



A subsidiary of
Healthcare Association of New York State[®]

Microsoft Excel[®] v2016 PivotTable Training Version 1
2022

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TABLE OF CONTENTS

SECTION 1	1
<i>Introduction to PivotTable Reporting</i>	1
What Are PivotTables?	1
What Are the Main Parts of a PivotTable?	2
Preparing the Worksheet for Reporting	3
SECTION 2	4
<i>Importing .CSV Files (Part 1)</i>	4
Report Output From The DataGen® Planning Application	4
SECTION 3	6
<i>Basic PivotTable Reporting and Formatting</i>	6
What Are the Total Number of Claims by Year?	6
Value Field Settings	9
Changing Column and Row Text Labels	10
PivotTable Styles	11
Filtering Out Blank Rows and Columns	11
SECTION 4	12
<i>Extending Pivottable Functionality With Subtotals and Filtering</i>	12
What Are the Total Claim Counts by Month, Quarter and Year?	12
How Do I Filter My Results by Facility and Year?	13
Report Filters	16
Label Filtering Within a Result Set	17
SECTION 5	20
<i>Frequency Reporting</i>	20
What Are the Most Frequently Used Dxcode1 Values?	20
Filtering for the Top 10 Dxcode1 Values	22
Sorting PivotTable Results	23
What Are the Top 10 Dxcode1 and Corresponding Treatment (CPTCode1) Codes?	24
Tabular Form Report Layout	24
SECTION 6	26
<i>PivotTable Dashboard Example and Importing .CSV Files (Part 2)</i>	26
What is a Dashboard?	26
Dashboard Design	26
A Basic Operations Monthly Dashboard	27
Importing .CSV Files (Part 2)	28
Multiple PivotTable Reports on a Single Worksheet	32
Displaying Percentages in PivotTables	33
Security When Connecting to External Files	37
Refreshing PivotTable Data	37
Refresh vs. Refresh All	38

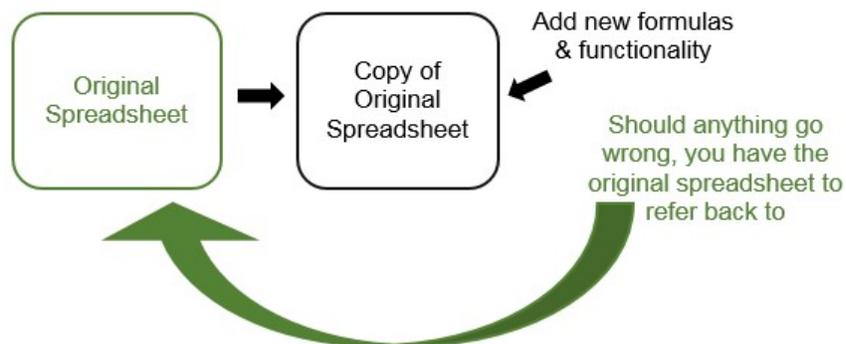
SECTION 1

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.**

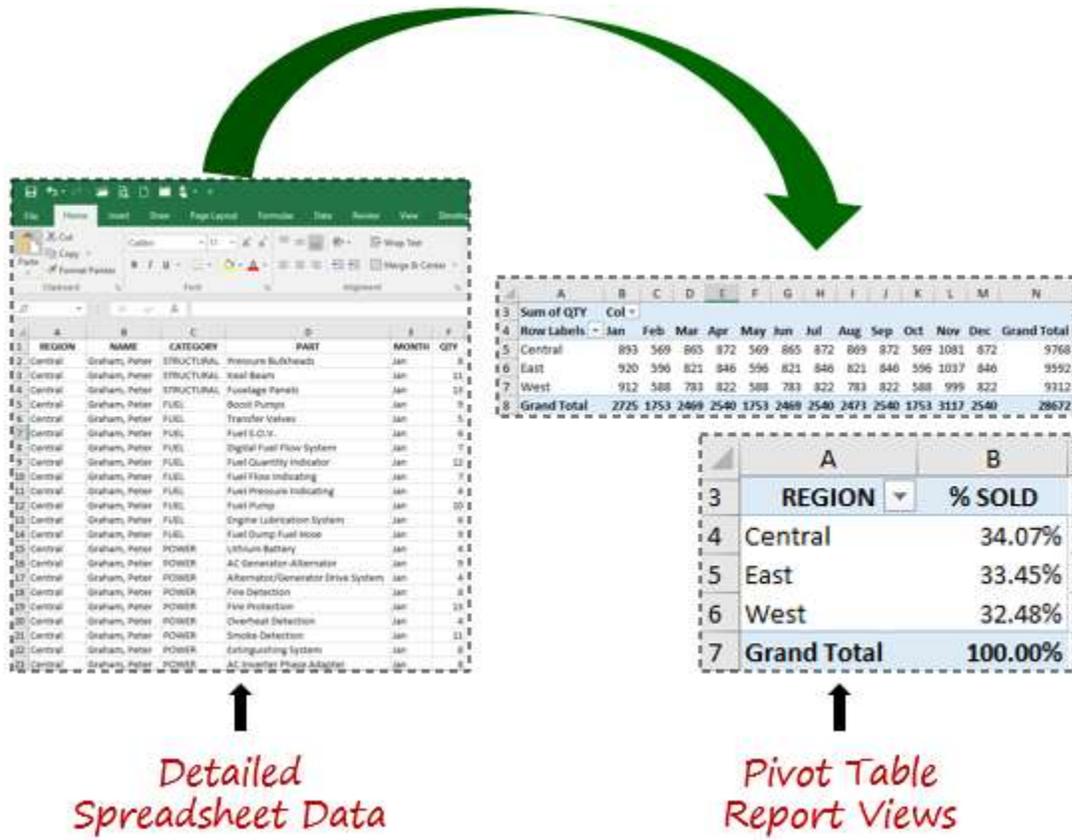
Please always back up your work and save often. A good best practice when attempting any new functionality is to create a copy of the original spreadsheet and implement your changes on the copied spreadsheet. Should anything go wrong, you can refer back to the original spreadsheet. See the diagram below.



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.

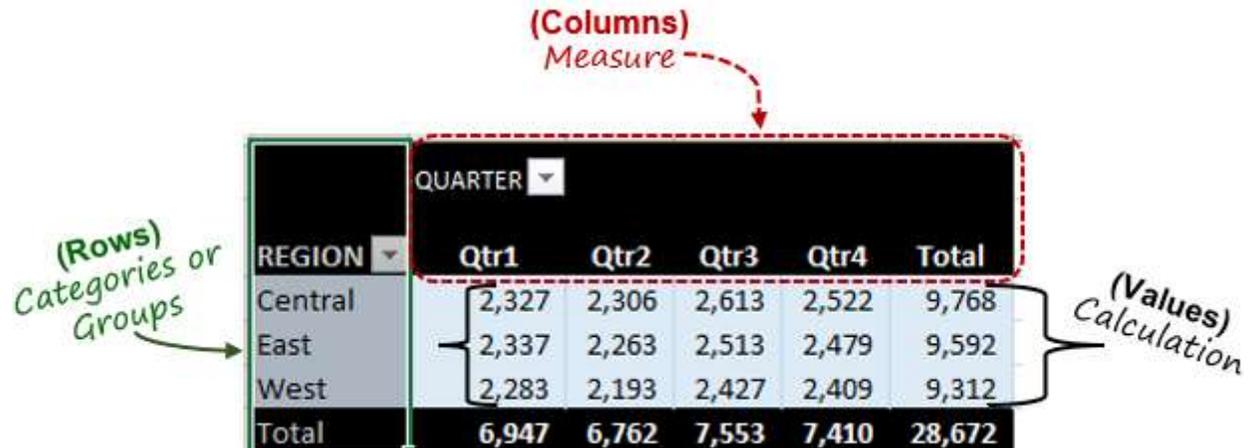
By using built-in functions and filters, PivotTables allow you to quickly organize and summarize large amounts of data. You can filter and drill down for more detailed examination of your numbers and various types of analysis may be completed without the need to manually enter formulas into the spreadsheet you're [analyzing](#)^[CP1]_[NM2].



WHAT ARE THE MAIN PARTS OF A PIVOTTABLE?

There are three main components of a PivotTable:

- Rows:** The rows section typically represents how you would like to category or group your data. Examples include: employee name, region, department, part number, item, etc.
- Columns:** The columns show the measure 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.
- 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 [next section](#). 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**.

For example:

Incorrect 🚫

Blank rows Subtotals

	A	B	C	D	E	F	G
1							2019
2	Institution	County	DRG_Service Line	DRG	DRG Description	Primary Payor	
3	Hospital 1	Bannock, ID	Cardiology - Medical	282	Acute Myocardial I	OTHER GOVERNMENT	1
4	Hospital 1	Bannock, ID	Orthopedics - Surgical	470	Major Hip and Knee	MEDICAID HMO	2
5	Hospital 1	Bannock, ID	Orthopedics - Surgical	483	Major Joint and Lim	WORKERS COMPENSATION	1
6	Hospital 1	Bannock, ID	Orthopedics - Surgical Total				3
7	Hospital 1	Bannock, ID	Psychiatry	885	Psychoses	WORKERS COMPENSATION	1
8	Hospital 1	Bannock, ID	Pulmonology	205	Other Respiratory S	MEDICAID HMO	1
9	Hospital 1	Bannock, ID	Spine	460	Spinal Fusion Excep	MEDICARE	1
10	Hospital 1	Bannock, ID	Urology - Surgical	670	Transurethral Proce	OTHER GOVERNMENT	1
11	Hospital 1	Bannock, ID Total					8
8191	Grand Total						73,931
8192							
8193	Data Citations						
8194							
8195	Please note that when you download and store your data, you must also store this citation in the same location. Analyses based on this data						
8196							
8197	CPT® copyright 2019 American Medical Association. All rights reserved.						
8198							
8199	Field Names						
8200							
8201	Measures						

Footer

Correct 👍

No blank rows or columns No Subtotals

	A	B	C	D	E	F	G
1	Institution	County	DRG_Service Line	DRG	DRG Description	Primary Payor	2019
2	Hospital 1	Bannock, ID	Cardiology - Medical	282	Acute Myocardial Infarction	OTHER GOVERNMENT	1
3	Hospital 1	Bannock, ID	Orthopedics - Surgical	470	Major Hip and Knee Joint Re	MEDICAID HMO	2
4	Hospital 1	Bannock, ID	Orthopedics - Surgical	483	Major Joint and Limb Reatta	WORKERS COMPENSATION	1
5	Hospital 1	Bannock, ID	Psychiatry	885	Psychoses	WORKERS COMPENSATION	1
6	Hospital 1	Bannock, ID	Pulmonology	205	Other Respiratory System D	MEDICAID HMO	1
7	Hospital 1	Bannock, ID	Spine	460	Spinal Fusion Except Cervica	MEDICARE	1
8	Hospital 1	Bannock, ID	Urology - Surgical	670	Transurethral Procedures w	OTHER GOVERNMENT	1
86378	Hospital Def	Twin Falls, ID	Vascular Services - Surg	253	Other Vascular Procedures v	SELF PAY	1
86379							
86380		No Footer					
86381							

SECTION 2

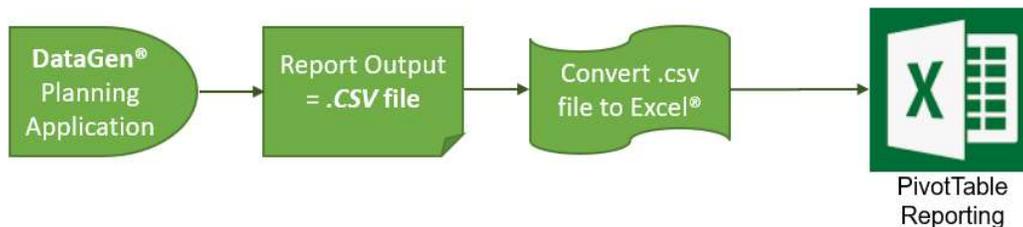
IMPORTING .CSV FILES (PART 1)

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.

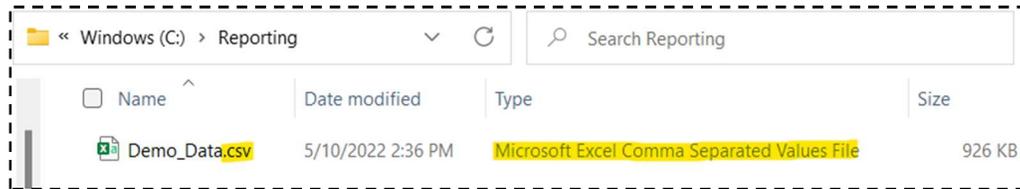
SAMPLE DATA:

Due to space limitations the entire .CSV file is not displayed.

