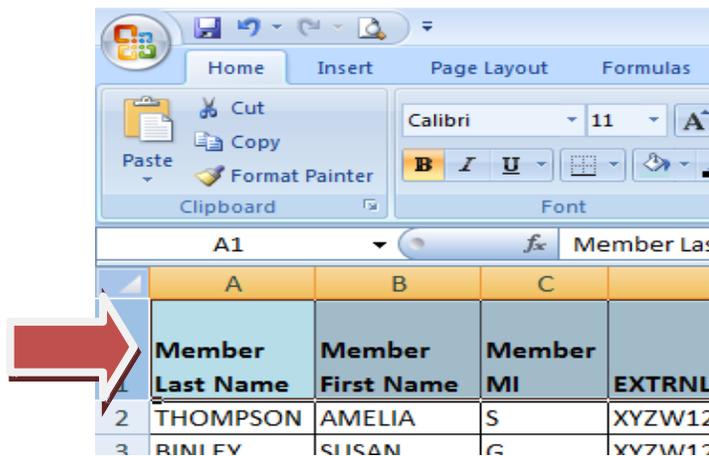


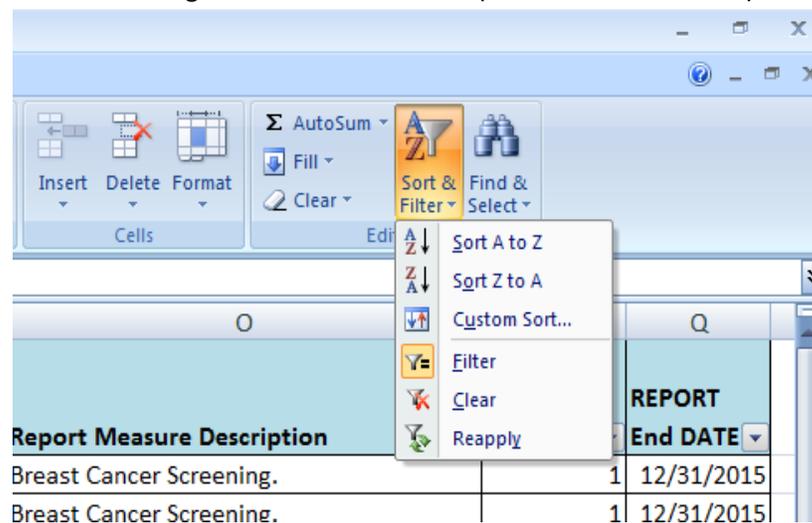
Filter and Sort Excel Spreadsheet for Patient-Level Detail Report

When you use the filter and sort option on an excel spreadsheet, it allows you to narrow down a large spreadsheet to show just the information you are wanting to see.

1. To begin this process- click on the number 1 (row number 1) on the far upper left side of your spreadsheet- this will highlight the entire top row



2. Go to the **Home** ribbon. (the band of instructions that sits directly above your patient data) In the **Edit** area to the far right click on **Sort & Filter** (see screen shot below).

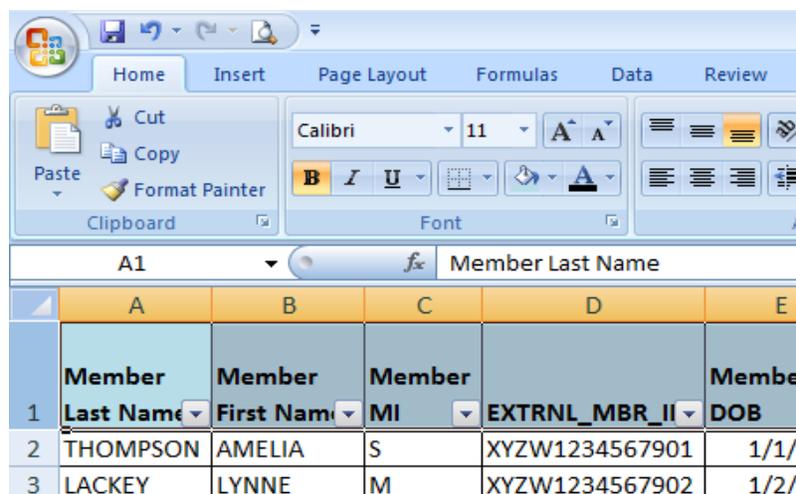


3. From the drop down menu, you will see several options:
 - **“Filter”** – this asks Excel to display only some the records, based on criteria set by you. The records are not removed, just hidden until you choose to display them again.

