

Referrals Extract Instructions and Tips

This report includes all Central Intake and Early Intervention referrals that occurred in the user-specified timeframe, along with all associated referral information.

Run and save the report

Navigate to the **Referrals Extract Report** on the **Reports** tab. Enter the desired date range and select the county. Then press “Generate CSV.”

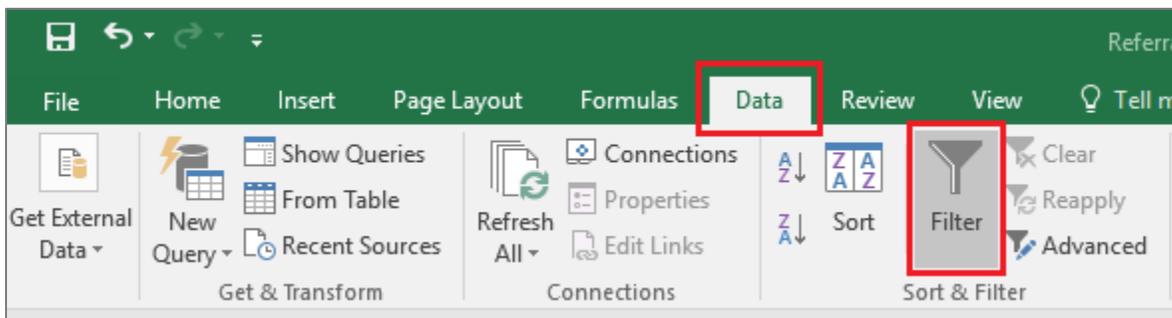
Referral Start Date	01/01/2019	
Referral End Date	03/31/2019	
County	BEIS Test County	▼
Generate CSV		

The default file format is CSV. In order to be able to utilize all functionality, save the file as an Excel file. To do so, click “Save As” and select the desired location. Type in the file name and select “Excel Workbook” in the “Save as type” field. Then press “Save.”

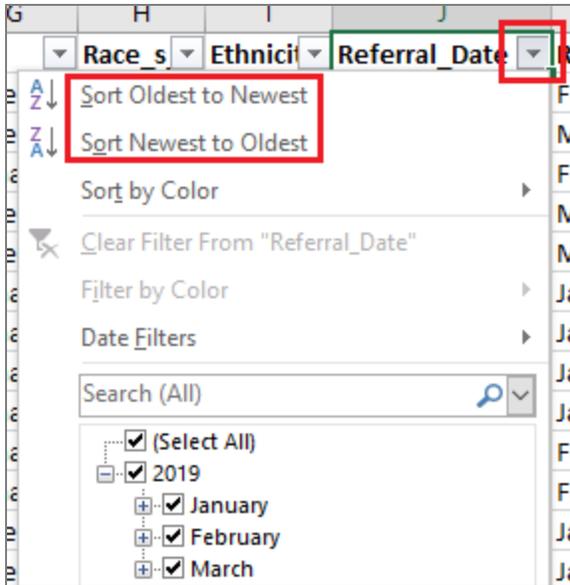
File name:	Referrals 1.1.19 to 3.31.19
Save as type:	Excel Workbook

Sorting and Filtering

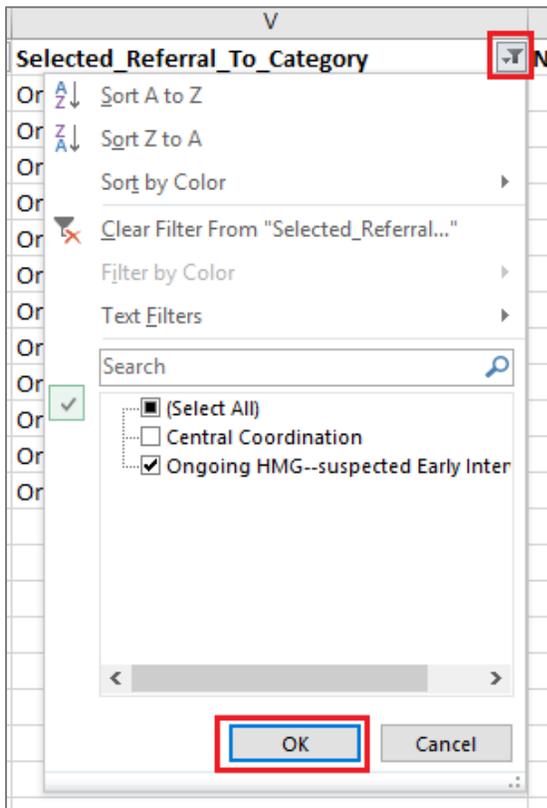
To utilize filters, first highlight the top row of the file that includes the field names. Then, navigate to the “Data” tab at the top of the file, then to the “Sort & Filter Section” and select “Filter.”



