

# Spreadsheet Specialist Instructions: Patient Tracking Spreadsheet (Version 2)

## PLEASE READ BEFORE USE

The instructions below are **not** geared toward beginner-level Microsoft Excel users. They are intended for use by the organization's designated Spreadsheet Specialist—a staff member with strong Microsoft Excel skills, who ideally has familiarity with IF and INDEX/MATCH functions. The AIMS Center's Patient Tracking Spreadsheet contains a number of intricately linked formulas, and when worksheets are unprotected, these links are easily broken. The AIMS Center discourages pursuing **any** modifications to the spreadsheet without a designated Spreadsheet Specialist to help with this.

The AIMS Center only has capacity to provide very basic technical assistance on the spreadsheet *in its original form*. We are available to answer questions about general functionality in the original document, and we can provide clarification on content in the instructional resources. **We cannot, however, troubleshoot individualized technical issues that arise as a result of making structural modifications such as those outlined in this document. Making modifications to this free resource is the responsibility of the organization.** These instructions, although not comprehensive, provide steps to carry out frequently requested modifications. Modifications that are not outlined in these instructions are the organization's responsibility to execute.

**NOTE: Once you begin making customizations to the spreadsheet, column references may change. For each set of instructions below, you must pay careful attention to whether column references have changed from the original template, and adjust references to align with your working version.**

## Protected Worksheet Password

The password to unprotect and make edits to password-protected worksheets is **DataManager789**. Always re-protect (and re-hide, if necessary) the worksheet(s) in order to maintain the integrity of the many formulas and data links within the spreadsheet. If any formulas or links break, the patient data will not display correctly in the Caseload Overview worksheet.

## Original Macro to Refresh Data in Caseload Overview Worksheet (Ctrl+J)

If you need to revert back to the original VBA used for the macro in the spreadsheet (which “Ctrl+J” initiates), follow the link below to copy and paste it. Please note that if you encounter a run-time error, **it is likely best to start from scratch on a fresh version of the spreadsheet.**

## Circular References

When editing the Data Prep worksheet, you may encounter a warning regarding circular references. This warning should be harmless in this context, and you can find an explanation for this warning below. If you are unsure whether the warning is due to something you changed in the spreadsheet, you can test it by using the last paragraph below:

The initial PHQ-9 score for each patient block—the purple cell in Column M (Patient Tracking)—depends on a value in Column Z (Patient Tracking), which depends on values listed in Column S (Data Prep), which loops back around and depends on values in **all of** Column M (Patient Tracking)—not just the purple cell. This is actually okay because the formula in Column S (Data Prep) essentially rules out the purple cell in Column M (Patient Tracking), as Column S (Data Prep) pulls values from Column X (Data Prep), which fills in a blank value for the initial assessment row of Column M (Patient Tracking)—the purple cell noted in the very beginning. The other values in Column M (Patient Tracking) are hand-entered (not formulas), so the circular reference does not apply to these values. **This logic also applies to GAD-7 scores.**

To confirm that this is the source of the circular reference, you can change the formulas in the purple cells of the PHQ-9 and GAD-7 columns on the Patient Tracking worksheet to refer to cells without any data at all (e.g., replace references to X and Y with BB and BC). After doing this for both PHQ-9 and GAD-7, you should no longer get the circular reference warning when making changes on the Data Prep worksheet (you may have to save, exit, and reopen the spreadsheet).

## Backup/Replacement Caseload Overview Worksheet

There is a hidden worksheet in the template called “BACKUP – Caseload Overview.” If the original Caseload Overview worksheet stops working for any reason, try the following before going through the trouble of transferring the caseload to a new copy of the spreadsheet. (Please note that this only works if you want to revert back to the original Caseload Overview worksheet; if you have made modifications to the columns, they will not be reflected in the backup version.)

1. Unhide the worksheet called “BACKUP – Caseload Overview.”
2. Create a copy of “BACKUP – Caseload Overview” and re-hide the original worksheet.
3. Delete the broken “Caseload Overview” worksheet, and rename the copied backup version to be “Caseload Overview.”
4. Press “Ctrl+J” to refresh the Caseload Overview.
5. If a runtime error still occurs, you can either try figuring out what the issue is in the macro (and possibly try reentering the macro as shown on page 2), or you can transfer the caseload to a new copy of the spreadsheet.



## De-identify Caseload Overview Worksheet (Change Name Field to MRN)

To *temporarily* display de-identified information (for printing or on-screen display purposes ONLY), you can simply unhide Column D on the Caseload Overview worksheet, and hide Column C; these columns will revert to the original setting when the report is refreshed again (Ctrl+J).

The following instructions can be used if your organization prefers to have the Caseload Overview worksheet *permanently* display de-identified information using patient Medical Record Numbers (MRNs) rather than names. Please note that this does NOT remove names from the report; rather it hides them for printing or on-screen display purposes ONLY. If a de-identified Caseload Overview needs to be sent or distributed in any way, please instead refer to the section on page 16 of the Care Manager Instructions.

To change the report such that it displays MRNs rather than names every time it is refreshed:

### **IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES**

1. Press “Alt+F8” to open the Macro dialog box, and select “Edit” while “CopyPartOfFilteredRange” is highlighted
  - a. Under the green text for “Hide MRN column from view in CO table (can be manually unhidden if desired)” change the range “(D:D)” to “(C:C)”
2. Refresh the Caseload Overview using “Ctrl+J” – **you will need at least two “Active” patients entered on the Patient Tracking worksheet for this part; enter fake data if none is available**



## Create Additional Patient Blocks

**IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES**

A short video (no audio) that demonstrates these steps can be found here (may need to let it buffer to resolve blurriness): <https://vimeo.com/226984731/22f755dea9>

1. Unprotect the “Patient Tracking” worksheet
2. Unhide the “Data Prep” and “Caseload Overview – DO NOT EDIT” worksheets, then unprotect the “Data Prep” worksheet
3. Fully highlight the last patient block on the “Patient Tracking” worksheet, **and include at least one additional column to the right of the block**—there are formulas in hidden columns that you need to make sure you capture
4. Copy and paste directly below in the next empty cell of Column A as many times as needed to add patient blocks.
5. Once you have added the number of patient blocks that you want, unhide the hidden columns to the right of the patient blocks. For the very last patient block, drag the formulas for “Pre-Column J: Episode” (value should be 0) and “Pre-Column J: Episode+MRN” (value should be Opt) down **one extra row**. This should eliminate any error values that appear in the last patient block. Re-hide the columns and re-protect the “Patient Tracking” worksheet.
6. Find the row number for the last usable row on the “Patient Tracking” worksheet (i.e., the last row before you reach blank cells). Add 50 to this number and write it down to refer to later.
7. Go to the “Data Prep” worksheet. Highlight the cells in **Row 1630** from Column A through the last column (make sure to capture any column with a header—not just ones that have data in them), then drag the formulas down the rows **until you reach the row number you calculated in step 6**. Re-protect this worksheet and then re-hide it when finished.
8. Go to the “Caseload Overview – DO NOT EDIT” worksheet. Select the filter in the “Treatment Status” column, and click the checkbox for “Select all.” Click OK. Do the same thing for the “Last Available PHQ-9 Score” column.
9. Add 3 to the same row number that you calculated in step 6. Highlight the last populated row on the “Caseload Overview – DO NOT EDIT” worksheet and drag the formulas down to this newly calculated row number (3 + number from step 6), much like you did on the “Data Prep” worksheet in step 7.
10. Select the filter in the “Last Available PHQ-9 Score” column, and deselect the checkbox for “(Blanks).” Click OK. Select the filter in the “Treatment Status” column, and deselect the checkbox for “0.” Click OK. Re-hide this worksheet (but do NOT protect it).
11. Add a fake active patient to the last patient block on the “Patient Tracking” worksheet (and ensure there is at least one other active patient on the worksheet), then press “Ctrl+J” to refresh the Caseload Overview. Make sure that the fake patient appears, and then delete the fake data from the patient block.



