



Acuity/Individual Service Plan (ISP) List for Agencies Providing Medical Case Management Services

Use these steps to run the custom report called “*Acuity/ISP List (MCM)*” in CAREWare. This report is intended to be used by MCM providers as a tool to see their progress in completing ISP’s and Acuity Assessments for each MCM (and Care Access) client.

Please also note that the same instructions can be utilized to run the custom reported called “*ISP/Acuity ARCH*” in CAREWare for your Arch and Care Access clients.

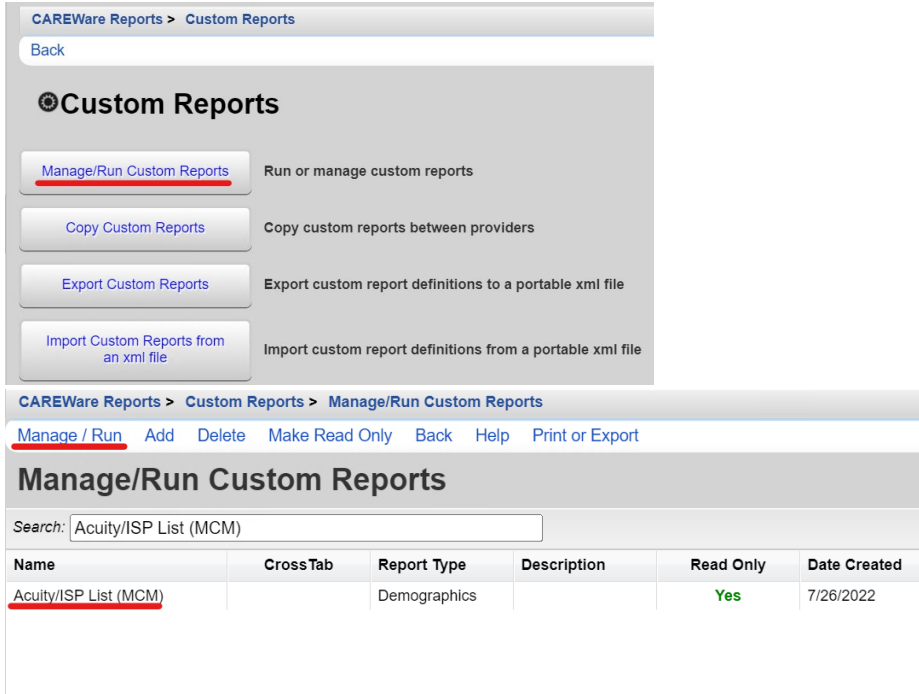
Note: this custom report is “Read Only” which means fields and filters cannot be edited. This report has a built-in filter that ensures the report only pulls **actively enrolled MCM clients** as of the date the report is run.

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Instructions

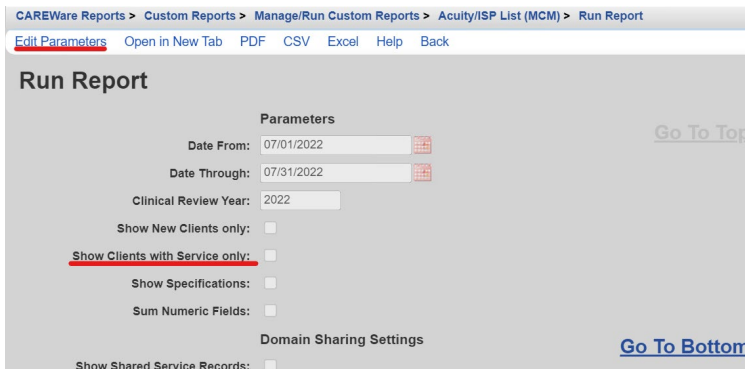
- 1) Once you have logged into CAREWare Select *Reports* → Select *Custom Reports* → Select *Manage/Run Custom Reports*. Type in the search bar '**Acuity/ISP List (MCM)**'. Select this report and click on *Manage/Run*



The screenshot shows the 'Custom Reports' management page in CAREWare. It features a sidebar with buttons for 'Manage/Run Custom Reports', 'Copy Custom Reports', 'Export Custom Reports', and 'Import Custom Reports from an xml file'. The main content area is titled 'Manage/Run Custom Reports' and includes a search bar with the text 'Acuity/ISP List (MCM)'. Below the search bar is a table with the following data:

Name	CrossTab	Report Type	Description	Read Only	Date Created
<u>Acuity/ISP List (MCM)</u>		Demographics		Yes	7/26/2022

- 2) Select *Run Report*, then *Edit Parameters* to adjust the dates. Start date and end date should be the date you are running the report. Click *Save*. (Make sure the checkbox "clients with services only" is NOT selected)

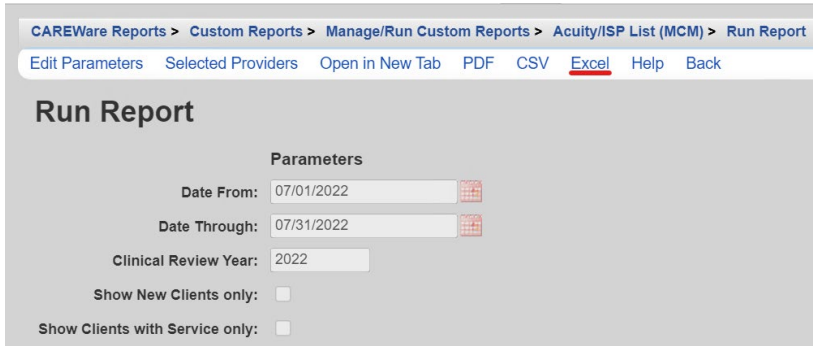


The screenshot shows the 'Run Report' configuration page for the 'Acuity/ISP List (MCM)' report. It includes a breadcrumb trail: 'CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Acuity/ISP List (MCM) > Run Report'. The page has several sections:

- Parameters:** Includes date pickers for 'Date From' (07/01/2022) and 'Date Through' (07/31/2022), and a text input for 'Clinical Review Year' (2022).
- Filters:** A list of checkboxes: 'Show New Clients only', 'Show Clients with Service only' (underlined), 'Show Specifications', and 'Sum Numeric Fields'.
- Domain Sharing Settings:** A checkbox for 'Show Shared Service Records'.

Navigation links 'Go To Top' and 'Go To Bottom' are also visible.