Click on the filter button in any column to sort or filter data as desired. For example, to sort the file so that data are in order based on when referrals were made, navigate to the “Referral_Date” column, click on the filter button, and select “Sort Oldest to Newest” or “Sort Newest to Oldest.”



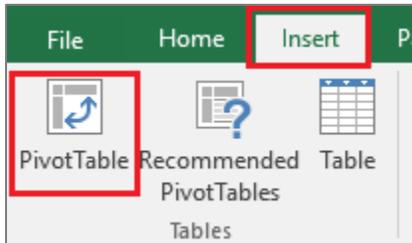
Data can also be filtered to only display selected information. For example, to select EI referrals only, navigate to the “Selected_Referral_To_Category” field, and click on the filter button. Select the desired categories, then click “OK.”



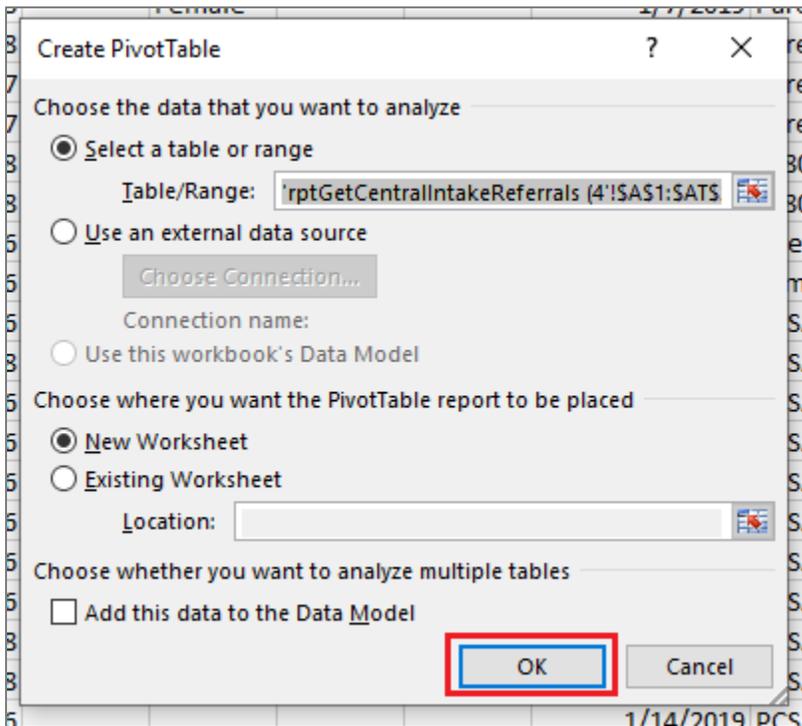
To utilize only a subset of the data, use filters to select the desired data, then copy and paste the data into a different tab. Alternatively, use filters to select unneeded data, delete the rows, then remove the filter to view desired data.