## Add More Follow-up Contact Rows to a Patient Block

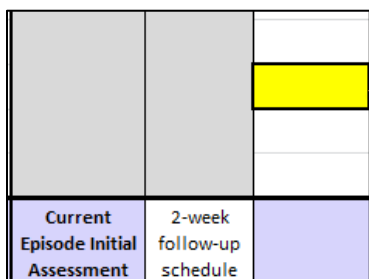
**Note:** If you need to add rows to a large number of patient blocks (more than 5-10) and expect that you'll need more additions after that, it may be more worthwhile to start from a fresh copy of the spreadsheet and add new rows to *all* patient blocks at one time, as adding rows individually is one of the more complicated and tedious modifications you can make to the Patient Tracking Spreadsheet.

If you decide to add rows to all patient blocks on a blank spreadsheet: **1)** Add the desired number of rows to a single patient block, following steps 1-13 in the instructions below **2)** Highlight the block you modified (plus **at least one extra column to the right of the block**—see step 3 in the section above for 'Create Additional Patient Blocks' **3)** Copy and paste the block (plus one extra column) over all existing patient blocks to overwrite them until you have as many blocks as you need **4)** In the section above for 'Create Additional Patient Blocks,' perform step 5 *only* **5)** Jump to step 15 in the instructions below and follow steps 15 through the end.

### IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES

#### Patient Tracking worksheet

1. Unprotect the "Patient Tracking" worksheet
2. Unhide the "Data Prep" and "Caseload Overview – DO NOT EDIT" worksheets, then unprotect the "Data Prep" worksheet
3. On the "Patient Tracking" worksheet, go to a patient block where you want to add more rows.
4. Find the "Actual Contact Date" column, and click on the cell that's in the last row of the patient block to which you are adding rows. Then, go two rows up from this cell, and color that cell yellow (see below). This will serve as a reference point for the instructions that follow.




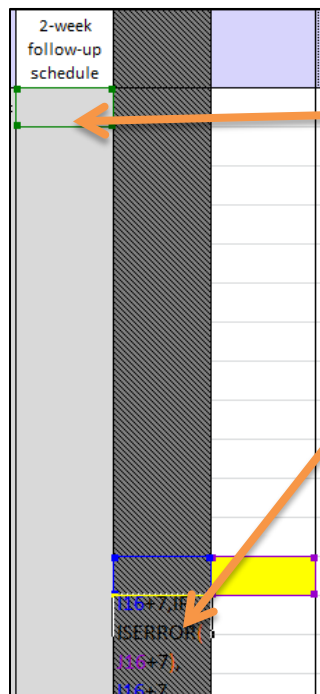
Current Episode Initial Assessment	2-week follow-up schedule	

Create a reference point in the "Actual Contact Date" column using the cell that is three rows from the bottom of the patient block.

5. Highlight the entire last row of the patient block by clicking the row number on the left-hand side—make sure to do this rather than dragging the cursor to highlight the row.
6. Insert one row, then without changing the highlighted row, press "Ctrl+Y" to insert additional rows
7. If there was any patient data entered in the white cells in the last contact row, transfer this data to a new document temporarily until the very end of these instructions. If there is no visit data in the last row, you can skip this step.
8. Unhide the hidden column between "Date Follow-up Due" and "Actual Contact Date"
9. Go to the row that contains your yellow reference cell from step 4. Highlight the **entire row** by clicking the row number on the left-hand side, and copy it. (Ensure you are capturing the entire worksheet row and not just the cells within the patient block.)
10. Using the row numbers on the left-hand side again, highlight all rows in the patient block that are *underneath the highlighted row*, including the bottom row that still has some data, and paste **formulas only** by selecting the "fx" icon from the paste options.
11. If there is any, remove all data in the *white cells only* underneath the row that you copied (periods in the score columns don't matter).



12. In the cells that contain formulas, you will need to adjust some of the cell references
  - a. In the dark grey column that was originally hidden in step 6 (Column I if using an unmodified spreadsheet):
    - i. Find the first row **underneath** the yellow reference cell, and double-click the dark grey date cell to edit the formula. (See below for illustration of this step.)
    - ii. Find the colored outline of a cell in the light grey “Date Follow-up Due” column underneath the follow-up schedule in the first row—**not** in the dark grey “Date Follow-up Due” column that was hidden).
    - iii. Move your cursor to the edge of the colored outline until you see the cursor with 4 arrows  then drag the colored outline up to the cell with the follow-up schedule (e.g., “2-week follow-up schedule”).
    - iv. There will be a second colored box in the same cell; do the same action with this one, dragging it to the follow-up schedule cell.



ii. Find the colored outline of a cell in the light grey “Date Follow-up Due” column underneath the follow-up schedule and move your cursor to the edge of the colored outline until you see the cursor with 4 arrows

i. Double-click the dark grey cell **underneath** the row with the yellow reference cell

- v. Press “Enter” to save the formula change, and double-click the same cell again to make sure that the reference was properly changed. If so, press “Esc” to exit the formula.
- vi. Repeat the above steps in all remaining cells in the dark grey column for this patient block

- b. In the “% Change” columns for scores, you will also need to adjust cell references:
  - i. Similar to above, find the first row **underneath** the yellow reference cell, and double-click the cell in the “% Change in PHQ-9 score” column. Drag the cell with the colored outline (it’s near the top of the “PHQ-9 score” column) to the purple score in the first row. (If you’re unsure where the colored outline should be placed, you can double-click cells that display percentages in prior rows to see where they are supposed to be.)
  - ii. Repeat this for all remaining cells in all “% Change” columns that appear on the worksheet (e.g., for PHQ-9, GAD-7, and any other scales you may have added).

13. You can now remove the yellow reference cell you created (i.e., remove the yellow coloring).



14. Repeat steps 1-13 for any other patient blocks to which you need to add follow-up contact rows, BEFORE moving on to the remainder of the instructions.
15. Once you have added all of the additional rows on the spreadsheet that you need to, find the row number for the last usable row on the “Patient Tracking” worksheet (i.e., the last row before you reach blank cells). Add 50 to this number and write it down to refer to later.

### **Data Prep worksheet**

16. On “Data Prep” worksheet, highlight cells in **Row 1630** from Column A through the last column (make sure to capture every column with a header—not just ones that have data in them), then place your cursor at the bottom-right corner of the highlighted box to display the black plus sign. Click, hold, and drag the formulas down the rows **until you reach the row number you calculated in step 15**.

