

Saving Contact Report as Excel

Required for completing **BFPC Quarterly Report**.

Optional for others.

Kansas WIC Program
BFPC Contact Report
Barton County WIC Clinic
BFPC Contacts for 10/01/2018 - 12/31/2018

Agency: Barton County WIC Agency
Clinic: Barton County WIC Clinic

Staff:

Client Id	Client Name	Category	Contact Date	Contact Method	Contact Successful?	Fully BF?	Type of Contact	Date Added to BFPC Program	Date Removed From BFPC Program	Data Entry Date
10527889	Polly, Brooke K	PG	10/24/2018	Group/Class	Yes		Followup			10/24/2018
10527429	Haney, Jesse L	BF	10/23/2018	Phone Attempt	No	Yes	Followup			10/23/2018
10527727	Garza Enriquez, Monica V	BF	10/23/2018	Phone Attempt	No		Followup			10/23/2018
10527546	Garcia, Araly	BF	10/23/2018	Phone Attempt	No		Followup			10/23/2018
11702641	Mattheyer, Alexis R	BF	10/23/2018	Phone Attempt	No		Followup			10/23/2018
10524299	Ramirez, Angelica	BF	10/23/2018	Phone Attempt	No		Followup	10/16/2018		10/23/2018
10523934	Alvarado, Eva	BF	10/17/2018	Phone Call	Yes	No	Initial	04/15/2014		10/17/2018
100710014	Miller, Kelsi	BF	10/17/2018	Phone Call	Yes	Yes	Followup	10/17/2018		10/17/2018
10528057	Tadlock, Kristy L	PG	10/16/2018	Clinic Visit	Yes		Initial	10/16/2018		10/16/2018

Print | **Save As** | Close

Save As

Click the **[Save As]** button. Your computer will ask you where you want to save the Excel Data Spreadsheet. You may wish to set up a special folder and save all the contact reports together.

Once the data is saved as a spreadsheet it can be manipulated like any Excel spreadsheet. For example, data can be sorted and filtered which makes it easy for you to complete your quarterly BFPC report.

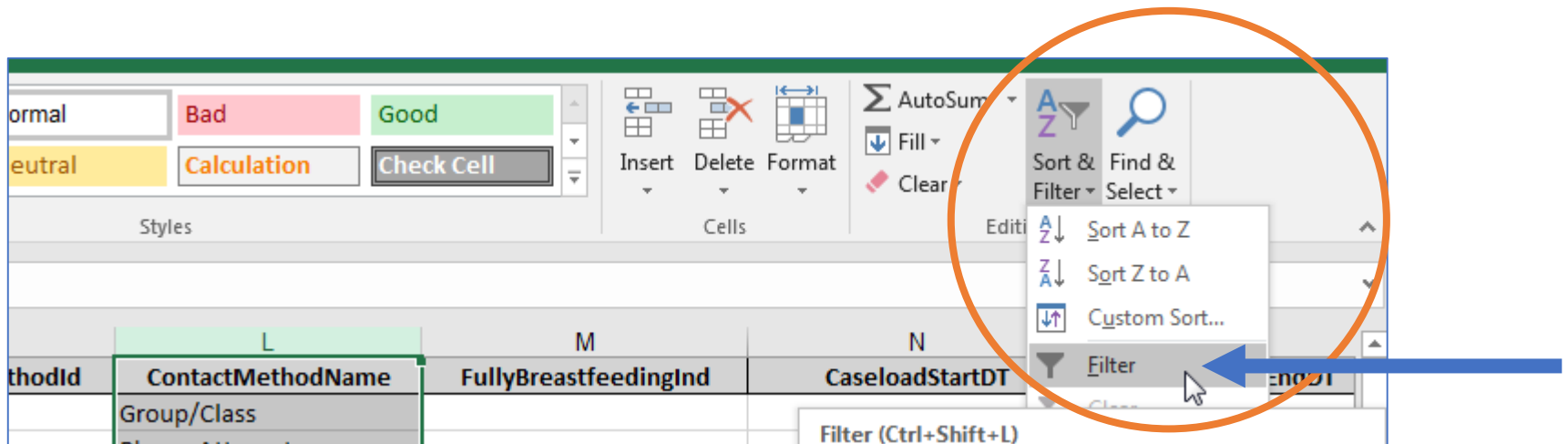
File name:	BFPC Contact Report
Save as type:	Excel Data Spreadsheet (*.xls;*.xlsx)

