Workflow spreadsheets set-up guide

This *Workflow spreadsheets set-up guide* forms part of the broader suite of tools within the *In-reach Rehabilitation Toolkit*. It serves as a step-by-step template resource for clinical services. This guide walks you through building structured MS Excel workbooks to track and monitor incoming referrals and patient movements. Example versions of the spreadsheet are included in the *In-reach Rehabilitation Toolkit*.

Workflow sheets are provided for data collection and are separated into two streams:

- Incoming referrals
- Current patients

Workbook - incoming referrals

The incoming referral spreadsheet is typically utilised by the in-reach medical team, CNC or senior allied health professionals (AHPs) to monitor the incoming referrals and the outcome of their assessment. Data collection is necessary to identify the throughput of patients through the In-reach service, as outlined in the *Evaluation framework resource*. To maintain usability, it is recommended to create and save spreadsheets on a monthly basis to prevent files from becoming overloaded with large volumes of patient data. Additionally, lines of patient data that are no longer current e.g. seen and declined or accepted/on the program, may be temporarily hidden during the month to maintain visibility of higher priority data sets including those currently awaiting assessment.

Workbook - current patients

The spreadsheet for current patients is typically utilised by the entire in-reach multidisciplinary team (MDT) to track current patient packages including key data sets. Similarly to the above incoming referrals spreadsheet, the current patients sheet it is recommended to create and save spreadsheets on a monthly basis to prevent files from becoming overloaded with large volumes of patient data. The current patients list should only include current active patients. Once discharged/completed, they can be moved to a below the current patients table or hidden and entered into the discharge patients sheet. This ensures that the coding for the name and URN remains consistent between sheets. In the discharged patient sheet, patients may be hidden temporarily once all datasets have been completed to maintain visibility of patients that have outstanding data requirements.

Following is a set-up guide for both worksheets.

1. Set up guide – Incoming referrals workbook – overview

The workbook for tracking incoming referrals requires four sheets: 1) received referrals, 2) monitor, 3) waitlist, and 4) lists (hidden). The Lists sheet stores drop-down options to standardise entries across the workbook.

Additional sheets can be added depending on what is required for your workflows. This set-up guide acts as a reference for relevant codes to optimise efficiency but is not prescriptive and can be adjusted as required. At a minimum, all services should collect data as per the minimum data requirements outlined in the *In-reach rehabilitation model of care* and *Evaluation framework resource*. Note that workflow management can be completed via alternative means such as SharePoint or Microsoft Lists, with consideration that this typically requires more complex coding and maintenance.

Example spreadsheets (if utilised) should be saved as a blank template and replicated for timeframes that support team data management e.g. monthly or quarterly to support reporting timeframes. You can consider additional modifications to this document including conditional formatting and colour coding to continue to improve the usability.

2. Referral sheets set-up

Open a new Excel workbook. Add new sheets named ‘Received Referrals’ ‘Monitor’, ‘Waitlist’, and ‘Lists’.

The incoming referrals will be monitoring via the main “Received Referrals’ tab. For patients that are currently on the monitor list and waitlist, they should be added to the additional sheets to maintain visibility for patients that are requiring active oversight following assessment.

2.1 Build the Lists sheet

In the Lists sheet, enter a table with the following standardised options:

Label each column with any relevant multiple-choice option for the sheets. At a minimum, you will likely require the following table set-up.

Referral Source	Sex	Status	Outcome	Priority
Neuro	Male	Referral Received	Accepted	Urgent
Stroke	Female	Awaiting Ax	Declined	High
General Medicine	Inter/NB	Ax Completed	Monitor	Medium
General Surgery			Awaiting Ax	Low
Other				

This sheet will then be the data that is available for any drop-down multiple-choice option in other sheets. Alternative or additional options can be easily added to this list to adjust the drop-down options. Once you are satisfied that the data is complete and the sheet is finalised, you can hide it to reduce clutter.

2.2 Received referrals sheet

Add headers: Date Received, Referral Source, Referrer Contact, URN, Patient First Name, Patient Surname, DOB, Age, Sex, HPC/Clinical Summar, Status, Outcome. Convert the range to a Table (Highlight, then Insert → Table, ensure relevant data is include and tickbox selected for Headers) to enable filtering.

Apply Data Validation for Referral Source, Sex, Status, and Outcome using the Lists sheet using the following steps:

Select relevant column (e.g.Referral source) → Data → Data Validation → Allow: List → Source: =Lists!$A$2:$A$6 OR manually highlight Referral Source column in Lists Sheet (with no header included). The source will change dependent on the list e.g. Sex =Lists!$B$2:$B$4.