3) To run the report select Excel (or PDF if preferred)



a) Below you can see the information the report will provide.

Case Manager Name	Name	Date of most recent ISP	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment
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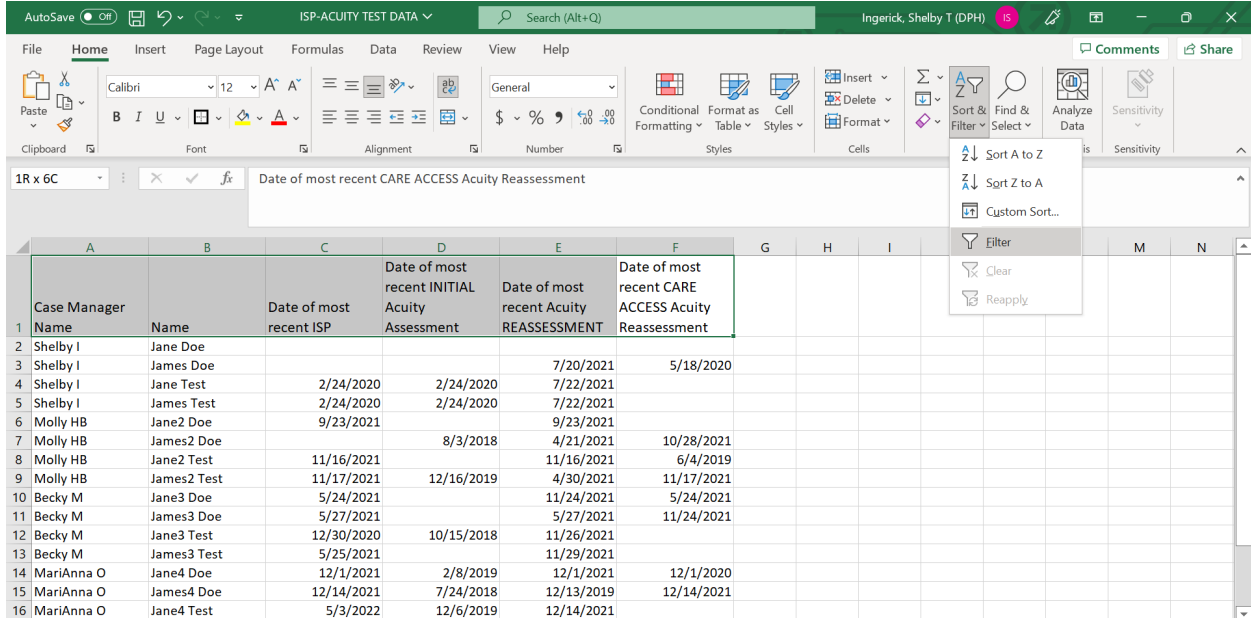
The report is automatically sorted by case manager so case managers can see their active MCM clients and each client's most recent ISP/Acuity dates.

To view the Excel report you have just created, the file must be saved and transferred over to your desktop via WinSCP
 (Need help transferring your files from CAREWare to your desktop? Email carewaremahelpdesk@jsi.com and ask for the CAREWare MA connect to SFTP document)

Continue on with the tip sheet if you would like to customize the report/spreadsheet further, by creating columns indicating ISP/Acuity due dates and highlighting those that are overdue

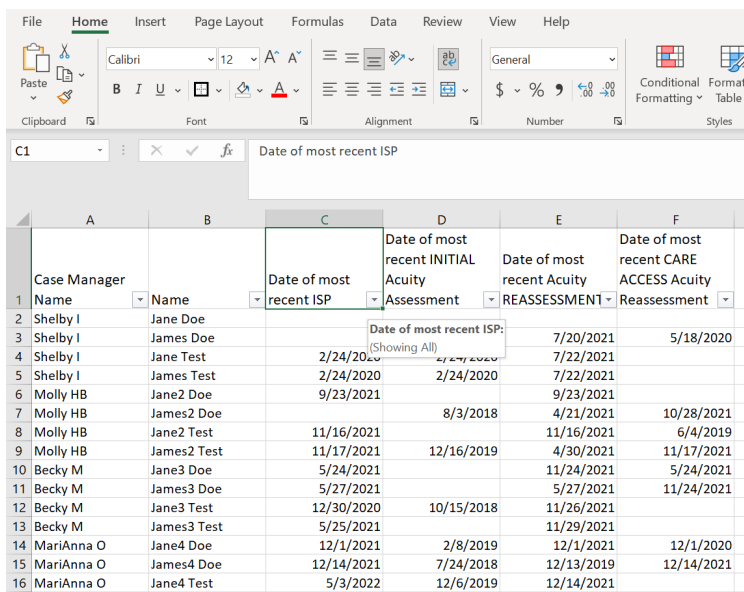
Identify clients who have not had an ISP in the past 6 months

- 1) Select all column headers and add a filter



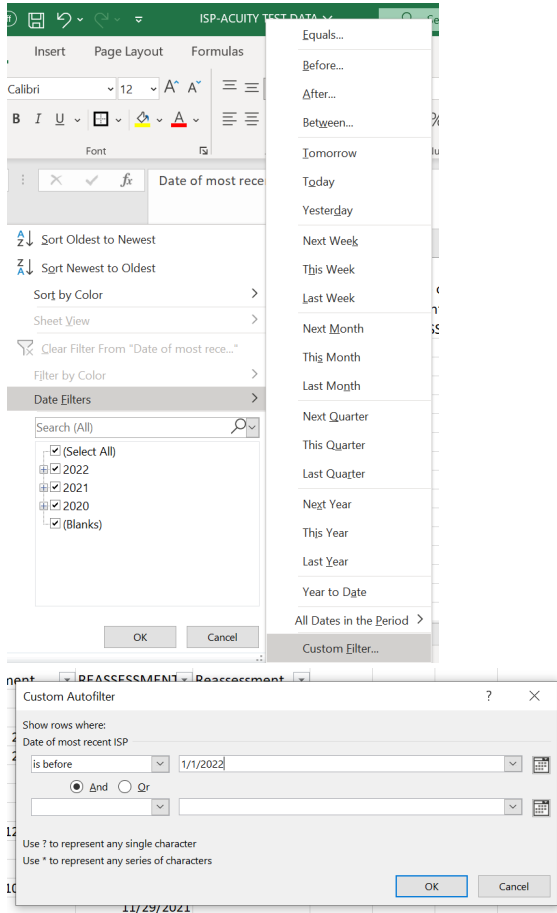
Case Manager Name	Name	Date of most recent ISP	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment
Shelby I	Jane Doe			7/20/2021	5/18/2020
Shelby I	James Doe			7/22/2021	
Shelby I	Jane Test	2/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	2/24/2020	7/22/2021	
Molly HB	Jane2 Doe	9/23/2021		9/23/2021	
Molly HB	James2 Doe		8/3/2018	4/21/2021	10/28/2021
Molly HB	Jane2 Test	11/16/2021		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	12/16/2019	4/30/2021	11/17/2021
Becky M	Jane3 Doe	5/24/2021		11/24/2021	5/24/2021
Becky M	James3 Doe	5/27/2021		5/27/2021	11/24/2021
Becky M	Jane3 Test	12/30/2020	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021		11/29/2021	
MariAnna O	Jane4 Doe	12/1/2021	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	7/24/2018	12/13/2019	12/14/2021
MariAnna O	Jane4 Test	5/3/2022	12/6/2019	12/14/2021	

