

## **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."

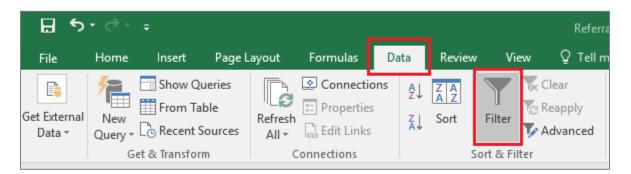
	BEIS Test County		۲
Contract:	Early Intervention (BEIS Test	County Early	۲
Agency:	ALL		۲
Worker:			۲
* Start Date:	01/01/2019		
* End Date:	03/31/2019		

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."

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r⊉↓	Sort Oldest to Newest		
S∡↓	S <u>o</u> rt Newest to Oldest		
r c	Sor <u>t</u> by Color 🕨 -		
<b>.</b>	Clear Filter From "Date_of_Parent_Si"		
r	Filter by Color		
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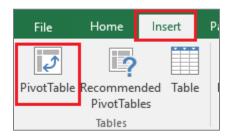
Data can also be filtered to only display selected information. For example, to select only records for which a Medicaid card was used to determine inability to pay for El services, navigate to the "Documentation" field and click on the filter button. Select "Ohio Medicaid Card" then click "OK."

	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		-
5	Parent Incc	<u>Clear Filter From "Documentation"</u>	
2	Ohio Medio	Filter by Color	۰
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7	Ohio WIC C		
)	Parent has	····■ (Select All) ·····▼ Ohio Medicaid Card	
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		Parent has chosen not to share finan	ŀ
		····· Parent Income	
		< >	H
		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
8	Select a table or range	
8	Table/Range: 'rptGetCentralIntakeReferrals (4'!SAS1:	
5	O Use an external data source	e
5	Choose Connection	m
5	Connection name:	S
8	<ul> <li>Use this workbook's Data Model</li> </ul>	S/
5	Choose where you want the PivotTable report to be placed	S/
5	<u>N</u> ew Worksheet	S/
5	○ <u>E</u> xisting Worksheet	S/
5	Location:	🐹 S/
5	Choose whether you want to analyze multiple tables	S
5	Add this data to the Data Model	S/
3	ОК	Cancel
В		SI
5	1/1/	1/2019 PCS

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:		
<b>FILTERS</b>		
ROWS	$\Sigma$ 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	
Unable to pay for Early Intervention Services	
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@childrenandyouth.ohio.gov at any time.