

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.

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.

Table of Contents

Running the Custom Report in CAREWare (Steps 1-3)	2
Additional tips for data manipulation in Excel	
How to see who has not had an ISP in the past 6 months	4
How to create a column that shows the ISP due date	7
How to create a column that shows most recent Acuity assessment1	1
How to create a column that shows the Acuity due date1	13



Instructions

 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

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Search: Acuity/ISP List (MCN	1)								
Name	CrossTab	Report Type	Description	Read Only	Date Created				
Acuity/ISP List (MCM)		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)

CAREWare Reports > Custom Reports >	Manage/Run Custom Reports > Acuity/ISP List (MCM) > F	Run Report								
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Run Report										
Date From:	07/01/2022									
Date Through:	07/31/2022									
Clinical Review Year:	2022									
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Show Clients with Service only:										
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Show Shared Service Records:		<u></u>								



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

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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 <u>carewaremahelpdesk@jsi.com</u> 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

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16	MariAnna O	Jane4 Test	5/3/2022	12/6/2019	12/14/2021											Ţ

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).

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8	Molly HB	Jane2 Test	11/16/2021		11/16/2021	6/4/2019
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11	Becky M	James3 Doe	5/27/2021		5/27/2021	11/24/2021
12	Becky M	Jane3 Test	12/30/2020	10/15/2018	11/26/2021	
13	Becky M	James3 Test	5/25/2021		11/29/2021	
14	MariAnna O	Jane4 Doe	12/1/2021	2/8/2019	12/1/2021	12/1/2020
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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).

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

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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.

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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.

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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".

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2) 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.

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10	Becky M	Jane3 Doe	5/24/2022			11/24/2021	5/24/202	1						
11	Becky M	James3 Doe	5/27/2021			5/27/2021	11/24/202	1						
12	Becky M	Jane3 Test	12/30/2020		10/15/2018	11/26/2021								
13	Becky M	James3 Test	5/25/2021			11/29/2021								
14	MariAnna O	Jane4 Doe	12/1/2021		2/8/2019	12/1/2021	12/1/202	כ						
15	MariAnna O	James4 Doe	12/14/2021		7/24/2018	12/13/2019	12/14/202	1						
16	MariAnna O	Jane4 Test	5/3/2022		12/6/2019	12/14/2021								-



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2 Shelby I	Jane Doe		6/30/1900									
3 Shelby I	James Doe		6/30/1900		7/20/2021	5/18/202	0					
4 Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021							
5 Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021							
6 Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021							
7 Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/202	1					
8 Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/201	9					
9 Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/202	1					
10 Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/202	1					
11 Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/202	1					
12 Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021							
13 Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021							
14 MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/202	0					
15 MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/202	1					
16 MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021							
17 MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021							
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3) Click on the filter arrow in ISP Due Date and select 'Sort Oldest to Newest"

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4 Shelby I	Jane Test		21	2/24/2020	7/22/2021	5/ 16/ 2020							
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6 Molly HB	Jane2 Doe	Filter by Color	> 2	2	9/23/2021								
7 Molly HB	James2 Doe	Date Filters	> 0	8/3/2018	4/21/2021	10/28/2021							
8 Molly HB	Jane2 Test		2	2	11/16/2021	6/4/2019							
9 Molly HB	James2 Test	Search (All)	2	2 12/16/2019	4/30/2021	11/17/2021							
10 Becky M	Jane3 Doe	(Select All)	2	2	11/24/2021	5/24/2021							
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12 Becky M	Jane3 Test	₽ 2021	2	1 10/15/2018	11/26/2021								
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2	Shelby I	Jane Doe		6/30/1900										
3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/202	20						
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/202	1						
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021								
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021								
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021								
8	Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021								
9	Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/202	1						
10	Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021								
11	Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/201	.9						
12	Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/202	1						
13	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/202	0						
14	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/202	1						
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021								
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021								
17	Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/202	1						-
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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.

