

Guidance ECRS 2015-01

Managing Agency Rosters (Effective 4/3/2015)

DID YOU KNOW?

It is important to maintain an accurate listing of individuals enrolled in each of your programs. The purpose for this is multi-fold. By maintaining an accurate roster for each of your programs allows for your administrative staff, as well as, DDDS staff to run a snap shot at any given time as to the individuals being served in a specific program or all programs. This will prove to be a benefit to many such as OBCBS – DDDS Fiscal unit, DDDS Supervisors, etc.

Another purpose is that it allows for proper accounting of individuals within Therap to generate their annual billing, to assure your “active” records is accurate and current. To prepare for the proper accounting for Therap to conduct their billing as of July 1, 2015 it is important that the process below is completed and managed by your agency on a continuous basis. It is recommended to have the initial reconciliation completed by June 1, 2015 in order to prepare for the 2015-2016 billing.

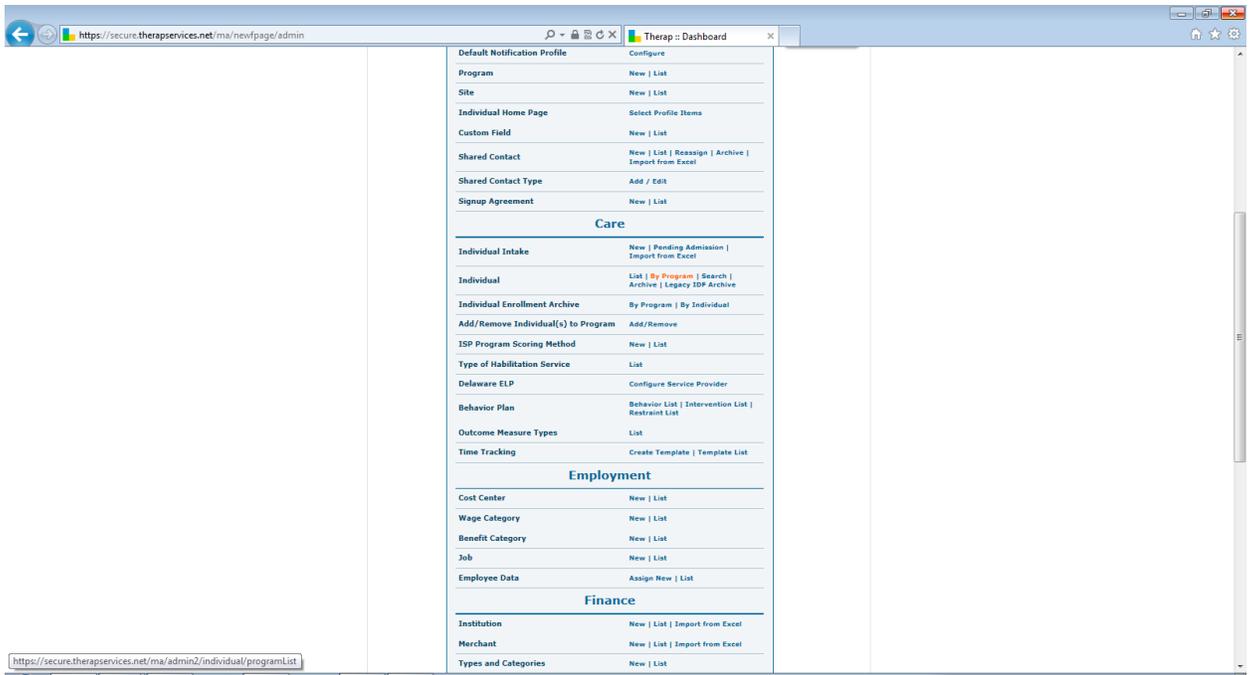
Getting the roster for all programs within your agency

1. Go to your “Agency Reports” tab
2. Click on “View” to the right of Report Library
3. Page through list of reports and click on **“Individual General Information with Program (Active in Program)”**
4. Export to Excel
5. Sort Report by “Program” and “Last Name” (Column A) – this will sort the report first by program and then by last name of individual in each of those programs.