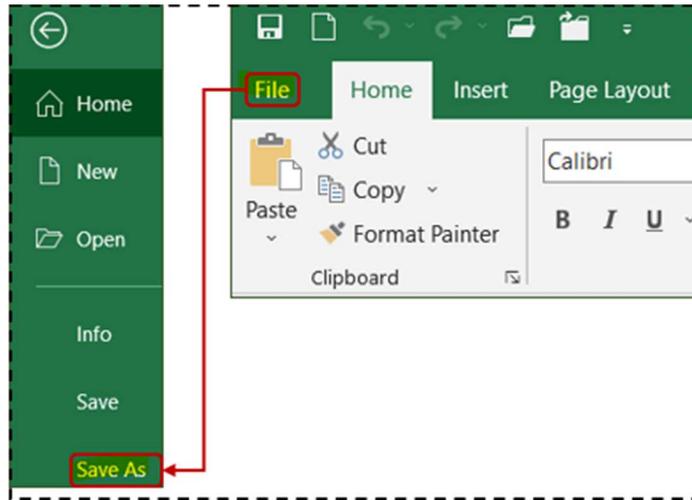
	A	B	C	D	E	F	G	H	I	J	K
1	Claim_ID	Visit_Year	Visit_Mon	Visit_Quar	Facility_ID	Facility	Facility_Cc	Facility_St	Payor_Cat	Payor_Cat	Detail_Pay
2	4725043	2020	5	2	62	Tulip Gene Garland	NY		4	Insurance	22
3	1692982	2020	9	3	47	Westview Houston	NY		3	Blue Cross	13
4	2122703	2020	11	4	3	Clearwater Aurora	NY		1	Insurance	24
5	2776092	2020	9	3	30	Grand Plain Kansas	NY		15	Medicare	8
6	216227	2018	6	2	25	Ruby Valle Virginia Be	NY		2	Insurance	21
7	216243	2019	2	1	10	Kindred So Columbus	NY		14	Insurance	9

STEPS TO COMPLETE EXAMPLE:

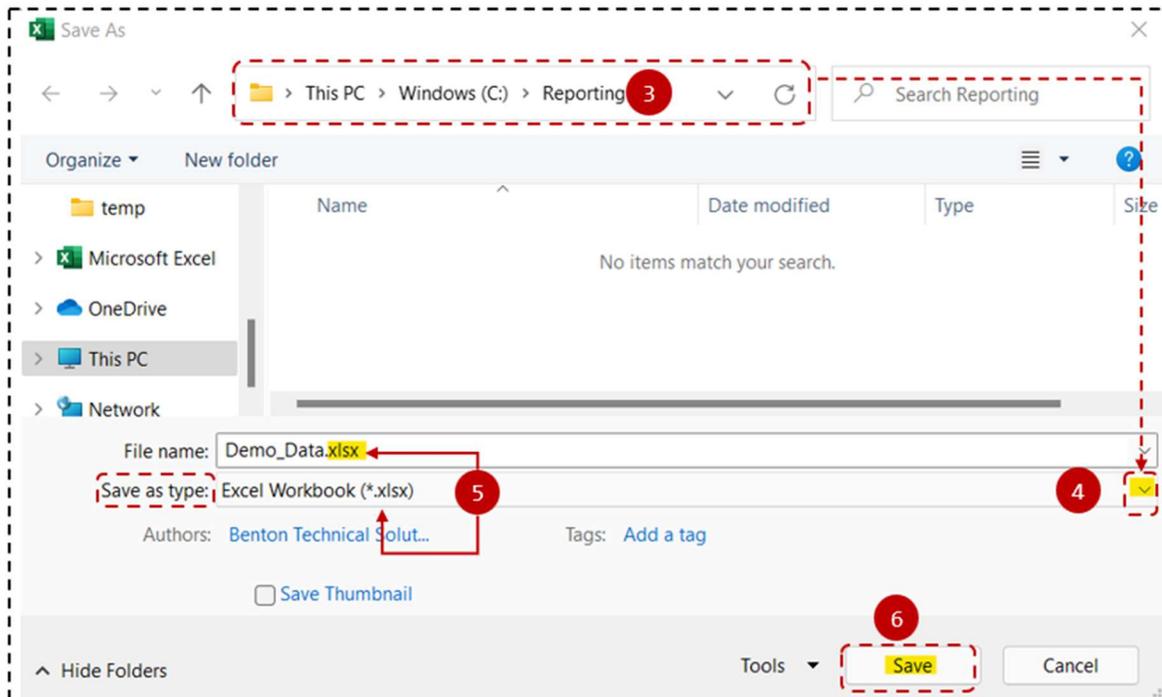
1. Open the .CSV file; note the **Type** is **Microsoft Excel Comma Separated Values File**.



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.



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:

- Claim_ID
- Visit_Year

Due to space limitations the entire Excel file is not displayed:

	A	B	C	D	E	F	G	H	W	X	Y
	Claim_ID	Visit_Year	Visit_Month	Visit_Quarter	Facility_ID	Facility	Facility_County	Facility_State	Patient_Ethnicity_Detail	Patient_Age	Patient_Age_Category
2	4725043	2020	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	2020	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	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 Hospital	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
83739	5003931	2020	1	1	34	Stillwater Medical Center	Grand Rapids	NY	Other Spanish/Hispanic Origin	55	55-59
83740	5004087	2020	12	4	45	Rosewood Medical Center	Portland	NY	Unknown	46	45-49
83741											
83742											

STEPS TO COMPLETE EXAMPLE:

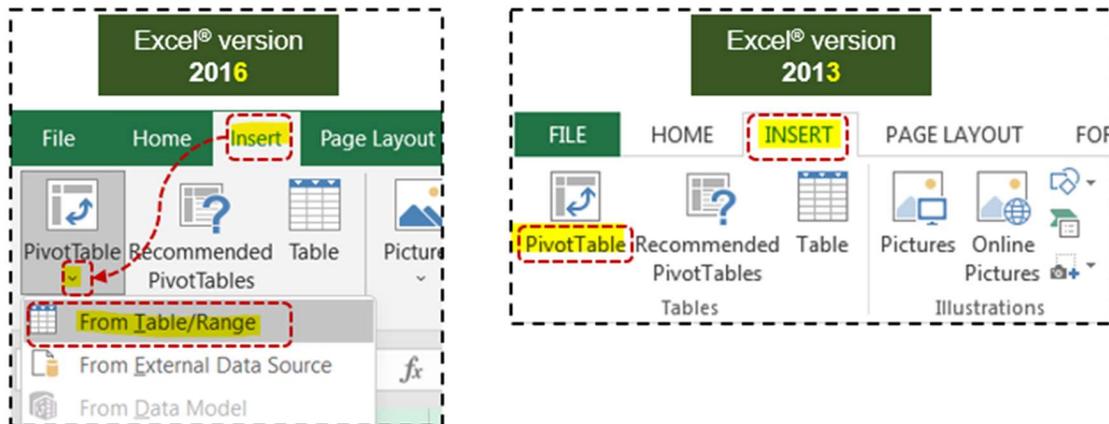
To determine the **Total Count of Claims by Year**:

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

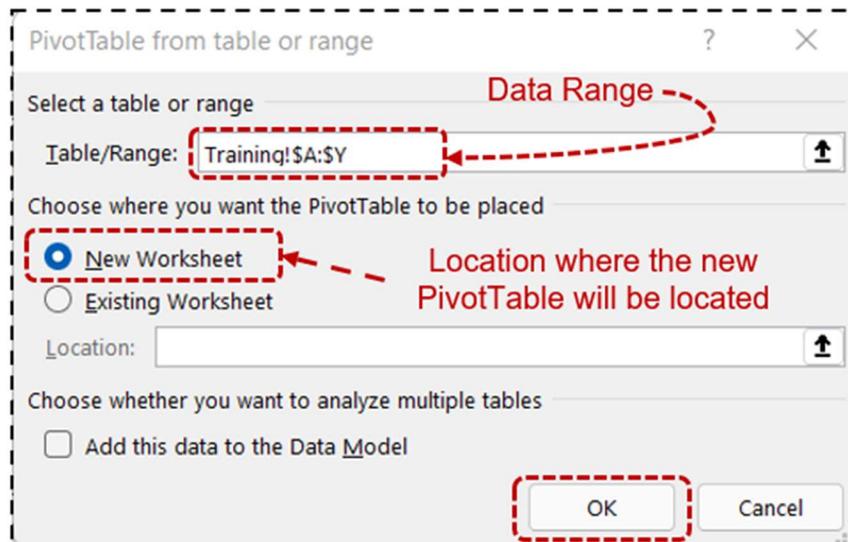
Select columns A:Y (image truncated)

	A	B	C	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**

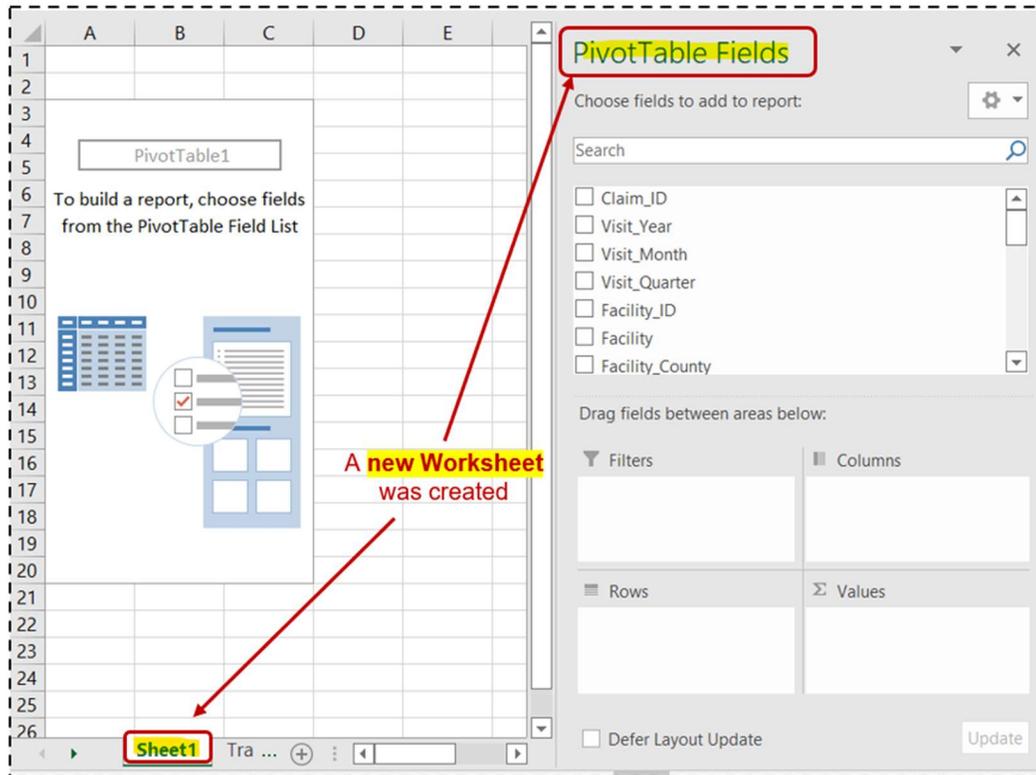


A similar dialogue box will appear. Note the **Data Range** and **location where the new PivotTable will be located**:



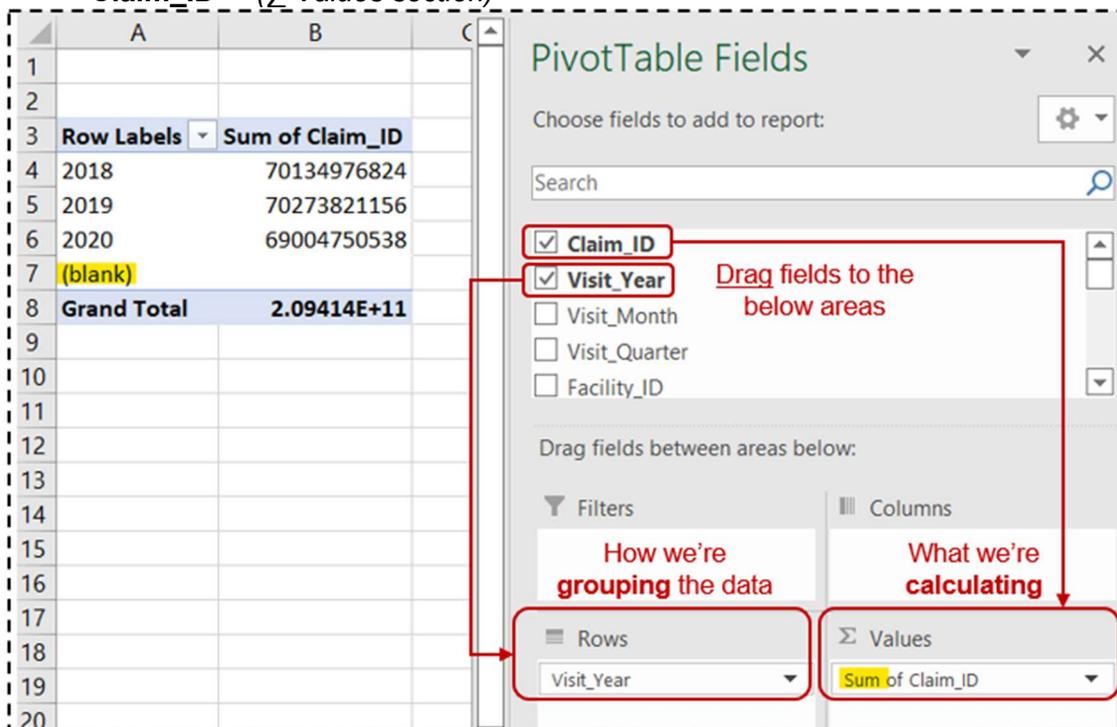
4. Click **OK**.

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.



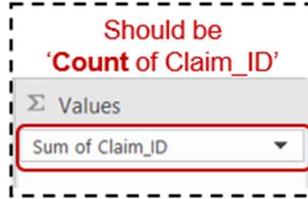
Next, we'll **categorize** our report and select a **calculation** value.

