

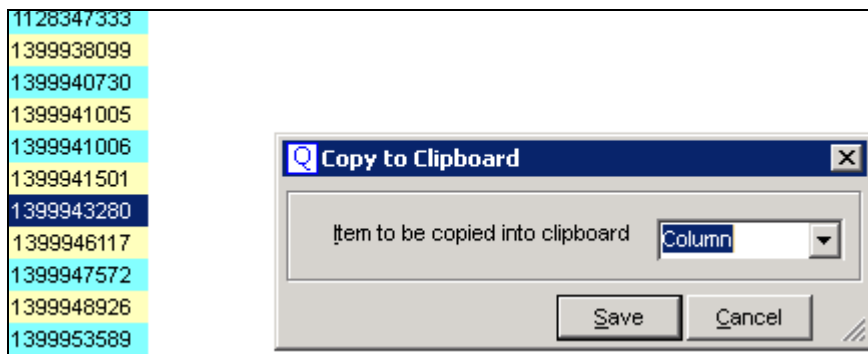
Clients with No Recent Services and Mass Care Plan Closing

A good best practice to keep your data and client list accurate is to close care plans for clients who haven't received services in 12-18 months (or longer if it makes sense for your agency).

There are two queries that need to be run in Q, then compared to each other using Excel.

Finding Clients with Service Units

1. Go to the Query: Clients with Service Units in a Time Interval.
2. Select the **Agency** and **Service** then select the time range that is acceptable usage (ex. last 12 months or 24 months or last fiscal year). Select **Active and Inactive** for the Active Field. You can leave funding source blank unless you have multiple funding sources for the Service you selected. Site is also optional, unless you only want clients for a specific site. Click **Query**.
3. Ensure that **ONLY** the Client ID is visible. If not, right click and select **Add Columns** to add and/or remove columns in the grid view. OR you can right click and select **Column Settings** and apply the **Client ID ONLY** setting to the grid view.
4. With only the Client ID visible, right click and select **Copy to Clipboard**. You can use Column or Entire Grid in the drop down menu. Click **Save**.



5. Launch Excel and in **Cell A2**, paste the information that was copied to the Clipboard (Ctrl-V or right click and select Paste). In cell A1, type *Received*.

Finding Clients with Active Care Plans

1. Go back into Q.
2. Go to the Query: Clients Receiving Service (Detailed). Select the same Agency and Service as in Step 1 of the previous section and the funding source if you used. Type today's date for the Start and the End date fields (*hint: space bar select's today's date*).

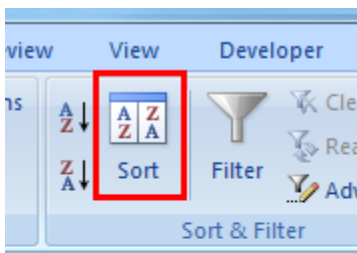
3. Ensure that **ONLY** the Client ID is visible. If not, right click and select **Add Columns** to add and/or remove columns in the grid view. OR you can right click and select **Column Settings** and apply the **Client ID ONLY** setting to the grid view.
4. With only the Client ID visible, right click and select **Copy to Clipboard**. You can use Column or Entire Grid in the drop down menu. Click **Save**.
5. Go back to Excel.
6. In **Cell B2**, paste the information that was copied to the Clipboard (Ctrl-V or right click and select Paste). In cell B1, type *Eligible*.
7. Now you should have an excel spreadsheet with two columns of data. The first one is a list of clients that have received service units in the recent past (column A) and the second one is a list of clients that have active Care Plans (Column B). You want to know which clients are in the second column but not in the first one.

Comparing the Data

1. Click in the cell C1 and type *Match*.
2. In cell C2, type the following formula **=MATCH(B2,A:A,0)**
3. Copy the contents of C2 to all cells of column C (a quick way to do this is to click on the small square in the bottom right of the cell border and drag down to the last row that has data in Column B).

A	B	C	D	E
Received	Eligible	Match		
112324389	112324389	2		
122350572	122350572			
218353333	218353333			
314369046	314369046			
405349046	405349046			
424130382	424130382			

4. Go to the Data tab and click on Sort



B	C
303265432	1
308234114	#N/A
330371553	3
517302669	#N/A

- Sort by Column C (Match) and make the Order **Largest to Smallest**. Ensure that **My data has headers** is checked.



- Click the OK button.
- All the rows that have #N/A are Clients that have NOT had service units in the recent past.

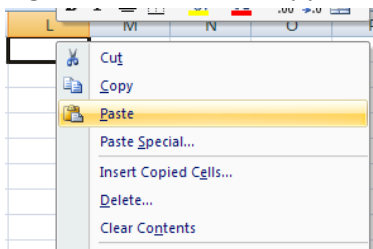
Getting the List of Clients with No Recent Service Units

Now that you have a list of all clients who have active care plans for no service units in the last time period you defined (12-18 months for example), you can close out the Care Plans in mass for all these clients.

- Now highlight and copy all of the ID numbers in Column B that have a #N/A in Column C.

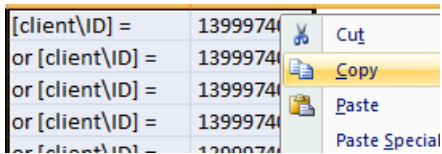
B	C
1399974352	#N/A
1399974365	#N/A
1399974373	#N/A
1399974375	#N/A
1399974838	#N/A
1399974861	220
1399974852	219
1399974051	219

- Right click and select Copy. Then in cell G1, select Paste.

