

# Spreadsheets 101: There are NO stupid questions!

PCC User Conference 2023



# While we are waiting to get started...

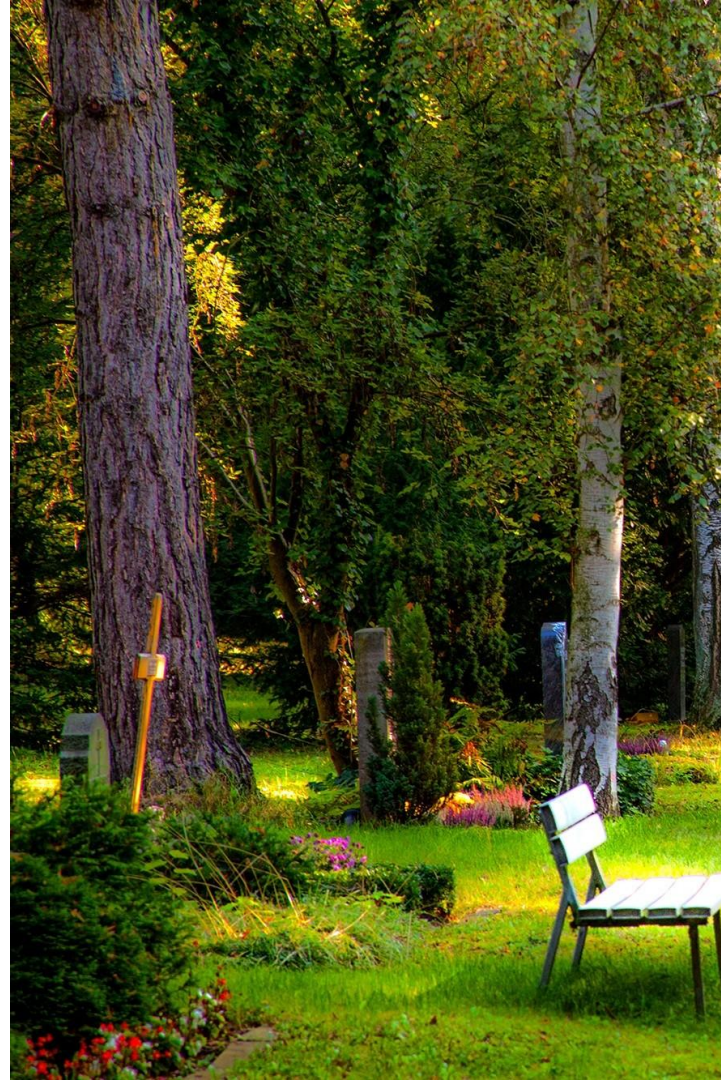
- Go to Google Drive (drive.google.com)
  - Login (if your email is already Google-enabled) or create an account (if not)
- Then go to <https://bit.ly/pcc-fun>
  - For each of 4 files, make a copy (right click, ***Make a copy***)
- Now go back to My Drive (drive.google.com). You should see:
  - Copy of Sample Patient List
  - Copy of Numbers Example
  - \* Copy of List Matching Example
  - \* Copy of Messy Data

# Spreadsheets empower you

- Spreadsheets may seem tricky at first, but:
  - COVID vaccine schedule
  - Arachidonic acid pathway
  - CPT codes
  - Developmental milestones
- No mansplaining or MBAsplaining!
- No SKBsplaining!



Alex M. WILL impose fines for violations



# Data Set #1: My Patient List

- Basic controls
- Sort
- Filter
- Color coding
- Shortcut keys
  - Ctrl-A (select all)
  - Ctrl-C (copy)
  - Ctrl-V (paste)
  - Ctrl-X (cut)
  - Ctrl-Y (repeat)
  - Ctrl-Z (undo)

