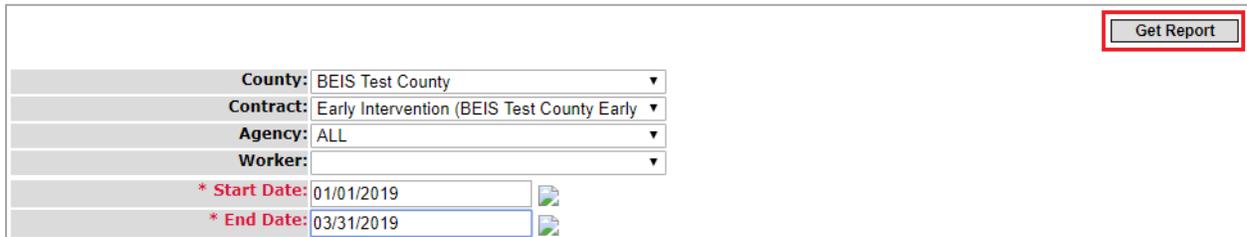# SOP Extract Instructions and Tips

This report includes information regarding determination of ability to pay as documented on form EI-15 for all records with SOP documentation in the user-specified timeframe.

Run and save the report

Navigate to the ***SOP Extract*** on the **Reports** tab. Enter the desired date range and select the county. Then press "Get Report."


The default file format is CSV. In order to be able to utilize all functionality, save the file as an Excel file. To do so, click "Save As" and select the desired location. Type in the file name and select "Excel Workbook" in the "Save as type" field. Then press "Save."
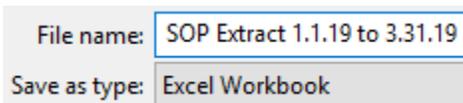

Sorting and Filtering

To utilize filters, first highlight the top row of the file that includes the field names. Then, navigate to the "Data" tab at the top of the file, then to the "Sort & Filter Section" and select "Filter."
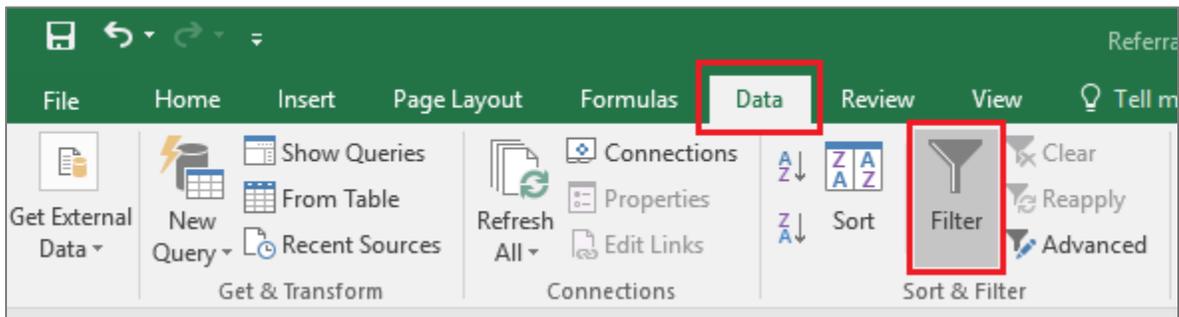
Click on the filter button in any column to sort or filter data as desired. For example, to sort the file so that data are in order based on the date the EI-15 was completed, navigate to the "Date_of_Parent_Signature" column, click on the filter button, and select "Sort Oldest to Newest" or "Sort Newest to Oldest."
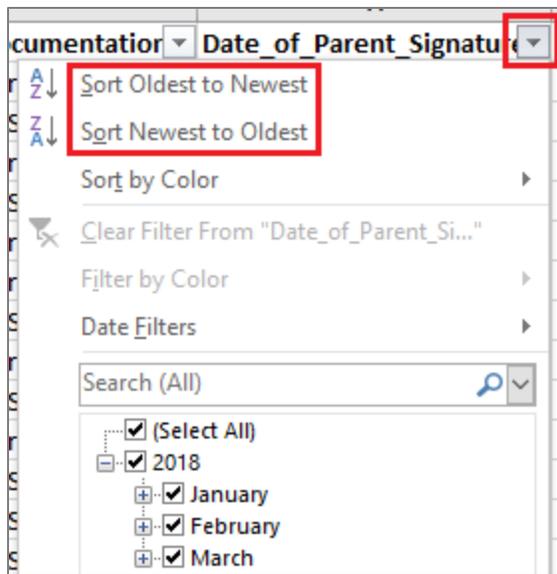
Data can also be filtered to only display selected information. For example, to select only records for which a Medicaid card was used to determine inability to pay for EI services, navigate to the "Documentation" field and click on the filter button. Select "Ohio Medicaid Card" then click "OK."
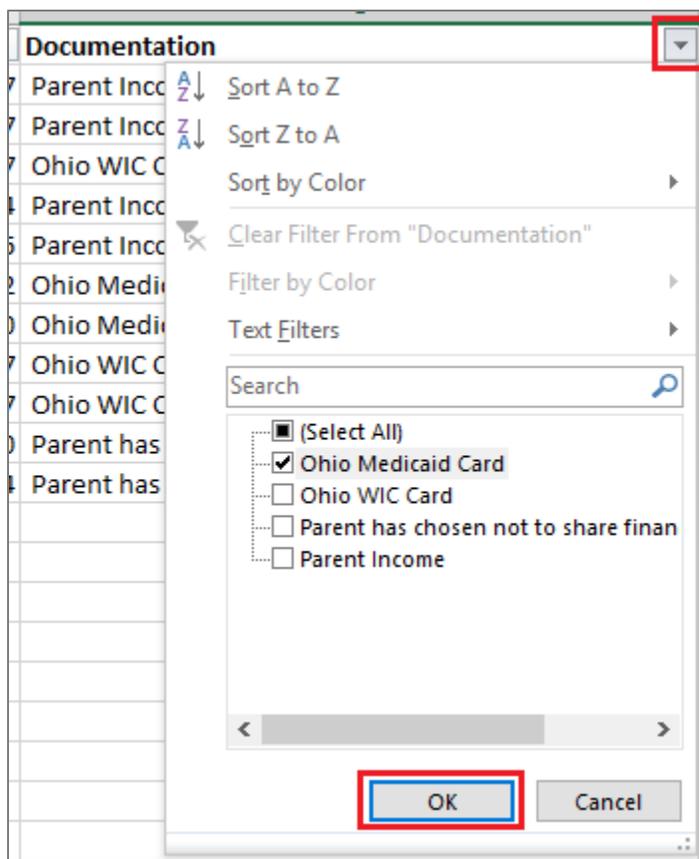
To utilize only a subset of the data, use filters to select the desired data, then copy and paste the data into a different tab. Alternatively, use filters to select unneeded data, delete the rows, then remove the filter to view desired data.