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2	Shelby I	Jane Doe			6/30/1900											
3	Shelby I	James Doe			6/30/1900		7/20)/2021	5/18/2	020						
4	Molly HB	James2 Doe			6/30/1900	8/3/20	18 4/2:	/2021	10/28/2	021						
5	Shelby I	Jane Test	2/24/20	20	8/24/2020	2/24/20	20 7/22	2/2021								
6	Shelby I	James Test	2/24/20	20	8/24/2020	2/24/20	20 7/22	2/2021								
7	Becky M	Jane3 Test	12/30/20	20	6/30/2021	10/15/20	18 11/26	5/2021								
8	Becky M	James3 Test	5/25/20	21 1	1/25/2021		11/29)/2021								
9	Becky M	James3 Doe	5/27/20	21 1	1/27/2021		5/27	/2021	11/24/2	021						
10	Molly HB	Jane2 Doe	9/23/20	21	3/23/2022		9/23	3/2021								
11	Molly HB	Jane2 Test	11/16/20	21	5/16/2022		11/16	5/2021	6/4/2	019						
12	Molly HB	James2 Test	11/17/20	21	5/17/2022	12/16/20	19 4/30)/2021	11/17/2	021						
13	MariAnna O	Jane4 Doe	12/1/20	21	6/1/2022	2/8/20	19 12/1	/2021	12/1/2	020						
14	MariAnna O	James4 Doe	12/14/20	21	6/14/2022	7/24/20	18 12/13	3/2019	12/14/2	021						
15	MariAnna O	James4 Test	12/15/20	21	6/15/2022	12/15/20	12/15	5/2021								
16	MariAnna O	Jane4 Test	5/3/20	22	11/3/2022	12/6/20	19 12/14	/2021								
17	Becky M	Jane3 Doe	5/24/20	22 1	1/24/2022		11/24	/2021	5/24/2	021						
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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

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	Case Manager		Date of most		Acuity	recent Acuity	ACCESS Acuity		ן∂ Reapply			
1	Name 🔹	Name 💌	recent ISP 🔹	ISP Due Date 🖃	Assessment 🔹	REASSESSMEN1 -	Reassessment 💌					
2	Shelby I	Jane Doe		6/30/1900								
3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020					
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021					
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021						
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021						
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021						
8	Becky M	James3 Test	5/25/2021	. 11/25/2021		11/29/2021						
9	Becky M	James3 Doe	5/27/2021	. 11/27/2021		5/27/2021	11/24/2021					
10	Molly HB	Jane2 Doe	9/23/2021	. 3/23/2022		9/23/2021						
11	Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019					
12	Molly HB	James2 Test	11/17/2021	. 5/17/2022	12/16/2019	4/30/2021	11/17/2021					
13	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020					
14	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021					
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021						
16	MariAnna 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**".

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

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2	Shelby I	Jane Doe		6/30/190	r i i	Long Date										
3	Shelby I	James Doe		6/30/190		Most Recent Acui	ty Assessment		5/18/2020							
4	Molly HB	James2 Doe		6/30/190	\bigcirc	Time			10/28/2021							
5	Shelby I	Jane Test	2/24/2020	8/24/202	(L)	Most Recent Acui	h/ Assessment									
6	Shelby I	James Test	2/24/2020	8/24/202	<u> </u>	mostracentraca										
7	Becky M	Jane3 Test	12/30/2020	6/30/202	0/_	Percentage										_
8	Becky M	James3 Test	5/25/2021	. 11/25/202	/0	Most Recent Acui	ty Assessment									_
9	Becky M	James3 Doe	5/27/2021	. 11/27/202	1 /	Fraction			11/24/2021							_
10	Molly HB	Jane2 Doe	9/23/2021	. 3/23/202	1/2	Most Recent Acui	ty Assessment	_								
11	Molly HB	Jane2 Test	11/16/2021	. 5/16/202				-	6/4/2019							
12	Molly HB	James2 Test	11/17/2021	. 5/17/202	M	ore Number Format	s		11/17/2021							
13	MariAnna O	Jane4 Doe	12/1/2021	. 6/1/202.	<u> </u>	2/8/2019	12/1/2021	T.	12/1/2020							
14	MariAnna O	James4 Doe	12/14/2021	. 6/14/2022	2	7/24/2018	12/13/2019	1	12/14/2021							
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	2	12/15/2020	12/15/2021									
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	2	12/6/2019	12/14/2021									-

3) 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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1	Name	Name	recent ISP	ISP Due Date	Assessment	REASSESSMENT	Reassessment	Assessment				
2	Shelby I	Jane Doe		6/30/1900				=MAX(E2:G2)	1			
3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020					
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021					
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021						
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021						
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021						
8	Becky M	James3 Test	5/25/2021	. 11/25/2021		11/29/2021						
9	Becky M	James3 Doe	5/27/2021	. 11/27/2021		5/27/2021	11/24/2021					
10	Molly HB	Jane2 Doe	9/23/2021	. 3/23/2022		9/23/2021						
11	Molly HB	Jane2 Test	11/16/2021	. 5/16/2022		11/16/2021	6/4/2019					
12	Molly HB	James2 Test	11/17/2021	. 5/17/2022	12/16/2019	4/30/2021	11/17/2021					
13	MariAnna O	Jane4 Doe	12/1/2021	. 6/1/2022	2/8/2019	12/1/2021	12/1/2020					
14	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021					
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021						
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021						



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3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020	7/20/2021						
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021						
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021						
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021						
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021						
8	Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021		11/29/2021						
9	Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/2021	11/24/2021						
10	Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		9/23/2021						
11	Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/2019	11/16/2021						
12	Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/2021	11/17/2021						
13	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	12/1/2021						
14	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	12/14/2021						
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021						
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		12/14/2021						
17	Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021	11/24/2021						
18									5.					-

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'.

