

# How to Apply Conditional Formatting to Dates within 6 Months in Excel

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In modern data management, the ability to quickly visualize time-sensitive information is paramount. Whether you are tracking deadlines, monitoring inventory expiration, or managing employee milestones, identifying dates that fall within a crucial upcoming window--such as the next six months--can significantly enhance proactive decision-making. Excel, the industry standard for spreadsheet management, provides powerful tools to achieve this through its Conditional Formatting feature. This functionality moves beyond simple data storage, transforming raw dates into actionable insights by automatically highlighting cells that meet specific temporal criteria.

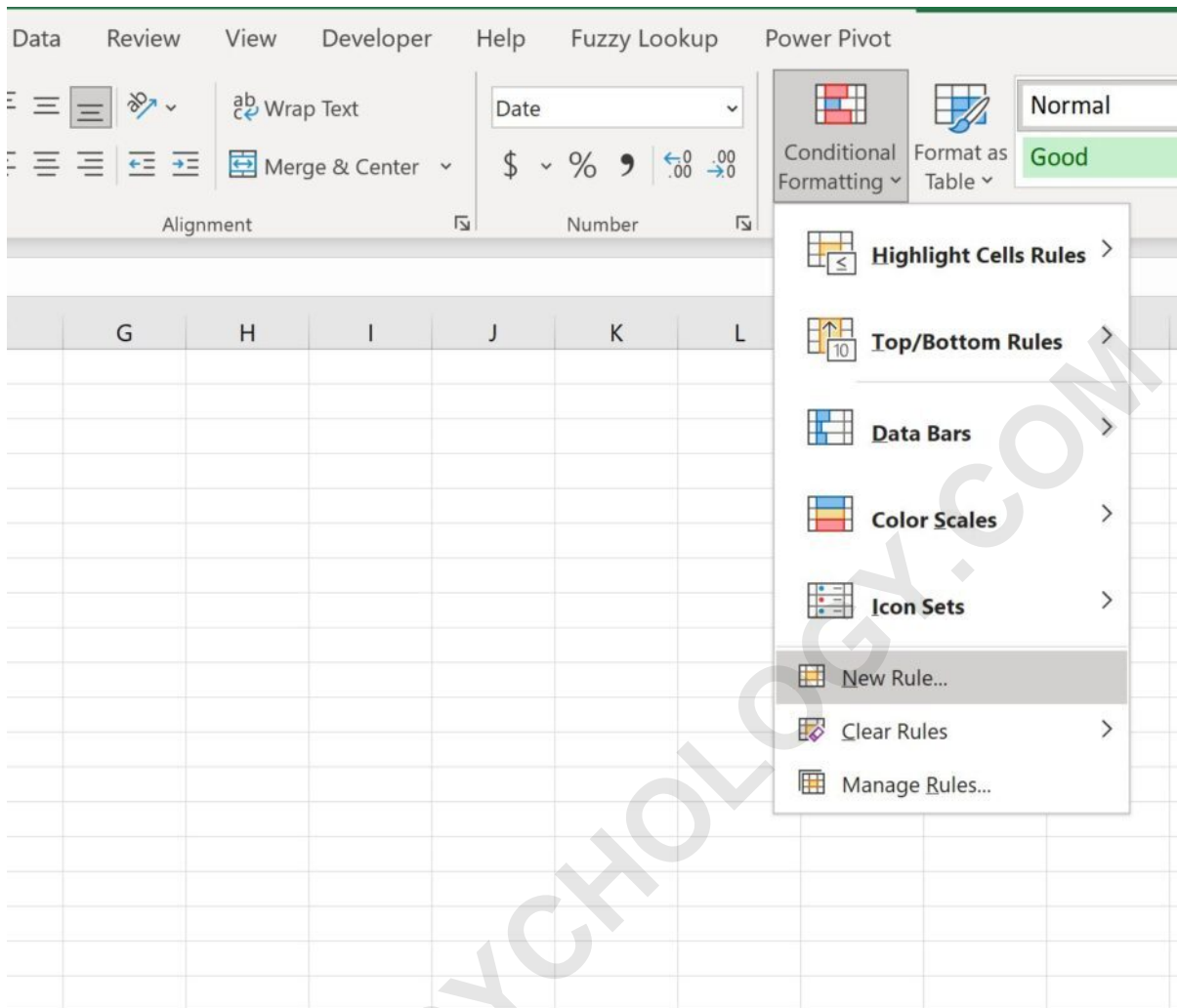
This comprehensive guide is designed to walk you through the precise mechanics of applying conditional formatting specifically to highlight dates that fall within a six-month window relative to the current date. We will delve into the necessary custom formulas, utilizing functions like TODAY and DATEDIF, to create a dynamic rule that updates every time the spreadsheet is opened. Mastering this technique is essential for analysts, project managers, and anyone relying on Excel for dynamic date tracking, ensuring that critical milestones never go unnoticed.

