Creating a Referrals Report for: The Number of Days between Date Referred to Date Scheduled

The following Guide provides information on how to calculate and obtain the number of days between the date that the Referrals was generate and the date that the referral was scheduled.

1. Depending on the number of Referrals you need to audit or report on, select the appropriate category. To include all Referrals, select the **All** Category in your SENT or RECEIVED Referral Worklist:

2. Sort the Worklist by clicking on the heading of either "Date Referred" or "Scheduled" depending on your need. (You can also sort the Worklist once you create your Excel spreadsheet).
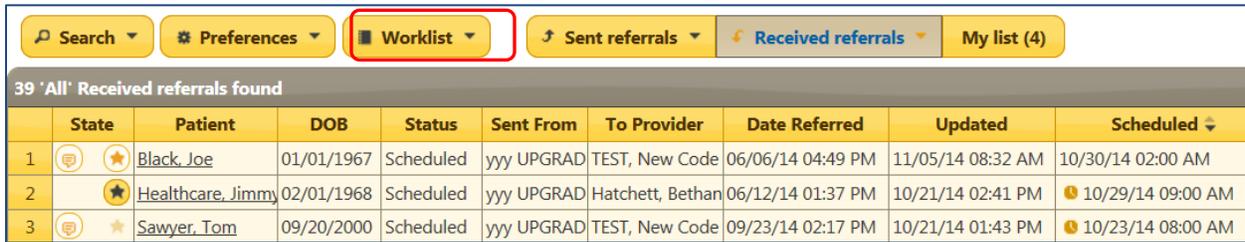

Hint: You can also use the **Search** feature to narrow down the list of Referrals.

3. Click on Worklist

4. The following screen will display. Click on **Export Worklist**.
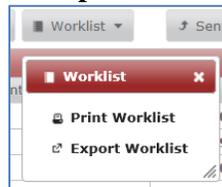
5. You will see the following popup at the bottom of your computer screen. Select **open**
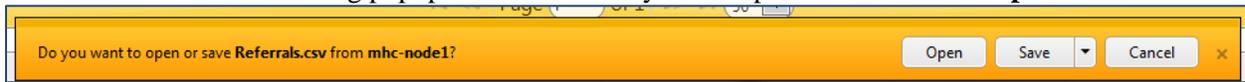
6. Typically, the spreadsheet **columns** will need to be adjusted to display the information in each cell.

7. Once the columns have been adjusted, right-click on the **Updated** column and select **Delete**.

8. **IMPORTANT: WE STRONGLY RECOMMEND THAT YOU ALSO DELETE THE "<u>PATIENT</u>" COLUMN TO MAINTAIN PATIENT CONFIDENTIALITY AND ELIMINATE A POTENTIAL HIPPA VIOLATION.**

9. Create an additional column entitled "Net Days" or title of your choice. Then create the following formula for the cells in this column: =NETWORKDAYS(E2,F2) . This will calculate the number of days between when the date the Referral was generated and the date it was scheduled.

   *Note: In the example below displays Column G as the newly created column as the **Contacted** and **Assigned to User** columns were deleted prior to creating the **Net Days** Column.*

IMPORTANT TO NOTE: The **"E2,F2"** within the parenthesis in the example above will need to be changed depending on the corresponding columns for **Referred** and **Scheduled** in your spreadsheet.

10. You will be able to use this format for all the other rows that have a Scheduled appointment within the **Scheduled** column. Copy and Paste the formula into the corresponding rows (or click and drag the initial cell down through the descending cells in column G).

Creating the Average Number of Days

You can create an average number of days from the Referred Date to the Scheduled date through the following steps:

1. Clicking in the cell below the last numbered cell in the **Net Days** column

	A	B	C	D	E	F	G
1	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100
4	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	23
5	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8
6	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4
7	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 16:52	9/18/2014 1:00	75
8	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	TEST Specialist 2	6/6/2014 14:32	6/11/2014 1:00	4
9	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 11:51	6/10/2014 10:00	3
10	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/5/2014 16:10	6/6/2014 1:00	2
11							

2. select the **Sum** icon **Σ ▾** in the upper Right Hand section of the Home screen and then select **Average.**
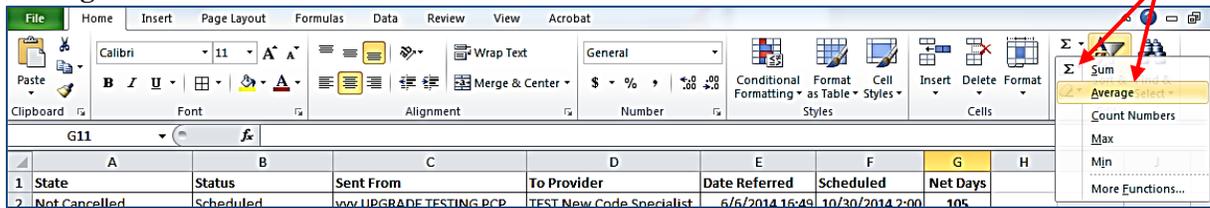
3. Make sure that the **Average** feature captures all cells in that colum.