*To make them easier to follow, the steps below will work from left to right in the columns on the “Data Prep” worksheet.*

*(NOTE regarding circular reference warning: You shouldn’t need to worry about the warning, but see the section on page 2 about “Circular References” for an explanation of why this occurs.)*

17. Back at the top of the “Data Prep” worksheet, highlight cells in Row 2 up until you reach the column with the header “current episode” (exclude this column)
  - a. Place your cursor at the bottom-right corner of the highlighted box to display the black plus sign, and drag these formulas to the bottom row
18. Starting with the column with the header “current episode,” highlight cells in Row 2 up until you reach the column with the header “find initial PHQ-9 score” (exclude this column)
  - a. Place your cursor at the bottom-right corner of the highlighted box to display the black plus sign, and drag these formulas to the bottom row
19. Place your cursor in **Row 18** of the “find initial PHQ-9 score” column, and drag these formulas to the bottom row
20. Repeat step 19 (above) for **Row 18** of the “find initial GAD-7 score” column and the “find initial score” columns of any other scales you may have added
21. Starting with the column directly after the “find initial score” columns, highlight cells in Row 2 up until you reach the column with the header “PHQ-9 score” (exclude this column)
  - a. Place your cursor at the bottom-right corner of the highlighted box to display the black plus sign, and drag these formulas to the bottom row
22. Starting with the “PHQ-9 score” column, highlight cells in Row 2 through the final column with a column header
  - a. Place your cursor at the bottom-right corner of the highlighted box to display the black plus sign, and drag these formulas to the bottom row
23. Re-protect this worksheet and then re-hide it when finished

### **Caseload Overview worksheet**

24. Go to the “Caseload Overview – DO NOT EDIT” worksheet. Select the filter in the “Treatment Status” column, and click the checkbox for “Select all.” Click OK. Do the same thing for the “Last Available PHQ-9 Score” column.
25. Add 3 to the same row number that you calculated in step 15. Highlight the last populated row on the “Caseload Overview – DO NOT EDIT” worksheet and drag the formulas down to this newly



calculated row number (3 + number from step 15), much like you did on the “Data Prep” worksheet in step 16.

26. Select the filter in the “Last Available PHQ-9 Score” column, and deselect the checkbox for “(Blanks).” Click OK. Select the filter in the “Treatment Status” column, and deselect the checkbox for “0.” Click OK. Re-hide this worksheet (but do NOT protect it).
27. Add the data back into the patient block(s) that you set aside in step 7. You can also remove any yellow reference cells you created.
28. Make sure there are **at least two “Active” patients** entered on the Patient Tracking worksheet (and enter fake data if not). Press “Ctrl+J” to refresh the Caseload Overview, and check a few patients to make sure the data displays correctly, particularly for patients where you added rows.

## Revise Drop-Down Menu Options for “Type of Contact”

**IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES**

1. Unprotect Patient Tracking worksheet
2. Click on a data entry cell in the “Type of Contact” column
3. Go to the Data toolbar, and click on “Data Validation”
4. Select the checkbox for “Apply these changes to all other cells with the same settings”
5. Revise the text in the “Source” field to meet your needs, separating each menu item with a comma (do not insert spaces between menu items)
6. Click OK to save your changes
7. Re-protect the Patient Tracking worksheet

## Revise “Treatment Status” Options on Patient Tracking Worksheet and Define Statuses that Appear in the Default Caseload Overview Sort

**IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES**

1. Unprotect Patient Tracking worksheet
2. Unhide and unprotect the Data Validations Lists worksheet
3. In the Data Validation Lists worksheet, revise the treatment statuses listed in column A to create your desired list of options in the order that you would like them to appear
4. On the Patient Tracking worksheet, click on a white cell in the “Treatment Status” column
5. Go to the Data toolbar, and click on “Data Validation”
6. Select the checkbox for “Apply these changes to all other cells with the same settings”
7. In the “Source” field, click the selection button to the right of the field—this should take you to highlighted cells on the Data Validation Lists worksheet
8. Select the range of cells that contain your revised treatment statuses. If done correctly, the “Source” field should now read something like: =’Data Validation Lists!’\$A\$1:\$A\$4
9. After highlighting the appropriate cells, click on the selection button to the right of the field again to go back to the Data Validation window. Check that the “Source” field contains the correct range of cells, and then click OK to save your changes.
10. Re-protect the Patient Tracking worksheet
11. Re-protect and re-hide the Data Validation Lists worksheet
12. *Optional:* If any of your new treatment statuses are on the longer side, and you want to create abbreviations for them that will be displayed in the Caseload Overview (e.g., Relapse Prevention =





- RP), you can do so by modifying the formula on the Data Prep worksheet in the column for “Treatment Status Abbrev” (column B). Re-protect and re-hide the worksheet when finished.
13. Determine which treatment statuses you are actively tracking and therefore need to appear in the Caseload Overview (e.g., prior to revising the statuses, only “Active” and “Relapse Prevention” patients showed up in the Caseload Overview)
  14. Press Alt+F8 to open the Macro dialog box, and click Edit
  15. Press Ctrl+F and search for “Array” to bring you to the line that lists all of the previous treatment statuses. Revise the text inside the parentheses () to match your revised treatment statuses **exactly as they are written**. If you created abbreviations for any of the treatment statuses (see optional step 12), then use the abbreviations instead. (This means if you kept “Relapse Prevention” as a treatment status, you should leave it as “RP” here.) Each treatment status needs to be in quotation marks “ ” then followed by comma and a space—do not put the comma inside the quotation marks.
  16. Search for “Array” again, or scroll down to the bottom of the macro to find the second instance with treatment statuses listed. This second instance defines which treatment statuses will be displayed by default in the Caseload Overview (see step 13). Using the same formatting as the previous step, enter all treatment statuses that you need to be displayed in the Caseload Overview. All other treatment statuses will still be available to view if you select them from the filter in the Treatment Status column, but they will not appear by default (e.g., the way in which the “Inactive” treatment status can be displayed if selected from the filter)
  17. Exit the dialog box and return to the spreadsheet view. Assign revised treatment statuses to test patients in the Patient Tracking worksheet and ensure they display correctly in the Caseload Overview when refreshed.