Pivot Tables

Pivot tables are a useful tool to quickly see a breakdown of data or to utilize filters without deleting information out of the file. Navigate to the "Insert" tab and then select "Pivot Table" in the "Tables" section.
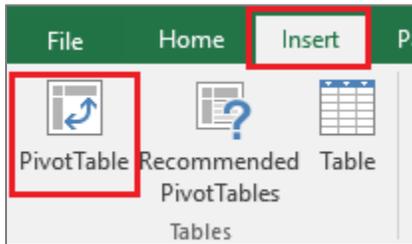
A box will pop up with options for creating the pivot table. The default table range should cover all the data in the file. Select whether the table is placed in a new worksheet or the current worksheet, then press "OK."
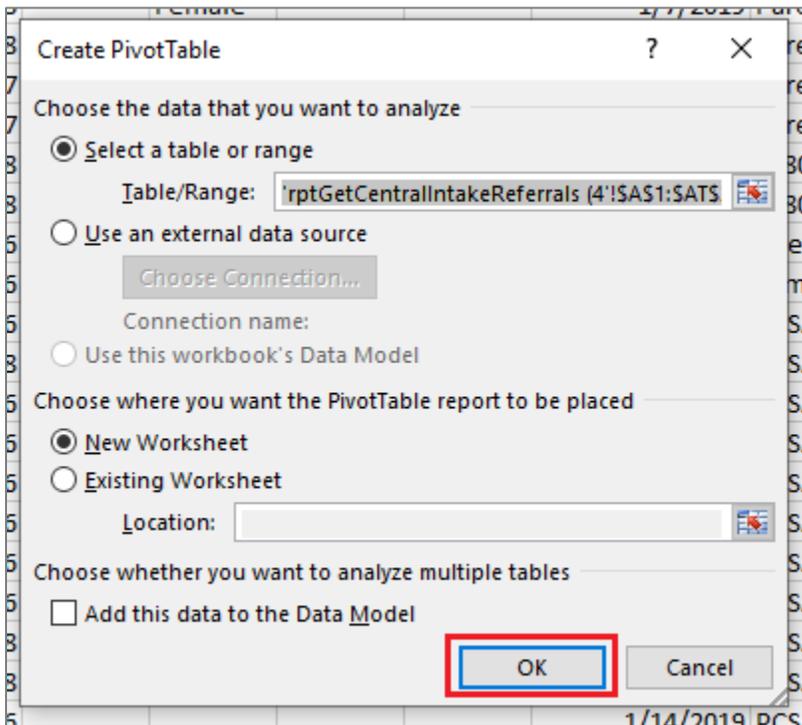
Drag fields of interest to the appropriate box below the pivot table fields. For example, to see how many families were determined able and how many determined unable to pay for EI services, drag the "I_have_seen_and_reviewed_the_documentation_provided_by_the_parent_per_OAC_5123_2_10_03_ _D__and_have_determined_the_parent_is" field to the "ROWS" and "VALUES" boxes.
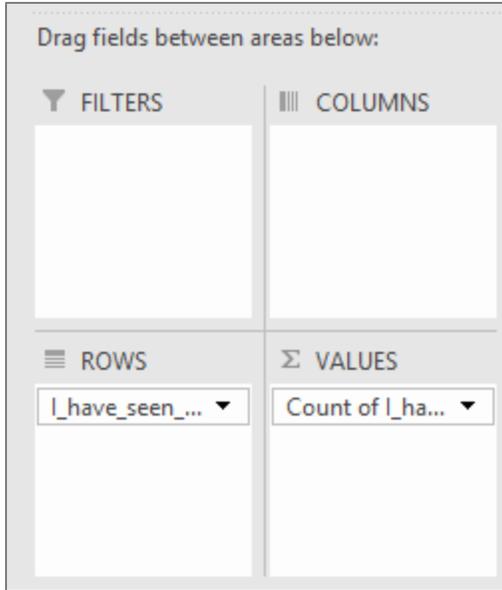
The table now displays the number of families determined able and unable to pay for EI services.

Row Labels	Count of I_have_seen_a
Able to pay for Early Intervention Services	7
Unable to pay for Early Intervention Services	7
Grand Total	14

Need Additional Resources or Assistance?

See the more comprehensive "Using Data in Excel" document for instructions on how to perform many other functions in Excel. If you have specific questions regarding how to obtain needed information from this or any report, email eids@dodd.ohio.gov at any time.