Pivot Tables

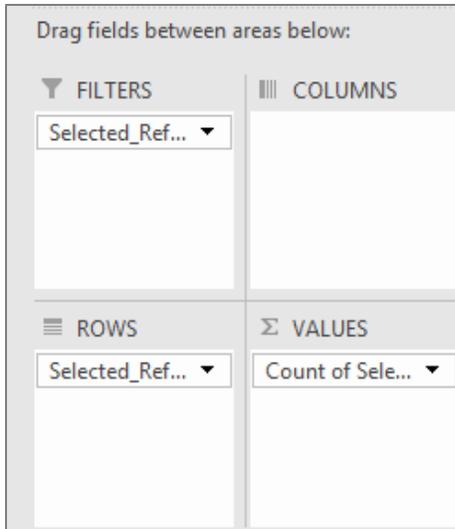
Pivot tables are a useful tool to quickly see a breakdown of data or to utilize filters without deleting information out of the file. Navigate to the “Insert” tab and then select “Pivot Table” in the “Tables” section.



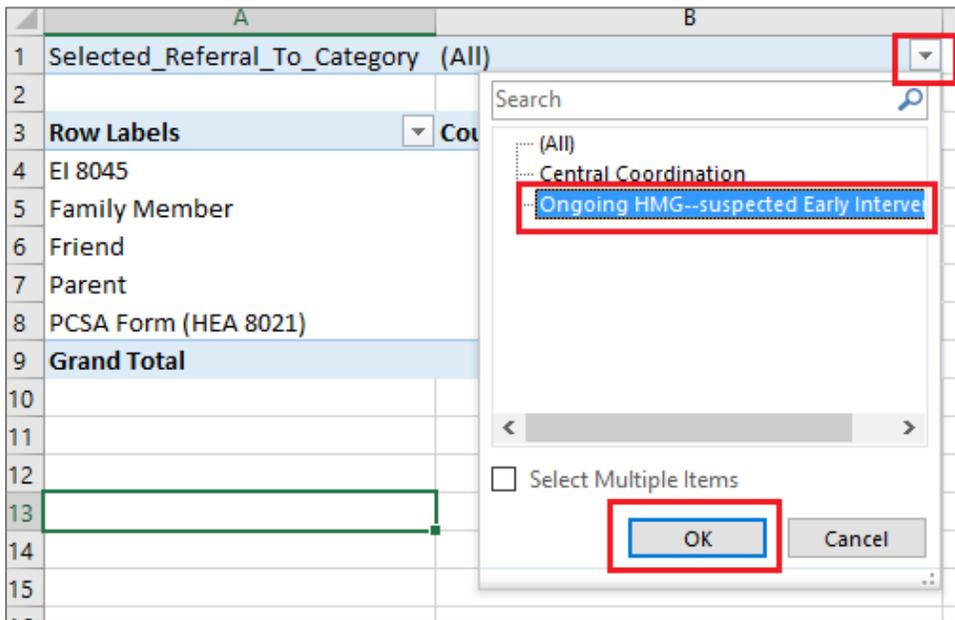
A box will pop up with options for creating the pivot table. The default table range should cover all the data in the file. Select whether the table is placed in a new worksheet or the current worksheet, then press “OK.”



Drag fields of interest to the appropriate box below the pivot table fields. For example, to see how many EI referrals came from each referral source, drag the “Selected_Referral_To_Category” field to the “FILTERS” box and the “Selected_Referral_Source_Type” field to the “ROWS” and “VALUES” boxes.



On the pivot table, navigate to the filter button on the “Selected_Referral_to_Category” and Select “Ongoing HMG—suspected Early Intervention.”



The table then displays the number of EI referrals that came from each referral source type.

	A	B
1	Selected_Referral_To_Category	Ongoing HMG--suspected Early Intervention ▼
2		
3	Row Labels	Count of Selected_Referral_Source_Type
4	EI 8045	1
5	Parent	3
6	PCSA Form (HEA 8021)	8
7	Grand Total	12
8		

Additional Calculations

The following are examples of additional information that can be obtained from this report.

Referral Month

In order to be able to quickly determine how many or what types of referrals were received each month, add a field to specify the referral month. To do so, insert a column to the right of the "Referral_Date" field and name it "Referral Month." Type the following formula in the second row of the "Referral Month" column (K2): `=TEXT(J2, "mmmm yyyy")` then press Enter. In this example, J2 references the **Referral Date** and K2 references the **Referral Month** being calculated. If using this formula to add data to the new field, ensure the cell referenced is in the **Referral Date** column.

