



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



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

Tramatic 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

Notes and questions



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
- $95 \times \$7,032 = \$668,040$
- 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

Internal Incident Reports

SAIF Standard Reports

From SAIF or SAIF Website

DAS Dashboard Tools

SAIF Data Download

Current and Past Reports

Future Reports

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

Safety Tracker
Limited Reporting
Can Download Data

Agency-Created Tools
Excel Spreadsheet
Access Database
Other Tools

Workday Safety
Enter Data Fields
Dashboard Reports
Export Data



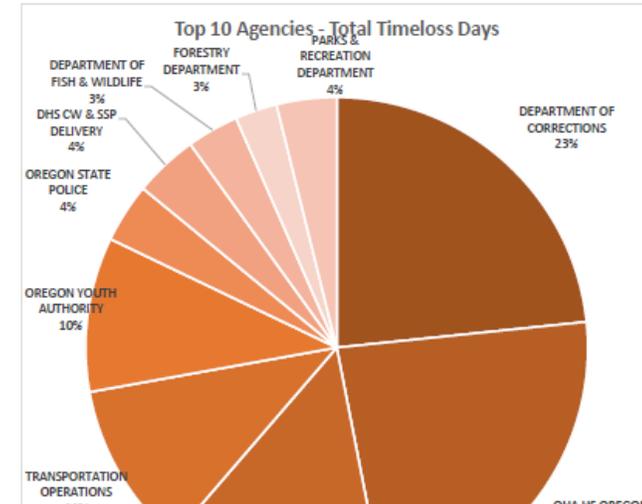
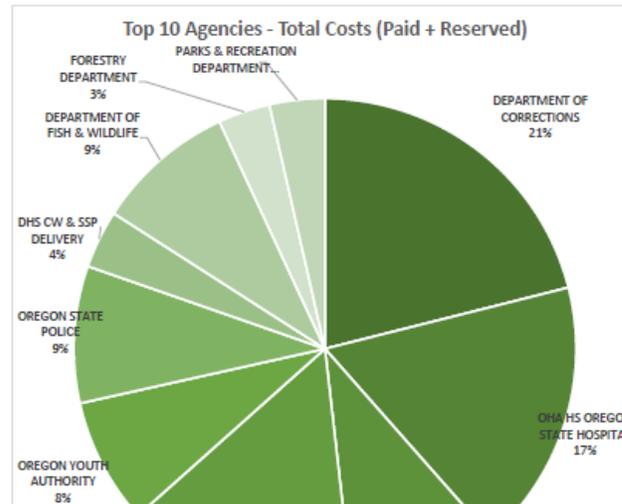
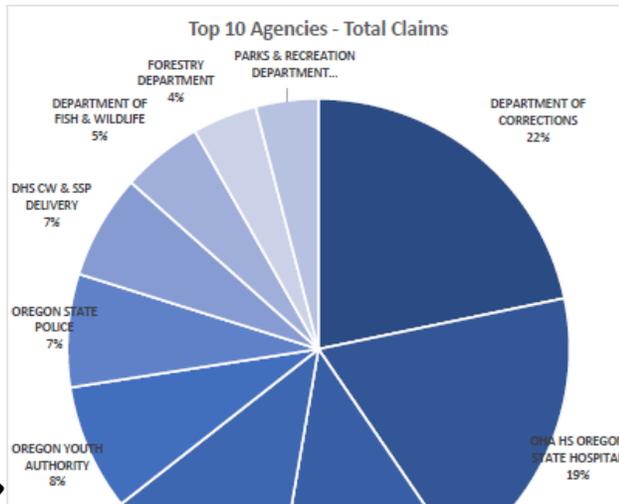
Top 15 + All Agency Dashboard

