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Caregiver Reports in SUDS

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Sections

- The Evolution of Caregivers in SUDS
- Service Reports for Caregivers and Care Recipients
- Client Reports for Caregivers and Care Recipients
- Caregivers and Care Recipients Relationship Report
- Eligibility Reports for Caregivers and Care Recipients
- Caregiver and Care Recipient Report List in SUDS

The Evolution of Caregivers in SUDS

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A Brief History…

- When SUDS launched, the Caregiver/Care Recipient relationship functionality didn't work properly.
- Several issues migrated from PeerPlace to SUDS such as missing relationships and eligibility, and incorrect service unit recording.
- Extensive cleanup took place between SFY2024 and SFY2025.
- SUDS validations prevent users from creating Caregiver or Care Recipient records that don't meet requirements.

…so why are Caregiver/Care Recipient Reports so hard?

- It's not that they don't work, it's that our Salesforce license does not let us pull together three objects in a single report. The three objects are Clients, Caregiver/Care Recipient Relationship, and Service Units. We'll learn about some workarounds today.

Service Reports for Caregivers and Care Recipients

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Caregiver/Care Recipient Service Reports

- Uses the Report Type **Unit History Custom**
- Two (2) ways to identify Caregiver clients
  - Service contains Caregiver
    - AAS Service Name *contains* “Caregiver”
    - AAS Service Name *does not contain* “Grandparent”
  - Client is Caregiver = TRUE
- Care Recipients are identified by Client is Care Recipient = TRUE
- These fields rely on the Caregiver/Care Recipient Relationship being set up in SUDS (the red banner on client).

Report Location in SUDS

All Folders ➡ SUDS User Reports ➡ Caregiver ➡ Services

This folder includes three (3) reports:

1. SFY2027 Caregivers with CG Services
2. SFY2027 Caregivers with All Services
3. SFY2027 Care Recipients with All Services

Client Reports for Caregivers and Care Recipients

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Caregiver/Care Recipient Client Reports

- Uses the Report Type **Clients**
- This is a standard client report where any information found on the client record may be included (e.g., Name, DOB, Phone Number, Address). This report cannot pull in Relationship fields
- These reports create a list of unique clients
- Fields specific to Caregiver:
  - Client is Caregiver
  - Caregiver Assessment Date (most recent)
  - Caregiver/Care Recipient Eligibility
- Two (2) ways to identify Caregiver clients
  - Service contains Caregiver (Uses Cross-Filter)
  - Client is Caregiver = TRUE
- Care Recipients are identified by Client is Care Recipient = TRUE

Report Location in SUDS

All Folders → SUDS User Reports → Caregiver → Clients

This folder includes two (2) reports:

1. Caregiver Clients - Active/Hiatus
2. Care Recipient Clients - Active/Hiatus

Caregivers and Care Recipients Relationship Report

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Caregiver/Care Recipient Relationship Report

- Uses the Report Type **Clients with Caregiver Relationship**
- The report combines fields from the Client record and the Caregiver/Care Recipient Relationship
- All Caregiver fields are noted with a Caregiver prefix. Care Recipient fields use a Care Recipient prefix (e.g., Caregiver: County; Care Recipient: County)
- You can add a Cross-Filter for Service Units, but service unit information cannot be added to the report results. For example, you cannot list the services a Caregiver received or their total number of service units
- This is not an unduplicated list. If a Caregiver has more than one Care Recipient, the Caregiver will be listed once per Care Recipient, with each Care Recipient on its own line
- A Care Recipient can be listed multiple times if they have more than one Caregiver

Report Location in SUDS

All Folders → SUDS User Reports → Caregiver → Relationship

This folder includes one (1) report:

1. CGs with Care Recipient Relationship

Eligibility Reports for Caregivers and Care Recipients

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Caregiver and Care Recipient Eligibility

What Makes a Family Caregiver Eligible for Services?