## Revise “Follow-up Schedule” Options and Calculations

**IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES**

1. Unprotect Patient Tracking worksheet
2. Unhide and unprotect the Data Validations Lists worksheet
3. In the Data Validation Lists worksheet, revise the schedules listed in column B to create your desired list of options in the order that you would like them to appear
4. On the Patient Tracking worksheet, click on a white cell in the “Date Follow-up Due” column
5. Go to the Data toolbar, and click on “Data Validation”
6. Select the checkbox for “Apply these changes to all other cells with the same settings”
7. In the “Source” field, click the selection button to the right of the field—this should take you to highlighted cells on the Data Validation Lists worksheet
8. Select the range of cells that contain your revised schedule options. If done correctly, the “Source” field should now read something like: =’Data Validation Lists’!\$B\$1:\$B\$4
9. After highlighting the appropriate cells, click on the selection button to the right of the field again to go back to the Data Validation window. Check that the “Source” field contains the correct range of cells, and then click OK to save your changes.
10. On the Patient Tracking worksheet, unhide column I, or the hidden column between “Date Follow-up Due” and “Actual Contact Dates” (this is a calculation column for Date Follow-up Due and should be all grey)
11. Skipping the cell in the Initial Assessment row that has no formula, go down to the second cell in the calculation column (see below)

2-week follow-up schedule		4/1/17
	4/15/17	4/1/17
	4/15/17	4/15/17

12. The formula in this cell is essentially broken up into three sections for the three follow-up schedule options of 1 week, 1 month, and the default of 2 weeks if neither of those is entered:

=IF(H3="1-week follow-up schedule",IF(J3=""," ",IF(ISERROR(J3+7)," ",J3+7)),

IF(H3="1-month follow-up schedule" IF(J3=""," ",IF(ISERROR(J3+30)," ",J3+30)),

IF(J3=""," ",IF(ISERROR(J3+14)," ",J3+14))))

13. Whatever your “default” schedule should be (i.e., how dates are calculated if the care manager does not specify otherwise) should be the timeframe entered in the green box shown above. In this case, the default is 2 weeks, so it adds 14 days. If you would like to change the default calculation, revise both instances of “14” in the green part of the formula.
14. If you have maintained 1-week or 1-month schedule options (shown in orange and blue above), you can leave these parts of the formula alone. If you are **not** using one or both of these, you can replace them by changing the text in the quotation marks “ ” to match your new schedule option **exactly as it is written**. Then, change the number of days in both places.



15. If you need to add more options to the formula (for more than three schedule options), you will need to insert another IF statement following the same format as the blue line (entire second line) of the formula, and then add another closing parenthesis at the very end of the formula, following the green section.
16. Press Enter to save your changes and go down to the next cell in the calculation column. The first cell and the remainder of the cells in this column differ in the formula they use. You will revise the formula in this cell (shown below) similarly to how you revised the formula in the first cell (either replace one of the options or copy the entire second/blue line to add an option), but note that there are four places rather than two places where you will need to change the number of days for each schedule option:

=IF(I4=" ", " ", (IF(H3="1-week follow-up schedule", F(J4="I4+7,IF(ISERROR(J4+7),I4+7,J4+7)),

IF(H3="1-month follow-up schedule", IF(J4="I4+30,IF(ISERROR(J4+30),I4+30,J4+30)),

IF(J4="I4+14,IF(ISERROR(J4+14),I4+14,J4+14))))))

17. Once you revise the formula, you'll need to drag it down to the other cells **within the same patient block**. Stop once you get to the bottom of the current patient block.
18. For all of the formulas that you just copied, you will need to change all of the references to column H (there are two references to cell H3 in the formula above) so that they refer to the white cell with the follow-up schedule that you selected in the "Date Follow-up Due" column. You can either double-click the cell and manually change the cell references in the formula, or you can double-click it and drag the colored boxes in column H to the white cell with the follow-up schedule.
19. After you are finished revising the formulas in this patient block, you will then copy all of the cells you revised in the grey calculation column and copy/paste them into subsequent patient blocks until you have populated all of the patient blocks on the spreadsheet with the new formulas.
20. Re-hide the grey calculation column
21. Re-protect the Patient Tracking worksheet
22. Re-protect and re-hide the Data Validation Lists worksheet

## Add a Column to Patient Tracking Worksheet Only – Does NOT apply to new measurements/scales (see "Add a New Measurement/Scale")

### IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES

1. Unprotect Patient Tracking worksheet
2. Insert the column where you would like it to appear, but do not insert it between any columns with filters in the headers (as they will no longer filter data correctly if you do so)
3. Color the cells in the column appropriately (i.e., grey cells contain formulas that display necessary information, shaded cells do not display necessary information, purple cells indicate Initial Assessment Information, and white cells are for users to enter data)
4. Lock all cells that are not intended to have data entered in them, and then re-protect the Patient Tracking worksheet



## Add a Column to Caseload Overview Worksheet from an Existing Column on Patient Tracking Worksheet – Does NOT apply to new measurements/scales (see “Add a New Measurement/Scale”)

The easiest, least complicated way to add something to the Caseload Overview is if it appears in the Initial Assessment (purple) row on the Patient Tracking worksheet. That being said, you can add data from anywhere, but it requires extra data manipulation. The instructions below outline how to add items that appear in the Initial Assessment row on the Patient Tracking worksheet to the Caseload Overview worksheet.

**IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE MAKING CHANGES**

### Data Prep worksheet

1. Unhide sheet
2. Unprotect sheet (Password: DataManager789)
3. Add a grey column before column AT, or right before there is a yellow column that separates data for the Statistics worksheet. Copy the column on the Patient Tracking sheet that contains the values you want to add, and then paste as a **link** (in Paste Special) into the grey column you added.
4. In the next blank column at the end of the worksheet, enter this formula into Row 2, *assuming that the grey column you added in step 3 was Column AT (adjust this formula as needed if it is not Column AT):* =IF(T2="initial score"&C2,AT2,IF(C2=C1,AT1,""))
5. Copy this formula to the end of the column
6. Add appropriate headings to the columns in Row 1
7. Re-protect the worksheet and hide it

### Caseload Overview worksheet

8. Unhide the worksheet called “Caseload Overview – DO NOT EDIT” (you are going to edit it, so be very careful with these steps)
9. Choose the checkbox for “Select All” for the filters on the “Treatment Status” column and the “Last Available PHQ-9 Score” column
10. Insert a new column where you want the new information to appear, but **DO NOT** insert the column before “Treatment Status” (Column A). Create a column header for the new column.
11. In Row 3, enter this formula, *if AR is the column you assigned to step 4 for the Data Prep worksheet:* ='Data Prep'!AR2
12. Copy the formula down the table column
13. Switch to the regular “Caseload Overview” worksheet, and insert a column in the same place you had on the “Caseload Overview – DO NOT EDIT” worksheet
14. Copy and paste the new column headers you created on the “Caseload Overview – DO NOT EDIT” worksheet onto the “Caseload Overview” worksheet
15. Revise the Macro, being very careful not to change anything other than the below:
  - a. Press “Alt+F8” to open the Macro window, the select “Edit” while “CopyPartOfFilteredRange” is highlighted
  - b. **The following steps apply to adding one column to the Caseload Overview worksheet. For each additional column, increase by one letter alphabetically** (e.g., to add one column use the range A:T, but to add two columns use the range A:U).
  - c. Under the green text for “UnHide all columns” change the range from “A:S” to “**A:T**”



