

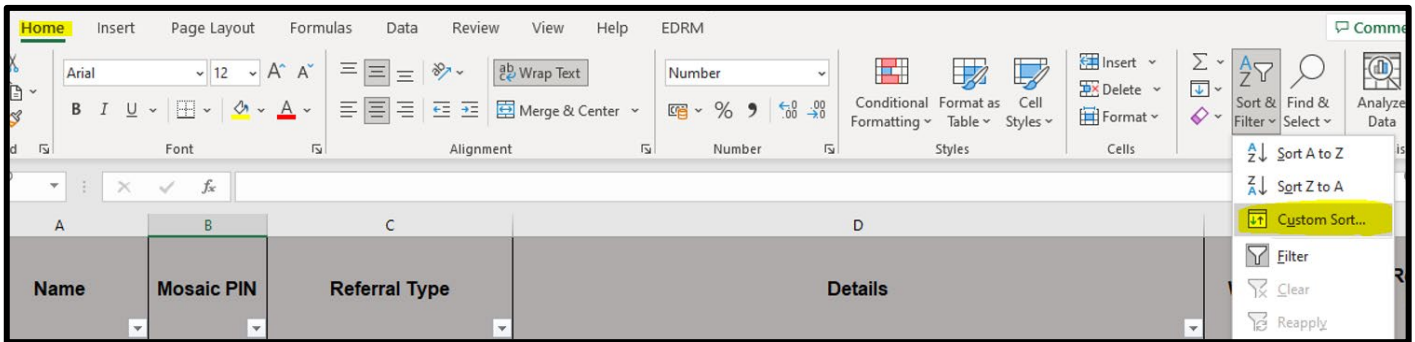
## Waiting List Prioritisation Spreadsheet – A How to Guide

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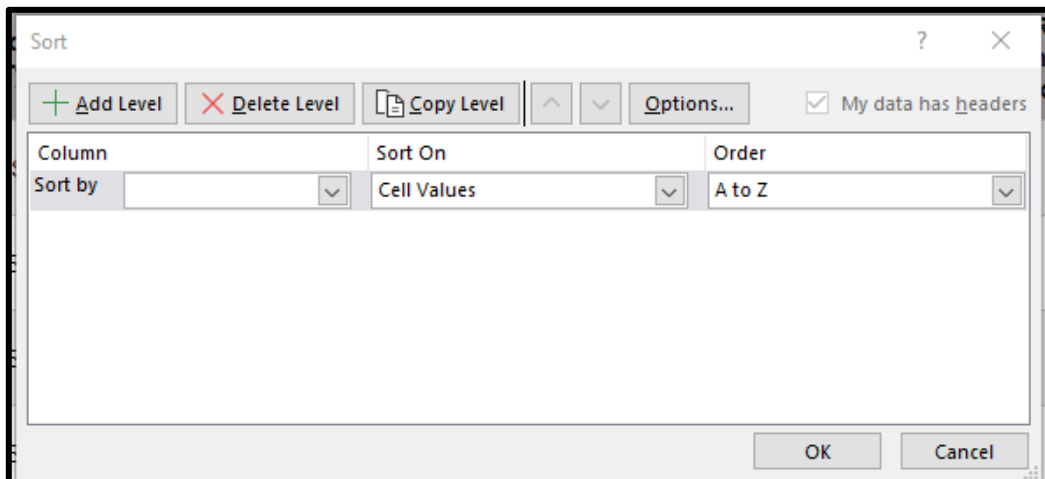
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### **How to sort your waiting list:**

On the Home tab, find the Sort and Filter button and select Custom Sort.



