Effective Injury and Incident Trending

User Guide

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Date: March 15, 2018
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Overview and purpose

Module 1
Workers’ Compensation Management Plan

Five Year Cost Reduction Plan

Effective Injury and Incident Trending – User Guide
Plan Pillars

Claims Management
- 801 Form Timely Filing Best Practices
- SAIF Claims Management Best Practices
- Quarterly & As-needed Claims Reviews
- Early Return-to-Work Agency Development
- Global Claims Coordination & Education

Claims Prevention
- Overall Trends Review
- Individual Agency Trends Review & Focus
- Defensive Driving Resources
- Pilot Projects
- Traumatic Incident Response Best Practices
- Best Practices Resources with Agencies & SAIF

Training
- Agency Program Management
- New-to-Position
- Injury and Incident Analysis
- Injury Prevention Topics
- Claims Management

Communication & Outreach
- Monthly Safety Topic
- Quarterly Statewide Safety Managers Meeting
- Risk Connection and Other Seminars
Why

Some Math
• Annual hard-dollar cost = $22 M (medical, disability, legal)
• Approaching 50% of Total Cost of Risk (TCOR) for state
• 1,900 claims (4% of co-workers needing treatment and possible time away from work)

More Math
• 5,700 incidents (13% of our co-workers)
  • assumes 3-to-1 incident-to-claim ratio
• Total annual cost = $220 M (approaching a quarter billion dollars per year)
  • assumes up to a 10-to-1 indirect-to-direct costs ratio
Why

Opportunity to

• Continue caring for our co-workers
• Manage costs (and at a time when liability costs are on the rise)
• Improve productivity, save time, lower stress
• Make history!

Notes and questions
Project goals

• *Sustained* reduction in workers’ compensation costs for the state of Oregon

• Reduce overall costs by 5% per year for the next five years

• Focus on reductions of
  • cost of the insurance policy
  • cost of claims that do/have occurred
  • number of future claims

• No adverse impact to injured workers
Roles

• We are grateful for your interest and participation!
• DAS Risk is committed to, and has moved resources to providing
  • tools, resources, information and training
  • in support of the agencies
  • agencies execute to the best of their ability
• This group stands to make the greatest contribution to the goal
  • And should be duly recognized
The possibilities

Some Math
• 5% goal = $1,000,000 per year
• 5% frequency reduction from this group = 95 fewer injured workers
• Average cost per claim (from this group) = $7,032
• 95 x $7,032 = $668,040
• Plus – savings on the cost of insurance = $140,945

More Math
• TOTAL (from frequency reduction alone) = $808,995
• Include claim management results
  • reserve reduction = $148,500
  • claim handling (2 claims) = $100,000
• GRAND TOTAL = $1,057,495
Injury and incident data

Data types

SAIF Workers Compensation Claims
- SAIF Standard Reports
  - From SAIF or SAIF Website
- Top 15 + All Agency Dashboard
  - Updated Quarterly
- Agency 10-Year Performance Dashboard
  - Updated Quarterly
- Agency Detail Dashboard
  - On Demand
  - Sort by Fiscal or Calendar Year

Internal Incident Reports
- DAS Dashboard Tools
  - SAIF Data Download
- Current and Past Reports
- Safety Tracker
  - Limited Reporting
  - Can Download Data
- Agency-Created Tools
  - Excel Spreadsheet
  - Access Database
  - Other Tools
- Future Reports
- Workday Safety
  - Enter Data Fields
  - Dashboard Reports
  - Export Data

Updated Quarterly
Top 15 + All Agency Dashboard

Top 15 State Agency Dashboard - Workers Compensation - Five Fiscal Years - 7/1/2012 to 6/30/2017

