



# SFY2025 Caregiver User Guide



**COLORADO**  
Office of Adult, Aging &  
Disability Services  
State Unit on Aging

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# Caregiver Updates



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Version 1.2



# SFY2025 Caregiver Updates

- **Caregiver Service Units:** You will only be able to record units against a client if they have a caregiver/care recipient relationship in SUDS.
  - Care Recipients **DO NOT** receive Caregiver Services
  - Agency Staff should **NEVER** be entered as a Care Recipient's Caregiver.
  - Care Recipients **CANNOT** be added to a Roster for a Caregiver Service or your roster will error out.
- **Caregiver Eligibility:** The SUA can only reimburse for services where the client served meets eligibility criteria. While eligibility between some Caregiver services may vary, establishing the Caregiver/Care Recipient Relationship is **REQUIRED** regardless of Caregiver Service.

# SFY2025 Caregiver Updates

**Caregiver Respite Monitoring:** Historically, there have been two ways to record Caregiver Monitoring, 1) Caregiver Material Aid (Monitoring Devices) or, 2) Caregiver Respite (Monitoring).


With the changes implemented to SUDS starting FFY2023, we instructed users to record monitoring under Caregiver Respite - Other Caregiver Respite. The SUA recently met to address this service “duplication,” it was determined that any services linked to a monitoring device should be recorded under Caregiver Material Aid, not Respite.

**If you are actively using Caregiver Respite - Other Caregiver Respite for monitoring services, please reach out to the SUDS Help Desk for unit correction and new service authorizations.**



# Understanding the Caregiver Banner

You may have noticed the addition of Caregiver and Care Recipient banners on client records:

 Client <b>Client-00341168</b>	<a href="#">Nutrition Screening</a>	<a href="#">NSIP</a>	
First Name	Last Name	Nickname	Status
<input type="text"/>			

**This client is a caregiver.**

This is a quick and easy way for you to know that a client is a Caregiver and may receive Caregiver services and units.

If you are working with a client who has this banner and is NOT a Caregiver - the Caregiver/Care Recipient Relationship should be reviewed and made inactive (when necessary). A Care Recipient CANNOT be a Caregiver.

If you are working with a client who should have this banner - once you add the Caregiver/Care Recipient Relationship, the banner will appear.

# Care Recipient is a Minor

- **Client is a Minor** is now a banner at the top of the screen if the client has a date of birth or age that is equal to or less than 18.
- Minor clients need to have a Full Name and Age in SUDS
- Demographics are NOT required when a client is a minor. You can collect this information if you want to. If you do not want to collect demographics, there is an option in each demographic field called, “Client is a Minor.” These will need to be selected in order to save the client record.
- When you add a client who is a minor to a Caregiver/Care Recipient Relationship, a checkbox will be checked to note the care recipient is a minor.

**Why does this matter to me?** We are required to report the number of children under 18 who are being cared for by a grandparent or other older relative.

# Creating Caregiver & Care Recipient Relationships



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# Creating a Caregiver/Care Recipient Relationship

For this example, we will be adding a Care Recipient to the Caregiver's Client record. This may also be done in reverse - you may go to a Care Recipient's Client record and add a Caregiver.

The Caregiver/Care Recipient cards are on the Client record between Contacts and the 2024 Federal Poverty Level (FPL) Guidelines.

On the **Caregiver's Client Record**: Click ▼ | New



# Data Requirements for the Caregiver & Care Recipient Relationship


**Caregiver:** Must have a client record. If you start creating the relationship from the Caregiver's Client Record, their Client ID will auto-populate like you see here.

**Care Recipient:** Must have a client record. From the Caregiver Client record, type in the name of the Care Recipient. If they do not have a Client record, one can be created from here by selecting New Client in the search results

Information

Caregiver / Care Recipient Relationship

\* Caregiver

 Client-00460668

\* Care Recipient

Search Clients...

# Data Requirements for the Caregiver & Care Recipient Relationship

**Caregiver Relationship to Care Recipient:** Define the relationship between the Caregiver and Care Recipient is required for our annual federal reporting.