- d. Under the green text for “clear existing data in outdated CO table, except for first row” change the range from “A6:S” to “**A6:T**”
  - e. Under the green text for “set the range to apply filters to on ‘CO - DO NOT EDIT’ worksheet (all columns)” change the range from “A4:R” to “**A4:S**,” and then change the range in the next section from “A5:R” to “**A5:S**”
  - f. Under the green text for “define the table range w/ header and table range w/o header on the new CO table” change the range from “A4:S” to “**A4:T**” and in the following row change “A5:S” to “**A5:T**”
  - g. Looking at the **Caseload Overview – DO NOT EDIT** worksheet, compare the following column placements to the columns on your worksheet to determine if additional Macro changes are needed:
    - i. Is “Last Available PHQ-9 Score” in **Column J**? If not, find the green text for “this step narrows down the data.” Three lines down from that, change the text that reads **AutoFilter Field:=10** to reflect the actual column number for “Last Available PHQ-9 Score” (Column A is the equivalent of Field 1, Column J is the equivalent of Field 10, etc.)
    - ii. Is “Date of Last PHQ-9 Score” in **Column L**? If not, find the green text for “change Column L (date of last PHQ-9) to date format” and change any instance of “L” to the actual column for “Date of Last PHQ-9 Score”
  - h. Looking at the **Caseload Overview** worksheet, compare the following column placements to the columns on your worksheet to determine if additional Macro changes are needed:
    - i. Is “MRN” in **Column D**? If not, find the green text for “Hide MRN column from view in CO table” and change the instances of “D” to the actual column for “MRN”
    - ii. Is “Date Next Follow-up Due” in **Column G**? If not, find the green text for “Reset filters and apply new filters to remove Inactive tx status” and replace the letter “G” in **tgt.Range("G4")** with the actual column for “Date Next Follow-up Due”
16. Make sure there are **at least two “Active” patients** entered on the Patient Tracking worksheet (and enter fake data if not)
  17. Press “Ctrl+J” to refresh everything, and then re-hide the “Caseload Overview – DO NOT EDIT” worksheet
  18. Make a copy of this worksheet/tab, and save it as “Caseload Overview – BACKUP 2,” then hide this tab from view

## Add a New Measurement/Scale (e.g., PHQ-9, GAD-7, etc.)

**IMPORTANT:** PHQ-9 scores are critical to functionality in this registry tool. Every patient must have at least one PHQ-9 score entered in order for any other measurements to populate in the Caseload Overview worksheet. Therefore, the PHQ-9 columns cannot be removed from the template and must be used at least once for every patient.

This is one of the more complicated modifications you can make to the Patient Tracking Spreadsheet, so be VERY careful and make sure that you capture ALL steps.

**IF YOU HAVE ANY PATIENT DATA ENTERED, SAVE A BACKUP BEFORE ADDING A NEW SCALE**

### Patient Tracking worksheet: Part 1

1. Unprotect sheet



2. Insert two new columns where you want the new scale to appear under the “Measurements” heading
3. Copy the columns for GAD-7 and paste them in the new columns
4. Rename the new columns to match those for GAD-7 and PHQ-9, and adjust the text regarding targets accordingly
5. Revise data validation on the first column you created (where scores will be entered)
  - a. Highlight the column and clear the current data validation (on the Data toolbar)
  - b. Create new data validation for the column with the following settings:

The screenshot shows the 'Data Validation' dialog box with the following settings:

- Settings:** Settings, Input Message, Error Alert
- Validation criteria:**
  - Allow:** List
  - Ignore blank
  - In-cell dropdown
  - Data:** between
  - Source:** .,0,1,2,3,4
- Apply these changes to all other cells with the same settings
- Buttons:** Clear All, OK, Cancel

- c. For the “Source” field, the values listed should include “.” and all possible scores for the scale
  - d. Save the data validation, and then click on the purple cell in Row 3 only and reopen the data validation dialog box. Select “Input Message,” then make the title “Initial *new scale* Score,” and make the input message “This cell displays the initial *new scale* score for the current episode of care.”
6. Remove or revise conditional formatting for your new scale columns to reflect indicators for target scores (e.g., turns green if less than a certain value). See the top of page 18 for a suggested method of selecting cells to change conditional formatting. **DO NOT** change conditional formatting for red cells, only green ones.



## Data Prep worksheet

7. Unhide sheet
8. Unprotect sheet
9. Add grey column for new measurement score, like those labeled “PHQ-9 Score” and “GAD-7 Score” located after the white “Weeks in Treatment” column
  - a. Formula in Row 2: =IF(E2="current episode initial assessment", "", 'Patient Tracking!'&M3)
  - b. Substitute red “M” with the column on the Patient Tracking worksheet that contains the actual score (see step 5)
  - c. Apply formula to remainder of column
10. Add a “check for score” column like the grey columns labeled “check for GAD-7 score” and “check for PHQ-9 score” located after the white “Next Follow-up due” column
  - a. Formula in Row 2: =IF(AND(Z2<>"", Z2<>""), "PHQSCORE"&G2, "None")
  - b. Substitute red “Z” with the grey column assigned to the new score in step 9. (You want the column on the Data Prep worksheet, not the Patient Tracking worksheet.)
  - c. Substitute “PHQSCORE” with your new scale followed by “SCORE” (e.g., “GADSCORE” for GAD-7).
  - d. Apply formula to remainder of column
11. Add a “find initial score” column like the grey columns labeled “find initial GAD-7 score” and “find initial PHQ-9 score” located after the “check for score” columns in step 10
  - a. Formula in Row 2:  
=IF(AND(Z2>=0, Z2<=27, R2="PHQSCORE"&C2&"TRUE", ISNA(MATCH("PHQSCORE"&G2, R1, 0))), "Initial Score"&C2, "")
  - b. Substitute red “Z” with the grey column assigned to the new score in step 9. (You want the column on the Data Prep worksheet, not the Patient Tracking worksheet.)
  - c. Substitute red “0” and “27” with the limits of the new scale (e.g., PHQ-9 scores are 0-27).
  - d. Substitute red “R” with column assigned to “check for score” column in step 10
  - e. Substitute red “PHQSCORE” with the same text assigned in step 10c (must match exactly).
  - f. Apply formula to remainder of column
12. Add an “Initial Score” column like the white “Initial GAD-7 Score” column
  - a. Formula in Row 2: =IF(U2="initial score"&C2, AA2, IF(AND(C2=C1, AG1>=0, AG1<=21), AG1, IF(Q2="none", "No Score", "")))
  - b. Substitute red “U” with “find initial score” column assigned in Step 11
  - c. Substitute red “AA” with the grey column assigned to the new score in step 9. (You want the column on the Data Prep worksheet, not the Patient Tracking worksheet.)
  - d. Substitute red “AG” with the column you are currently in as of step 12 (i.e., the column you have assigned for the “Initial ‘new scale’ Score”)
  - e. Substitute red “0” and “21” with the limits of the new scale (e.g., GAD-7 scores are 0-21).
  - f. Substitute red “Q” with column assigned to “check for score” column in step 10
  - g. Apply formula to remainder of column
13. Add a “PRE-Last Available ‘new scale’ Score” column like the grey “PRE-Last Available GAD-7 Score” column
  - a. Formula in Row 2:  
=IF(AND(C2=C1, AA2>=0, AA2<=21, G2=C2&"TRUE"), IF(ISNA(MATCH(Q2, Q3:Q75, 0)), AA2, "-100"), "-100")
  - b. Substitute red “AA” with the grey column assigned to the new score in step 9. (You want the column on the Data Prep worksheet, not the Patient Tracking worksheet.)



