

# Microsoft Excel Clinical Specialization Handout

The screenshot shows the Microsoft Excel interface with a data table and the Sort dialog box open. Red boxes and numbers 1-6 highlight the steps for sorting data:

1. Select the data range (A1:M31).
2. Click the Data tab in the ribbon.
3. Click the Sort button in the Data Tools group.
4. Check the "My data has headers" box in the Sort dialog.
5. Select "Care Manager" from the Column Sort by dropdown.
6. Click the OK button.

Medicaid Number	Current Acuity	First Name	Last Name	Birth Date	Address 1	City	Zip Code	Care Manager	Secondary Care Manager	Last AAA Assessment Date	Last AAA Assessment Due Date	Next AAA Assessment Date
661640137038	Level 3-Medium	Tracy	Solis	1/1/1940	8331 Oak Dr	Cleveland	44104	Elena Evans	Karen Knox	1/2/2024	1/4/2024	4/4/2024
2.50581E+11	Level 2-Low	Janice	Hill	1/23/1949	2683 Cherry Dr	Bedford	44146	Frank Fisher	Isabel Irwin	1/2/2024	1/4/2024	4/28/2024
6.63662E+11	Level 5-	Craig	Owens	2/15/1941	6444 Birch Blvd	Cleveland	44143	Alice Anderson	Elena Evans	1/2/2024	1/4/2024	5/16/2024
7.52037E+11	Level 1-	Melissa	Butler	2/16/1936	485 Aspen St	Seven Hills	44131	Bob Bennett	Frank Fisher	1/4/2024	1/4/2024	4/4/2024
1.70977E+11	Level 2-Low	Michael	Hill	2/24/1939	5055 Poplar Ln	Bedford	44146	Grace Green	Alice Anderson	1/5/2024	1/7/2024	4/28/2024
7.2932E+11	Level 4-High	Robert	Rice	5/4/1932	9473 Willow Way	Brookpark	44142	Isabel Irwin	Bob Bennett	1/13/2024	1/8/2024	5/18/2024
2.19199E+11	Level 5-	Edward	Dixon	5/10/1936	2792 Pine Ln	Lakewood	44107	Mia Morgan	Grace Green			7/2/2024
8.5872E+11	Level 2-Low	Jessica	Romero	5/24/1944	3719 Maple Dr	Cleveland	44135	Clara Carter	Isabel Irwin			6/2/2024
6.63662E+11	Level 2-Low	Amber	Hodges	6/8/1937	3269 Cherry Dr	Cleveland	44102	Karen Knox	Mia Morgan			9/2/2024
3.22245E+11	Level 2-Low	Bethany	Ayers	6/18/1935	8984 Elm Blvd	Highland Hills	44122	Elena Evans	Clara Carter			6/2/2024
7.87455E+11	Level 3-Medium	Robert	Thompson	7/14/1930	8418 Birch Dr	Bedford	44146	Frank Fisher	Karen Knox			4/2/2024
7.54409E+11	Level 3-Medium	David	Andrews	7/17/1946	9467 Birch Blvd	Lakewood	44107	Alice Anderson	Elena Evans			4/2/2024
5.94813E+11	Level 4-High	Casey	Sanchez	7/19/1946	4412 Cherry Ln	Olmsted	44070	Bob Bennett	Frank Fisher			5/2/2024
8.98318E+11	Level 5-	Jesse	Wright	7/22/1930	94 Willow Dr	Cleveland	44112	Grace Green	Alice Anderson			4/2/2024
2.76393E+11	Level 4-High	Anthony	Robles	7/22/1942	8397 Pine Ln	SPENCER	44275	Isabel Irwin	Bob Bennett			5/2/2024
8.22846E+11	Level 3-Medium	Michael	Jackson	7/24/1936	9198 Elm Blvd	Cleveland	44119	Mia Morgan	Grace Green			6/2/2024
2.81601E+11	Level 4-High	Alexandra	Bowman	7/26/1950	920 Aspen Dr	Beachwood	44122	Clara Carter	Isabel Irwin			7/2/2024
6.41326E+11	Level 5-	Stephanie	Burke	7/27/1930	5976 Poplar Ln	Rocky River	44116	Karen Knox	Mia Morgan			8/2/2024
8.14401E+11	Level 3-Medium	Katelyn	Daugherty	8/8/1931	3275 Cherry Blvd	Cleveland	44103	Elena Evans	Clara Carter	2/14/2024	2/15/2024	4/29/2024
2.94608E+11	Level 3-Medium	Amy	Jones	8/10/1937	7946 Birch Blvd	CLEVELAND	44115	Frank Fisher	Karen Knox	2/14/2024	2/16/2024	4/8/2024
4.69904E+11	Level 2-Low	Jodi	Woodard	8/16/1945	5671 Maple Ln	Willowick	44095	Alice Anderson	Mia Morgan	2/15/2024	2/16/2024	4/30/2024
5.02934E+11	Level 5-	Tara	Meyer	8/18/1944	8850 Poplar Dr	Cleveland	44143	Bob Bennett	Elena Evans	2/15/2024	2/18/2024	5/18/2024
2.61541E+11	Level 3-Medium	Kevin	Ortiz	8/28/1948	5426 Aspen Ln	Parma	44134	Grace Green	Frank Fisher	2/15/2024	2/18/2024	5/27/2024
2.24226E+11	Level 4-High	Justin	Garza	9/8/1930	459 Elm Way	Lakewood	44052	Isabel Irwin	Alice Anderson	2/15/2024	2/18/2024	4/19/2024
7.46867E+11	Level 5-	Marcus	Howard	10/4/1937	2904 Cherry Ln	Lakewood	44053	Mia Morgan	Bob Bennett	2/17/2024	2/18/2024	4/17/2024
9.26611E+11	Level 3-Medium	Stacey	Mcbride	10/28/1934	2962 Oak Dr	Cleveland	44103	Clara Carter	Grace Green	2/20/2024	2/19/2024	5/22/2024
6.32145E+11	Level 4-High	Lisa	Norris	11/4/1947	9029 Cedar St	Euclid	44123	Karen Knox	Isabel Irwin	2/22/2024	2/22/2024	4/15/2024
2.16648E+11	Level 3-Medium	Sheena	Greene	11/18/1930	1155 Oak Dr	Hts	44143	Mia Morgan	Bob Bennett	2/24/2024	2/25/2024	5/2/2024
8.3459E+11	Level 5-	Hannah	Bridges	11/24/1935	274 Aspen St	Euclid	44132	Clara Carter	Clara Carter	2/25/2024	2/26/2024	5/18/2024
9.74976E+11	Level 4-High	Cheryl	Oliver	12/23/1940	4608 Elm Ave	Euclid	44132	Isabel Irwin	Karen Knox	2/27/2024	2/27/2024	5/25/2024

