Excel for Physicians: Half-day workshop

Lesson 1: Data cleaning

Lesson 2: Analyzing clinical data

Lesson 3: Analyzing operational and financial data

Lesson 4: Visualizing performance

Learning Objectives

- Student can manipulate data extracts
- Student can prepare, inspect and analyze clinical data
- Student can perform basic financial data analysis
- Student can build dynamic visualizations

Lesson 1: Data cleaning
Objective: Student can clean and manipulate data extracts
Description:
- Parsing cost centers
- Merging clinical and payroll data
- Working with string and date functions
- Consolidating data sources
- Importing and cleaning external data extracts

Functions/tools used:
- Identifying and removing duplicates
- Custom cell formatting
- String and date functions
- LEFT(), RIGHT(), MID(), text-to-columns
- VLOOKUP()
- Power Query

Time: 50 minutes

Lesson 2: Analyzing clinical data
Objective: Student can prepare, inspect and analyze clinical data
Description:
- Evaluating patient safety data
- Ranking patient satisfaction scores
- Comparing healthcare cost and utilization
- Investigating prescription history

Functions/tools used:
- Sorting and filtering
- Math functions
- PivotTables

Time: 50 minutes

Lesson 3: Analyzing operational and financial data
Objective: Student can perform basic financial data analysis
Description:
- Summarizing data by cost centers and units
- Creating calculated fields
- Heatmaps for variance analysis
- Conditional formatting for variance analysis
- Finding top and bottom values per category

Functions/tools used:
- PivotTables
- Conditional formatting

Time: 50 minutes

Lesson 4: Visualizing performance
Objective: Student can build dynamic visualizations
Description:
- Monitoring trends at-a-glance
- Monitoring performance across units
- Building dynamic date-based visualizations
- Forecasting trends

Functions/tools used:
- Sparklines
- Slicers
- Named ranges
- Chart forecasting

Time: 50 minutes