- 2) Select the arrow in the bottom right corner of *Date of most recent ISP* cell and select “Date filters” then select “Custom filter”. A Custom Autofilter window pops up - select from the dropdown options “is before...” and type in the date 6 months prior to today’s date. (i.e., today is 7/1/22, I will type in 1/1/22).



Case Manager Name	Name	Date of most recent ISP	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment
Shelby I	Jane Doe			7/20/2021	5/18/2020
Shelby I	James Doe			7/22/2021	
Shelby I	Jane Test	2/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	2/24/2020	7/22/2021	
Molly HB	Jane2 Doe	9/23/2021		9/23/2021	
Molly HB	James2 Doe		8/3/2018	4/21/2021	10/28/2021
Molly HB	Jane2 Test	11/16/2021		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	12/16/2019	4/30/2021	11/17/2021
Becky M	Jane3 Doe	5/24/2021		11/24/2021	5/24/2021
Becky M	James3 Doe	5/27/2021		5/27/2021	11/24/2021
Becky M	Jane3 Test	12/30/2020	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021		11/29/2021	
MariAnna O	Jane4 Doe	12/1/2021	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	7/24/2018	12/13/2019	12/14/2021
MariAnna O	Jane4 Test	5/3/2022	12/6/2019	12/14/2021	

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Acuity/ISP List Custom Report
 December 2024



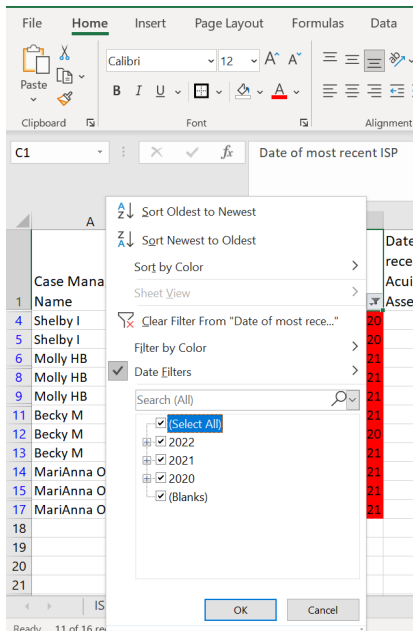
Click ok. You will now only see rows for clients with an ISP entered greater than 6 months ago. If desired, you can highlight these cells in a different color to signify those who are past due (in this example, the day is 7/1/2022 and those who are past due are highlighted red).

Case Manager Name	Name	Date of most recent ISP	Date received Acuity Assessment
4 Shelby I	Jane Test	2/24/2020	
5 Shelby I	James Test	2/24/2020	
6 Molly HB	Jane2 Doe	9/23/2021	
8 Molly HB	Jane2 Test	11/16/2021	
9 Molly HB	James2 Test	11/17/2021	
10 Becky M	Jane3 Doe	5/24/2021	
11 Becky M	James3 Doe	5/27/2021	
12 Becky M	Jane3 Test	12/30/2020	
13 Becky M	James3 Test	5/25/2021	
14 MariAnna O	Jane4 Doe	12/1/2021	
15 MariAnna O	James4 Doe	12/14/2021	
17 MariAnna O	James4 Test	12/15/2021	
18			
19			

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To return to see all clients again, click on the filter arrow, click on “Select All” and “OK”



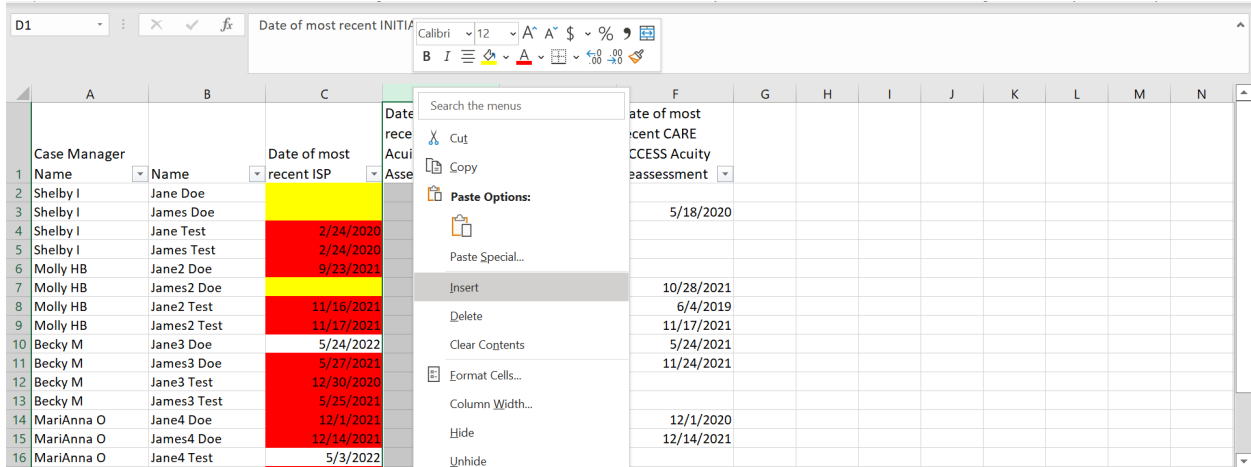
Note: If someone does not have a date of latest ISP this means they never had an ISP entered in CAREWare (see cells highlighted in yellow) and either need one or they may be a client that is no longer receiving services and their enrollment status needs to be changed to no longer active.