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

Top 15 State Agencies - Rank Order Within Top 15							
Agency	Total Claims	Total Timeloss Claims	Total Timeloss Days	Total Costs (Paid + Reserved)	Total Costs/Standard Premium Loss Ratios	Total Reported Payroll	Average Overall Rank
DEPARTMENT OF CORRECTIONS	1	1	2	1	9	1	2.5
OHA HS OREGON STATE HOSPITAL	2	2	1	2	2	5	2.3
STABILIZATION AND CRISIS UNIT	3	3	3	4	1	14	4.7
TRANSPORTATION OPERATIONS	4	4	4	3	8	3	4.3
OREGON YOUTH AUTHORITY	5	5	5	7	5	8	5.8
OREGON STATE POLICE	6	6	8	6	7	6	6.5
DHS CW & SSP DELIVERY	7	7	6	9	13	2	7.3
DEPARTMENT OF FISH & WILDLIFE	8	9	9	5	4	9	7.3
FORESTRY DEPARTMENT	9	11	11	11	10	12	10.7
PARKS & RECREATION DEPARTMENT	10	8	7	10	6	13	9.0
DEPT OF ADMINISTRATIVE SERVICES	11	10	13	14	12	10	11.7
DRIVER & MOTOR VEHICLES SERVICES	12	12	10	12	11	11	11.3
MILITARY DEPARTMENT	13	13	12	8	3	15	10.7
OREGON HEALTH AUTHORITY	14	14	14	13	15	4	12.3
DHS AGING & PEOPLE WITH DISABILITIES	15	15	15	15	14	7	13.5

Top 15 State Agencies - Rates and Averages			
Agency	Claims Per \$100K Payroll	Average Cost Per Claim	Average Days Per Timeloss Claim
DEPARTMENT OF CORRECTIONS	0.14	\$ 6,688	40
OHA HS OREGON STATE HOSPITAL	0.36	\$ 6,418	41
STABILIZATION AND CRISIS UNIT	0.79	\$ 5,407	36
TRANSPORTATION OPERATIONS	0.12	\$ 8,971	38
OREGON YOUTH AUTHORITY	0.26	\$ 6,859	51
OREGON STATE POLICE	0.15	\$ 8,361	30
DHS CW & SSP DELIVERY	0.06	\$ 3,838	33
DEPARTMENT OF FISH & WILDLIFE	0.17	\$ 11,912	47
FORESTRY DEPARTMENT	0.16	\$ 5,549	54
PARKS & RECREATION DEPARTMENT	0.25	\$ 6,092	47
DEPT OF ADMINISTRATIVE SERVICES	0.07	\$ 4,744	33
DRIVER & MOTOR VEHICLES SERVICES	0.07	\$ 9,370	57
MILITARY DEPARTMENT	0.16	\$ 15,964	54
OREGON HEALTH AUTHORITY	0.02	\$ 8,458	25
DHS AGING & PEOPLE WITH DISABILITIES	0.05	\$ 2,956	20
Top 15 Agencies Composite	0.14	\$ 7,032	40

