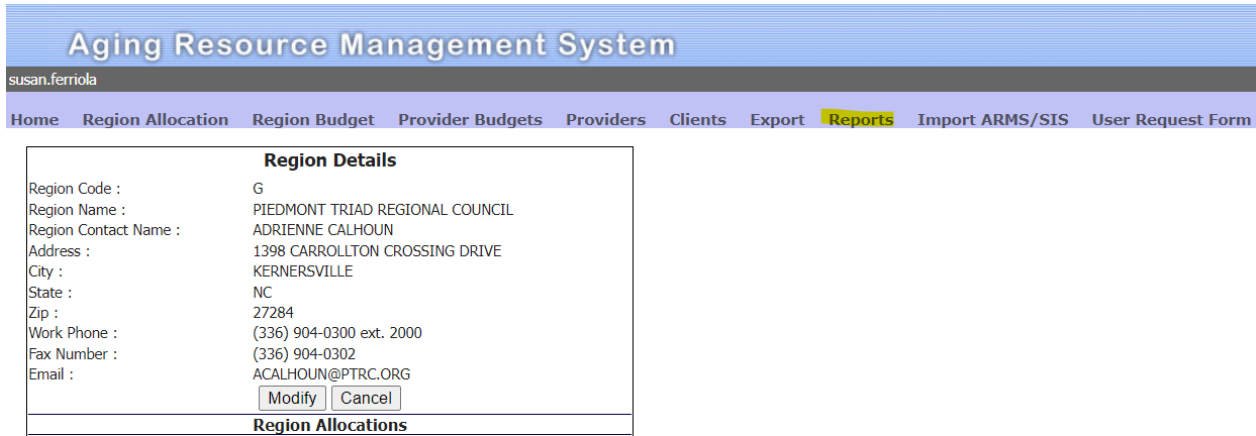


To pull the client list with out of Assessments, you will need to run a ZGA101 report. To access reports area, click the word “Reports” in the lavender menu bar.



Click the words “Client/Waiting Lists”



This will open the options to the many different client reports in that section. You want the ZGA101.

Client/Waiting Lists

| Name | Description |
|--------|---|
| ZGA100 | Client Master List- Active by County |
| ZGA101 | Client Master List - Provider Clients Served |
| ZGA102 | Client Master List- Inactive by Provider |
| ZGA103 | Client Master List -Emergency Contact -Active by County |
| ZGA104 | Client Master List -Emergency Contact -Active by Provider |
| ZGA105 | Registered Client Master List by County |
| ZGA106 | Client Master List - Provider Clients Served Status |

You will see the different dropdown options. Use the current fiscal year, and pick the provider you are looking for in the Provider dropdown menu. In the example we are using Randolph Senior Adults Association with ARMS ID code of G055. Generate the report.

Report - ZGA101
Client Master List - Provider Clients Served

Fiscal Year: 2023
 Region: G
 County: All
Provider: G005
 Service: All

Generate Report

Aging Resource Management System
susan.ferriola

Home Region Allocation Region Budget Provider Budgets Providers Clients Export Reports Import ARMS/SIS User Request Form

Find... 1 of 64 100%

Group Tree: 020, 030, 180, 250, 440, 859, 883

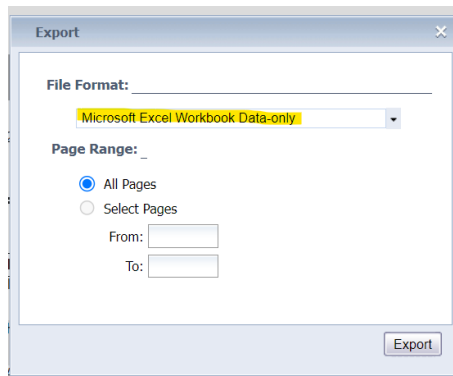
Main Report

CONFIDENTIAL
 NORTH CAROLINA DIVISION OF AGING AND ADULT SERVICES
 Report ZGA 101 - Client Master List - Provider Clients Served
 Region: G Provider Name: RANDOLPH SENIOR ADULTS ASSOCIATION, INC. (I
 County Name : Randolph

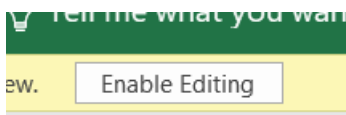
Print Date: 3/8/2023 3:06:43PM
 Fiscal Year: 2023

| Last Name | First Name | ID | DOB | Age | Sex | At/Below Poverty Level | Marital Status | HH Size | Race | Hisp/Latino | Primary Language | Func Status |
|---------------------------|------------|----|-----|-----|-----|------------------------|----------------|---------|-------|-------------|------------------|-------------|
| 020(HOME DELIVERED MEALS) | | | | | | | | | | | | |
| A | N | 0 | 08 | 88 | F | Y | S | 2 | WHITE | N | English | At Risk |
| A | S | 1 | 10 | 61 | F | Y | N | 2 | WHITE | N | English | Well |
| A | V | 3 | 11 | 67 | F | N | S | 1 | WHITE | N | English | Well |

Click the “export” button.
 In the dropdown menu select “Microsoft Excel Workbook Data-only”.



This will generate a download of the Microsoft excel spread sheet. Find your download, open it, and enable editing.



