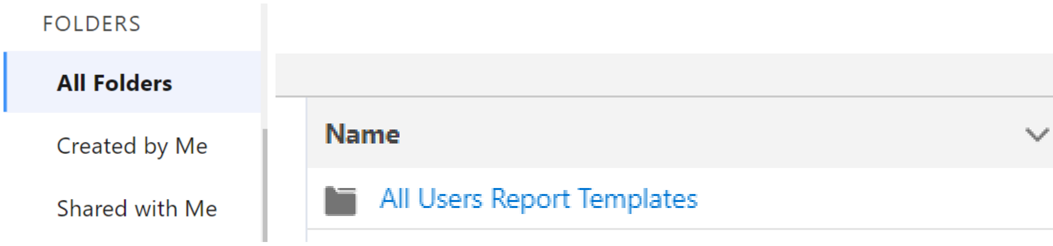
# SUDS All Users Report Templates Guide

If you have questions after reviewing this guide please contact the SUDS Help Desk: cdhs_sudshelpdesk@state.co.us

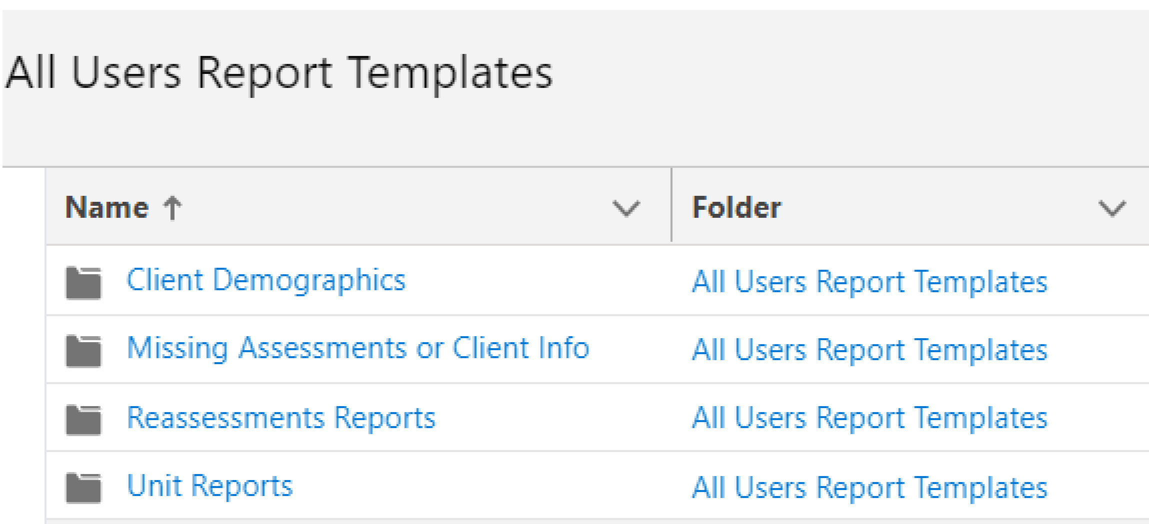
Last Updated: 10/26/2023

## Where do I find Report templates created by the SUDS Data Team?

1. Go the Reports tab in SUDS
2. On the left side panel, under FOLDERS, click on All Folders or Shared with Me
3. Find the folder called **All Users Report Templates** and click on the hyperlinked folder name




4. Once you are in the All Users Report Templates folder, you will report sub-folders by report category:
   - Client Demographics
   - Missing Assessments or Client Info
   - Reassessments Reports
   - Unit Reports




5. To get into the report sub-folders, you need to click on the hyperlinked sub-folder Name. Example: To get to the Client Demographics report templates, click on the word Client Demographics in the Name column

## What types of report templates are available?

As a starting place, we have the following report templates available for you (more soon!).

Client Demographics

| Report Name | Description |
|---|---|
| **Client Poverty Status** | Clients who have received services in past year by Poverty. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Gender** | Clients who have received services in past year by Gender. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Ethnicity** | Clients who have received services in past year by Ethnicity. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Race** | Clients who have received services in past year by Race. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Geography (Rural)** | Clients who have received services in past year by Geography (Urban/Rural based on zipcode). Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Living Situation** | Clients who have received services in past year by Living Situation. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Ethnicity and Race** | Clients who have received services in past year by Ethnicity and Race. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Age** | Clients who have received services in past year by Age Category. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Marital Status** | Clients who have received services in past year by Marital Status. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client County** | Clients who have received services in past year by County. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |

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|---|---|
| **Client Veteran Status** | Clients who have received services in past year by Veteran Status. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program-specific data |
| **Client Household Size** | Clients who have received services in past year by Household Size. Adjust Date of Service Filter as needed. You can add Service, Provider, or other criteria to Clients with Service Unit Cross Filter for program specific data |
| **Client Rural OAA Targeting** | Clients age 60+ who have received registered services in past SFY by Geography (Urban/Rural based on zip code). Used for OAA Targeting performance measure for AAAs |
| **Client Poverty OAA Targeting** | Clients age 60+ who have received registered services in past SFY by Poverty Status. Used for OAA Targeting performance measure for AAAs |
| **Client Ethnicity and Race OAA Targeting** | 60+ Clients received registered services in past year by Ethnicity and Race. Used for OAA Targeting Performance Measure: Asian American, Black or African American, Hispanic or Latino, Native Hawaiian and Pacific Islander, American Indian and Alaska Native. Used for OAA Targeting for AAAs. |