To add Age formula in column H (starting H2):

```
=IF(G2="","",DATEDIF(G2,TODAY(),"Y"))
```

Highlight H2 and “drag” down the column to ensure this code applies to all rows below it. This means to fill down. This will ensure that as patient data is included, age will automatically be calculated based on DOB.

2.3 Monitor patient sheet

Add headers: URN, Patient Name, Date of Referral, Date of Assessment, Days on Monitor List, Reason for Monitor.

In Patient Name (cell B2), enter the XLOOKUP formula below and fill down:

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Received Referrals'!$D$2:$D$1000,'Received Referrals'!$E$2:$E$1000&" "&'Received Referrals'!$F$2:$F$1000,"")),""
```

In Referral Date column (cell C2), enter the XLOOKUP formula below and fill down:

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Received Referrals'!$D$2:$D$1000,'Received Referrals'!$A$2:$A$1000,"")),"")
```

These steps will ensure that whenever the URN is entered into the sheet, the full name and referral date will be automatically entered using the data from the Current Patient sheet.

Apply Data Validation: Priority for Assessment → =Lists!$E$2:$E$5; or manually highlight the list of Patient Priority Options in the Lists Sheet.

Users will then have to manually add the Date of Assessment and Reason for Monitor.

Reason for Monitor can be used as Free Text box or additional standardised options could be considered and added to the Lists Sheet and validated using the same method as other drop-down options.

For days on Monitor list. The following formula can be applied to automatically calculated based on time since the date of assessment: `=IF(D2="","",MAX(0,TODAY()-D2))`

2.4 Waitlist sheet

Add headers: URN, Patient Name, Referral Date, Assessment Date, Days on Waitlist, Priority for Package.

In patient name and referral date, the above XLOOKUP formulas can be used to ensure that the patient name is linked with the URN.

As above, Days on the waitlist can be automatically calculated by using the same formula:

```
=IF(D2="","",MAX(0,TODAY()-D2))
```

3. Set up guide - Patient movement workbook - overview

In the patient tracking spreadsheet, create 4 sheets: Current Patients, Outcome Measures, Discharged Patients, and Lists (hidden). The Lists sheet stores drop-down options to standardise entries across the workbook.

Additional sheets can be added depending on what is required for your workflows. This Set-up guide should act as a reference guide for relevant codes to optimise efficiency but is not prescriptive and can be adjusted as required. At a minimum, all services should collect data as per the minimum data requirements outlined in the In-reach Rehabilitation model of care and Evaluation Framework resource. Note that workflow management can be completed via alternative means such as SharePoint or Microsoft Lists, with consideration that this typically requires more complex coding and maintenance.

If utilised, the example spreadsheets should be saved as a blank template and replicated for timeframes that support team data management e.g. monthly or quarterly to support reporting timeframes. You can consider additional modifications to this document including conditional formatting and colour coding to continue to improve the usability.

4. Patient movement sheets set-up

Open a new Excel workbook. Rename the default sheet to ‘Current Patients’. Add new sheets named ‘Team Allocation’, ‘Outcome Measures’, ‘Discharged’, and ‘Lists’.

4.1 Build the Lists sheet

In the Lists sheet, enter a table with the following standardised options:

Label each column with any relevant multiple-choice option for the sheets. At a minimum, you will likely require the following table set-up.

Yes/No	Sex	Teams	Key Worker	Referring Team	D/C Destinations
Yes	Male	Blue	(Physio Name)	Neuro	Home
No	Female	Red	(OT Name)	Stroke	Sub-acute Rehab
	Inter/NB	Yellow	(SP Name)	General Medicine	Step-Down Bed
				General Surgery	RACF
				Other	Acute Ward

Note that the options included in this table should be relevant to your service e.g. Key Worker should be members of your team and referring team options should be included based on your typical or planned referrers. Similarly for discharge destinations, these will be specific to your typical or planned and can be adjusted at any time.

This sheet will then be the data that is available for any drop-down multiple-choice option in other sheets. Once you are satisfied that the data is complete and the sheet is finalised, you can hide it to reduce clutter.

4.2 Current patient sheet

Add headers: First Name, Surname, UN, DOB, Age, Sex, HPC, Impairment Code, Team and Key Worker. Additional headers/columns should be included for all disciplines within the workforce (e.g. Physiotherapy, occupational therapy, CNC, speech pathology etc.). Convert the range to a Table (Highlight, then Insert → Table, ensure relevant data is include and tickbox selected for Headers) to enable filtering.

Set Sex as a drop-down: Select column F → Data → Data Validation → Allow: List → Source: `=Lists!$B$2:$B$4` OR manually highlight Yes/No column in Lists Sheet (no header included).

Add Age formula in column E (starting E2):

```
=IF(D2="","",DATEDIF(D2,TODAY(),"Y"))
```

Highlight D2 and “drag” down the column to ensure this code applies to all rows below it. This means to fill down.