Relationship Options: Husband, Wife, Domestic Partner, including Civil Union, Son/Son-in-Law, Daughter/Daughter-in-Law, Sister, Brother, Grandparent, Parent, Other Relative, Non-Relative

* Caregiver Relationship To Care Recipient	--None--
Other Relationship	

You may also write in a different relationship, if needed

# Eligibility Requirements for Caregiver/Care Recipient Relationships

**OAA Caregiver Services Eligibility:** Select the appropriate OAA Caregiver Eligibility category from the drop-down. You can only select one eligibility category. The SUA can only reimburse services where eligibility has k

\* OAA Caregiver Services Eligibility

--None--

✓ --None--

Family Caregiver of an older individual (age 60+)

Family Caregiver of an individual (age < 60) with Alzheimer's disease or related disorder

Grandparent/Older Relative Caregiver (age 55+) of a child (age < 18)

Grandparent/Older Relative Caregiver (age 55+) of an individual (age 18-59) with a disability

Caregiver is not eligible for OAA Title III-E Caregiver Services

**Units = Caregiver Services**

**Units = Grandparent Caregiver Services**

# Final Caregiver/Care Recipient Relationship on Client Records

**CAREGIVER:** After adding a Care Recipient in the Caregiver/Care Recipient Relationship, the Care Recipient will be listed in the Client's Care Recipient card on their Client record (Caregiver)

**CARE RECIPIENT:** After adding the Caregiver/Care Recipient Relationship, the Caregiver will be listed in the Client's Caregivers card on their Client Record (Care Recipient)

This screenshot shows a software interface for a client's record. At the top, there is a header 'Client's Care Recipient(s) (1)' with a green icon of two hands shaking and a dropdown arrow. Below this, a card for 'CareR-00051' is visible. A red box highlights the relationship details: 'Care Recipient...' followed by 'Leia Skywalker' and 'Care Recipient:' followed by the link 'Client-00499036'. Below this card, another header 'Client's Caregiver(s) (0)' is visible.

This screenshot shows a software interface for a client's record. At the top, there is a header 'Client's Care Recipient(s) (0)' with a green icon of two hands shaking and a dropdown arrow. Below this, a card for 'CareR-00051' is visible. A red box highlights the relationship details: 'Caregiver Na...' followed by 'Lucas P Skywalker' and 'Caregiver:' followed by the link 'Client-00499035'. Below this card, another header 'Client's Caregiver(s) (1)' is visible.

# Updating Caregiver & Care Recipient Relationships



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# Updating a Caregiver & Care Recipient Relationship

If a client is no longer a Care Recipient's Caregiver, the Caregiver/Care Recipient Relationship should be made Inactive. NEVER delete a relationship.

To make the Relationship Inactive, navigate to the Caregiver/Care Recipient Relationship card on the Caregiver's record.

1. Click the Caret
2. Click Edit
3. Navigate to Status
4. Click Inactive

<b>3</b>	Status
	Is Primary
	Could Not Get Missing Information ⓘ
	Comments

Client's Care Recipient(s) (1)

CareR-00001  
Care Recipient...  
Care Recipient: Client-004

View All

Edit  
Delete

Client's Caregiver(s) (0)

Active  
--None--  
✓ Active  
Inactive

# Finding Inactive Relationships

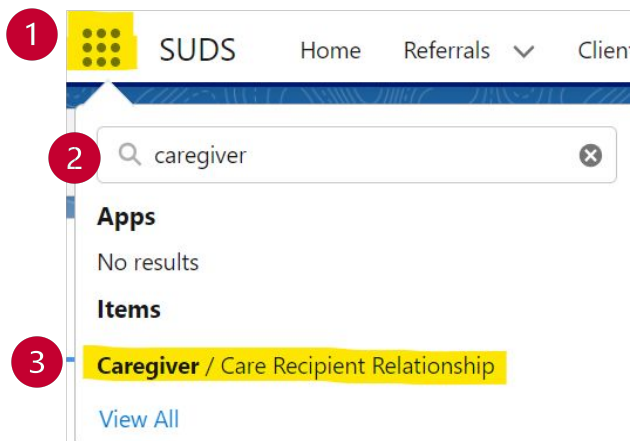




# Finding Inactive Caregiver/Care Recipient Relationships

If you primarily work with Caregiver and Care Recipient, it might be helpful to add the Caregiver/Care Recipient Relationship Tab to your Navigation Bar. To do this, follow these steps:

1. Click the App Launcher
2. Type in Caregiver
3. Select Caregiver/Care Recipient Relationship
4. This will open the Caregiver/Care Recipient Relationship Tab on your Navigation Bar (not shown)
5. Change the List View to All Caregiver Care Recipient Relationships – this will display all relationships regardless of their status



