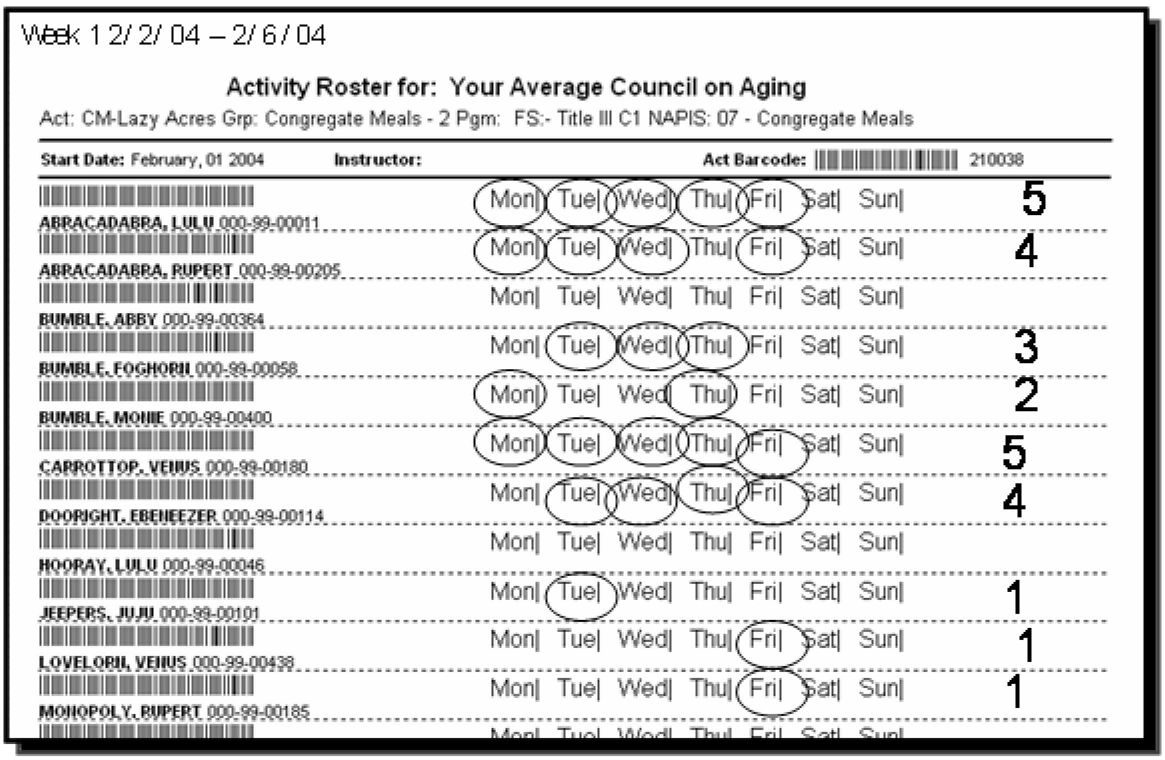
Chapter VI **CREATING AND MANAGING ROSTERS**

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.



Week 1 2/2/04 – 2/6/04

Activity Roster for: Your Average Council on Aging

Act: CM-Lazy Acres Grp: Congregate Meals - 2 Pgm: FS:- Title III C1 NAPIS: 07 - Congregate Meals