This will ensure that as patient data is included, age will automatically be calculated based on DOB. Sex can also be selected from drop down options.

Under the Team Allocation header, the following data validation should be included: Apply Data Validation: Team Allocation → `=Lists!$C$2:$C$9`; or manually highlight the list of teams in the Lists Sheet. The teams are labelled as colours in the example but can be labelled in any way suitable for the individual service.

Under the Key Worker column, the following data validation should be applied → `=Lists!$D$2:$D$6`

Under each of the discipline columns, the following validation should be included for yes/no selection of which disciplines are involved or have been referred for each patient.

Yes/No columns → `=Lists!$A$2:$A$3` or manually highlight the yes/no columns in the Lists Sheet.

4.3 Outcome measure sheet

Add headers: URN, Full Name, Referring Team, Estimated Discharge Date, Estimated Discharge Destination, FIM - Admission Total, FIM - Discharge Total, Goals. Additional headers can be added for any additional patient outcomes used within this team

Apply data validation: Referring Team → `=Lists!$E$2:$E$6;`

Destination → `=Lists!$F$2:$F$6;`

For additional outcome measures, drop down options can be applied using the same lists and data validation steps as above. To maintain accountability for additional tasks (e.g. completion of patient survey or provision of resources) yes/no can be included as well following the same steps.

Use the same Full Name XLOOKUP in column B:

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Current Patients'!$C$2:$C$200,'Current Patients'!$A$2:$A$200&" "&'Current Patients'!$B$2:$B$200,"")),"")
```

As above, this step ensures that the patient's name is included in the table when the URN is entered.

4.4 Discharged patient sheet

This sheet will be used once patients have been discharged from the service to monitor necessary actions. The following headers are examples of key discharge actions, but additional items can be included depending on typical workflow for your service.

Add headers: URN, Patient Name, Discharge Date, Survey Completed, AROC Data Completed, Discharge Summary Completed.

Use the same Full Name XLOOKUP in column B:

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Current Patients'!$C$2:$C$200,'Current Patients'!$A$2:$A$200&" "&'Current Patients'!$B$2:$B$200,"")),"")
```

Apply Yes/No validation to columns D–G using `=Lists!$A$2:$A$3.` Format as a table for filtering.

Optional conditional formatting could be applied with colour coding for yes/no items to improve awareness of tasks that require actioning.

5. Hide the Lists sheet

In each workbook, the lists sheet can be hidden to improve clarity and usability. Right-click the Lists tab and choose 'Hide'. You can unhide later to edit options or list content.

6. Test the setup

In each workbook, the set-up can be tested by using an example or test patient using the following steps for each workbook:

Referrals:

- Add a patient in Received Referrals.
- Enter the same URN on Awaiting Assessment, Declined, Monitor and Waitlist to ensure data correlating across sheets.
- Confirm Full Name and Referral Date appears automatically.
- Add date of assessment in Monitor and Waitlist sheets to ensure days calculation correct.
  - Troubleshooting: If a number appears that is not a date, change formatting in “Number” on home section of tool bar to Short Date.
- Check drop-downs work.

Patient movement:

- Add a patient on Current Patients.
- Enter the same URN in the Outcome Measures and Discharge Patients sheet.
- Confirm Full Name appears automatically.
- Check drop-downs work.

Appendix A: Referrals - formulas

Copy and paste the following as required.

Patient Name:

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Received Referrals'!$D$2:$D$1000,'Received
Referrals'!$E$2:$E$1000&" "&'Received Referrals'!$F$2:$F$1000,"")),"")
```

Referral Date:

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Received Referrals'!$D$2:$D$1000,'Received
Referrals'!$A$2:$A$1000,"")),"")
```

Days on Monitor/Waitlist:

```
=IF(D2="","",MAX(0,TODAY()-D2))
```

Appendix B: Patient tracking - formulas

Copy and paste the following as required.

Full Name (Team Allocation!B2 and Outcome Measures!B2):

```
=IFERROR(IF(A2="","",XLOOKUP(A2,'Current Patients'!$C$2:$C$200,'Current
Patients'!$A$2:$A$200&" "&'Current Patients'!$B$2:$B$200,"")),"")
```

Age (Current Patients!E2):

```
=IF(D2="","",DATEDIF(D2,TODAY(),"Y"))
```

INDEX/MATCH alternative (for older Excel versions without XLOOKUP):

```
=IFERROR(IF(A2="","",INDEX('Current Patients'!$A$2:$A$200, MATCH(A2, 'Current
Patients'!$C$2:$C$200, 0)) & " " & INDEX('Current Patients'!$B$2:$B$200, MATCH(A2,
'Current Patients'!$C$2:$C$200, 0))),"")
```