

## Health Equity Inventory User Instructions

### Data Entry

#### Initiatives Worksheet/Tab

##### **How to Enter Data on the Initiatives Table**

For each of your institution's community-relevant / health equity-focused initiatives enter the requisite data (1 row per initiative). **Note:** the word "initiative" is used broadly to indicate a variety of activities including research, courses, community health programs, etc.

- 1) Navigate to the last row of the data table in the Initiative Name column.
- 2) Start typing new data on the next blank cell and the data table will adjust.
- 3) Use the TAB key (or your cursor) to navigate throughout the table.
- 4) Please note that some cells are restricted to only accept valid data. A dialog will appear if invalid data is entered. Try to use the built-in preset options as much as possible to help with analyzing the data.
- 5) **Helpful hint** – If you hover your cursor over the column headings, comments will appear to explain how to properly record the data. Those comments also appear below:

Initiative name: Type in the name of the initiative.

Initiative domain: From the drop down menu, select the *primary* domain in which the initiative is housed.

Type of initiative: From the drop down menu, select the initiative type.

Outcome of interest: From the drop down menu, select the *main* health outcome or condition the initiative targets.

**Note:** If an initiative has more than 1 main outcome of interest, users have 2 options:

- 1) Select one of the outcomes as primary and enter only that information
- 2) Copy and paste the entire row, keeping all data the same but changing the 'Outcome of Interest'. **Caution:** If this method is used the initiative will be double counted for some analyses. Results will have to be adjusted to account for this.

Project goals: Type in the specific goals / aims of the initiative. For example; "A 10% decrease in uncontrolled diabetes by 2020" or "Increased understanding among medical students about how housing impacts health".

Evidence of impacts: Type in information about current efforts to evaluate the initiative and what the results have been so far. For example; "In 2014, pre / post knowledge tests showed a 20% increase in resident trainees' ability to detect health care disparities via QI data analysis" or "Not yet evaluated".

Internal project lead: Type in the name of the internal team member primarily responsible for the initiative. **Note:** Data sorting will be easier if you enter last names first: "Last, Middle Initial, First" or "Last, First".

School or Hospital: From the drop down, indicate whether a medical school or teaching hospital is the primary site for the initiative itself or the initiative's coordination.

Department: Type in the *primary* department for the internal project lead.

Contact email: Type in the internal lead's email address.

## Partners Worksheet/Tab

### How to Enter Data on the Partners Table

**Note**: An initiative might have multiple internal and external partners (in addition to the primary internal department you entered on the 'Initiatives' tab). Please use 1 row per partner. For example, if your "Nutrition initiative" has 6 partners, 6 rows would be dedicated to that initiative on this tab.

The general process is the same as that for data entry on the "Initiatives" Table. A description of the data to be entered is presented below:

Select initiative: From the drop down, select the initiative from the list of 'Initiative Names' you entered on the previous tab.

Internal/External: From the drop down, select whether the partner is internal (for example, a department, center or office in the same hospital or medical school you indicated on the 'Initiatives' tab) or external (for example, another health professions school in your University, a local community-based organization, a local elementary school).

External Organization or Internal Department: Type in the name of the organization or department. **Note**: It is important that each user use the same name, entered in the same way, to indicate an organization.

Name of primary contact: Using the same name format you used for the 'internal lead' column on the 'Initiatives' tab, enter in the primary contact from the partner organization/department.

## Data Analysis

### Filters Worksheet/Tab

#### How to Filter the Data Tables

Simple analyses of the data in the 'Initiatives' and 'Partners' tabs can be conducted using the 'Filters' tab.

**Note:** In "Filter" analyses, the data tables ("Initiatives" and "Partners") are NOT linked. That is, you can run queries about data in the "Initiatives" table (e.g. "Show me everything we're doing about Diabetes") *or* about data in the "Partners" table (e.g. "Show me all the projects Organization X is a partner on") but you *cannot* run queries that require data from both tables to answer (e.g. "Show me all the external partners we have across all of our asthma-focused research"). For complex queries that require data in both the "Initiatives" and "Partners" tabs to answer, please use the "Report" tab analysis.

- 1) To filter data from the "Initiative" table, make your selections in the blue "Initiatives Data Table Filtering" screen. For analyses of the "Partners" table, scroll down to the green "Partners Data Table Filtering" screen.
- 2) Select the data you'd like to see. For example, if you're interested in community-based work addressing food access, click on the "Food Access" button in the "Filter by Outcome of Interest" box.
  - a. If you return to the "Initiatives" tab at this point, only "Food Access"-related activities will appear. All other data will be hidden (not deleted!). **You've now answered the query "Show me everything we're doing about food access."**
- 3) Once you make your selection:
  - a. The other buttons in the "Filter by Outcome of Interest" box turn white, indicating those other outcomes have been filtered out of the current analysis.
  - b. Some buttons in the other Filter boxes "grey out", indicating those categories are currently not represented in your "Food Access" work. For example, if after clicking on the Food Access button, the "Clinical Care" button in the "Filter by Initiative Domain" box turns a pale grey-blue, it means that there are no food access-related interventions housed in the clinical domain.
  - c. Some buttons in the other Filter boxes remain blue (or green, depending on which Table you are filtering) meaning you can further refine your analysis using those categories. To continue the current example, if after clicking the Food Access button, only the "Community-Government Relations" and "Research" buttons in the "Filter by Initiative Domain" box remain blue, it means your institution only has food access-related activities in those two domains. If you're only interested in research-related food access work, you can click on the "Research" button to further refine your analysis.
    - i. If you return to the "Initiatives" tab at this point, only "Food Access"-related activities in the "Research" domain will appear. All other data will be hidden. **You've now answered the query "Show me all of our food access-related research."**
- 4) To clear your filters and unhide all data in the "Initiatives" or "Partners" tab, simply select the "Clear Filter" button in the upper right corner of any Filter box you have used in your analysis.

