



Insights for Healthcare

Microsoft Excel® v2016 PivotTable Training Version 1

May 27, 2022



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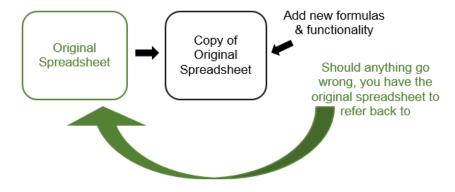


SECTION 1 Introduction To PivotTable Reporting

The following training materials are provided to assist with analysis and reporting using the data output from the DataGen[®] planning application.

All of the examples herein use **Microsoft Excel® v2016**. Depending on your installed version of Microsoft Excel the screenshots used in the illustrations **may not match exactly what you see on your screen**. However, **the functionality will be similar**. **The content used in all examples is not real patient data and is intended for teaching purposes only**.

Please always <u>back up your work</u> and <u>save often</u>. A good best practice when attempting any new functionality is to create a copy of the original spreadsheet and implement your changes on the copied spreadsheet. Should anything go wrong, you can refer back to the original spreadsheet. See the diagram below.



What Are PivotTables?

PivotTable is a feature within Microsoft Excel that takes individual cells or pieces of data and lets you arrange them into numerous types of calculated views. These snapshots of summarized data require minimal effort to create and can be changed by simply clicking or dragging fields within your report.

By using built-in functions and filters, PivotTables allow you to quickly organize and summarize large amounts of data. You can filter and drill down for more detailed examination of your numbers and various types of analysis may be completed without the need to manually enter formulas into the spreadsheet you're analyzing.



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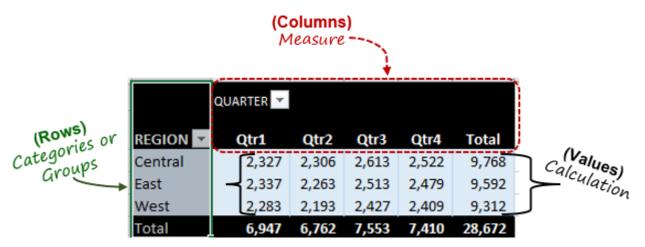
Pivot Table Report Views

Detailed Spreadsheet Data

What Are The Main Parts Of A PivotTable?

There are three main components of a PivotTable:

- 1. **Rows:** The rows section typically represents how you would like to <u>categorize</u> or <u>group</u> your data. Examples include: employee name, region, department, part number, item, etc.
- 2. **Columns:** The columns show the <u>measure</u> in which you're displaying your calculations; often a *time period* such as a month, quarter or year, but may also be categories, product lines, etc.
- 3. Values: Values are the calculation portion of the report, these figures can be sums, percentages, counts, averages, rankings or custom computations.





Preparing The Worksheet For Reporting

To use PivotTables, the information must be in an Excel spreadsheet. If the data are in a **.CSV** structure they must be converted; this conversion process is reviewed in the <u>next section</u>. The worksheet must also be *formatted* in a way compatible with PivotTables, meaning:

- Your dataset should not contain blank rows, columns, subtotals or footers.
- No cells (columns) should be merged.
- Each column heading should have a **unique name**.

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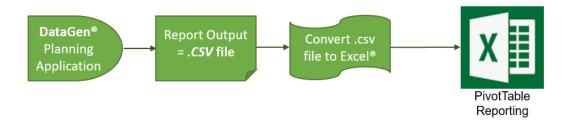
SECTION 2 Importing .CSV Files (Part 1)

Report Output From The DataGen Planning Application

Like many tasks in Excel, file importing and parsing may be accomplished in multiple ways. In these training materials we illustrate two options for importing .CSV files into Excel.

- A. The first is simply opening the .CSV file and saving it as an Excel spreadsheet. This is the most efficient approach if you need to analyze information quickly and do not intend to share your results with others.
- B. If your reporting is recurring, such as daily, weekly or monthly, then importing the .CSV data directly into the PivotTable is preferred, as this method allows you to keep your existing PivotTable(s), including formatting, and add new data by using the **Refresh** feature.

We'll review option A first and B in Section 6.



EXAMPLE:

Convert a .CSV file into an Excel spreadsheet by using the Save as type method.

SAMPLE DATA:

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5	2776092	2020	9	3	30	Grand Plai	Kansas	NY	15	Medicare	8	5
6	216227	2018	6	2	25	Ruby Valle	Virginia Be	NY	2	Insurance	21	
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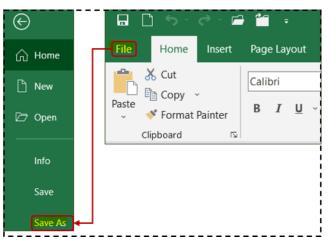


STEPS TO COMPLETE EXAMPLE:

1. Open the .CSV file; note the Type is Microsoft Excel Comma Separated Values File.



2. From the ribbon select **File : Save As**.



- 3. When prompted, select a file location.
- 4. Click the drop-down arrow for **Save as type**.
- 5. From the drop-down menu select **Excel Workbook (*.xlsx)**.
- 6. Click the Save button.



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SECTION 3

Basic PivotTable Reporting and Formatting

Once we have the data prepared in Excel, we may begin developing our PivotTable reports. We'll start with analyzing the data at a macro level.

What IS The Total Number Of Claims By Year?

EXAMPLE:

Create a PivotTable report displaying each year with the total number of claims.

SAMPLE DATA:

Fields used in this exercise:

- a. Claim_ID
- b. Visit_Year

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2	4725043		5	2	62 Tulip General Hospital	Garland	NY	Unknown	57 55-59
3	1692982	2020	9	3	47 Westview Hospital Center	Houston	NY	Unknown	51 50-54
4	2122703		11	4	3 Clearwater Valley General Hospital	Aurora	NY	Other Spanish/Hispanic Origin	30 30-34
5	2776092	2020	9	3	30 Grand Plains Medical Clinic	Kansas	NY	Puerto Rican	55 55-59
6	216227	2018	6	2	25 Ruby Valley Community Hospital	Virginia Beach	NY	Cuban Origin	48 45-49
7	216243	2019	2	1	10 Kindred Soul Hospital Center	Columbus	NY	Mexican Mexican American Chicano/a	a 49 45-49
8	216274	2019	5	2	41 Grand River Hospital Center	Anaheim	NY	Spanish/Hispanic Origin	22 22-24
9	3069154	2020	1	1	42 Pinevalley Medical Clinic	Tampa	NY		65 65-69
10	209790	2019	12	4	10 Kindred Soul Hospital Center	Fresno	NY	Multi-ethnic	25 25-29
11	209793	2019	3	1	55 Summerfield General Hospital	Austin	NY	Not of Spanish/Hispanic Origin	22 22-24
12	3069448	2020	2	1	56 Peak View Medical Clinic	Richmond	NY	Spanish/Hispanic Origin	47 45-49
13	210856	2019	12	4	59 Orange Garden Medical Center	Tulsa	NY		47 45-49
14	2122865	2020	6	2	2 Progress Community Hospital	Greensboro	NY	Spanish/Hispanic Origin	39 35-39
15	210899	2018	4	2	58 Hillsdale Hospital Center	St. Paul	NY	Unknown	65 65-69
16	201177	2018	3	1	46 Horizon Hospital	Fresno	NY	Puerto Rican	31 30-34
17	201182	2018	2	1	13 Cherry Blossom Community Hospita	l Colorado	NY	Multi-ethnic	58 55-59
18	201198	2018	3	1	48 Good Samaritan Hospital Center	Tampa	NY	Not of Spanish/Hispanic Origin	41 40-44
3739	5003931	2020	1	1	34 Stillwater Medical Center	Grand Rapids	NY	Other Spanish/Hispanic Origin	55 55-59
3740	5004087	2020	12	4	45 Rosewood Medical Center	Portland	NY	Unknown	46 45-49
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STEPS TO COMPLETE EXAMPLE:

To determine the **Total Count of Claims by Year**:

- 1. Open the Excel file containing the data for analysis.
- 2. Select all columns. In this demonstration, we'll be selecting columns A:Y.