## Missing Assessments or Client Info

| **Report Name** | **Description** |
|---|---|
| **Active Clients w/ Missing Demographics** | Active clients (served all time), missing info for at least 1 demographic field on the client profile, add Provider Name and Service type to Clients with Service Units cross filter as needed |
| **Active Clients Missing Demo Reg Only** | Active Clients who received registered services in the past year, missing info for at least 1 demographic field on the client profile. Add Provider Name and adjust service filter in Clients with Service Units cross filter as needed |
| **Missing ADL Assessment** | Active clients who have received at least 1 service requiring an ADL assessment but client is missing ADL assessment. Add Service, Provider, or other sub-filters to Clients with Service Units cross filter to see specific clients. |
| **Missing IADL Assessment** | Active clients who have received at least 1 service requiring an IADL assessment but client is missing IADL assessment. Add Service, Provider, or other sub-filters to Clients with Service Units cross filter to see specific clients. |
| **Missing Nutrition Assessment** | Active clients who have received at least 1 service requiring a nutrition assessment but client is missing nutrition assessment. Add Service, Provider, or other sub-filters to Clients with Service Units cross filter to see |

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| | specific clients |
| **Missing NSIP Eligibility Assessment** | Active clients who have received at least 1 service requiring NSIP Eligibility assessment but client is missing NSIP Eligibility assessment. Add Service, Provider, or other sub-filters to Clients with Service Units cross filter to see specific clients |
| **Missing Caregiver Assessment** | Active clients who have received at least 1 service requiring Caregiver assessment but client is missing Caregiver assessment. Add or Adjust Service, Provider, or other sub-filters to Clients with Service Units cross filter to see specific clients |
| **Missing Caregiver Relationships** | Active clients who have received Caregiver Services requiring a Caregiver/Care Recipient Relationship with a linked care recipient client record and are missing a Caregiver/Care Recipient Relationship |
| **Missing In Home Eligibility Assessment** | Clients who have received at least 1 service requiring an In Home Eligibility assessment but client is missing In Home Eligibility assessment. Add Service, Provider, or other sub-filters to Clients with Service Units cross filter to see specific clients. |

## Reassessments

| **Report Name** | **Description** |
|---|---|
| **ADL Reassessment Due** | Clients who have received at least 1 service requiring an ADL reassessment and client is (over)due for ADL reassessment. AAA Admins - Add Service and Provider Name sub-filter to Clients with Service Units cross filter to see a specific program's clients. |
| **ADL Reassessment Due w/ Units** | Clients who have received at least 1 service requiring an ADL reassessment in past year and are missing ADL reassessment. Shows client's unit history for reassessment-required services to help identify clients no longer active for those services |
| **IADL Reassessment Due** | Clients who have received at least 1 service requiring an IADL reassessment and client is (over)due for IADL reassessment. AAA Admins - Add Service and Provider Name sub-filter to Clients with Service Units cross filter to see a specific program's clients |
| **IADL Reassessment Due w/ Units** | Clients who have received at least 1 service requiring an IADL reassessment in past year and are missing IADL reassessment. Shows client's unit history for reassessment-required services to help identify clients no longer active for those services |
| **In Home Elig Reassessment Due w/ Units** | Clients who have received at least 1 service requiring an In Home Eligibility reassessment in past year and are missing reassessment. Shows client unit history for reassessment-required services to help identify clients no longer active for those services |

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|---|---|
| **In Home Eligibility Reassessment Due** | Clients who have received at least 1 service requiring an In Home Eligibility reassessment and client is (over)due for reassessment. AAA Admins - Add Service and Provider Name sub-filter to Clients with Service Units cross filter to see specific clients |
| **Nutrition Reassessment Due** | Clients who have received at least 1 service requiring an nutrition reassessment and client is (over)due for reassessment. AAA Admins - Add Service and Provider Name sub-filter to Clients with Service Units cross filter to see a specific program's clients |
| **Nutrition Reassessment Due w/ Units** | Clients who have received at least 1 service requiring a nutrition reassessment in past year and are missing nutrition reassessment. Shows client unit history for reassessment-required services to help identify clients no longer active for those services |