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 DAS

Overall State Agency Dashboard - Workers Compensation

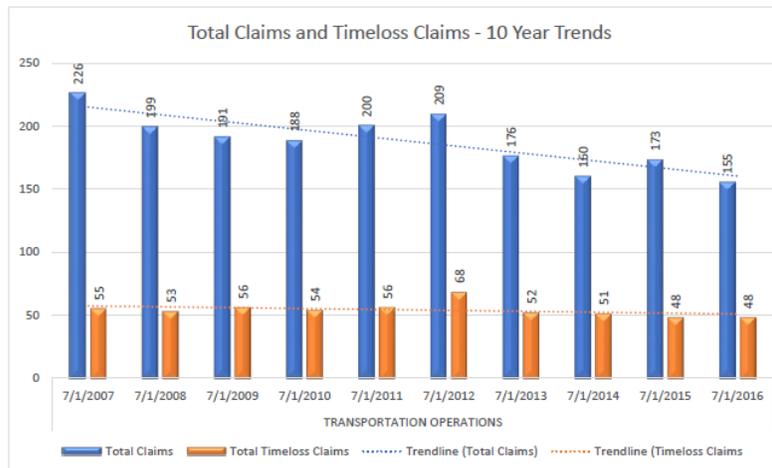
Agency	Rank Order of Total Claims	Total Claims	Percent of All Claims	Total Timeloss Claims	Percent of All Timeloss Claims	Total Timeloss Days	Percent of All Timeloss Days	Total Paid Costs	Percent of All Paid Costs
DEPARTMENT OF CORRECTIONS	1	1625	17%	550	19%	22001	19%	\$ 9,508,819	19%
OHA HS OREGON STATE HOSPITAL	2	1403	15%	540	19%	22215	20%	\$ 7,270,650	14%
STABILIZATION AND CRISIS UNIT	3	911	10%	374	13%	13523	12%	\$ 4,269,563	8%
TRANSPORTATION OPERATIONS	4	873	9%	266	9%	10226	9%	\$ 6,249,867	12%
OREGON YOUTH AUTHORITY	5	610	6%	186	7%	9403	8%	\$ 3,567,600	7%
OREGON STATE POLICE	6	546	6%	122	4%	3607	3%	\$ 3,101,943	6%
DHS CW & SSP DELIVERY	7	504	5%	119	4%	3886	3%	\$ 1,742,077	3%
DEPARTMENT OF FISH & WILDLIFE	8	390	4%	67	2%	3151	3%	\$ 2,699,871	5%
FORESTRY DEPARTMENT	9	311	3%	47	2%	2549	2%	\$ 1,367,005	3%
PARKS & RECREATION DEPARTMENT	10	301	3%	77	3%	3629	3%	\$ 1,645,911	3%
DEPT OF ADMINISTRATIVE SERVICES	11	155	2%	49	2%	1601	1%	\$ 572,976	1%
DRIVER & MOTOR VEHICLES SERVICES	12	145	2%	45	2%	2563	2%	\$ 1,223,117	2%
MILITARY DEPARTMENT	13	143	2%	37	1%	2011	2%	\$ 1,255,548	2%
OREGON HEALTH AUTHORITY	14	129	1%	30	1%	757	1%	\$ 414,658	1%
DHS AGING & PEOPLE WITH DISABILITIES	15	118	1%	22	1%	435	0%	\$ 343,118	1%
JUDICIAL DEPARTMENT	16	114	1%	20	1%	855	1%	\$ 524,860	1%
DEPARTMENT OF JUSTICE	17	92	1%	22	1%	872	1%	\$ 367,686	1%
EMPLOYMENT DEPARTMENT	18	91	1%	22	1%	802	1%	\$ 452,689	1%
DEPARTMENT OF AGRICULTURE	19	79	1%	20	1%	1425	1%	\$ 587,306	1%
DEPARTMENT OF ENVIRONMENTAL QUALITY	19	79	1%	33	1%	1085	1%	\$ 450,691	1%
DHS CENTRAL AND SHARED SERVICES	20	78	1%	19	1%	586	1%	\$ 194,169	0%
DEPT OF CONSUMER & BUSINESS SERVICES	21	77	1%	18	1%	759	1%	\$ 418,943	1%
OREGON LIQUOR CONTROL COMMISSION	22	73	1%	23	1%	868	1%	\$ 246,412	0%
DEPARTMENT OF REVENUE	23	71	1%	18	1%	886	1%	\$ 347,084	1%
OREGON DEPT OF TRANSPORTATION	24	65	1%	13	0%	351	0%	\$ 305,605	1%
DEPARTMENT OF EDUCATION	25	46	0%	4	0%	61	0%	\$ 47,394	0%