 	Select columns A:Y (image truncated)							
	A 🗸	В	С	D	E	F	G	
1	Claim_ID	Visit_Year	Visit_Month	Visit_Quarter	Facility_ID	Facility	Facility_County	
2	4725043	2020	5	2	62	Tulip General Hospital	Garland	
3	1692982	2020	9	3	47	Westview Hospital Center	Houston	
4	2122703	2020	11	4	3	Clearwater Valley General Hospital	Aurora	

3. From the Ribbon select Insert : PivotTable : From Table/Range

Excel [®] version 2016	Excel [®] version 2013
File Home Insert Page Layout	FILE HOME INSERT PAGE LAYOUT FOR
PivotTable Becommended Table PivotTables From Lable/Range From External Data Source From Data Model	Pictures Online PivotTables Tables Tables

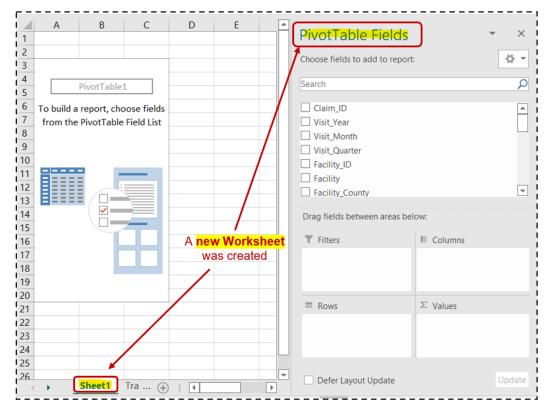
A similar dialogue box will appear. Note the **Data Range** and **location where the new PivotTable will be located**:

PivotTable from table or range	?	×
Select a table or range	Data Range	
<u>T</u> able/Range: Training!\$A:\$Y	4	1
Choose where you want the PivotTable to	be placed	
·	Location where the new PivotTable will be locate	
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Location:	Woll able will be locate	£ ∎
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Location:		1



4. Click OK.

A new tab will be created and appear similar to the following. Note the *PivotTable Fields* pane on the left side of the new worksheet.





Next, we'll categorize our report and select a calculation value.

- 5. In the **PivotTable Fields** *pane* select the following fields:
 - Visit_year (Rows section)
 - Claim_ID (Σ Values section)

1	A	В	(^	PivotTable Fields	×
2					-
3	Row Labels 👻	Sum of Claim_ID		Choose fields to add to report:	· · ·
4	2018	70134976824		Search	
5	2019	70273821156		Scarch	~
6	2020	69004750538		Claim_ID	
7	(blank)			Visit_Year Drag fields to the	
8	Grand Total	2.09414E+11		Visit_Month below areas	1
9				Visit_Quarter	1
10				Facility_ID	-
11					
12				Drag fields between areas below:	1
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Value Field Settings

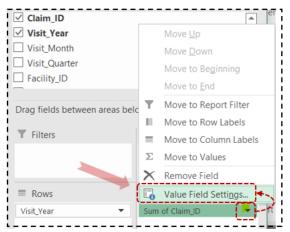
When we added the Claim_ID to the Σ Values section, Excel[®] is incorrectly reading this field as numeric and <u>summing</u> the records instead of <u>counting</u> them. To fix, we're going to select a new summarization type using the Value Field Settings... option.

Should be ' Count of Claim_ID'
Σ Values
Sum of Claim_ID 🔹



To change the Σ Values section from sum to count:

1. Click the **Sum of Claim_ID** drop-down arrow; then, from the sub-menu select **Value Field Settings...** option.



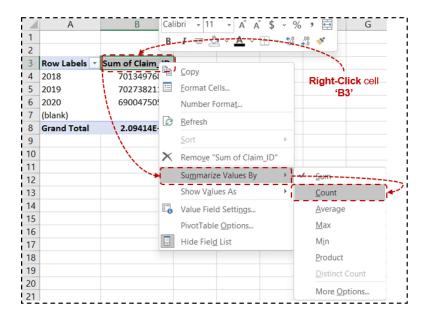
The following Value Field Settings... dialogue box will appear:

- 2. From the **Summarize value field by** list, select the **Count** option.
- 3. Click OK.

Value Field Set Source Name:	-				?	×	
<u>C</u> ustom Name:	Count of	f Claim_ID					
Summarize Va	lues By	Show Values As	5				
Summarize va	alue field	by					
Summarize value field by Choose the type of calculation that you want to use to summarize data from the selected field							
data from the			vant to use to	summar	ïze		
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data from the Sum Count Average			vant to use to	summar	ıze		
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Alternatively, you may *right-click* cell **B3** and from the sub-menu select **Summarize Values By** and then the **Count** option.



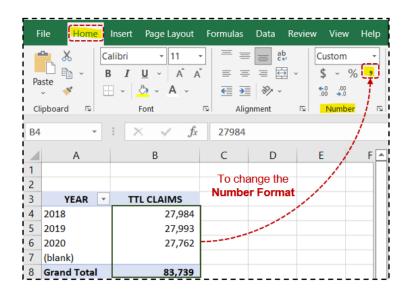
Changing Column AND Row Text LabELs

A PivotTable will be on the right side of your screen. <u>Note</u>: the format is difficult to read.

	А	В
1		
2		
3	Row Labels 🔻	Count of Claim_ID
4	2018	27984
5	2019	27993
6	2020	27762
7	(blank)	
8	Grand Total	83739



- 1. To change the column names and format of the numbers:
 - Select cell A3 and change the text from Row Labels to YEAR.
 - Select cell B3 and change the text from Count of Claim_ID to TTL CLAIMS.
 - You may also change the number format in cells B4:B8. In the below example, the format was changed to Comma Style with <u>zero</u> decimal places.



PivotTable Styles

To change the format (style) of a PivotTable:

- 1. Select cell A3 and from the PivotTable Tools: Design ribbon, select the PivotTable Styles dropdown arrow.
- 2. Select a style (format) of your liking.

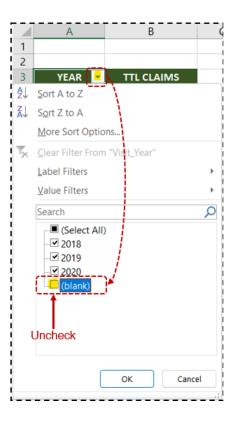
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	Layo	,	PivotT	able Style C	ptions				PivotTable	Styles			
A3	3 -	: 🗙 🗸 j	x YEAR										v
1 2 3	A YEAR 🗸	B TTL CLAIMS	С	D	E	F	(5 F 🔺	PivotTab	le Fields		•	×
4 5	2018 2019	27,984 27,993							Search				Q
6 7	2020 (blank)	27,762							 ✓ Claim_ID ✓ Visit_Year 				Â
8 9	Grand Total	83,739							Visit_Month				



Filtering Out Blank Rows AND Columns

Next, to further improve the readability of the report, we'll want to hide the **(blank)** row. To accomplish this, we'll simply filter out these blank records.

- 1. Click the YEAR (cell A3) drop-down arrow; then from the sub-menu uncheck the (blank) box.
- 2. Click OK.





SECTION 4 Extending Pivottable Functionality With Subtotals AND Filtering

In this section we'll demonstrate how to extend PivotTable functionality by adding subtotals and filters.

What Are The Total Claim Counts By Month, Quarter AND Year?

EXAMPLE:

Create a report displaying each month's total number of claims, subtotaled by quarter, with an annual grand total.

SAMPLE DATA:

Fields used in this exercise:

- a. Claim_ID
- b. Visit_Year
- c. Visit_Month
- d. Visit_Quarter

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1 2	Claim_ID 4725043	Visit_Year	Visit_Month V 5	isit_Quarter Fi		Facility Tulip General Ho	snital		Facility_County Garland	Facility_State	Payor_Ca	tegory_Co	de L
2 3	1692982	2020	9	3		Westview Hospit			Houston	NY			3
4	2122703	2020	11	4		Clearwater Valle		Hospital	Aurora	NY			1
5	2776092	2020	9	3		Grand Plains Med			Kansas	NY			15
6	216227	2018	6	2	25	Ruby Valley Com	munity Ho	spital	Virginia Beach	NY			2
7	216243	2019	2	1	10	Kindred Soul Hos	pital Cent	er	Columbus	NY			14
8	216274	2019	5	2	41	Grand River Hosp	oital Cente	r	Anaheim	NY			5
9	3069154	2020	1	1	42	Pinevalley Medic	al Clinic		Tampa	NY			4
0	209790	2019	12	4	10	Kindred Soul Hos	pital Cent	er	Fresno	NY			20
1	209793	2019	3	1	55	Summerfield Ger	neral Hosp	ital	Austin	NY			9
2	3069448	2020	2	1	56	Peak View Medic	al Clinic		Richmond	NY			6
3	210856	2019	12	4		Orange Garden N			Tulsa	NY			10
4	2122865	2020	6	2		Progress Commu		tal	Greensboro	NY			8
5	210899	2018	4	2		Hillsdale Hospita			St. Paul	NY			8
6	201177	2018	3	1		Horizon Hospital			Fresno	NY			20
7	201182	2018	2	1		Cherry Blossom (Colorado	NY			15
8	201198	2018	3	1	48	Good Samaritan	Hospital C		Tampa	NY			12
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STEPS TO COMPLETE EXAMPLE:

- 1. Open the Excel file containing the data for analysis.
- 2. Select all columns.
- 3. From the ribbon select Insert : PivotTable : From Table/Range.
- 4. Click OK.

A new tab will be created and appear similar to the following. We'll **categorize** our report and select a **calculation** value. **Note:** the <u>column order</u> must be Quarter first, followed by Month.