Units

| Report Name | Description |
|---|---|
| **Units by Location, Service, Record Type** | Unit Reports for Provider Agencies - If you are a provider, you should the units for your provider agency only. If you see other provider or regional information, please email SUDS HelpDesk to report a bug. |
| **Units Entered Today** | All Units entered for your agency/region with created date = TODAY. Grouped by who entered the units, service, unit entry type (single client, roster, aggregate). Check this report if you are worried your units didn't save before re-entering units. |
| **Monthly Units and Clients - Current SFY** | Total Units, Registered Clients, and Estimated Clients for reimbursed service categories by Location and Month. Date of Service filter = Current State Fiscal Year (July 1 - June 30). Does not include units w/ LOCAL- Not OAA/SFSS Funded delivery method |
| **Guest Meal Counts by Month** | Guest Meal Counts by Provider, Provider Location (Meal Site), and Month for the Current State Fiscal Year. Guest meals must be entered in SUDS as as a sub-type of Ineligible Congregate Meals or Ineligible Home Delivered Meals using Aggregate Unit Entry |
| **All Meal Services Meal Site Report** | Total Congregate Meals and Clients by Provider Location (meal site), Service, and Meal Type (Service Sub-Type), Date of Service Filter = Last Month. Adjust the Date of Service filter as needed |
| **Client Last Name, First Name and Units** | List of service units with Client Last Name, First Name Middle Name as one field. You can add filters for a specific provider, provider location, roster, service, or other information to filter down the list. Date of Service filter = LAST MONTH. You can change the date of service filter. |
| **Current SFY Clients Served by Month** | Unduplicated registered clients served by calendar month for the current State Fiscal Year. You will only see clients served by the provider agency or agencies you work with in SUDS |

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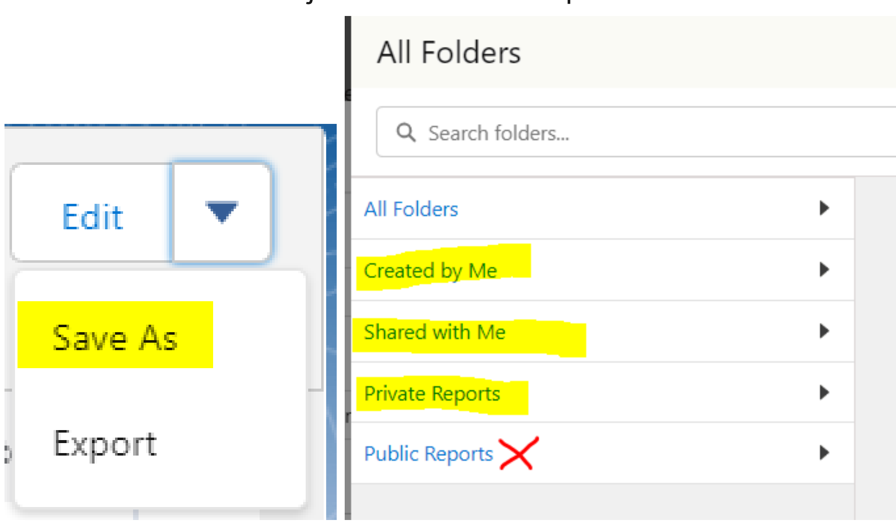
|---|---|
| **YTD Summary by Provider** | Total Units, Unduplicated Registered Client Count, and Estimated Client Count by Provider, Service, and Month. Date of Service filter = Current State Fiscal Year (July 1 - June 30). This report uses AAS Service so vouchers and direct services are grouped under the same service name. |
| **YTD CBRES Service Summary by Provider** | Total Units, Unduplicated Registered Client Count, and Estimated Client Count by Provider, Service, and Month. Date of Service filter = Current State Fiscal Year (July 1 - June 30). This report uses CBRES Service Name and excludes LOCAL delivery method |
| **Active Service Authorizations** | Report for checking the service authorizations that are active for your provider agency or your region. |
| **Active Rosters** | Report on rosters currently active for your provider agency or your region. |

## How do I save a copy of the report template to my own report folder?

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




## How do I download a copy of the report to Excel?

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

## How do the reports work? What data will I see?

These reports should only show you unit information that you are allowed to have access to:

- **Unit History Data:** Every user in SUDS gets added to one or more Providers in Admin Dashboard by the SUDS Data Team. This lets the user see all the unit history and rosters for the provider.
- **Clients/Assessments/Reassessments:** The All Users Report Templates also filter client-related reports by unit history. This means the clients you see in the reports have received service units from the Provider or Providers you are assigned to see in SUDS.

How this works by user type:

- If a **Provider user** runs any of the All Users Report Templates in SUDS, they will see only the clients who received services from their specific Provider agency and/or units tied to their specific Provider agency. If their provider agency provides more than 1 service that gets entered into SUDS, the user may need to additional filters to the report to see clients for a specific program, location, etc. See "How do I make adjustments to the Reports" instructions below.
- If a **AAA Regional admin user** runs any of the All Users Report Templates, they will see all clients served by all of their region's providers. If you want to see information for a specific provider in your region, you need to add a Provider filter to get the specific clients that a Provider served. See "How do I make adjustments to the Reports" instructions below.

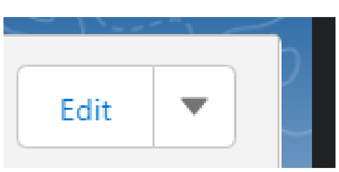
## How do I make adjustments to the Reports?

First, follow the instructions above on **how to save a copy of the report template in your own report folder**. You cannot make any adjustments to the report until you save your own copy.

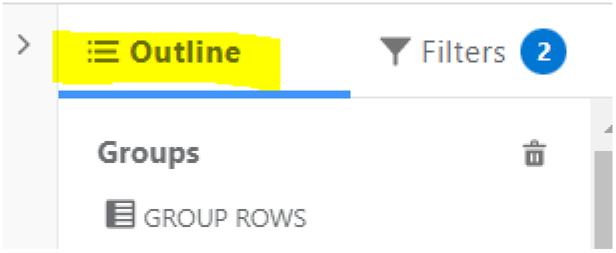
### Adding information to the report:

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

1. Open the report that you saved to your folder.
2. Click on Edit (top right of your screen). This will open the report allowing it to be edited.



