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# **Carving Up and Drilling Down: Using Microsoft Excel's Pivot Table Feature to Analyze your Practice**



# Introduction

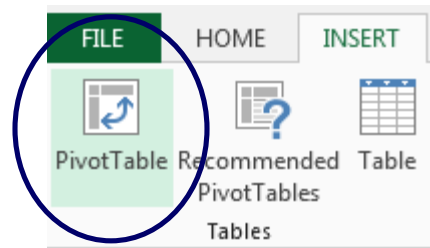
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- Who (name)
- Where (responsibilities)
- What (make sure you cover this...)

# Create a Pivot Table from sample Excel Data

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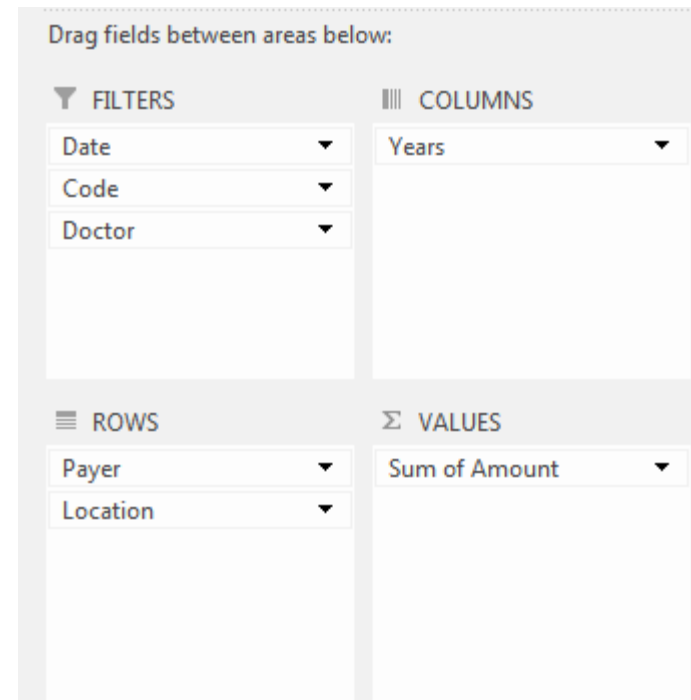
Create a Pivot Table from the Insert tab (Excel 2013/2016 also has Recommended Pivot Tables)



# Create a Pivot Table from sample Excel Data

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Add and remove rows and columns using the Pivot Table Field List



# Filter and Sort Data

- Sort A-Z and Z-A
- Manual sort
- Basic manual filters

Select field:  
Payer

A Z ↓ Sort A to Z  
Z A ↓ Sort Z to A

More Sort Options...

Clear Filter From "Payer"

Label Filters ▶

Value Filters ▶

Search

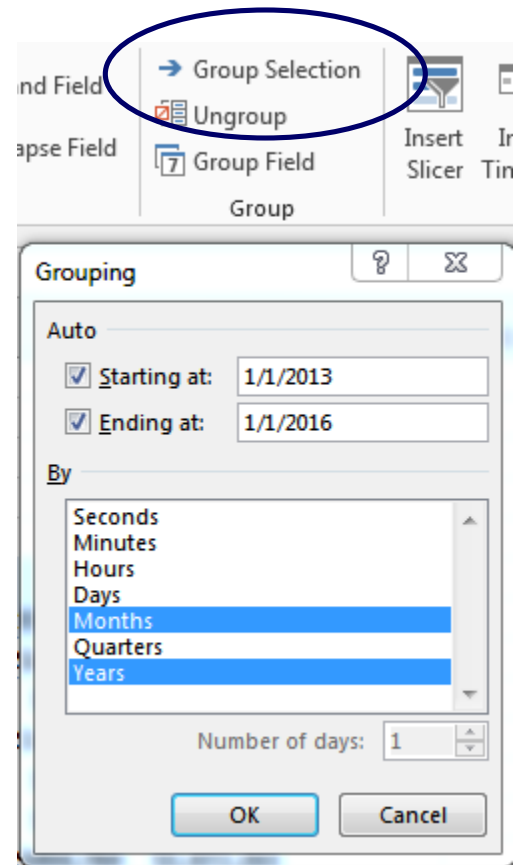
(Select All)  
 AETNA  
 Blue Cross  
 CIGNA  
 Coventry  
 Medicare  
 Patient

