

Record of Revisions to Patient Tracking Spreadsheet Template

Below is a record of revisions made by the AIMS Center to the Patient Tracking Spreadsheet Template. The purpose of this document is to inform spreadsheet users of any bug fixes or updates made to the spreadsheet since they began using it. If you are unsure which version of the spreadsheet you downloaded, refer to the “Disclaimer” tab on your spreadsheet to see the date it was signed.

The dates below indicate when a revised version of the spreadsheet was distributed to the Patient Tracking Spreadsheet listserv (aims_spreadsheet_registry@u.washington.edu), with the most recent updates appearing at the top of the page. It's *strongly encouraged* that you always use the most recent version of the spreadsheet, as there could be bug fixes that affect functionality. If you prefer to make the updates to your existing spreadsheet rather than downloading the new version and transferring your patient data, instructions on how to do so are provided below.

If you would like to receive spreadsheet updates when they are posted, please subscribe to the Patient Tracking Spreadsheet listserv [here](#).

12/15/17

- **Revision:** Revise formula in “Date of Psychiatric Case Review” column such that a review date from a previous episode of care will not display in this cell.
 - *Note:* This is an important revision to make. Though it does not necessarily affect fundamental functionality of the spreadsheet, it will make it clearer when a patient has not been reviewed by the psychiatric consultant in their current episode of care.
- **How to perform this revision on your copy of the spreadsheet**
 - Go to the Patient Tracking worksheet and unprotect it
 - Click on cell R3, or the grey cell in the “Date of Psychiatric Case Review” column for the first patient block
 - Revise the formula to be: =IF(S3>=J3,S3,"")
 - **Note:** If you have changed the columns on your version of the spreadsheet, you may need to use different cell reference for S3 and J3 in the above formula. Follow the guidelines below for choosing the correct cells:
 - S3: This should refer to the column/cell that is immediately to the right of the grey cell in the “Date of Psychiatric Case Review” column (it will be a hidden column)
 - J3: This should refer to the purple cell in the “Actual Contact Dates” column for the specific patient block.
 - Copy this formula to all other grey cells in the “Date of Psychiatric Case Review” column
 - Re-protect the Patient Tracking worksheet

- **Revision:** Revise “Episode Number” column to auto-populate with “1” for all contacts unless manually changed for a new episode of care.
 - *Note:* This revision does not affect fundamental functionality of the spreadsheet, but it allows you to bypass entering an episode number at every contact, unless the patient is starting a new episode of care.
- **How to perform this revision on your copy of the spreadsheet**
 - Please take note of whether any of your patients currently have more than one episode of care recorded! This modification will automatically populate a “1” for the episode number next to *all* contacts, so you will need to make sure to change the episode number manually for any patients who were discharged and returned to care (see page 11 of the [User Instructions](#) for more information on changing the episode of care).
 - Go to the Patient Tracking worksheet
 - Select the first white cell in the Episode Number column, which should contain no formula. Insert the formula: =IF(A4<>"",1,"")
 - In the next cell down, insert the formula: =IF(J5<>"",F4,"")
 - *Note:* If you have changed the columns on your version of the spreadsheet, you may need to use different cell reference for J5 and F4 in the above formula. Follow the guidelines below for choosing the correct cells:
 - J5: This should refer to the cell in the “Actual Contact Dates” column that is in the same row as the cell you are working in (likely row 5)
 - F4: This should refer to the cell directly above the cell you are working in, in the “Episode Number” column
 - Copy this formula into the remainder of the cells in the Episode Number column until you reach the next patient block (purple cell)
 - Highlight and copy *all* of the white cells in the Episode Number column of the first patient block, and paste into all of the other patient blocks on the spreadsheet
- **Revision:** Change number of patient blocks available from 100 to 200 blocks.
 - *Note:* This revision does not affect fundamental functionality of the spreadsheet, but it doubles its capacity.
- **How to perform this revision on your copy of the spreadsheet**
 - If you are the designated Spreadsheet Data Manager at your organization (see page 4 of the [User Instructions](#) for a description of this role), email aims_spreadsheet_registry@u.washington.edu to request a copy of the Spreadsheet Data Manager instructions.