- 18+
- Unpaid/Informal Caregiver to the Care Recipient
- Must have a CG/CR Relationship in SUDS that includes OAA Eligibility
    - Family Caregiver
        - Family Caregiver of an older individual (age 60+)
        - Family Caregiver of an individual (age < 60) with Alzheimer's disease or related disorder

What Makes a Care Recipient Eligible for Services?

- The majority of Care Recipients are 60+ and thus eligible for Older Adult services
- Additional Care Recipient Eligibility (2+ ADLs or Cognitive Impairment) is required when a Caregiver receives Caregiver Respite or Supplemental Services

Caregiver/Care Recipient Eligibility Reports

There are multiple report types and methods for handling Eligibility; it just depends on how you need to look at your data.

CGs with CR's Eligibility (Caregivers and Care Recipients)

- As we saw in the Relationship report, all fields are noted with a Caregiver/Care Recipient prefix
- The main difference between this report and the Relationship report is that this report includes the Caregiver's Care Recipient Eligibility
- Again, just like the Relationship report, this is not an unduplicated list. If a Caregiver has more than one Care Recipient, the Caregiver will be listed once per Care Recipient and a Care Recipient can be listed multiple times if they have more than one Caregiver

Report Location in SUDS

All Folders ➡ SUDS User Reports ➡ Caregiver ➡ Eligibility

This folder includes three (3) reports:

1. CGs with CR's Eligibility - All (CG's CR Eligibility = True and False)
2. CGs with Missing CR Eligibility (CG's CR Eligibility = FALSE)
3. Provider_CGs with Missing CR Eligibility

Caregiver/Care Recipient Eligibility Reports Continued

CGs with Missing CR Eligibility (Caregivers and Care Recipients)

- Same as the Eligibility - All Report, but results only list Caregivers with Care Recipients who do not meet Care Recipient Eligibility
- **Results include Care Recipients' ADL score and Cognitive Impairment**

Provider_CGs with Missing CR Eligibility (Unit History Custom)

- This is a service unit report that can pull in most client fields, including Eligibility
- It's currently set to show Caregiver clients who have received Caregiver Respite or Supplemental service in the current fiscal year, but their Care Recipient does not have Eligibility completed in SUDS
- **This report cannot pull in Care Recipients' ADL scores or Cognitive Impairment**

Report Location in SUDS

All Folders ➡ SUDS User Reports ➡ Caregiver ➡ Eligibility

This folder includes three (3) reports:

1. CGs with CR's Eligibility - All (CG's CR Eligibility = True and False)
2. CGs with Missing CR Eligibility (CG's CR Eligibility = FALSE)
3. Provider_CGs with Missing CR Eligibility

Caregiver and Care Recipient Report List in SUDS

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Primary Caregiver/Care Recipient Reports in SUDS

Report Name	How it Works	Caveats
Clients Cannot display service unit fields in results	• Can create a unique list of Caregivers or Care Recipients • Can include Eligibility checkboxes • Can Cross-Filter with Service Units • Can include any field found on the Client record	• Cannot list services, providers, or service unit totals
Unit History Custom Can pull just about anything in, but it's duplicated	• Primary Service Unit Report • Can create a list of Caregivers or Care Recipients by Region, Provider, or Service • Can include Eligibility checkboxes and any fields on the Client record	• Clients will be duplicated based on the number of service unit records tied to the client. Duplication will impact all fields in the report • Cannot pull in Relationship fields • Cannot pull in Care Recipient-specific fields
Caregiver and Care Recipient (Custom) Cannot Link to Units	• Primary Relationship report • Includes fields from Client and CG/CR Relationship records like Caregiver Relationship to Care Recipient • Can include client-specific data, like Caregiver and Care Recipient Eligibility	• Cannot be linked to Service Units • Caregivers will duplicate when they have more than one Care Recipient • Care Recipients will duplicate if they have more than one Caregiver
Clients with Caregiver Relationship Can Link to Units	• This report pulls in any clients with a Caregiver Relationship • Includes all client fields in addition to all relationship fields	• Cannot link to Service Units