3. This will take you to the Outline screen, where you can change or add to the Group Rows, Group Columns, and Columns shown in the report.




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

## Adjusting Cross Filters on Client Demographics, Missing Assessments, and Reassessment Due Reports:

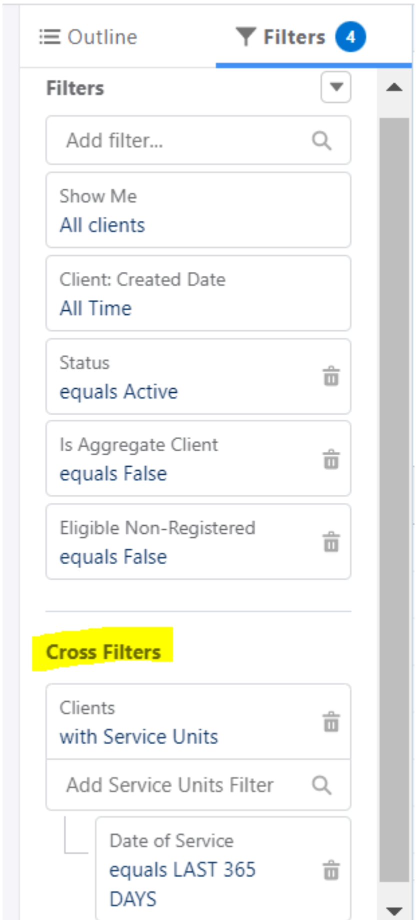
### Where do I adjust the parameters on the reports in the Client Demographics, Assessments or Client Info, Reassessments folder?

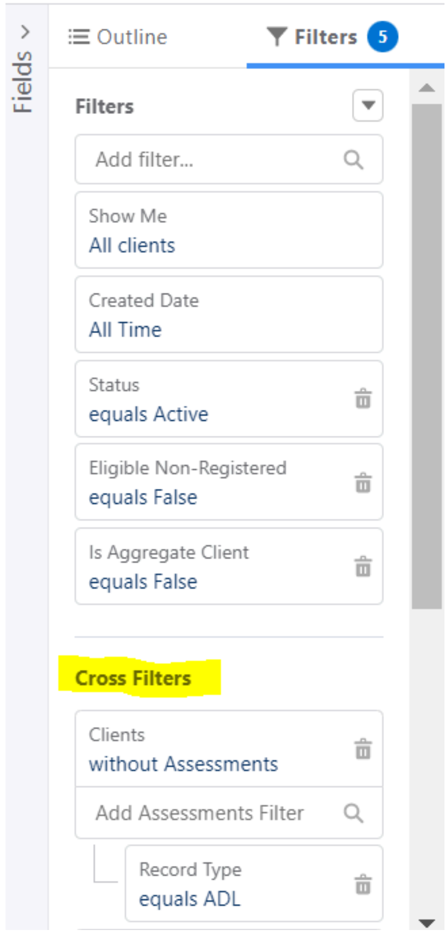
The reports in the Client Demographics, Assessments or Client Info, Reassessments folders use Cross Filters, a special type of filter in Salesforce reports. Here is the link to the Salesforce help page on Cross Filters if you would like to learn more. Cross Filters are different than the standard report Filters. The Cross Filters in these reports help to provide us with unduplicated lists of clients based on the clients' unit history and/or assessments. They can also be used for Clients with and without caregiver/care recipient relationships.

### Where do I find the Cross Filters in the reports?

On reports with Cross Filters, when you click on the Filters tab on the left hand side of the report edit screen, you will see **Filters** and **Cross Filters.** To avoid creating duplication of the clients listed in the report, it is important to adjust the Clients with Service Units, Clients with Assessments, or Clients without Assessments **Cross Filters.** Information on how to adjust

Cross Filters are included in this guide. See the images of where to find the **Cross Filters:**