HINT: You might want to save your spreadsheet twice – save one with the word “play” or “filter” in it in case you make a mistake. And don’t forget to use your **“Undo”** button!



How to Filter

To filter, highlight the column(s) to be sorted and click on **[Sort and Filter]** and then select **[Filter.]**

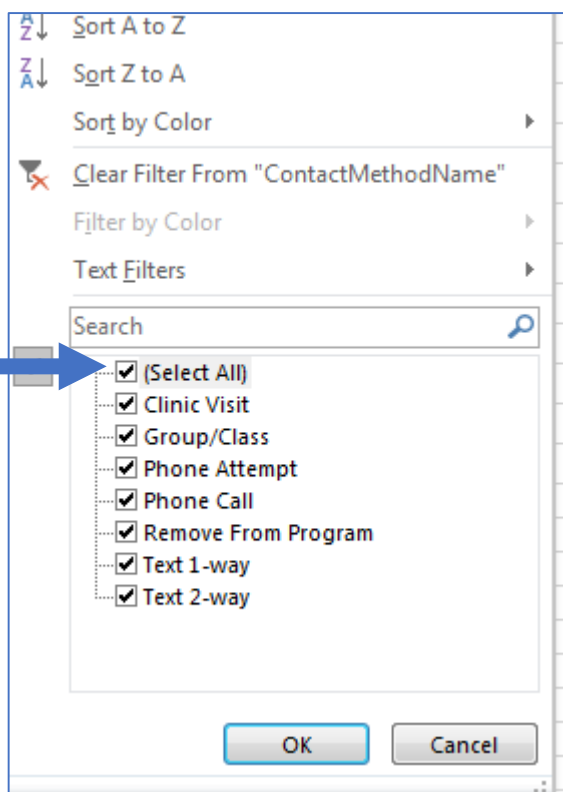


L
ContactMethodName
Group/Class
Phone Attempt
Phone Attempt
Phone Attempt
Phone Attempt
Phone Attempt
Phone Call

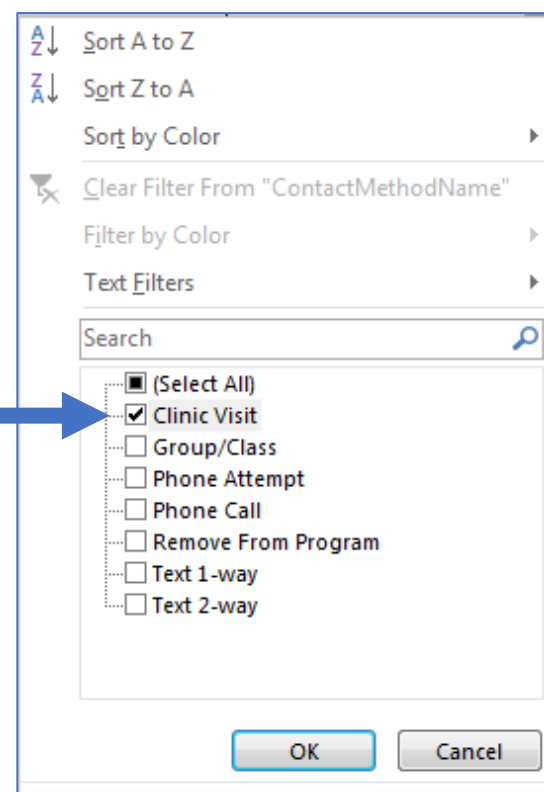
Now you will see an arrow at the top of the column.

