Patient Tracking Spreadsheet Template
Quick Start Guide

AIMS CENTER
UNIVERSITY of WASHINGTON
Psychiatry & Behavioral Sciences

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 (unless the red cells are in the "Attention" row).
- 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.
- If additional contact rows are needed, there are 10 hidden rows at the bottom of each patient block that can be unhidden and used.
- 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.
- Direct all questions and feedback to aims_spreadsheet_registry@uw.edu.

Supporting Patient Care

Use the Patient Tracking worksheet for the functions below.

Add New Patients to the Caseload

Required fields for every new patient entered in the spreadsheet are case number (Column A), treatment status/date active (Column C), and DOB (Column E). If any required fields are not populated, they will turn red when the first provider contact is entered.

Record Contact Dates and Track Scheduled Appointments

Starting in Column F, **each white row** represents a single contact with the patient. For each contact, select the type of contact/visit from the dropdown menu in Column F (PCP, care manager, or psychiatrist), and then enter the contact date in the appropriate column for that provider (the other provider columns will be greyed out). If a new appointment is scheduled, you can select "Scheduled Appt." from the dropdown and enter dates in all applicable columns.

The first three rows in the Contacts & Visits section of each patient block (labeled "Attention," "Next Appt.," and "Most Recent Contact") provide the following information:

- **Attention (first row):** This row displays color-coded ticklers/cues in the applicable provider column in the following scenarios:
  - If the provider has a "Next Appt." date (second row) that is ≤1 week away, a **green** cell will cue "Upcoming Appt."
  - If the "Next Appt." date (second row) has passed, and a more recent contact has not been recorded for the provider, a **red** cell will cue "Appt. Past Due."
  - If the "Most Recent Contact" date (third row) is >1 year old for the PCP or >6 months old for the psychiatrist, and there is not a future appointment scheduled for the specific provider, an **orange** cell will cue "Due for Follow-up."
- **Next Appt. (second row):** This row displays the last scheduled appointment for each provider, pulling data from the white contact rows below that have been labeled "Scheduled Appt." in Column F. If desired, the "Scheduled Appt." rows can be overwritten with the actual contact when it occurs, and this will remove/reset the date that appears in the "Next Appt." row at the top of the patient block.
- **Most Recent Contact (third row):** This row displays the most recent contact date for each provider, pulling data from the white contact rows below.

Record and Monitor Measurements

After every contact date entered in the Contacts & Visits section, enter BMI, HbA1c, and blood pressure measurements in the subsequent Measurements section if they are obtained at that visit. A date must always be entered for measurements (in Column J), since some measurements may be done by an outside provider and obtained during an initial visit, for example.

The first three rows in the Measurements section of each patient block (labeled "Attention," "Previous Measurement," and "Most Recent Measurement") provide the following information:

- **Attention (first row):** This row displays color-coded ticklers/cues in the applicable measurement column in the following scenarios:
  - If the "Most Recent Measurement" (third row) falls within the **red** measurement ranges outlined in the Caseload Management section below, a **red** cell will cue "High" for that specific measurement.
  - If the "Most Recent Measurement" (third row) is >1 year old, an **orange** cell will cue "OLD [measurement name]." Similarly, if no measurement has been entered at all, an **orange** cell will cue "NO [measurement name]."
- **Previous Measurement (second row):** This row displays the *second-most recent value* obtained for each measurement in order to be able to quickly see if the patient improved, stayed the same, or got worse since their last measurement.
- **Most Recent Measurement (third row):** This row displays the most recent value obtained for each measurement, pulling data from the white rows below.

Create a Plan of Action

Following each contact with the patient, it may be necessary to identify action steps or appropriate interventions. Use the last section to enter action plan steps and track completion of them over time. A dropdown menu provides some preset options, but any text can be entered in the cells in this section or added to the preset options to make them more specific.

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 diagnosis, provider name, most recent PCP contact date, measurement values (sort by value or filter by color), etc.

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 color coding to help identify actions needed and measurements that require attention in the following columns:

- **Date of Most Recent PCP Contact:** Cells in this column will turn **orange** to indicate contact dates >1 year old or dates that are N/A (i.e., no PCP contact date recorded).
- **Most Recent BMI:** Cells in this column will turn **green** to indicate values between 18.5-24.9, **yellow** to indicate values between 25.0-29.9, and **red** to indicate values ≥30.
- **Most Recent HbA1c:** Cells in this column will turn **green** to indicate values <7.0, **yellow** to indicate values between 7.0-9.0, and **red** to indicate values >9.0.
- **Most Recent SBP/Most Recent DBP:** Cells in this column will turn **red** to indicate values ≥140/90 for patients <60 years old or values ≥150/90 for patients 60+ years old.
- **Dates of Most Recent BMI, HbA1c, and BP:** Cells in these three columns will turn **orange** to indicate measurement dates >1 year old or dates that are N/A (i.e., no measurement recorded).