

# 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](#)

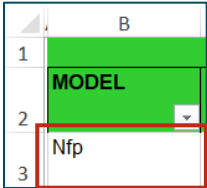
## How to freeze header rows

Freezing header rows allows you to continue to view headers while scrolling through a document.

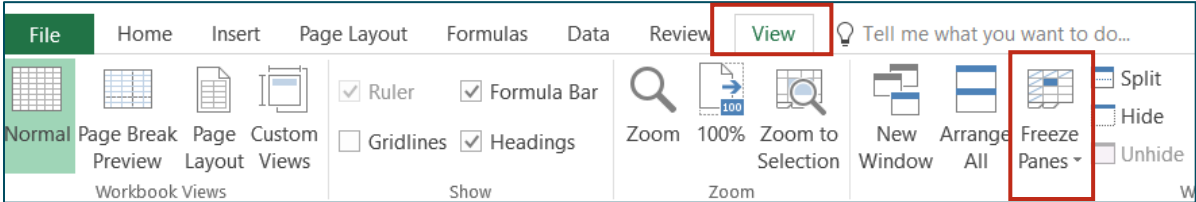
This section includes written instructions on how to freeze header rows in Excel. If you prefer a video tutorial, follow this link to the Microsoft Office Support website: <https://support.microsoft.com/en-us/office/freeze-panes-to-lock-rows-and-columns-dab2ffc9-020d-4026-8121-67dd25f2508f>

To freeze header rows in the Measures QA report:

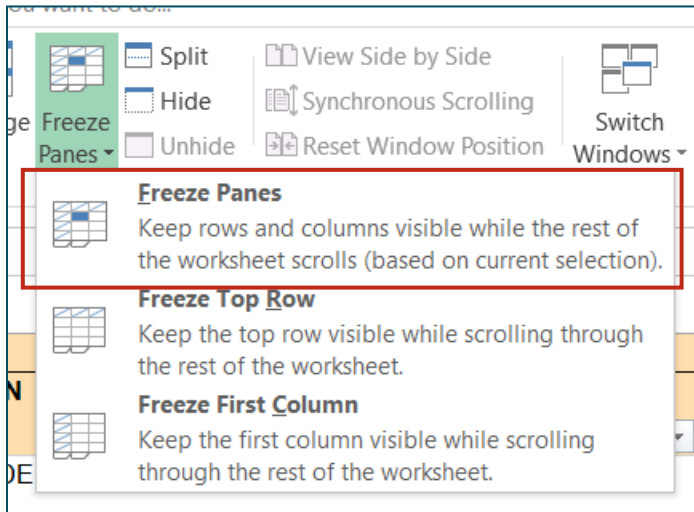
1. Click in cell B3 to let Excel know you want to freeze the top two rows.



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.

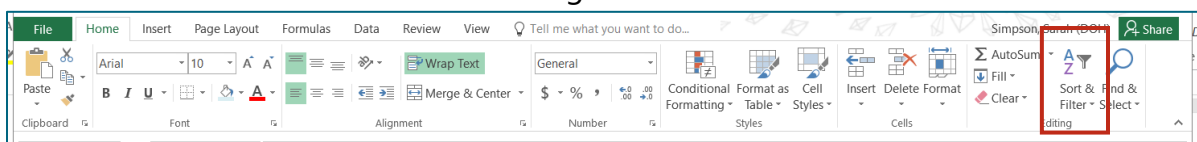
This section includes written instructions on how to set up filters in an Excel table. If you prefer a video tutorial, follow this link to the Microsoft Office Support website: <https://support.microsoft.com/en-us/office/filter-data-in-a-range-or-table-01832226-31b5-4568-8806-38c37dcc180e>.