Case Manager	Name	Date of most recent ISP	recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	recent CARE ACCESS Acuity Reassessment
Shelby I	Jane Doe			7/20/2021	5/18/2020
Shelby I	James Doe		2/24/2020	7/22/2021	
Shelby I	Jane Test	2/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	2/24/2020	7/22/2021	
Molly HB	Jane2 Doe	9/23/2021		9/23/2021	
Molly HB	James2 Doe		8/3/2018	4/21/2021	10/28/2021
Molly HB	Jane2 Test	11/16/2021		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	12/16/2019	4/30/2021	11/17/2021
Becky M	Jane3 Doe	5/24/2022		11/24/2021	5/24/2021
Becky M	James3 Doe	5/27/2021		5/27/2021	11/24/2021
Becky M	Jane3 Test	12/30/2020	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021		11/29/2021	
MariAnna O	Jane4 Doe	12/1/2021	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	7/24/2018	12/13/2019	12/14/2021
MariAnna O	Jane4 Test	5/3/2022	12/6/2019	12/14/2021	
MariAnna O	James4 Test	12/15/2021	12/15/2020	12/15/2021	

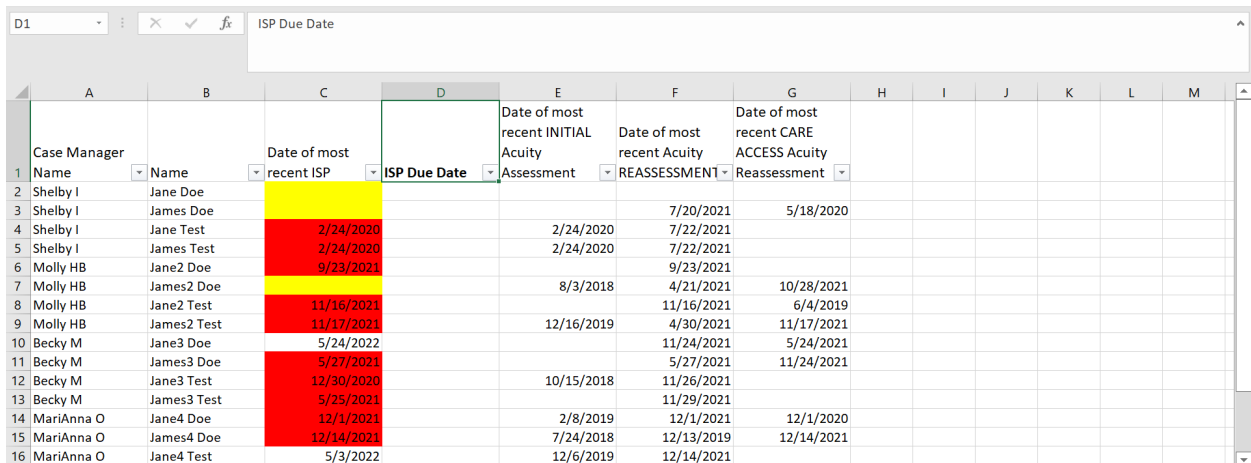
How to create a column that shows the ISP due date

- 1) Create a new column to the right of *Date of most recent ISP* column and name the new column header '**ISP due date**'

To do this, select all of column D by right clicking on the letter D, select Insert. A new column should appear to the left.



Type in the top row of the new column 'ISP due date'



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Click on the letter D (which is now the 'ISP Due Date' column) to select the entire column. Change the format of the cell types to be "Short Date".

The screenshot shows an Excel spreadsheet with the following data:

Case Manager	Name	Date of most recent ISP	ISP Due Date
Shelby I	Jane Doe		
Shelby I	James Doe		
Shelby I	Jane Test	2/24/2020	
Shelby I	James Test	2/24/2020	
Molly HB	Jane2 Doe	9/23/2021	
Molly HB	James2 Doe		
Molly HB	Jane2 Test	11/16/2021	
Molly HB	James2 Test	11/17/2021	
Becky M	Jane3 Doe	5/24/2022	
Becky M	James3 Doe	5/27/2021	
Becky M	Jane3 Test	12/30/2020	
Becky M	James3 Test	5/25/2021	
MariAnna O	Jane4 Doe	12/1/2021	
MariAnna O	James4 Doe	12/14/2021	
MariAnna O	Jane4 Test	5/3/2022	

The 'ISP Due Date' column (D) is selected, and the 'Short Date' format is applied to the cells.

- In the 2nd row of this new column, type in formula =EDATE (select or type "C2" as the start date, 6). Press enter. Drag this formula down to all cells (note: to drag down a formula, hover over the bottom right corner of cell D2 until you see the + symbol cursor, then double click). This formula creates a date 6 months from the most recent ISP service date.

The screenshot shows the Excel spreadsheet with the formula =EDATE(C2,6) entered in cell D2. The spreadsheet now includes an additional column for 'Date of most recent INITIAL Acuity Assessment' (E) and 'Date of most recent CARE ACCESS Acuity REASSESSMENT' (G).

Case Manager	Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent CARE ACCESS Acuity REASSESSMENT
Shelby I	Jane Doe		=EDATE(C2,6)		
Shelby I	James Doe				
Shelby I	Jane Test	2/24/2020		2/24/2020	7/22/2021
Shelby I	James Test	2/24/2020		2/24/2020	7/22/2021
Molly HB	Jane2 Doe	9/23/2021			9/23/2021
Molly HB	James2 Doe			8/3/2018	4/21/2021
Molly HB	Jane2 Test	11/16/2021			11/16/2021
Molly HB	James2 Test	11/17/2021		12/16/2019	4/30/2021
Becky M	Jane3 Doe	5/24/2022			11/24/2021
Becky M	James3 Doe	5/27/2021			5/27/2021
Becky M	Jane3 Test	12/30/2020		10/15/2018	11/26/2021
Becky M	James3 Test	5/25/2021			11/29/2021
MariAnna O	Jane4 Doe	12/1/2021		2/8/2019	12/1/2021
MariAnna O	James4 Doe	12/14/2021		7/24/2018	12/13/2019
MariAnna O	Jane4 Test	5/3/2022		12/6/2019	12/14/2021