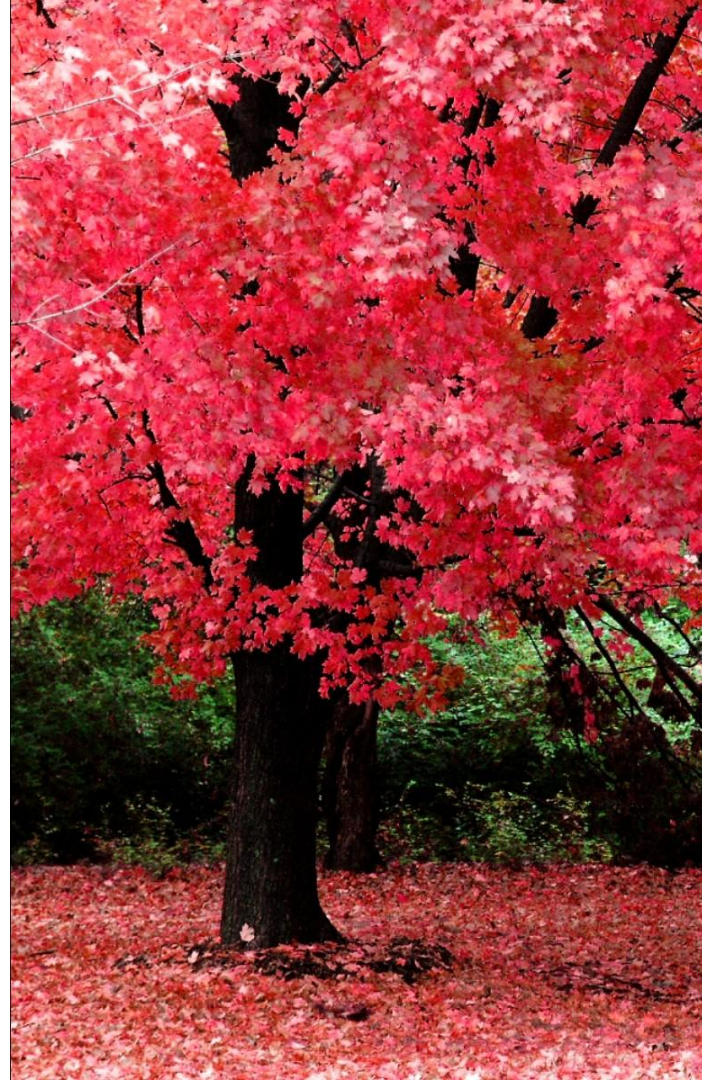
<https://bit.ly/pcc-fun>

“Sample Patient List”



# Data Set #2: Numbers

- Basic drag and cell summaries
- Formula notation
- COUNTIF <https://bit.ly/pcc-fun>  
“Numbers Example”
- SUMIF
- COUNTIFS and SUMIFS
- AVERAGEIF
- MIN, MAX, MEDIAN



# Data Set #3: Data Manipulation

- LEFT, RIGHT, MID
- LEN
- LOWER, UPPER
- CONCATENATE
- FIND

<https://bit.ly/pcc-fun>

“Messy Data”



# 7244 – is it a number, or is it text?

Number as actual value		Number as unique identifier	
Money	\$83,382.2 2	Phone number	9312104874
Age in years	8	Tax ID	02-333-2948
Patient visits	813	Insurance ID number	7072238281

Numbers align right

	2918723	2918723
	123819723	123819723
	12837197283	12837197283
	118238	118238
	1287328	1287328
	12873182	12873182
	12871823	12871823

Text aligns left

	A	
1	944256856	BR
2	855223506	JEF
3	377915508	TIM
4	821381674	MY
5	509669561	ME
6	979341556	LUI
7	868832213	JEP
8	553928893	TEI
9	582331682	ERI
10	761102903	CH
11	955696471	ILY
12	928961869	MA
13	261988805	TYI
14	856358472	KEI
15	170125498	XYI
16	796188449	EM
17	753600533	CH

