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Learning Objectives

Learn how to use the most common formulas in Excel

Create your own ASC Excel tool to analyze case cost data

Gain more confidence working with Excel

A flowchart with three teal boxes connected by white arrows. The first box is 'Learn how to use the most common formulas in Excel', the second is 'Create your own ASC Excel tool to analyze case cost data', and the third is 'Gain more confidence working with Excel'. The arrows show a sequential flow from left to right.

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What I will show you today:

ASC-20 COVID Vaccination
CDC Tracking Spreadsheet

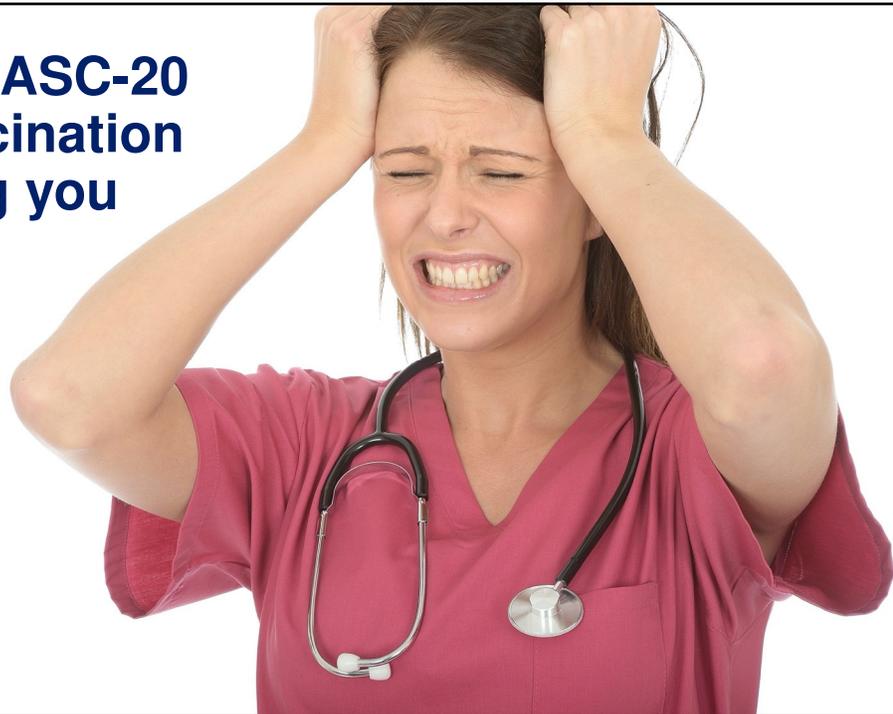


Case data from HST
(or any PM system)



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Is Tracking ASC-20 COVID vaccination data driving you crazy?



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ASC-20 Data Tracking Spreadsheet

Did you know the CDC has been releasing new versions?

Instructions (Version 5, January 2022)

Purpose of this Tracking Worksheet:

Please use this worksheet to help log and track the number of healthcare personnel (HCP) who are vaccinated for COVID-19. When you enter COVID vaccination data for each HCP in the Tracking Worksheet, and select a reporting week, the data to be entered into NHSN will automatically be calculated on the Reporting Summary.

Summary Instructions:

Any HCP recently hired or working at your facility should be added to the Tracking Worksheet. When HCPs are vaccinated, enter the vaccination information onto the Tracking Worksheet. When HCPs are no longer an employee at your facility, the End of Employment Date should also be indicated on the Tracking Worksheet. NOTE: Termed employees (HCPs) or contractors who no longer work in the facility do not need to be deleted off the Tracking Worksheet but should be indicated on the worksheet by entering the End of Employment Date. When a reporting week is selected, only those who were current HCPs during the reporting period will be included in the Reporting Summary. Only vaccinations, contraindications, and other conditions, including adverse events should be reported for the reporting week hence, this information will be displayed in the Reporting Summary.

Instructions (Version 8, July 2022)

Purpose of this Tracking Worksheet:

Please use this worksheet to help log and track the number of healthcare personnel (HCP) who are vaccinated for COVID-19. When you enter COVID vaccination data for each HCP in the Tracking Worksheet, and select a reporting week, the data to be entered into NHSN will automatically be calculated on the Reporting Summary.