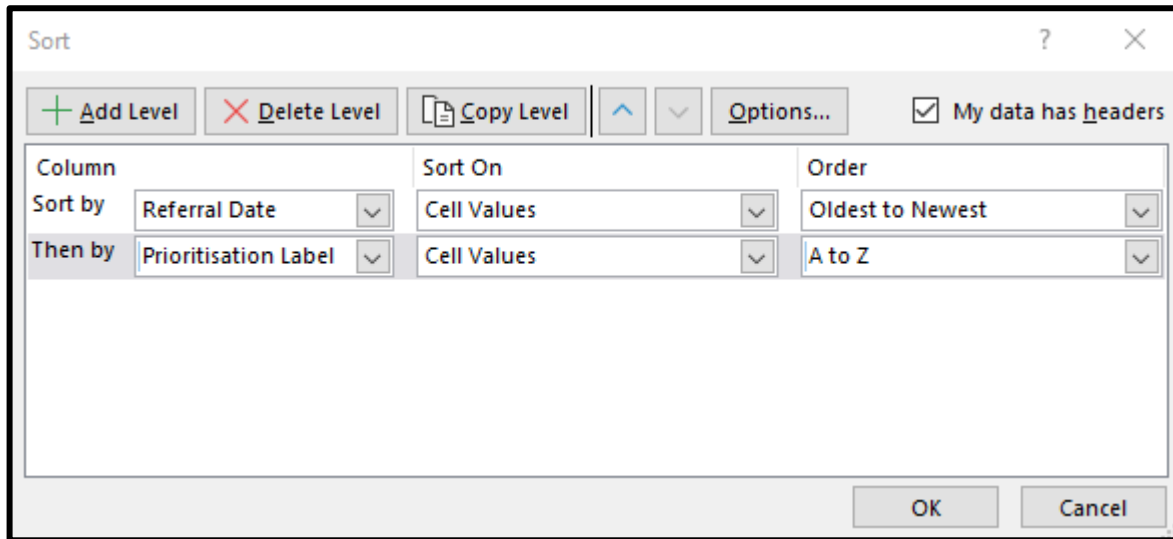
You'll then get a box like below:



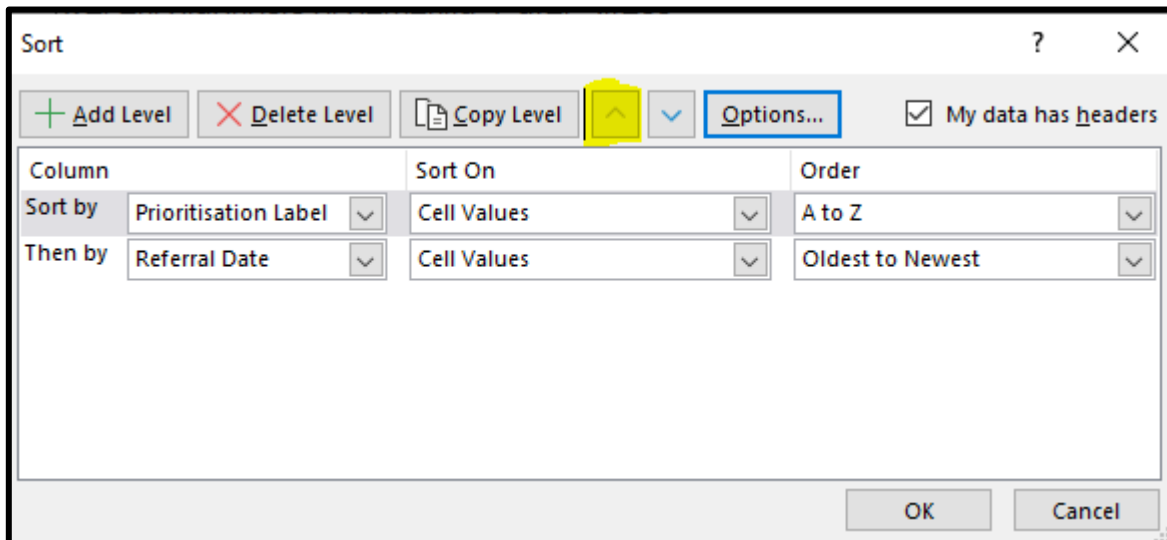
You can now sort the data by referral date or any other heading.

You can also, for example, "Add Level" so you can sort the data by referral date and then by prioritisation label.

You do this by clicking "Add Level" and then choose the "Sort By" that you want. Below is an example of what it would look like if you were sorting the data by referral date and then by prioritisation label. This will group the referrals by date first, and then by label – so all the lows from one date, followed by the mediums for that date and so on.



If you wanted the data to be sorted by prioritisation label first, and THEN by date, you need to change the priority order of the sorting criteria. You do this by clicking the arrow highlighted, so that that the criteria you want the data sorted by first, is on top – see below. There are two arrows (up and down) so you can change the priority of the criteria several times.



You can also “Delete Level” so that data is sorted by one criteria if you want the data putting back in just the standard date order.