- 5. In the *PivotTable Fields pane* select the following fields:
 - Visit_Year (Rows section)
 - Visit_Quarter (Columns section)
 - Visit_Month (Columns section)
 - Claim_ID

 $(\Sigma \quad Values \quad section)$

1	A	В		С	D	E	F	G	Н	1	J	К	L	М	N	0	Р	Q	R	A	PivotTable	Fields		• ×
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2	YEAR 才 018	<u> </u>	2 270	2,358	3 267	7.103	4 2,263	2,286	3 204	6.053	7	3 395		7.021	10				27.094					_
	018	1	2,378 2,236	2,358	2,367 2,340	7,103 6,833	2,203	2,280	2,304 2,309	6,853 7,020	2,373 2,406	2,285	2,363 2,334	7,021	2,306 2,278	2,344 2,433	2,357 2,376	7,007	27,984 27,993		Claim_ID			
	019		2,230	2,237	2,340	6,925	2,400	2,305	2,309	6,984	2,323	2,313	2,334	6,847	2,278	2,435	2,376	7,007	27,993		Visit_Year			T
	irand Total		6,928	6,935	6,998	20,861	7,007	6,900	6,950	20,857	7,102	6,930	6.889	20,921	6,897	7,125	7,078		83,739		Visit_Month	Noto	the order of the	ho
			0,520	0,555	0,550	20,001	7,007	0,500	0,550	20,007	1,102	0,550	0,005	LOJULI	0,031	1,120	1,010	21,200	00,100		Visit_Quarter		& Month Colu	
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																							Visit_Quarter	
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																					Rows		Σ Values	
1																					Visit_Year	-	TTL CLAIMS	•
1																								
1.																								

- 6. Report formatting changes:
 - A. Cell **B3** text changed to **MONTH & QTR**.
 - B. Text prefix QTR added to each Quarter and bold font.
 - C. Thick border added after each Quarter.
 - D. Grand Total values formatted with **bold font**.
 - E. PivotTable Styles style changed to dark green.

2	В	С	D	Е	F	G	Н	1		ĸ	L	М	N	0	Р	Q	R
2	A			B													
3	MONTH & QTR 🔽			•													
4	■1			QTR 1	■2			QTR 2	≡ 3			QTR 3	■4			QTR 4	Grand Total
5	1	2	3		4	5	6		7	8	9		10	11	12		
6	2,378	2,358	2,367	7,103	2,263	2,286	2,304	6,853	2,373	2,285	2,363	7,021	2,306	2,344	2,357	7,007	27,984
7	2,236	2,257	2,340	6,833	2,406	2,305	2,309	7,020	2,406	2,313	2,334	7,053	2,278	2,433	2,376	7,087	27,993
8	2,314	2,320	2,291	6,925	2,338	2,309	2,337	6,984	2,323	2,332	2,192	6,847	2,313	2,348	2,345	7,006	27,762
9	6,928	6,935	6,998	20,861	7,007	6,900	6,950	20,857	7,102	6,930	6,889	20,921	6,897	7,125	7,078	21,100	83,739

Next, we'll review options for *filtering records* to allow for more detailed analysis.



How Do I Filter My Results By Facility and Year?

EXAMPLE:

Create a report allowing a user to review only claims related to a specific facility or facilities, by a single year.

SAMPLE DATA:

Fields used in this exercise:

- a. Claim_ID
- b. Visit_Year
- c. Facility

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	Α	В	С	D	E	F	G	Н
1	Claim_ID	Visit_Year	Visit_Month	Visit_Quarter	Facility_ID	Facility	Facility_County	Facility_State
2	4725043	2020	5	2	62	Tulip General Hospital	Garland	NY
3	1692982	2020	9	3	47	Westview Hospital Center	Houston	NY
4	2122703	2020	11	4	3	Clearwater Valley General Hospital	Aurora	NY
5	2776092	2020	9	3	30	Grand Plains Medical Clinic	Kansas	NY
6	216227	2018	6	2	25	Ruby Valley Community Hospital	Virginia Beach	NY
7	216243	2019	2	1	10	Kindred Soul Hospital Center	Columbus	NY
8	216274	2019	5	2	41	Grand River Hospital Center	Anaheim	NY
9	3069154	2020	1	1	42	Pinevalley Medical Clinic	Tampa	NY
10	209790	2019	12	4	10	Kindred Soul Hospital Center	Fresno	NY
11	209793	2019	3	1	55	Summerfield General Hospital	Austin	NY
12	3069448	2020	2	1	56	Peak View Medical Clinic	Richmond	NY
13	210856	2019	12	4	59	Orange Garden Medical Center	Tulsa	NY
14	2122865	2020	6	2	2	Progress Community Hospital	Greensboro	NY
15	210899	2018	4	2	58	Hillsdale Hospital Center	St. Paul	NY
16	201177	2018	3	1	46	Horizon Hospital	Fresno	NY
17	201182	2018	2	1	13	Cherry Blossom Community Hospita	al Colorado	NY
18	201198	2018	3	1	48	Good Samaritan Hospital Center	Tampa	NY
83739	5003931	2020	1	1	34	Stillwater Medical Center	Grand Rapids	NY
83740	5004087	2020	12	4	45	Rosewood Medical Center	Portland	NY
83741								
83742								
	⊢ Tr	raining	(+)					
Ready	Access	ibility: Investiga	ate					



STEPS TO COMPLETE EXAMPLE:

- 1. Open the Excel file containing the data for analysis.
- 2. Select all columns.
- 3. From the ribbon select Insert : PivotTable : From Table/Range.
- 4. Click OK.

A new tab will be created and appear similar to the following. We'll **categorize** our report and select a **calculation** value.

- 5. In the *PivotTable Fields pane* select the following fields:
 - Facility (Rows section)
 - Visit_Month (Columns section)
 - Claim_ID (\sum Values section)

A	В	С	D	Е	F	G	Н	T	J	K	L	М	N	0	^	Discottable Cald		* X
1																PivotTable Field	5	* X
2																Choose fields to add to rep	ort:	- ¢ -
3 Count of Claim_ID	Column Labels 👻															choose helds to add to rep	516	н
4 Row Labels	1	2	3	4	5	6	7	8	9	10	11	12	(blank)	Grand Total		Search		Q
5 Alliance General Hospital	92	90	91	125	92	109	90	101	101	96	101	118		1206				
6 Amity Medical Clinic	111	100	101	100	102	110	108	112	104	82	110	103		1243		Claim_ID		
7 Angelvale Hospital Center	99	109	90	107	102	103	81	100	107	102	100	122		1222		Visit_Year		
8 Angelvale Medical Center	98	113	113	125	104	100	119	94	91	113	104	99		1273		✓ Visit_Month		
9 Big Heart Hospital	105	107	114	105	103	100	86	97	121	98	116	101		1253		Visit_Quarter		
10 Blossomvale Hospital	121	119	87	121	98	117	137	109	91	108	106	96		1310		Facility_ID		
11 Cherry Blossom Community Hospital	102	88	109	125	94	89	98	120	81	96	107	107		1216		✓ Facility		
12 Clearwater Valley General Hospital	106	107	95	106	111	96	108	87	85	110	105	107		1223				
13 Clemency General Hospital	111	111	78	91	98	108	112	84	104	90	92	102		1181		Drag fields between areas	pelow:	
14 Desert Springs Hospital Center	94	114	108	103	86	104	74	92	86	104	119	117		1201				
15 Diamond Grove Medical Center	100	113	114	112	111	86	102	100	107	102	102	89		1238		T Filters	III Columns	
16 Fairview Hospital	106	92	92	110	94	120	103	93	94	95	95	117		1211			Visit_Month	-
17 Flowerhill Community Hospital	102	98	91	90	116	104	114	89	100	98	111	105		1218				
18 Genesis Hospital Center	99	105	114	114	98	114	114	107	98	93	88	98		1242		≡ Rows	Σ Values	
19 Good Samaritan Hospital Center	85	82	97	96	96	98	112	94	92	89	99	95		1135		Facility		•
20 Grace Medical Clinic	87	102	100	107	118	101	94	100	89	103	103	104		1208		raciiity	Count of Claim_ID	•
21 Grand Meadow Medical Clinic	92	103	126	91	86	79	98	105	91	90	113	89		1163				
22 Grand Plains Medical Clinic	105	110	98	88	100	102	97	103	101	96	109	105		1214	-	Defer Layout Update		Update
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- 6. Report formatting changes:
 - A. Cell A3 text changed to: COUNT OF CLAIMS.
 - B. Cell A4 text changed to: FACILITY.
 - C. Cell C3 text changed to: MONTH.
 - D. Cell D4 text changed to: TTL.
 - E. Month values centered and column width reduced to 5.5.
 - F. PivotTable Styles style changed to dark blue.