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



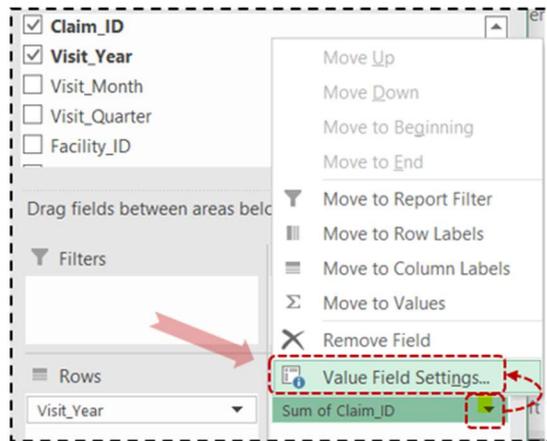
VALUE FIELD SETTINGS

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



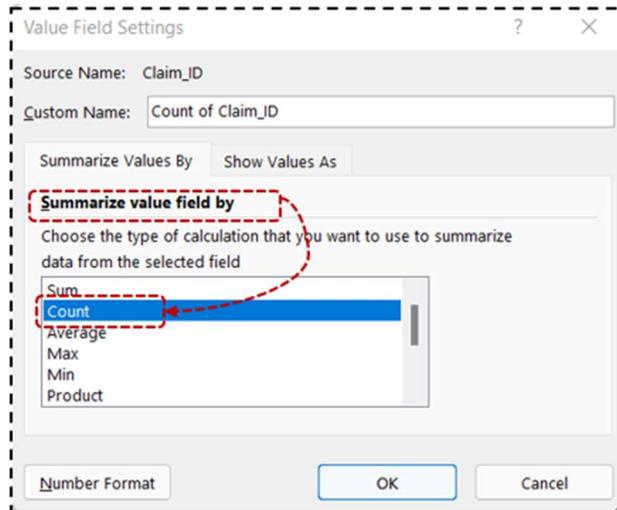
To change the Σ **Values** section from **sum** to **count**:

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

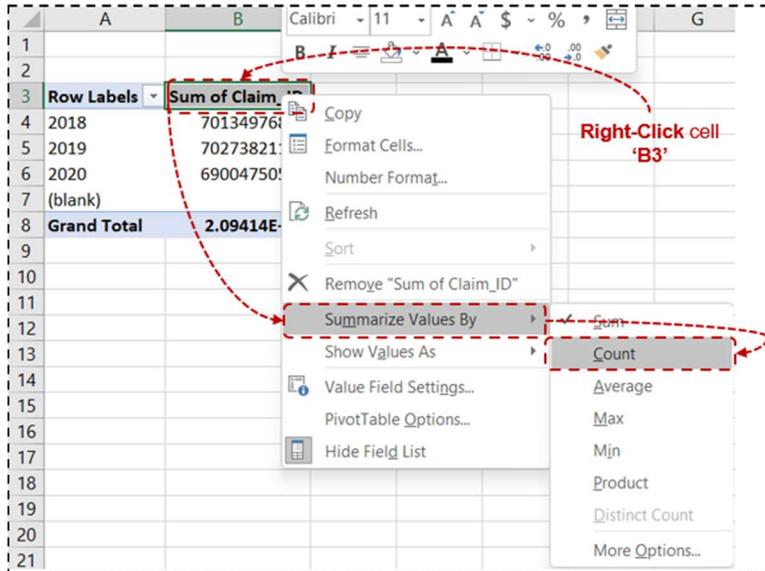


The following **Value Field Settings...** dialogue box will appear:

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



Alternatively, you may *right-click* cell **B3** and from the sub-menu select **Summarize Values By** and then the **Count** option.



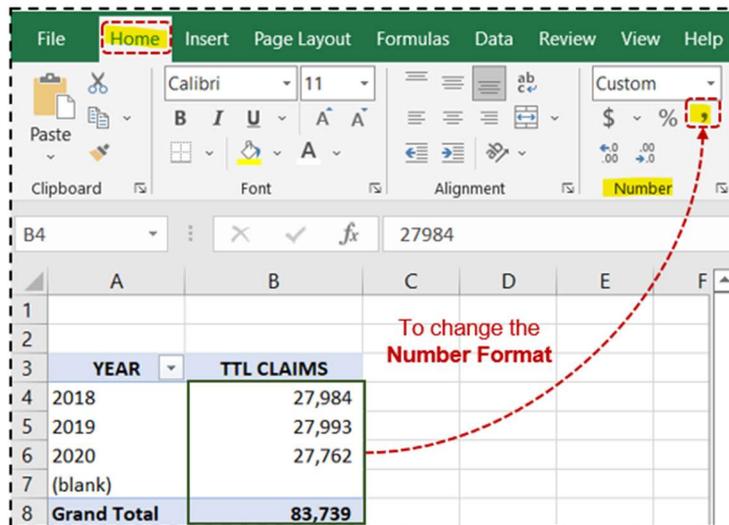
CHANGING COLUMN AND ROW TEXT LABELS

A PivotTable will be on the right side of your screen. *Note: the format is difficult to read.*

Row Labels	Sum of Claim_ID
2018	70134976
2019	70273821
2020	69004750
(blank)	
Grand Total	2.09414E+08

1. To change the column names and format of the numbers:

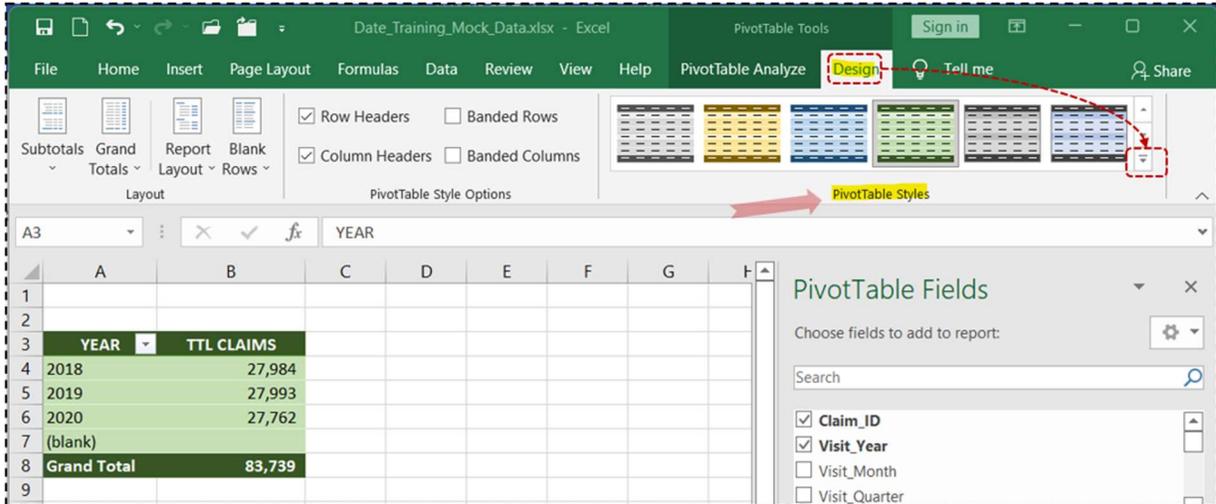
- Select cell **A3** and change the text from **Row Labels** to **YEAR**.
- Select cell **B3** and change the text from **Count of Claim_ID** to **TTL CLAIMS**.
- You may also change the number format in cells **B4:B8**. In the below example, the format was changed to **Comma Style** with zero decimal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



PIVOTTABLE STYLES

To change the format (style) of a PivotTable:

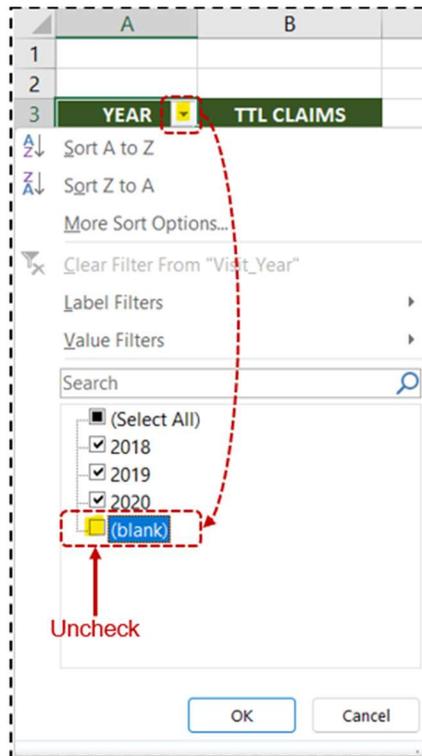
1. Select cell **A3** and from the **PivotTable Tools: Design** ribbon, select the **PivotTable Styles** drop-down arrow.
2. Select a style (format) of your liking.



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:

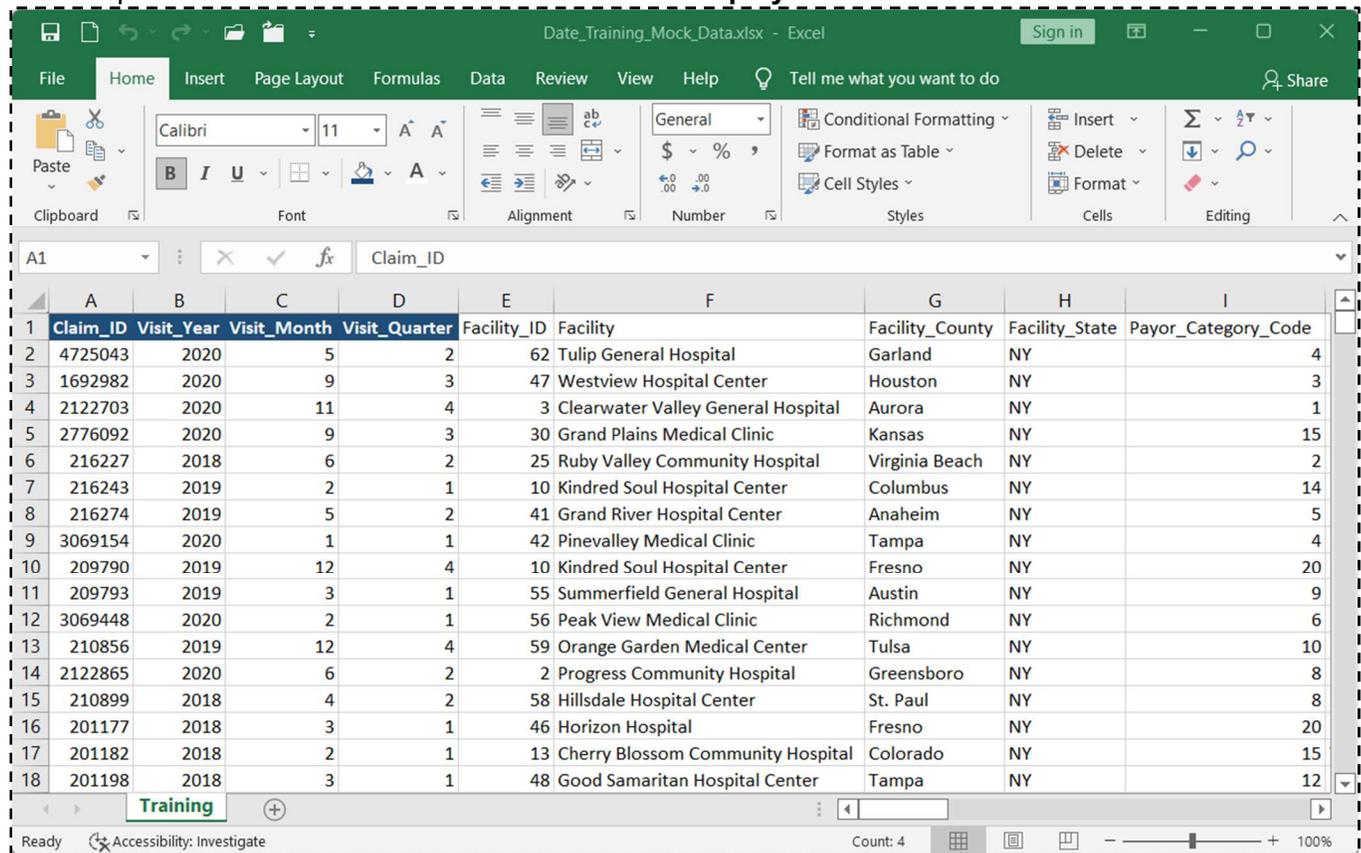
Create a report displaying each month's total number of claims, *subtotaled* by quarter, with an annual grand total.