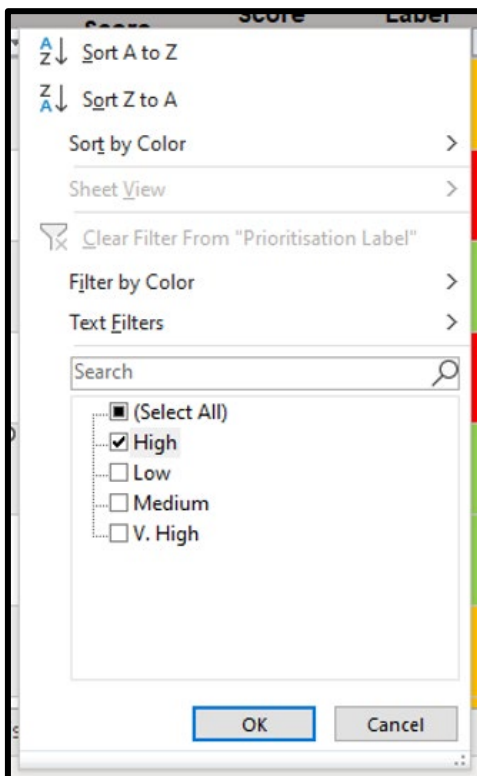
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**How to filter your waiting list:**

To filter the waiting list, click on the arrow in the corner of any category on the top row. See picture below. You can filter by of the columns, and you can filter by more than two categories, for example, filter by Referral Date and Priority Label.



To filter, select the column by which you want to filter the data. For example, if you wanted to filter the data to show you how many High cases are on your waiting list, you can do so by filtering the Prioritisation Label column.



Once filtered, you can then analyse your waiting list. For example, you can look at your list of “High” cases still awaiting allocation, and compare today’s date, with the “High Risk Allocation Deadline”.

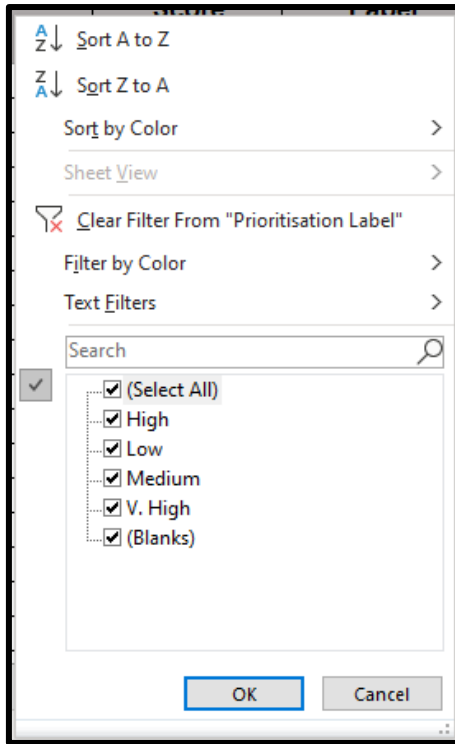
For example, in the snapshot below, although all the cases have a prioritisation label of “High”, you might consider allocating the one which has the “High Risk Allocation Deadline” that approaches first (or may have already passed).

In addition, by filtering this way with all levels of priority, you can allocate them in date order regardless of the priority label (to reduce the potential that low cases continue to wait longer and longer).

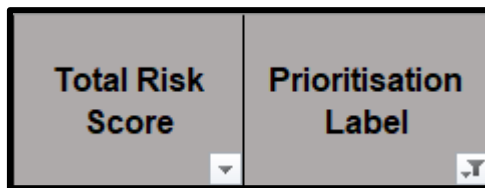
Worker Type	Referral Date	High Risk Allocation Deadline	Medium Risk Allocation Deadline	Low Risk Allocation Deadline	Risk Impact Score	Risk Frequency Score	Total Risk Score	Prioritisation Label
SCP	13/02/23	27/02/23	13/03/23	27/03/23	4	4	16	High
SCP	17/02/23	03/03/23	17/03/23	31/03/23	3	3	9	High
SW	21/02/23	07/03/23	21/03/23	04/04/23	3	2	6	High
SW	22/02/23	08/03/23	22/03/23	05/04/23	3	3	9	High
SW	22/02/23	08/03/23	22/03/23	05/04/23	3	3	9	High

You can also filter by more than one column, for example, once you’ve filtered by Prioritisation Label, you might want to filter by Referral Type or Worker Type. In that case, you just repeat the filter process with that column.

