes
7/12/2023	3	6/16/2022	No
4/29/2022	3	4/29/2022	No
10/18/2023	0	5/13/2019	-
5/11/2023	4	5/11/2023	Not Collected

IADL Assessment Date ▼	IADL Assessment Score ▼	In Home Assessment Date ▼	Cognitive Impairment ▼
1/16/2024	4	1/16/2024	No
5/2/2023	4	3/9/2023	Not Collected
1/22/2024	5	1/22/2024	Yes
2/12/2024	7	2/12/2024	Yes
7/13/2023	3	10/27/2021	No
2/12/2024	6	2/12/2024	No
5/17/2021	0	8/13/2020	No
5/11/2023	3	5/11/2023	Not Collected
7/26/2021	2	7/26/2021	No
12/4/2023	5	12/4/2023	No
6/1/2023	5	6/1/2023	Yes
7/12/2023	3	6/16/2022	No
4/29/2022	3	4/29/2022	No
10/18/2023	0	5/13/2019	-
5/11/2023	4	5/11/2023	Not Collected

Needs an updated assessment

Needs an updated assessment

Does not meet IADL or Cognitive Impairment criteria.

Does not meet IADL and the Cognitive Impairment answer is missing. An updated assessment would not be enough to make the client eligible.

Adding Filters for Date of Service: Relative Date

1. Return to the Filter section of the Report Builder.
2. Click on Date of Service equal LAST FISCAL QUARTER
3. You can use a relative date like LAST MONTH, LAST FISCAL YEAR, etc. Salesforce has a relative dates cheat sheet.
4. You can also enter a date range, but you'll need to add two filters to do this.

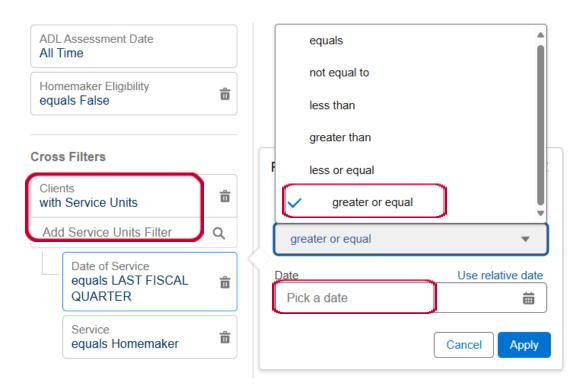1. Click on Date of Service equal LAST FISCAL QUARTER

2. Click Use Calendar Date above the date field

3. Change the Operator to "greater or equal." All records *on or after* this date will be in your results.

4. Repeat this Process. Enter Date of Service in the "Add Service Units Filter."

5. Select the less or equal option (see next page). All records *before* this date will be in your results.

6. This creates a date range for your report.

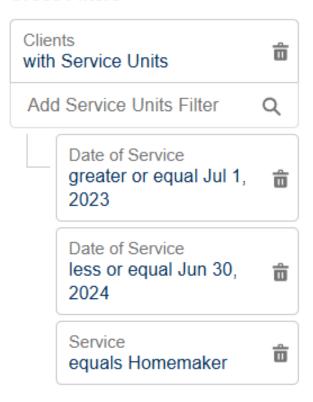This is how a date range for Date of Service looks once completed.

In this example, the date range is SFY2024.

1. Filter #1: Date of Service greater than or equal to 7/1/2023 (start date).

2. Filter #2: Date of Service less than or equal to 6/30/2024 (end date).

The remaining filter ensures that only clients who received Homemaker units are included in the report results.

The order of the filters does not matter.

Cross Filters

Clients
with Service Units 🗑

Add Service Units Filter 🔍

Date of Service
greater or equal Jul 1, 🗑
2023

Date of Service
less or equal Jun 30, 🗑
2024

Service
equals Homemaker 🗑

For all of these reports, the filters are doing all the work to ensure you pull in the right clients, but you will NOT see those fields on the report results. You need to trust that if you set up a cross filter, your added filters will focus your results on the correct clients. Unfortunately, you will not see the provider name, service, or date range in your report results.

Version Information

Coming Soon

SUDS Website: https://sudscolorado.org

SUDS Email:
CDHS_Sudshelpdesk@state.co.us

SUDS Quarterly Data Monitoring Guide

Version: 20250430_v2.0_QDM_Jones

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