SAMPLE DATA:

Fields used in this exercise:

- Claim_ID
- Visit_Year
- Visit_Month
- Visit_Quarter

Due to space limitations **the entire Excel file is not displayed:**



Claim_ID	Visit_Year	Visit_Month	Visit_Quarter	Facility_ID	Facility	Facility_County	Facility_State	Payor_Category_Code
4725043	2020	5	2	62	Tulip General Hospital	Garland	NY	4
1692982	2020	9	3	47	Westview Hospital Center	Houston	NY	3
2122703	2020	11	4	3	Clearwater Valley General Hospital	Aurora	NY	1
2776092	2020	9	3	30	Grand Plains Medical Clinic	Kansas	NY	15
216227	2018	6	2	25	Ruby Valley Community Hospital	Virginia Beach	NY	2
216243	2019	2	1	10	Kindred Soul Hospital Center	Columbus	NY	14
216274	2019	5	2	41	Grand River Hospital Center	Anaheim	NY	5
3069154	2020	1	1	42	Pinevalley Medical Clinic	Tampa	NY	4
209790	2019	12	4	10	Kindred Soul Hospital Center	Fresno	NY	20
209793	2019	3	1	55	Summerfield General Hospital	Austin	NY	9
3069448	2020	2	1	56	Peak View Medical Clinic	Richmond	NY	6
210856	2019	12	4	59	Orange Garden Medical Center	Tulsa	NY	10
2122865	2020	6	2	2	Progress Community Hospital	Greensboro	NY	8
210899	2018	4	2	58	Hillsdale Hospital Center	St. Paul	NY	8
201177	2018	3	1	46	Horizon Hospital	Fresno	NY	20
201182	2018	2	1	13	Cherry Blossom Community Hospital	Colorado	NY	15
201198	2018	3	1	48	Good Samaritan Hospital Center	Tampa	NY	12

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 column order 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** (Σ Values section)

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**.

	TTL CLAIMS Column Labels																
YEAR	1			2			3			4			Grand Total				
2018	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
2019	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
2020	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
Grand 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	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:

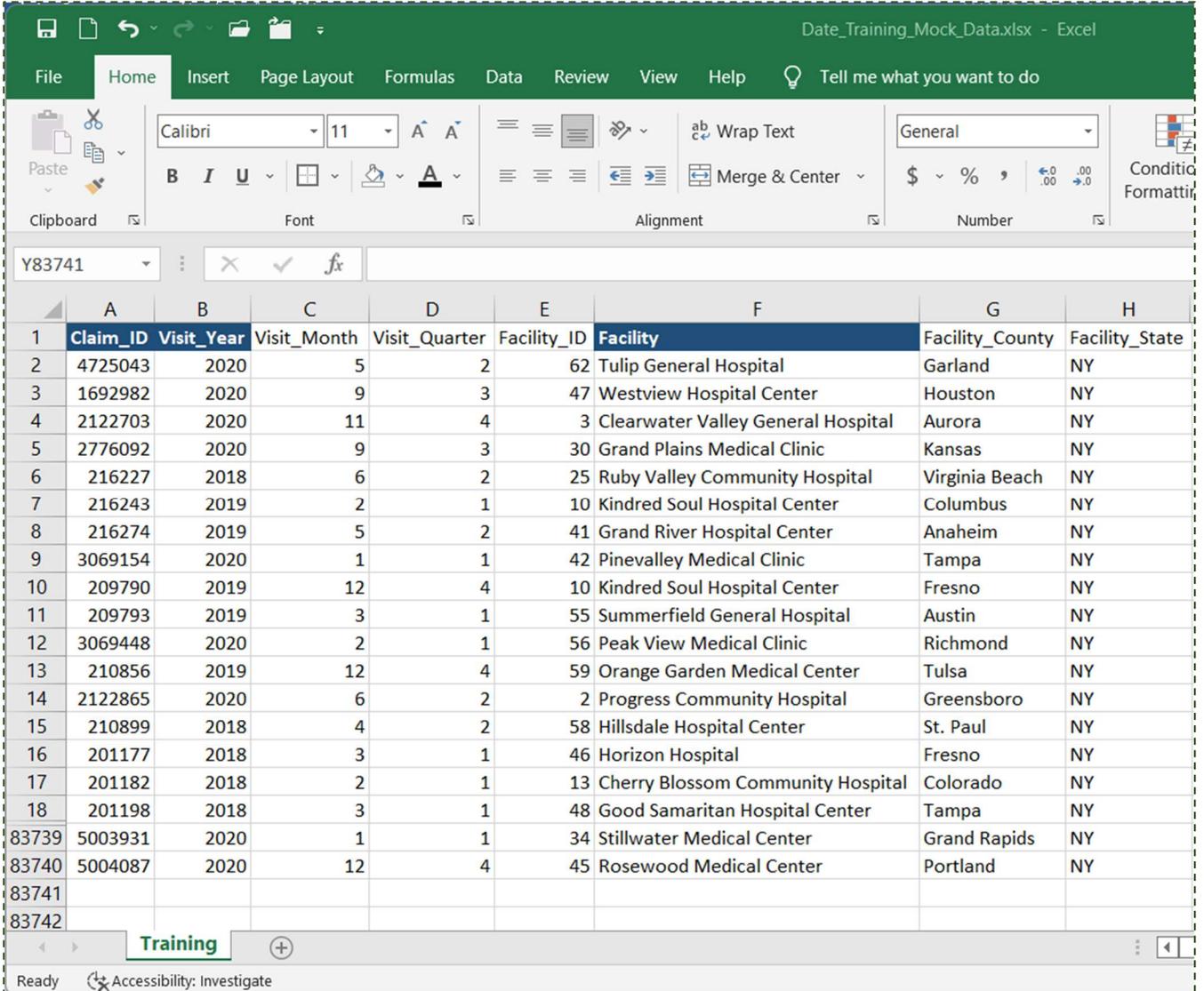
Create a report allowing a user to review only claims related to a specific facility or facilities, by a single year.

SAMPLE DATA:

Fields used in this exercise:

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

Due to space limitations the entire Excel file is not displayed:



The screenshot shows the Microsoft Excel interface with the following data table displayed:

	A	B	C	D	E	F	G	H
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 Hospital	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								

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** (Σ Values section)

Count of Claim_ID	Column Labels												Grand Total
Row Labels	1	2	3	4	5	6	7	8	9	10	11	12 (blank)	
Alliance General Hospital	92	90	91	125	92	109	90	101	101	96	101	118	1206
Amity Medical Clinic	111	100	101	100	102	110	108	112	104	82	110	103	1243
Angelvale Hospital Center	99	109	90	107	102	103	81	100	107	102	100	122	1222
Angelvale Medical Center	98	113	113	125	104	100	119	94	91	113	104	99	1273
Big Heart Hospital	105	107	114	105	103	100	86	97	121	98	116	101	1253
Blossomvale Hospital	121	119	87	121	98	117	137	109	91	108	106	96	1310
Cherry Blossom Community Hospital	102	88	109	125	94	89	98	120	81	96	107	107	1216
Clearwater Valley General Hospital	106	107	95	106	111	96	108	87	85	110	105	107	1223
Clemency General Hospital	111	111	78	91	98	108	112	84	104	90	92	102	1181
Desert Springs Hospital Center	94	114	108	103	86	104	74	92	86	104	119	117	1201
Diamond Grove Medical Center	100	113	114	112	111	86	102	100	107	102	102	89	1238
Fairview Hospital	106	92	92	110	94	120	103	93	94	95	95	117	1211
Flowerhill Community Hospital	102	98	91	90	116	104	114	89	100	98	111	105	1218
Genesis Hospital Center	99	105	114	114	98	114	114	107	98	93	88	98	1242
Good Samaritan Hospital Center	85	82	97	96	96	98	112	94	92	89	99	95	1135
Grace Medical Clinic	87	102	100	107	118	101	94	100	89	103	103	104	1208
Grand Meadow Medical Clinic	92	103	126	91	86	79	98	105	91	90	113	89	1163
Grand Plains Medical Clinic	105	110	98	88	100	102	97	103	101	96	109	105	1214

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**.

		Monthly Values Centered													
	COUNT OF CLAIMS	MONTH													
	FACILITY	1	2	3	4	5	6	7	8	9	10	11	12	TTL	
	Alliance General Hospital	92	90	91	125	92	109	90	101	101	96	101	118	1,206	
	Amity Medical Clinic	111	100	101	100	102	110	108	112	104	82	110	103	1,243	
	Angelvale Hospital Center	99	109	90	107	102	103	81	100	107	102	100	122	1,222	
	Angelvale Medical Center	98	113	113	125	104	100	119	94	91	113	104	99	1,273	
	Big Heart Hospital	105	107	114	105	103	100	86	97	121	98	116	101	1,253	
	Blossomvale Hospital	121	119	87	121	98	117	137	109	91	108	106	96	1,310	
	Cherry Blossom Community Hospital	102	88	109	125	94	89	98	120	81	96	107	107	1,216	

REPORT FILTERS

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

The screenshot shows a PivotTable with the following data:

Visit_Year	(All)				
COUNT OF CLAIMS	MONTH				
FACILITY	1	2	3	4	5
Alliance General Hospital	92	90	91	125	9
Amity Medical Clinic	111	100	101	100	10
Angelvale Hospital Center	99	109	90	107	10
Angelvale Medical Center	98	113	113	125	10
Big Heart Hospital	105	107	114	105	10
Blossomvale Hospital	121	119	87	121	9
Cherry Blossom Community Hospital	102	88	109	125	9
Clearwater Valley General Hospital	106	107	95	106	11
Clemency General Hospital	111	111	78	91	9
Desert Springs Hospital Center	94	114	108	103	8
Diamond Grove Medical Center	100	113	114	112	11
Fairview Hospital	106	92	92	110	9
Flowerhill Community Hospital	102	98	91	90	11
Genesis Hospital Center	99	105	114	114	9
Good Samaritan Hospital Center	85	82	97	96	9
Grace Medical Clinic	87	102	100	107	11

The PivotTable Fields task pane on the right shows the following configuration:

- Fields list:** Claim_ID (checked), Visit_Year (checked), Visit_Month (checked), Visit_Quarter (unchecked), Facility_ID (unchecked), Facility (checked).
- Filters:** Visit_Year
- Columns:** Visit_Month
- Rows:** Facility
- Values:** COUNT OF CLAIMS

A red dashed box highlights the 'Visit_Year' field in the Fields list and its position in the Filters section. A red arrow points from the field name to the Filters section with the text: "Drag the field 'Visit_Year' to the 'Filters' section".

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**.

The screenshot shows the 'Filter by Selection' dialog box for the 'FACILITY' field. The dialog includes the following elements:

- Sort options:** Sort A to Z, Sort Z to A, More Sort Options...
- Clear Filter From "Facility"** button.
- Label Filters** and **Value Filters** sections.
- Search** box.
- Facility list:** A list of facilities with checkboxes. The '(Select All)' checkbox is unchecked. The following facilities are checked: Angelvale Hospital Center, Angelvale Medical Center, Big Heart Hospital, Blossomvale Hospital, Cherry Blossom Community Hospital, Clearwater Valley General Hospital, and Clemency General Hospital.
- OK** and **Cancel** buttons.

A red dashed box highlights the '(Select All)' checkbox with the text: "uncheck the box (Select All)".

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	YEAR	2020												
2														
3	COUNT OF CLAIMS	MONTH												
4	FACILITY	1	2	3	4	5	6	7	8	9	10	11	12	TTL
5	Angelvale Hospital Center	38	33	34	33	29	31	23	24	39	30	28	38	380
6	Angelvale Medical Center	33	35	35	44	36	40	46	38	26	33	33	23	422
7	TTL	71	68	69	77	65	71	69	62	65	63	61	61	802

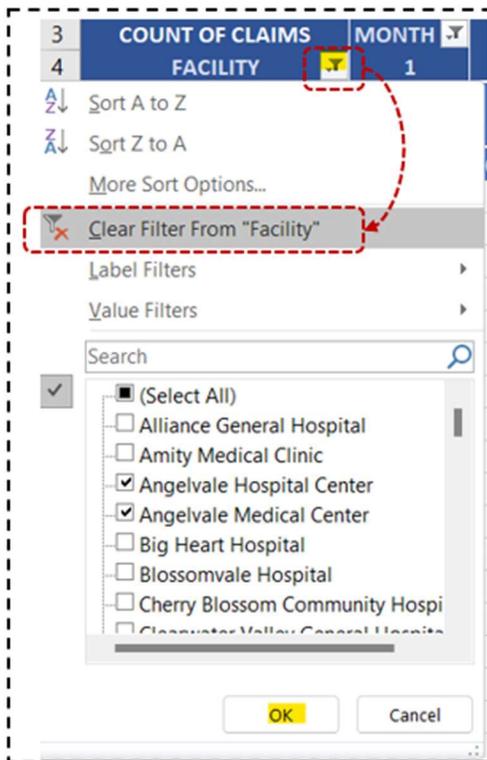
LABEL FILTERING WITHIN A RESULT SET

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.