4/11/17

- **Revision:** Reformat Care Manager Contact Notes column to correct places in which row does not AutoFit to text.
 - *Note:* This revision does not affect fundamental functionality of the spreadsheet; notes can still be entered in affected cells, but the cell will not expand to display the full note.
- **How to perform this revision on your copy of the spreadsheet**
 - Go to the Patient Tracking worksheet and unprotect it
 - Select all cells in the Care Manager Contact Notes column
 - On the Home toolbar click Format > AutoFit Row Height
 - Re-protect the Patient Tracking worksheet

3/1/17

- **Revision:** Edit text at the top of the Caseload Overview worksheet to provide clearer usage guidelines, include a reference to the de-identified template for the Caseload Overview, indicate a stipulation for displaying GAD-7 scores, and add a link to the Patient Tracking Spreadsheet Template resources page located on the AIMS Center website.
 - *Note:* This is an important revision to make so that users are clear on how to properly use the Caseload Overview worksheet and readily have access to further resources.
- **How to perform this revision on your copy of the spreadsheet**
 - Open the Patient Tracking Spreadsheet Template with example data, located [here](#).
 - Go to the Caseload Overview worksheet, and highlight the cells in Row 1 from the first cell to the end of the red text, which will appear as two larger blocks when you highlight them.
 - Copy the cells, and paste them into your version of the spreadsheet. You should also unhide the worksheet called “Caseload Overview – BACKUP,” paste the cells at the top of this worksheet, and then re-hide the backup worksheet.

1/20/17

- **Revision:** Remove Ticklers for patients with “Inactive” Treatment Status.
 - *Note:* This revision does not affect fundamental functionality of the spreadsheet; it simply cleans up the Tickler column such that “Past Due” and “Contact due” reminders do not appear for inactive patients.
- **How to perform this revision on your copy of the spreadsheet**
 - Go to the Patient Tracking worksheet and unprotect it
 - Click on cell E4, or wherever the first Tickler cell is on your current spreadsheet (that contains a formula)
 - At the very beginning of the formula, add a function for making the formula apply to any non-Inactive treatment statuses; if you have not changed these statuses from the original spreadsheet template, this function will be the following IF statement:
=IF(OR(C3="Active",C3="Relapse Prevention"),
At this point, you will continue with the original formula and add another “value if false” to the very end, so the whole thing in cell E4 should read:



=IF(OR(C3="Active",C3="Relapse Prevention"),IF(J4="",IF(I4<TODAY(), "Past Due",IF(I4=TODAY(),"Contact due today",IF(I4=(TODAY()+1), "Contact due in 1 day",IF(I4=(TODAY()+2), "Contact due in 2 days",IF(I4=(TODAY()+3), "Contact due in 3 days",IF(I4=(TODAY()+4), "Contact due in 4 days",IF(I4=(TODAY()+5), "Contact due in 5 days", " "))))))))), " ", " ")

- Drag this formula to the bottom of the patient block to copy it to the other cells in the Tickler column, and then highlight it and copy/paste to each subsequent patient block through the end of the spreadsheet
- Re-protect the Patient Tracking worksheet
- **Revision:** Remove Conditional Formatting for target scores in the Initial Assessment (purple) row so that an initial score does not turn this row green if it is at target.
 - *Note:* This revision does not affect fundamental functionality of the spreadsheet, but it is a correction to keep the Initial Assessment row clearly labeled.
- **How to perform this revision on your copy of the spreadsheet**
 - Go to the Patient Tracking worksheet and unprotect it
 - Select the cell in the Initial Assessment row for “PHQ-9 Score” in the first patient block (i.e., the purple cell that displays the Initial Assessment score for PHQ-9)
 - On the Home toolbar click Find & Select > Go to Special > Data Validation > Same > OK
 - Once all of the Initial Assessment cells in the PHQ-9 column are selected, click Conditional Formatting > Clear Rules > Clear Rules from *Selected Cells*
 - Repeat the previous three steps for the Initial Assessment score for the GAD-7 column
 - Re-protect the Patient Tracking worksheet

