BUILDING A NEW ROSTER
(Use the 7,3,2,5 Rule when Building a New Roster)

SECTION I: Roster - Only 7 filters need to be set as follows:

1. NAME OF THE ROSTER: The name should show County or Senior Center name, Service Name and Fund Identifier. (Abbreviating Senior Center name is fine.)
2. TYPE: Select: SPECIFIED SERVICE (always)
3. CARE PROGRAM: Select: ALL FUNDED SERVICES (always)
4. AGENCY: Add: Name of the Area Agency
5. PROVIDER NAME: Select: Provider name from the Drop-Down List. (always)
6. PROVIDER SITE: Select: Site for the service (always)
7. BASED ON: Select: SERVICE DELIVERY (always)

SECTION II: Services (Look to the top right side of the Roster building screen for the Services section)

1. CLICK ON: Add New
2. SELECT: The name of the Service that is being recorded.
3. SELECT: The name of the Fund Identifier.

SECTION III: Roster Filters (Set 2 only)

1. INCLUDE INACTIVE CONSUMERS: (**Suggest answer be YES**. Reason: If a consumer is deactivated during that month and received a service, the name will be removed from the roster and the grand total will change based on the number of services the deactivated consumer had for the month.)
2. INCLUDE CONSUMER GROUPS: (**Suggest answer be NO**. Reason: Any consumer group service related to the roster service will be included in the grand total for that roster. It may cause confusion.)

SECTION IV: Service Filters (Set 5 only)

1. SERVICE: Select: The name of the service that you will be recording to the roster.
2. PROVIDER: Select: The Provider name from the Provider List.
3. SITE: Select: A Site for the service provided (always)
4. SERVICE FUND ID: Select: The Fund Identifier for the Service (Example: TIII-B, LIFE, etc.
5. DAY RANGE SETTING: Always set a Day Range for consumers to drop off the roster. (Typically, 5 months' time frame is used for the name(s) to drop off.) Doing this keeps the roster manageable. If this is not done, the consumer's name will remain on the roster for the life of the roster.

SPECIAL NOTE: SETTING TOO MANY FILTERS CAN BE AS BAD AS TOO FEW FILTERS and the results will not be what you expect.

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