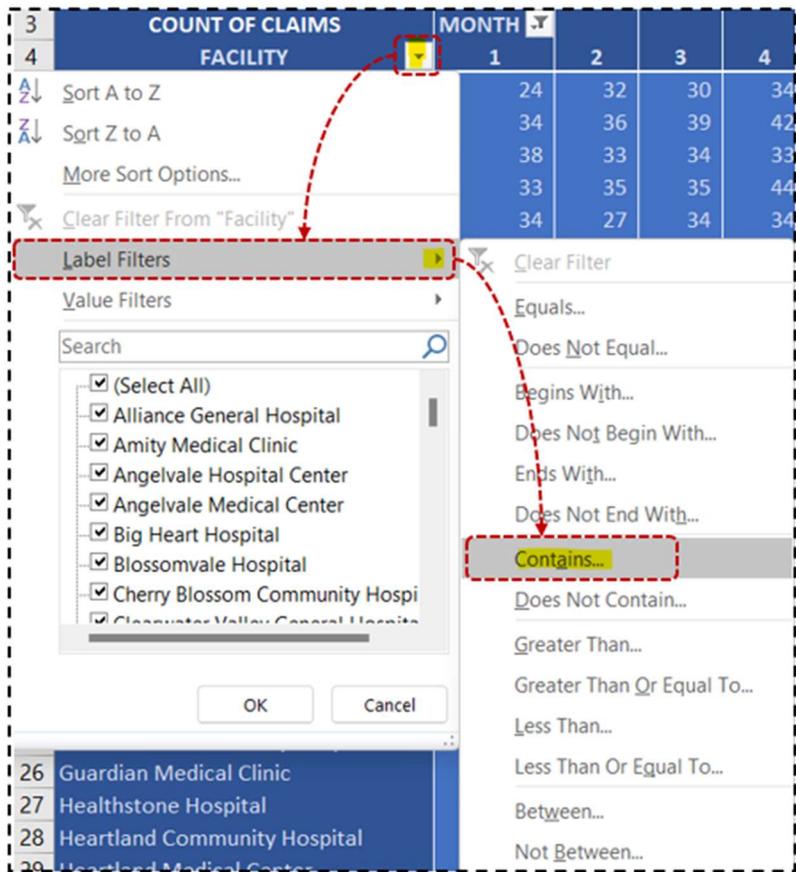
EXAMPLE:

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

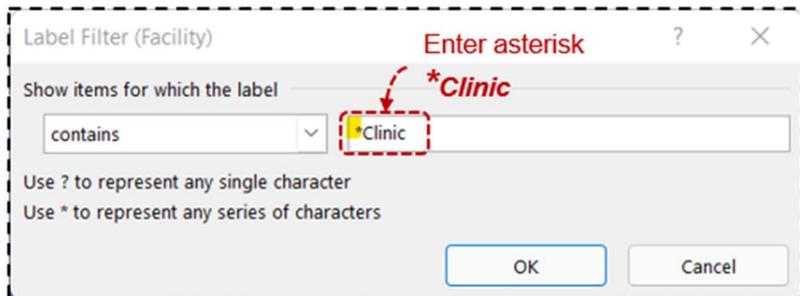
1. Remove the previous filter by selecting the drop-down arrow in cell **A4** and then **Clear Filter From "Facility"**



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



3. When prompted, enter ***Clinic**.



4. Click **OK**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	YEAR	2020												
2														
3	COUNT OF CLAIMS	MONTH												
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	TTL	503	503	524	490	476	512	495	537	511	490	530	514	6,085

Claim counts for all facilities with 'Clinic' in the name for the Year 2020

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:

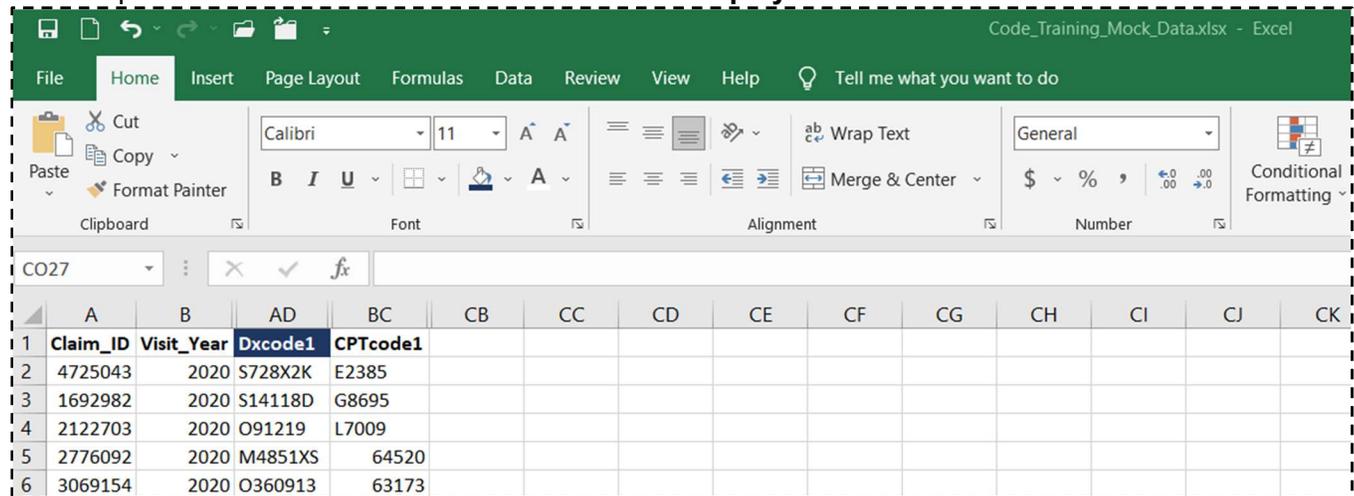
Create a report displaying the Top 10 Dxcodes1 Values.

SAMPLE DATA:

Field used in this exercise:

- Dxcodes1

Due to space limitations the entire Excel file is not displayed:



The screenshot shows an Excel spreadsheet with the following data:

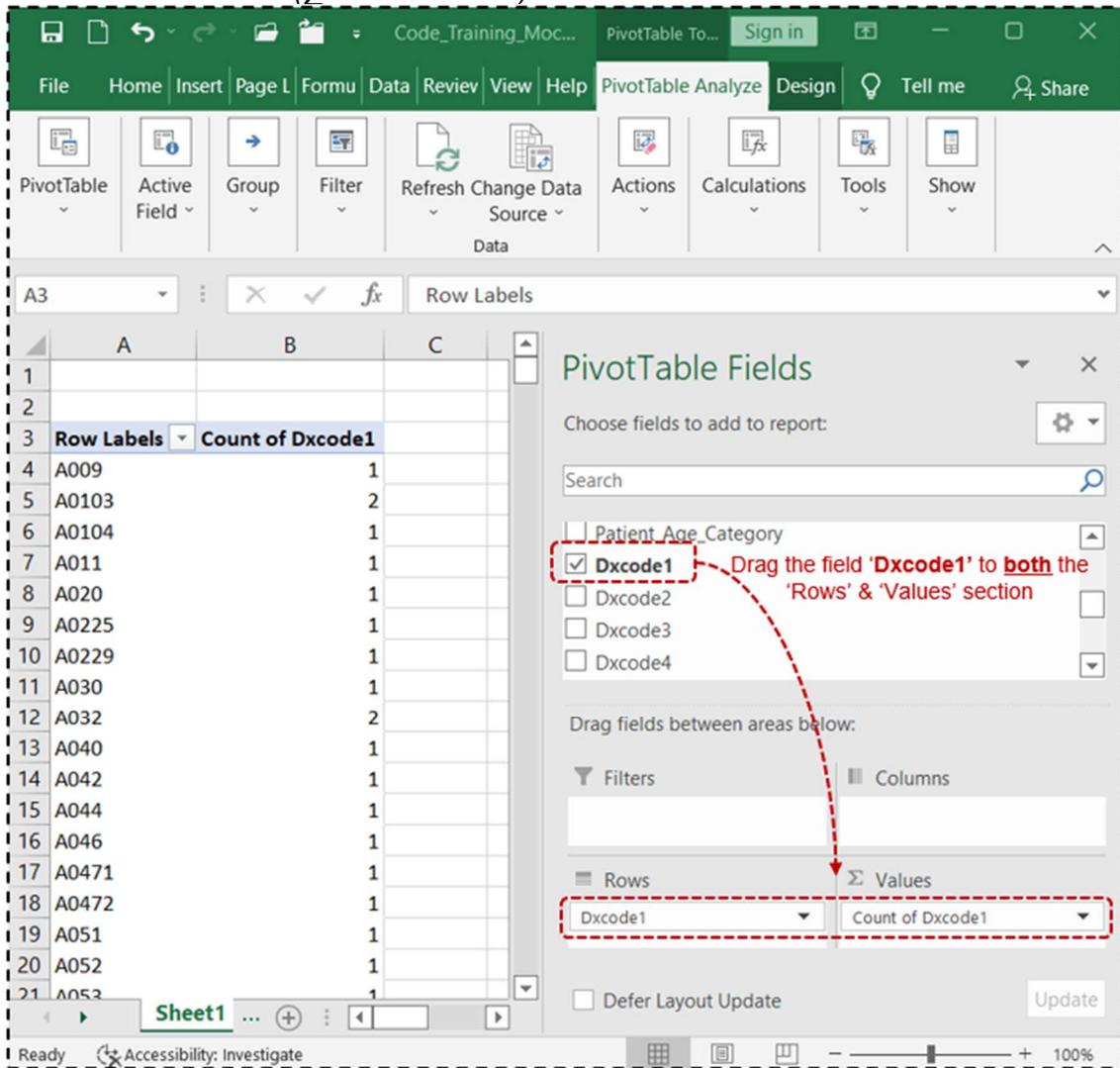
	A	B	AD	BC	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK
1	Claim_ID	Visit_Year	Dxcodes1	CPTcode1										
2	4725043	2020	S728X2K	E2385										
3	1692982	2020	S14118D	G8695										
4	2122703	2020	O91219	L7009										
5	2776092	2020	M4851XS	64520										
6	3069154	2020	O360913	63173										

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. Note: Drag the **Dxcode1** field to **both** the **Rows** and **Values** sections.

5. In the **PivotTable Fields** pane select the following fields:
 - **Dxcode1** (Rows section)
 - **Dxcode1** (Σ Values section)



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**.

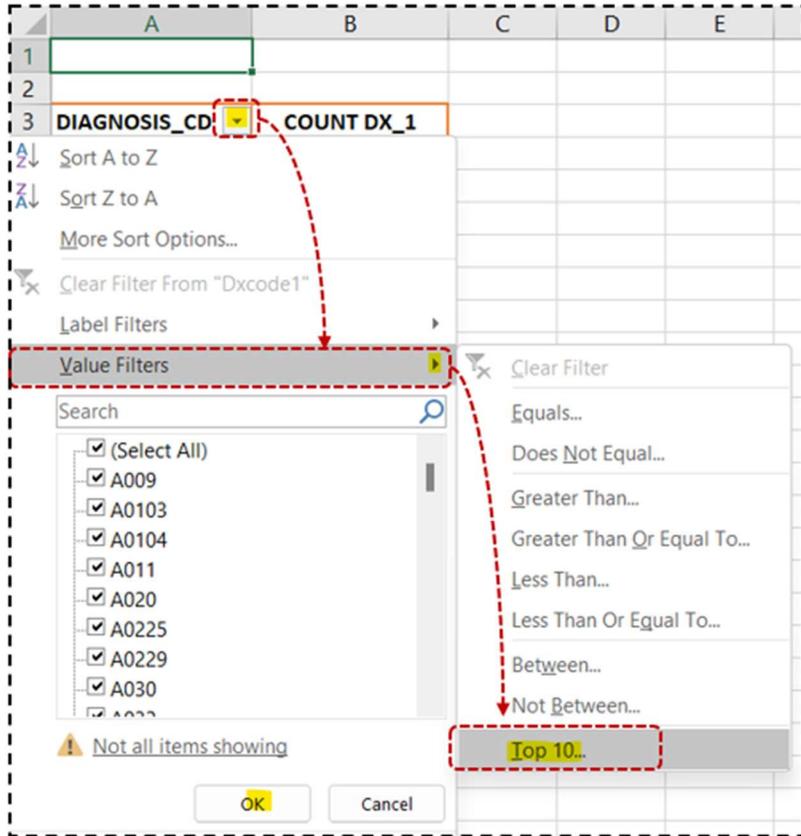
	A	B
1		
2		
3	DIAGNOSIS_CD	COUNT DX_1
4	A009	1
5	A0103	2
6	A0104	1
7	A011	1
8	A020	1

Image Truncated

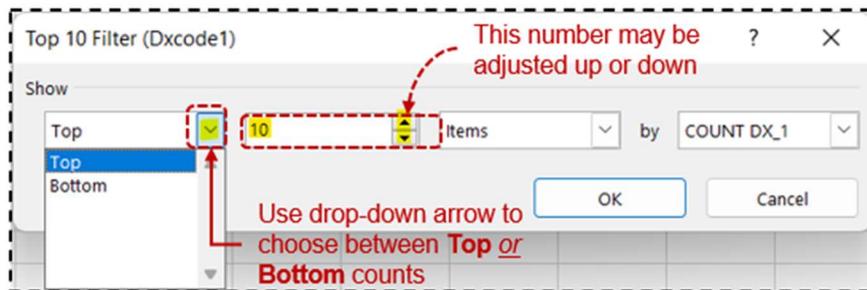
FILTERING FOR THE TOP 10 DXCODE1 VALUES

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 **Value Filters** and then the **Top 10...** option.



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**.

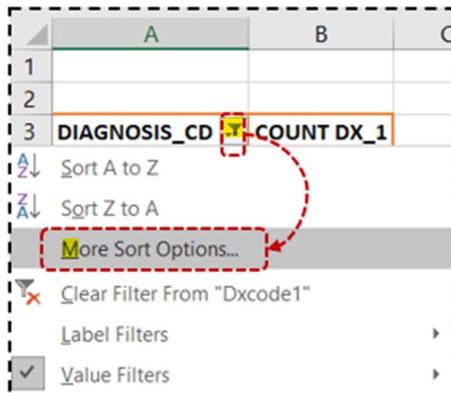
	A	B
1		
2		
3	DIAGNOSIS_CD	COUNT DX_1
4	A4851	4
5	C8268	4
6	F14181	4
7	H15841	4
8	I70628	4

Image Truncated

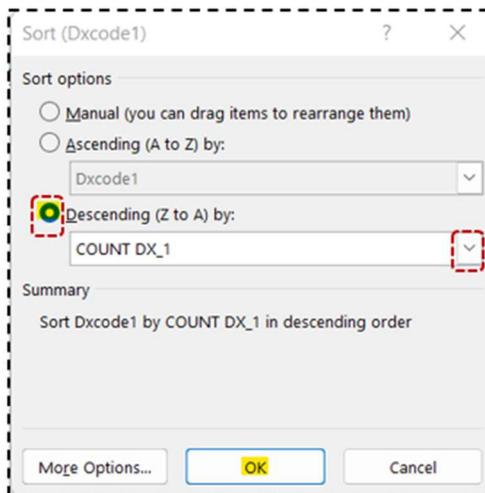
SORTING PIVOTTABLE RESULTS

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**.