12/9/16

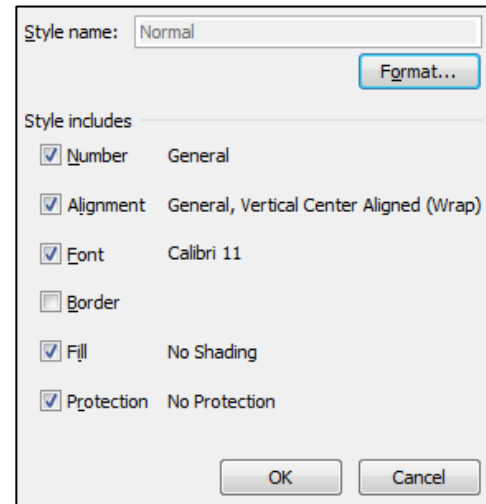
- **Revision:** Change Caseload Overview refresh shortcut to “Ctrl+J”
 - *Note:* This is an important revision to make, as many people have encountered issues with the “Ctrl+K” shortcut due to it overlapping with the shortcut to insert a hyperlink.
- **How to perform this revision on your copy of the spreadsheet**
 - Press “Alt+F8” to open the Macro dialog box
 - Click “Options”
 - Where it says “Shortcut key” type the letter “j”
 - Click “OK” to save the shortcut and exit the dialog box, and then click “Cancel” on the Macro dialog box
 - Save the spreadsheet, close it, reopen it, then press “Ctrl+J” to refresh
- **Revision:** Change formatting of Care Manager Contact Notes cells such that notes from an external source (e.g., your EHR) can be more easily copied and pasted
 - *Note:* This revision does not affect fundamental functionality of the spreadsheet, but it improves its user-friendliness.
- **How to perform this revision on your copy of the spreadsheet**

This revision cannot be performed on past versions of the spreadsheet due to protection settings on the Disclaimer tab. The change is not critical to functionality, but if you have encountered problems with copy/paste in the notes section, you might consider transferring



your caseload to the new template. Before transferring your caseload, ensure that the revision is functioning in your version of Excel® by doing the following:

- Go to the Patient Tracking worksheet
- On the Home toolbar, go to the “Styles” section and find the dropdown for cell styles
- Right click the Style option that says “Normal” (make sure you are not selecting Normal 2, Normal 3, etc.). Select the option for “Modify,” and check that the settings displayed match the screenshot to the right.
- If the settings match, go ahead with transferring your caseload to the new version. If the settings do not match, and you have been having problems with copy/paste in the notes section, a workaround would be to paste notes unformatted into a program such as [Microsoft Notepad](#), and then paste them into the spreadsheet.



- **Revision:** Revise macro to avoid possible run-time error when refreshing the Caseload Overview.
 - *Note:* This is an important revision to make. Data may not display properly in the Caseload Overview unless you make this change.

- **How to perform this revision on your copy of the spreadsheet**

This revision will only work if you have not made changes to the original Caseload Overview worksheet (e.g., added or subtracted columns). If you have made changes to the number of columns, you will need to adjust the column references in the new code. It may help to compare your current code and the new code side-by-side. To make the revision to the macro:

- Open the *new* version of the spreadsheet template
- Press “Alt+F8” to open the Macro dialog box, and select “Edit” while “CopyPartOfFilteredRange” is highlighted
- Place your cursor in the text box and press “Ctrl+A” to highlight all text, then press “Ctrl+C” to copy it
- Exit the new version of the spreadsheet, and open your working version
- Save a backup of your working version of the spreadsheet before proceeding!
- Again, press “Alt+F8” to open the Macro dialog box, and select “Edit” while “CopyPartOfFilteredRange” is highlighted
- Place your cursor in the text box and press “Ctrl+A” to highlight all text, then press “Ctrl+V” to paste the new code over the old code
- Exit all dialog boxes, and press “Ctrl+J” to refresh the Caseload Overview

- **Revision:** Formula correction on Patient Tracking worksheet to rectify calculations for last patient block.
 - *Note:* This is an important revision to make. Data may not display properly in the Caseload Overview unless you make this change.

- **How to perform this revision on your copy of the spreadsheet**



- Go to the Patient Tracking worksheet and unprotect it
- Highlight the hidden columns at the end of the patient blocks (R-AB if you have not changed the number of columns from the template) and un-hide them
- In columns T and U (or whichever columns are named “Pre-Column J: Episode” and “Pre-Column J: Episode+MRN”) drag the formulas down **one** additional cell so that they extend to one row past the last patient block
- Re-hide the columns and re-protect the Patient Tracking worksheet