	A	В	С	D	E	F	G	н	1	J	К	L	М	N
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4	B FACILITY 🗾	1	2	3	4	5	6	7	8	9	10	11	12	TTL
5	Alliance General Hospital	92	90	91	125	92	109		101	101	96	101	118	1,206
6	Amity Medical Clinic	111	100	101	100	102	110	108	112	104	82	110	103	1,243
7	Angelvale Hospital Center	99	109	90	107	102	103	81	100	107	102	100	122	1,222
8	Angelvale Medical Center	98	113	113	125	104	100	119	94	91	113	104	99	1,273
9	Big Heart Hospital	105	107	114	105		100	86	97	121	98	116		1,253
10	Blossomvale Hospital	121	119	87	121	98	117	137	109	91	108	106	96	1,310
11	Cherry Blossom Community Hospital	102	88	109	125	94	89	98	120	81	96	107	107	1,216
:														
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Report Filters

1. To filter the data by YEAR, in the PivotTable Fields pane, drag the Visit_Year field to the **Filters** section.

	A	В	С	D	E	F		
1	Visit_Year	(All) 🔽	↓				PivotTable Fields	▼ X
2 `			·				Choose fields to add to report:	₫ -
3	COUNT OF CLAIMS	МОЛТН 🏹			i		choose news to add to report.	- M
4	FACILITY 🗾	1	2	3	4	5	Search	Q
5	Alliance General Hospital	92	90	91	125	9		
6	Amity Medical Clinic	111	100	101	100	10	Claim_ID	A
7	Angelvale Hospital Center	99	109	90	107	10	✓ Visit_Year Drag the fiel	ld 🗌
8	Angelvale Medical Center	98	113	113	125	10	Visit_Month 'Visit_Year' to t	the ' 🛛 🔻 🚽
9	Big Heart Hospital	105	107	114	105	10	Visit_Quarter 'Filters' secti	ion
10	Blossomvale Hospital	121	119	87	121	9	Facility_ID	
11	Cherry Blossom Community Hospital	102	88	109	125	9	✓ Facility	
12	Clearwater Valley General Hospital	106	107	95	106	11		<u> </u>
13	Clemency General Hospital	111	111	78	91	9	Drag fields between areas below:	
14	Desert Springs Hospital Center	94	114	108	103	8	Drag neus settreen areas seton.	
15	Diamond Grove Medical Center	100	113	114	112	11	▼ Filters III Colum	nns
16	Fairview Hospital	106	92	92	110	9	 Visit Year	ith 💌
17	Flowerhill Community Hospital	102	98	91	90	11		
18	Genesis Hospital Center	99	105	114	114	9	≡ Rows Σ Value	.c
19	Good Samaritan Hospital Center	85	82	97	96	9		
20	Grace Medical Clinic	87	102	100	107	11	Facility COUNT C	OF CLAIMS
24							 	

- 2. To filter the results by **FACILITY**, select the drop-down arrow in the **A4** cell.
- 3. Under the Search box, uncheck the (Select All) option.
- 4. Check the boxes for the facilities you want returned.
- 5. Click OK.

3	COUNT OF CLAIMS	MON																
₽J	Sort A to Z	,																
Z↓	Sort Z to A																	
	More Sort Options																	
T _×	Clear Filter From "Facility"		57	A	В	-	С	D	E	F	G	н		J	ĸ	L	м	N
	Label Filters uncheck the		1	YEAR		.Τ					-	Itere	d by	,	K	L	IVI	14
	Value Filters / box (Select All)		2	TEAN	2020		<u> </u>			ΎYE				ITY'				
	Search	ρ	3	COUNT OF CLAIMS	MONTH													
		~	4	FACILITY 🗾	1		2	3	4	5	6	7	8	9	10	11	12	TTL
		11	5	Angelvale Hospital Center	3	38	33	34	33	29	31	23	24	39	30	28	38	380
		1	6	Angelvale Medical Center	3	33	35	35	44	36	40	46	38	26	33	33	23	422
	Angelvale Hospital Center		7	ΠL	7	1	68	69	77	65	71	69	62	65	63	61	61	802
1	- Angelvale Medical Center																	
		_:																



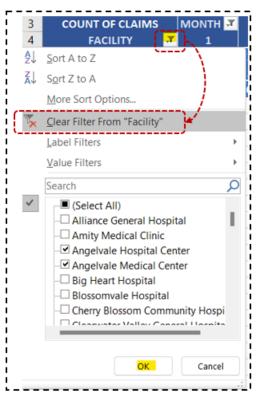
Label Filtering Within A Result Set

When you have long list of text values, for instance 60+ facilities, checking each location box you want returned may be inefficient. An easier way is to use the **Label Filtering** feature.

EXAMPLE:

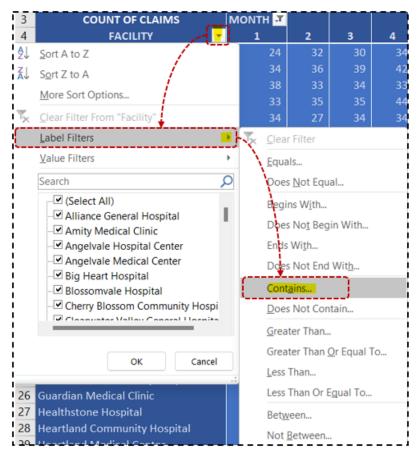
Create a report returning all facilities with *Clinic* in the name.

1. Remove the previous filter by selecting the drop-down arrow in cell A4 and then <u>Clear Filter From</u> "Facility"





2. Select Label Filters and then the Contains... option.



3. When prompted, enter *Clinic.

Label Filter (Facility)	Enter aster	isk ?	\times
Show items for which the label	€ *Clinic		
contains	✓ Clinic		
Use ? to represent any single ch Use * to represent any series of			
	ОК	Can	cel



4. Click OK.

	A	В	C	D	E	F	G	Н	- 7 -		К	Ľ	M	N
1	YEAR	2020 🏾 🏋	-				Clain	n cour	nts for	all fac	ilities	with		
2				_		- 'C	linic'	in the	name	for th	e Yea	r 202	0	
3	COUNT OF CLAIMS	MONTH 🕶							1				8	
4	FACILITY 🗾	1	2	3	4	5	6	7	8	9	10	11	12	TTL
5	Amity Medical Clinic	34	36	39	42	32	37	33	38	38	20	33	37	419
6	Grace Medical Clinic	27	27	33	47	41	33	28	38	28	32	35	36	405
7	Grand Meadow Medical Clinic	36	31	31	16	27	25	33	29	29	34	34	26	351
8	Grand Plains Medical Clinic	41	41	31	27	32	37	31	35	28	33	45	30	411
9	Guardian Medical Clinic	32	30	37	28	26	28	46	36	32	34	30	39	398
10	Kindred Clinic	35	34	31	28	28	34	36	32	34	34	38	30	394
11	Lilypad Gardens Clinic	31	32	29	45	29	46	31	33	34	43	44	32	429
12	Peace River Clinic	> ▲31	29	34	37	33	37	25	33	32	32	32	26	381
13	Peak View Medical Clinic	47	38	38	39	22	29	34	42	38	22	36	42	427
14	Petunia Medical Clinic	32	26	38	34	30	25	29	44	38	38	34	27	395
15	Phoenix Clinic	29	39	35	27	31	54	44	33	37	31	31	38	429
16	Pinevalley Medical Clinic	37	32	36	26	36	32	33	42	38	29	36	29	406
17	Principal Clinic	26	40	38	25	38	32	30	25	42	43	32	45	416
18	Progress Clinic	35	35	35	28	40	28	25	39	28	25	40	44	402
19	Trinity Medical Clinic —	30	33	39	41	31	35	37	38	35	40	30	33	422
20	πι	503	503	524	490	476	512	495	537	511	490	530	514	6,085



SECTION 5 Frequency Reporting

Using diagnosis and treatment codes, we'll review how often a value is occurring.

WHAT Are The Most Frequently Used Dxcode1 Values?

EXAMPLE:

Create a report displaying the Top 10 Dxcode1 Values.

SAMPLE DATA:

Field used in this exercise:

a. Dxcode1

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	Clipboar	rd I		Font				Alignn	nent		i N	umber	5	
СС)27	• = >	< 🗸	fx										
	А	В	AD	BC	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK
1	Claim_ID	Visit_Year	Dxcode1	CPTcode1										
2	4725043	2020	S728X2K	E2385										
3	1692982	2020	S14118D	G8695										
4	2122703	2020	091219	L7009										
5	2776092	2020	M4851XS	64520										
	3069154	2020	0360913	63173										

STEPS TO COMPLETE EXAMPLE:

- 1. Open the Excel file containing the data for analysis.
- 2. Select all columns.
- 3. From the ribbon select Insert : PivotTable : From Table/Range.
- 4. Click OK.



A new tab will be created and appear similar to the following. We'll **categorize** our report and select a **calculation** value. <u>Note:</u> Drag the **Dxcode1** field to <u>both</u> the **Rows** and **Values** sections.

