Excel Clinical Specialization

1. Introduction - PowerPoint
   * Introduce the training goals.
   * Explain the difference between the browser and desktop versions of Microsoft Excel.
   * Explain how to utilize the desktop version of Excel.
   * Verify that everyone has received the exercise file.
2. Reviewing Prior Knowledge – Worksheet Tab 1 “Review”
   * Review the following interface elements:
     + AutoSave
     + Manual Save
     + Redo & Undo (CTRL + Z & CTRL + Y)
     + Ribbon
     + Tabs & Groups
     + Name box
     + Formula bar
     + Columns
     + Rows
     + Worksheet Tabs
     + Slider bar
     + Zoom Settings
3. Setting the Stage for New Knowledge - Video
   * Play video on switching between the trainer’s screen and the participant’s screen and then transition to Worksheet Tab 2 – Practicing Excel Skills
4. Explain & Demonstrate Excel Skills – Transition to Worksheet Tab 2 “Practicing Excel Skills”
   * Explain the concept of an Excel range.
   * Setting up the spreadsheet
     + Point out the difference between cell A1 and A2, focusing on the “E+11”)
     + Change the data format in Column A “Medicaid Number” from “general” to “number” and remove decimal points.
     + Point out that Column H has a green triangle in the top right corner of the cells; this is a number stored as text.
     + Align all data in the spreadsheet to the top and left.
   * Sorting
     + Sort data by Care Manager
   * Second-level Sort
     + Sort data by Care Manager and Next AAA Assessment Due date
   * Filtering
     + Filter by Care Manager – Grace Green
     + Filter by Care Manager (Grace Green) and then Sort by Next AAA Assessment Due Date (Column M) Newest to oldest.
     + Filter by Care Manager (Elena Evans) and then Sort by Acuity Level (Column B) A to Z.
   * **Unfilter by Care Manager**
   * Conditional Formatting
     + Detecting Duplicates
       - Apply conditional formatting to detect duplicates in the Medicaid Number column.
     + Text that contains
       - Apply conditional formatting using “Text That Contains” in the Member Last Name column. Use “Romero” (Row 9)
     + A Date Occurring
       - Apply conditional formatting using “A Date Occurring next month” in the Next AAA Assessment Due column.
     + Combine Conditional Formatting & Filtering
       - Filter by color – Next AAA Assessment Date column (light pink)
   * **Remove all filters and Conditional Formatting**
5. Excel Skills Application – **Transition to Worksheet Tab 3 “More Practice.”**
   * Offer the following challenges to participants:
     + Pretend you are Frank Fisher. How many members do you have?
     + When was Janice Hill’s last assessment?
     + Pretend you are Grace Green. Highlight all of your assessments that occurred in March.
     + Pretend you are Mia Morgan. You have two upcoming assessments due on the same day. Which day, and which city are they in?
     + **Remove all filters and Conditional Formatting**
6. More Excel Skills Application - **Remain on Tab 3 More Practice worksheet tab.**
   * Transform the range into a table.
   * Demonstrate how to filter data in a table. (Filter by City)
   * Demonstrate how to sort data in a table. (Sort by Care Manager)

**Transition to Worksheet Tab 4 “Formulas are Fun”**

* + Explain the concept of a formula.
  + Utilize the edate formula to predict a future date.
    - Type the following formula in M2 =edate(K2,3) to automatically create a date 3 months from K2. Click on Cell M2 and pull the green box straight down to row 31.
  + Utilize the Workday function.
    - Utilize the workday function to predict a future date (allows you to exclude weekends and holidays) – Click on cell N2. Then click the Formulas tab. Click on Date & Time Functions, and then choose Workday.
    - For start date type K2
    - For days type 60
    - Leave holidays blank. To Exclude a holiday, you must have a column of dates to exclude.

1. Bonus Content - Transition to Worksheet Tab 5 “Bonus Content”
   * Apply Text-to-Columns to Column A
     + Apply Text-to-columns to a column – Click on Column A “Care Manager” to highlight the column. Click on the Data Tab, Data Tools Group, and then click on Text to Columns.
     + Choose delimited, and click next
     + Uncheck Tab and then check space and click next
     + Click finish
   * Find & Replace
     + Press CTRL + H or Click on the Home Tab, Editing Group and click on Find & Select.
   * Go to Special
     + Click on the Home Tab, Editing Group and click on Go To Special
       - Select all cells that meet a certain criteria.