Agency 10-Year Performance Dashboard

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

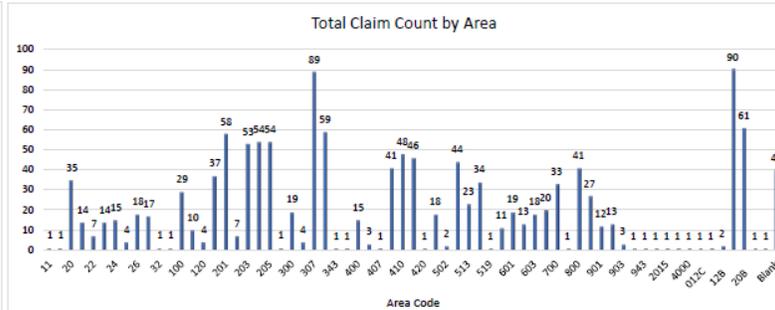
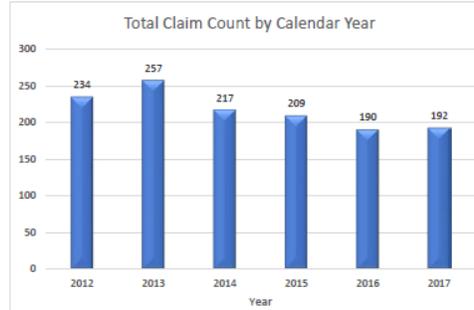
Agency	Total Claims	Percent of All Claims	Total Timeloss Claims	Percent of All Timeloss Claims	Total Timeloss Days	Percent of All Timeloss Days	Total Incurred Losses	Percent of Incurred Losses	Incurred Losses to Standard Premium Loss Ratio	Total Payroll	Percent of All Payroll	Claims Per \$100K Payroll	Average Cost Per Claim	Average Days Per Timeloss Claim
TRANSPORTATION OPERATIONS	1877	100%	541	100%	22889	100%	\$ 18,494,101	100%	112%	\$ 1,366,105,105	100%	0.14	\$ 9,853	42
7/1/2007	226	12%	55	10%	2766	12%	\$ 1,829,085	10%	128%	\$ 122,569,771	9%	0.18	\$ 8,093	50
7/1/2008	199	11%	53	10%	2202	10%	\$ 1,702,837	9%	113%	\$ 130,760,046	10%	0.15	\$ 8,557	42
7/1/2009	191	10%	56	10%	3068	13%	\$ 3,476,369	19%	233%	\$ 129,952,134	10%	0.15	\$ 18,201	55
7/1/2010	188	10%	54	10%	1992	9%	\$ 1,390,889	8%	87%	\$ 134,749,152	10%	0.14	\$ 7,398	37
7/1/2011	200	11%	56	10%	2827	12%	\$ 2,252,756	12%	149%	\$ 131,356,019	10%	0.15	\$ 11,264	50
7/1/2012	209	11%	68	13%	2289	10%	\$ 1,593,225	9%	88%	\$ 131,726,693	10%	0.16	\$ 7,623	34
7/1/2013	176	9%	52	10%	2569	11%	\$ 1,483,660	8%	76%	\$ 138,380,098	10%	0.13	\$ 8,430	49
7/1/2014	160	9%	51	9%	1878	8%	\$ 1,804,276	10%	94%	\$ 142,354,058	10%	0.11	\$ 11,277	37
7/1/2015	173	9%	48	9%	2067	9%	\$ 1,764,178	10%	92%	\$ 148,138,522	11%	0.12	\$ 10,198	43
7/1/2016	155	8%	48	9%	1231	5%	\$ 1,196,826	6%	63%	\$ 156,118,612	11%	0.10	\$ 7,721	26
Grand Total	1877	100%	541	100%	22889	100%	\$ 18,494,101	100%	112%	\$ 1,366,105,105	100%	0.14	\$ 9,853	42



Agency Detail Dashboard

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

DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES
RISK MANAGEMENT | EGS
PO Box 12000
Salem, OR 97306-0000
503-373-7475
503-373-7337 fax



Workday Project page

The screenshot displays the Workday Project page with three main sections:

- Project details** (magnifying glass icon):
 - [Functionality overview](#)
 - [Informational handouts](#)
 - [Foundational documents](#)
 - [Implementation schedule](#)
 - [Frequently asked questions \(FAQ\)](#)
- Workday training** (graduation cap icon):
 - [Workday training overview](#)
 - [Workday sneak peek](#)
 - [iLearn access for project materials \(log-in\)](#)
- Communication outlets** (speech bubbles icon):
 - [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

Dashboard Reports

Export Data

Pre-Enter This Year's Incidents on Spreadsheet?

Upload Spreadsheet Incidents?

Input or Upload Past Incidents?