## Sorting Data:

1. Highlight all of your data.
2. Click the Data tab.
3. Click the Sort button
4. Make sure the My data has headers box should be checked.
5. Click the Sort by drop-down box and choose the item you want to sort by.
6. Click OK.

# Microsoft Excel Clinical Specialization Handout

The screenshot shows the Microsoft Excel interface with the 'Clinical Specialization Exercise working File' open. The 'Data' tab is selected in the ribbon. A data table is visible with columns: Medicaid Number, Current Acuity, First Name, Last Name, Birth Date, Address 1, City, Zip Code, Care Manager, Secondary Care Manager, Last AAA Assessment Date, Last AAA Assessment Due Date, and Next AAA Assessment Date. The 'Sort' dialog box is open, showing 'Care Manager' as the primary sort criteria and 'City' as the second-level sort criteria. The 'My data has headers' checkbox is checked. The 'OK' button is highlighted.

1. Highlight all of your data.

2. Click the Data tab.

3. Click the Sort button.

4. Make sure the My data has headers box should be checked.

5. Click the Sort by drop-down box and choose the first item you want to sort by.

6. Click the Add Level button.

7. Click the Then by drop-down box and choose the second item you want to sort by.

8. Click OK.

## Completing a Second-level Sort:

1. Highlight all of your data.
2. Click the Data tab.
3. Click the Sort button

4. Make sure the My data has headers box should be checked.
5. Click the Sort by drop-down box and choose the first item you want to sort by.
6. Click the Add Level button.
7. Click the Then by drop-down box and choose the second item you want to sort by.
8. Click OK.

# Microsoft Excel Clinical Specialization Handout

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. A filter dropdown menu is open for the 'Care Manager' column. The menu lists several names with checkboxes. The 'OK' button is highlighted. Red boxes and numbers 1 through 6 indicate the steps for filtering data.