OK Cancel



# Pivot and Group Data

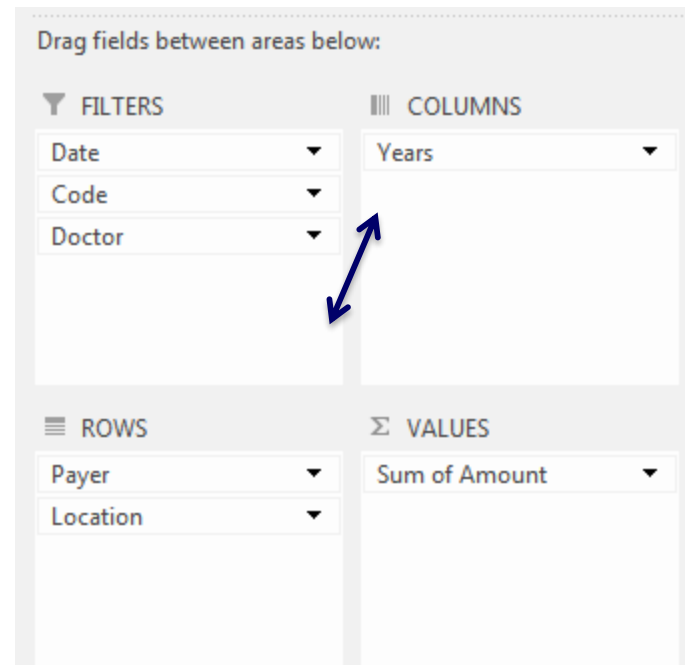
Group and ungroup items and dates





# Pivot and Group Data

Pivot rows and columns by dragging in Pivot Table Field List



# Pivot and Group Data

Collapse and expand groups with and without +/- buttons



A screenshot of a PivotTable's 'Row Labels' list. The list includes 'AETNA', 'Blue Cross', 'CIGNA', 'Coventry', 'Medicare', and 'Patient', followed by a 'Grand Total' row. Each item has a small square button to its left containing a plus sign (+) for expansion or a minus sign (-) for collapse. The 'AETNA' item is currently collapsed, showing a plus sign.

Row Labels
+ AETNA
+ Blue Cross
+ CIGNA
+ Coventry
+ Medicare
+ Patient
Grand Total





# Create a Pivot Table from sample Excel Data

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Double click any value in the Pivot Table to drill down to detail

Date	Amount	Payer	Payor Type	State	Referring Physician	Location	Doctor	Dx	Patient	Code
7/24/2013	690.12	AETNA	Primary	CA	Dr. The Wizard and I	Jacksonville	Dr. Valet	Shoulders	Carson, Emma	34557
2/20/2013	980.96	AETNA	Primary	CA	Dr. Dancing Through Life	Jacksonville	Dr. Map	Ears	Nunez, Claire	81335
6/5/2013	332.52	AETNA	Primary	CA	Dr. Dear Old Shiz	Jacksonville	Dr. Florida	Eyes	Cruz, Carrie	84815
12/4/2013	546.93	AETNA	Primary	WA	Dr. I'm Not That Girl	Jacksonville	Dr. Florida	Mouth	Castro, Saul	41673
3/28/2013	200.62	AETNA	Primary	CA	Dr. Defying Gravity	Jacksonville	Dr. Jailor	Mouth	Drake, Brandon	97131
2/5/2013	274.69	AETNA	Primary	CA	Dr. What is this Feeling	Jacksonville	Dr. Jailor	Ears	Pena, Pearl	44879
4/4/2013	673.75	AETNA	Primary	CA	Dr. Dancing Through Life	Jacksonville	Dr. Florida	Knees	Ford, Rufus	66155
7/27/2013	290.95	AETNA	Primary	CA	Dr. Dear Old Shiz	Jacksonville	Dr. Florida	Head	Walters, Edmund	60593
3/22/2013	905.4	AETNA	Primary	AZ	Dr. I'm Not That Girl	Jacksonville	Dr. Map	Nose	Mitchell, Christie	46115
2/3/2013	425.37	AETNA	Primary	WA	Dr. Dancing Through Life	Jacksonville	Dr. Piano	Head	Vasquez, Delores	27023
5/1/2013	935.05	AETNA	Primary	CA	Dr. Popular	Jacksonville	Dr. Jailor	Eyes	Reynolds, Bradley	38256
10/17/2013	55.34	AETNA	Primary	CA	Dr. I'm Not That Girl	Jacksonville	Dr. Valet	Mouth	Curtis, James	76012
7/2/2013	793.71	AETNA	Primary	CA	Dr. Defying Gravity	Jacksonville	Dr. Valet	Ears	Peters, Phillip	43561

# Generate Pivot Table Calculations

- Right-click in values area (Sum of Amount)
- Choose Value Field Settings

The screenshot displays a PivotTable interface with the following components:

- FILTERS:** Date, Code, Doctor
- COLUMNS:** Years
- ROWS:** Payer, Location
- VALUES:** Sum of Amount

A right-click context menu is open over the 'Sum of Amount' field in the VALUES area. The menu items are:

- Move Up
- Move Down
- Move to Beginning
- Move to End
- Move to Report Filter
- Move to Row Labels
- Move to Column Labels
- Move to Values
- Remove Field
- Value Field Settings...