To filter for “Clinic Visits”

1. Click **[Select All]** which clears all the check boxes.

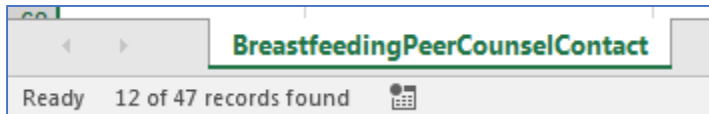


2. Check just the **[Clinic Visit]** box.



3. Press **[OK]** and only the clinic visit contacts will appear.

Look at the bottom left-hand corner of the spreadsheet to see the number of records that match your filtered data. The number of rows tells you how many clinic visit contacts were made in the last quarter.

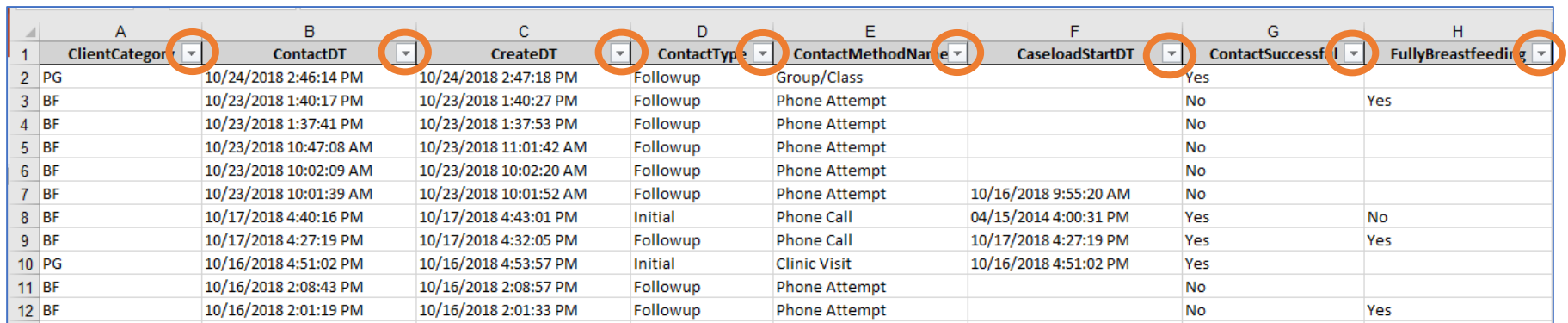


BUT you might want to filter some more!

More than one column can be filtered at the same time. For quarterly reports most often you need to know the **Client's Category**, **Contact Type**, and **Contact Method**.

To filter all

Click on **[Sort & Filter]** and then click on **[Filter]** in the drop down box. There are now arrows next to the name of the column for every column.

