



Tips and Best Practices for Using the Patient Tracking Spreadsheet

This guide contains tips and best practices to help you navigate general functionality of the Patient Tracking Spreadsheet. For a more in-depth guide to using the spreadsheet, please see the Test Patient Scenario.

Documenting a Patient Contact

The required fields for every new patient on the spreadsheet are MRN, Name, Treatment Status, Episode Number, and Actual Contact Date. To enter these items, first enter the MRN, Name, and Treatment Status into the white cells in the first row of the new patient record. (This is known as the Initial Assessment row, which provides you with a snapshot of where the patient started in the current episode of care.) Then, go down to the next (second) row and fill in the Episode Number (“1” if this the first time the patient has enrolled in care) and Actual Contact Date. The other white cells in this row should be filled out as well, but the aforementioned information is required for the spreadsheet to function properly. See pages 9-13 of the [Instructions](#) for further information on these columns.

Most documentation for the Initial Assessment and subsequent follow-up contacts will go directly into your EHR. However, some components, such as the PHQ-9 score, will be entered into the registry, and concurrent documentation is the most efficient way to do this. Generally the Care Manager Contact Notes section will only be used for critical pieces of information or notes about the patient’s care plan, but it is available to use however you find most useful.

Whenever scores (PHQ-9 or GAD-7) are not obtained during a session, make sure there is a period in the cell rather than leaving it completely blank, since a blank will register as a score of 0. If you leave the cell blank, or leave any other cells blank that must contain a value for the spreadsheet to function properly, the cell will turn red. If you see red cells anywhere on the spreadsheet—other than the “Past Due” reminder in the Tickler column—you must enter a value so that the Caseload Overview worksheet displays correctly.

Contact Attempts and Appointments

While your EHR is the best place to record contact attempts and appointments, you can optionally add them to the registry as well. The best way to do this is to put them in the Care Manager Contact Notes column, then change the font color to something that you can use consistently to differentiate contact attempts and appointments from other notes (e.g., contact attempts are blue, and appointments are red). Using “Alt+Enter” will allow you to start a new line of text within the same cell, which can make these more legible. See page 15 of the Instructions for further information on this option.

Be very careful **not** to enter upcoming appointments into the Actual Contact Date column; you should only enter a date once you have actually had contact with the patient, otherwise you will not be notified of past due appointments in the Tickler column if the scheduled appointment does not occur (e.g., missed, canceled, etc.).



Psychiatric Case Review: Using the Registry to Prioritize Patients

Both Care Manager and Psychiatric Consultant look at the registry during the consultation hour. To identify/prioritize patients and conduct reviews, you can sort by the headers on the Caseload Overview worksheet to identify patients by the severity of presentation, or who have had a consultation requested by a BHP/CM (flag), have not improved and do not have a psychiatric consultation note, are disengaged from care, or are ready for relapse prevention or referral.

To remove a flag, simply go to the patient's record in the Patient Tracking worksheet, click on the cell with the flag that you added, then press the "Delete" key.

Removing Ticklers

You can remove ticklers by entering a value of any kind in the Actual Contact Date column for the specific row in which the tickler appears. If a patient does not show up for an appointment, but you are unable to make contact, you may not want to remove the tickler right away, as it will serve as a reminder that you have not yet contacted the patient. However, if you successfully contact the patient after a missed appointment, entering something like "Missed" as the contact date will remove the tickler. Alternatively, you may prefer to just enter the follow-up contact date (when you successfully made contact with the patient) and make a note about the missed or canceled appointment(s). Just be careful not to remove the tickler if it has not been acted upon in order to prevent patients from falling through the cracks. See page 10 and pages 12-13 of the [Instructions](#) for further information on how ticklers and contact dates are calculated and interact.

