Chapter VI CREATING AND MANAGING ROSTERS

AIM has a built-in function for creating and managing client Rosters, which can be used to track service units for later data entry. A Client Roster is a Report (Report ID’s SC01 - SC03) that lists Clients and days of the week or month for which the service manager can circle days of the week or dates of the month that the clients received services.

NOTE: Only clients with the Status of ACTIVE will appear on the Roster Reports (SC01-SC03), REGARDLESS of whether or not they have been selected to appear on the roster on the “Select Clients for Roster:” Screen.
You can manage the Client Rosters in two different areas:

- **One Client on Various Rosters** at the same time from the Client Screen as you Insert, Assess, or Change the Status of a Client.

- **Various Clients on One Roster** at the same time from the Roster by Activity Screen

**From the Client Screen:** Add and Remove clients for various Roster reports by Clicking the **Roster by Client** Button.

A window will pop-up where you can add this client to, or remove this client from, one or more rosters. Using this button, you can add or remove the client from the Roster(s) at the time that you initially enter the client or when you go into the client’s record to add a re-assessment or change the status. Simply Click the Activity for which the Client will be added or removed. If the Activity is **highlighted in blue**, the client will appear on the corresponding Activity Roster. If the Activity is NOT highlighted, the client will NOT appear.

**From the Roster-by-Activity Screen:**
1. Click on **Screens > Roster by Activity**.
2. The Activity Quick Find Screen will appear.

3. **Click** on **ONE Activity** for which you wish to create a roster or manage an existing roster.

4. The "Select Clients for Roster:" screen appears with clients who were previously selected for this Activity highlighted. If you have selected an Activity for which no roster has previously been created, no clients will be highlighted.

5. **Click** on the clients you wish to Add or Remove from the Roster. Those Clients that are **highlighted in blue** will appear on the Roster and those not highlighted will not appear.

6. **OR** you may prefer to have **AIM auto-add** clients to the Roster (or a combination of both methods: auto-add clients and then add/remove clients as needed.)
7. To **Auto Select (ADD ONLY)** clients to the Roster, **Enter a Date Range** for which most of the clients you want to put on this roster have already received the Activity and then **Click** the “**Auto Select**” button. The following message will display.

8. If you are starting with a blank roster (or if your roster is way “out-of-whack”), you can **DESELECT ALL** the clients on the Roster and then use the Auto-Add feature to “Refresh the list.”

8. **Click OK** when finished.

9. Those are the client that will display on the SC01 – SC03 and the Sign in Sheet LG94.