Excel Tips for Measures Quality Assurance Reports

This document provides instructions on:

> How to freeze header rows
> How to add filters to column headers
> How to sort and filter data
> How to find and replace data

How to freeze header rows

Freezing header rows allows you to continue to view headers while scrolling through a document.
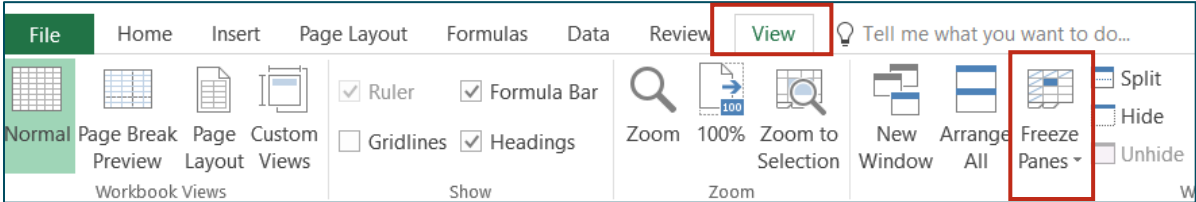
This section includes written instructions on how to freeze header rows in Excel. If you prefer a video tutorial, follow this link to the Microsoft Office Support website: https://support.microsoft.com/en-us/office/freeze-panes-to-lock-rows-and-columns-dab2ffc9-020d-4026-8121-67dd25f2508f

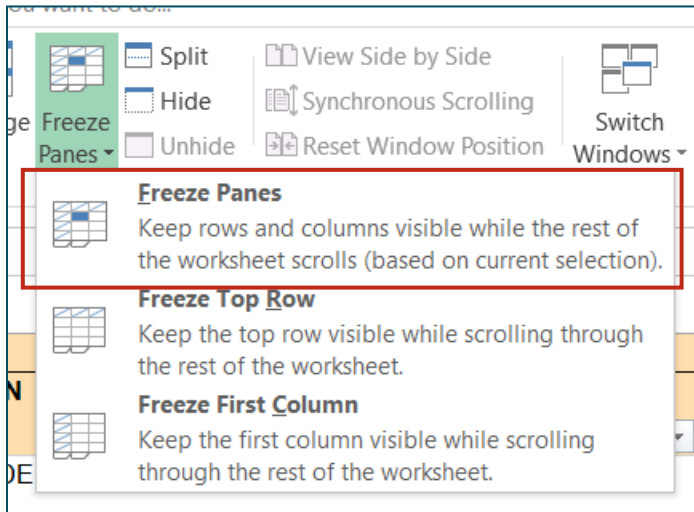To freeze header rows in the Measures QA report:

1. Click in cell B3 to let Excel know you want to freeze the top two rows.
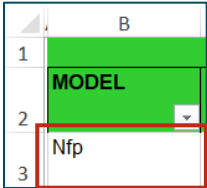
2. Find the **View** tab in the navigation ribbon at the top of the Excel screen, then select **Freeze Panes**.

3. Select **Freeze Panes** in the drop-down menu to keep the top two rows locked while the rest of the worksheet scrolls.

How to add filters to column headers

Filters are a useful tool to temporarily hide some data and focus on the data you want to see.

This section includes written instructions on how to set up filters in an Excel table. If you prefer a video tutorial, follow this link to the Microsoft Office Support website: https://support.microsoft.com/en-us/office/filter-data-in-a-range-or-table-01832226-31b5-4568-8806-38c37dcc180e.
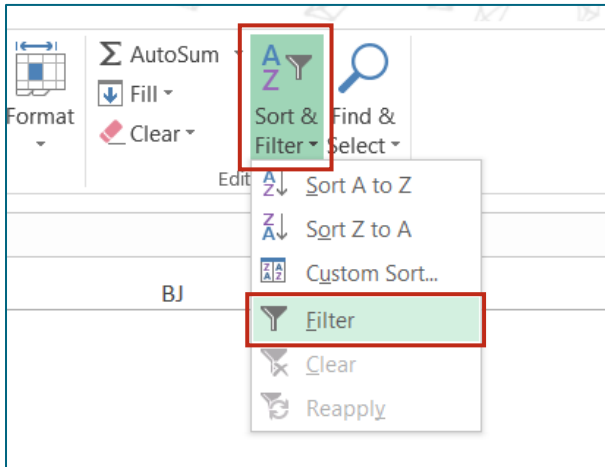
To set up filters in the Measures QA report Guardian tab:

1. Select all column header cells. In the Guardian tab, the headers are cells B2 to BH.

2. Select **Filter** in the Home tab of the navigation ribbon.
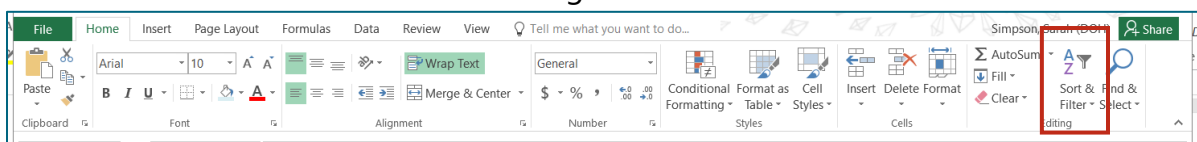
3. Select on **Sort & Filter** and then **Filter** from the drop-down menu.

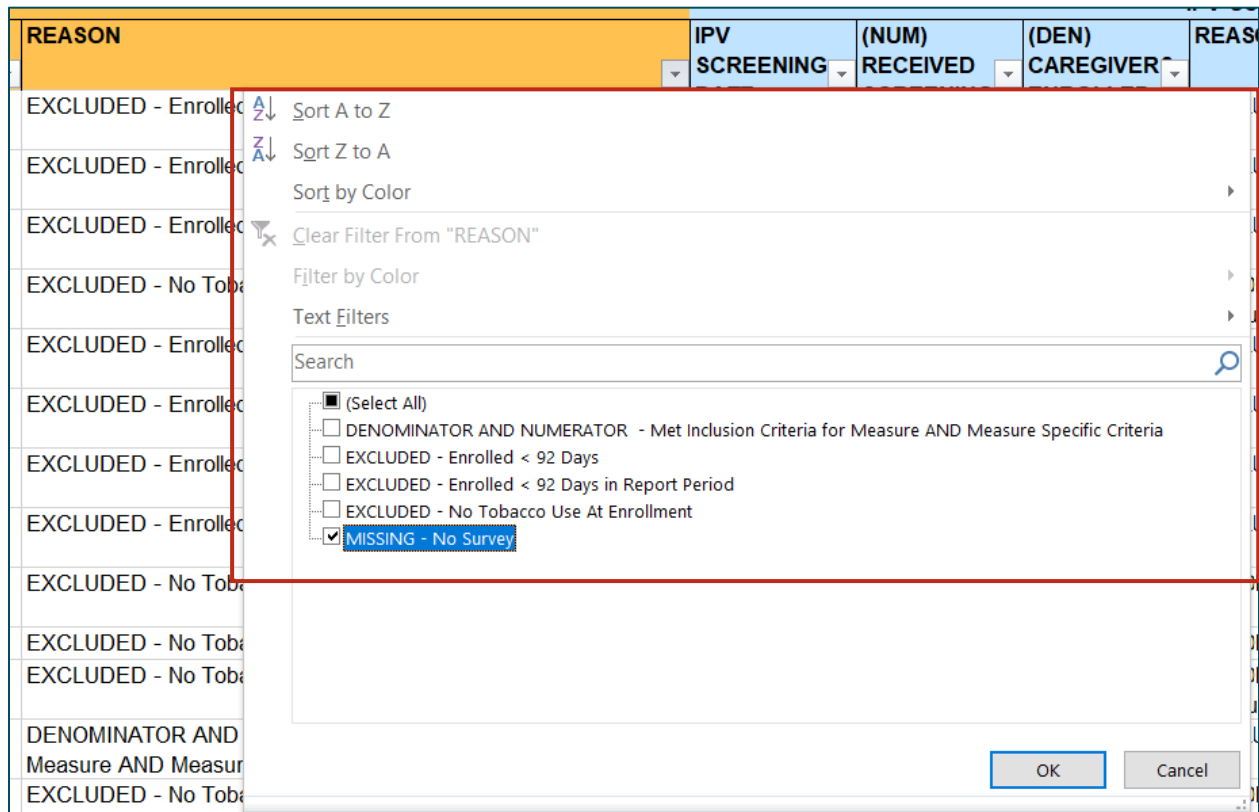Following these steps will add a drop down arrow to each header cell.