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Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

D2 =EDATE(C2,6)

Case Manager	Name	Date of most recent ISP	ISP Due Date	Acuity Assessment	recent Acuity REASSESSMENT	ACCESS Acuity Reassessment
Shelby I	Jane Doe		6/30/1900			
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021
Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021	
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021
MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	

3) Click on the filter arrow in ISP Due Date and select 'Sort Oldest to Newest'

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

D2 =EDATE(C2,6)

Sort Oldest to Newest

Case Manager	Name	Date of most recent ISP	ISP Due Date	Acuity Assessment	recent Acuity REASSESSMENT	ACCESS Acuity Reassessment
Shelby I	Jane Doe		6/30/1900			
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021
Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021	
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021
MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	

ISP-Acuity Data

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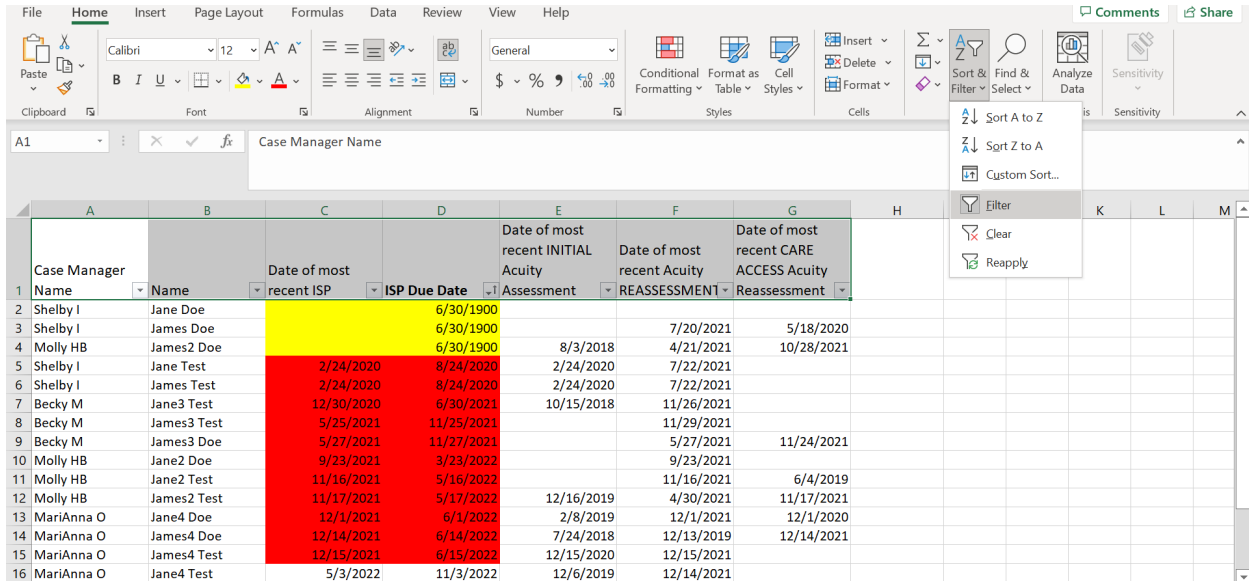
Case Manager	Name	Date of most recent ISP	ISP Due Date	Acuity Assessment	recent Acuity REASSESSMENT	ACCESS Acuity Reassessment
Shelby I	Jane Doe		6/30/1900			
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021	
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	
MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	
Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021

4) Option to highlight those whose due dates are past due (in this example, the day is 7/1/2022 and those who are past due are highlighted red). You can also look at whose ISP due dates are coming up. Note: *you can ignore the ISP Due Date for those who do not have an ISP entered yet* Those are highlighted yellow in the example below and are still in need of their initial ISP.

Case Manager	Name	Date of most recent ISP	ISP Due Date	Acuity Assessment	recent Acuity REASSESSMENT	ACCESS Acuity Reassessment
Shelby I	Jane Doe		6/30/1900			
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021	
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020
MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	
MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	
Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021

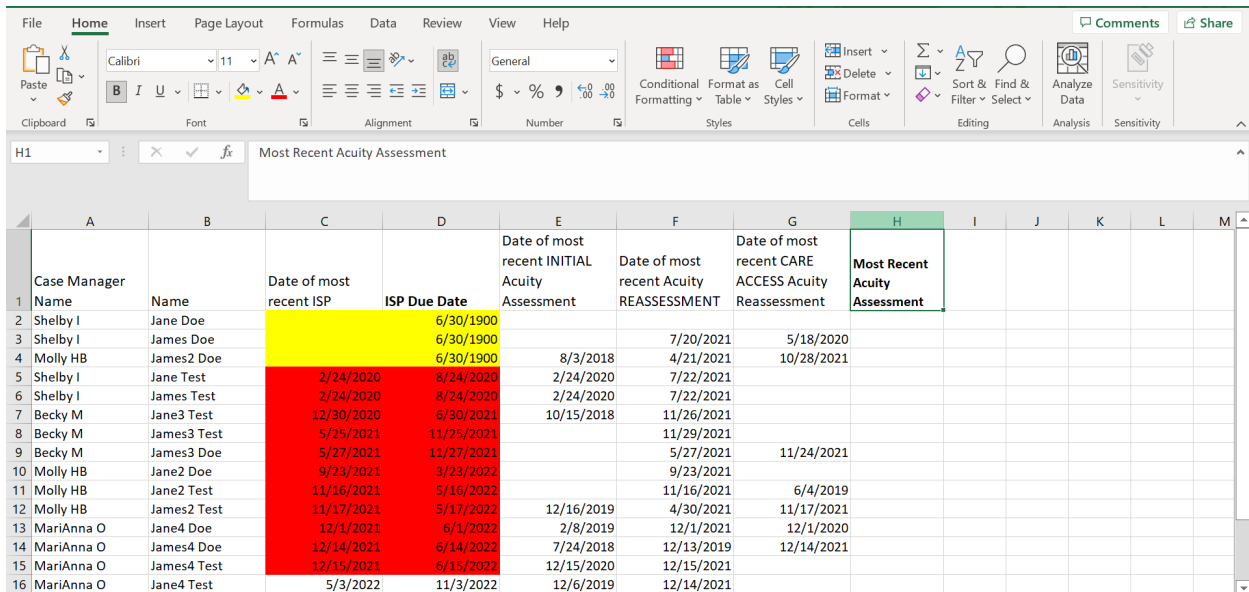
How to create a column that shows most recent Acuity assessment (Initial acuity assessment OR acuity reassessment OR care access reassessment)