- c. Substitute red "0" and "21" with the limits of the new scale (e.g., GAD-7 scores are 0-21).
  - d. Substitute red "Q" with column assigned to "check for score" column in step 10
  - e. Apply formula to remainder of column
14. Add a "PRE2-Last Available 'new scale' Score" column like the grey "PRE2-Last Available GAD-7 Score" column
- a. Formula in Row 2: =MAX(IF(Q2:Q75="GADSCORE"&G2,AH2:AH75,IF(C2=C1,AI1,"-100"),"-100"))
  - b. Substitute red "Q" with column assigned to "check for score" column in step 10
  - c. Substitute red "GADSCORE" with the same text assigned in step 10c (must match exactly).
  - d. Substitute red "AH" with column assigned to "PRE-Last Available Score" column in step 13
  - e. Substitute red "AI" with the column you are currently in as of step 14 (i.e., the column you have assigned for the "PRE2-Last Available 'new scale' Score")
  - f. **IMPORTANT:** After typing in this formula you must press "Ctrl+Shift+Enter" to activate the =MAX function. If you do this properly, curly brackets { } will appear around the formula. If you do not see the brackets, double-click on the cell, then press "Ctrl+Shift+Enter"
  - g. Apply formula to remainder of column
15. Add a "Last Available 'new scale' Score" column like the white "Last Available GAD-7 Score" column
- a. Formula in Row 2: =IF(AI2=-100,"No Score",AI2)
  - b. Substitute red "AI" with column assigned to "PRE2-Last Available Score" column in step 14
  - c. Apply formula to remainder of column
16. Add a "'New scale' % Dec" column like the white "GAD % Dec" column
- a. Formula in Row 2: =IF(AND(AJ2<=21,AJ2>=0),(AJ2/AG2)-1,"")
  - b. Substitute red "AJ" with column assigned to "Last Available 'new scale' Score" column in step 15
  - c. Substitute red "0" and "21" with the limits of the new scale (e.g., GAD-7 scores are 0-21).
  - d. Substitute red "AG" with "Initial 'new scale' Score" column assigned in step 12
  - e. Apply formula to remainder of column
17. Insert two new columns after the column you added in step 16. Name one of them "PRE-Date of last 'new scale'" and the other "Date of last available 'new scale'"
- a. Formula in Row 2 of **first** column:  
=MAX(IF(Q2:Q75="GADSCORE"&C2&"TRUE",L2:L75,IF(C2=C1,AM1,"")))
  - b. Formula in Row 2 of **second** column: =IF(AL2<>0,AL2,"")
  - c. Substitute red "Q" with column assigned to "check for score" column in step 10
  - d. Substitute red "GADSCORE" with the same text assigned in step 10c (must match exactly)
  - e. Substitute red "AM" with the *second* column you created in step 17
  - f. Substitute red "AL" with the *first* column you created in step 17
  - g. **IMPORTANT:** After typing in the formula in the **first** column you must press "Ctrl+Shift+Enter" to activate the =MAX function. If you do this properly, curly brackets { } will appear around the formula. If you do not see the brackets, double-click on the cell, then press "Ctrl+Shift+Enter"
  - h. Apply both formulas to remainder of each column





## Patient Tracking worksheet: Part 2

18. Unhide the columns that are hidden after the last column of the Patient Tracking worksheet
  - a. After the columns titled “Column N” and “Column N no score,” add two columns with the same names, replacing “N” with the columns you created for the new scale in step 2
  - b. Enter this formula in Row 3 of the **first** column you added in step 18a: =MAX(IF('Data Prep'!U2:U60="initial score"&'Patient Tracking'!A3,'Data Prep'!AG2:AG60,""))
    - i. Substitute red “U” with column assigned to “find initial score” column on the **Data Prep** worksheet in step 11
    - ii. Substitute red “AG” with column assigned to “Initial Score” column on the **Data Prep** worksheet in step 12
    - iii. **IMPORTANT:** After typing in the formula in the first column you must press “Ctrl+Shift+Enter.” If you do this properly, curly brackets { } will appear around the formula. If you do not see the brackets, double-click on the cell, then press “Ctrl+Shift+Enter”
    - iv. **DO NOT** apply this formula to additional cells yet
  - c. Enter this formula in Row 3 of the **second** column you added in step 18a: =IF(ISNA(MATCH("initial score"&'Patient Tracking'!A3,'Data Prep'!U2:U60,0)),"No score","")
    - i. Substitute red “U” with column assigned to “find initial score” column in step 11 for the **Data Prep** worksheet
    - ii. **IMPORTANT:** After typing in the formula in the second column you must press “Ctrl+Shift+Enter.” If you do this properly, curly brackets { } will appear around the formula. If you do not see the brackets, double-click on the cell, then press “Ctrl+Shift+Enter”
    - iii. **DO NOT** apply this formula to additional cells yet
  - d. Go to the purple cell in Row 3 for the column you created in step 2 under the “Measurements” heading
    - i. Enter this formula in the purple cell: =IF(AA3="no score",AA3,Z3)
    - ii. Substitute red AA with the **second** column you created in step 18a
    - iii. Substitute red Z with the **first** column you created in step 18a
19. If this is a blank spreadsheet (does not contain any patient data yet), proceed with steps **19a-b**. If the spreadsheet is populated with patient data, proceed with steps **19c-f**.
  - a. **Blank spreadsheet:** Highlight Row 3 through Row 18 to capture the entire first patient block, making sure to capture all purple cells as well
  - b. Copy and paste the cells into each patient block all the way down the spreadsheet, then re-hide the entire section at the end of the spreadsheet when finished pasting so that only the patient data columns are displayed (as it originally looked)
  - c. **Spreadsheet with data:** In the two new columns created in step 18a *only* (the hidden ones), highlight Row 3 through Row 18 (or however many rows you have for a single patient block)
  - d. Copy and paste the cells into each patient block all the way down the spreadsheet, then re-hide the entire section when finished pasting so that only the patient data columns are displayed (as it originally looked)
  - e. Go to the two new scale columns you created in step 2 under the “Measurements” heading, and highlight Row 3 through Row 18 (or however many rows you have for a single patient block), making sure to capture the purple cell as well
  - f. Copy and paste the cells into each patient block all the way down the spreadsheet
20. Re-protect the Patient Tracking worksheet



