MISSOULA-VITAS QUALITY OF LIFE INDEX
DATE DUE AND STATUS
EXCEL INSTRUCTIONS

TO BEGIN

It is important to create your own DateDue document. Your DateDue document will be used to record patient information. The original DateDue document should only be used as a template to create more of your own DateDue documents following the instruction below. Up to 200 patients can be recorded on a single DateDue document.

In Microsoft Excel…

- Open the **DATEDUE** document.
  - Select the **FILE** menu
  - Select **OPEN**
  - At the "Look In" prompt, select the directory where the *MVQOLI* files are located.
  - Select the **DATEDUE** document
  - Select the **OPEN** button.

    The following message may appear

    "The workbook you are opening contains macros…"

    Select ENABLE MACROS

- **SAVE** the DATEDUE document to a **NEW FILE NAME**.
  - Select the **FILE** menu
  - Select **SAVE AS**
  - At the "Save In" prompt, select your *MVQOLI* directory.
  - At the File name prompt, type the **new file name** *(e.g. DateDue1)*
  - Select the **SAVE** button

- **CLOSE** the document
  - Select the **FILE** menu
  - Select **CLOSE**

When you have exceeded 200 patients, repeat this process.

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OPEN YOUR DATEDUE DOCUMENT

- Select the **FILE** menu
- Select **OPEN**
- At the "Look In" prompt, select the directory where the *MVQOLI* files are located.
- Select **Your DateDue document**
- Select the **OPEN** button.

The following message may appear

"The workbook you are opening contains macros…"

Select ENABLE MACROS

NOTE: The Full Screen Viewing format is turn on when this document is opened and turned off when the document is closed.

REMEMBER TO SAVE

It is a good idea to save information on a regular basis, preferably after a few entries, before moving between tabs, and prior to closing the document.

To Save and Continue

- Select the **FILE** menu, at the top of the screen
- Select **SAVE**.

CLOSING DOCUMENT

- Select the **FILE** menu
- Select **SAVE**
- Select the **FILE** menu again
- Select **CLOSE**

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The DATEDUE document contains 4 tabs or pages: Date Due, Status, Status Report–All Entries, and Team Status Report.

DATE DUE The Date Due page automatically generates the dates subsequent MVQOLI should be delivered based on the patient's admission date. MVQOLI internals are admission, 20th, 45th, 75th, 105th, 165th, 225th, and 285th day of care. Patient name, Team, Admit Date, and Discharge Date are recorded on this page. Reports can be printed by team and filtered to display active patients only.

STATUS The Status page is used to record the status type of 5 MVQOLI for each patient. There are 4 status types: Complete, Decline, Unable, and Always Unable. The reports "Status Report–All Entries" and "Team Status Report" are generated from information on this page. The Status page also contains a search tool to locate patient information quickly.

STATUS REPORT–ALL ENTRIES

The Status Report–All Entries page automatically calculates the total number of MVQOLI by status type for the first 5 MVQOLI. This report calculates all entries from information recorded on the Status page. Refer to the Team Status Report page for team specific totals.

TEAM STATUS REPORT

The Team Status Report page automatically calculates the total number of MVQOLI by status type for the first 5 MVQOLI of a selected team or all teams. There are 5 tables on this page, one for each MVQOLI. Team specific reports require the user to select the desired team in all 5 tables. This page also contains 2 action buttons: REFRESH and ALL TEAMS. The REFRESH button recalculates newly recorded information for team specific reports. The ALL TEAMS button recalculates newly recorded information for all teams.

To move between tabs or pages…

Click on the desired tab or page at the bottom of the screen.
OR
Press CTRL-PageUp and CTRL-PageDown.

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DATE DUE

The Date Due page automatically generates the dates subsequent MVQOLI should be delivered based on the patient's admission date. MVQOLI intervals are admission, 20th, 45th, 75th, 105th, 165th, 225th, and 285th day of care. Reports can be printed by team and filtered to display active patients only.

New Patient Information

- Open YOUR DateDue document *(e.g. DateDue1)*
- Select the **DATE DUE** tab
- In the Patient Name column, move down to the next blank cell
  Shortcut Key Tip
  Press Ctrl↓ and then ↓, moves cursor down to next available cell within column
- Type the patient's **name**.
- Press **TAB** key or right arrow key (→).
- In the Team column, type the patient's **team**.
- Press **TAB** key or right arrow key (→).
- In the Admit Date column, type the patient's **admission date**.
- Press **ENTER**.
  Entry of the admit date will populate the "Admission" and "Day of Care" columns.
- Remember to **SAVE**.

Recording Discharge Dates

Active patient reports are based on the blanks in this field. Therefore, accurate reports require discharge dates to be recorded.

- Select the **DATE DUE** tab
- Move to the desired patient record, using the UP (↑) and DOWN (↓) arrow keys.
- Using **TAB** key or right arrow key (→) , move to the Discharge Date column.
- Type the discharge **date**
- Remember to **SAVE**

Printing Date Due Page

- Select **FILE** menu
- Select **PRINT**
- Select **OK** button
  To print or view team specific and/or active patients,
  refer to the instructions for Date Due Reports.

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DATE DUE REPORTS

The following instructions allow the user to generate reports that display team specific and/or active patient information.