Contact Dan Jones, DAS Workday Project for more info





Agency Detail Dashboard overview

Module 2



Dashboard software

Notes and questions

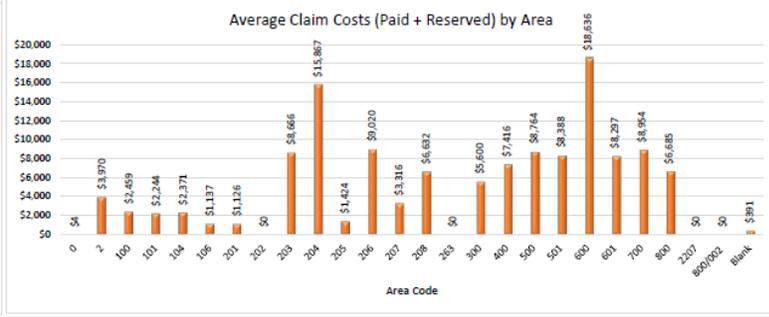
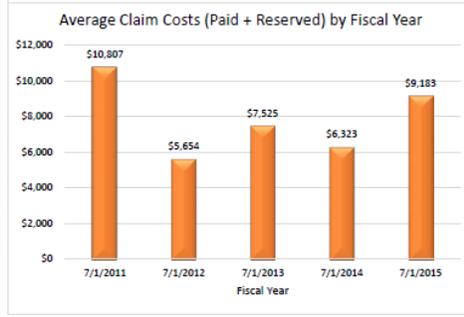
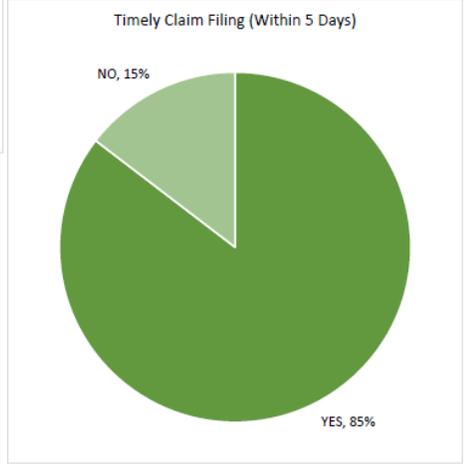
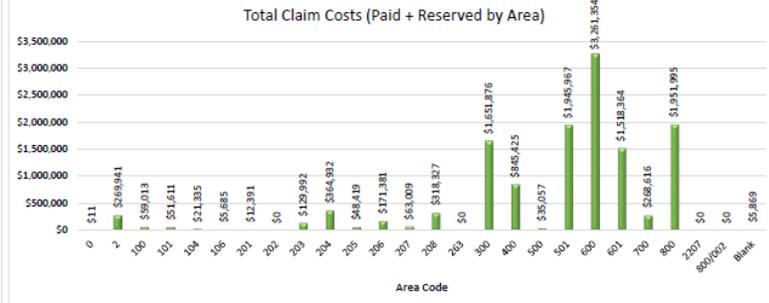
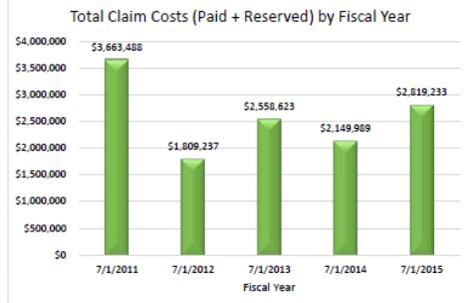
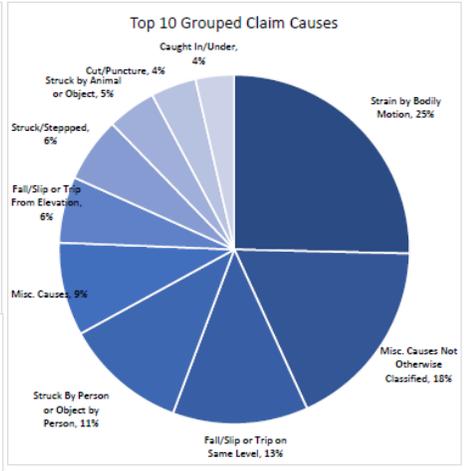
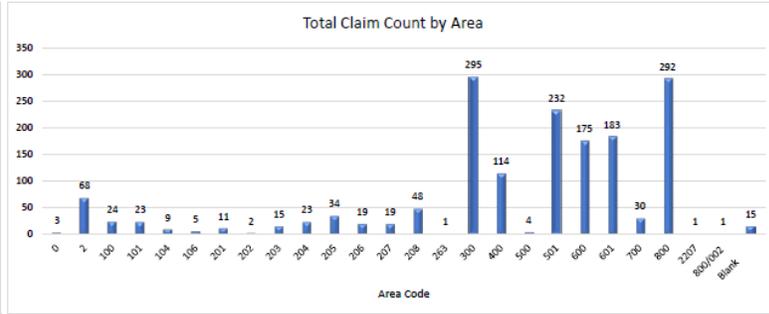
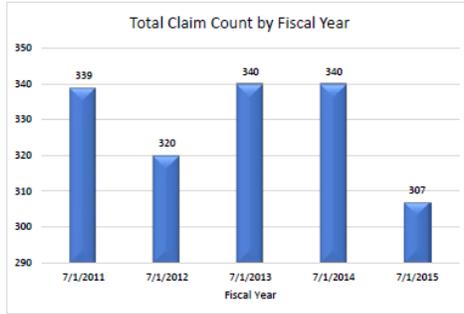
- Need Microsoft Office Excel version 2010 or later
- Excel added Slicers in these later versions
- This guide shows screen shots of Excel version 2013
- Older versions may look slightly different but have the same functions