## Caseload Overview worksheet

21. Unhide the worksheet called “Caseload Overview – DO NOT EDIT” (you are going to edit it, so be very careful with these steps)
22. Choose the checkbox for “Select All” for the filters on the “Treatment Status” column and the “Last Available PHQ-9 Score” column
23. Insert 4 new columns after the GAD-7 columns, and name and format them to match the GAD-7 column headers
24. Copy the formulas from Row 3 in the GAD-7 columns, and paste them into Row 3 of the new scale columns
25. Edit the formulas that you just pasted so that they reflect the columns below from the Data Prep worksheet:
  - a. Initial *New Scale* Score (column created in step 12 of the Data Prep worksheet instructions)
  - b. Last Available *New Scale* Score (column created in step 15 of the Data Prep worksheet instructions)
  - c. *New Scale* % Dec (column created in step 16 of the Data Prep worksheet instructions)
  - d. Date of Last Available *New Scale* Score (**second** column created in step 17 of the Data Prep worksheet instructions)
26. Copy the formulas down the table columns
27. Revise the conditional formatting to match your target scores (see the section for Target Scores under “Conditional Formatting: Warnings, Ticklers, Flags, and Target Scores”)
28. Switch to the regular “Caseload Overview” worksheet, and insert 4 columns in the same place you had on the “Caseload Overview – DO NOT EDIT” worksheet
29. Copy and paste the new column headers you created on the “Caseload Overview – DO NOT EDIT” worksheet onto the “Caseload Overview” worksheet
30. Revise the Macro, being very careful not to change anything other than the below:
  - a. Press “Alt+F8” to open the Macro dialog box, and select “Edit” while “CopyPartOfFilteredRange” is highlighted
  - b. Under the green text for “UnHide all columns” change the range from “A:S” to “**A:W**” (or the last column with data on “Caseload Overview”)
  - c. Under the green text for “clear existing data in outdated CO table, except for first row” change the range from “A6:S” to “**A6:W**” (or the last column with data on “Caseload Overview”)
  - d. Under the green text for “set the range to apply filters to on CO - DO NOT EDIT worksheet (all columns)” change the range from “A4:R” to “**A4:V**” (or the last column with data on “Caseload Overview – DO NOT EDIT”)
  - e. Under the green text for “define the CO – DO NOT EDIT range we want to copy...” change the range from “A5:R” to “**A5:V**” (or the last column with data on “Caseload Overview – DO NOT EDIT”)
  - f. Under the green text for “define the table range w/ header...” change the range from “A4:S” to “**A4:W**” and change the next line from “A5:S” to “**A5:W**” (or the last column with data on “Caseload Overview”)
  - g. Looking at the **Caseload Overview – DO NOT EDIT** worksheet, compare the following column placements to the columns on your worksheet to determine if additional Macro changes are needed:
    - i. Is “Last Available PHQ-9 Score” in **Column J**? If not, find the green text for “this step narrows down the data.” Three lines down from that, change the text that reads



- AutoFilter Field:=10** to reflect the actual column number for “Last Available PHQ-9 Score” (Column A is the equivalent of Field 1, Column J is the equivalent of Field 10, etc.)
- ii. Is “Date of Last PHQ-9 Score” in **Column L**? If not, find the green text for “change Column L (date of last PHQ-9) to date format” and change any instance of “L” to the actual column for “Date of Last PHQ-9 Score”
  - h. Looking at the **Caseload Overview** worksheet, compare the following column placements to the columns on your worksheet to determine if additional Macro changes are needed:
    - i. Is “MRN” in **Column D**? If not, find the green text for “Hide MRN column from view in CO table” and change the instances of “D” to the actual column for “MRN”
    - ii. Is “Date Next Follow-up Due” in **Column G**? If not, find the green text for “Reset filters and apply new filters to remove Inactive tx status” and replace the letter “G” in **tgt.Range("G4")** with the actual column for “Date Next Follow-up Due”
31. Make sure there are **at least two “Active” patients** entered on the Patient Tracking worksheet (and enter fake data if not)
  32. Press “Ctrl+J” to refresh everything, make sure it reflects correct information from the “Patient Tracking” worksheet, and then re-hide the “Caseload Overview – DO NOT EDIT” worksheet
  33. Make a copy of this worksheet/tab, and save it as “Caseload Overview – BACKUP 2,” then hide this tab from view.



## Conditional Formatting on Patient Tracking Worksheet: Warnings, Ticklers, Flags, and Target Scores

In general, all conditional formatting on the Patient Tracking worksheet is most easily modified by using the Find & Select function. This will allow you to modify all cells that use the same data validation, which often corresponds to conditional formatting rules (e.g., for target scores). To highlight all cells of the same data validation, first click on one of the cells you will be changing. Go to the Home toolbar > Find & Select > Go To Special > click Data Validation > click Same > click OK. Once all cells are highlighted, you may modify the conditional formatting for those specific cells. This is particularly useful for target scores, when you may not want the initial/last available score in the purple row to change color.

### Warnings

1. **Action:** Turn Treatment Status red if it is left blank. Treatment Status is critical for formulas in the Caseload Overview.

**Format:**

- Fill: More Colors > Red=192; Green=0; Blue=0
- Font: Regular & Black

**Formula:** =AND(C3="",J4<>"")

**Applies to:** =\$C\$3:\$C\$3202

The screenshot shows the 'Conditional Formatting' dialog box. Under 'Select a Rule Type', the option 'Use a formula to determine which cells to format' is selected. The 'Edit the Rule Description' section shows the formula '=AND(C3="",J4<>"")' in the input field. Below the formula, a preview box shows the text 'AaBbCcYyZz' in a red background. A 'Format...' button is visible to the right of the preview box.

2. **Action:** Turn MRN red if it is left blank. MRN is critical for formulas in the Caseload Overview.

**Format:**

- Fill: More Colors > Red=192; Green=0; Blue=0
- Font: Regular & Black

**Formula:** =AND(A3="", J4<>"")

**Applies to:** =\$A\$3:\$A\$3202

The screenshot shows the 'Conditional Formatting' dialog box. Under 'Select a Rule Type', the option 'Use a formula to determine which cells to format' is selected. The 'Edit the Rule Description' section shows the formula '=AND(A3="",J4<>"")' in the input field. Below the formula, a preview box shows the text 'AaBbCcYyZz' in a red background. A 'Format...' button is visible to the right of the preview box.



3. **Action:** Turn Episode Number red if it is left blank. Episode Number is critical for many formulas in the Caseload Overview.

**Format:**

- Fill: More Colors > Red=192; Green=0; Blue=0
- Font: Regular & Black

**Formula:** =AND(J3<>"",F3="")

**Applies to:** =\$F\$3:\$F\$3202

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format

Edit the Rule Description:

**Format values where this formula is true:**

=AND(J3<>"",F3="")

**Preview:** AaBbCcYyZz

4. **Action:** Turn GAD-7 and PHQ-9 scores red if they are left blank. Blanks will register as a score of 0.

**Format:**

- Fill: More Colors > Red=192; Green=0; Blue=0
- Font: Regular & Black

**Formula:** =""

**Applies to:**

= \$M\$3:\$M\$1602,\$O\$3:\$O\$3202

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format

Edit the Rule Description:

**Format only cells with:**

Cell Value equal to =""

**Preview:** AaBbCcYyZz



## Ticklers

### 1. **Action:** Format “Past Due” tickler

**Format:**

- Fill: More Colors > Red=192;  
Green=0; Blue=0
- Font: Bold & White

**Formula:** ="past due"

**Applies to:** =\$E\$3:\$E\$3202

The screenshot shows the 'Format only cells that contain' rule configuration. The 'Format only cells with:' section is set to 'Specific Text' containing the text '"past due"'. The preview shows the text 'AaBbCcYyZz' in a red cell.

### 2. **Action:** Format “Contact due in...” tickler

**Format:**

- Fill: More Colors > Red=146;  
Green=208; Blue=80
- Font: Bold & Black

**Formula:** ="contact due"

**Applies to:** =\$E\$3:\$E\$3202

The screenshot shows the 'Format only cells that contain' rule configuration. The 'Format only cells with:' section is set to 'Specific Text' containing the text '"contact due"'. The preview shows the text 'AaBbCcYyZz' in a green cell.



## Flags

1. **Action:** "Flag for discussion" turns yellow.