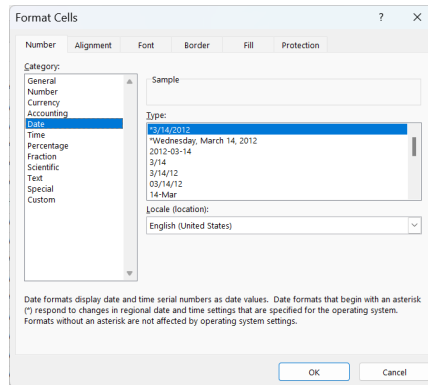
Once you have enabled editing, go to column Q (Last Assmt Date):

CONFIDENTIAL NORTH CAROLINA DIVISION OF AGING AND ADULT SERVICES
 Report ZGA 101 - Client Master List - Provider Clients Served
 Region: G Provider Name: RANDOLPH SENIOR ADULTS ASSOCIATION, INC. (G005)
 County Name : Randolph

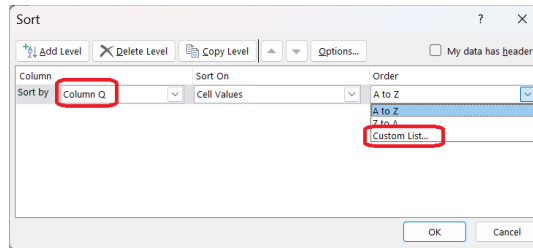
Print Date: 3/8/2023 3:06:43PM
 Fiscal Year: 2023

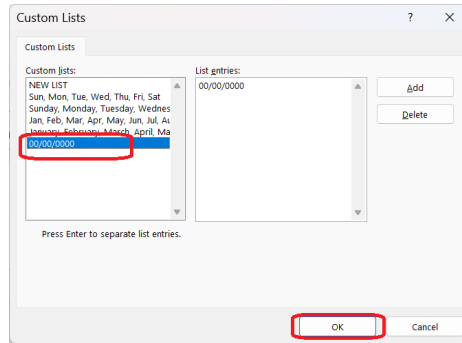
| Column A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R |
|---------------------------|------------|-----------------|---------------|-----|-----|------------------------|----------------|---------|-------|--------------|------------------|-------------|-------------|-------------|--------------|-----------------|---------------|
| Last Name | First Name | ID | DOB | Age | Sex | At/Below Poverty Level | Marital Status | HH Size | Race | Hispl Latino | Primary Language | Func Status | Nutr Status | Regist Date | Establi Date | Last Assmt Date | Client Status |
| At/BelowPoverty | Le | Last Assmt Date | Client Status | | | | | | | | | | | | | | |
| 020(HOME DELIVERED MEALS) | | | | | | | | | | | | | | | | | |
| A | N | | | 88 | F | Y | S | 2 | WHITE | N | English | At Risk | High Ris | 06/01/21 | 06/30/21 | 12/15/2022 | A |
| A | S | | | 61 | F | Y | N | 2 | WHITE | N | English | Well | High Ris | 12/01/21 | 12/14/21 | 12/15/2022 | A |
| A | V | | | 67 | F | N | S | 1 | WHITE | N | English | Well | Good | 10/05/21 | 10/05/21 | 10/05/2022 | R |
| A | G | | | 86 | F | N | S | 1 | WHITE | N | English | At Risk | Good | 08/16/21 | 10/27/21 | 08/15/2022 | R |
| A | G | | | 65 | M | Y | M | 2 | WHITE | N | English | At Risk | High Ris | 02/17/21 | 02/17/21 | 09/06/2022 | A |
| A | J | | | 64 | F | Y | M | 2 | WHITE | N | English | At Risk | High Ris | 02/17/21 | 02/17/21 | 09/06/2022 | A |
| A | P | | | 86 | F | Y | S | 1 | WHITE | N | English | High Ris | Good | 06/07/21 | 06/16/21 | 12/21/2022 | A |
| A | C | | | 92 | F | N | S | 1 | WHITE | N | English | Well | High Ris | 06/26/21 | 06/26/21 | 12/13/2022 | A |

Highlight the column and change the properties to “date”:

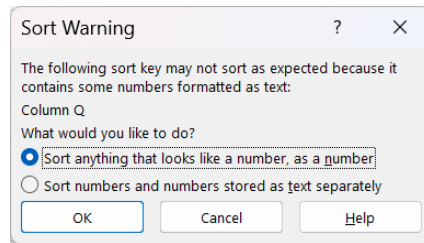


Hide all unnecessary columns. You only need the *first name, last name, and assessment date*. Then highlight all three columns, and click “custom sort”.





Click ok, then ok:



And click a third ok.

Now your clients are listed by the oldest assessment date to the newest assessment date. Only clients that have received units in the current fiscal year will show in the list.

| | A | B | |
|----|---|----------|------------|
| 1 | B | W | 07/17/2009 |
| 2 | T | R | 03/02/2010 |
| 3 | B | L | 09/01/2011 |
| 4 | B | L | 09/01/2011 |
| 5 | Y | M | 02/29/2012 |
| 6 | A | D | 06/05/2012 |
| 7 | B | B | 11/05/2013 |
| 8 | M | J | 01/17/2014 |
| 9 | B | D | 08/02/2014 |
| 10 | L | S | 03/01/2015 |
| 11 | A | A | 10/21/2015 |
| 12 | M | L | 12/11/2015 |
| 13 | V | M | 04/29/2016 |
| 14 | G | E | 08/02/2016 |
| 15 | T | E | 05/09/2017 |
| 16 | T | E | 05/09/2017 |
| 17 | V | G | 05/16/2017 |
| 18 | B | C | 05/23/2017 |
| 19 | B | C | 05/23/2017 |
| 20 | B | ROBERT B | 10/18/2017 |