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."

County:	BEIS Test County	۲
Contract:	Early Intervention (BEIS Test County Early	•
Agency:	ALL	۲
Worker:		۲
* Start Date:	01/01/2019	
* End Date:	03/31/2019	

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."

File name:	SOP Extract 1.1.19 to 3.31.19	
Save as type:	Excel Workbook	

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 El services, navigate to the "Documentation" field and click on the filter button. Select "Ohio Medicaid Card" then click "OK."

	Documentatio	on 💌
7	Parent Incc A	↓ <u>S</u> ort A to Z
7	Parent Incc Z	↓ S <u>o</u> rt Z to A
7	Ohio WIC C	Sort by Color
ŀ	Parent Incc	Class Files From "Decomposition"
5	Parent Incc	Clear Filter From "Documentation"
2	Ohio Medio	F <u>i</u> lter by Color ▶
þ	Ohio Medio	Text <u>F</u> ilters
7	Ohio WIC C	Search D
1	Ohio WIC C	
þ	Parent has	Ohio Medicaid Card
ŀ	Parent has	
		Parent has chosen not to share finan
		Parent Income
_		< >
		OK Cancel .:

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."

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8	Create PivotTable ?	× re			
7 7	Choose the data that you want to analyze	re			
2	Select a table or range	20			
2	Table/Range: 'rptGetCentralIntakeReferrals (4'!\$A\$1:\$AT\$.	1			
5	O Use an external data source				
5	Choose Connection				
5	Connection name:	S/			
R	O Use this workbook's Data Model				
5	Choose where you want the PivotTable report to be placed				
5	New Worksheet	s			
5	O Evisting Worksheet	57			
5					
-					
2	Choose whether you want to analyze multiple tables	54			
	Add this data to the Data <u>M</u> odel	54			
5	OK Cance	el 5/			
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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.

Drag fields between areas below:				
T FILTERS				
ROWS	Σ VALUES			
I_have_seen ▼	Count of I_ha 🔻			

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 <u>eids@dodd.ohio.gov</u> at any time.