The 'Value Field Settings...' option is highlighted in green, and both the 'Sum of Amount' field in the VALUES area and the 'Value Field Settings...' menu item are circled in blue. Arrows point from the list items to these circled elements.



# Generate Pivot Table Calculations

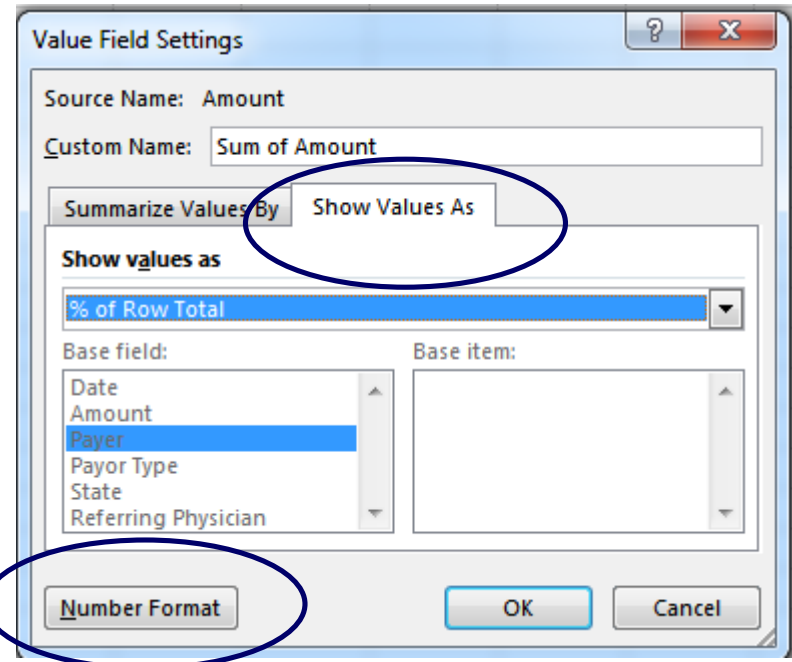
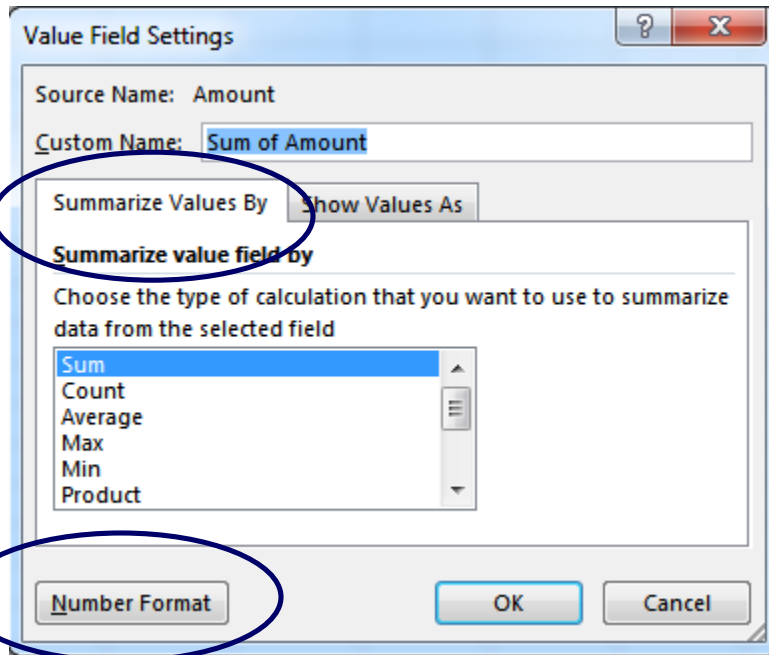
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- Sum, count, average, max, min in values area (Summarize Values By)
- % of row/column, difference between columns, etc. (Show Values As)

# Generate Pivot Table Calculations

Summarize Values By (sum, count, average) OR

Show Values As (% of row, % of column, difference)