# Caregiver Assessments



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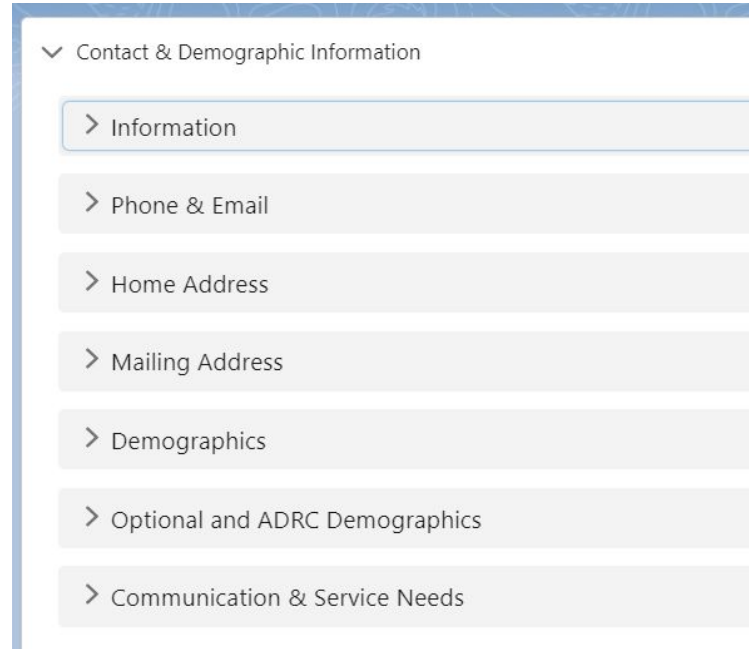


# Entering Caregiver Assessment Information in SUDS

Standard SUA Caregiver Counseling/Training/Support Groups Assessment

## Assessment Form Page 1: Caregiver Contact and Demographic Information (See Below)

This information is added to SUDS on the Client record.



▼ Contact & Demographic Information

- > Information
- > Phone & Email
- > Home Address
- > Mailing Address
- > Demographics
- > Optional and ADRC Demographics
- > Communication & Service Needs



# Entering Caregiver Assessment Information in SUDS

## Assessment Form Page 1: Caregiver Demographic Information (See Below)

Demographics

Gender

Gender not listed ⓘ

Ethnicity

Race

Race not listed ⓘ

Living Situation

Household Size ⓘ

Poverty ⓘ

Geography ⓘ

This is entered on the Caregiver's Client record in SUDS.

**Remember! These demographic questions are about the Caregiver, **NOT** the Care Recipient.**

The SUA is required to report aggregate demographic information about the **Caregivers** we serve to the Administration on Community Living (ACL). If a **Caregiver** refuses to answer or doesn't know the answer, please use these options in SUDS (**Client Refused, Client Doesn't Know**). If you did not collect the information, please enter **Not Collected**.

# Entering Caregiver Assessment Information in SUDS

## Assessment Form Page 1: Caregiver Contact Information

This is also entered on the Client record in SUDS.

The main requirement is **Zip Code**, which helps us report urban vs. rural geography in federal reporting to ACL.

It is important to enter the **Caregiver's** contact information accurately to avoid bad addresses and returned mail.

▼ Home Address

Home Address Line 1

Home Address Line 2 ⓘ

Home City

Zip

Missing Zip Code? ⓘ

County

State

Home Location Notes ⓘ

# Entering Caregiver Assessment Information in SUDS

## Assessment Form Page 2: Communication & Service Needs

This is entered on the Caregiver's client record in SUDS under the Communication & Service Needs section.

### Assessment Form:

#### Communication & Service Needs:

Would you like to hear about other services?  Yes  No  
If yes, how can we contact you?  Email  Mail  Phone

### SUDS:

Would Like To Hear About Other Service

How Can We Contact You?

# Entering Caregiver Assessment Information in SUDS

## Assessment Form Page 2 - Caregiver/Care Recipient Relationship Information.

This gets entered on the Care Recipient's Client record and the Caregiver Relationship screen in SUDS.

Use the **Care Recipient's** Information to create the **Care Recipient's** Client record in SUDS.

**Caregiver/Care Recipient Relationship Information:**

Please provide information for each individual care recipient you care for:

**Care Recipient Information:**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

Lives with caregiver?  Yes  No (if no, please provide their home address)

Home Address Line 1: \_\_\_\_\_

Line 2 (Apt/Unit/Floor #): \_\_\_\_\_ City: \_\_\_\_\_

Zip: \_\_\_\_\_ County: \_\_\_\_\_ State: \_\_\_\_\_

Use the **Caregiver's Relationship to Care Recipient** and the **Caregiver Services Eligibility** information to create the **Caregiver Relationship** in SUDS.