- **“Sort A to Z” or “Sort Z to A”**- this allows you to select data on the spreadsheet and arrange it in alphabetical order.
- **“Custom Sort”** -this is utilized to sort multiple fields in the table at same time- this is for more advanced excel users.
- **“Clear”** -This removed all filters you set- and returns the spreadsheet to its original form- and shows ALL data again.

4. First let’s filter the entire spreadsheet-

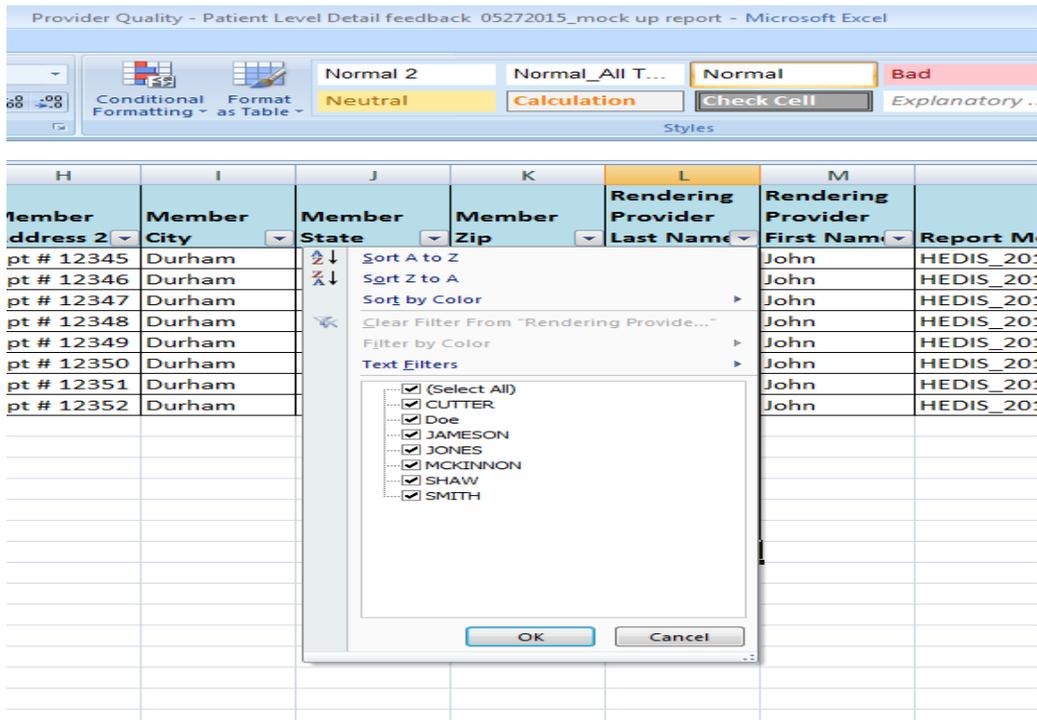
- Keeping the top row highlighted, from the drop down menu, select **“Filter”**.
- You will observe below that each column heading now has a drop down arrow next to the column heading label.



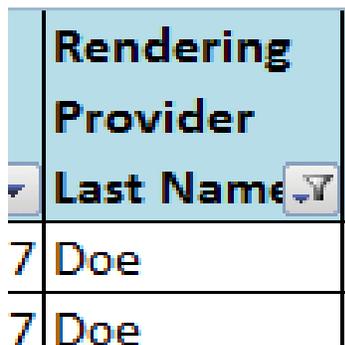
	A	B	C	D	E
1	Member Last Name	Member First Name	Member MI	EXTRNL_MBR_ID	Member DOB
2	THOMPSON	AMELIA	S	XYZW1234567901	1/1/
3	LACKEY	LYNNE	M	XYZW1234567902	1/2/

- Click on the drop down arrow next to the Column, to display the list of choices.
- Click on **“Select All”** to see all data. Click on **“Select All”** again and all check marks will be cleared. This allows you to then auto check only the specific data you want to be visible.

(In the screen shot below- you will see the drop down choices showing when the arrow next to rendering Provider last name is clicked).



- You can easily tell when a column has been filtered to show only specific data, as there is a funnel showing next to the drop down arrow. In the example below I left the checkmark only next to Dr. Doe's name.



- You may also filter multiple columns in a spreadsheet. As an example, if you want to see all patients that were attributed to Dr. Doe for Breast Cancer screening:
 - You would filter Rendering Physician last name column- to show DOE
 - You would also filter Report Measure Description (you could also filter Report Measure Name- to get same result).
 - NOTE in the screen shot below, you now see two columns filtered (as evidenced by little funnel showing next to drop down arrow). You now will see only patient lines attributed to Dr. Doe for Breast cancer Screening.