Start Date: February, 01 2004 Instructor: Act Barcode: 210038

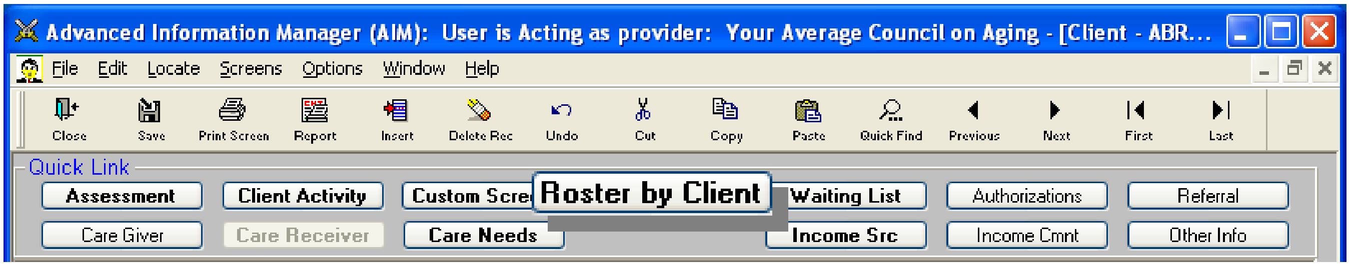
ABRACADABRA, LULU 000-99-00011	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	5
ABRACADABRA, RUPERT 000-99-00205	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	4
BUMBLE, ABBY 000-99-00364	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	
BUMBLE, FOGHORN 000-99-00058	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	3
BUMBLE, MONIE 000-99-00400	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	2
CARROTTOP, VENUS 000-99-00180	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	5
DOORIGHT, EBENEEZER 000-99-00114	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	4
HOORAY, LULU 000-99-00046	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	
JEEPERS, JUJU 000-99-00101	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	1
LOVELORN, VENUS 000-99-00438	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	1
MONOPOLY, RUPERT 000-99-00185	Mon| Tue| Wed| Thu| Fri| Sat| Sun|	1

The Report determines which clients will show on the Roster, based on this Roster Management tool.

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.

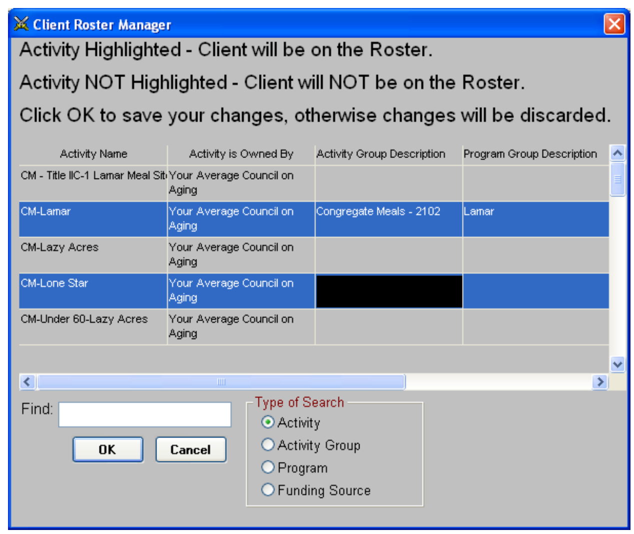
You can manage the Client Rosters in two different areas:

- **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



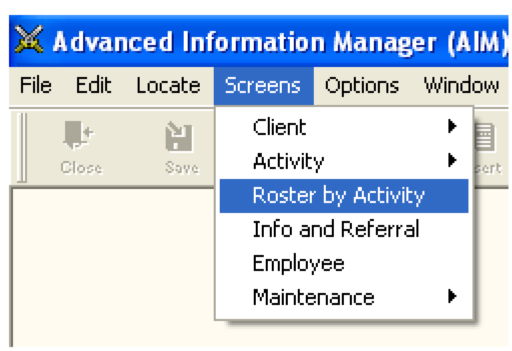
- **From the Client Screen:** Add and Remove clients for various Roster reports by **Clicking** the the **Roster by Client** Button.

  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.



