

Preparing the PEDs PAC Data Report Step-by-Step Guide

Compiling the Data

1. Copying patient data from the previous Source File 1 into the current AY folder.

- a. Navigate to the **Folder 1 → Folder 2 → Folder 3 → Folder 4 → Source File 1** (from 2nd of current month)
- b. Right-click and copy **Source File 1**
- c. Navigate back to the **Folder 1 → Folder 2 → Folder 3 → Folder 4 → current AY** folder (i.e. AY 23-24)
- d. Create a new folder for the previous month (i.e. in Nov, create an October folder)
- e. Paste the **Source File 1** into this folder.

2. Copying the data from the Source File 2, which is received via email, into the Source File 3.

- a. In the same, new “previous month” folder, insert the **Source File 2** you received from the chief resident. Then, open the **Source File 2**.
- b. Navigate back to **Folder 4**.
- c. Find and open the **Source File 3**.
- d. Copy the data for the previous month from the **Source File 2** to the **Source File 3**. Do not include Attending or Chief data.
 - i. Be sure to include the data from all the following columns: EPIC ID, Provider, Month Year, PAC and PCP ½ days, Specialty Clinic, Month ½ Clinic Days
 - ii. Specialty Clinic = SBHC
 - iii. Month ½ Clinic Days = Number of Half Day Sessions
 - iv. Current Tally = Total ½ Day Session
- e. Save and close the **Source File 3**. Close the **Source File 2**.

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3. Updating the Source File 4 using the Source File 1.

- a. Return to the **Source File 1** the previous month folder created above.
- b. Copy all the data starting with the first cell beneath ID. **Pro tip: If B6 is the first cell under the “CSN_ID” heading, select that cell and all the cells in that row up to AB6. Then press Ctrl + Shift + Down Arrow to quickly select all the appropriate data. Press Ctrl + C to copy the data.**
- c. Navigate back to the **Folder 4** and open the **Source File 4**.
- d. Paste **Source File 1** data into the **Source File 4**. Change the fill color of the cells to help differentiate between months. **Pro tip: Select both the first pasted cell and the adjacent cell in column A. Use Ctrl + Shift + Down to easily change the fill of empty cell to the left of the new data.**
- e. Save and close the **Source File 4**. Close the **Source File 1**.

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Managing the Worksheets and Dashboards in Tableau

1. Navigate to Folder 4 and open the Tableau file. The file is big so it could take a few minutes to open.
2. Check each of the below worksheets to ensure the correct years and up to the current month are included.



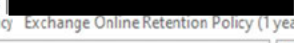
Worksheet Name	Check below for accuracy:
Peds Pac OnlyCmplpersession	Year
Peds Pac OnlyCmplpersession	No Update required
Cat ResPacdetail	Year and Month
Peds Pac Only Cmplpersession (2) ***	Updated based on T:Drive files; check new month (i.e. October 2023) in MONTH(Appt Date)
Cat ResPacYTD continuity	Year and Month
CatResPav cumul continuity t	Year
Test distinct patient mrns	Year
Cat Res PacCompletedSum(2)	Year
Cat Res Pac Appt StatusFYTot	Month
Cat Res Pac Appt Status Mthly	Month and Year
Cat Res Pac Appt Status Mthly ***	Updated based on T:Drive files; check new month
Worksheet Name	Check below for accuracy:
Peds PacAll Provider Compl	Month and Year
Peds PacAll Provider Compl (2)	Year
Peds PacbystatusFy%Sum graph	Month and Year
Peds Pac OnlyComplpersessPGY1***	Updated based on Folder 1 files; check new month (i.e. October 2023) in MONTH(Appt Date)
Peds Pac OnlyComplpersessPGY2***	Updated based on Folder 1 files; check new month (i.e. October 2023) in MONTH(Appt Date)
Peds Pac OnlyComplpersessYTD***	Updated based on Folder 1 files; check new month (i.e. October 2023) in MONTH(Appt Date)
Cat Res Pac Appt Status	Month and Year
Peds Pac OnlyCmplpersession	Month and Year


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3. Preparing the Tableau reports to be emailed.

- a. From the CAT Per Session dashboard to the PGY3 Dashboard, skim through to ensure that all the proper months and year are included.
- b. With the PGY3 dashboard tab selected, press and hold SHIFT then scroll back and click the tab for the Cat Per Session dashboard. This should select all the dashboard tabs between and including the two dashboards.
- c. Select File → Print to PDF → Selected sheets, Landscape, View file after Printing → OK
- d. Save in **Folder 3** → **Folder 4** → Current AY (i.e. AY 23-24) → Previous Month → Save with **appropriate monthly name**
- e. Email the report to the current chief resident and cc the VP. See list below for current email recipients (as of AY24):
 - i. Chief Physician Resident
 - ii. Physician
 - iii. Chief Physician Resident

November and December PAC Data Reports

 Curry, Adrian L
To 
Cc 
Retention Policy Exchange Online Retention Policy (1 year) Expires 1/9/2025


 PAC Data - through December 2023.pdf 638 KB  PAC Data - through November 2023.pdf 977 KB


Good afternoon,

Attached please find the PAC data reports for November and December 2023.

Please let me know if you see any issues. Thanks!

Sincerely,

Adrian Curry | Academic Operations Analyst 3, Academic Affairs
Our Lady of the Lake Regional Medical Center



WE LISTEN. WE HEAL.