	A	B
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	I70628	4
11	S75121A	4
12	M05822	4

Image Truncated

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.

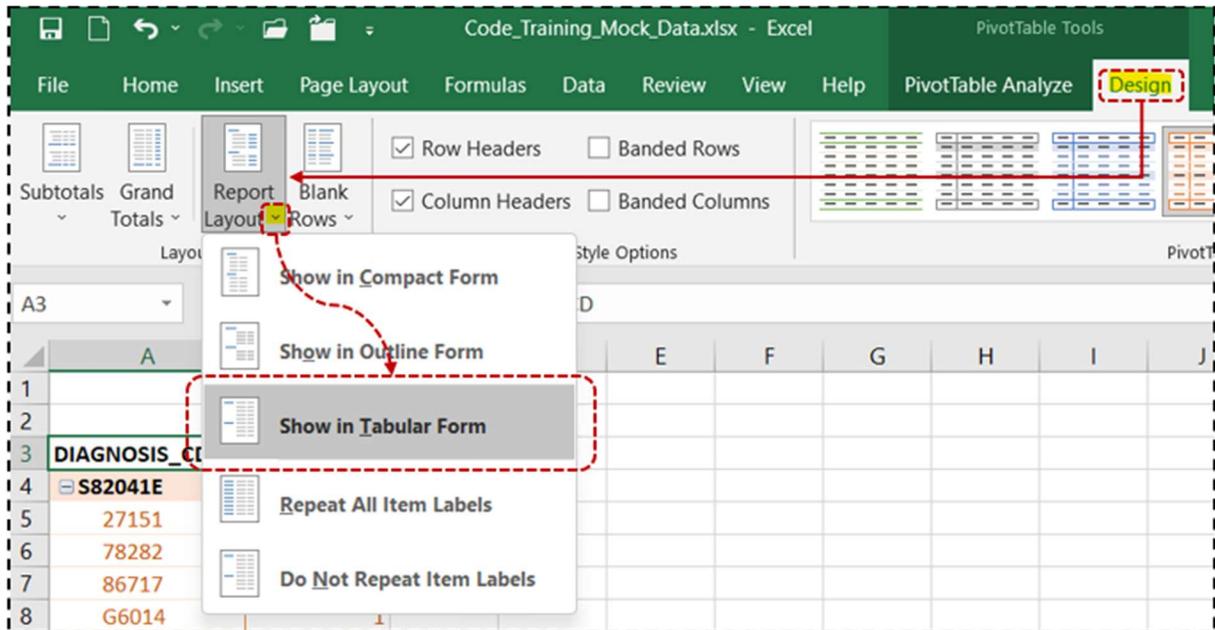
1. In the **PivotTable Fields pane** drag the **CPTcode1** field to the **Rows** section:

The screenshot shows an Excel spreadsheet with a PivotTable and the PivotTable Fields task pane. The PivotTable has two columns: 'DIAGNOSIS_CD' and 'COUNT DX_1'. The task pane shows the 'CPTcode1' field being added to the 'Rows' section. A red dashed box highlights the 'CPTcode1' field in the task pane, and a red arrow points to it with the text 'Drag the field 'CPTcode1' to the 'Rows' section'.

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**.



For each Dxcode1 entry of "S82041" the corresponding CPTcode1 values were:

- 27151
- 78282
- 86717
- G6014
- L5636

	A	B	C
1			
2			
3	Dxcode1	CPTcode1	COUNT DX_1
4	⊖ S82041E	27151	1
5		78282	1
6		86717	1
7		G6014	1
8		L5636	1
9	S82041E Total		5
10	⊖ S89391G	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	⊖ S92144B	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.

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_Catgorey_Description
- d. Attending_Physician_Specialty
- e. Operating_Physician_Specialty

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

Westview Hospital - 2022 Operations Summary											
Periods: 1 - 12											
MONTH	CLAIMS	CLAIM_%	PAYER	CLAIMS	CLAIM_%	ATTENDING SPECIALTY	CLAIMS	CLAIM_%	OPERATING SPECIALTY	CLAIMS	CLAIM_%
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	5.7%
6	66	9.0%	Other Federal Program	0.41%	0.4%	Family medicine	43	5.9%	Family medicine	42	5.7%
7	63	8.6%	Other Non-Federal Program	0.82%	0.8%	Internal medicine	22	3.0%	Internal medicine	37	5.1%
8	49	6.7%	Self-Pay	0.41%	0.4%	Medical genetics	38	5.2%	Medical genetics	35	4.8%
9	57	7.8%	Unknown	0.68%	0.7%	Neurology	38	5.2%	Neurology	40	5.5%
10	59	8.1%	Workers Compensation	8.62%	8.6%	Nuclear medicine	37	5.1%	Nuclear medicine	34	4.7%
11	58	7.9%	(blank)	0.82%	0.8%	Obstetrics and gynecology	40	5.5%	Obstetrics and gynecology	22	3.0%
12	61	8.3%	TOTAL	100.0%	100.0%	Ophthalmology	25	3.4%	Ophthalmology	35	4.8%
(blank)		0.0%				Pathology	32	4.4%	Pathology	30	4.1%
TOTAL	731	100.0%				Pediatrics	37	5.1%	Pediatrics	38	5.2%
						Physical medicine and rehabilitatio	34	4.7%	Physical medicine and rehabilitatio	42	5.7%
						Preventive medicine	38	5.2%	Preventive medicine	28	3.8%
						Psychiatry	28	3.8%	Psychiatry	36	4.9%
						Radiation oncology	30	4.1%	Radiation oncology	44	6.0%
						Surgery	45	6.2%	Surgery	34	4.7%
						Urology	39	5.3%	Urology	40	5.5%
						(blank)	7	1.0%	(blank)	5	0.7%
						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.

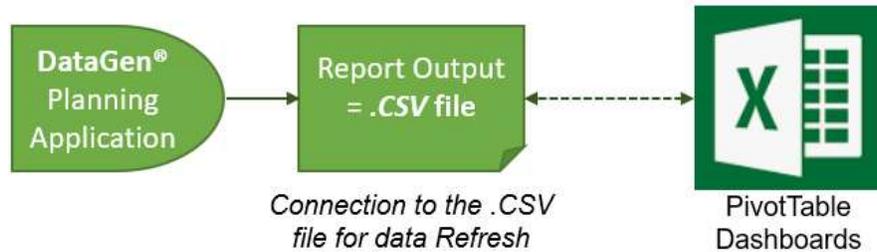
Westview Hospital - 2022 Operations Summary									
Periods:									

← Used green shading for cells 'A2:B2'

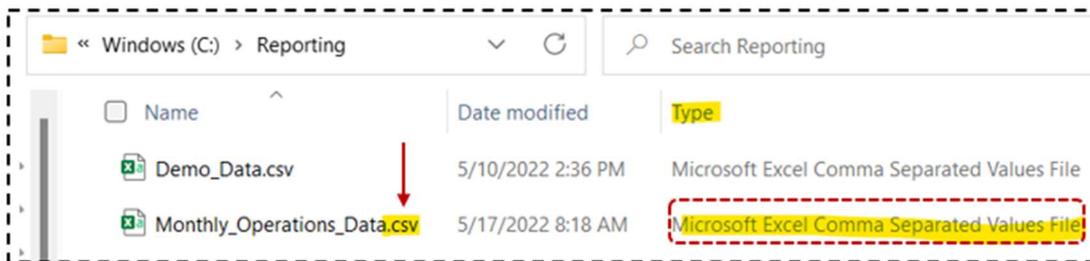
↑ Increased font size to 22 for cell 'A1'

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

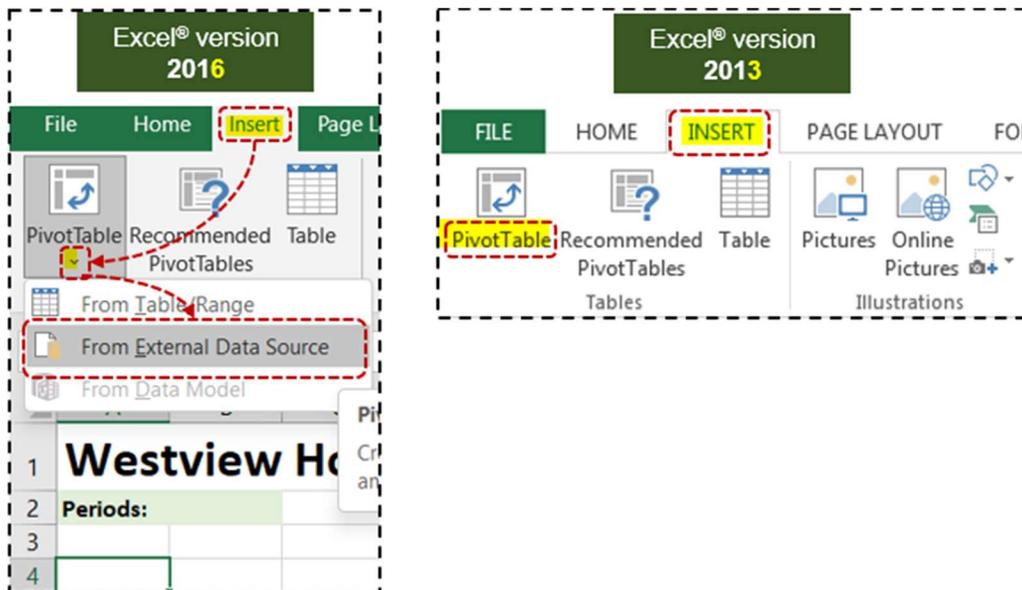
As discussed in Section 2, file importing in Excel may be accomplished in multiple ways. Since we're creating a dashboard and ***our report is recurring***, importing the .CSV data directly into the PivotTable is our best approach. This method will allow us to keep our existing PivotTable formatting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



- 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**.

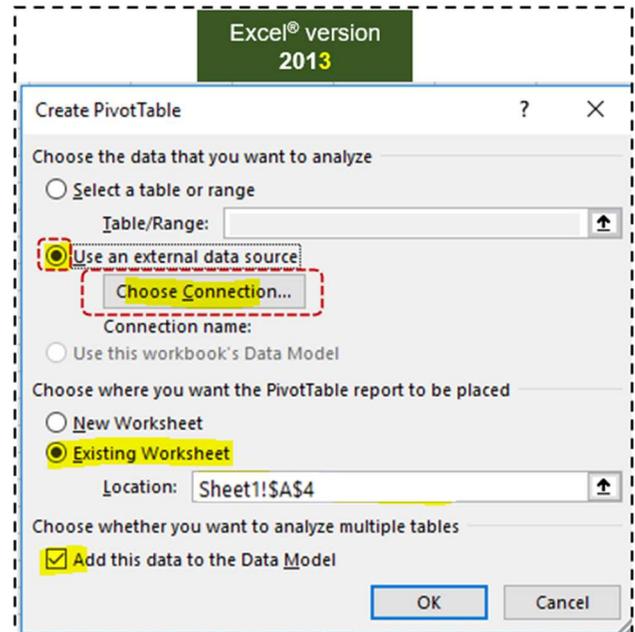
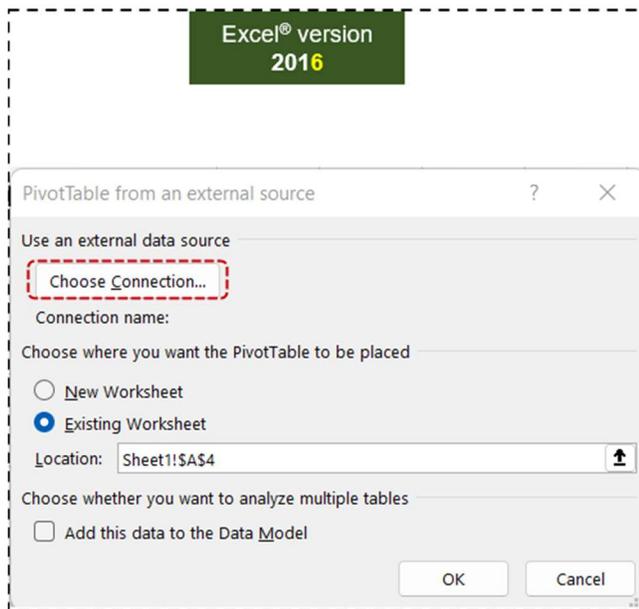


- Return to the spreadsheet you created in **step #2** above; in our example this is file: **Monthly_Operations_Summary.xlsx**.
- With your cursor in cell **A4**, from the ribbon select **Insert : PivotTable : From External Data Source**.