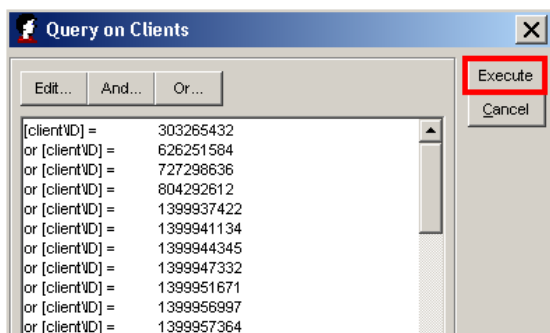


- In Cell F1 type **[client\ID] =**
- In Cell F2 type **or [client\ID] =**

5. Copy **Cell F2** all the way down the column, until you get to the last row of data in column L. You should see something similar to the graphic below. *Remember: Only column K1 should have [client\ID]; or [client\ID] should appear in all cells below K1. If not, you need to repeat Steps 4 and 5.*
6. Copy all the data in columns F and G



- 7.
8. Go back to Q and single click the Query: **Clients Receiving Services (Detailed)**.
9. Click on the Ad Hoc button.
10. Paste the data that you copied from Excel (columns F and G).
11. Click the Execute button.



12. Do not change anything in the query window, just click Query.
13. Now you have the list of clients that have not had services recently but have an active care plan.

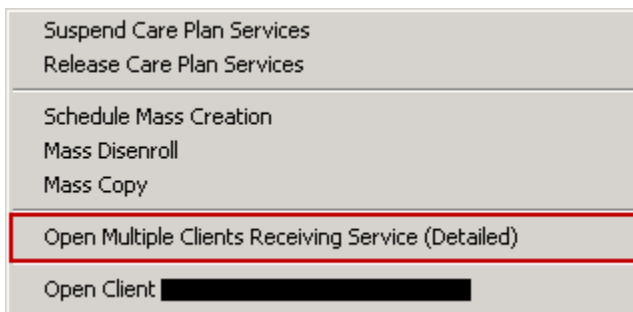
Closing Care Plans

Now you can decide if you want to individually close care plans, do them in small groups or make mass changes.

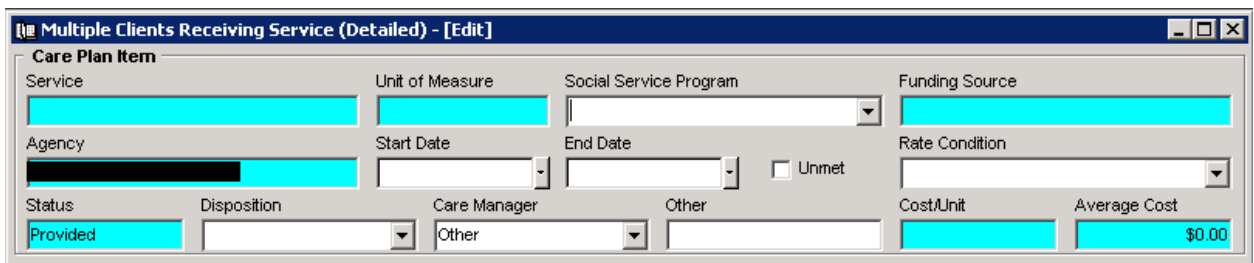
If closing individual care plans, double-click the client record; enter an **End Date** and change the **Disposition** field. Save the record.

If you want the same End date and disposition for a group of clients or ALL clients in the list, follow the instructions starting with **Step #3**.

1. Group of clients: Shift select a range of clients or Ctrl-Select clients
2. All clients in the list: Ctrl-A to select all clients
3. Right click and select Open Multiple Clients Receiving Service (Detailed)

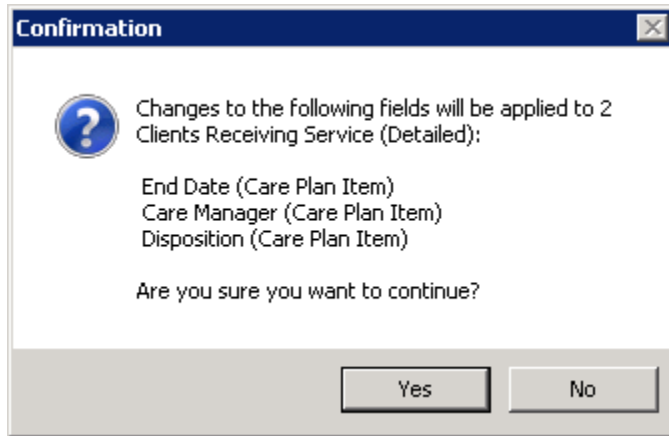


- 4.
5. Click the Edit button. You should see an “empty” care plan with just your Agency’s name.



- 6.
7. Select an **End Date** that is to be applied to all care plans for selected clients (end of the current fiscal year or end of the month for example).
8. Select a **Disposition** to be applied to **all care plans** for selected clients.

9. When you click the Save button, you will see a confirmation screen similar to the one below, however the number of clients will be the number you've selected. Note: you may receive an error message regarding the Care Manager field. If you do, select Other from the drop down.



If you made a mistake and don't want to make the mass changes, click No. If you are sure the information is correct, click the Yes button.

You will receive a confirmation that the mass changes have been made to the number of client records that were selected or in your entire list.

Note: There is a Mass Disenroll option that you can see when you Right click after selecting some or all of the clients in your list. It will only apply the End Date to the care plans. You will need to go back and enter a disposition for each care plan you closed, so while it's tempting to select this option, it is better to use the Open Multiple... option.

If you need to apply the same disposition changes to a smaller number of records, such as deceased, you can still use the Open Multiple... option, by selecting only a portion of the client records in the list (Shift-Select or Ctrl-Select).