1. DEPARTMENT OF CORRECTIONS
2. OHA HS OREGON STATE HOSPITAL
3. STABILIZATION AND CRISIS UNIT
4. TRANSPORTATION OPERATIONS
5. TRANSPORTATION YOUTH AUTHORITY
6. OREGON STATE POLICE
7. OHSU CVD & DSP DELIVERY
8. DEPARTMENT OF FISH & WILDLIFE
9. FORESTRY DEPARTMENT
10. PARKS & RECREATION DEPARTMENT
11. DEPT OF ADMINISTRATIVE SERVICES
12. DRIVER & MOTOR VEHICLE SERVICES
13. MILITARY DEPARTMENT
14. OREGON HEALTH AUTHORITY
15. OMS AGING & PEOPLE WITH DISABILITIES

Top 15 Agencies - Total Claims

Top 10 Agencies - Total Costs (Paid + Reserved)

Top 10 Agencies - Total Time Losses Days

For definitions of Workers Compensation terms in this report, refer to the SAIF Glossary of Workers Compensation:
https://www.saif.com/glossary.html
## Top 15 + All Agency Dashboard

### Overall State Agency Dashboard - Workers Compensation

<table>
<thead>
<tr>
<th>Agency</th>
<th>Rank Order of Total Claims</th>
<th>Total Claims</th>
<th>Percent of All Claims</th>
<th>Total Timeloss Claims</th>
<th>Percent of All Timeloss Claims</th>
<th>Total Timeloss Days</th>
<th>Percent of All Timeloss Days</th>
<th>Total Paid Costs</th>
<th>Percent of All Paid Costs</th>
</tr>
</thead>
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<tr>
<td>DEPARTMENT OF CORRECTIONS</td>
<td>1</td>
<td>1625</td>
<td>17%</td>
<td>550</td>
<td>19%</td>
<td>22001</td>
<td>19%</td>
<td>$9,508,819</td>
<td>19%</td>
</tr>
<tr>
<td>OHA HS OREGON STATE HOSPITAL</td>
<td>2</td>
<td>1403</td>
<td>15%</td>
<td>540</td>
<td>19%</td>
<td>22215</td>
<td>20%</td>
<td>$7,270,650</td>
<td>14%</td>
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<tr>
<td>STABILIZATION AND CRISIS UNIT</td>
<td>3</td>
<td>911</td>
<td>10%</td>
<td>374</td>
<td>13%</td>
<td>13523</td>
<td>12%</td>
<td>$4,269,563</td>
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<tr>
<td>TRANSPORTATION OPERATIONS</td>
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<td>873</td>
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<td>266</td>
<td>9%</td>
<td>10226</td>
<td>9%</td>
<td>$6,249,867</td>
<td>12%</td>
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<tr>
<td>OREGON YOUTH AUTHORITY</td>
<td>5</td>
<td>610</td>
<td>6%</td>
<td>186</td>
<td>7%</td>
<td>9403</td>
<td>8%</td>
<td>$3,567,600</td>
<td>7%</td>
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<td>OREGON STATE POLICE</td>
<td>6</td>
<td>546</td>
<td>6%</td>
<td>122</td>
<td>4%</td>
<td>3607</td>
<td>3%</td>
<td>$3,101,943</td>
<td>6%</td>
</tr>
<tr>
<td>DHS CW &amp; SSP DELIVERY</td>
<td>7</td>
<td>504</td>
<td>5%</td>
<td>119</td>
<td>4%</td>
<td>3886</td>
<td>3%</td>
<td>$1,742,077</td>
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<td>DEPARTMENT OF FISH &amp; WILDLIFE</td>
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<td>4%</td>
<td>67</td>
<td>2%</td>
<td>3151</td>
<td>3%</td>
<td>$2,699,871</td>
<td>3%</td>
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<td>FORESTRY DEPARTMENT</td>
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<td>2%</td>
<td>2549</td>
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<td>$1,367,005</td>
<td>3%</td>
</tr>
<tr>
<td>PARKS &amp; RECREATION DEPARTMENT</td>
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<td>301</td>
<td>3%</td>
<td>77</td>
<td>3%</td>
<td>3629</td>
<td>3%</td>
<td>$1,645,911</td>
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<td>DEPT OF ADMINISTRATIVE SERVICES</td>
<td>11</td>
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<td>2%</td>
<td>49</td>
<td>2%</td>
<td>1601</td>
<td>1%</td>
<td>$572,976</td>
<td>1%</td>
</tr>
<tr>