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ASC-20 Data Tracking Common Issues

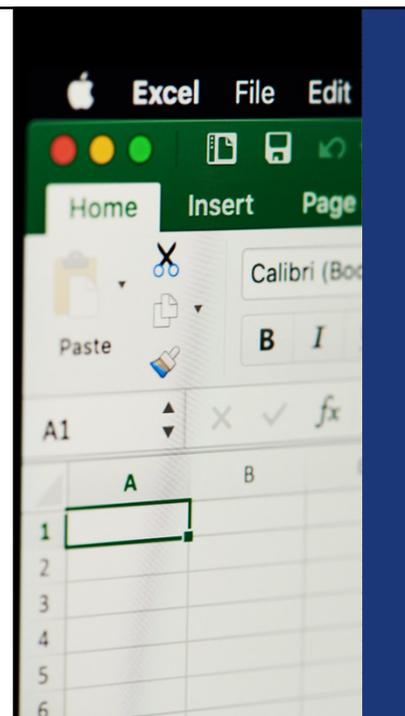
- Cell Protection error message: try a smaller range to delete and one column at a time.
- YES/NO answers do not copy over.

TIPS FOR NEW VERSIONS

- Watch for number of columns, track new features.
- Copy over old version and paste into new version.



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Working with Case Costing Data

- Best approach to analyze profitability by MD.
- Tips and Tricks for data exports.
- Filtering and sorting data in excel
- Creating Pivot tables and Report



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Data Reporting Formats

Report ID: PC7001 - Profit and Cost by Physician
 Printing Selection: From Date of Service=6/12/2022 To: Date of Service=6/30/2022 Suppress Procedure-No
 Run Date: 9/18/2022 6:26 PM
 Page: 1 of 3
 Sort By: Procedure Net Profit

Primary Physician	Case Count	Gross Billing	Expected Revenue	Actual Payment Rec'd	Direct Cost	Indirect Cost	Total Cost	Net Profit	Profit Margin %	Expected Revenue	Actual Payment
Aug-22	71	\$299,121	\$78,131	\$71,086	\$12,727	\$0	\$12,727	\$58,359	63%	62%	
Cataract	66	\$195,156	\$67,181	\$68,558	\$25,620	\$0	\$25,620	\$42,938	64%	63%	
Cataract + ORA	3	\$8,724	\$2,907	\$2,882	\$1,617	\$0	\$1,617	\$1,265	44%	44%	
Injection treatment of ey	1	\$21,119	\$1,013	\$1,013	\$231	\$0	\$231	\$882	67%	67%	
Tarsorrhaphy	1	\$2,389	\$789	\$790	\$174	\$0	\$174	\$616	80%	78%	
Subtotals:	71	\$298,388	\$71,870	\$73,243	\$27,742	\$0	\$27,742	\$48,591	63%	62%	
Aug-22	89	\$275,734	\$104,224	\$106,566	\$64,613	\$0	\$64,613	\$41,953	46%	39%	
Cataract	40	\$117,960	\$40,615	\$41,020	\$18,099	\$0	\$18,099	\$22,921	56%	56%	
Cataract + FEMTO	21	\$64,248	\$21,161	\$21,922	\$15,329	\$0	\$15,329	\$6,593	31%	30%	
YAG Capsulotomy	17	\$12,121	\$4,314	\$4,538	\$365	\$0	\$365	\$4,173	97%	92%	
Descemet Membrane	1	\$10,396	\$6,899	\$6,830	\$5,285	\$0	\$5,285	\$1,545	22%	23%	
Complex Cataract	1	\$2,908	\$1,115	\$1,837	\$420	\$0	\$420	\$1,417	127%	77%	
Cataract + FEMTO + ORA	9	\$39,802	\$13,357	\$13,462	\$12,104	\$0	\$12,104	\$1,358	15%	10%	
Iris Reposition	1	\$5,247	\$1,749	\$1,731	\$483	\$0	\$483	\$1,248	71%	72%	
Pinning Keratoplasty	1	\$8,647	\$5,149	\$5,173	\$4,200	\$0	\$4,200	\$978	19%	19%	
Clear Lens Extraction + O	1	\$3,942	\$2,148	\$2,148	\$1,387	\$0	\$1,387	\$761	35%	35%	
IOL Exchange + ORA	1	\$3,942	\$2,148	\$2,148	\$1,380	\$0	\$1,380	\$768	35%	35%	
Laser Peripheral Iridotomy	1	\$25	\$175	\$173	\$20	\$0	\$20	\$153	87%	88%	
Pterygium Excision	1	\$2,338	\$796	\$790	\$738	\$0	\$738	\$52	7%	7%	
Cataract + ORA	4	\$12,558	\$4,598	\$4,774	\$4,793	\$0	\$4,793	\$19	0%	0%	
Subtotals:	89	\$275,734	\$104,224	\$106,566	\$64,613	\$0	\$64,613	\$31,913	33%	33%	
Cataract	21	\$64,248	\$21,762	\$23,077	\$8,839	\$0	\$8,839	\$14,238	65%	62%	
Descemet Membrane	5	\$51,330	\$33,845	\$33,547	\$26,377	\$0	\$26,377	\$7,170	21%	21%	