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2	Shelby I	Jane Doe		6/30/1900				1/0/1900				
3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020	7/20/2021				
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021				
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021				
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021				
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021				
8	Becky M	James3 Test	5/25/2021	. 11/25/2021		11/29/2021		11/29/2021				
9	Becky M	James3 Doe	5/27/2021	. 11/27/2021		5/27/2021	11/24/2021	11/24/2021				
10	Molly HB	Jane2 Doe	9/23/2021	. 3/23/2022		9/23/2021		9/23/2021				
11	Molly HB	Jane2 Test	11/16/2021	. 5/16/2022		11/16/2021	6/4/2019	11/16/2021				
12	Molly HB	James2 Test	11/17/2021	. 5/17/2022	12/16/2019	4/30/2021	11/17/2021	11/17/2021				
13	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/2020	12/1/2021				
14	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/2021	12/14/2021				
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021				
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		12/14/2021				v



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".

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2) 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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1	Name	Name	recent ISP	ISP Due Date	Assessment	REASSESSMENT	Reassessment	Assessment	Date				
2	Shelby I	Jane Doe		6/30/1900				1/0/1900	=EDATE(H2,6)				
3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/202	7/20/2021					_
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/202	1 10/28/2021					
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021					
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021					
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021					
8	Becky M	James3 Test	5/25/2021	11/25/2021		11/29/2021		11/29/2021					
9	Becky M	James3 Doe	5/27/2021	11/27/2021		5/27/2021	11/24/202	1 11/24/2021					
10	Molly HB	Jane2 Doe	9/23/2021	3/23/2022		9/23/2021		9/23/2021					
11	Molly HB	Jane2 Test	11/16/2021	5/16/2022		11/16/2021	6/4/201	9 11/16/2021					
12	Molly HB	James2 Test	11/17/2021	5/17/2022	12/16/2019	4/30/2021	11/17/202	1 11/17/2021					
13	MariAnna O	Jane4 Doe	12/1/2021	6/1/2022	2/8/2019	12/1/2021	12/1/202	12/1/2021					
14	MariAnna O	James4 Doe	12/14/2021	6/14/2022	7/24/2018	12/13/2019	12/14/202	1 12/14/2021					
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021					
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2	Shelby I	Jane Doe		6/30/1900				1/0/1900	6/30/1900				
3	Shelby I	James Doe		6/30/1900		7/20/2021	5/18/2020	7/20/2021	1/20/2022				
4	Molly HB	James2 Doe		6/30/1900	8/3/2018	4/21/2021	10/28/2021	10/28/2021	4/28/2022				
5	Shelby I	Jane Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022				
6	Shelby I	James Test	2/24/2020	8/24/2020	2/24/2020	7/22/2021		7/22/2021	1/22/2022				
7	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021	5/26/2022				
8	Becky M	James3 Test	5/25/2021	. 11/25/2021		11/29/2021		11/29/2021	5/29/2022				
9	Becky M	James3 Doe	5/27/2021	. 11/27/2021		5/27/2021	11/24/2021	11/24/2021	5/24/2022				
10	Molly HB	Jane2 Doe	9/23/2021	. 3/23/2022		9/23/2021		9/23/2021	3/23/2022				
11	Molly HB	Jane2 Test	11/16/2021	. 5/16/2022		11/16/2021	6/4/2019	11/16/2021	5/16/2022				
12	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				
13	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				
14	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				
15	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021	6/15/2022				
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		12/14/2021	6/14/2022				
17	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

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15 MariAnna O James4 Test 12/15/2021 6/15/2022 12/15/2021 12/15/2021 12/15/2022	_



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

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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.

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8	Molly HB	Jane2 Test	11/16/2021	. 5/16/2022		11/16/2021	6/4/2019	11/16/2021	5/16/2022				
9	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				
10	Becky M	James3 Doe	5/27/2021	. 11/27/2021		5/27/2021	11/24/2021	11/24/2021	5/24/2022				
11	Becky M	Jane3 Doe	5/24/2022	11/24/2022		11/24/2021	5/24/2021	11/24/2021	5/24/2022				
12	Becky M	Jane3 Test	12/30/2020	6/30/2021	10/15/2018	11/26/2021		11/26/2021	5/26/2022				
13	Becky M	James3 Test	5/25/2021	. 11/25/2021		11/29/2021		11/29/2021	5/29/2022				
14	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				
15	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				
16	MariAnna O	Jane4 Test	5/3/2022	11/3/2022	12/6/2019	12/14/2021		12/14/2021	6/14/2022				
17	MariAnna O	James4 Test	12/15/2021	6/15/2022	12/15/2020	12/15/2021		12/15/2021	6/15/2022				
18													
10													1 - 1