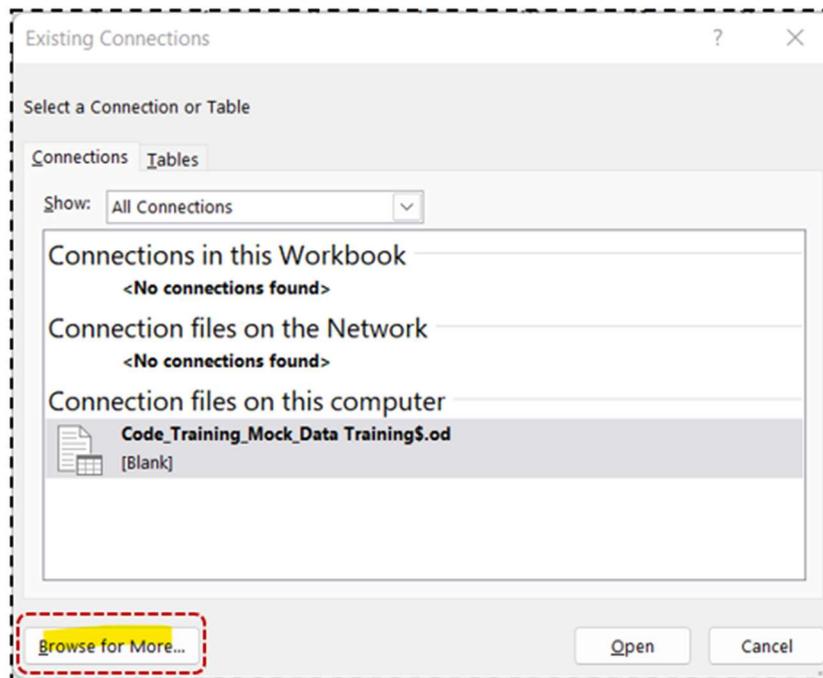


The following dialogue box will appear:

9. Click the **Choose Connection...** button.



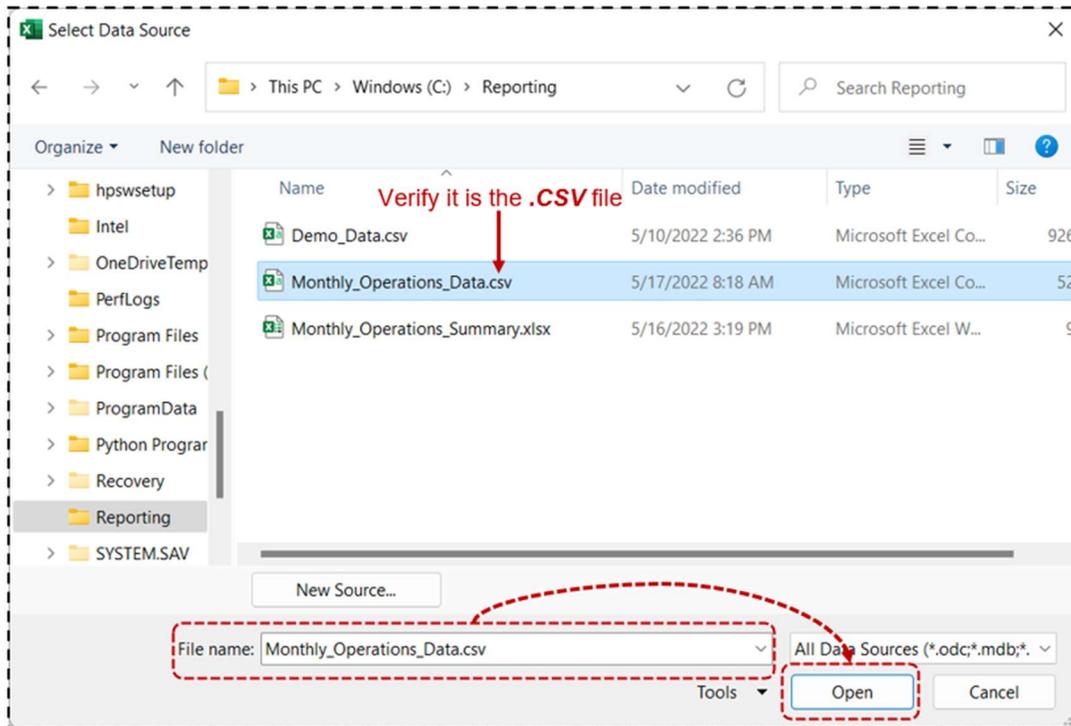
A prompt *similar* to the following should appear:



10. Click the **Browse for More...** button.

11. When prompted, select the file path where the .CSV file is located.

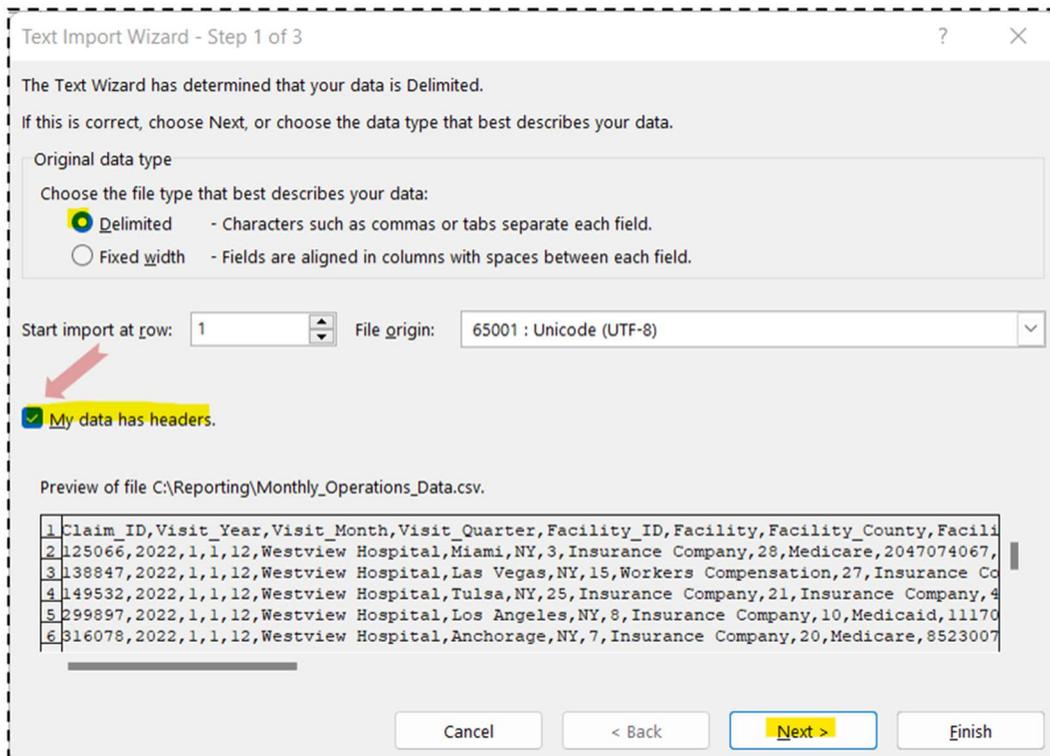
12. Click the **Open** button.



The following **Text Import Wizard** will be displayed:

13. Select the **Delimited** radio button and the **My data has headers** check box.

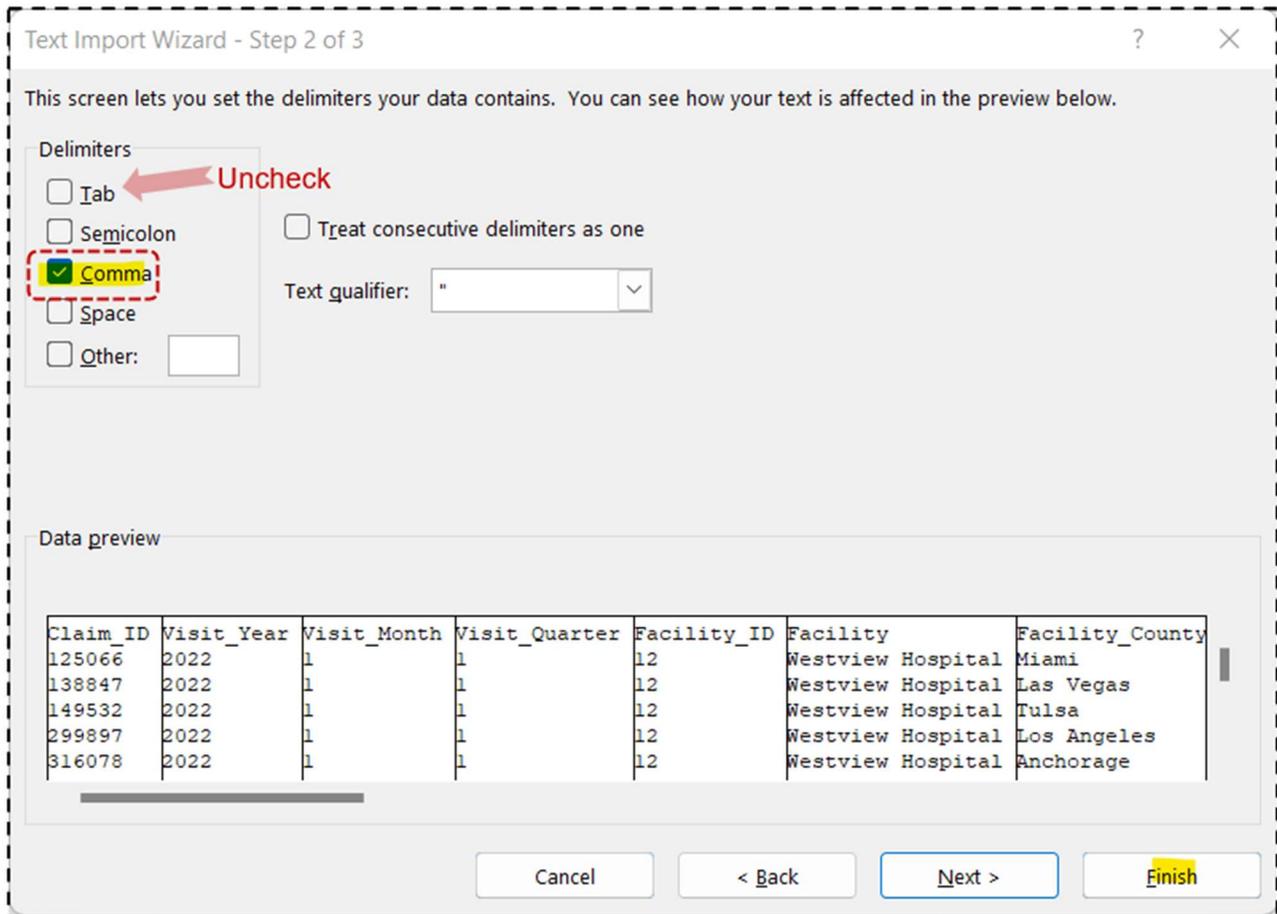
14. Click the **Next>** button.



Step 2 of the **Text Import Wizard** will be displayed:

15. For the Delimiters, select the **Comma** check box.

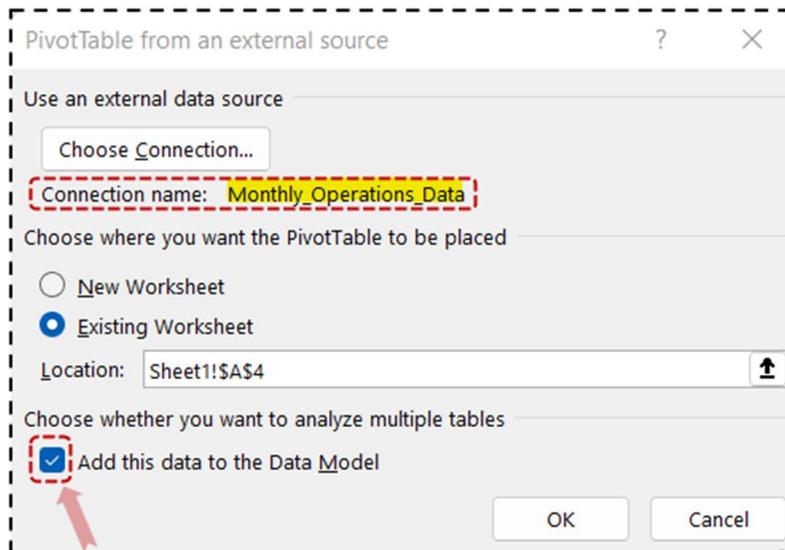
16. Click **Finish**.