Medicaid Number	Current Acuity	First Name	Last Name	Birth Date	Address 1	City	Zip Code	Care Manager	Secondary Care Manager	Last AAA Assessment Date	Last AAA Assessment Due Date	Next AAA Assessment Date
661640137038	Level 3-Medium	Tracy	Solis	1/1/1940	8331 Oak Dr			Karen Knox		1/2/2024	1/4/2024	4/4/2024
2.50581E+11	Level 2-Low	Janice	Hill	1/23/1949	2683 Cherry Dr			Isabel Irwin		1/2/2024	1/4/2024	4/28/2024
6.63662E+11	Level 5-	Craig	Owens	2/15/1941	6444 Birch Blv			Elena Evans		1/2/2024	1/4/2024	5/16/2024
7.52037E+11	Level 1-											
1.70977E+11	Monitoring	Melissa	Butler	2/16/1936	485 Aspen St			Frank Fisher		1/4/2024	1/4/2024	
7.2932E+11	Level 2-Low	Michael	Hill	2/24/1939	5055 Poplar Ln			Alice Anderson		1/5/2024	1/7/2024	4/28/2024
2.19199E+11	Level 4-High	Robert	Rice	5/4/1932	9473 Willow V			Bob Bennett		1/13/2024	1/8/2024	5/18/2024
8.5872E+11	Level 5-	Edward	Dixon	5/10/1936	2792 Pine Ln			Grace Green		1/15/2024	1/15/2024	4/17/2024
6.63662E+11	Level 2-Low	Jessica	Romero	5/24/1944	3719 Maple Dr			Isabel Irwin		1/17/2024	1/17/2024	5/6/2024
	Level 2-Low	Amber	Hodges	6/8/1937	3269 Cherry Dr			Mia Morgan		1/22/2024	1/19/2024	5/19/2024
												5/26/2024
11.3.22245E+11	Level 2-Low	Bethany	Ayers	6/18/1935	8984 Elm Blvd			Clara Carter		1/23/2024	1/24/2024	
7.87455E+11	Level 3-Medium	Robert	Thompson	7/14/1930	8418 Birch Dr			Karen Knox		1/25/2024	1/25/2024	4/4/2024
7.54409E+11	Level 3-Medium	David	Andrews	7/17/1946	9467 Birch Blv			Elena Evans		1/25/2024	1/28/2024	4/24/2024
												5/15/2024
14.5.94813E+11	Level 4-High	Casey	Sanchez	7/19/1946	4412 Cherry Ln			Frank Fisher		1/26/2024	1/28/2024	
8.98318E+11	Level 5-	Jesse	Wright	7/22/1930	94 Willow Dr			Alice Anderson		1/28/2024	1/29/2024	4/4/2024
2.76393E+11	Level 4-High	Anthony	Robles	7/22/1942	8397 Pine Ln			Bob Bennett		1/31/2024	1/30/2024	4/25/2024
8.22846E+11	Level 3-Medium	Michael	Jackson	7/24/1936	9198 Elm Blvd			Grace Green		2/4/2024	2/2/2024	5/16/2024
2.81601E+11	Level 4-High	Alexandra	Bowman	7/26/1950	920 Aspen Dr			Isabel Irwin		2/11/2024	2/6/2024	4/7/2024
6.41326E+11	Level 5-	Stephanie	Burke	7/27/1930	5976 Poplar Ln			Mia Morgan		2/13/2024	2/13/2024	5/18/2024
8.14401E+11	Level 3-Medium	Katelyn	Daugherty	8/8/1931	3275 Cherry B			Clara Carter		2/14/2024	2/15/2024	4/29/2024
2.94608E+11	Level 3-Medium	Amy	Jones	8/10/1937	7946 Birch Blv			Karen Knox		2/14/2024	2/16/2024	4/8/2024
4.69904E+11	Level 2-Low	Jodi	Woodard	8/16/1945	5671 Maple Ln			Mia Morgan		2/15/2024	2/16/2024	4/30/2024
5.02934E+11	Level 5-	Tara	Meyer	8/18/1944	8850 Poplar Dr	Cleveland	44143	Bob Bennett		2/15/2024	2/18/2024	5/18/2024
2.61541E+11	Level 3-Medium	Kevin	Ortiz	8/28/1948	5426 Aspen Ln	Parma	44134	Grace Green		2/15/2024	2/18/2024	5/27/2024
2.24226E+11	Level 4-High	Justin	Garza	9/8/1930	459 Elm Way	Lakewood	44052	Isabel Irwin		2/15/2024	2/18/2024	4/19/2024
7.46867E+11	Level 5-	Marcus	Howard	10/4/1937	2904 Cherry Ln	Lakewood	44053	Mia Morgan		2/17/2024	2/18/2024	4/17/2024
9.26611E+11	Level 3-Medium	Stacey	Mcbride	10/28/1934	2962 Oak Dr	Cleveland	44103	Clara Carter		2/20/2024	2/19/2024	5/22/2024
6.32145E+11	Level 4-High	Lisa	Norris	11/4/1947	9029 Cedar St	Euclid	44123	Karen Knox		2/22/2024	2/22/2024	4/15/2024
						Richmond						5/2/2024
29.2.16648E+11	Level 3-Medium	Sheena	Greene	11/18/1930	1155 Oak Dr	Hts	44143	Mia Morgan		2/24/2024	2/25/2024	
8.3459E+11	Level 5-	Hannah	Bridges	11/24/1935	274 Aspen St	Euclid	44132	Clara Carter		2/25/2024	2/26/2024	5/18/2024
9.74976E+11	Level 4-High	Cheryl	Oliver	12/23/1940	4608 Elm Ave	Euclid	44132	Isabel Irwin		2/27/2024	2/27/2024	5/25/2024

