Ohio | Department of
Developmental Disabilities

Service Coordinator Caseload Summary Instructions and Tips

This report includes all children on the specified Service Coordinator's caseload at the time the referral is made, along with other summary information about each child.

Run and save the report

Navigate to the **Service Coordinator Caseload Summary** on the **Reports** tab. Select the appropriate dropdown choice for County, Agency, and Worker and select "Excel" as the Report Format. Then press "Get Report."

County:	BEIS Test County ▾
Contract:	Early Intervention (BEIS Test County Early ▾
Agency:	ALL ▾
Worker:	▾
*Report Format:	Excel ▾

The default file format is CSV. In order to be able to utilize all functionality, save the file as a newer version. 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."

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File name:	SC Caseload Summary 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."
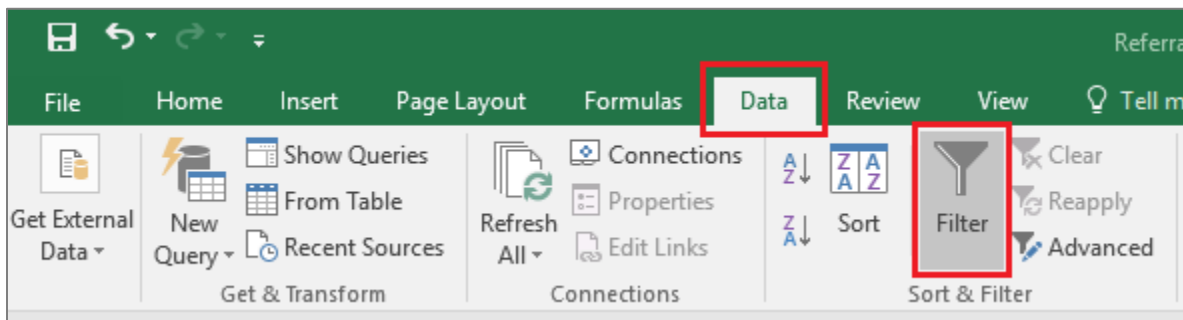
Click on the filter button in any column to sort or filter data as desired. For example, to sort the file so that data are in order based on the number of days since the most recent IFSP, navigate to the "Days since Most Recent IFSP" column, click on the filter button, and select, "Smallest to Largest" or "Largest to Smallest."
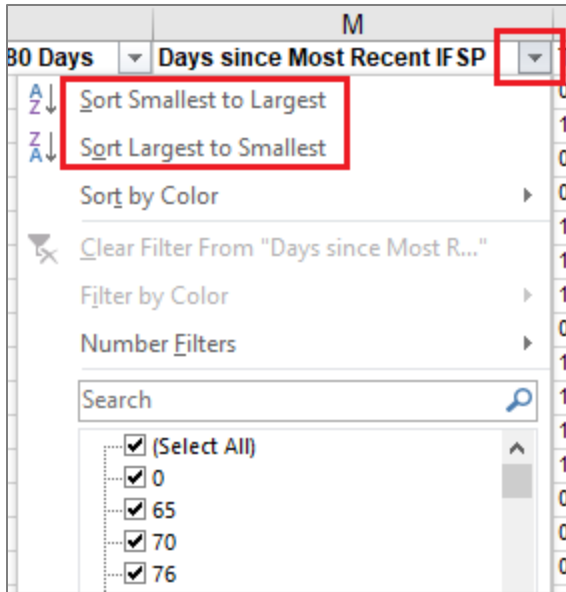
Data can also be filtered to only display selected information. For example, to select only children who have not yet had a TPC entered into EIDS, navigate to the "TPCdate" field, and click on the filter button. Select the "Blanks", then click "OK."
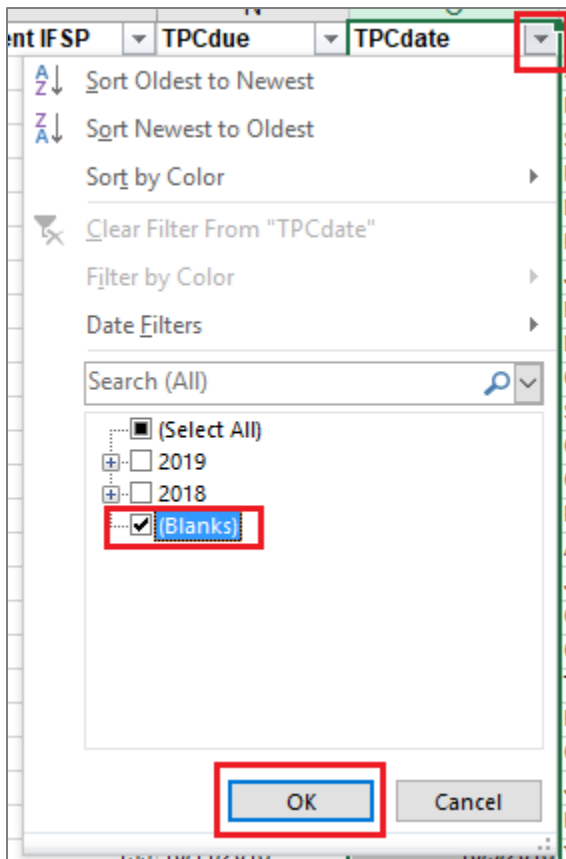
To utilize only a subset of the data, use filters to select the desired data, then copy and paste the data into a different tab. Alternatively, use filters to select unneeded data, delete the rows, then remove the filter to view desired data.