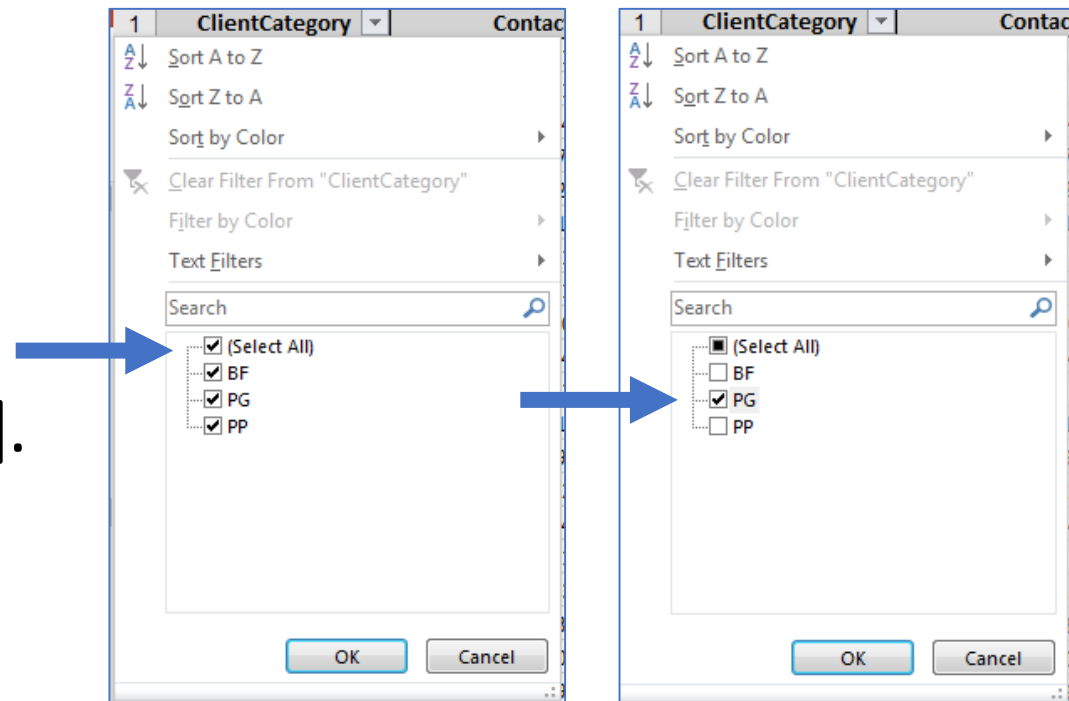
A screenshot of a spreadsheet with 12 rows and 8 columns. The columns are labeled A through H. Each column header has a small downward-pointing arrow next to it, indicating that filtering is enabled for all columns. The data in the spreadsheet is as follows:

	A	B	C	D	E	F	G	H
1	ClientCategory	ContactDT	CreateDT	ContactType	ContactMethodName	CaseloadStartDT	ContactSuccessful	FullyBreastfeeding
2	PG	10/24/2018 2:46:14 PM	10/24/2018 2:47:18 PM	Followup	Group/Class		Yes	
3	BF	10/23/2018 1:40:17 PM	10/23/2018 1:40:27 PM	Followup	Phone Attempt		No	Yes
4	BF	10/23/2018 1:37:41 PM	10/23/2018 1:37:53 PM	Followup	Phone Attempt		No	
5	BF	10/23/2018 10:47:08 AM	10/23/2018 11:01:42 AM	Followup	Phone Attempt		No	
6	BF	10/23/2018 10:02:09 AM	10/23/2018 10:02:20 AM	Followup	Phone Attempt		No	
7	BF	10/23/2018 10:01:39 AM	10/23/2018 10:01:52 AM	Followup	Phone Attempt	10/16/2018 9:55:20 AM	No	
8	BF	10/17/2018 4:40:16 PM	10/17/2018 4:43:01 PM	Initial	Phone Call	04/15/2014 4:00:31 PM	Yes	No
9	BF	10/17/2018 4:27:19 PM	10/17/2018 4:32:05 PM	Followup	Phone Call	10/17/2018 4:27:19 PM	Yes	Yes
10	PG	10/16/2018 4:51:02 PM	10/16/2018 4:53:57 PM	Initial	Clinic Visit	10/16/2018 4:51:02 PM	Yes	
11	BF	10/16/2018 2:08:43 PM	10/16/2018 2:08:57 PM	Followup	Phone Attempt		No	
12	BF	10/16/2018 2:01:19 PM	10/16/2018 2:01:33 PM	Followup	Phone Attempt		No	Yes

To turn filter off: Click **[Sort and Filter]** again and then **[Filter.]** All your filtering will disappear and the spreadsheet returns.

Click on the down arrow for the first column you want filtered, e.g. **[ClientCategory]**.

Click **[Select All]** then click which client category you wish to filter for first, e.g. **[PG]**. Click **[OK]**. Now just the pregnant women will appear.



