

# Notes on Home Visit and Caseload Tracking Form version 10-09-2007

Changes have been made to the Home Visit and Caseload Tracking Form based on feedback from the field service workers. Specifically:

1. Some forms were not calculating correctly when apparently empty cells actually contained spaces (like one sees between words), and when extra spaces came before or after otherwise valid entries in the "Level of Service" columns.
2. Some forms were not calculating correctly because the worksheet protection was being removed and vital lines of formulas were deleted. The worksheet protection now has a password. Please note that you can delete families from the non-protected cells (e.g., the ones where you enter text) but if you try to select the entire row (with the auto-calculated fields) you will not be able to delete those.
3. It is our understanding that the worksheet protection was being removed so that the families could be sorted or re-ordered, so we have set up this spreadsheet to allow the sorting function to operate, however, this only works if you are using Excel 2002 or more recent versions. If you are using Excel 2000, the only way to re-order the rows is to copy and paste cells to different rows.

## ***Instructions for sorting rows***

Note: This applies only to Excel 2002 through 2007. Because the worksheet is protected, sorting must be done in a specific way. To sort, you must select the range of cells you would like to sort, not entire rows. For example, if you want to sort rows 8 through 15, select cells A1 through O15; don't select entire rows using the row numbers on the far left or Excel will not let you sort. Then click on the sort button, or go to Data|Sort in the menu.

	Family Initials (optional)	Family ID (required)	Family on Creative Outreach ONLY? Y or N	First Level of Service	Weeks on this Level	Total Visits Expected at this Level	Visits Completed at this Level	Second Level of Service	Weeks on this Level	Total Visits Expected at this Level	Visits Completed at this Level	Third Level of Service	Weeks on This Level	Total Visits Expected at this Level	Visits Completed at this Level
7															
8	Test1	20	N	1	3	3	2	2	1	0	1				
9	Test2	10	N	1	2	2	0	x	2	0	1				
10															
11															

Figure 1: Correct way to select a range for sorting. Note that the cells selected stop at the blue area.



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7																
8	Test1	20	N	1	3	3	2	2	1	0	1					
9	Test2	10	N	1	2	2	0	x	2	0	1					
10																
11																



**Figure 2: Wrong way to select rows for sorting. You can tell the entire row is selected because the selection goes beyond the blue area.**

Thanks for your feedback on the form, and for your continued good will as we “get the bugs out” to make the form as easy to use as possible. As always, if you have questions or concerns, feel free to contact us at [healthystart@npcresearch.com](mailto:healthystart@npcresearch.com).

The NPC Evaluation Team