5. In the *PivotTable Fields pane* select the following fields:

- Dxcode1 (Rows section)
 - **Dxcode1** (\sum Values section)

1	. D	ي ، ج	~ 🖻	*	Code_Trai	ning_M	oc	PivotTable	то S	ign in	Ŧ		O	×
F	ïle H	ome	t Page L	Formu D	ata Reviev	View	Help	PivotTabl	e Analyze	Design	Ŷ	Tell me	Я	Share
_ L	otTable	Active Field ~	Group	Filter	Refresh C	hange l Source Data		Actions	Calcula		Tools	Show		^
A3		• I	\times	$\checkmark f_x$	Row L	abels								~
1 2		A	В		С			otTak					Ŧ	×
3 4 5	A009 A0103	bels 💌 C	ount of I	1 2			Sea							Q
6 7 8 9	A0104 A011 A020 A0225			1 1 1				Dxcode2		ag the fi		xcode1' f /alues' se		<u>h</u> the
9 10 11 12	A0223 A0229 A030 A032			1				Dxcode3 Dxcode4						-
12 13 14 15	A032 A040 A042 A044			2 1 1 1				ig fields b Filters	etween a	reas belo		olumns		
16 17	A044 A046 A0471 A0472			1			=	Rows			ΣV	alues		
19 20	A0472 A051 A052			1 1 1		-	D	code1		•	Coun	t of Dxcode		<u> </u>
	(►	Sheet Accessibility				Þ		Defer Lay	out Upda	ate 四 -				Update



- 6. Report formatting changes:
 - A. Cell A3 text changed to: DIAGNOSIS_CD.
 - B. Cell **B3** text changed to: **COUNT DX_1**.
 - C. PivotTable Styles style changed to light orange.

	А	В
1		
2		
3	DIAGNOSIS_CD 👻	COUNT DX_1
4	A009	1
5	A0103	2
6	A0104	1
7	A011	1
8	A020	1
	Image Tru	ncated

Filtering for The Top 10 Dxcode1 Values

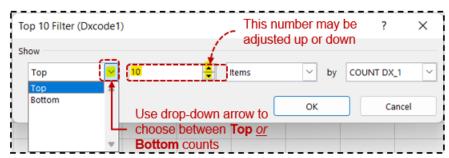
Our initial results have identified over 20K different codes used for **DXCODE1**. Therefore, to make the results more meaningful, we'll identify only the **Top 10 used diagnosis codes**.

- 1. Click the drop-down arrow in the A3 cell.
- 2. Select <u>Value Filters</u> and then the <u>Top 10...</u> option.

	A	В	C	;	D	E		
H								
DI	AGNOSIS_CD	COUNT DX_1						
	ort A to Z	\sum						
, S <u>c</u>	ort Z to A		_					
M	ore Sort Options		-	_				
<u><u>c</u>l</u>	ear Filter From "Dxco	de1"						
<u>L</u> a	bel Filters	- <u>1</u> +						
Va	alue Filters		T _×	<u>C</u> lear	Filter			
Se	arch	Q		Equal	s			
Г	(Select All)			Does <u>N</u> ot Equal				
	🗹 A009 🗹 A0103			Greater Than				
	A0103			Greater Than Or Equ				
	- 🗹 A011			<u>L</u> ess T	han			
	🗹 A020 🗹 A0225			Less Than Or Egual To				
	A0229			Between				
	A030			◆Not <u>B</u> etween				
1	Not all items showing	ng	(Top 1	0			
			·					
	OK	Cancel		_				



- 3. When prompted, accept the *default* Top 10 Items by COUNT DX_1.
 - The filter number may be adjusted up or down, i.e., Top 5 or 20.
 - The first drop-down allows you to choose between Top or Bottom counts.



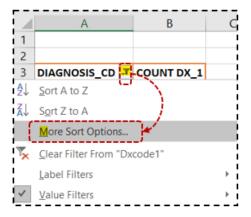
4. Click OK.

	А	В
1		
2		
3	DIAGNOSIS_CD 🖛	COUNT DX_1
4	A4851	4
5	C8268	4
6	F14181	4
7	H15841	4
8	170628	4
0	Image Trunc	ated

Sorting PivotTable Results

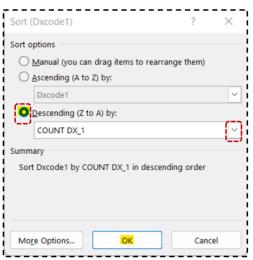
Next, let's sort the results to improve the readability.

- 1. Click the drop-down arrow in the A3 cell.
- 2. Select the More Sort Options... button.





- 3. When prompted:
 - Select the **Descending (Z to A) by:** radio button.
 - Select the drop-down arrow and choose COUNT DX_1.



4. Click OK.

	А	В
1		
2		
3	DIAGNOSIS_CD	COUNT DX_1
4	S82041E	5
5	S89391G	5
6	V4374XD	5
7	S92144B	4
8	S62639A	4
9	W429XXS	4
10	170628	4
11	S75121A	4
12	M05822	4
	Image Trunc	ated



What Are The Top 10 Dxcode1 And Corresponding Treatment (CPTCode1) Codes?

Lastly, let's add the treatment code that was used for each of the Top 10 Dxcode1 values.

1. In the *PivotTable Fields pane* drag the CPTcode1 field to the Rows section:

1	A	В	С		PivotTable Fields	Ţ	×
1				\square	Pivol l'able Fields		
2					Choose fields to add to report:		- d-
3	DIAGNOSIS_CD	COUNT DX_1			choose helds to add to report.		
4	🖃 \$82041E	5			Search		ρ
5	27151	1					
6	78282	1			Dxcode22		A
7	86717	1			Dxcode23		
8	G6014	1					
9	L5636	1			Drag the field 'CPTcode1' to)	
10	🖃 \$89391G	5			Dxcode25 the 'Rows' section		
11	67314	1			CPTcode1		_
12	86304	1			j – j		
13	3305F	1			Drag fields between areas below:		
14	E1841	1			brug helds between areas below.		
15	J7632	1			▼ Filters III Columns		i
16	⊟ V4374XD	5					
17	22861	1					
18	27443	1					
19	35571	1					
20	50620	1			■ Rows ∑ Values		į
21	93528	1			Dxcode1 COUNT DX_1		
22	🖃 S92144B	4			CPTcode1 🕊 👻		
23	880	1					i
24	53405	2		-			Unders
	→ Sheet	+ : •	•		Defer Layout Update		Update

Tabular Form Report Layout

To display the **CPTcode1** field as a separate column:

- 1. From the **PivotTable Tools: Design** ribbon, select the **Report Layout** drop-down arrow.
- 2. Select Show in Tabular Form.

6		• ب رو ا	c> ~ [- 11 -	Code_Tra	ining_M	ock_Data.xl	sx - Exce		PivotTa	ble Tools	
F	ile	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	PivotTable Ana	alyze Des	ign)
					Row Headers		Banded Ro	ws				
Sub	ototals ~	Grand Totals ~	Report Layout	t Blank 🔽 Rows ~	Column Heade	ers 🗌	Banded Co	lumns			,=====	
i_		Layou		Show in Compa	et Form	Style	Options					PivotT
A3		-		Show in <u>c</u> ompa	ict Form	D						
		А	-	Show in Outline	e Form		E	F	G	н	1	J
1		(- T						
2				Show in <u>T</u> abula	r Form							
3	DIAG	NOSIS_C										
4	⊟ S8 2	2041E		Benest All Item	Labels							
5	2	27151		Repeat All Item	Labels							
6	7	78282	-==									
7	8	36717		Do Not Repeat	Item Labels							
8	(56014		1								



For each <u>Dxcode1 entry of "S82041"</u> the corresponding <u>CPTcode1 values</u> were:

- 27151
- 78282
- 86717
- G6014
- L5636

	А	-	В	С
1				
2				
3	Dxcode1	j T	CPTcode1 -	COUNT DX_1
4	🖃 \$82041E		27151	1
5			78282	1
6			86717	1
7			G6014	1
8			L5636	1
9	S82041E Total			5
10	🖃 \$89391G		67314	1
11			86304	1
12			3305F	1
13			E1841	1
14			J7632	1
15	S89391G Total			5
16	🖃 V4374XD		22861	1
17			27443	1
18			35571	1
19			50620	1
20			93528	1
21	V4374XD Total			5
22	🖃 \$92144B		880	1
23			53405	2
24			77424	1
25	S92144B Total			4



SECTION 6 *PivotTable Dashboard Example and Importing .CSV Files (Part 2)*

For our last section, we'll review how to add multiple PivotTables to a single Excel worksheet for a monthly dashboard. We'll include how to refresh the data and keep our current formatting and summarizations. What is a Dashboard?

In the simplest terms, a *business* or *digital* dashboard is a display of metrics in numeric or graphical form. These metrics or what is commonly referred to as *measures*, range widely depending on the customer and type of organization.

The components of a dashboard vary, but typically include one or more of the following:

- provide an answer to a business or operations question;
- display the most current conditions of an organization, i.e., sales, calls, bookings, recruits;
- show comparisons such as this year's sales compared to last year's sales;
- the progress toward meeting a target, for example reaching a sales, production or safety goal; and
- trends such as identifying if an activity is *trending* up, down or about the same.

A dashboard is usually limited to one functional area, like manufacturing, human resources, finance, logistics, or marketing and may be static or interactive.

Dashboard Design

Elements of a well-designed dashboard include working closing with the consumers of the information to understand:

- How are they are planning to use the material in the dashboard to improve their objectives? Will they be tracking performance, monitoring progress or something else?
- How will they measure the success or usefulness of the dashboard?
- Will the dashboard be temporary or a permanent part of your customer's daily, weekly or monthly routine?
- How will your audience view or access the dashboard, at what *frequency* (real-time, daily, weekly or monthly), and what, if any, security (data access) issues will need to be addressed?