Other Caregiver/Care Recipient Reports

Report Name	How it Works	Caveats
Clients with Care Recipient Relationship (Custom)	• Pulls in fields from Client and Caregiver/Care Recipient Relationship • Contains some Care Recipient Fields	• Does not include Client's Care Recipient Eligibility • Can add Cross-Filter to Service Units
Caregiver / Care Recipient (Custom)	• Only includes fields found on a Caregiver/Care Recipient Relationship record, which includes a small amount of Client fields as well	• No links to Client or Service Unit records
Clients with/without linked Caregivers (Custom)	• This is a Client report that can list Clients with a CG/CR Relationship or without a CG/CR Relationship	• Can add a Cross-Filter to Service Units
Clients with/without linked Care Recipient (Custom)	• This is a Client report that can list Clients with a CG/CR Relationship or without a CG/CR Relationship	• Can add a Cross-Filter to Service Units
Caregiver / Care Recipient with Caregiver Client (Standard)	• Pulls in fields from the Caregiver/Care Recipient Relationship	• Cannot Cross-Filter to Service Units

Other Caregiver/Care Recipient Reports Continued

Report Name	How it Works	Caveats
Caregiver / Care Recipient Relationship (Standard)	• Pulls in fields from the Caregiver/Care Recipient Relationship • Defaults to the Relationship ID	• Cannot Cross-Filter to Service Units
Caregiver / Care Recipient Relationship with Caregiver (Standard)	• Pulls in fields from the Caregiver/Care Recipient Relationship • This is essentially a relationship report, but it focuses on fields related to the Caregiver	• Cannot Cross-Filter to Service Units
Caregiver / Care Recipient Relationship with Care Recipient (Standard)	• Default fields include the CG/CR relationship ID and the CR's Client ID • This is essentially a relationship report, but it focuses on fields related to the Care Recipient • Caregiver ID is still included, but Caregiver fields are limited	• Cannot Cross-FIlter to Service Units
Caregiver / Care Recipient Relationship with History (Standard)	• This is an internal report, pulling in version history • Do not use	N/A

Caregiver Report Links

Report Name	Platform Link	Portal Link
Services		
SFY2027 Caregivers with All Services	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000DnzKb2AJ/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000DnzKb2AJ/sfy2027-caregivers-with-all-services?queryScope=userFolders
SFY2027 Caregivers with CG Services	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000DnytB2AR/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000DnytB2AR/sfy2027-caregivers-with-cg-services?queryScope=userFolders
SFY2027 Care Recipients with All Services	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000DnzUH2AZ/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000DnzUH2AZ/sfy2027-care-recipient-with-all-services?queryScope=userFolders

Caregiver Report Links for Portal Users

Report Name	Platform Link	Portal Link
Clients		
Caregiver Clients - Active/Hiatus	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000Do1pR2AR/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000Do1pR2AR/caregiver-clients-activehiatus?queryScope=userFolders
Care Recipient Clients - Active/Hiatus	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000Do25Z2AR/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000Do25Z2AR/care-recipient-clients-activehiatus?queryScope=userFolders

Caregiver Report Links for Portal Users

Report Name	Platform Link	Portal Link
Relationship		
CGs with Care Recipient Relationship	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000DoCWL2A3/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000DoCWL2A3/cgs-with-care-recipient-relationship?queryScope=userFolders

Caregiver Report Links for Portal Users

Report Name	Platform Link	Portal Link
Eligibility		
CGs with CR's Eligibility - All	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000D6cRJ2AZ/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000D6cRJ2AZ/cgs-with-crs-eligibility-all?queryScope=userFolders
CGs with Missing CR Eligibility	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000DoQ332AF/view?queryScope=userFolders	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000DoQ332AF/cgs-with-missing-cr-eligibility?queryScope=userFolders
Provider_CGs with Missing CR Eligibility	https://socgov22.lightning.force.com/lightning/r/Report/00OWQ00000DvtjR2AR/view	https://socgov22.my.site.com/SUDSPortal/s/report/00OWQ00000DvtjR2AR/providercgs-and-missing-cr-eligibility?queryScope=userFolders

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