**Format:**

- Fill: More Colors > Red=255; Green=255; Blue=109
- Font: Regular & Black

**Formula:** ="Flag for discussion"

**Applies to:** =\$R\$3:\$R\$3202

The screenshot shows the 'Conditional Formatting' dialog box. Under 'Select a Rule Type', 'Format only cells that contain' is selected. The 'Format only cells with:' section shows 'Cell Value' selected, 'equal to' chosen, and the formula '= "Flag for discussion"' entered. The 'Preview' section shows the text 'AaBbCcYyZz' in a yellow cell, with an 'Format...' button next to it.

2. **Action:** "Flag for discussion & safety risk" turns orange.

**Format:**

- Fill: More Colors > Red=255; Green=192; Blue=0
- Font: Regular & Black

**Formula:** ="Flag for discussion & safety risk"

**Applies to:** =\$R\$3:\$R\$3202

The screenshot shows the 'Conditional Formatting' dialog box. Under 'Select a Rule Type', 'Format only cells that contain' is selected. The 'Format only cells with:' section shows 'Cell Value' selected, 'equal to' chosen, and the formula '= "Flag for discussion & safety risk"' entered. The 'Preview' section shows the text 'AaBbCcYyZz' in an orange cell, with an 'Format...' button next to it.

3. **Action:** "Flag as safety risk" turns light red.

**Format:**

- Fill: More Colors > Red=255; Green=136; Blue=133
- Font: Regular & Black

**Formula:** ="Flag as safety risk"

**Applies to:** =\$R\$3:\$R\$3202

The screenshot shows the 'Conditional Formatting' dialog box. Under 'Select a Rule Type', 'Format only cells that contain' is selected. The 'Format only cells with:' section shows 'Cell Value' selected, 'equal to' chosen, and the formula '= "Flag as safety risk"' entered. The 'Preview' section shows the text 'AaBbCcYyZz' in a light red cell, with an 'Format...' button next to it.



## Target Scores

1. **Action:** When a PHQ-9 or GAD-7 score is at target for percent decrease (-50% or more), it will turn green.

**Format:**

- Fill: More Colors > Red=146;  
Green=208; Blue=80
- Font: Bold & Black

**Formula:** =(0.5-1)

**Applies to:**

=N\$3:N\$3202,\$P\$3:\$P\$3202

The screenshot shows the 'Conditional Formatting' dialog box with the following settings:

- Select a Rule Type:**
  - Format all cells based on their values
  - Format only cells that contain** (highlighted)
  - Format only top or bottom ranked values
  - Format only values that are above or below average
  - Format only unique or duplicate values
  - Use a formula to determine which cells to format
- Edit the Rule Description:**
  - Format only cells with:**
  - Cell Value (dropdown) | less than or equal to (dropdown) | =(0.5-1)
- Preview:** A green box containing the text 'AaBbCcYyZz' and a 'Format...' button.

2. **Action:** When a PHQ-9 score is at target (<5), it will turn green.

**Format:**

- Fill: More Colors > Red=146;  
Green=208; Blue=80
- Font: Bold & Black

**Formula:** =5

**Applies to:** =\$M\$4:\$M\$18,\$M\$36:\$M\$50,  
\$M\$20:\$M\$34 ... \$M\$1428:\$M\$1442 ...  
(every patient block excluding the initial  
assessment row)

The screenshot shows the 'Conditional Formatting' dialog box with the following settings:

- Select a Rule Type:**
  - Format all cells based on their values
  - Format only cells that contain** (highlighted)
  - Format only top or bottom ranked values
  - Format only values that are above or below average
  - Format only unique or duplicate values
  - Use a formula to determine which cells to format
- Edit the Rule Description:**
  - Format only cells with:**
  - Cell Value (dropdown) | less than (dropdown) | =5
- Preview:** A green box containing the text 'AaBbCcYyZz' and a 'Format...' button.





- Action:** When a GAD-7 score is at target (<10), it will turn green.

**Format:**

- Fill: More Colors > Red=146; Green=208; Blue=80
- Font: Bold & Black

**Formula:** =10

**Applies to:**

= $\$O\$4:\$O\$18,\$O\$36:\$O\$50,\$O\$20:\$O\$34$   
 ...  $\$O\$1428:\$O\$1442$  ... (every patient block excluding the initial assessment row)

## Conditional Formatting on Caseload Overview: Warnings and Target Scores

### Warnings

- Action:** Place yellow exclamation point next to contact dates and measurement dates more than 30 days old

**Format all cells based on their values:** See screenshot below

**Applies to:** = $\$M\$5:\$M\$1655,\$Q\$5:\$Q\$1655,\$F\$5:\$F\$1655$



2. **Action:** Place red flag next to follow-up contact dates that are past due

**Format all cells based on their values:** See screenshot below

**Applies to:** =\$G\$5:\$G\$1655

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format



Edit the Rule Description:

**Format all cells based on their values:**

Format Style: Icon Sets

Icon Style: Custom  Show Icon Only

Display each icon according to these rules:

Icon		Value	Type
No Cell Icon	when value is	>= TODAY()	Formula
	when < Formula and	>= 0	Formula
	when < Formula		



## Target Scores

1. **Action:** Place green checkmark next to GAD-7 scores <10

**Format all cells based on their values:** See screenshot below (the “no icon” value of 21 is ambiguous; it doesn’t matter what value is filled in here)

**Applies to:** =\$O\$5:\$O\$1655

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format

Edit the Rule Description:

**Format all cells based on their values:**

Format Style: Icon Sets

Icon Style: Custom  Show Icon Only

Display each icon according to these rules:

Icon		Value	Type
No Cell Icon	when value is	> 21	Number
No Cell Icon	when <= 21 and	>= 10	Number
	when < 10		



2. **Action:** Place green checkmark next to PHQ-9 scores <5

**Format all cells based on their values:** See screenshot below (See screenshot below (the “no icon” value of 11 is ambiguous; it doesn’t matter what value is filled in here)

**Applies to:** =\$K\$5:\$K\$1655

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format

Edit the Rule Description:

**Format all cells based on their values:**

Format Style: Icon Sets

Icon Style: Custom  Show Icon Only

Display each icon according to these rules:

Icon		Value	Type
No Cell Icon	when value is	$\geq$ 11	Number
No Cell Icon	when < 11 and	$>$ 4	Number
	when $\leq$ 4		



3. **Action:** Place green checkmark next to PHQ-9 or GAD-7 scores with  $\geq 50\%$  decrease from initial score

**Format all cells based on their values:** See screenshot below

**Applies to:** =\$L\$5:\$L\$1655,\$P\$5:\$P\$1655

Select a Rule Type:

- ▶ Format all cells based on their values
- ▶ Format only cells that contain
- ▶ Format only top or bottom ranked values
- ▶ Format only values that are above or below average
- ▶ Format only unique or duplicate values
- ▶ Use a formula to determine which cells to format

Edit the Rule Description:

**Format all cells based on their values:**

Format Style: Icon Sets

Icon Style: Custom  Show Icon Only

Display each icon according to these rules:

Icon		Value	Type
No Cell Icon	when value is	$\geq$ 0	Number
No Cell Icon	when < 0 and	$>$ =(0.5-1)	Formula
	when $\leq$ Formula		