Continue filtering until you have just the info you need

AutoSave Off | BFCP Contact Report -

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

G56

	A	B	C	D	E
1	ClientCategory	ContactDT	CreatedDT	ContactType	ContactMethodName
10	PG	10/16/2018 4:51:02 PM	10/16/2018 4:53:57 PM	Initial	Clinic Visit
29	PG	10/09/2018 3:03:27 PM	10/09/2018 3:37:15 PM	Initial	Clinic Visit
32	PG	10/09/2018 2:05:07 PM	10/09/2018 2:12:44 PM	Initial	Clinic Visit
33	PG	10/09/2018 1:57:13 PM	10/09/2018 1:59:50 PM	Initial	Clinic Visit
40	PG	10/02/2018 3:36:18 PM	10/02/2018 3:37:56 PM	Initial	Clinic Visit
41	PG	10/02/2018 2:39:31 PM	10/02/2018 2:41:49 PM	Initial	Clinic Visit
43	PG	10/02/2018 1:46:57 PM	10/02/2018 1:48:16 PM	Initial	Clinic Visit

Client
Category
filter:
PG

Contact
Type
filter:
Initial

Contact
Method
filter:
Clinic Visit

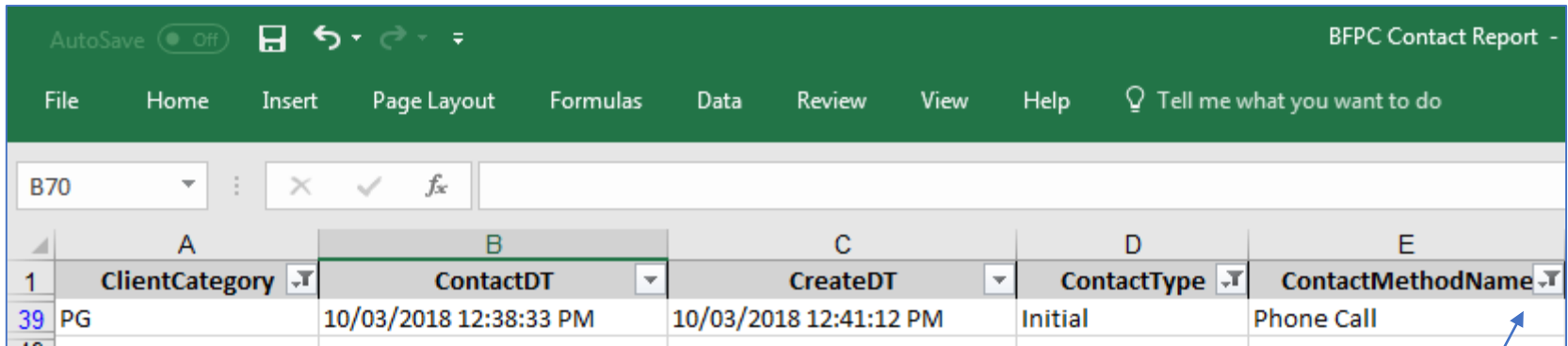
Enter into BFPC Quarterly Report

BFPC Quarterly Report													
Agency/Clinic:				# BFPC clients contacted:				Quarter					
Date:				PG & BF WIC Caseload:				1 st	2 nd	3 rd	4 th		
BFPC Name:				Avg weekly hours:				Oct-Dec	Jan-March	April-June	July-Sept		
BFPC Supervisor:				Clients/hour:	#####			Due Jan 20	Due Apr 20	Due July 20	Due Oct 20		
# Groups/Classes prepared for:				Contacts/hour:	#####								
** 2nd quarter must include BFPC eval													
Contact Type													
Category	Clinic Visit	Email	Social Media	Group/Class	Home Visit	Hospital Visit	Mail	Other	Phone Attempt	Phone Call	Text 1-way	Text 2-way	Total
Initial Pregnant	7												7
Follow up Preg													0
Initial BF/PP													0
Follow up BF/PP													0
Total Contacts	7	0	0	0	0	0	0	0	0	0	0	0	7

This info can be used for the BFPC Quarterly Report:

Seven pregnant women were seen for **initial contact** at **clinic visit**.