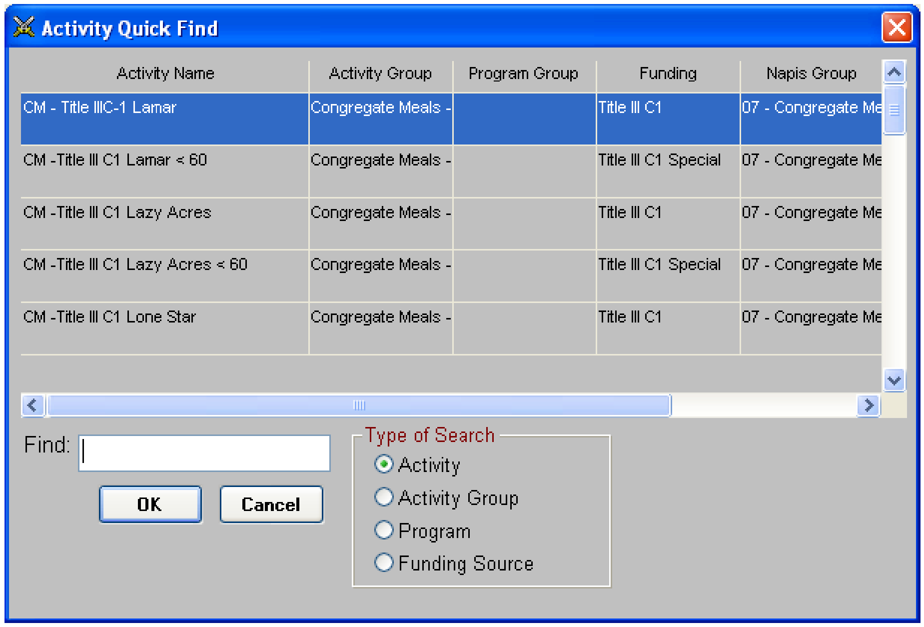
- **From the Roster-by-Activity Screen:**

1. **Click** on **Screens** > **Roster by Activity**.



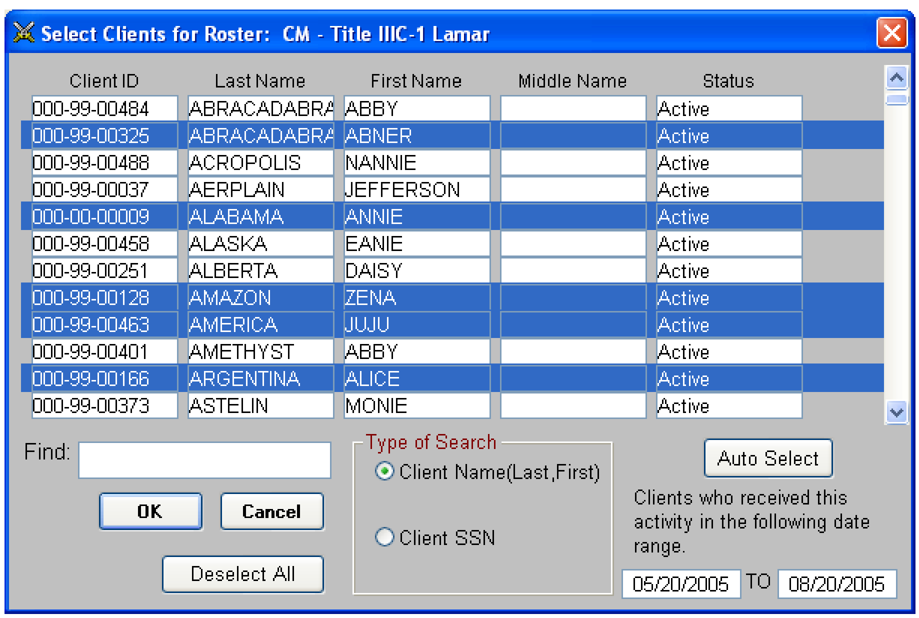
2. The Activity Quick Find Screen will appear.