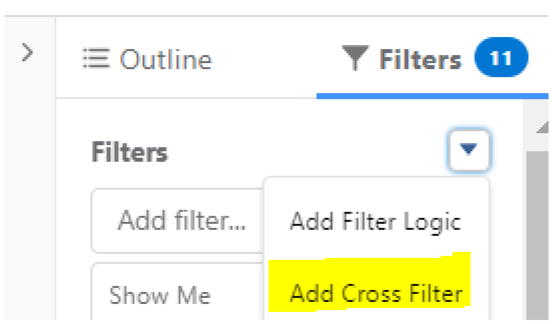


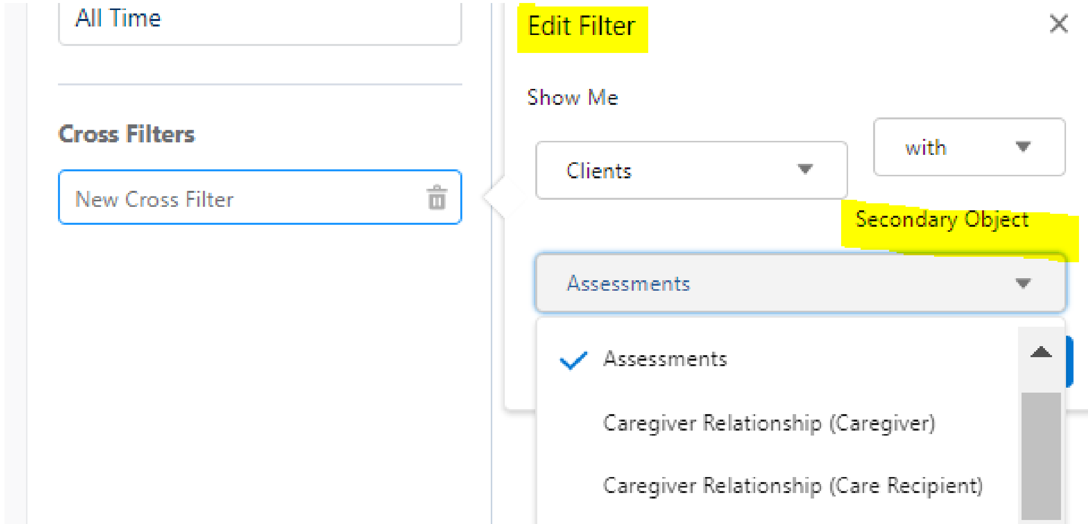

## How do I add a cross filter to a report I am creating?

**Add a Cross Filter:**

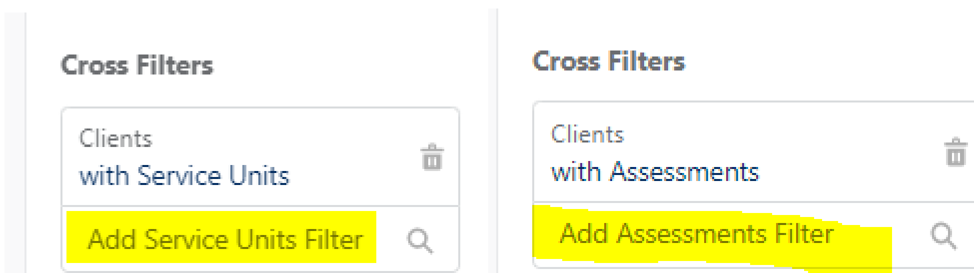
1. Edit or create a report.
2. From the FILTERS tab on the left hand side of the report edit screen, click on the down arrow at the top  and select Add Cross Filter:



3. An Edit Filter box will appear, where you can select to see Clients with or without related records from another part of SUDS (Secondary Object), such as Assessments, Service Units, and Caregiver/Care Recipient Relationships.




4. Click Apply and then click Refresh your report. A box will for the cross filter you added; You can then add "sub-filters" to the CrossFilter. These sub-filters allow you to further filter the list of clients based on information from their Assessments or Service Units (aka the "Secondary Object).
   a. In the box for the Cross Filter, there is a search bar that will say Add Service Units Filter or Add Assessments Filter:



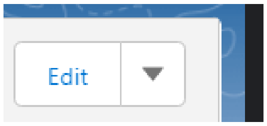

5. See more instructions on how to add specific sub-filters below.

## Adding sub-filters to the Cross Filters:

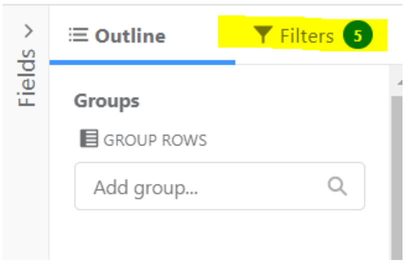
### Provider: I want to see the information for a specific provider:

You can add a Provider sub-filter to the Clients with Units Cross-Filter to the report for a specific Provider. (This applies only to AAA Regional Admin and AAA Staff users who have access to see more than 1 provider)

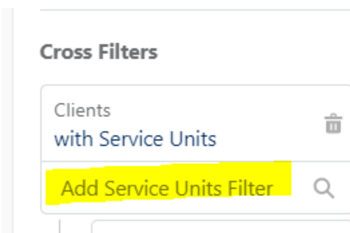
1. Open the report that you saved to your folder.
2. Click on Edit (top right of your screen). This will open the report allowing it to be edited.