J	K
Referral Date	Referral Month
2/21/2019	=TEXT(J2, "mmmm yyyy")

Double click in the bottom right corner of K2 to autofill the formula through the entire column. Copy the entire column and paste as values (leaving the formulas in the file can create issues if subsequently sorting, filtering, etc.). Use sorting, filtering, or pivot tables to obtain the desired data regarding referral month.

Age (in months) at Referral

Use the **date difference** formula to determine a child's age in months at referral. First, insert a new column and add a field header. In the second row, type `=DATEDIF(E2,J2, "m")`, where E2 refers to child's birth date and J2 refers to the referral date, then press Enter. Be sure that the formula references the correct columns. If the cell format defaults to a date, use cell formatting to re-format the entire column as numbers.

E	F	G	H	I	J	K
Birth Date	Due Date	Sex	Race_s	Ethnicity	Referral Date	Age (in months) at Referral
5/11/2016	5/13/2016	Male			2/21/2019	=DATEDIF(E2,J2, "m")

Double click in the bottom right corner of K2 (where K2 is the column used to calculate age at referral) to autofill the formula through the entire column. Copy the entire column and paste as values. Use sorting, filtering, or pivot tables to obtain the desired data regarding exit month.

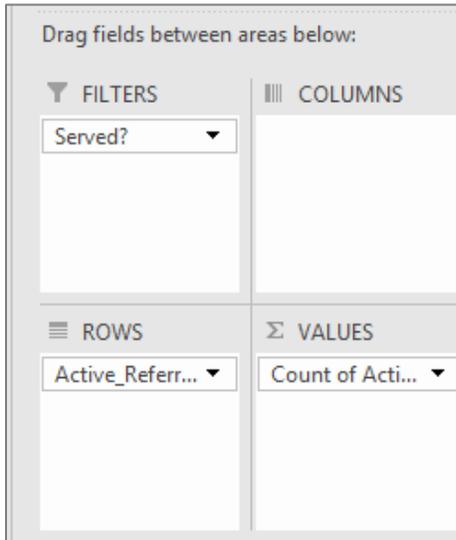
Referral Outcomes

To get an idea of how many and what types of referrals are resulting in the child being served, add a field to indicate whether the child had at least one IFSP. To do so, insert a column to the right of the "Active_Referral_Period_IFSP_Date" column and title it "Served?" In the second row, type `=IF(AQ2="", "No", "Yes")`, where AQ2 references the initial IFSP date after the referral.

AQ	AR
Active_Referral_Period_IFSP_Date	Served?
	=IF(AQ2="", "No", "Yes")

Note: Determining referral outcomes is only relevant for EI referrals. Keep this in mind and use filters in the dataset or pivot tables to select only EI data when making any calculations regarding referral outcomes.

To look at exit reasons of children who were referred to EI, but did not go on to be served, insert a pivot table. Drag the “Served?” field to the “FILTERS” box and the “Active_Referral_Period_Exit_Reason” field to the “ROWS” and “VALUES” boxes.



Navigate to the “Served?” filter on the pivot table and select “No.” The pivot table will then display exit reasons for children whose referral did not result in the child being served.

Served?	No
Row Labels	Count of Active_Referral_Period_Exit_Reason
All applicable program referrals made	711
Attempts to contact unsuccessful	65
Child/Family not eligible	16
Child/Family not in need of services	27
Family moved out of contractor's geography within state	2
Family no longer interested	49
Family not interested in ongoing HMG Services	89
Family refused program requirements	1
Referral to other community program	4
Referred to Help Me Grow less than 45 days prior to 3rd birthday	1
Unable to contact family	24
Grand Total	989



Need Additional Resources or Assistance?

See the more comprehensive “Using Data in Excel” document for instructions on how to perform many other functions in Excel. If you have specific questions regarding how to obtain needed information from this or any report, email eids@dodd.ohio.gov at any time.