	A	B	C	D	E	F	G	H	I
1	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days		
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105		
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100		
4	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	23		
5	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8		
6	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4		
7	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 16:52	9/18/2014 1:00	75		
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9	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 11:51	6/10/2014 10:00	3		
10	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/5/2014 16:10	6/6/2014 1:00	2		
11							=AVERAGE(G2:G10)		
12							AVERAGE(**number1**, [number2], ...)		
13									

4. Select the **Enter** or the **Return** key on your keyboard. The average Net Days will display as in the example below:

G11 =AVERAGE(G2:G10)

|	A	B	C	D	E	F	G
1	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100
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5	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8
6	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4
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8	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	TEST Specialist 2	6/6/2014 14:32	6/11/2014 1:00	4
9	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 11:51	6/10/2014 10:00	3
10	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/5/2014 16:10	6/6/2014 1:00	2
11							36
12							

Hints:

1. You can also **sort** your columns based on need, i.e. by **Net Days**, **Status**, **Sent From**, etc. by selecting the **Sort & Filter** icon.
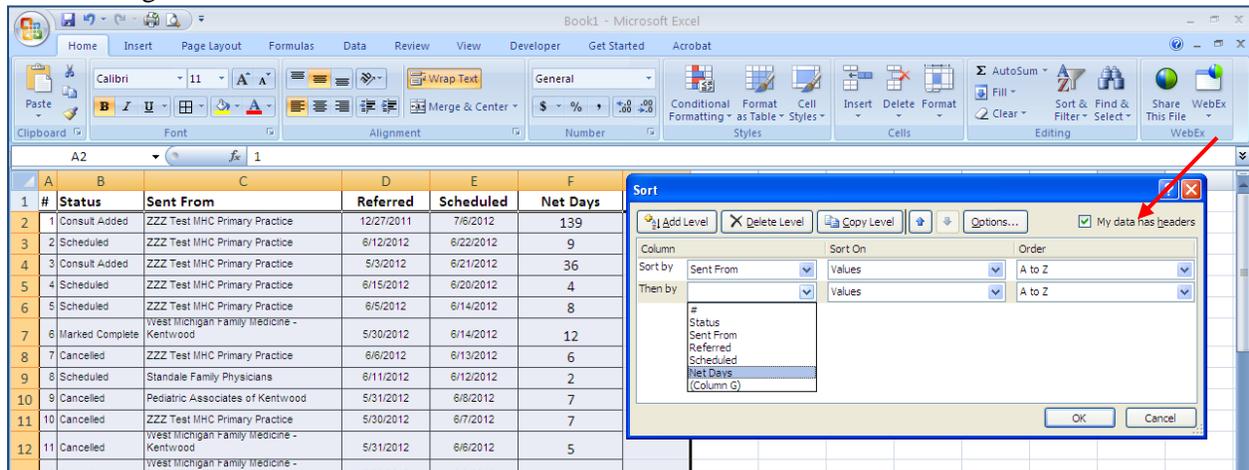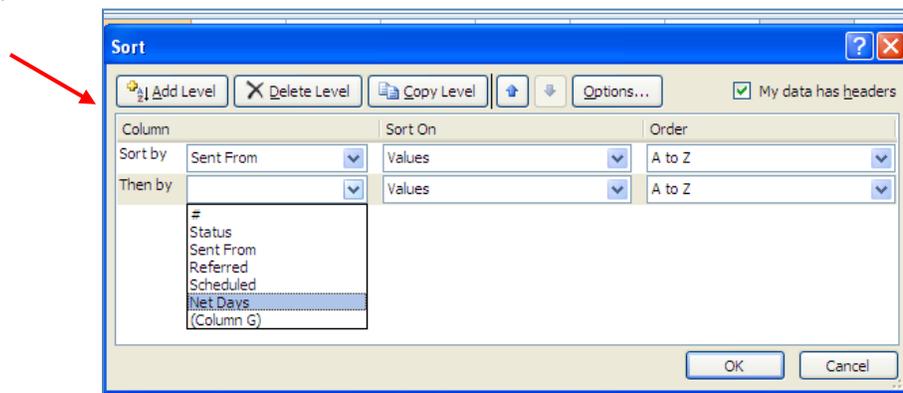

2. If the **Sort & Filter** icon does not display, make sure that you are on the **Home** tab.

3. To view the titles for each column, make sure that you have **My data has headers** box checked.
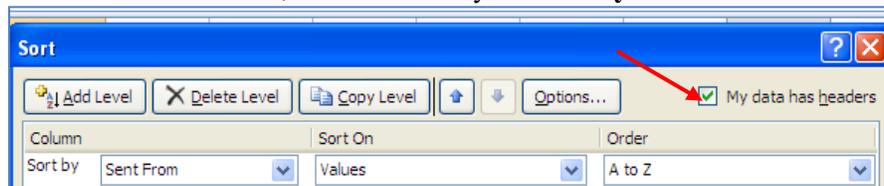
4. You can also add additional filtering by selecting the **Add Level** button and then selecting additional options.

Note: You can use the **Contacted** and **Assigned to User** Columns to evaluate whether contacting the patient or who the Referral was assigned to impacts the number of days it takes to schedule the appointment.