1) Remove any previous filters



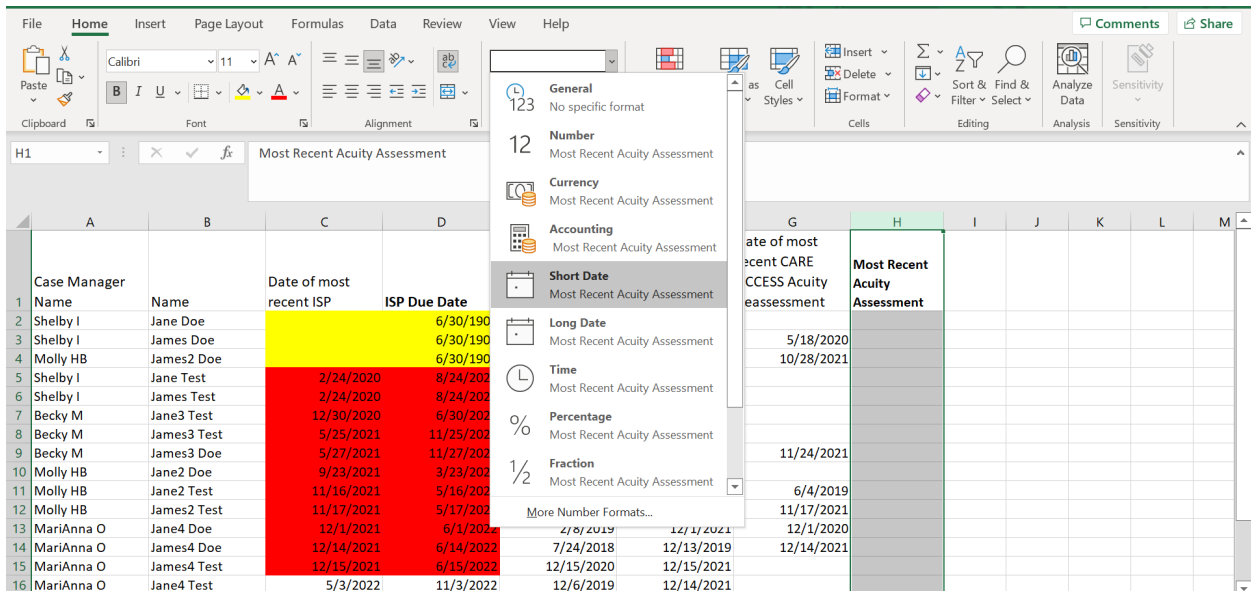
Case Manager Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment
Shelby I Jane Doe	6/30/1900				
Shelby I James Doe	6/30/1900			7/20/2021	5/18/2020
Molly HB James2 Doe	6/30/1900		8/3/2018	4/21/2021	10/28/2021
Shelby I Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Shelby I James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	
Becky M Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	
Becky M James3 Test	5/25/2021	11/25/2021		11/29/2021	
Becky M James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021
Molly HB Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	
Molly HB Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019
Molly HB James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021
MariaAnna O Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020
MariaAnna O James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021
MariaAnna O James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	
MariaAnna O Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	

2) In the column to the right of “Date of most recent Care Access Acuity Reassessment” (Column H) Type in “Most recent Acuity Assessment”.

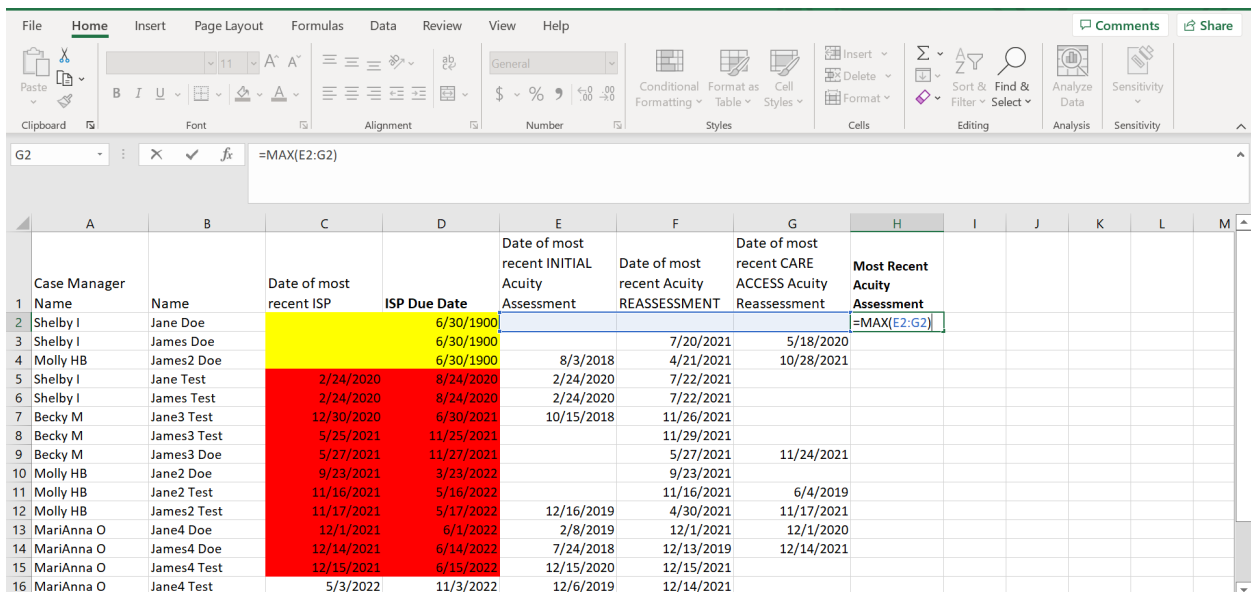


Case Manager Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment	Most Recent Acuity Assessment
Shelby I Jane Doe	6/30/1900					
Shelby I James Doe	6/30/1900			7/20/2021	5/18/2020	
Molly HB James2 Doe	6/30/1900		8/3/2018	4/21/2021	10/28/2021	
Shelby I Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		
Shelby I James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		
Becky M Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		
Becky M James3 Test	5/25/2021	11/25/2021		11/29/2021		
Becky M James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021	
Molly HB Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		
Molly HB Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	
Molly HB James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	
MariaAnna O Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	
MariaAnna O James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	
MariaAnna O James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		
MariaAnna O Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		

Click on the letter H of column H to select the entire column named *Most Recent Acuity Assessment*. Change the format of the cell types to be “Short Date”.