Washington State Department of
Health

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How to sort and filter data

In the Measures QA report, sorting and filtering data in the *Reason* columns is useful to identify caregivers who are missing data. You may also want to sort and filter by *Home Visitor ID* to provide home visitors with data for only the families they serve.

Using the Tobacco Cessation Referrals measure as an example, select the column header arrow [▼] next to the *Reason* cell in the Tobacco Cessation section (cell AP2).

This will bring up a drop-down menu. To sort, select **Sort A to Z** or **Sort Z to A**. To filter, **uncheck the boxes** next to the reasons you want to hide. The box next to the reason you want to see should remain checked.


Once caregivers with a missing reason are identified, you can evaluate:
1) Was the "missing" data collected?
   a. If no, is there still time to collect it?
   b. If yes, has it been entered into your data system?
2) Is the data available in your local data system, but not populated in the Measures QA Report?

If you find discrepancies between your data system and the Measures QA report, please reach out to the DOH home visiting team at homevisiting@doh.wa.gov.
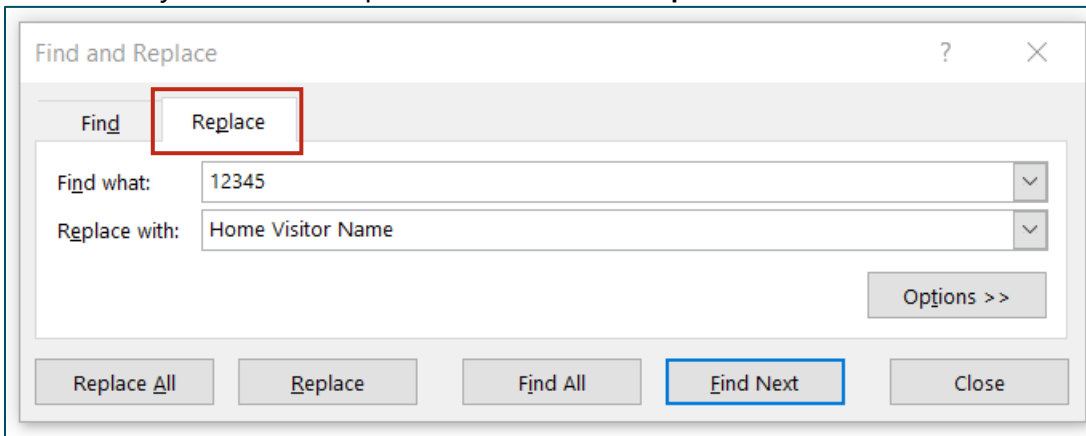
How to find and replace data

1. Select **Find & Select** in the far right corner of the home tab on the navigation ribbon.
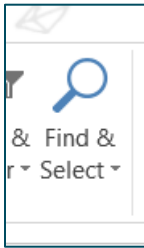
2. In the drop-down menu, select **Replace.**
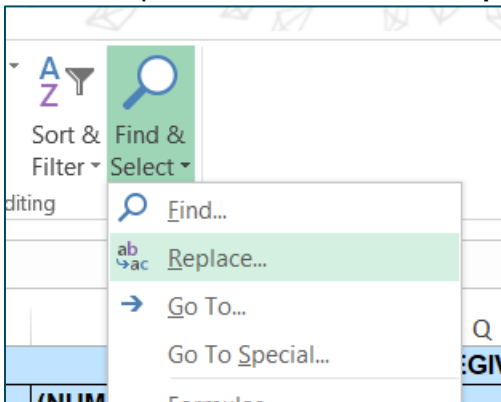
3. Click on the **Replace** tab, then enter what you want to find in the **Find what:** field. Enter what you want to replace it with in the **Replace with:** field.

   Excel will find all instances of what you typed in the **Find what:** field and replace them with what you typed in the **Replace with:** field.

Please reach out to the DOH home visiting team at homevisiting@doh.wa.gov if you have questions about these instructions or the Measures QA reports general.