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

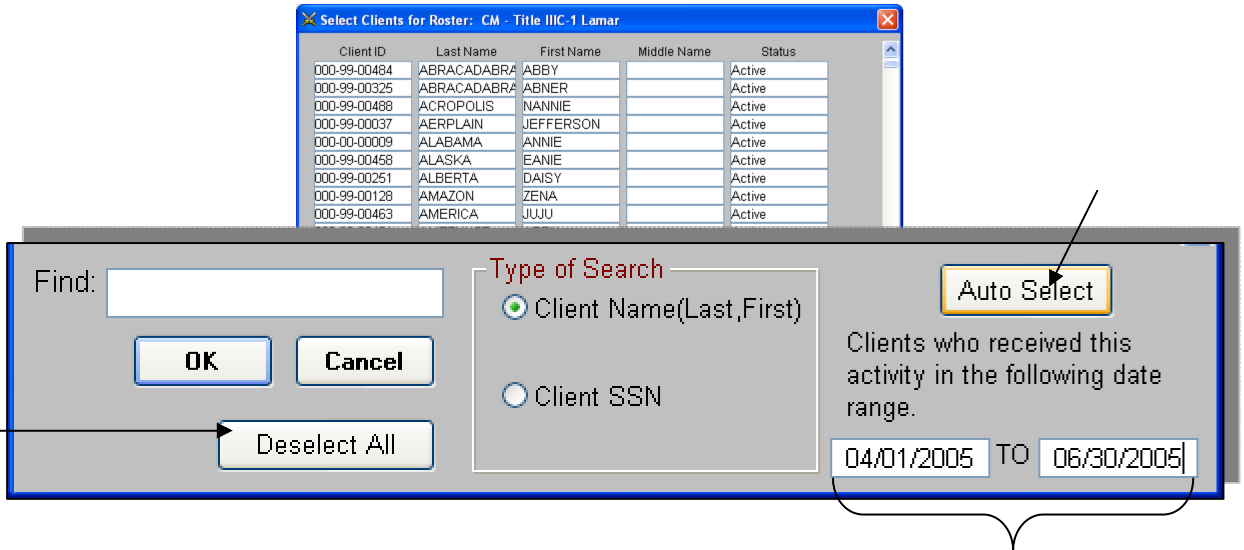


4. The "**Select Clients for Roster:**" screen appears with clients who were previously selected for this Activity highlighted. If you have selected an Activity for which no roster has previously been created, no clients will be highlighted.

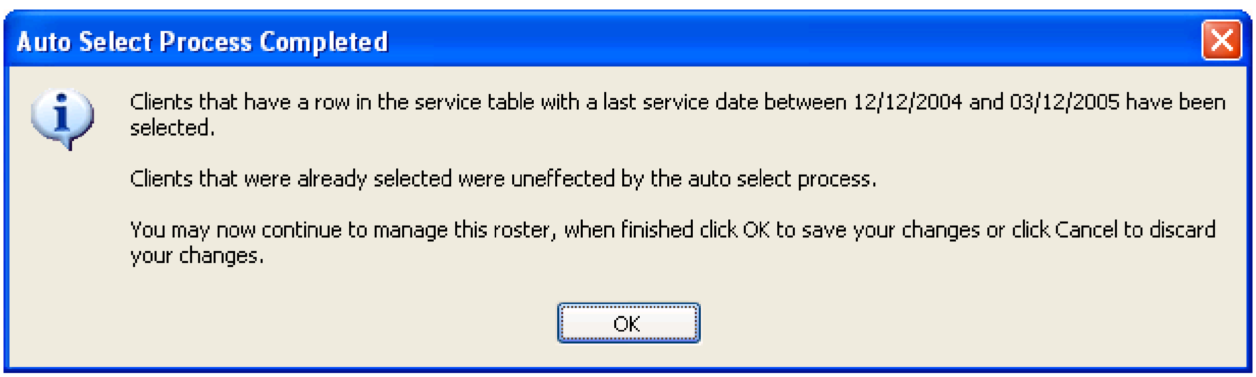
5. **Click** on the clients you wish to Add or Remove from the Roster. Those Clients that are **highlighted in blue** will appear on the Roster and those not highlighted will not appear.



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.