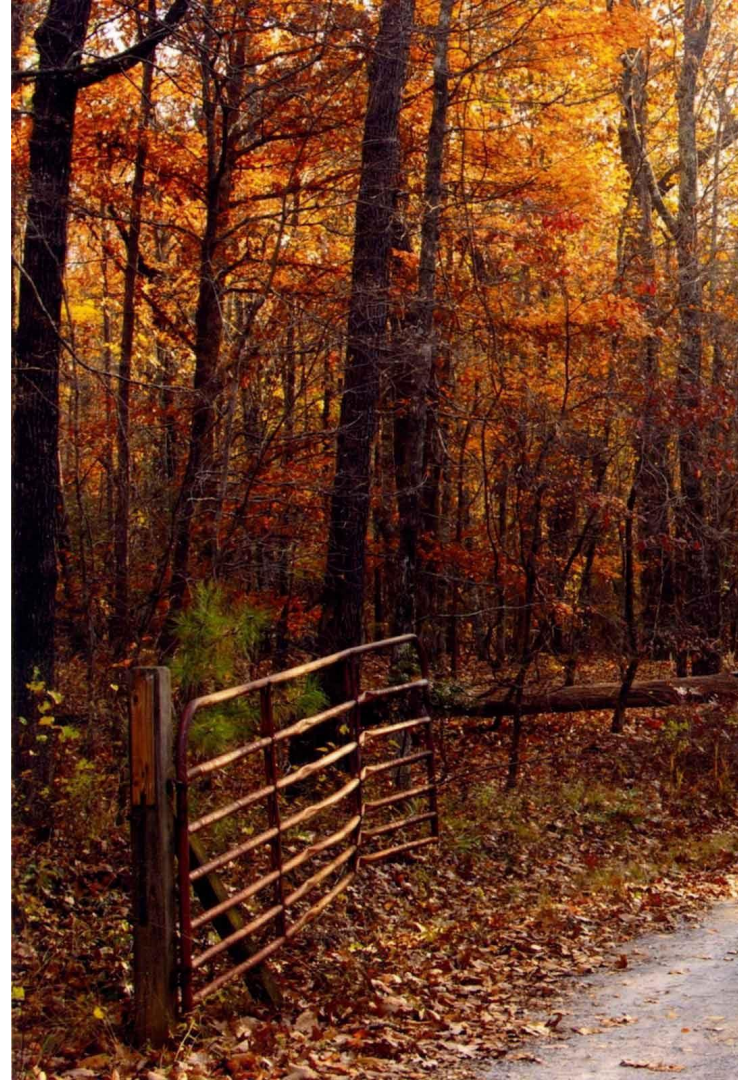
Little green triangles ask you, "This is text. Would you like to make it a number?"

# Data Set #4: Medical Home Match!

- VLOOKUP
- CONCATENATE combined with VLOOKUP

<https://bit.ly/pcc-fun>

“List Matching Example”





# VLOOKUP anatomy

=VLOOKUP(**A2**, **Their List!A:C**, **3**, **false**)

What I'm trying to find

I want to match **A2**

Where I'm looking for it AND what I want to bring back, if I find it

I am looking in sheet **Their List**, anywhere in column **A**, for a match

If I find a **match in Column A**, I want to return what's in **Column C** (which is the **3<sup>rd</sup>** column)

Always put **false**



# Data Set #5: Pivot Tables!

- Selecting source data
- Arranging your table
- Selecting meaningful functions
- Filtering data in the table
- Exporting your table

<https://bit.ly/pcc-fun>

“Numbers Example”



# Data Set #6: Duplicates vs “Duplicates”

- Remove duplicates
- Conditional formatting

<https://bit.ly/pcc-fun>  
“Numbers Example”



# Data Set #7: Advanced Numbers

- AND, OR
- IF, IFNA, IFERROR
- DAY, WEEKDAY, MONTH, YEAR

<https://bit.ly/pcc-fun>  
“Numbers Example”



# Good Free Resources on the Internet

Website	URL	Type
Excel Easy	<a href="https://www.excel-easy.com/">https://www.excel-easy.com/</a>	Topic-based
GCF	<a href="https://edu.gcfglobal.org/en/excel2016/">https://edu.gcfglobal.org/en/excel2016/</a>	Topic-based
Mr Excel	<a href="https://www.mrexcel.com/">https://www.mrexcel.com/</a>	Problem-based
ExcelFunctions	<a href="https://www.excelfunctions.net/excel-math-functions.html">https://www.excelfunctions.net/excel-math-functions.html</a>	Topic-based
Learn VBA Programming	<a href="https://www.tutorialspoint.com/vba/">https://www.tutorialspoint.com/vba/</a>	Topic-based

Online classes (for a fee): **Udemy.com**  
(Many offer free teasers on YouTube)