Should you find any discrepancies, you can follow the instructions below for managing your rosters.

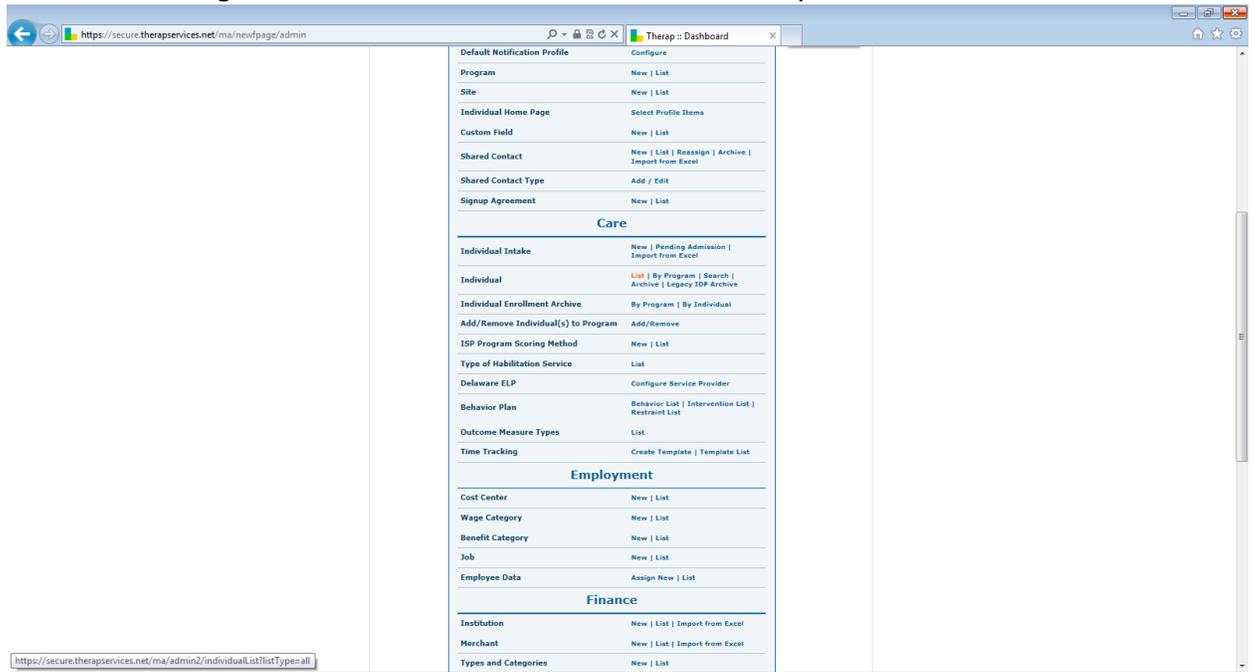
Managing your program rosters within your agency

1. Go to your “Admin” tab
2. Click on “By Program” to the right of Individual



3. Select the program in which you want to view the roster
4. The roster will appear in alphabetical order
5. If an individual appears on the roster that should not be there
 - a. Update by clicking on “Program Enrollment” to the right of the individual’s name and discharging them with date from that program.
 - b. Search for the individual’s name on the “Individual List” screen
 - i. Click on the individual’s name on the list
 - ii. Scroll to the bottom of the IDF
 - iii. Click on Discharge and enter discharge date (this step is crucial, otherwise the individual remains an active participant with your agency) – **DO NOT COMPLETE THIS STEP IF THE INDIVIDUAL IS STILL ACTIVE WITHIN ANOTHER PROGRAM OF YOUR AGENCY**

- If an individual does not appear on the roster, but should, then you will need to go back to “list” to the right of “Individual” under the Care section of your dashboard.



- Search for the individual's name
- Click on “Program Enrollment” to the right of their name
- Enroll them in the appropriate program with date