## Filtering Data:

- Click on the "1" next to the top row to highlight the first row of data.
- Click on the Data tab.
- Click on the Filter button.
- Click the downward-pointing triangle next to the header by which you want to filter the data.
- Uncheck the items that you do not wish to see. Only the check marked items will be visible.
- Click OK.

# Microsoft Excel Clinical Specialization Handout

The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The 'Conditional Formatting' button is highlighted in the ribbon. The 'Highlight Cells Rules' menu is open, and the 'Duplicate Values...' option is selected. The 'Duplicate Values...' dialog box is shown, and the 'Duplicate Values...' option is selected in the list.

Medicaid Number	Current Acuity	First Name	Last Name	Birth Date	Address 1	City	Zip Code	Care Manager	Second	Assessment Due Date	Next AAA Assessment Date
661640137038	Level 3-Medium	Tracy	Solis	1/1/1940	8331 Oak Dr	Cleveland	44104	Elena Evans	Karen Knox	3/2/2024	6/2/2024
2.50581E+11	Level 2-Low	Janice	Hill	1/23/1949	2683 Cherry Dr	Bedford	44146	Frank Fisher	Isabel Irwin	3/2/2024	6/2/2024
6.63662E+11	Level 5-Intensive	Craig	Owens	2/15/1941	6444 Birch Blvd	Cleveland	44143	Alice Anderson	Elena Evans	3/2/2024	6/2/2024
7.52037E+11	Level 1-Monitoring	Melissa	Butler	2/16/1936	485 Aspen St	Seven Hills	44131	Bob Bennett	Frank Fisher	3/6/2024	6/4/2024
1.70977E+11	Level 2-Low	Michael	Hill	2/24/1939	5055 Poplar Ln	Bedford	44146	Grace Green	Alice Anderson	3/6/2024	6/5/2024
7.2932E+11	Level 4-High	Robert	Rice	5/4/1932	9473 Willow Way	Brookpark	44142	Isabel Irwin	Bob Bennett	3/12/2024	6/13/2024
8.219199E+11	Level 5-Intensive	Edward	Dixon	5/10/1936	2792 Pine Ln	Lakewood	44107	Mia Morgan	Grace Green	3/15/2024	6/15/2024
8.5872E+11	Level 2-Low	Jessica	Romero	5/24/1944	3719 Maple Dr	Cleveland	44135	Clara Carter	Isabel Irwin	3/17/2024	6/17/2024
6.63662E+11	Level 2-Low	Amber	Hodges	6/8/1937	3269 Cherry Dr	Cleveland	44102	Karen Knox	Mia Morgan	3/23/2024	6/23/2024
3.22245E+11	Level 2-Low	Bethany	Ayers	6/18/1935	8984 Elm Blvd	Hills	44122	Elena Evans	Clara Carter	3/23/2024	6/23/2024
7.87455E+11	Level 3-Medium	Robert	Thompson	7/14/1930	8418 Birch Dr	Bedford	44146	Frank Fisher	Karen Knox	3/25/2024	6/25/2024
7.54409E+11	Level 3-Medium	David	Andrews	7/17/1946	9467 Birch Blvd	Lakewood	44107	Alice Anderson	Elena Evans	3/25/2024	6/25/2024
5.94813E+11	Level 4-High	Casey	Sanchez	7/19/1946	4412 Cherry Ln	Olmsted	44070	Bob Bennett	Frank Fisher	3/26/2024	6/26/2024
8.98318E+11	Level 5-Intensive	Jesse	Wright	7/22/1930	94 Willow Dr	Cleveland	44112	Grace Green	Alice Anderson	3/28/2024	6/28/2024
2.76393E+11	Level 4-High	Anthony	Robles	7/22/1942	8397 Pine Ln	SPENCER	44275	Isabel Irwin	Bob Bennett	3/31/2024	6/30/2024
8.22846E+11	Level 3-Medium	Michael	Jackson	7/24/1936	9198 Elm Blvd	Cleveland	44119	Mia Morgan	Grace Green	4/4/2024	7/4/2024
