

Before We Talk About OP Reports, We Need to Talk About Excel

OP Reports is a useful tool to get raw data about your practice, but it's not a full-featured spreadsheet program. It doesn't make pretty bar graphs, compute running averages, or have a cool point-and-click interactive interface.

Microsoft Excel, however, has powerful data analysis features; it's nearly ubiquitous on office computers, and there are hundreds, if not thousands, of free Excel tutorials and help sites on the Internet.

There's certainly no reason that OP Reports should be expected to duplicate the rich features of Excel. In fact, even for very simple data analysis, OP Reports novices may find that it's faster and more effective to: use OP Reports to quickly get a lot of raw, unformatted data, then dump the OP Report to Excel, to do more sophisticated transformations, like sorting, merging, averages, sums, etc.

If you don't know much about Microsoft Excel, you will probably find it beneficial to do some basic Excel tutorials before you start learning about OP Reports.

If you already know a lot about Excel, you can probably skip most of this section.

If you really hate Excel and don't like to use it – then your OP Reports experience will be even more unpleasant. Sorry.

Making the Most of Microsoft Excel: Basic Excel Functions

If you are not familiar with Excel, you may want to work through some of its basic tutorials first. There are so many free Excel tutorials available that there's no point in reproducing them all here. Even if you're fairly seasoned in Excel, spending a few moments reviewing key functions might remind you of some time-saving shortcuts (particularly in regards to your practice's data analysis.)

Obviously, the tutorials may not be precise depending on which version of Excel you are using.

Introductory Excel Tutorials

An overview of Microsoft-produced Excel 2013 tutorials is available here:

★ <http://bit.ly/19zVmRC>

Here are a few free Excel video tutorials to get you started:

★ <http://bit.ly/1Sd914s>

★ <http://bit.ly/1VaLroL>

★ <http://bit.ly/1Sd91S9>

PivotTables

PivotTables are a simple, elegant way to convert raw Excel data dumps into organized, meaningful summaries.

For example, let's say we need to turn in Meaningful Use data to our state's Medicaid Bureau. We need a report that shows, for the period 1/1/13 through 12/31/13:

- ★ How many different face-to-face paid Medicaid encounters we had during the year
- ★ Who the provider was for each encounter
- ★ What the patient's Medicaid MCO was
- ★ The total paid by Medicaid for that DOS

We can make a fairly simple OP Report that prints out several pages of this:

Patient #	DOS	Rendering	Billing	Medicaid ID #	Total Paid \$
132	1/15/2013	RJB	RJB	JD5240951	112.33
132	2/11/2013	SKB	SKB	JD5240951	65.63
138	8/9/2013	KLH	KLH	JD4261951	112.33
140	1/9/2013	KLH	RJB	JD4694259	62.26
140	6/3/2013	SKB	SKB	JD4694259	112.33
144	3/27/2013	CBC	CLR	ZECM12947152	48.97
144	4/8/2013	CLR	CLR	ZECM12947152	38.25

We can figure out which Medicaid MCO they were in based on their Medicaid ID number – kids with JD prefixes are in plan #1, and kids with ZECM prefixes are in plan #2. We might have to clarify whether the Medicaid agency wants “provider” to be rendering provider or billing provider. We don't have to report the patients' ID numbers or their dates of service, so we can probably delete those columns.

The report needs to include grouped totals. For example, the Medicaid agency might want to know the total in Medicaid plan #1 who saw rendering provider CLR. We certainly don't want to go go through 50-100 pages of this and manually count up how many saw each provider, subdivided by plan.

But in under 5 minutes, using Pivot Tables, we can make a report that looks like this:

Patients in each MCO by rendering provider								
MCO	CBC	CLR	EAJ	KLH	RJB	SKB	Grand Total	
Amerigroup	27	243	329	326	198	149	1272	
UHCCP	72	934	661	1241	743	544	4195	
VSHP	16	140	174	173	96	74	673	
Grand Total	115	1317	1164	1740	1037	767	6140	

...and everything is nicely summarized in chart form, enough to satisfy the pickiest Medicaid bureau.

VLOOKUP

The VLOOKUP Excel function is useful for comparing the contents of two lists or tables to find elements in one table not contained in the other.

Let's say a managed care organization sends you a long list of the patients that are assigned to your panel, according for whom you are the PCP:

Patient	DOS	Insurance ID
Jeremiah Wilson	9/1/2007	MCO84870291
Frank Galloway	12/9/2013	MCO93840222
Ping Chen	4/14/2012	MCO03934810
Mary Gomez	3/23/2003	MCO83849827

OP Reports can easily create a list of your practice's active patients with that particular insurance. It does have some overlap with the MCO's list. However, it doesn't match exactly:

Patient	DOS	Insurance ID
Jeremiah Wilson	9/1/2007	MCO84870291
Frank Galloway	12/9/2013	MCO93840222
Dinah Grayson	3/21/1999	MCO92835710
Joseph Washington	7/15/2009	MCO14856514

Topical Excel Tutorials

PivotTables

- ★ <http://bit.ly/1hvRzTW>
- ★ <http://bit.ly/1IsIqhU>

VLOOKUP

- ★ <http://bit.ly/1m7zFja>

Conditional formatting

- ★ <http://bit.ly/1mBXaRp>
- ★ <http://bit.ly/1Ocz6yY>
- ★ <http://bit.ly/1YAqgzP>

Text to numbers column conversion

- ★ <http://bit.ly/1RIJhha>

SUMIF, SUMIFS, COUNTIF

- ★ <http://bit.ly/1HvmMsR>

Both you and the MCO agree that Jeremiah and Frank belong to your practice. Mary Gomez is no longer your patient; she moved away. Ping Chen has never been your patient, as far as you know. Dinah Grayson and Joseph Washington recently became part of your practice, and the MCO doesn't have them attributed to your practice yet.