Number of PG women who received a phone call for their initial visit?



The screenshot shows the Excel interface for a report titled "BFPC Contact Report". The ribbon includes "File", "Home", "Insert", "Page Layout", "Formulas", "Data", "Review", "View", and "Help". The active cell is B70. The table below has the following data:

	A	B	C	D	E
1	ClientCategory	ContactDT	CreateDT	ContactType	ContactMethodName
39	PG	10/03/2018 12:38:33 PM	10/03/2018 12:41:12 PM	Initial	Phone Call

Now you can enter one telephone contact for newly pregnant women on the BFPC Quarterly Report.

Contact Method filter:
Phone Call

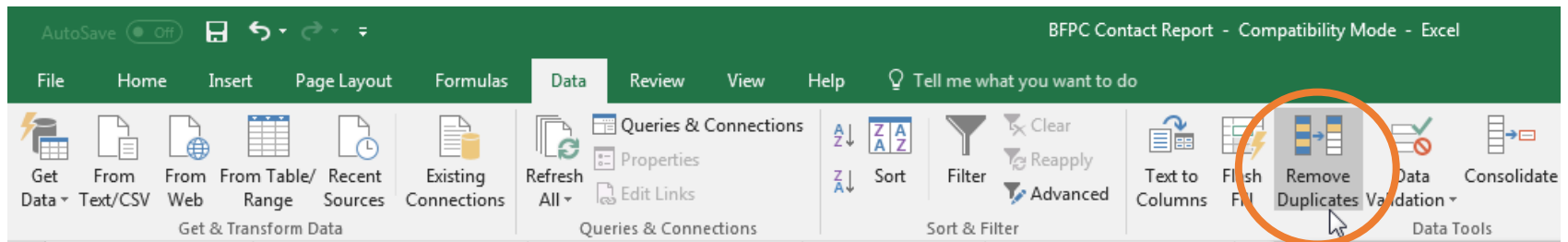
How many individual clients were contacted? (#BFPC Clients Contacted)

The report prints a record for every contact you make, so if you see a client 6 times in one quarter, that client will show on the contact report 6 times.

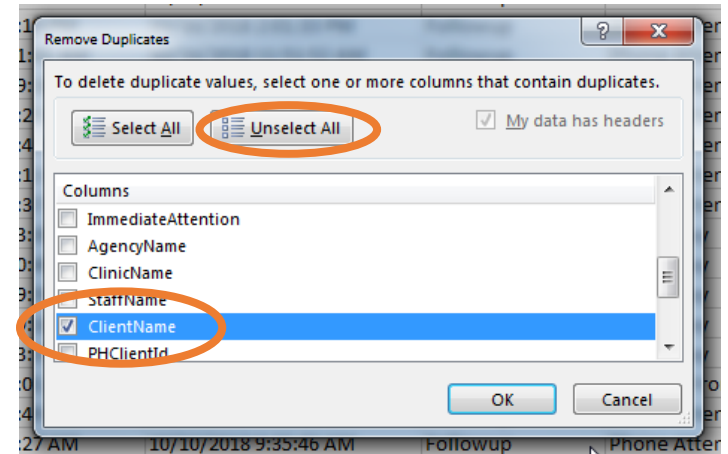
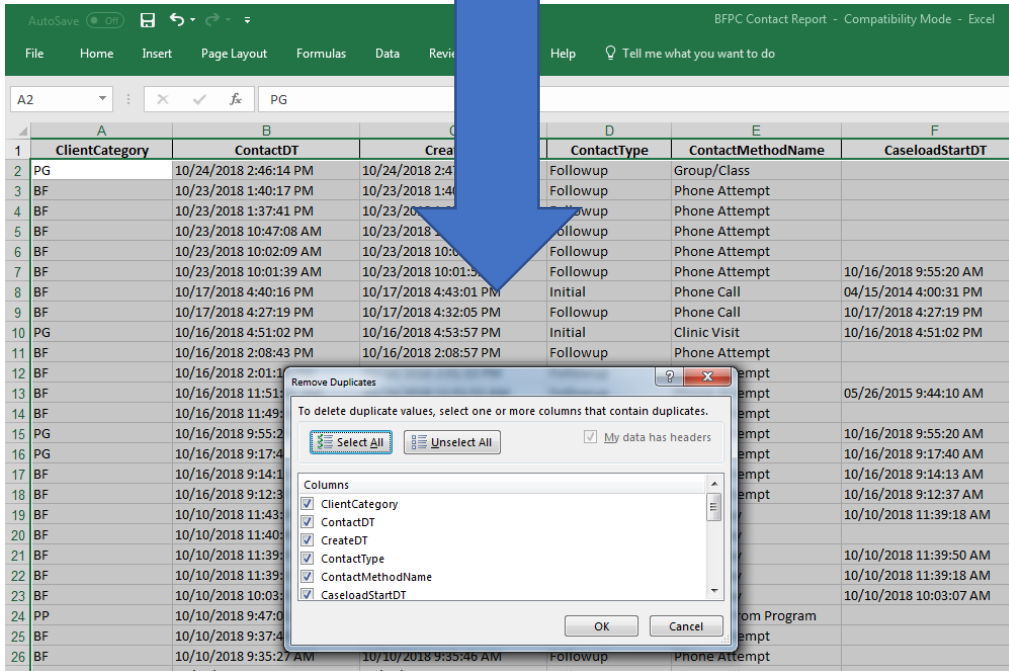
Here's how to **remove duplicate records** to obtain an unduplicated count of clients.