To set up filters in the Measures QA report Guardian tab:

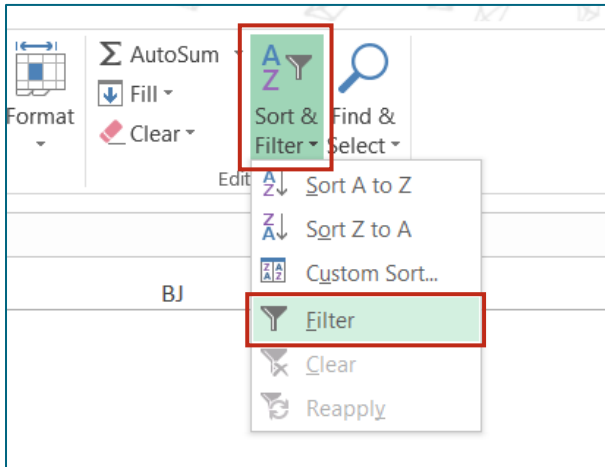
1. Select all column header cells. In the Guardian tab, the headers are cells B2 to BH.

	B	C	D	E	F	G	H	
1	CAREGIVER							
	MODEL	SITE NAME	SITE ID	FUNDING SOURCE	HOME VISITOR ID	FAMILY ID	GUARDIAN ID	CASE NUMBER
2								

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.

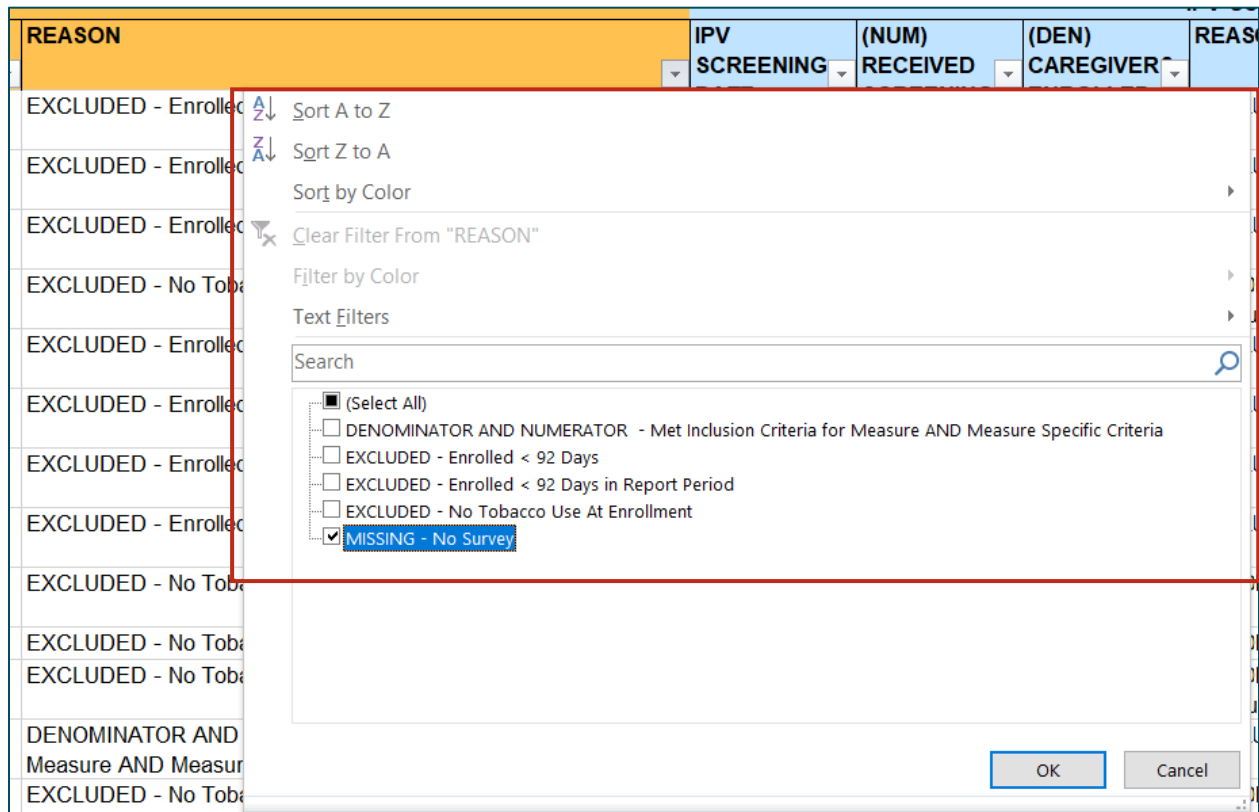
	B	C	D	E
1	MODEL	SITE NAME	SITE ID	FUNDING SOURCE
2				