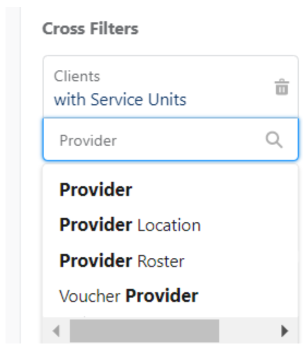



3. Next, click on Filters (top left of your screen).

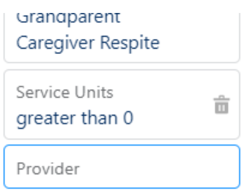


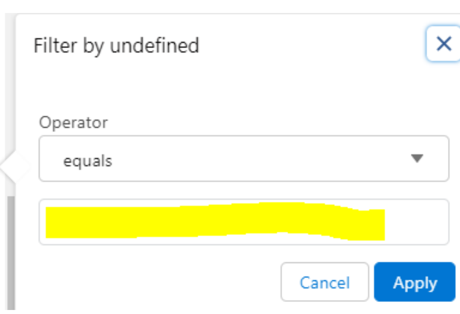

4. Next, under the Cross Filters section, click into Add Service Units Filter and search for "Provider."



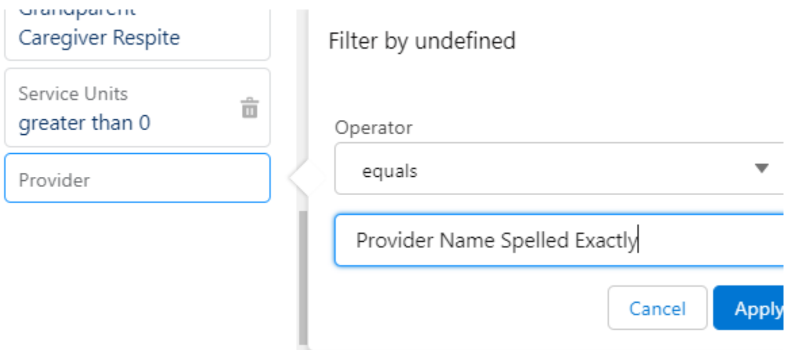




5. Click on "Provider" which will add a Provider box.

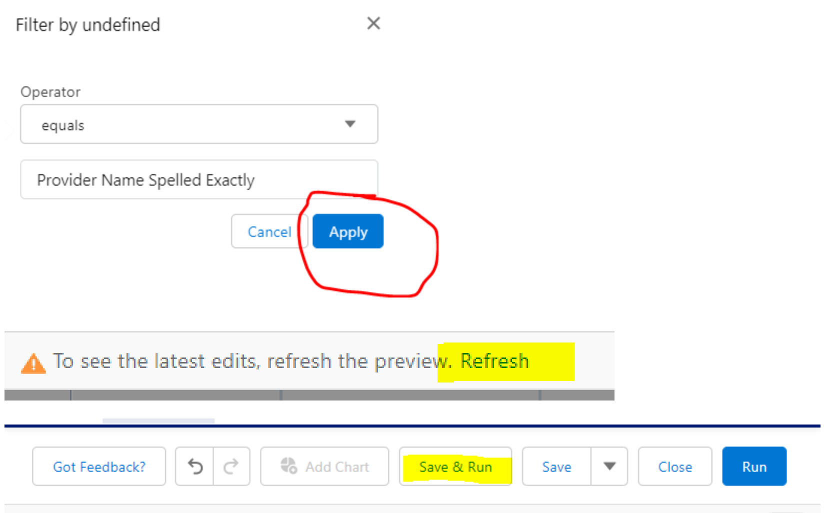



6. Click into the box under Equals and enter the Provider name exactly as it is named in SUDS. If your provider's name has a comma in it (e.g. Meals on Wheels, Inc.), you need to put double quotation marks around the providers name in the box, like this: **"**Meals on Wheels, Inc.**"** Or you need to change the Operator from equals to contains and type in part of the provider name (e.g. contains Meals on Wheels)



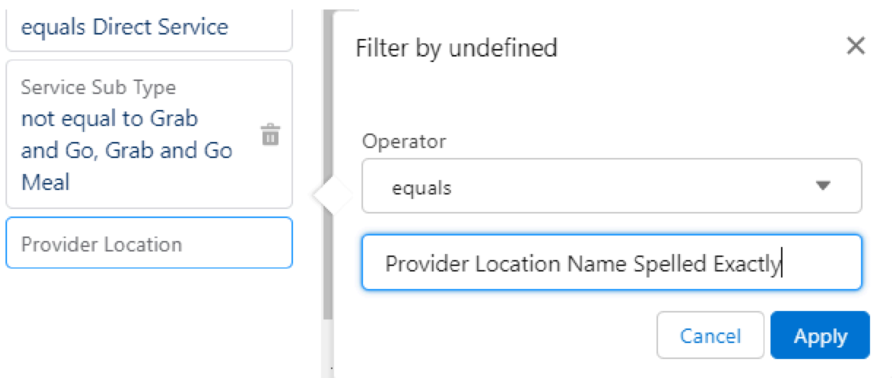

7. Then click Apply, then Refresh, and finally, Save and Run. Your report is now generated!




8. From the Report run screen, you can click Save As from the Edit drop down list to save a copy for each Provider, you will then edit the copy and update the provider's name in the Provider filter you created