The following prompt will appear:

17. Click the **Add this data to the Data Model** checkbox.

18. Click **OK**.



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



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

Westview Hospital - 202

Periods:

PivotTable1

To build a report, choose fields from the PivotTable Field List

PivotTable Fields

Active All

Choose fields to add to report:

Search

Monthly_Operations_Data

- Claim_ID
- Visit_Year
- Visit_Month
- Visit_Quarter

Fields from the .CSV file

Drag fields between areas below:

Filters	Columns
Rows	Σ Values

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:
 - **Visit_year** (Rows section)
 - **Claim_ID** (Σ Values section)
 - **Claim_ID** (Σ Values section)

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

Row Labels	Sum of Claim_ID	Sum of Claim_ID2
1	133616387	133616387
2	152476193	152476193
3	158171138	158171138
4	169980878	169980878
5	160042392	160042392
Grand Total	774286988	774286988

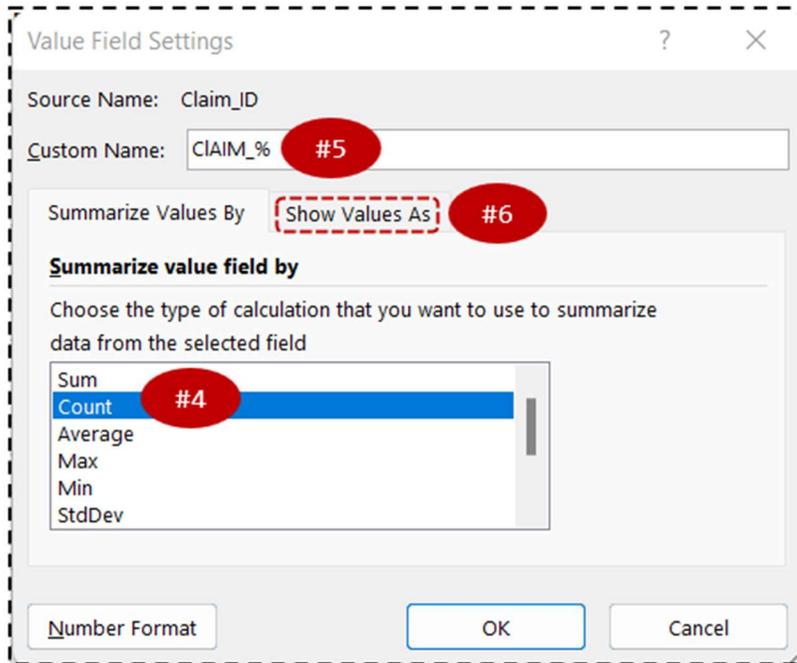
DISPLAYING PERCENTAGES IN PIVOTTABLES

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

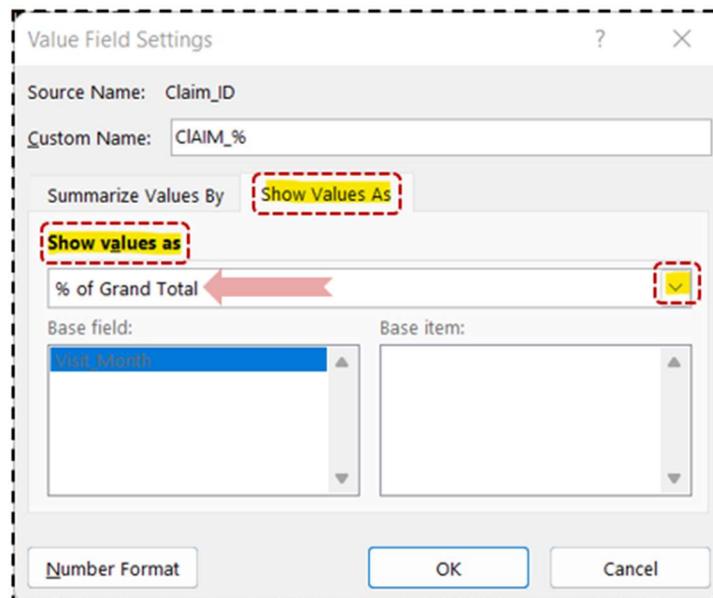
Value Field Settings...

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**.



9. [Right-click](#) 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 *one* decimal place.
- g. **PivotTable Styles** style changed to **dark green**.
- h. Added border/gridlines to PivotTable.

	A	B	C
1	Westview 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**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Westview Hospital - 2022 Operations Summary														
2	Periods:	1 - 5													
3															
4	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%
6	2	67	21.1%		2	67	21.1%		2	67	21.1%		2	67	21.1%
7	3	71	22.3%		3	71	22.3%		3	71	22.3%		3	71	22.3%
8	4	67	21.1%		4	67	21.1%		4	67	21.1%		4	67	21.1%
9	5	60	18.9%		5	60	18.9%		5	60	18.9%		5	60	18.9%
10	TOTAL	318	100.0%		TOTAL	318	100.0%		TOTAL	318	100.0%		TOTAL	318	100.0%

12. Select cell **E4** and change the text to **PAYER**.

13. From the PivotTable Fields pane **uncheck** **Visit_Month**.

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

view Hospital - 2022 Operations Summary

CLAIMS	CLAIM_%	PAYER	CLAIMS	CLAIM_%
53	16.7%	(blank)	4	1.3%
67	21.1%	Blue Cross	25	7.9%
71	22.3%	CHAMPUS	1	0.3%
67	21.1%	Insurance Company	113	35.5%
60	18.9%	Medicaid	88	27.7%
318	100.0%	Medicare	44	13.8%
		Other Federal Program	1	0.3%
		Other Non-Federal Program	4	1.3%
		Self-Pay	4	1.3%
		Unknown	1	0.3%
		Workers Compensation	33	10.4%
		TOTAL	318	100.0%

PivotTable Fields

Active All

Choose fields to add to report:

Search

- Visit_Month
- Visit_Quarter
- Facility_ID
- Facility
- Facility_Count
- Facility_State
- Payor_Category_Code
- Payor_Category_Description**

Drag fields between areas below:

Filters

Columns

Rows

Payor_Category_Description

Σ Values

CLAIMS

CLAIM_%

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

Westview Hospital - 2022 Operations Summary

Periods: 1 - 5

MONTH	CLAIMS	CLAIM_%	PAYER	CLAIMS	CLAIM_%	ATTENDING SPECIALTY	CLAIMS	CLAIM_%	OPERATING SPECIALTY	CLAIMS	CLAIM_%
1	53	16.7%	(blank)	4	1.3%	(blank)	3	0.9%	(blank)	4	1.3%
2	67	21.1%	Blue Cross	25	7.9%	Allergy and immunology	20	6.3%	Allergy and immunology	19	6.0%
3	71	22.3%	CHAMPUS	1	0.3%	Anesthesiology	16	5.0%	Anesthesiology	23	7.2%
4	67	21.1%	Insurance Company	113	35.5%	Dermatology	21	6.6%	Dermatology	11	3.5%
5	60	18.9%	Medicaid	88	27.7%	Diagnostic radiology	24	7.5%	Diagnostic radiology	19	6.0%
TOTAL	318	100.0%	Medicare	44	13.8%	Emergency medicine	12	3.8%	Emergency medicine	15	4.7%
			Other Federal Program	1	0.3%	Family medicine	19	6.0%	Family medicine	12	3.8%
			Other Non-Federal Program	4	1.3%	Internal medicine	13	4.1%	Internal medicine	11	3.5%
			Self-Pay	4	1.3%	Medical genetics	16	5.0%	Medical genetics	16	5.0%
			Unknown	1	0.3%	Neurology	20	6.3%	Neurology	14	4.4%
			Workers Compensation	33	10.4%	Nuclear medicine	17	5.3%	Nuclear medicine	15	4.7%
			TOTAL	318	100.0%	Obstetrics and gynecology	17	5.3%	Obstetrics and gynecology	12	3.8%
						Ophthalmology	12	3.8%	Ophthalmology	13	4.1%
						Pathology	11	3.5%	Pathology	13	4.1%
						Pediatrics	12	3.8%	Pediatrics	16	5.0%
						Physical medicine and rehabilitation	15	4.7%	Physical medicine and rehabilitation	21	6.6%
						Preventive medicine	18	5.7%	Preventive medicine	16	5.0%
						Psychiatry	13	4.1%	Psychiatry	13	4.1%
						Radiation oncology	11	3.5%	Radiation oncology	18	5.7%
						Surgery	20	6.3%	Surgery	17	5.3%
						Urology	8	2.5%	Urology	20	6.3%
						TOTAL	318	100.0%	TOTAL	318	100.0%

PivotTable Fields

Active All

Choose fields to add to report:

Search

- Visit_Month
- Visit_Quarter
- Facility_ID
- Facility
- Facility_Count
- Facility_State
- Payor_Category_Code
- Payor_Category_Description**

Drag fields between areas below:

Filters

Columns

Rows

Payor_Category_Description

Σ Values

CLAIMS

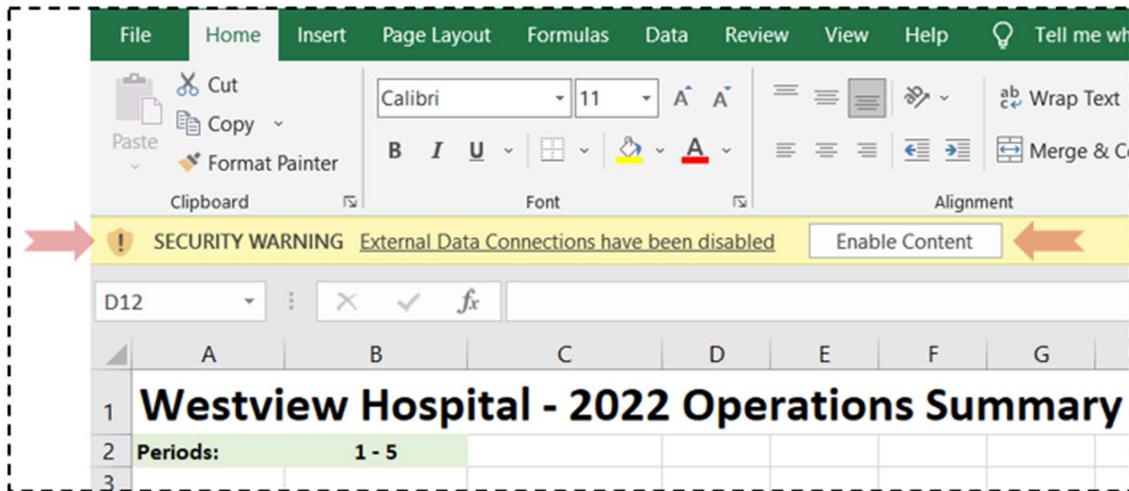
CLAIM_%

16. **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.



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.

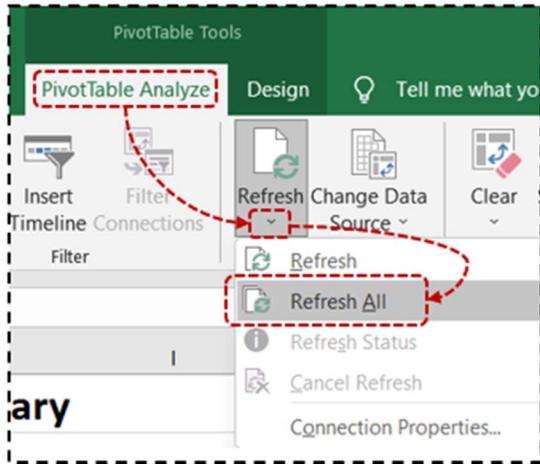
New information may be added to your existing PivotTable(s) either by appending or overwriting the existing data using the **Refresh** feature.

STEPS:

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

IMPORTANT!
The <i>filename</i> and <i>type</i> must be the same as the original connection, for example
YES = Monthly_Operations_Data.csv
NO = Monthly_Operations_Data_updated.xlsx

2. Select a cell from any of the PivotTables, then from the **PivotTable Tools: Analyze** ribbon click the **Refresh** drop-down arrow and **Refresh All**.



REFRESH VS. REFRESH ALL

The difference between selecting **Refresh** and **Refresh All** is **Refresh** only updates the **active** PivotTable. By selecting **Refresh All** we're updating all of the PivotTables in the dashboard.

Westview Hospital - 2022 Operations Summary															
Periods:															
MONTH	CLAIMS	CLAIM_%	PAYER	CLAIMS	CLAIM_%	ATTENDING SPECIALITY	CLAIMS	CLAIM_%	OPERATING SPECIALITY	CLAIMS	CLAIM_%	CLAIMS	CLAIM_%	CLAIMS	CLAIM_%
1	53	7.3%	(blank)	5	0.7%	(blank)	7	1.0%	(blank)	5	0.7%				
2	67	9.2%	Blue Cross	59	8.1%	Allergy and immunology	35	4.8%	Allergy and immunology	37	5.1%				
3	71	9.7%	CHAMPUS	4	0.5%	Anesthesiology	36	4.9%	Anesthesiology	40	5.5%				
4	67	9.2%	Insurance Company	263	36.0%	Dermatology	55	7.5%	Dermatology	33	4.5%				
5	60	8.2%	Medicaid	197	26.9%	Diagnostic radiology	40	5.5%	Diagnostic radiology	37	5.1%				
6	66	9.0%	Medicare	110	15.0%	Emergency medicine	32	4.4%	Emergency medicine	42	5.7%				
7	63	8.6%	Other Federal Program	3	0.4%	Family medicine	43	5.9%	Family medicine	42	5.7%				
8	49	6.7%	Other Non-Federal Program	5	0.7%	Internal medicine	22	3.0%	Internal medicine	37	5.1%				
9	57	7.8%	Self-Pay	8	1.1%	Medical genetics	38	5.2%	Medical genetics	35	4.8%				
10	59	8.1%	Unknown	5	0.7%	Neurology	38	5.2%	Neurology	40	5.5%				
11	58	7.9%	Workers Compensation	71	9.7%	Nuclear medicine	37	5.1%	Nuclear medicine	34	4.7%				
12	61	8.3%	Workers' Compensation	1	0.1%	Obstetrics and gynecology	40	5.5%	Obstetrics and gynecology	22	3.0%				
TOTAL	731	100.0%	TOTAL	731	100.0%	TOTAL	731	100.0%	TOTAL	731	100.0%	TOTAL	731	100.0%	TOTAL

SUPPORT:

Please email planningsupport@datagen.info with any questions.