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.
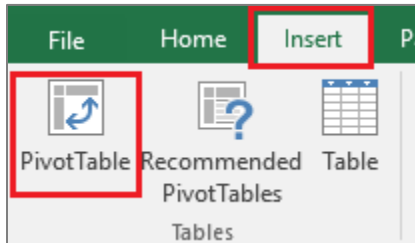
A box will pop up with options for creating the pivot table. The default table range should cover all the data in the file. Select whether the table is placed in a new worksheet or the current worksheet, then press "OK."
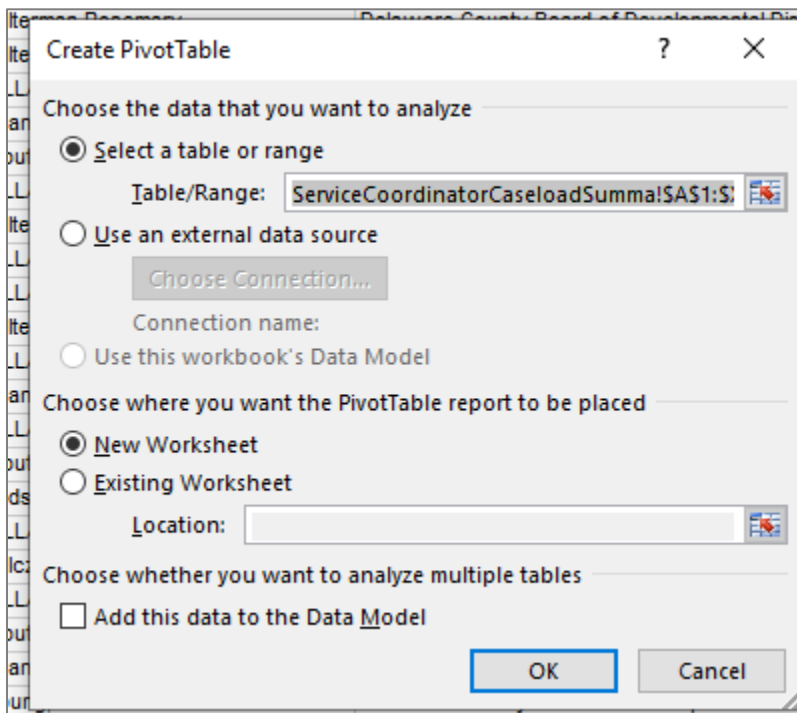
Drag fields of interest to the appropriate box below the pivot table fields. For example, to see how many children are on each Service Coordinator's caseload (for those who have the ability to pull the data for multiple Service Coordinators), drag the "Service Coordinator Name" field to the "ROWS" and "VALUES" boxes.
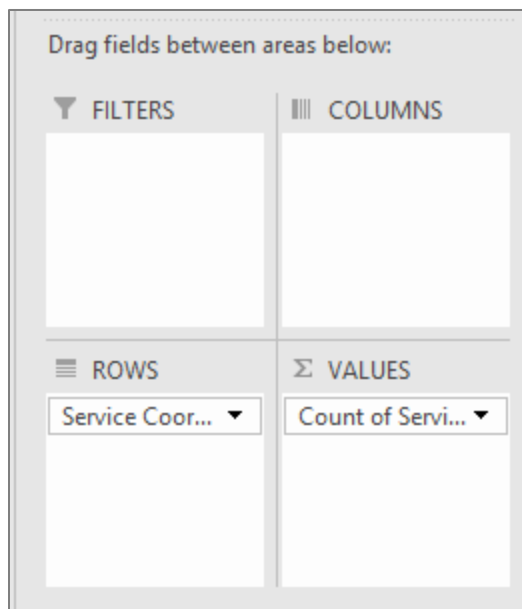
The table then displays the number of children on each Service Coordinator's caseload.

Row Labels	Count of Service Coordinator Name
Coordinator,Service	1
Service Coordinator,Susie	6
Test,Service Coordinator	49
Grand Total	56

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.