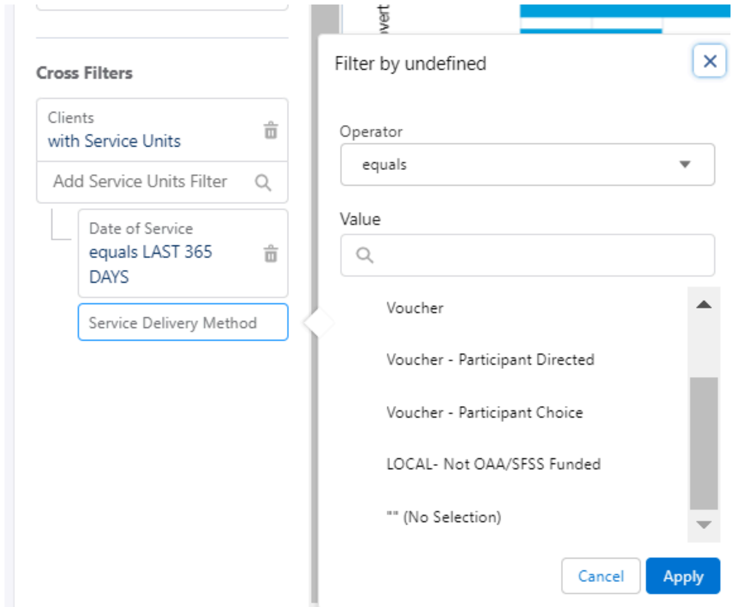
Provider Location: I want to see information by Provider Location (e.g. Meal Site):

1. Under the Cross Filters section, click into Add Service Units Filter and search for "Provider Location"
2. Click on Provider Location, which will add a Provider Location box
3. Click into the box under Equals and enter the Provider Location name exactly as it is named in SUDS
4. Then click Apply, then Refresh, and finally, Save and Run. Your report is now generated!
5. From the Report run screen, you can click Save As from the Edit drop down list to save a copy of the report for each meal site (Provider Location), you will then edit the copy and update the provider location's name in the Provider Location filter you created

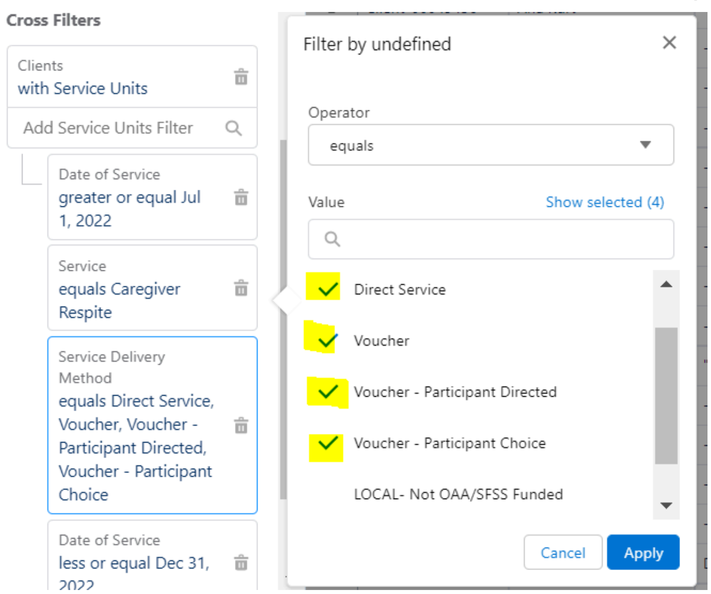



Service Delivery Method: My agency or region provides the same service as a voucher and a direct service, I need separate reports for the different delivery methods:

1. Add a Service Delivery Method sub-filter under the Clients with Services Units Cross Filter



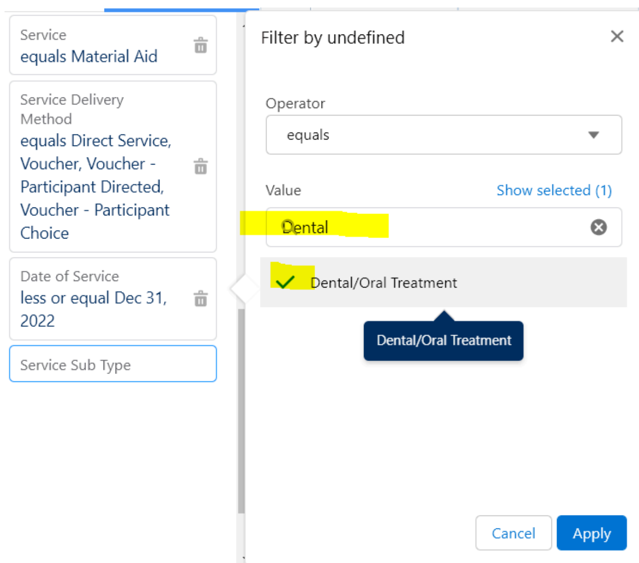

2. Click on the service delivery methods values to adjust what is shown in the report. If it has a checkmark next to it, it will be *included* in the report filter.




3. Then click Apply, then Refresh, and finally, Save and Run. Your report is now generated!
4. From the Report run screen, you can click Save As from the Edit drop down list to save a copy of the report for each service delivery method you offer for the service. You will then edit the copy and update the service delivery method filter selection

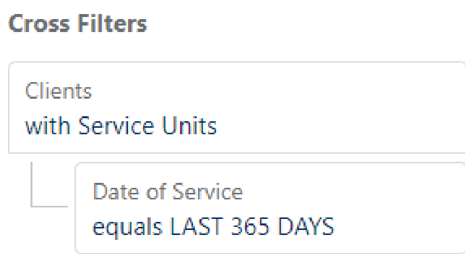
Service Sub Type: My agency or region provides multiple service sub-types for the same (e.g. different types of meals, material aids, rides) and I want to see the report for the specific service sub-type:

1. Add a Service Sub Type filter under the Clients with Services Units Cross Filter
2. Search for the Service Sub Type you are looking for by typing the sub type into the Value box
3. Click on the Service Sub Type to add it to the filter criteria.
4. Then click Apply, then Refresh, and finally, Save and Run. Your report is now generated!
5. From the Report run screen, you can click Save As from the Edit drop down list to save a copy of the report for each service sub type you offer for the service. You will then edit the copy and update the service sub type filter selection

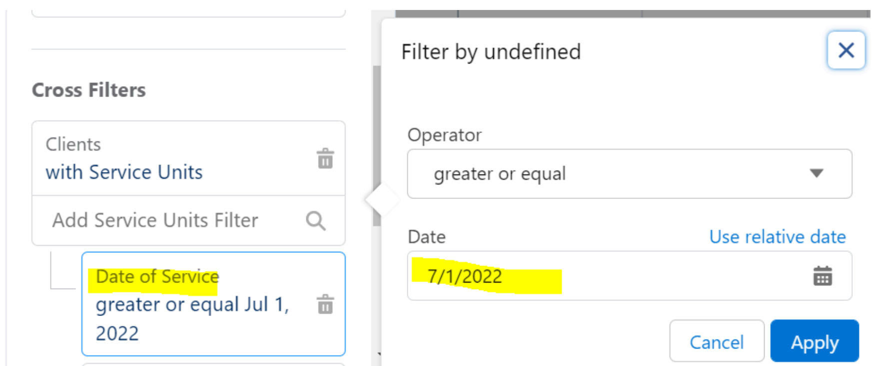


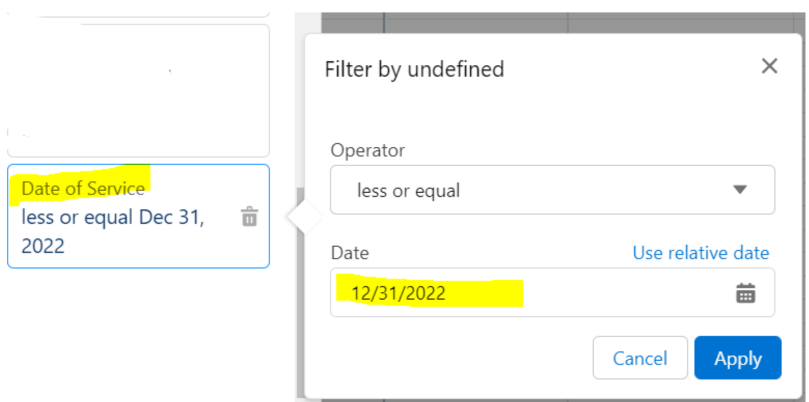
## Dates of Service: I want to see clients based on a different date range for date of service

1. If the Date of Service filter is a relative date (e.g. equals LAST 365 DAYS), you can replace it with a different relative date, like YESTERDAY, LAST WEEK, or NEXT 30 DAYS. For a list of supported values, see [Relative Date Filters Salesforce Help article]




2. If the date of service filter is based on a calendar date, you can select a new calendar date. If there are multiple calendar date Date of Service filters change the filters as follows:
   a. The Date of Service greater or equal filter = the Start Date.
   b. The Date of Service less than or equal filter = the End Date.




3. Click Apply, then Refresh, and finally, Save and Run.

## Troubleshooting/Warnings/Limitations for Missing Assessments or Client Info and Reassessments Reports

1. **We do not recommend that you add any fields under SERVICE UNITS as group rows, group columns, columns, or regular filters to the missing assessments,client info, or reassessments report templates if you want to see an unduplicated client list**. Adding unit history information in these places will cause duplication of clients in your report due to a Salesforce reports limitation. You will see the clients listed for each unit history record they have. The only way to de-duplicate the report in Salesforce is to remove the Unit History fields and then follow the cross-filter guidance above. If you want to keep the unit history information, you can export the report to Excel and de-duplicate from there.
2. We also do not recommend trying to include multiple assessment types in the same missing assessment or reassessment due report, you may end up filtering out clients who are only missing one type of assessment.

### What if I see duplication of clients when I adjust the filters?

To avoid duplication, make sure you are adjusting the *Cross Filters* and not the standard report Filters. If you add to the standard **Filters** (above the **Cross Filters**), make sure you only add filters using fields that are from the Client record. If you add information from Unit History/Service Units or Assessments to the standard **Filters** you may create duplication in your report. This is due to a Salesforce limitation. One client can have many unit records and many assessment records. Salesforce will list the client in the report for as many unit history or assessment records they have in SUDS (based on any standard filter parameters for unit history or assessments).

### What if I want to see all the assessments or units the client had in my assessments, reassessments, or missing client information reports?

If it is helpful for you to see the assessments or units in the reports, you can add fields from Unit History or Assessments to your report. You add the fields on the **Outline** tab of the left hand side of the report edit screen. You can also use the standard report **Filters** to control what records you will see. For example if you want to see all the clients' units for the past six months, you can add a Date of Service filter to the standard report filters. See the ADL Reassessment Due w/ Units report in the Reassessments folder for an example.