You must remember to take off the filters. To do this, **go to every column that you've filtered**, and just "select all"



If you're ever unsure if a filter is on, the drop down at the top of each column is different if filtered. Below is an example – the left column is not filtered, the right one is.



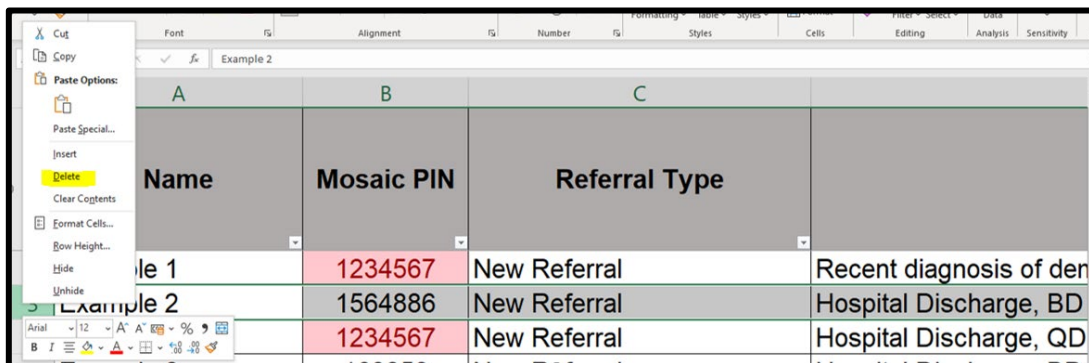
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### How to delete a row:

Once a case is allocated, it is no longer on the waiting list, and therefore the row can be deleted.

Please delete the row as a whole, **not the individual cells** (this again minimises the chance of the formulas being accidentally broken)

To do this, on the left-hand side of the spreadsheet, right click the row number – this will highlight the entire row and bring up a menu (see below):



You can tell the row is highlighted as it will show as grey, and if you click delete, the entire row will be deleted.

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## Key Things to Remember:

1. The spread sheet is built to make it as easy to use as possible – although it might feel arduous at first, with practice and regular use, these instructions will become obsolete because it will become second nature.
2. If the PIN is highlighted red (see below), this means that PIN is duplicated somewhere. If you press Ctrl + F a box will come up. You can search the PIN and see where it appears. It might be you have two referrals for a person and you can close one or combine the two. Either way, you can potentially delete one off the waiting list. (For example, a referral came in for a new assessment, the person is hospitalised before its allocated and they are discharged with a new service, therefore there are two referrals on the waiting list – one of which can be potentially deleted off the list and closed on mosaic).

Name	Mosaic PIN	Referral Type	Details
Example 1	1234567	New Referral	Recent diagnosis of dementia, Carer Stress
Example 2	1564886	New Referral	Hospital Discharge, BD calls with Harmony
Example 5	1234567	New Referral	Hospital Discharge, QDS Calls with My Homecare

3. The risk prioritisation deadlines, as well as the risk prioritisation label are **automatically generated. Do not delete the formulas/data in those cells.**
4. There are now the following columns:
  - “Area” – this is manual input. Some teams may not need to use this, in which case you can ignore it/leave it blank. However, it’s available for teams that may allocate based on area (i.e. North and South)
  - “Date of Last Contact” and “Date Next Contact Due”– the Date of Last Contact/Next Contact Due columns are **manual** – workers need to put in the date the person was last contacted, and when the next contact is due (based on discussion with the client/family). **If the client does not want regular contact, just leave both these columns blank.**
  - “Contact Overdue?” – this is an automatic column. It will be blank until the “Date of Next Contact Due” becomes out of date. When this happens, it will highlight blue and say “Contact Overdue”. Duty workers can then filter by “Contact Overdue” to easily show which clients require contact.
  - “Waiting Time (Days)” – this is auto generated based on the referral date. It will tell you at a glance how long that person has been awaiting allocation.

If you have any issues that aren’t covered, please contact Sophie Stockton ([Sophie.Stockton2@derbyshire.gov.uk](mailto:Sophie.Stockton2@derbyshire.gov.uk)) on teams or email for support.

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