**Caregiver's Relationship to Care Recipient:**

Husband  Wife  Domestic Partner

Son/Son-in-Law  Daughter/Daughter-in-law  Sister

Brother  Grandparent  Parent

Other Relative: \_\_\_\_\_

Non-Relative: \_\_\_\_\_

Caregiver Services Eligibility:	
<b>Family Caregiver of an Older Adult</b> <input type="checkbox"/> An adult (18 years of age or older) family member or another individual (e.g., friend or neighbor) who is an informal (i.e., unpaid) provider of in-home or community care to the Care Recipient	<b>Care Recipient</b> <input type="checkbox"/> An older individual (60 years of age or older) or <input type="checkbox"/> An individual (age < 60) with Alzheimer's disease or related disorder with neurological and organic brain dysfunction
<b>Older Relative Caregiver/Grandparent of a Child</b> <input type="checkbox"/> A grandparent, step-grandparent, or other older relative of the child by blood, marriage, or adoption who is at least 55 years old living with the child, and identified as the primary caregiver through a legal or informal arrangement	<b>Care Recipient</b> <input type="checkbox"/> A child (less than 18 years old) or <input type="checkbox"/> An individual (18 to 59 years old) with a disability

# Entering the Caregiver & Care Recipient Relationship in SUDS

## Assessment Form:

### Caregiver's Relationship to Care Recipient:

<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Domestic Partner
<input type="checkbox"/> Son/Son-in-Law	<input type="checkbox"/> Daughter/Daughter-in-law	<input type="checkbox"/> Sister
<input type="checkbox"/> Brother	<input type="checkbox"/> Grandparent	<input type="checkbox"/> Parent
<input type="checkbox"/> Other Relative:	_____	
<input type="checkbox"/> Non-Relative:	_____	



### SUDS:

\* Caregiver  
Relationship To  
Care Recipient  
  
Other Relationship

--None--

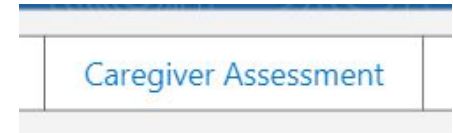


# Entering Caregiver Assessment Information in SUDS

## Caregiver Respite/Supplemental Services/Case Management Assessment Only

Caregiver Assessment Form Page 3: The Additional Questions are entered on the Caregiver Assessment Screen in SUDS

Click on the **Caregiver Assessment** button at the top, right-hand side of the Client's record to complete the Additional Questions section.



See below for the paper sample of the Caregiver Assessment Additional Questions

# Entering Caregiver Assessment Information into SUDS

## Caregiver Respite/Supplemental Services/Case Management Assessment Only

Assessment Form Page 3: The Additional Questions are entered on the Caregiver Assessment screen in SUDS

### Assessment Form:

#### Caregiver Assessment - Additional Questions:

Which types of caregiver services are you interested in? Select all that apply:

- Information about services
- Counseling
- Education/Training
- Support Groups
- Meals (delivered to your home or dining at a community site)
- Transportation
- Supplies to assist with caregiving duties (e.g. food, assistive devices)
- Respite Care (in-home or out-of-home supports/arrangements to provide caregivers temporary break from caregiving duties)
- Adult day care programs for care recipients
- Resources for grandparents raising grandchildren
- Other (please explain): \_\_\_\_\_

### SUDS:

Which caregiver services are you interested in? Select all that apply:

- Information about services
- Counseling
- Education/Training
- Support Groups
- Meals (delivered to your home or dining at a community site)
- Transportation
- Supplies to support caregivers and assist with caregiving duties (e.g. food, assistive devices)
- Respite Care (in-home or out-of-home supports/arrangements to provide caregivers a temporary break from caregiving duties)
- Adult day care programs for care recipients
- Resource grandparents raising grandchild
- Other (please explain)

Interest in Other Caregiver Services

# Entering Caregiver Assessment information into SUDS

## Caregiver Respite/Supplemental Services/Case Management Assessment Only

Caregiver Assessment Form Page 3: Additional Questions are entered on the Caregiver Assessment screen in SUDS

### Assessment Form:

What type(s) of assistance do you provide to the care recipient? Select all that apply:

- |   |  |
|---|--|
| <input type="checkbox"/> Hygiene (bathing, grooming, etc.)            | <input type="checkbox"/> Transportation                          |
| <input type="checkbox"/> Dressing                                     | <input type="checkbox"/> Errands/Shopping                        |
| <input type="checkbox"/> Eating/Feeding                               | <input type="checkbox"/> Maintenance of Home/Yard                |
| <input type="checkbox"/> Meal Preparation                             | <input type="checkbox"/> Housekeeping and Laundry                |
| <input type="checkbox"/> Using the bathroom/incontinence              | <input type="checkbox"/> Managing Finances/Paying Bills          |
| <input type="checkbox"/> Getting around the home                      | <input type="checkbox"/> Administering Medication                |
| <input type="checkbox"/> Getting in/out of beds and chairs            | <input type="checkbox"/> Medical Treatment/Managing Condition(s) |
| <input type="checkbox"/> Other (please explain): <input type="text"/> |  |

Are you getting help from anyone with your caregiver duties?

- Yes - professional/paid (formal) help  
 Yes - informal help  
 Yes - both formal and informal help  
 No

### SUDS:

▼ Caregiver's Duties & Employment Status

Caregiver Duties: What type(s) of assistance do you provide to the care recipient? Select all that apply:

- Hygiene (bathing, grooming, etc.)  
 Dressing  
 Eating/Feeding  
 Meal Preparation  
 Using the bathroom/incontinence support  
 Getting around the home  
 Getting in/out of beds and chairs  
 Transportation  
 Errands/Shopping  
 Maintenance of Home/Yard  
 Housekeeping and Laundry  
 Managing Finances/Paying Bills  
 Administering Medication  
 Medical Treatment/Managing Medical Condition(s)  
 Other

Other Caregiver Duties Comment:

Caregiver Other Help: Are you getting help from anyone with your caregiver duties?

- No  
 Yes--Professional/Paid help  
 Yes--Informal help  
 Yes--both formal and informal help

# Caregiver/Grandparent Caregiver Considerations



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# Caregiver & Care Recipient Relationship Considerations

- Additional guidance for the creation of client and assessment records for care recipients will be available pending SUA policy decisions specific to grandchildren.
- Please continue to follow existing guidance in these areas. Instructions are available on the Caregiver Assessment forms provided by the SUA. Requirements for Care Recipient assessments are also listed in the [Service Definitions and Reporting Requirements Guide](#).
- For Title III-E Caregiver Services, the **Caregiver** is the client. For every **Caregiver**, there must be a link to a **Care Recipient** in SUDS. You can use the information provided about the **Care Recipient** in the **Care Recipient** information section of the Caregiver Assessment forms to create a **Care Recipient** client record in SUDS.
- Adult **Care Recipients** of **Caregivers** receiving the **Caregiver** Services listed above need an In-Home Assessment, which can be completed from the client record as well.

# Managing Caregiver/Care Recipient Relationships With Reports

The **Reports** listed below can be found in the **All Users Report Templates** folder in SUDS. Please see the **SUDS All Users Report Templates Guide** for more information about accessing and modifying these reports to meet your needs. Click [HERE](#) to view the guide.

Report Template Name	Report Description
Missing Caregiver Assessment	Active clients who have received at least 1 service requiring a Caregiver Assessment, but the client is missing the Caregiver Assessment.  Add/Adjust Filters on Service Name, Provider/Provider Location, or other fields to see specific clients.
Missing Caregiver Relationships	Active clients who have received Caregiver Services requiring a Caregiver/Care Recipient Relationship where that linkage is missing.

# You Have Help



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# SUDS Website: [sudscolorado.com](https://sudscolorado.com)

## What You'll Find Here:

- **Videos of SUDS Trainings** and any associated materials/guides
- Recent updates announced by the SUDS Data Team
- SUDS Admin functions like requesting new user, adding or updating providers, service authorizations, etc.
- Copies of current assessment forms



# SUDS Help Desk

**All SUDS technical support requests should be sent to:**

**cdhs\_sudshelpdesk@state.co.us**



If you feel you have come across a bug in SUDS, please send as much detail as possible in your email including:

- ✓ Date and Time
- ✓ Record number, if applicable
- ✓ Detailed information about the error, including the screen or task you were performing

“I just finished creating record OMB-#### and when I clicked ‘Upload Files’ in the ‘Files’ window, I received an error message that said...”

- ✓ If possible, include a screenshot of the error you are experiencing