## Report Worksheet/Tab

Queries requiring data from both the “Initiatives” and “Projects” tabs to answer (e.g. “How many internal partners work on our UME efforts to address Health Disparities?” or “On how many cancer-focused partnerships do we collaborate with our local mosque?”) can be addressed via the “Report” tab.

The tab presents a combination of filters (see instructions for the “Filter” tab analyses above) and an interactive report.

Example query 1: “How many internal partners work on our UME efforts to address Health Disparities?”

- 1) First, click the “Health Disparities/Inequities” button in the “Choose Outcomes of Interest” filter box.
- 2) Next, click the “Undergraduate Medical Education (UME)” button in the “Choose Initiative Domain” filter box.
- 3) In the interactive report, expand the “Undergraduate Medical Education (UME)” category in the “Initiative Domain” column by clicking on the ‘+’. The information in the other columns should appear.
- 4) To assess the number of internal partners, go to the “Internal or External” column in the table. Click on the ‘manual filter’ button on the lower right hand side of the column header.
  - a. Unclick “External” so that only “Internal” remains selected.
- 5) **The data in the table now reflect all health disparities-related UME work with internal partners!**
- 6) To clear your filters, simply select the “Clear Filter” button in the upper right corner of any Filter box you have used in your analysis.

Example query 2: “On how many cancer-focused partnerships do we collaborate with our local mosque?”

- 1) First, while holding down the ‘Ctrl’ (PC) or “Command” (Mac) key, click all cancer-related buttons in the “Choose Outcomes of Interest” filter box – i.e. “Cancer, Lung”, “Cancer, Breast”, “Cancer, Colon” and “Cancer, Others”
- 2) To limit results to the specific mosque of interest, click on the ‘manual filter’ button on the lower right hand side of the “External Organization or Internal Department” header and;
  - a. Unselect “(Select All)” so that no check mark appears
  - b. Select the name of the mosque of interest so that it is the only value selected
- 3) **The data in the table now reflect all cancer-related work conducted in partnership with your local mosque!**
- 4) To clear your filters, simply select the “Clear Filter” button in the upper right corner of any Filter box you have used in your analysis.

## How to Manipulate the Report

- **Helpful Hint** – Each field (column) in the Report table can be independently filtered using the filter icon at the top of each column (to the right of the column title). Remember that these filters only apply to the Report worksheet and that they are added to other filters (so don’t forget about them). Filters can always be “stacked” or cumulative which may be the cause of various user issues. Make sure to double check all filters if data does not appear when it should.
- **Drill Down Analysis** – Use the columns to drill down through the data starting with the first column by using the +/- icons on the left of each cell. As the cells are opened, the data within each category will expand throughout the rest of the table. Repeat this for each column as needed for the analysis.
- **Rearrange Column Order** – The columns can be rearranged to fit the specific analysis by selecting a column just above the column title. A small downward-pointing arrow will appear which allows you to select the

entire column. Click and hold down the cursor then drag the column to any location within the table. A thick green box will surround the column when it is properly selected which helps determine where the column is placed. This will automatically rearrange the entire table to adjust for the change. As this table is interactive and dynamic, analysis can be done in many ways depending on how the columns are arranged.

- **Refreshing the Pivot Table** – The Report table is set to automatically refresh both data tables each time the document is opened. However, when new records are added to the tables, the Pivot Table on the Report worksheet must be “refreshed” for the new data to appear in the analysis. This can be done (anytime and however frequently as needed) by navigating to the PivotTable tab within the top ribbon and choosing the Analysis options. Use the button called “Refresh” or “Refresh All” to re-calculate the entire spreadsheet. This will update the PivotTable with the new information added to the Initiatives and Partners data tables.
- **Expanding and Collapsing the Data** – A quick and easy way to expand or collapse the data used in the Report worksheet is to right-click on any cell within the desired column and choose either “Expand All” or “Collapse All” in the pop-up menu. This is the same as manually clicking each of the +/- buttons in each cell within the column, but much quicker.

#### How to Import Data from Subordinate Spreadsheets

- 1) Make sure to save the master spreadsheet before merging the data. It is best to use a name that helps to distinguish the master spreadsheet from its subordinates.
- 2) For each subordinate spreadsheet, select the Initiatives data table in its entirety (including all rows and columns within the data table) and copy them to the clipboard right clicking and selecting ‘copy’ or by using another method.
- 3) Paste this data onto the master Initiatives data table by using the same procedure found in *How to Enter Data on the Initiatives Table* at the beginning of this document. (Tag the data onto the end of the table by selecting the next empty cell proceeding the last row in the first column.)
- 4) Repeat this step for the Partners data table in the subordinate spreadsheet by pasting the data into the Partners data table in the master spreadsheet. The tables will automatically adjust to accommodate the new data if this procedure is done properly.
- 5) Repeat all three of the above steps for each additional subordinate spreadsheet.
- 6) Finally, select the ‘Remove Duplicates’ button within the Data tab on the top ribbon. Always remove duplicates after importing new data as this may prevent errors from occurring in the Report worksheet. A dialog box will appear with the number of duplicates that were found and removed.

## REMEMBER TO SAVE FREQUENTLY