## Setting the Foundation for Dynamic Date Tracking

The foundation of this solution lies in creating a custom formula rule within the Conditional Formatting manager. Unlike preset rules that handle basic comparisons (like "Greater Than" or "Between"), a custom formula allows us to use sophisticated functions to calculate the time difference between the date in question and the present moment. This is essential because the timeframe is relative and constantly changing, demanding a dynamic calculation rather than a static reference point.

To begin the process of dynamic date tracking, we must first navigate to the appropriate menu within Excel. To apply conditional formatting to cells that have a date within 6 months of the current date in Excel, you can use the **New Rule** option under the **Conditional Formatting** dropdown menu within the **Home** tab. Accessing this rule creation interface is the crucial first step toward instructing Excel how to evaluate each cell based on our specific temporal requirement, establishing a visual alert system for impending deadlines or events.

This approach ensures that the formatting is not permanent but rather updates automatically whenever the file is opened or recalculated, providing an always up-to-date view of which dates are entering the critical six-month window. We utilize the **New Rule** functionality specifically because our criteria cannot be met by standard date presets, necessitating the power of a customized logical test driven by an internal calculation engine.



The following example shows how to use this option in practice. We will work through a practical scenario involving retirement dates to illustrate exactly how the combination of highlighting, rule creation, and formula application works seamlessly to deliver instant visual feedback to the user.

## Key Functions for Dynamic Date Comparison

Before implementing the rule, it is critical to understand the two core functions that make this dynamic formatting possible: TODAY and DATEDIF. The TODAY function, which requires no arguments (written simply as `=TODAY()`), returns the current date of the system clock. This function is vital because it provides the ever-changing baseline reference point against which all other dates in your dataset will be measured, guaranteeing the rule remains relevant day after day.

The second, and perhaps more complex, function is DATEDIF (Date Difference). While not always displayed in Excel's function library, it is an extremely powerful tool designed specifically for calculating the number of days, months, or years between two dates. Its syntax requires three

arguments: the start date, the end date, and the interval unit specified in quotation marks (e.g., "m" for months, "y" for years, "d" for days). This function allows us to extract the precise number of months separating the current date from the target date within the spreadsheet.

By combining these two functions, we create a logical test that evaluates to either **TRUE** or **FALSE** for every cell in the selected range. If the formula returns **TRUE**, the formatting is applied; if it returns **FALSE**, the cell remains unformatted. The efficiency of this method lies in its ability to perform advanced temporal subtraction and comparison directly within the Conditional Formatting environment, achieving the goal without requiring any helper columns or manual date calculations.

## Demonstrative Scenario - Tracking Retirement Dates

Suppose we have the following dataset in Excel that shows the date that various people will retire from working: This scenario is a classic example of needing proactive alerts, where knowing who is retiring soon allows management or HR to initiate necessary transition procedures well in advance. The dates provided are static, but their relevance is dynamic, shifting daily as the current date progresses.

	A	B	C	D	E
1	<b>Name</b>	<b>Retirement Date</b>			
2	Andy	7/30/2023			
3	Bob	8/15/2023			
4	Chad	10/19/2023			
5	Doug	10/22/2023			
6	Eric	1/4/2026			
7	Frank	1/19/2027			
8	Greg	12/12/2023			
9	Henry	1/5/2029			
10	Isaac	6/15/2034			
11	John	6/12/2024			
12	Kendall	1/1/2024			
13	Luke	1/17/2025			
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For the purpose of this demonstration, we must establish a fixed reference point for the calculation. This article is being written on **7/28/2023**. All subsequent calculations within this example will use