<td>DRIVER &amp; MOTOR VEHICLES SERVICES</td>
<td>12</td>
<td>145</td>
<td>2%</td>
<td>45</td>
<td>2%</td>
<td>2563</td>
<td>2%</td>
<td>$1,223,117</td>
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<td>MILITARY DEPARTMENT</td>
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<td>143</td>
<td>2%</td>
<td>37</td>
<td>1%</td>
<td>2011</td>
<td>1%</td>
<td>$1,255,548</td>
<td>2%</td>
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<tr>
<td>OREGON HEALTH AUTHORITY</td>
<td>14</td>
<td>129</td>
<td>1%</td>
<td>30</td>
<td>1%</td>
<td>757</td>
<td>1%</td>
<td>$414,653</td>
<td>1%</td>
</tr>
<tr>
<td>DHS AGING &amp; PEOPLE WITH DISABILITIES</td>
<td>15</td>
<td>118</td>
<td>1%</td>
<td>22</td>
<td>1%</td>
<td>435</td>
<td>0%</td>
<td>$343,118</td>
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<td>114</td>
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<td>20</td>
<td>1%</td>
<td>855</td>
<td>1%</td>
<td>$524,860</td>
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<td>22</td>
<td>1%</td>
<td>872</td>
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<td>91</td>
<td>1%</td>
<td>22</td>
<td>1%</td>
<td>802</td>
<td>1%</td>
<td>$452,689</td>
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<td>DEPARTMENT OF AGRICULTURE</td>
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<td>1%</td>
<td>20</td>
<td>1%</td>
<td>1425</td>
<td>1%</td>
<td>$587,306</td>
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<td>79</td>
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<td>20</td>
<td>1%</td>
<td>1085</td>
<td>1%</td>
<td>$450,691</td>
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<tr>
<td>DHS CENTRAL AND SHARED SERVICES</td>
<td>20</td>
<td>78</td>
<td>1%</td>
<td>19</td>
<td>1%</td>
<td>586</td>
<td>1%</td>
<td>$194,169</td>
<td>0%</td>
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<td>DEPT OF CONSUMER &amp; BUSINESS SERVICES</td>
<td>21</td>
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<td>18</td>
<td>1%</td>
<td>759</td>
<td>1%</td>
<td>$418,943</td>
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<td>OREGON LIQUOR CONTROL COMMISSION</td>
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<td>73</td>
<td>1%</td>
<td>23</td>
<td>1%</td>
<td>868</td>
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<td>71</td>
<td>1%</td>
<td>18</td>
<td>1%</td>
<td>886</td>
<td>1%</td>
<td>$347,084</td>
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<td>1%</td>
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<td>351</td>
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<td>$305,605</td>
<td>0%</td>
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<tr>
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<td>46</td>
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<td>4</td>
<td>0%</td>
<td>61</td>
<td>0%</td>
<td>$47,394</td>
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</tbody>
</table>
Agency 10-Year Performance Dashboard

State Agency Dashboard - Workers Compensation - Ten Fiscal Years - 7/1/2007 to 6/30/2017

Effective Injury and Incident Trending – User Guide
Agency Detail Dashboard

ODOT - Overall Calendar Year Dashboard - Workers Compensation - All Data - 1/1/2012 to 1/1/18

- Total Claim Count by Calendar Year
- Total Claim Count by Area
- Total Claim Costs (Paid + Reserved) by Calendar Year
- Total Claim Costs (Paid + Reserved) by Area
- Average Claim Costs (Paid + Reserved) by Calendar Year
- Average Claim Costs (Paid + Reserved) by Area

Top 10 Grouped Claim Causes:
- Slips, Trips, Falls
- Struck by Vehicle, F.E.
- Caught by Machine
- Pinch or Crushed
- Other