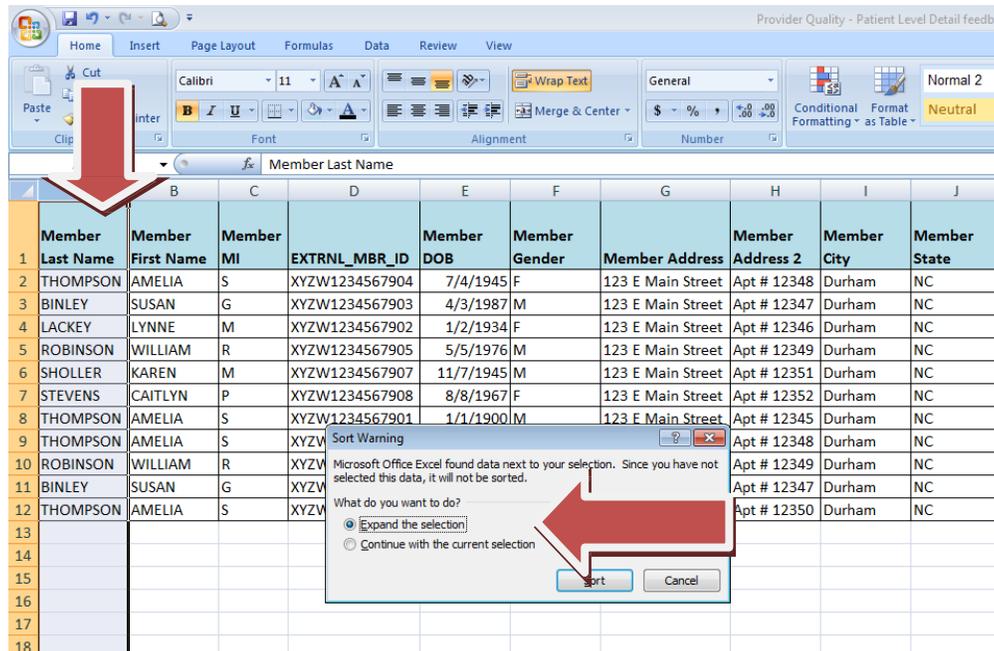
k 05272015_mock up report - Microsoft Excel

Member Zip	Rendering Provider Last Name	Rendering Provider First Name	Report Measure Name	Report Measure Description
27707	Doe	John	HEDIS_2010_BCS	Breast Cancer Screening.
27707	Doe	John	HEDIS_2010_BCS	Breast Cancer Screening.
27707	Doe	John	HEDIS_2010_BCS	Breast Cancer Screening.
27707	Doe	John	HEDIS_2010_BCS	Breast Cancer Screening.
27707	Doe	John	HEDIS_2010_BCS	Breast Cancer Screening.

- To clear all filters you would return to the home ribbon and click on “**Clear**” under “**sort and filter**”. You will then no longer see the little filters next to the drop down arrows and all lines of data will again be visible.
- If you click clear filter again- the drop down arrows also will disappear.

5. Now let’s sort data alphabetically:

- Select the column you would like to see alphabetized- such as patient last name.
- Click on the column header at the top of the column you want to alphabetize: this will highlight the entire column
- Keeping this column highlighted, Go to the **Home** Ribbon.
- In the **Edit** area to the far right, click on **Sort & Filter**.
- From the drop down menu, select **Sort A to Z** or **Sort Z to A**.
- You will get a pop-up asking if you want to expand search or just alphabetize the current selection. (see screen shot below). **For these reports- you will ALWAYS choose expand search**. This keeps all corresponding data in other columns aligned with the correct name.



- You will be now see the last names- in alphabetical order.
- As with the ability to filter multiple columns- you may also both filter and alphabetize different columns at same time. As an example- you may filter the Rendering physician last name column to show Dr Doe’s patients. Then you may want to put names in alphabetical order.

Note: Below you will see a funnel in the rendering provider Last name box. And a small arrow in the patients last name box. This allows you to quickly see that the rendering provider last name column is filtered and the Member last name column is alphabetized.

	Member Last Name	Rendering Provider Last Name
1	BINLEY	Doe
2	LACKEY	Doe
3	LACKEY	Doe
4	ROBINSON	Doe
5	SHOLLER	Doe

- Again, to clear all filters you would return to the home ribbon and click on **“Clear”** under **“sort and filter”**. You will then no longer see the little filters or arrows next to the drop down arrows and all lines of data will again be visible.
- If you click clear filter again- the drop down arrows also will disappear.