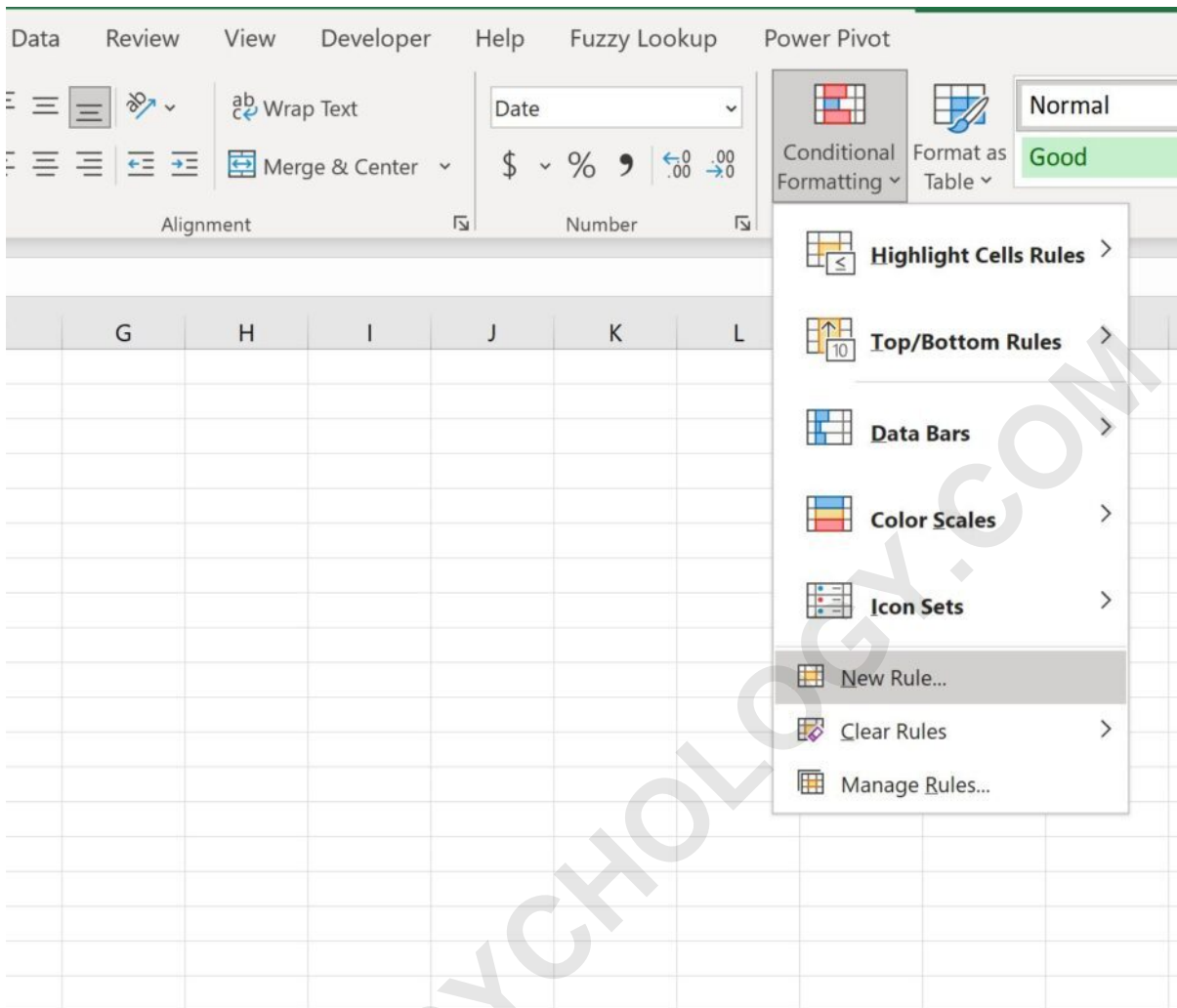
this date as the current date for evaluation. However, remember that when you implement this in your own workbook, the TODAY function will automatically adjust to the actual date you open the file.

Suppose we would like to apply conditional formatting to any date that is within 6 months of today. This means any retirement date that falls between 7/28/2023 and 1/28/2024 should be visually marked. We are focusing on future dates, calculating the difference between the current date (Start Date) and the retirement date (End Date) in terms of whole months.