Date Due – Team Specific Report

- Select the **DATE DUE** tab
- On the menu bar at the top of the screen, select **DATA**
- Point to **FILTER**
- Select **AUTOFILTER,** *an arrow box will appear in the column headers*
- Press **CTRL-HOME**
- In the header of the Team column, click on the **arrow box**. *A list of teams will appear.*
- Select the desired **team.** *Only records of the selected team will appear*.

To view another team…

- Select the team column **arrow box**
- Select another **team**

To Print…Select **FILE** menu, **PRINT**, and **OK**.

TURN FILTER OFF when finished to display all patients again…

- On the menu bar at the top of the screen, select **DATA**
- Point to **FILTER**
- Select **AUTOFILTER**

Date Due – Active Patient Report

- Select the **DATE DUE** tab
- On the menu bar at the top of the screen, select **DATA**
- Point to **FILTER**
- Select **AUTOFILTER,** *an arrow box will appear in the column headers*
- Press **CTRL-HOME**
- In the header of the Discharge Date column, click on the **arrow box**.
- Select **BLANKS.** *Only records of active patients (no discharge date) will appear*.

To Print…Select **FILE** menu, **PRINT**, and **OK**.

TURN FILTER OFF when finished to display all patients again…

- On the menu bar at the top of the screen, select **DATA**
- Point to **FILTER**
- Select **AUTOFILTER**

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Date Due – Active Patients for a Specific Team

- Select the **DATE DUE** tab
- On the menu bar at the top of the screen, select **DATA**
- Point to **FILTER**
- Select **AUTOFILTER,** *an arrow box will appear in the column headers*
- Press **CTRL-HOME**
- In the header of the Discharge Date column, click on the **arrow box**.
- Select **BLANKS.** *Only records of active patients (no discharge date) will appear*.
- In the header of the Team, click on the **arrow box**
- Select the desired **team**.

To view another teams active patients…

- Select the team column **arrow box**
- Select another **team**

To Print…Select **FILE** menu, **PRINT**, and **OK**.

TURN FILTER OFF when finished to display all patient again…

- On the menu bar at the top of the screen, select **DATA**
- Point to **FILTER**
- Select **AUTOFILTER**

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<u>STATUS</u>

The Status page allows the user to record the status type of each MVQOLI for each patient. There are 4 status types: Complete, Decline, Unable, and Always Unable.

New Patient Information

- Select the **STATUS** tab
- In the Patient Name column, move down to the next blank cell
  Shortcut Key Tip
  Press Ctrl↓ and then ↓, moves cursor down to next available cell within column
- Type the patient's **name**.
- Press **TAB** key or right arrow key (→).
- In the Team column, type the patient's **team**.
- Press **TAB** key or right arrow key (→).

Recording MVQOLI Status

With the Status page on the screen…

- Move to the desired patient record
  To move to a specific patient…
  - Use the UP (↑) and DOWN (↓) arrow keys.

  OR
  - In the Patient Name column header, there is an arrow box (▼)
  - Click on the arrow box (▼), this will display a list of patient names
  - Click on the desired patient. The selected patient record will be display only.
- Using the right arrow key (→) , move to the first blank DATE column.
- Type the MVQOLI **date**
- Press **TAB** key or right arrow key (→)
- In the MVQOLI-# column, click on the **drop-down list box** in the CELL
  (**NOT THE COLUMN HEADER ARROW BOX, THE <u>CELL BOX</u>**)
- In the drop-down list box, select the **status type**.
- Remember to **SAVE**

NOTE: If patients were selected using the Patient Name header arrow box, display all patients again...
  - Click on the arrow box (▼), In the Patient Name column header
  - Click on the option (All).

Printing Status Page

- Select **FILE** menu
- Select **PRINT**
- Select **OK** button
  To print or view team specific reports, refer to the instructions for Team Status Report.

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STATUS REPORT – ALL ENTRIES

The Status Report–All Entries page automatically calculates the total number of MVQOLI by status type for the first 5 MVQOLI. This report calculates all entries from information recorded on the Status page. Refer to the Team Status Report page for team specific totals.

No information can be entered on this page. Status information should be recorded on the Status page.

Printing Status Report – All Entries Page

- Select the **STATUS REPORT – ALL ENTRIES** tab.
- Select **FILE** menu
- Select **PRINT**
- Select **OK** button
  To print or view team specific reports, refer to the instructions for Team Status Report.

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TEAM STATUS REPORT

The Team Status Report page automatically calculates the total number of MVQOLI by status type for the first 5 MVQOLI of a selected team or all teams. There are 5 tables on this page, one for each MVQOLI. Team specific reports require the selection of a desired team in all 5 tables.

To Generate Reports For All Teams

- Select the **TEAM STATUS REPORT** tab.
- Click on the **ALL TEAMS** button.

To Generate Reports For A Specific Team

- Select the **TEAM STATUS REPORT** tab.
- Click on the **REFRESH** button. *This recalculates any new information on the status page.*
- On the first row of each table is labeled "Team".
- To the right of the TEAM label is a box labeled (ALL) and a drop-down box (▼)
- Click on this **drop-down box**. *A list of teams will appear.*
- Click on the **desired team**. *The team selected will appear within this table only.*
- Continue to **select** the desired team for **all 5 tables**.

To view another team, repeat the steps above.

Printing Team Status Report

With the desired team selected for all 5 tables…

- Select **FILE** menu
- Select **PRINT**
- Select **OK** button

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