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	A	B	C	D	E	F	G	H	I	J	K	L	M
2													
4	Report ID: ST8000 - Physician Case Count Trending Analysis												
7	Printing Selection: Beginning Month=8 Beginning Year=2022 SF												
8	Sort By: Physician Name												
10	Group By: Physician Specialty 1												
12													
16													
19													
21													
22	MD1		0	0.00	3	1.55	0						
23	MD2		0	0.00	6	3.11	0						
24	MD3		26	9.35	37	19.17	0						
25	MD4		28	10.07	10	5.18	0						
26	Subtotals:		54	19.42	56	29.02	0						
27	Ophthalmology												
28	MD5		49	17.63	25	12.95	0						
29	MD6		5	1.80	0	0.00	0						
30	MD7		0	0.00	8	4.15	0						
31	MD8		1	0.36	7	3.63	0						
32	MD9		51	18.35	36	18.65	0						
33	MD10		70	25.18	39	20.21	0						
34	Subtotals:		176	63.31	115	59.59	0						
35	Plastics												
36	MD11		48	17.27	22	11.40	0						
37	Subtotals:		48	17.27	22	11.40	0						
38	Grand Totals:		278	100.00	193	96.50	0						
40													
44													

Working with HST

Data Export

- DE5500 - Visit Billing Data
- DE5501 - Scheduled Appointments Data
- DE5502 - Clinical Data
- DE5503 - Physical Count Variance
- DE5504 - Contract Carve Outs
- DE5505 - Patient Collection Data
- DE5506 - Deposit Detail
- DE5507 - CPT Codes
- DE5508 - Billed Service Data
- DE5509 - OR Turnover Data
- DE5510 - AJRR Submission Data



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Export to CSV

Report

DE5500 - Visit Billing Data

From Admit Date: 1/1/2022

To Admit Date: 6/30/2022

Primary Financial Class: SELF PAY

Physician

Visit Category: All

Report Format: PDF, Excel, CSV (selected)



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Formulas, Tips, & Tricks

- Export to .csv when possible
- Drag down to replicate
- Pivot Tables
 - ✓ Use clean data
 - ✓ Select all columns
 - ✓ First, **make sure the Power Pivot is enabled in your Excel.**
 - ✓ File > Options > Add-ins > in the Manage box, click COM Add-ins > Go.
 - ✓ Check the Microsoft Office Power Pivot box > OK.
 - ✓ If the Power Pivot is not in the list, you could select Disabled Add-ins in Manage box, and enable it.

Useful Keyboard Commands

FIND	Control F
COPY	Control C
PASTE	Control V
Top of Data	Control Home



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Need more personal coaching?



ASC FINANCIAL CONSULTING FOR NURSE LEADERS

90 Minutes with ASC Financial Expert, Nancy Stephens

- 30 | Pre-work review
- 30 | Assessment
- 30 | Strategize Solutions

\$390

KEY AREAS OF ASSESSMENT/DISCUSSION

- Creating or enhancing a financial dashboard
- Tracking on monitoring KPI data
- KPI Healthy ranges based on ASC case mix
- Spotting financial statement trends and areas of concern
- Enhancing Excel skills for KPI tracking and presentation purposes

DATA/DOCUMENTATION REQUIRED FOR SESSION

- ✓ 1 to 3 years of income statements
- ✓ Payroll Reports that include payroll hours by reporting month
- ✓ Historical case mix by specialty
- ✓ Supporting data as needed if other financial issues are uncovered

<https://cl990.infusionsoft.com/app/orderforms/90withnancy>

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Let's do this again.



What do you want to learn?



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Thank You

Questions?

Contact Nancy Stephens
nstephens@pss4asc.com



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Available to Members on eSupport

eSupport > Business Ops

- Excel for Nurses Webinar – KPI and Staffing Model

eSupport > Business Ops > Key Indicator Tracking and Reporting

- KPI Dashboard
- OR Utilization Tool
- Board Package Tool
- Revenue Cycle Management ASC Scorecard



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Upcoming Webinars

DATE		CE	WEBINAR TOPIC	SPEAKER
OCT 28	60	RN, CASC	Revenue Cycle Management: Improving the Bottom Line	Kylie Kaczor
NOV 28	20		Annual Survey Watch Report 2022	Cyndi Krause
DEC 16	60	RN, CASC	Life Safety Risk Assessment: What is it and what is Required?	John Crowder, Jr.



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