### Detailed Procedure for Creating the New Rule

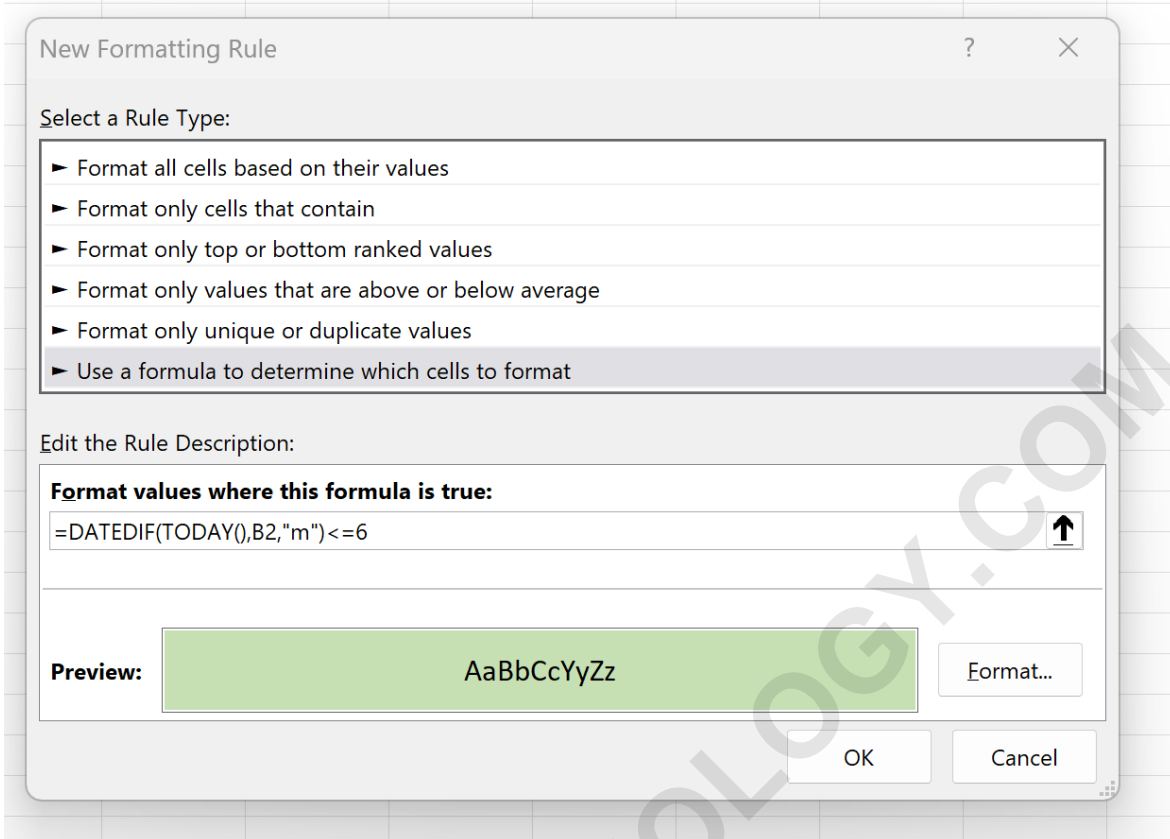
The procedural steps for applying this advanced Conditional Formatting rule must be followed precisely to ensure the formula applies correctly to the entire range. The first and most critical step is ensuring the correct range of cells is selected before opening the rule manager, as this selection dictates where the rule will be tested and applied.

To do so, we can highlight the cells in the range **B2:B13**, then click the **Conditional Formatting** dropdown menu on the **Home** tab and then click **New Rule**: Highlighting the entire range first allows Excel to understand the scope of the rule. When writing the formula inside the rule manager, we will only refer to the topmost cell of the selected range (cell B2 in this case), and Excel will automatically adjust that reference relative to every other cell in the selection.



After clicking **New Rule**, the New Formatting Rule dialogue box will appear. Within this dialogue box, you must choose the rule type that permits formula entry. In the new window that appears, click **Use a formula to determine which cells to format**, then type **=DATEDIF(TODAY(),B2,"m")<=6** in the box. This specific formula is the engine of the entire operation, dynamically calculating the number of months remaining until the retirement date.

Once the formula is entered, the final step involves defining the visual output. Click the **Format** button and choose a fill color to use. This opens the Format Cells dialogue box, where you can customize the formatting extensively, including font, border, and, most commonly, the cell fill color. Selecting a bright, contrasting color is recommended to ensure the highlighted dates immediately stand out to the user, fulfilling the primary goal of proactive visualization.