- In the 2nd row of column H, type in formula =MAX (select the 3 dates to the left). Drag this formula down to all cells (note: to drag down a formula, hover over the bottom right corner of cell H2 until you see the + symbol cursor, then double click)



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Case Manager	Name	Date of most recent ISP	ISP Due Date	Acuity Assessment	recent Acuity REASSESSMENT	ACCESS Acuity Reassessment	Acuity Assessment
1	Shelby I	Jane Doe	6/30/1900				1/0/1900
2	Shelby I	James Doe	6/30/1900		7/20/2021	5/18/2020	7/20/2021
3	Molly HB	James2 Doe	6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021
4	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	7/22/2021
5	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	7/22/2021
6	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	11/26/2021
7	Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021	11/29/2021
8	Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021
9	Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	9/23/2021
10	Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019
11	Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021
12	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020
13	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021
14	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	12/15/2021
15	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	12/14/2021
16	Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021
17							11/24/2021
18							

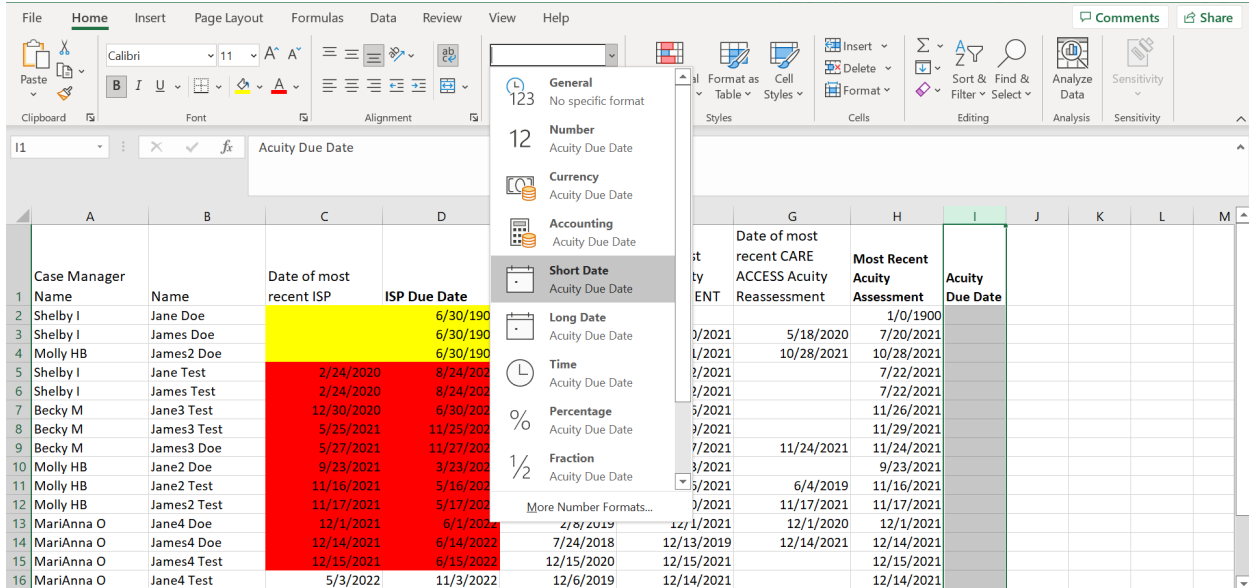
Column H now shows the most recent of any of the 3 acuity service dates.

How to create a column that shows the Acuity due date

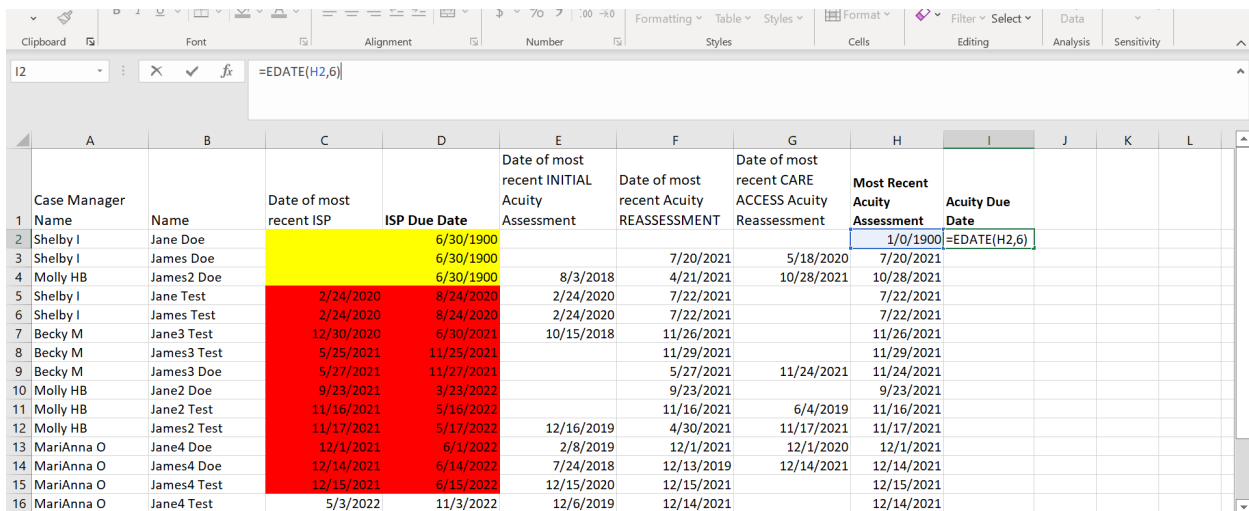
- 1) Create a new column to the right of 'most recent Acuity Assessment' and type in the column header as 'Acuity due date'.