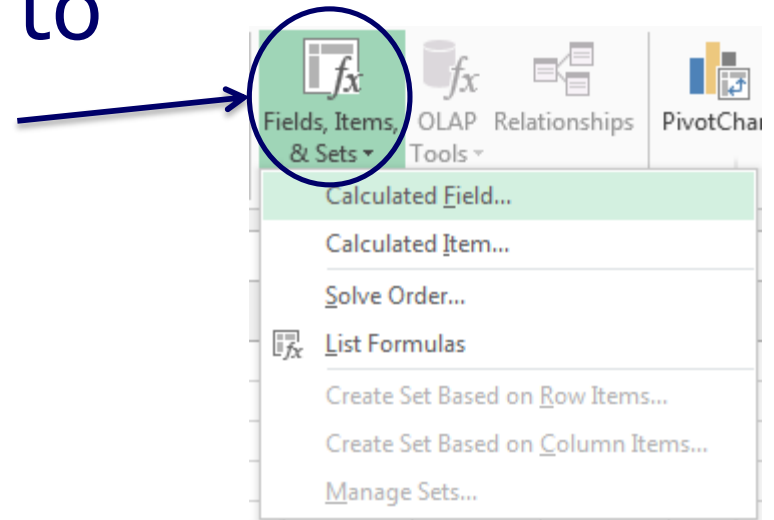




# Generate Pivot Table Calculations

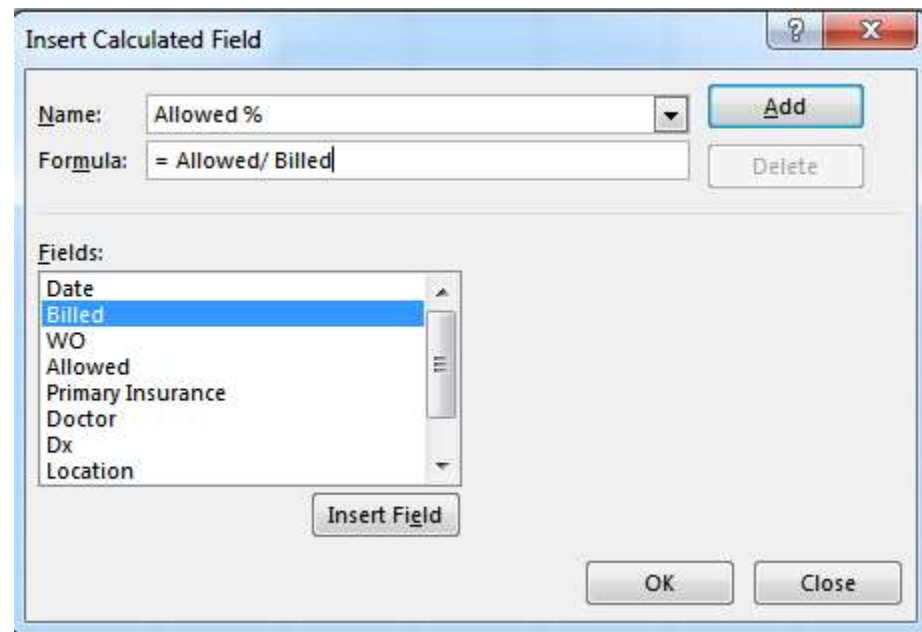
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Add calculated fields to a Pivot Table here



# Generate Pivot Table Calculations

Use calculated fields to make calculations inside the Pivot Table based on Pivot Table fields







# Generate Pivot Table Calculations

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<b>GETPIVOTDATA</b>	<b>Formulas referencing Pivot Table Cells</b>
Always references the exact cell in the formula	Cell reference changes when you copy the cell
Complicated formula, hard to copy and paste	Standard Excel formula makes it easy to copy and paste
Doesn't change as data as added to a Pivot Table	Needs maintenance as data is added to a Pivot Table

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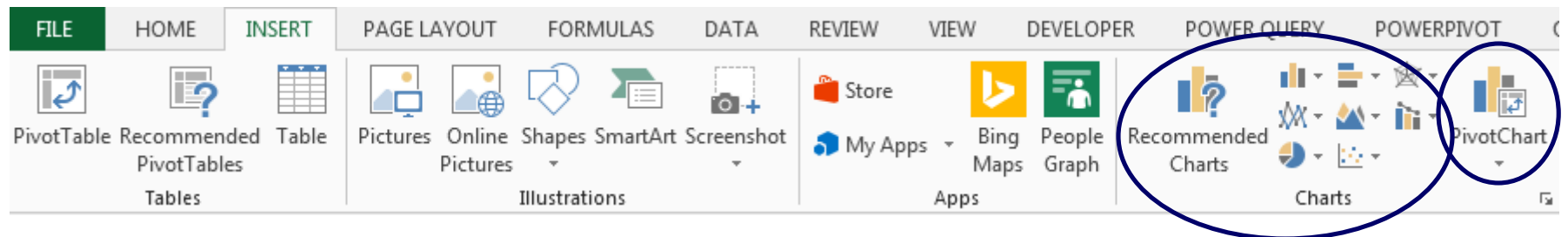
# Understand Pivot Table Design Options

- Styles
- Band (shade) rows and columns
- Report layout options
- Subtotals and grand totals



# Introducing Pivot Charts

- Create Pivot Charts from existing Pivot Table data
- Create Pivot Charts from scratch





# Next Steps

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## Watch Excel Videos

[mooresolutionsinc.com/pivottables](http://mooresolutionsinc.com/pivottables)





# Nate Moore



[MooreSolutionsInc.com](http://MooreSolutionsInc.com)



**PivotTableGuy**