## Decoding the DATEDIF Formula Logic

Understanding the logic of the custom formula is essential for troubleshooting and future adaptation. The formula used is `=DATEDIF(TODAY(),B2,\"m\")<=6`. This statement is a single logical test designed to return **TRUE** if the condition is met and **FALSE** if it is not. Breaking down the components provides clarity on how the six-month window is established dynamically.

The first part, `DATEDIF(TODAY(),B2,\"m\")`, calculates the difference in whole months between the current system date (provided by the TODAY function) and the date stored in cell B2. The unit "m" ensures the result is expressed as an integer representing the completed months between the two dates. Crucially, B2 is used without absolute references (no dollar signs, e.g., `$B$2`), ensuring that as the rule is applied down the range B2:B13, the cell reference correctly adjusts to B3, B4, and so on.

The second part, `<=6`, is the comparative operator. This condition checks if the resulting number of months calculated by the DATEDIF function is less than or equal to six. If the date in B2 is six months or fewer away from today's date, the entire formula evaluates to **TRUE**, triggering the conditional formatting. If the difference is 7 months or more, the formula returns **FALSE**, and no formatting is applied.

It is important to note that the DATEDIF function is designed to calculate the time difference inclusively, meaning it accurately measures the interval between the two dates, providing a robust measurement for time-based thresholds in data validation and visualization.

## Reviewing the Visual Outcome

After clicking OK in both the Format Cells and New Formatting Rule dialogue boxes, the conditional formatting rule is instantly applied to the selected dataset. This immediate visual feedback confirms the success of the formula application and allows for immediate identification of critical dates that meet the six-month threshold.

Once we press **OK**, all of the cells in the range **B2:B13** that have a date within 6 months of **7/28/2023** will be highlighted: Based on the reference date of 7/28/2023, dates like 10/1/2023 or 12/15/2023 will be highlighted, while dates further out, such as 3/1/2024 or 5/1/2024, will remain unformatted. This stark visual differentiation is the ultimate output of the entire process, effectively transforming a static list of dates into a dynamic, prioritized timeline.

	A	B	C	D	E
1	<b>Name</b>	<b>Retirement Date</b>			
2	Andy	7/30/2023			
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4	Chad	10/19/2023			
5	Doug	10/22/2023			
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The formatted cells instantly draw attention, allowing stakeholders to focus their efforts on those individuals whose retirement dates are approaching rapidly. This visual prioritization is crucial in

complex spreadsheets containing hundreds or thousands of rows of data, where manually scanning dates for proximity would be inefficient and prone to error. The conditional formatting feature thus serves as an automated alerting system, maximizing efficiency in data review.

## Customizing the Time Frame and Rule Adjustments

The power of using a custom formula lies in its flexibility; the threshold of six months is easily adjustable based on changing business needs or project requirements. Modifying the timeframe requires only a minor edit to the existing rule, eliminating the need to recreate the entire formatting process from scratch, which saves considerable time and effort.

If you would like to change the formula to highlight cells within a different number of months of the current, simply change the last number in the formula in the formatting rule box. To edit the rule, return to the **Conditional Formatting** dropdown menu on the Home tab, click **Manage Rules**, select the existing rule, and click **Edit Rule**. This interface provides direct access to the formula field where the adjustment is made.

For example, you could type `=DATEDIF(TODAY(),B2,"m")<=3` in the conditional formatting rule box to instead highlight cells that have a date within 3 months of the current date. This change immediately tightens the focus, highlighting only the most imminent dates. Conversely, changing the value to `<=12` would expand the scope to highlight dates within the next full year. This adaptability makes the custom formula method superior to static date ranges or simpler built-in formatting options.

**Note:** We chose to use a light green fill for the conditional formatting in this example, but you can choose any color and style you'd like for the conditional formatting. Beyond fill color, you can apply custom font colors (such as red for critical items), bolding, or even specific borders to ensure the visual cue aligns perfectly with your organization's reporting standards and hierarchy of urgency. Effective visual design enhances the overall readability and utility of the dynamic report.

In conclusion, harnessing the capabilities of Excel's custom conditional formatting, specifically through the strategic application of the DATEDIF function coupled with TODAY, provides a robust and dynamic method for tracking time-sensitive data. This technique ensures that crucial time thresholds, such as a six-month window, are instantly visualized and managed effectively, transforming static spreadsheets into powerful, adaptive decision-making tools.