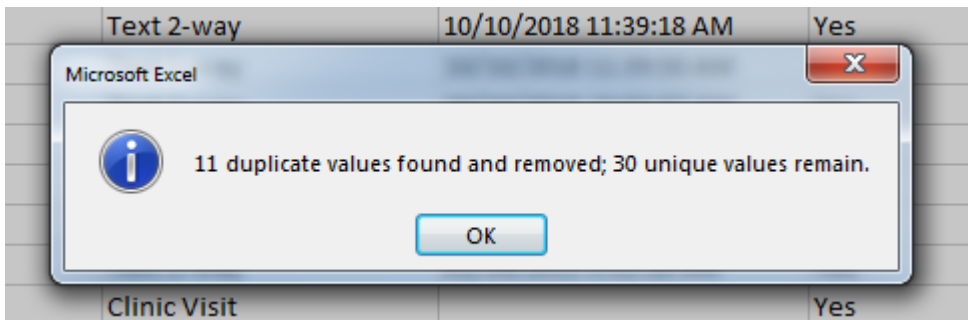
Select all the rows. Click the Data tab at the top and in the Data Tools group select Remove Duplicates.



After you click **[Remove Duplicates]**, the box below will pop up.



Click **[Unselect All]** and then check the box **[Client ID]**.



The last screen will let you know how many duplicates were removed and how many unique values remain. In this example, 30 individual women were contacted a total of 41 times.

How do I know the PG & BF WIC Caseload for the Quarterly Report?

This information isn't found on the client contact report. You'll need to run the **Caseload Management Report** and add together the number of:

Total Enrolled PG

+

Fully

+

Partial BF

PG & BF WIC Caseload





Can you answer these True or False questions about BFPC reports correctly?

Quizlet

1. When running the BFPC Contact Report for a specific quarter, would you check the “Currently Participating” check box?

True False

2. You can filter more than one column in Excel.

True False

Answers!

1. When running the BFPC Contact Report for a specific quarter, would you check the “Currently Participating” check box?

False

Correct! You would **not** want to check **Currently Participating** because you want all clients during that period and some may have been removed from the program.

2. You can filter more than one column in Excel.

True

Correct! You sure can! And it makes completing the BFPC Quarterly Report much easier.