Timely Claim Filing (Within 5 Days):
- No, 10%
- Yes, 92%

Effective Injury and Incident Trending – User Guide
Workday Project page

[Diagram]

Project details
- Functionality overview
- Informational handouts
- Foundational documents
- Implementation schedule
- Frequently asked questions (FAQ)

Workday training
- Workday training overview
- Workday sneak peek
- iLearn access for project materials (log-in)

Communication outlets
- Newsletter
- Blog
- Twitter
- In the news
- Team directory

www.oregon.gov/das/HR/pages/workday.aspx
Injury and incident data

Workday Safety

Enter Data Fields in System

Pre-Enter This Year’s Incidents on Spreadsheet?

Upload Spreadsheet Incidents?

Input or Upload Past Incidents?

Dashboard Reports

Export Data

Contact Dan Jones, DAS Workday Project for more info

Effective Injury and Incident Trending – User Guide
Agency Detail Dashboard overview

Module 2
Dashboard software

• Need Microsoft Office Excel version 2010 or later
• Excel added Slicers in these later versions
• This guide shows screen shots of Excel version 2013
• Older versions may look slightly different but have the same functions
Agency Detail Dashboard

Department of Corrections - Overall Dashboard - Workers Compensation - Five Fiscal Years - 7/1/2011 to 6/30/2016

Effective Injury and Incident Trending – User Guide
Dashboard structure

- SAIF Data
- Pivot Tables
  - Pivot Charts
  - Linked Pictures
- Dashboard
- Slicers
- Instructions
Dashboard content

- Sortable Slicers for Fiscal Year(s), Claim Type, Area Code, Dept. Code, Time, Cause, Nature, Body Part, Day of Week, Month, Tenure, and Age Range
- Frequency, costs, and average costs tables by fiscal year and by area
- Claim cause top 10 pie chart
- Timely filing pie chart
- Top 10 most-costly claims table with timeloss days
- Claim type table with count, average costs, average timeloss costs, and average timeloss days
- Time of injury pie chart
- Day of week and month bar charts
- Tenure and age pie charts
- Detailed cause, nature, body part, tenure, age, timely filing tables with color-scales
Video tutorials

Introduction to Pivot Tables, Pivot Charts, Slicers, and Dashboards

Part 1 https://www.youtube.com/watch?v=9NUjHBNWe9M

Part 2 https://www.youtube.com/watch?v=g530cnFfk8Y

Part 3 https://www.youtube.com/watch?v=FyggutiBKvU
Working with SAIF claims data

Module 3
SAIF data overview

• All the 801 form worker injury claims submitted to SAIF since January 1, 2002 are kept in a database
  • SAIF enters the 801 form details, claim status, and claim costs into the database

• You can specially code all your claims in the 801 form Area and Department form boxes

• At the SAIF Business Online site you can do raw data dumps to Excel for any date range

Notes and questions
SAIF data definitions

• Refer to SAIF Glossary of Workers Compensation Terms
  https://www.saif.com/glossary.html
SAIF data good practices

• Treat SAIF data downloads as confidential information
• Limit access to the Dashboard tool or remove employee names from the data set
• Large numbers of imported claims data can slow down the Dashboard tool
  • Work with 5 or 10 year data sets at a time
• Download fresh data every 3 to 6 months
• Use caution with more recent claims data because info could change
  • Best to wait a 3 to 6 month lag time from the injury date because claims decisions and costs can change
Area and department coding

• A powerful analysis tool if done well and completely
• Can use up to six numbers and/or letters for each field
• Correct or update info directly with your SAIF contact
  • Print out claims list and mark up, or provide claims numbers with changes
  • SAIF will make changes in their database
  • Changes show up in the next data download
Area and department coding

- SAIF has offered to make corrections going 5 years back, or longer, depending on the number of claims.
- Can make own short-term corrections in data columns until fixed, but freshly downloaded data will replace these corrections until fixed permanently.
- The Dashboard’s pivot table grouping function can help you to group codes and name the groups in meaningful ways. Learn more about pivot table field grouping.