The purpose of the dashboard should be clear to anyone viewing it and include:

- a *title* or brief description of the dashboard; and
- the *time period* the data cover.



A Basic Operations Monthly Dashboard

EXAMPLE:

- Develop a report showing the total claims year-to-date by payer, attending and operating specialty.
- The report design should allow for monthly updating from a .CSV file.

Fields used in this dashboard:

- a. Claim_ID
- b. Visit_Month
- c. Payor_Categorey_Description
- d. Attending_Physician_Specialty
- e. Operating_Physician_Specialty

The	customer	has	requested	the	output	be	similar	to	the	following:	
-----	----------	-----	-----------	-----	--------	----	---------	----	-----	------------	--

	А	В	C	D E	F	G H	H I	J	K I	. М	Ν	0
1	West	view	Hosp	ital - 2022 Oper	ration	ns Sum	nmarv					
_	Periods:											
3	renous.	1-12										
-	MONTH -	CLAIMS	CLAIM_%	PAYER 🔽	CLAIMS	CLAIM_%	ATTENDING SPECIALITY	CLAIMS	CLAIM_%	OPERATING SPECIALITY	CLAIMS	CLAIM_%
5	1	53	7.3%	Blue Cross	6.70%	6.7%	Allergy and immunology	35	4.8%	Allergy and immunology	37	5.1%
; [2	67	9.2%	CHAMPUS	0.55%	0.5%	Anesthesiology	36	4.9%	Anesthesiology	40	5.5%
· [3	71	9.7%	Insurance Company	33.93%	33.9%	Dermatology	55	7.5%	Dermatology	33	4.5%
	4	67	9.2%	Medicaid	30.92%	30.9%	Diagnostic radiology	40	5.5%	Diagnostic radiology	37	5.1%
)	5	60	8.2%	Medicare	16.14%	16.1%	Emergency medicine	32	4.4%	Emergency medicine	42	5.79
0	6	66	9.0%	Other Federal Program	0.41%	0.4%	Family medicine	43	5.9%	Family medicine	42	5.7%
1	7	63	8.6%	Other Non-Federal Program	n 0.82%	0.8%	Internal medicine	22	3.0%	Internal medicine	37	5.19
2	8	49	6.7%	Self-Pay	0.41%	0.4%	Medical genetics	38	5.2%	Medical genetics	35	4.89
3	9	57	7.8%	Unknown	0.68%	0.7%	Neurology	38	5.2%	Neurology	40	5.59
4	10	59	8.1%	Workers Compensation	8.62%	8.6%	Nuclear medicine	37	5.1%	Nuclear medicine	34	4.79
5	11	58	7.9%	(blank)	0.82%	0.8%	Obstetrics and gynecology	40	5.5%	Obstetrics and gynecology	22	3.09
6	12	61	8.3%	TOTAL	100.0%	100.0%	Ophthalmology	25	3.4%	Ophthalmology	35	4.89
7	(blank)		0.0%				Pathology	32	4.4%	Pathology	30	4.19
8	TOTAL	731	100.0%				Pediatrics	37	5.1%	Pediatrics	38	5.29
9							Physical medicine and rehabilitation	34	4.7%	Physical medicine and rehabilitatio	42	5.79
0							Preventive medicine	38	5.2%	Preventive medicine	28	3.89
1							Psychiatry	28	3.8%	Psychiatry	36	4.99
2							Radiation oncology	30	4.1%	Radiation oncology	44	6.09
3							Surgery	45	6.2%	Surgery	34	4.79
4							Urology	39	5.3%	Urology	40	5.59
5							(blank)	7	1.0%	(blank)	5	0.79
5 6							TOTAL	731	100.0%	TOTAL	731	100.0%

STEPS TO COMPLETE DASHBOARD:

Dashboard development is an iterative process. To ensure your design has proper spacing and readability, you'll need test your PivotTable results in different worksheet locations to account for record size and for additional records to be added, such as new weeks and/or months.

- 1. Create a new blank Excel spreadsheet by pressing **ctrl + n** on your keyboard.
- 2. Save the file using a descriptive name, for example, Monthly_Operations_Summary.xlsx.
- 3. Add a title and time period; in this example, **Westview Hospital 2022 Operations Summary**. The time period is left blank for now, as we'll update the months when refreshing the data.

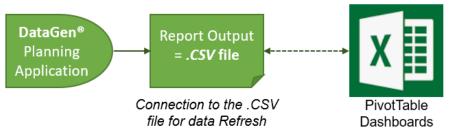
A B	C D E F	G H I J							
Westview Hospital - 2022 Operations Summary									
2 Periods:	Used green shading for	Increased font size to 22							
3	cells 'A2:B2'	for cell 'A1'							



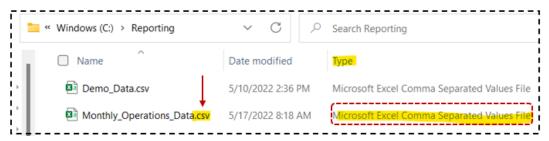
4. Place your cursor in the cell where the first PivotTable will be placed. In this example, it will be cell A4.

Importing .CSV Files (Part 2)

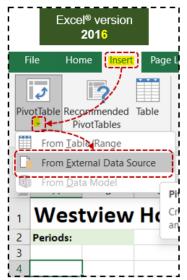
As discussed in Section 2, file importing in Excel may be accomplished in multiple ways. Since we're creating a dashboard and <u>our report is recurring</u>, importing the .CSV data directly into the PivotTable is our best approach. This method will allow us to keep our existing PivotTable formatting and add new data using the **Refresh** feature.

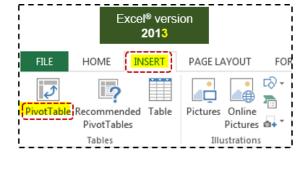


6. Save and name the .CSV file to a file share you have access to or your local machine. In this example, the directory C:\Reporting was created with the file name Monthly_Operations_Data.csv.



- 7. Return to the spreadsheet you created in **step #2** above; in our example this is file: **Monthly_Operations_Summary.xlsx**.
- 8. With your cursor in cell A4, from the ribbon select Insert : PivotTable : From External Data Source.







The following dialogue box will appear:

9. Click the **Choose <u>C</u>onnection...** button.

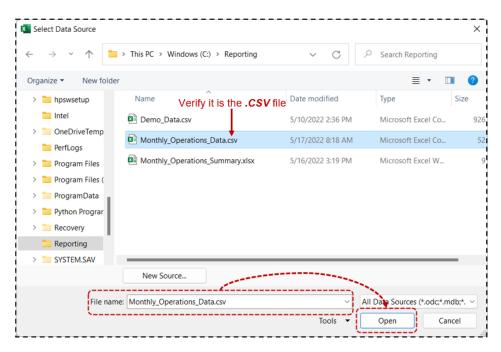
Excel [®] version 2016		Excel [®] version 2013
2010		Create PivotTable ?
otTable from an external source	? ×	Choose the data that you want to analyze O Select a table or range Table/Range:
an external data source hoose <u>C</u> onnection nection name: se where you want the PivotTable to be placed		Connection name: Use this workbook's Data Model Choose where you want the PivotTable report to be placed
<u>N</u> ew Worksheet <u>E</u> xisting Worksheet		 <u>New Worksheet</u> <u>Existing Worksheet</u>
cation: Sheet1!\$A\$4	1	Location: Sheet1!\$A\$4
ose whether you want to analyze multiple tables Add this data to the Data <u>M</u> odel OK	Cancel	Choose whether you want to analyze multiple tables Add this data to the Data Model OK Cancel

A prompt *similar* to the following should appear:

Existing Connections		?	×
Select a Connection or Table			
<u>C</u> onnections <u>T</u> ables			
Show: All Connections			_
Connections in this Workbook <no connections="" found=""></no>			
Connection files on the Network <no connections="" found=""></no>			
Connection files on this computer			
Code_Training_Mock_Data Training\$.od [Blank]			
<u>B</u> rowse for More	<u>O</u> pen	Cance	el



- 10. Click the **Browse for More...** button.
- 11. When prompted, select the file path where the .CSV file is located.
- 12. Click the **Open** button.



The following Text Import Wizard will be displayed:

- 13. Select the **Delimited** radio button and the <u>My data has headers</u> check box.
- 14. Click the <u>Next></u> button.

Text Import Wizard - Step 1 of 3		?	×
The Text Wizard has determined that your data is Delimit	ed.		
If this is correct, choose Next, or choose the data type th	at best describes your data.		
Original data type			
Choose the file type that best describes your data: Delimited - Characters such as commas or	tala annuata and field		
 Delimited - Characters such as commas or Fixed width - Fields are aligned in columns w 			
	sur spaces between each neta.		
Start import at <u>r</u> ow: 1 File <u>o</u> rigin:	65001 : Unicode (UTF-8)		~
My data has headers.			
Preview of file C:\Reporting\Monthly_Operations_Data.	csv.		
2125066,2022,1,1,12,Westview Hospital,M 3138847,2022,1,1,12,Westview Hospital,I 4149532,2022,1,1,12,Westview Hospital,T 5299897,2022,1,12,Westview Hospital,I	Quarter, Facility_ID, Facility, Facility_Co liami,NY,3, Insurance Company,28, Medicare, as Vegas,NY,15, Workers Compensation,27, I ulsa,NY,25, Insurance Company,21, Insuranc os Angeles,NY,8, Insurance Company,10, Med nchorage,NY,7, Insurance Company,20, Medic	2047074067, nsurance Co e Company, icaid,11170	
Ca	ancel < Back Next >	<u> </u>	



Step 2 of the Text Import Wizard will be displayed:

- 15. For the Delimiters, select the $\underline{C}omma$ check box.
- 16. Click <u>Finish</u>.