2.81601E+11	Level 4-High	Alexandra	Bowman	7/26/1950	920 Aspen Dr	Beachwood	44122	Clara Carter	Isabel Irwin	4/11/2024	7/11/2024
6.41326E+11	Level 5-Intensive	Stephanie	Burke	7/27/1930	5976 Poplar Ln	Rocky River	44116	Karen Knox	Mia Morgan	4/13/2024	7/13/2024
8.14401E+11	Level 3-Medium	Katelyn	Daugherty	8/8/1931	3275 Cherry Blvd	Cleveland	44103	Elena Evans	Clara Carter	4/14/2024	7/14/2024
2.94608E+11	Level 3-Medium	Amy	Jones	8/10/1937	7946 Birch Blvd	CLEVELAND	44115	Frank Fisher	Karen Knox	4/14/2024	7/14/2024
4.69904E+11	Level 2-Low	Jodi	Woodard	8/16/1945	5671 Maple Ln	Willowick	44095	Alice Anderson	Mia Morgan	4/15/2024	7/15/2024
5.02934E+11	Level 5-Intensive	Tara	Meyer	8/18/1944	8850 Poplar Dr	Cleveland	44143	Bob Bennett	Elena Evans	4/15/2024	7/15/2024
2.61541E+11	Level 3-Medium	Kevin	Ortiz	8/28/1948	5426 Aspen Ln	Parma	44134	Grace Green	Frank Fisher	4/15/2024	7/15/2024
2.24226E+11	Level 4-High	Justin	Garza	9/8/1930	459 Elm Way	Lakewood	44052	Isabel Irwin	Alice Anderson	4/15/2024	7/15/2024
7.46867E+11	Level 5-Intensive	Marcus	Howard	10/4/1937	2904 Cherry Ln	Lakewood	44053	Mia Morgan	Bob Bennett	3/15/2024	6/15/2024
9.26611E+11	Level 3-Medium	Stacey	Mcbride	10/28/1934	2962 Oak Dr	Cleveland	44103	Clara Carter	Grace Green	4/20/2024	7/20/2024
6.32145E+11	Level 4-High	Lisa	Norris	11/4/1947	9029 Cedar St	Euclid	44123	Karen Knox	Isabel Irwin	4/22/2024	7/22/2024
2.16648E+11	Level 3-Medium	Sheena	Greene	11/18/1930	1155 Oak Dr	Richmond Hts	44143	Mia Morgan	Bob Bennett	4/24/2024	7/24/2024

## Conditional Formatting

1. Highlight your data.
2. Click on the Home tab.
3. Click on the Conditional Formatting button

4. Hover overtop of Highlight Cells Rules
5. Click on the type of formatting you want (for example, Duplicate Values)
6. Click OK (not picture above)

# Microsoft Excel Clinical Specialization Handout

The screenshot shows the Microsoft Excel interface with the 'Formulas' tab selected. The 'Date & Time' group in the ribbon is highlighted. The formula bar displays '=WORKDAY(A2,10)'. A 'Function Arguments' dialog box is open, showing the 'Start\_date' as 'A2', 'Days' as '10', and 'Holidays' as blank. The 'OK' button is highlighted. The spreadsheet shows a list of dates in column A, with the formula result in column B.

	A	B
1	Current date	10 Business Days from the Current Date:
2	1/2/2024	=WORKDAY(A2,10)
3	1/2/2024	
4	1/2/2024	
5	1/4/2024	
6	1/5/2024	
7	1/13/2024	
8	1/15/2024	
9	1/17/2024	
10	1/22/2024	

**Workday Function— Returns a date that is a specified number of working days in the future.**

1. Click the Formulas tab.
2. Click Date & Time Functions
3. Click on Workday **\*not visible in the picture above\***
4. In the Start\_date box, type the cell that contains your starting date. For example, A2.
5. In the Days box, type the number of days you want to skip ahead. For example, 10
6. You can leave the holidays box blank.
7. Click on OK.
8. Pull down the green box to apply the formula down the column.