Sometimes, for P4P purposes, it's useful to reconcile two medical home lists and find those in one list not present in the other (and vice versa). Instead of laboriously comparing the two lists one-by-one, the VLOOKUP function can be used. It can check to see if one name (or ID number) from one list is present in another list. You can then use the results to create sub-lists, like these:

Our patients, and MCO agrees	MCO thinks are our patients, but we say no	Our patients, but MCO doesn't think so
Frank Galloway	Ping Chen	Joseph Washington
Jeremiah Wilson	Mary Gomez	Dinah Grayson

The MCO can reassign the 2nd list of patients off your panel and move the 3rd list of patients onto your practice's panel.

Conditional Formatting

Conditional formatting is useful in that it can quickly make certain data points "pop" in a very large spreadsheet. For example, you can highlight duplicate rows in yellow; make dollar values that are below average appear in red; flag dates that are older than a specified threshold in orange.

Converting a Column of Text to a Column of Numbers

OP Reports tends to export all data as strings rather than numbers. This is fine for numbers that you aren't going to do any arithmetic with. For example, you'd never need to average zip codes or need to sum the chart numbers of the patients seen today. But some numbers, like dollar figures, you might want to sum or average.

Here is an example of an OP financial report exported to Excel.

	A	B	C	D	E	F	G	H	I
1	year	insco	insco2	pt	DOS	charge	rendering	inspd	ptpd
2	2013	AE5	none	5287	2/13/2013	\$130.00	1127	\$82.13	\$0.00
3	2013	AE5	none	9763	1/9/2013	\$875.00	105	\$365.88	\$0.00
4	2013	AE5	none	9763	2/13/2013	\$105.00	105	\$50.75	\$15.00
5	2013	AE9	none	7156	1/2/2013	\$1.38	105	\$0.00	\$1.38
6	2013	AE9	none	9636	2/6/2013	\$105.00	1544	\$0.00	\$75.78
7	2013	AE9	none	9656	1/10/2013	\$505.00	1544	\$234.03	\$0.00
8	2013	AE9	none	9656	2/6/2013	\$105.00	1544	\$0.00	\$0.00

See the little green triangles in columns F, H, and I? These show that Excel is treating those cells as text values, not number/dollar values. If you try to sum/average these fields, it will give an error message.

Thus, we want to change all the dollar values columns (F, H, and I) to actual values, not just texts. Now it looks better. No more green triangles, and you can manipulate the dollar data to your heart's content:

	A	B	C	D	E	F	G	H	I
1	year	insco	insco2	pt	DOS	charge	rendering	inspd	ptpd
2	2013	AE5	none	5287	2/13/2013	\$130.00	1127	\$82.13	\$0.00
3	2013	AE5	none	9763	1/9/2013	\$875.00	105	\$365.88	\$0.00
4	2013	AE5	none	9763	2/13/2013	\$105.00	105	\$50.75	\$15.00
5	2013	AE9	none	7156	1/2/2013	\$1.38	105	\$0.00	\$1.38
6	2013	AE9	none	9636	2/6/2013	\$105.00	1544	\$0.00	\$75.78
7	2013	AE9	none	9656	1/10/2013	\$505.00	1544	\$234.03	\$0.00

COUNTIF and SUMIF

Let's say we have some claims payment data like this, and we want to get some statistics on it. However, we're interested in separately evaluating Medicaid payments from commercial insurance payments. We can use commands like COUNTIF and SUMIF to answer questions like:

How many Medicaid payments are there in this group?
 =COUNTIF(B:B,"Medicaid")

What is the sum of the commercial payments in this group?
 =SUMIF(B:B,"commercial",C:C)

What is the average Medicaid payment in this group?
 =AVERAGEIF(B:B,"Medicaid",C:C)

	A	B	C
1	patient	payer	amount
2	7318	Medicaid	\$33.01
3	5383	commercial	\$150.86
4	2888	Medicaid	\$106.23
5	9142	commercial	\$90.44
6	7092	commercial	\$157.89
7	6744	Medicaid	\$20.22
8	5078	commercial	\$150.11
9	7377	Medicaid	\$97.77
10			

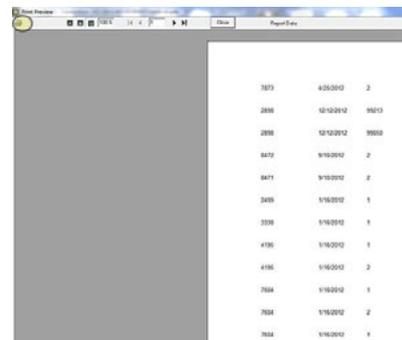
You can also use the COUNTIFS, SUMIFS, and AVERAGEIFS functions to add more than one criterion.

How Do I Export an OP Report to Excel?

(You must have a current version of Excel on your computer, of course.)

Open your OP Report in the Print Preview screen, then click the Printer icon in the upper left corner.

Tick the **"Print to File"** checkbox.



Set the **Type:** dropdown to XLS Report (not XLS Data -- keep scrolling down to find this option.) Set the **Where:** box to the file name and path where you want your Excel file saved.