Case Manager	Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment	Most Recent Acuity Assessment	Acuity Due Date
1	Shelby I	Jane Doe	6/30/1900				1/0/1900	
2	Shelby I	James Doe	6/30/1900		7/20/2021	5/18/2020	7/20/2021	
3	Molly HB	James2 Doe	6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021	
4	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	7/22/2021	
5	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	7/22/2021	
6	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	11/26/2021	
7	Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021	11/29/2021	
8	Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021	
9	Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	9/23/2021	
10	Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	
11	Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	
12	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	
13	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	
14	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	12/15/2021	
15	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	12/14/2021	
16								
17								
18								

Click on the letter I of column I to select the entire column named *Acuity Due Date*. Change the format of the cell types to be “Short Date”.



- In the 2nd row of this column, type in formula =EDATE(select or type “H2” as the start date, 6). Drag this formula down to all cells (note: to drag down a formula, hover over the bottom right corner of cell D2 until you see the + symbol cursor, then double click). This creates a date 6 months from the most recent Acuity service date.



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Case Manager Name	Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment	Most Recent Acuity Assessment	Acuity Due Date
Shelby I	Jane Doe		6/30/1900				1/0/1900	6/30/1900
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020	7/20/2021	1/20/2022
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021	4/28/2022
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021	5/26/2022
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021		11/29/2021	5/29/2022
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021	11/24/2021	5/24/2022
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		9/23/2021	3/23/2022
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	11/16/2021	5/16/2022
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	11/17/2021	5/17/2022
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	12/1/2021	6/1/2022
MariAnna O	Jane4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	12/14/2021	6/14/2022
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021	6/15/2022
MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		12/14/2021	6/14/2022
Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021	11/24/2021	5/24/2022

3) Select all column headers to add a filter

Case Manager Name	Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment	Most Recent Acuity Assessment	Acuity Due Date
Shelby I	Jane Doe		6/30/1900				1/0/1900	6/30/1900
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020	7/20/2021	1/20/2022
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021	4/28/2022
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021	5/26/2022
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021		11/29/2021	5/29/2022
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021	11/24/2021	5/24/2022
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		9/23/2021	3/23/2022
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	11/16/2021	5/16/2022
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	11/17/2021	5/17/2022
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	12/1/2021	6/1/2022
MariAnna O	Jane4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	12/14/2021	6/14/2022
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021	6/15/2022



4) Click on the filter arrow in *Acuity Due Date* and select 'Sort Oldest to Newest'

Excel screenshot showing the 'Acuity Due Date' filter menu. The menu is open over the 'ISP Due Date' column header, with 'Sort Oldest to Newest' selected. The spreadsheet data is as follows:

Case Manager Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent ACCESS Acuity Assessment	Most Recent Acuity Assessment Date
Shelby I Jane Doe	6/30/1900	6/30/1900		7/20/2021		6/30/1900
Shelby I James Doe	6/30/1900	6/30/1900		4/21/2021		6/30/1900
Molly HB James2 Doe	2/24/2020	8/24/2020	8/3/2018	7/22/2021		1/22/2022
Shelby I Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		1/22/2022
Shelby I James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		1/22/2022
Becky M Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		5/26/2022
Becky M James3 Test	5/25/2021	11/25/2021		11/29/2021		5/29/2022
Becky M James3 Doe	5/27/2021	11/27/2021		5/27/2021		6/1/2022
Molly HB Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		6/14/2022
Molly HB Jane2 Test	11/16/2021	5/16/2022		11/16/2021		6/14/2022
Molly HB James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021		6/14/2022
MariAnna O Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021		6/14/2022
MariAnna O James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019		6/14/2022
MariAnna O James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		6/14/2022
MariAnna O Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		6/15/2022

Excel screenshot showing the full spreadsheet with the 'Acuity Due Date' filter applied. The data is sorted by 'ISP Due Date' from oldest to newest. The spreadsheet data is as follows:

Case Manager Name	Date of most recent ISP	ISP Due Date	Date of most recent INITIAL Acuity Assessment	Date of most recent Acuity REASSESSMENT	Date of most recent CARE ACCESS Acuity Reassessment	Most Recent Acuity Assessment Date
Shelby I Jane Doe	6/30/1900	6/30/1900		7/20/2021	5/18/2020	6/30/1900
Shelby I James Doe	6/30/1900	6/30/1900		4/21/2021	7/20/2021	1/20/2022
Molly HB James2 Doe	2/24/2020	8/24/2020	8/3/2018	7/22/2021	10/28/2021	1/22/2022
Shelby I Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	7/22/2021	1/22/2022
Shelby I James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021	7/22/2021	1/22/2022
Molly HB Jane2 Doe	9/23/2021	3/23/2022		9/23/2021	9/23/2021	3/23/2022
Molly HB James2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	4/28/2022
Molly HB James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	5/16/2022
Molly HB James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/17/2021	5/17/2022
Becky M Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	11/24/2021	5/24/2022
Becky M James3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021	5/24/2021	5/24/2022
Becky M James3 Test	5/25/2021	11/25/2021		11/29/2021	11/26/2021	5/26/2022
Becky M James3 Test	5/25/2021	11/25/2021		11/29/2021	11/29/2021	5/29/2022
MariAnna O Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	6/1/2022
MariAnna O James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	6/14/2022
MariAnna O James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	12/14/2021	6/14/2022
MariAnna O Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021	12/14/2021	6/14/2022
MariAnna O James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021	12/15/2021	6/15/2022



- 5) Option to highlight those whose due dates are in the past (in this example, the day is 7/1/2022). Can also look at whose Acuity due date's are coming up. Note: *you can ignore the Acuity Due Date for those who do not have any Acuity assessment entered yet* Those are highlighted yellow in the example below and are still in need of their initial Acuity.

Case manager	Name	Date of most recent ISP	ISP Due Date	Acuity Assessment	recent Acuity REASSESSMENT	ACCESS Acuity Reassessment	Acuity Assessment	Acuity Due Date
Shelby I	Jane Doe		6/30/1900				1/0/1900	6/30/1900
Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020	7/20/2021	1/20/2022
Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022
Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022
Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		9/23/2021	3/23/2022
Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021	4/28/2022
Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	11/16/2021	5/16/2022
Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	11/17/2021	5/17/2022
Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021	11/24/2021	5/24/2022
Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021	11/24/2021	5/24/2022
Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021	5/26/2022
Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021		11/29/2021	5/29/2022
MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	12/1/2021	6/1/2022
MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	12/14/2021	6/14/2022
MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		12/14/2021	6/14/2022
MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021	6/15/2022