Notes and questions
Download and import SAIF data

Basic steps

• Download data file from SAIF Business Online
• Copy and paste data into Agency Dashboard Excel tool
• Change data range
• Refresh data
SAIF data download update

Internet Browser

- Don't use Internet Explorer (IE)
  - Can get this Error Message
  - IE not supported
- Use Mozilla Firefox or Google Chrome
SAIF Online landing page

Effective Injury and Incident Trending – User Guide
1. Log in to SAIF Overview page
2. Select Claims by Date of Injury button
3. Enter Date of Injury range
4. Press Retrieve button
5. Press Excel Download button
6. Save the CSV Download file to your Agency Detail Dashboard working folder

Effective Injury and Incident Trending – User Guide
Data download from SAIF
SAIF data import steps

1. Open the CSV Download file
2. COPY all the data EXCEPT Row 1 which contains the column headers
3. In the Agency Detail Dashboard Excel document, choose the red SAIF Data-Agency Detail worksheet tab
4. Select all the data from Row 2 down and PASTE the NEW data into the worksheet over the old data
SAIF data import steps

5. Note the LAST row of the NEW data. Row 990 in this case.
6. Choose the FORMULAS ribbon in the task bar.
7. Select the Name Manager icon.
SAIF data import steps

8. Scroll down to the TableRange2 formula and select
   This formula links to ALL the pivot tables at once

9. Enter the NEW data’s last row number in the Refers To box. 990 in this case

10. Select the Green Check mark to update data range
SAIF data import steps

11. Select the DATA ribbon

12. Select the Refresh All icon

13. Go to the dark yellow Agency Dashboard worksheet to view the new or updated claims trends
Troubleshooting Tips

Module 4
Check dashboard after import

Dashboard visuals sometimes need adjusting after importing new or different data. Examples

- Pie chart has out-of-order color pattern (sometimes when slicing, too) Learn how to fix
- Table color scales have white sections Learn how to fix
- Tables are cut off Learn how to fix
- Odd times or causes don’t fit into the groupings Learn how to fix
Dashboard operation

• Work in the Agency Dashboard worksheet tab to slice the SAIF data and print reports

• From the slicer control panel on the left side, select Fiscal Year(s), Claim Type, Area Code, Dept. Code, Time, Cause, Nature, Body Part, Day of Week, Month, Tenure, and Age Range. Learn more about Slicers.

• The tables and charts on the Agency Dashboard automatically update when the slicer buttons are selected or changed.
Dashboard operation

• You can select single or multiple items in each slicer. Hold down the Control or Shift keys to select more than one item.

• Select the Clear Filter - Red X in the upper right corner of the slicer box to reset the slicer selection.

• The slicers connect to the various “Agency” pivot table worksheets with the yellow tabs, which then connect back to the Agency Dashboard. Learn more about Pivot Tables.
Dashboard operation

• Change the report Title in the top cell (C1) to describe how the data is sliced.

• Print out Adobe Acrobat (PDF) or Excel (XLS) reports from this worksheet. Learn more about Printing.
Printing Tips

Module 6
Printing Tips

• Print out Adobe Acrobat (PDF) or Excel (XLS) reports from the Agency Dashboard worksheet tab

• Select Page Break Preview in the View ribbon to show how report will break out into each page
Printing Tips

• **Continued** - The layout best fits and prints on 11 x 17 paper

• Save the report as an Adobe Acrobat PDF document to share electronically, or display on a Smart Board, monitor, or screen

• To save as a PDF, select the FILE ribbon and select Save as Adobe PDF
Printing Tips

• **Continued** - Choose the worksheet(s) to convert to PDF (Agency Dashboard in this case)

• Select **Convert to PDF** and the PDF document will pop up to view

• Check that the text and visuals converted properly
Chart Tips

Module 7
Charts overview

• The pie charts and bar graphs in the Agency Dashboard worksheet tab connect to the original pivot charts in the yellow worksheet tabs.

• They are linked copies, so the data updates when the data changes in the original pivot chart.

