



EXCEL FOR HEALTHCARE ADMINISTRATORS: HALF-DAY WORKSHOP

Lesson 1: Calendars, scheduling and dates

Lesson 2: Data cleaning

Lesson 3: Analyzing operational and financial data

Lesson 4: Visualizing performance data

Learning Objectives

- Student can manipulate date functions to build dynamic calendars and reports
- Student can manipulate and clean string data
- Student can perform basic financial data analysis
- Student can build dynamic visualizations

Lesson plan developed by George Mount. For more resources like this, visit stringfestanalytics.com

Lesson 1: Calendars, scheduling and dates

Objective: Student can manipulate date functions to build dynamic calendars and reports

Description:

- Building an on-call shift calendar
- Data validation for employee names
- Calculate FTEs
- Calculating shift hours
- Calculating staff tenure

Functions/tools used:

- Conditional aggregation
- Date functions
- Data validation
- Named ranges

Time: 50 minutes

Lesson 2: Data cleaning

Objective: Student can manipulate and clean string data

Description:

- Formatting employee IDs
- Parsing cost centers
- Merging clinical and payroll data
- Unpivoting a data extract

Functions/tools used:

- Custom cell formatting
- LEFT(), RIGHT(), MID(), text-to-columns
- VLOOKUP()
- Power Query

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 the top 10 values per department

Functions/tools used:

- PivotTables
- Conditional formatting

Time: 50 minutes

Lesson 4: Visualizing performance data

Objective: Student can build dynamic visualizations

Description:

- Monitoring trends at-a-glance
- Monitoring performance across departments
- Building dynamic date-based visualizations
- Forecasting trends

Functions/tools used:

- Sparklines
- Slicers
- Named ranges
- Chart forecasting

Time: 50 minutes



Lesson plan developed by George Mount, For more resources like this, visit stringfestanalytics.com