Text Import Wizard - S	Step 2 of 3					?	×
This screen lets you set t Delimiters Iab Semicolon Space Other: Other: Data preview	check	tive delimiters as on		text is affect	ed in the pre	view below.	
Claim_ID_Visit_Y 125066 2022 138847 2022 149532 2022 299897 2022 316078 2022	ear Visit_Month 1 1 1 1	Visit_Quarter 1 1 1 1 1	Facility_ID 12 12 12 12 12 12 12	Westview Westview Westview Westview	Hospital Hospital Hospital Hospital	Las Vegas	I

The following prompt will appear:

- 17. Click the Add this data to the Data Model checkbox.
- 18. Click OK.

PivotTable from an external source ? X									
Use an external data source									
Choose <u>C</u> onnection	Choose <u>C</u> onnection								
Connection name: Monthly_Operations_Data									
Choose where you want the PivotTable to be place	ed								
O <u>N</u> ew Worksheet			į						
• Existing Worksheet			i						
Location: Sheet1!\$A\$4			Í						
Choose whether you want to analyze multiple tab	les		i						
Add this data to the Data Model									
1	ОК	Car	ncel						



A prompt similar to the following should appear (it may take moment to load):

: (
LOADING DATA MODEL	▦	I		-	-+	100%

We have now established our data connection with the .CSV file and may now begin developing our PivotTable reports.

	A	В	Ċ	D	Ē	A	Divot	Table Fiel	de	- ×
1	West	tview	Hosp	oital -	202		Active		us	
	Periods:		_							
3							Choose f	ïelds to add to r	eport:	\$ T
4 5							Search			Q
6		PivotTable1	L					onthly_Operation	ns_Data	
7 8		report, cho					<] Claim_ID	ields from	
9	from the	PivotTable	Field List					Visit_Year th	e .CSV file	
10								Visit_Month		
11		-						Visit_Quarter		-
12 13							Drag fie	lds between are	as below:	
14							Drug ne	ius between are	as below.	Ì
15							T Filte	rs	Columns	5
16 17										
18										
19							Row	/S	Σ Values	
20										
21										
11_										

Multiple PivotTable Reports On A Single Worksheet

Adding more than one PivotTable to single worksheet is simply a matter of copying and pasting the PivotTable with the connection to the .CSV file.

We'll begin by creating our first PivotTable on which all the others will be based.



STEPS:

- 1. In the *PivotTable Fields pane* select the following fields:

 - Claim_ID (Σ Values section)

Please note: we're adding Claim_ID twice; we'll be using the second instance as a % column.

	A	В	C D	
	Westvie	ew Hospita	al - 2022 Ope	PivotTable Fields
	Periods:			
3				Choose fields to add to report:
4	Row Labels 🝸 S	Sum of Claim_ID Sur	n of Claim_ID2	Search
5	1	133616387	133616387	Bearch
5	2	152476193	152476193	Claim_ID - Drag
7	3	158171138	158171138	Visit_Year
В	4	169980878	169980878	
9	5	160042392	160042392	✓ Visit_Month
0	Grand Total	774286988	774286988	Visit_Quarter
1				Facility_ID
2				
3				Drag fields between areas below:
4				
5				T Filters
6				Σ Valu
7				
8				
9				■ Rows ∑ Valu
0				Visit_Month Visit Sum of
21				Sum of



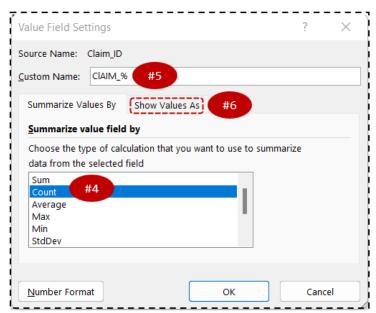
Displaying Percentages In PivotTables

- 2. Click the Sum of Claim_ID2 drop-down arrow.
- 3. From the sub-menu, select the Value Field Settings... option.

✓ Visit_Month		Move <u>U</u> p
Visit_Quarter		Move <u>D</u> own
Facility_ID		Move to Beginning
Drag fields between area		Move to <u>E</u> nd
Drag fields between area	T	Move to Report Filter
T Filters		Move to Row Labels
		Move to Column Labels
	Σ	Move to Values
Rows	×	Remove Field
Visit_Month 🔻	6	Value Field Setti <u>n</u> gs
	Sum	of Claim_ID2

The following dialogue box will appear:

- 4. From the Summarize value field by list, select the Count option.
- 5. In the Custom Name: field change to CLAIM_%.
- 6. Select the Show Values As tab.





- 7. From the Show values as drop-down list select % of Grand Total.
- 8. Click OK.

Source Name:	Claim_ID			
Custom Name:	CIAIM_%			
Summarize V Show v <u>a</u> lues		/alues	As	
% of Grand	Total	K		
Base field:			Base item:	
Wisit_Month		•		^
				w

- 9. <u>*Right-click*</u> cell **B4** and from the sub-menu select **Summarize Values By** then the **Count** option.
- 10. Report formatting changes:
 - a. The period values 1 5 were entered for cell B2.
 - b. Cell A4 text changed to: MONTH.
 - c. Center values in cells A5:A9.
 - d. Cell **B4** text changed to: CLAIMS.
 - e. Cell A10 text changed to: TOTAL.
 - f. Cells C4:C10 percent have <u>one</u> decimal place.
 - g. PivotTable Styles style changed to dark green.
 - h. Added border/gridlines to PivotTable.

	А	В	С
1	West	view	Hospi
2	Periods:	1 - 5	
3			
4	MONTH	CLAIMS	CLAIM_%
5	1	53	16.7%
6	2	67	21.1%
7	3	71	22.3%
8	4	67	21.1%
9	5	60	18.9%
10	TOTAL	318	100.0%

Once we have the PivotTable formatted, we may now use it as the template for the other entries.



11. Select and copy (ctrl + c on your keyboard) cells A4:C10.

- Paste (**ctrl + v** on your keyboard) to cell **E4**.
- Paste (ctrl + v on your keyboard) to cell I4.
- Paste (ctrl + v on your keyboard) to cell M4.

		Copy (Ctrl 'A4:C10'	+C)	Paste (Ct to cell '			Paste (Ctr to cell 'le			Paste (Ctrl to cell 'M		
1	А	В	C	DE	F	G H	1 1	J	К	L M	N	0
I	West	view	Hospit	al - 20	22 Op	peratio	ons Su	mma	ry			
2	Periods:	1 - 5	•									
3	ī			-			-			-		
Ļ.	MONTH 👻	CLAIMS	CLAIM_%	MONTH -	CLAIMS	CLAIM_%	MONTH -	CLAIMS	CLAIM_%	MONTH -	CLAIMS	CLAIM_
5	1	53	16.7%	1	53	16.7%	1	53	16.7%	1	53	16.7
5	2	67	21.1%	2	67	21.1%	2	67	21.1%	2	67	21.1
1	3	71	22.3%	3	71	22.3%	3	71	22.3%	3	71	22.3
3	4	67	21.1%	4	67	21.1%	4	67	21.1%	4	67	21.1
)	5	60	18.9%	5	60	18.9%	5	60	18.9%	5	60	18.9
0	TOTAL	318	100.0%	TOTAL	318	100.0%	TOTAL	318	100.0%	TOTAL	318	100.0

Select cell E4 and change the text to PAYER.

12. From the PivotTable Fields pane uncheck Visit_Month.

13. From the PivotTable Fields pane drag field Payor_Category_Description to the Rows section.

4	В	С	D E	F	G	H 🔺	PivotTable Fields	- ×
1	view	Hospit	tal - 2022 Oper	ation	s Sum	nn		
2	1-5		Select cell 'E4' & Cha				Active All	
3			text to 'PAYER'	ingo			Choose fields to add to report:	40 T
4	CLAIMS	CLAIM_%	PAYER	CLAIMS	CLAIM_%			
5	53	16.7%	(blank)	4	1.3%		Search	<u>ر</u>
6	67	21.1%	Blue Cross	25	7.9%		L 🖆	
7	71	22.3%	CHAMPUS	1	0.3%		/isit_Month Uncheck	
8	67	21.1%	Insurance Company	113	35.5%		Visit_Quarter 'Visit_Month'	
9	60	18.9%	Medicaid	88	27.7%		Facility_ID	
10	318	100.0%	Medicare	44	13.8%		☐ Facility	
11			Other Federal Program	1	0.3%			
12 13			Other Non-Federal Program	n 4	1.3%		Facility_County	
			Self-Pay	4	1.3%		Facility_State	
14			Unknown	1	0.3%		Payor_Category_Code	
15			Workers Compensation	33	10.4%		Payor_Category_Description	
16			TOTAL	318	100.0%		1	Ŧ
17							Drag fields between areas below:	
18						/	Diag fields between aleas below.	
19							▼ Filters III Columns	
20							Σ Values	•
21							Z values	
22								
23							■ Rows ∑ Values	
24							Payor_Category_Description CLAIMS	-
25							CLAIM/S	
26								

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14. Repeat steps **#12 - #14** for cells **I4 (Attending Physician Specialty)** and **M4 (Operating Physician Specialty)**.

