

Quick Start Guide for Patient Tracking Spreadsheet Template (Version 1)

Important User Information

- Make sure to click “Enable Editing” and “Enable Content” when first opening the spreadsheet.
- READ the Disclaimer and agree to the terms of use when first opening the spreadsheet.
- The instructions are based on Excel® 2010 and may not always apply to other versions of Excel®. The Patient Tracking Spreadsheet is not intended for use with Numbers®.
- The document consists of three worksheets called “Disclaimer,” “Patient Tracking,” and “Caseload Overview.” Users can switch between the worksheets using the tabs in the bottom-right corner.
 - The Disclaimer worksheet provides general information that your organization needs to know regarding liability.
 - The Patient Tracking worksheet is used for entering information from a patient contact. Data is only ever entered in the white cells on the Patient Tracking worksheet.
 - The Caseload Overview worksheet provides a sortable summary view of patient data. Never enter data directly into the Caseload Overview worksheet.
- If cells turn red on the *patient tracking* worksheet, this is an indicator that required data is missing from these cells.
- The red text at the top of the *caseload overview* worksheet is very important. Please follow these rules each time you use this worksheet.
- Never *cut* and paste data within the spreadsheet; only use *copy* and paste functions if needed.
- Regularly save secure, password-protected, HIPAA-compliant backups of the template in case you need to restore the template to a previous version.
- Each care manager should use his or her own separate copy of the template.
- A designated Spreadsheet Specialist is required to make any structural changes to the spreadsheet. Spreadsheet Specialist Instructions are available upon request.

Facilitating Psychiatric Case Review

Flags

To flag a patient for discussion with the psychiatric consultant, as a safety risk, or both, click on Column Q in the first row of the patient’s record in the *patient tracking* worksheet. Then, click again for a drop-down list and choose the appropriate flag.

- Sort Column R in the *caseload overview* worksheet to find patients who have been flagged for review.

Psychiatric Case Review Dates

When a patient’s care is discussed during a psychiatric case review, enter the date of the review in the first blank cell of Column R of the *patient tracking* worksheet. The first row of the patient record will automatically display the most recent date of review.

- Sort Column S in the *caseload overview* worksheet to find patients who have not been reviewed recently (by sorting oldest to newest), or sort in the reverse direction (newest to oldest) to find any patients with blanks who have not yet been discussed.

Supporting Patient Care

Use the Patient Tracking worksheet for the functions below.

Add New Patients

Enter the patient's MRN (must be at least three digits) in the first white cell in column A. Then, enter the patient's name in Column B.

- The rows underneath each entry will auto-populate to create a new record.

Treatment Status and Actions Due

Track treatment status ("Active," "Relapse Prevention," or "Inactive"), most recent visit, upcoming or past due follow-up contacts, and care episode numbers in Columns C through F.

- See the full Instructions for Care Managers for details on adding new episodes of care.
- Use the filter arrows to hide but retain information on inactive patients (Column C) or past episodes (Column D).
- Automatic color-coding shows items needing attention, such as missing information or overdue follow-up contacts.

Contact Dates

Choose desired follow-up intervals in Column H in the first row of the patient's record to generate follow-up due dates. Track actual contact dates and type of contact in Columns J and K.

Measurements

Enter PHQ-9 and GAD-7 scores each time they are obtained. Score changes are automatically calculated in Columns M and O. Scores that are at target and decreases of greater than 50% are highlighted to help identify patients ready for relapse prevention planning.

- Initial scores for the current episode of care automatically populate to the first row.

Caseload Management

Use the Caseload Overview worksheet for the functions below.

Customize Caseload View

Click on the filter arrow in any column header to sort or filter patients by treatment status, last contact date, next follow-up due date, weeks in treatment, screening scores, flags, et cetera.

View Individual Records

Click on the hyperlink in Column A to open the individual patient record in the Patient Tracking worksheet.

Visual Alerts

The *caseload overview* worksheet includes visual cues to help identify actions needed:

- **Yellow exclamation point** (⚠) if more than 30 days have passed since last patient contact or if screening scores are more than 30 days old.
- **Green check mark** (✓) if scores are at target.
- **Red flag** (🚩) if next follow-up contact is past due.