## 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.



The screenshot shows a table with columns: REASON, IPV SCREENING, (NUM) RECEIVED, (DEN) CAREGIVER, and REAS. The REASON column is highlighted in orange. A dropdown menu is open over the REASON column, showing options for sorting (Sort A to Z, Sort Z to A, Sort by Color) and filtering (Clear Filter From "REASON", Filter by Color, Text Filters). A search box is present in the filter menu. The filter menu is checked for "(Select All)", "DENOMINATOR AND NUMERATOR - Met Inclusion Criteria for Measure AND Measure Specific Criteria", "EXCLUDED - Enrolled < 92 Days", "EXCLUDED - Enrolled < 92 Days in Report Period", "EXCLUDED - No Tobacco Use At Enrollment", and "MISSING - No Survey". The "MISSING - No Survey" option is highlighted in blue. The "OK" and "Cancel" buttons are visible at the bottom right of the filter menu.

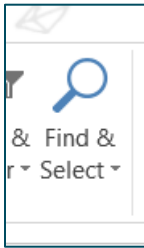
Once caregivers with a missing reason are identified, you can evaluate:

- 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?

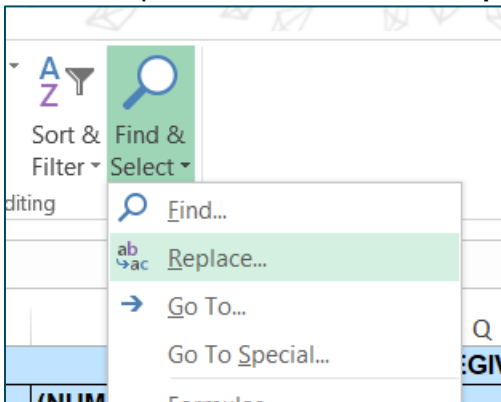
If you find discrepancies between your data system and the Measures QA report, please reach out to the DOH home visiting team at [homevisiting@doh.wa.gov](mailto:homevisiting@doh.wa.gov).

## How to find and replace data

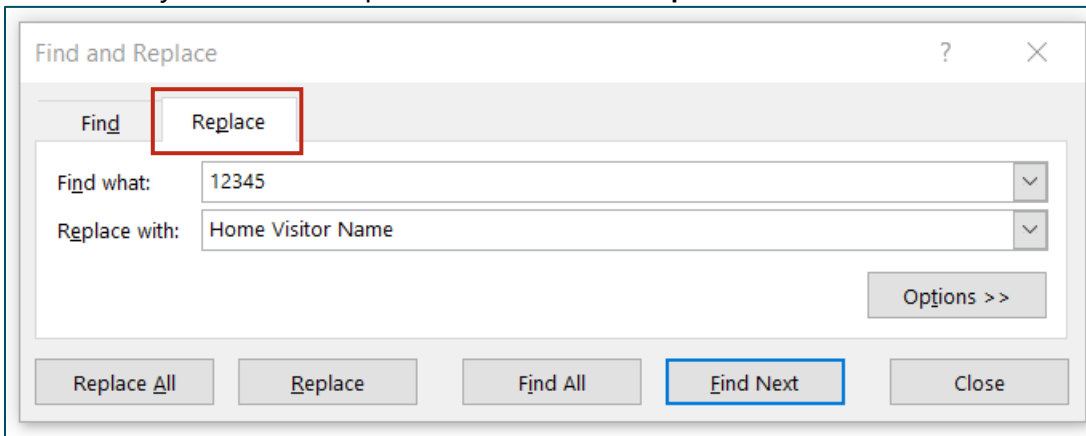
1. Select **Find & Select** in the far right corner of the home tab on the navigation ribbon.



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](mailto:homevisiting@doh.wa.gov) if you have questions about these instructions or the Measures QA reports general.