	А	В	C I	D E	F	G	н	J	к	L M	N	0
1	_		Hospit	al - 2022 Opera	tions	s Sumr	nary Repeat steps			Repeat steps		
2	Periods:	Periods: 1 - 5 #12 - 14				#12 – 14						
4		CLAIMS	CLAIM_%	PAYER -	CLAIMS	CLAIM_%	ATTENDING SPECIALITY	CLAIMS	CLAIM_%	OPERATING SPECIALITY	CLAIMS	CLAIM_%
5	1	53	16.7%	(blank)	4	1.3%	(blank)	3	0.9%	(blank)	4	1.3%
6	2	67	21.1%	Blue Cross	25	7.9%	Allergy and immunology	20	6.3%	Allergy and immunology	19	6.0%
7	3	71	22.3%	CHAMPUS	1	0.3%	Anesthesiology	16	5.0%	Anesthesiology	23	7.2%
8	4	67	21.1%	Insurance Company	113	35.5%	Dermatology	21	6.6%	Dermatology	11	3.5%
9	5	60	18.9%	Medicaid	88	27.7%	Diagnostic radiology	24	7.5%	Diagnostic radiology	19	6.0%
10	TOTAL	318	100.0%	Medicare	44	13.8%	Emergency medicine	12	3.8%	Emergency medicine	15	4.7%
11				Other Federal Program	1	0.3%	Family medicine	19	6.0%	Family medicine	12	3.8%
12				Other Non-Federal Program	4	1.3%	Internal medicine	13	4.1%	Internal medicine	11	3.5%
13				Self-Pay	4	1.3%	Medical genetics	16	5.0%	Medical genetics	16	5.0%
14				Unknown	1	0.3%	Neurology	20	6.3%	Neurology	14	4.4%
15				Workers Compensation	33	10.4%	Nuclear medicine	17	5.3%	Nuclear medicine	15	4.7%
16				TOTAL	318	100.0%	Obstetrics and gynecology	17	5.3%	Obstetrics and gynecology	12	3.8%
17							Ophthalmology	12	3.8%	Ophthalmology	13	4.1%
18							Pathology	11	3.5%	Pathology	13	4.1%
19							Pediatrics	12	3.8%	Pediatrics	16	5.0%
20							Physical medicine and rehabilitatio	15	4.7%	Physical medicine and rehabilitatio	21	6.6%
21							Preventive medicine	18	5.7%	Preventive medicine	16	5.0%
22							Psychiatry	13	4.1%	Psychiatry	13	4.1%
23							Radiation oncology	11	3.5%	Radiation oncology	18	5.7%
24							Surgery	20	6.3%	Surgery	17	5.3%
25							Urology	8	2.5%	Urology	20	6.3%
26							TOTAL	318	100.0%	TOTAL	318	100.0%

15. Save your dashboard.

Security When Connecting To External Files

After saving the report and then re-opening, you will receive the following message:

! SECURITY WARNING External Data Connections have been disabled.

	Fi	ile	Home	Insert	Page La	yout	Formulas	Data	Rev	view	View	Help	Ŷ	Tell me wh
			K Cut		Calibri		- 11	• A	Ă	=	= =	87 v	ab c∉	Wrap Text
	Pas	aste 💉 Format Painter			B I	U	• 🖽 • 🕭 • 📕		<u>A</u> ~ ≡		= =	€≣ →≣	\leftrightarrow	Merge & Ce
:		Cli	pboard	L2			Font		L2			Alignn	nent	
	1	SEC	URITY WA	RNING	External D	ata Co	onnections ha	ave been o	disabl	<u>ed</u>	Enabl	e Content		
!	D1	2	Ŧ	: ×	~	f _x								
-			А		В		С		D		E	F		G
	1	W	estv	iew	Hosp	oita	al - 20	22 C)pe	era	tion	is Su	mı	mary
i	2	Perio	ds:	1	L - 5									
1	3_													;

This is okay, since you created the PivotTable and established the connection. Click the **Enable Content** button.



If you see this message and are unsure if the connection is **from a trusted source *DO NOT click* the Enable Content** button.

IMPORTANT! Never open or download files from a unknown source

Refreshing PivotTable Data

Once you have created a PivotTable and/or Dashboard with the preferred layout and formatting, you're ready to receive new data.

New information may be added to your existing PivotTable(s) either by appending or overwriting the existing data using the **Refresh** feature.

STEPS:

1. <u>When new data are available in the source file, in this example:</u> C:\Reporting\Monthly_Operations_Data.csv



2. <u>Select a cell from any of the PivotTables, then from the **PivotTable Tools: Analyze** ribbon click the **Refresh** drop-down arrow and **Refresh** <u>A</u>**I**.</u>

PivotTable Too							
PivotTable Analyze	Des	ign	Ŷ	Tell n	me what yo		
Insert Filter			hange Data		Clear		
Filter	ß	<u>R</u> efr			\mathbf{i}		
	G	Refr	esh <u>A</u> ll	-	·		
	0	Refre <u>s</u> h Status					
0.004	R	<u>C</u> an	cel Ref	resh			
ary		Connection Properties					

Refresh vs. Refresh All



The difference between selecting **Refresh** and **Refresh** <u>A</u>**II** is **Refresh** only updates the *active* PivotTable. By selecting **Refresh** <u>A</u>**II** we're updating all of the PivotTables in the dashboard.

	A	В	C I	E	F		G	н і	J	К	L M	N	0
1	West	view		al - 2022 Op	peratio	ns S	Sumn	nary					
2	Periods:	1 - 12		emember to update				-					i
3	- choust			eriod to the correct	months								
4	MONTH -	CLAIMS	CLAIM %	PAYER	👻 CLAI	MS CI	LAIM_%	ATTENDING SPECIALITY	CLAIMS	CLAIM %	OPERATING SPECIALITY	CLAIMS	CLAIM %
5	1	53	7.3%	(blank)		5	0.7%	(blank)	7	1.0%	(blank)	5	0.7%
6	2	67	9.2%	Blue Cross		59	8.1%	Allergy and immunology	35	4.8%	Allergy and immunology	37	5.1%
7	3	71	9.7%			4	0.5%	Anesthesiology	36	4.9%	Anesthesiology	40	5.5%
8	4	67	67 9.2% Insurance Company		2	63	36.0%	Dermatology	55	7.5%	Dermatology	33	4.5%
9	5	60-	08-2% - Medicaid			97	26.9%	Diagnostic radiology	40	5.5%	Diagnostic radiology	37	5.1%
10	6	66	9.0%	Medicare	1	10	15.0%	Emergency medicine	32	4.4%	Emergency medicine	42	5.7%
111	7	63	8.6%	Other Federal Progra	am	3	0.4%	Family medicine	43	5.9%	Family medicine	42	5.7%
12	8	49	6.7%	Other Non-Federal P	rogram	5	0.7%	Internal medicine	22	3.0%	Internal medicine	37	5.1%
13	9	57	7.8%	Self-Pay		8	1.1%	Medical genetics	38	5.2%	Medical genetics	35	4.8%
14	10	59	8.1%	Unknown		5	0.7%	Neurology	38	5.2%	Neurology	40	5.5%
15	11	58	7.9%	Workers Compensat	ion	71	9.7%	Nuclear medicine	37	5.1%	Nuclear medicine	34	4.7%
16	12	61	8.3%	Workers' Compensa	tion	1	0.1%	Obstetrics and gynecology	40	5.5%	Obstetrics and gynecology	22	3.0%
171	TOTAL	731	100.0%	TOTAL		31	100.0%	Ophthalmology	25	3.4%	Ophthalmology	35	4.8%
18								Pathology	32	4.4%	Pathology	30	4.1%
19								Pediatrics	37	5.1%	Pediatrics	38	5.2%
20								Physical medicine and rehabilitation	34	4.7%	Physical medicine and rehabilitation	42	5.7%
21								Preventive medicine	38	5.2%	Preventive medicine	28	3.8%
22								Psychiatry	28	3.8%	Psychiatry	36	4.9%
23		New D	ata Addeo					Radiation oncology	30	4.1%	Radiation oncology	44	6.0%
24				-				Surgery	45	6.2%	Surgery	34	4.7%
25								Urology	39	5.3%	Urology	40	5.5%
26								TOTAL	731	100.0%	TOTAL	731	100.0%

SUPPORT:

Please email planningsupport@datagen.info with any questions.