• You can change the chart title, labels, format, and color scheme in the Agency Dashboard without effecting the original pivot chart.
Chart connection

- Follow this process to fix or replace charts in the Agency Dashboard worksheet tab.
- To see how the chart connection works, select the first yellow worksheet tab called Agency – FY#.
- Select the pivot chart to the right of the pivot table and right click on the chart.
- Select Copy.
Chart connection

• **Continued** - select a cell below the original pivot chart
• Right click on the cell
• In the dropdown menu, select the second *Paste Options* > *Keep Source Formatting (K)*
• A connected copy of the chart will be pasted just below the current pivot chart
Chart color correction

Pie chart has out-of-order color pattern after importing data or slicing data

• Select the entire pie chart by clicking on a blank white part like in the upper right corner.
Chart color correction

Pie chart has out-of-order color pattern after importing data or slicing data

- Continued - the PIVOTCHART TOOLS Ribbon group will appear
- Select the DESIGN Ribbon
- Select Change Colors at the left of the toolbar
Chart color correction

Pie chart has out-of-order color pattern after importing data or slicing data

• Continued - the Change Colors dropdown menu will appear

• Click on the current color selection (monochromatic blue in this case) to correct the color order on the pie chart

• Select other color schemes to change the pie chart colors
Linked Pictures Tips

Module 8
Linked pictures purpose

- All the data tables in the Agency Dashboard worksheet tab are linked pictures of pivot tables found elsewhere in the tool.
- A linked picture’s image changes when the linked pivot table changes.
- Linked pictures preserve and protect the original pivot tables in case a table on the dashboard is accidentally deleted.

![Claim Types Table]

<table>
<thead>
<tr>
<th>Claim Type</th>
<th>Claim Count</th>
<th>Average Claim Costs (Paid + Reserved)</th>
<th>Average Time Loss Costs (Paid + Reserved)</th>
<th>Average Time Loss Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disabling</td>
<td>85</td>
<td>$10,169</td>
<td>$1,726</td>
<td>24</td>
</tr>
<tr>
<td>Fatal</td>
<td>1</td>
<td>$900,681</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Nondisabling</td>
<td>375</td>
<td>$935</td>
<td>0</td>
<td>0</td>
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<tr>
<td>PPD</td>
<td>37</td>
<td>$40,745</td>
<td>$5,332</td>
<td>91</td>
</tr>
<tr>
<td>Grand Total</td>
<td>498</td>
<td>$6,653</td>
<td>$691</td>
<td>11</td>
</tr>
</tbody>
</table>

![Top 10 Most Costly Claims Table]

<table>
<thead>
<tr>
<th>Injury Description</th>
<th>Rank Order</th>
<th>Total Claim Costs (Paid + Reserved)</th>
<th>Total Time Loss Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>mva/motorcycle crash</td>
<td>1</td>
<td>$590,681</td>
<td>0</td>
</tr>
<tr>
<td>moving chair, strain back</td>
<td>2</td>
<td>$548,821</td>
<td>1564.5</td>
</tr>
<tr>
<td>fell down stairs, left wrist fracture</td>
<td>3</td>
<td>$184,770</td>
<td>370.5</td>
</tr>
<tr>
<td>stepped off step/twisted r ankle/fell</td>
<td>4</td>
<td>$129,009</td>
<td>279</td>
</tr>
<tr>
<td>mva, rear ended and strain back</td>
<td>5</td>
<td>$108,640</td>
<td>0</td>
</tr>
<tr>
<td>fell walking down stairs</td>
<td>6</td>
<td>$79,011</td>
<td>30</td>
</tr>
<tr>
<td>fell from chair, r shoulder injury</td>
<td>7</td>
<td>$72,226</td>
<td>7</td>
</tr>
<tr>
<td>repetative motion caused r shldr</td>
<td>8</td>
<td>$64,183</td>
<td>36</td>
</tr>
<tr>
<td>twist foot, hit shelf, inj right shoulde</td>
<td>9</td>
<td>$63,692</td>
<td>103</td>
</tr>
<tr>
<td>pain in left wrist, carpal tunnel</td>
<td>10</td>
<td>$63,079</td>
<td>256</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>$1,904,111</td>
<td>2646</td>
</tr>
</tbody>
</table>
To see how the linked picture connection works, double-click on a table in the Agency Dashboard tab.

This will take you to the original pivot table in one of the yellow worksheet tabs.

The entire pivot table in the yellow worksheet tab is now selected.
• Continued - to create a linked picture, select the entire pivot table or part of a pivot table in any one of the yellow worksheet tabs
• Right click on any part of the selected pivot table
• Select Copy from the dropdown menu
Linked pictures demo

- Continued – Select and right click on a cell below the current pivot table

- Select Paste Options > Paste Special > Other Paste Options > Linked Picture

- The linked picture will paste below the pivot table and its image will change as the pivot table data changes
Linked pictures tips

• A linked picture’s image changes when the original linked pivot table changes
• The linked picture can be resized and stretched but the specific cells it links to do not change
• The linked picture can be selected and moved around anywhere on the worksheet like clipart
• If the linked pivot table’s number of rows changes, it’s image will shrink or expand in the linked picture while the picture stays the same size
Linked pictures tips

- If the pivot table expands outside the linked picture size, rows will be cut off.
- If so, you will need to re-paste the pivot table as a new linked picture following the steps on the previous pages.
- Linked pictures preserve and protect the original pivot tables in case a table on the dashboard is accidentally deleted.

Notes and questions
Color scaling overview

• Color scaling of the data in tables helps viewers easily see patterns like high, low and ranges of data

• The next pages show how to correct or update the color scaling on the Agency Dashboard worksheet tab

• Use the same process to insert color scaling in new or uncolored data tables
Color scaling correction

Table color scales on the Agency Dashboard worksheet have white rows.

- The dashboard table is actually a picture linked to a pivot table in one of the yellow worksheet tabs. Learn more about linked pictures.
- The white sections happen when the pivot table adds new row data that it hasn’t seen before.
- Note in this example, the second Back, Upper row SAIF had entered spaces after the words in their database, so the pivot table sees it as new data.
Color scaling correction

Table color scales on the Agency Dashboard worksheet have white sections

- **Continued** – to correct, double-click on the table in the Agency Dashboard worksheet tab
- This will take you to the original pivot table in one of the yellow worksheet tabs
- The entire pivot table in the yellow worksheet tab is now selected
Table color scales on the Agency Dashboard worksheet have white sections

- **Continued** - Select the entire column of data you want to reset the color scaling
- Select the HOME ribbon and Conditional Formatting in the task bar
Color scaling correction

Table color scales on the Agency Dashboard worksheet have white sections

- Continued – Select Color Scales from the dropdown menu and the Red – Yellow – Green Color Scale option

- This process will update the pivot table’s color scale and the linked picture image in the Agency Dashboard worksheet tab

- Use the same process for new or uncolored data tables
Slicers overview

- Work in the Agency Dashboard worksheet tab to slice the SAIF data and print reports
- From the slicer control panel on the left side, select Fiscal Year(s), Claim Type, Area Code, Dept. Code, Time, Cause, Nature, Body Part, Day of Week, Month, Tenure, and Age Range
- The tables and charts on the Agency Dashboard automatically update when the slicer buttons are selected or changed
Slicers overview

• You can select single or multiple items in each slicer. Hold down the Control or Shift keys to select more than one item.

• Select the Clear Filter - Red X in the upper right corner of the slicer box to reset the slicer selection.

• The slicers connect to the various “Agency” pivot table worksheets with the yellow tabs, which then connect back to the Agency Dashboard. Learn more about Pivot Tables.
Field grouping overview

• In the red SAIF Data-Agency Detail raw data tab, the name of each column is a field option for the pivot tables and pivot charts.

• The data within a pivot table field option such as Injury Cause or Time of Injury, Area Code, or Body Part can be grouped in useful ways.

• A new grouping creates a new pivot table field, which then can be made into a new slicer. Learn more about slicers.
Field grouping help

- Special pivot table field groupings such as by districts, regions, time of day, or body parts need to be tailored to each agency’s unique needs.
- The field grouping techniques are an intermediate-to-advanced-level skill.
- Contact a DAS Risk Consultant for in-person coaching assistance.

### Claim Cause

<table>
<thead>
<tr>
<th>Claim Cause</th>
<th>Total Claim Count</th>
<th>Average Claim Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burns</td>
<td>5</td>
<td>$425</td>
</tr>
<tr>
<td>Caught In/Under</td>
<td>3</td>
<td>$294</td>
</tr>
<tr>
<td>Cumulative</td>
<td>10</td>
<td>$7,425</td>
</tr>
<tr>
<td>Cut/Puncture</td>
<td>14</td>
<td>$280</td>
</tr>
<tr>
<td>Fall/Slip or Trip From Elevation</td>
<td>13</td>
<td>$4,263</td>
</tr>
<tr>
<td>Fall/Slip or Trip on Same Level</td>
<td>44</td>
<td>$7,718</td>
</tr>
<tr>
<td>Misc. Causes</td>
<td>20</td>
<td>$10,149</td>
</tr>
<tr>
<td>Misc. Causes Not Otherwise Classified</td>
<td>3</td>
<td>$178</td>
</tr>
<tr>
<td>Motor Vehicle</td>
<td>24</td>
<td>$6,244</td>
</tr>
<tr>
<td>Strain by Bodily Motion</td>
<td>110</td>
<td>$9,990</td>
</tr>
<tr>
<td>Struck by Animal or Object</td>
<td>19</td>
<td>$1,685</td>
</tr>
<tr>
<td>Struck By Person or Object by Person</td>
<td>2</td>
<td>$3,120</td>
</tr>
<tr>
<td>Struck/Stepped</td>
<td>21</td>
<td>$1,034</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>288</strong></td>
<td><strong>$6,904</strong></td>
</tr>
</tbody>
</table>

### Time of Injury

<table>
<thead>
<tr>
<th>Time of Injury</th>
<th>Total Claim Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. 12 AM to 4 AM</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>b. 4 AM to 8 AM</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>c. 8 AM to 12 PM</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>d. 12 PM to 4 PM</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>e. 4 PM to 8 PM</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>f. 8 PM to 12 AM</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>g. Blank</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>100%</strong></td>
<td></td>
</tr>
</tbody>
</table>
Online courses

Module 12
Video tutorials

Introduction to Pivot Tables, Pivot Charts, Slicers, and Dashboards

Part 1 https://www.youtube.com/watch?v=9NUjHBNWe9M
Part 2 https://www.youtube.com/watch?v=g530cnFfk8Y
Part 3 https://www.youtube.com/watch?v=FyggutiBKvU
Special Dashboards
Module 13
Special dashboards overview

- Special dashboards include body charts, area or district maps, vehicle damage maps, and institution or campus maps.
- The process begins with special pivot table field groupings such as by body parts, districts, regions, location, and needs to be tailored to each agency’s unique needs.
- Then, linked pictures of the pivot table parts are positioned on the main graphic (i.e., body or map).
- The special-dashboard-building techniques are an intermediate-to-advanced-level skill.
- Contact a DAS Risk Consultant for in-person coaching.
Body part dashboard

- Built for DPSST
- Grouped by the common body parts injured
Body part dashboard

- Courtesy of Allison Hewlett, OSP Safety Officer, and Trooper Cook (model)
- Grouped by the common body parts injured
Region dashboard

• Courtesy of Allison Hewlett, OSP Safety Officer

• Grouped by the Regions
Questions

• Contact the DAS Risk Management Consulting Team
  
  egs_risk_consulting_team_dist@oregon.gov
  (503) 373-7233

• Visit the DAS Risk Management Dashboards page
  
  http://www.oregon.gov/das/Risk/Pages/Dshbrds.aspx