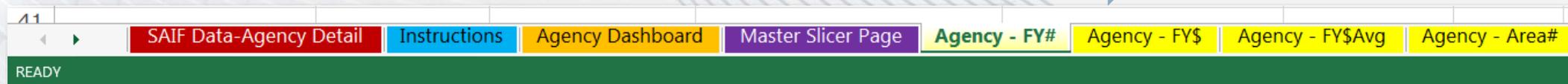
Agency Detail Dashboard

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

DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES
Risk Management | 808
PO Box 12009
Salem, OR 97306-0000
503.372.7475
503.372.7337 fax



Dashboard structure



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 s
- 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

Notes and questions

- 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



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

Notes and questions

- 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

Notes and questions

- 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](#)



Download and import SAIF data

Basic steps

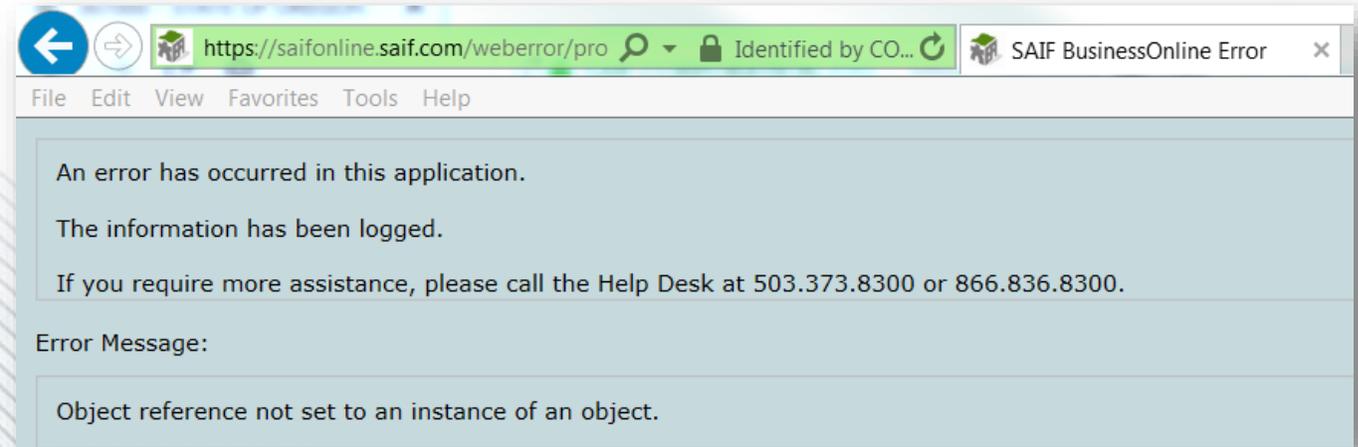
- Download data file from SAIF Business Online
- Copy and paste data into Agency Dashboard Excel tool
- Change data range
- Refresh data



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 login page

Secure site login

SAIF CORPORATION (US) | https://saifonline.saif.com/OnlineLogin/loginscreen.aspx

WORKERS' COMPENSATION INSURANCE FOR OREGON 800.285.8525 saif.com Feedback

English

saif Work. Life. Oregon.

Secure site login

User ID

Password [Forgot your user ID?](#)

[Forgot your password?](#)

Login

Need to create a user ID?

- [Employer](#)
- [Agent](#)
- [Medical provider](#)
- [Worker](#)

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<https://saifonline.saif.com/OnlineLogin/loginscreen.aspx>



SAIF Online landing page

367000 - STATE OF OREGON - X

SAIF CORPORATION (US) | https://saifonline.saif.com/OreGovOnline/frmOreGovDefault.aspx | 150% | saif.com | Logout | Fee

saifcorporation Overview

Favorites Change Password

All Applications

- ▶ Certificates
- ▶ Claim Profile
- ▶ Claim Reports
- ▶ Dividends
- ▶ ND Claims Reimbursement
- ▶ Policy Changes
- ▶ Policyholder Portal
- ▶ Policyholder Profile
- ▶ Resources

State Agency

- Overview
- Loss Control
- Claims Management
- EAIP Paid

Overview Loss Control Claims Management EAIP Paid

STATE OF OREGON - 367000 (Combination Totals) Data as of: 12/13/2017 Zoom In

Select Claims by Policy Period Select Claims by Date of Injury

From Date of Injury: Through Date of Injury: Value Date: 12/13/2017

Filter the data by:

Claim Status: All

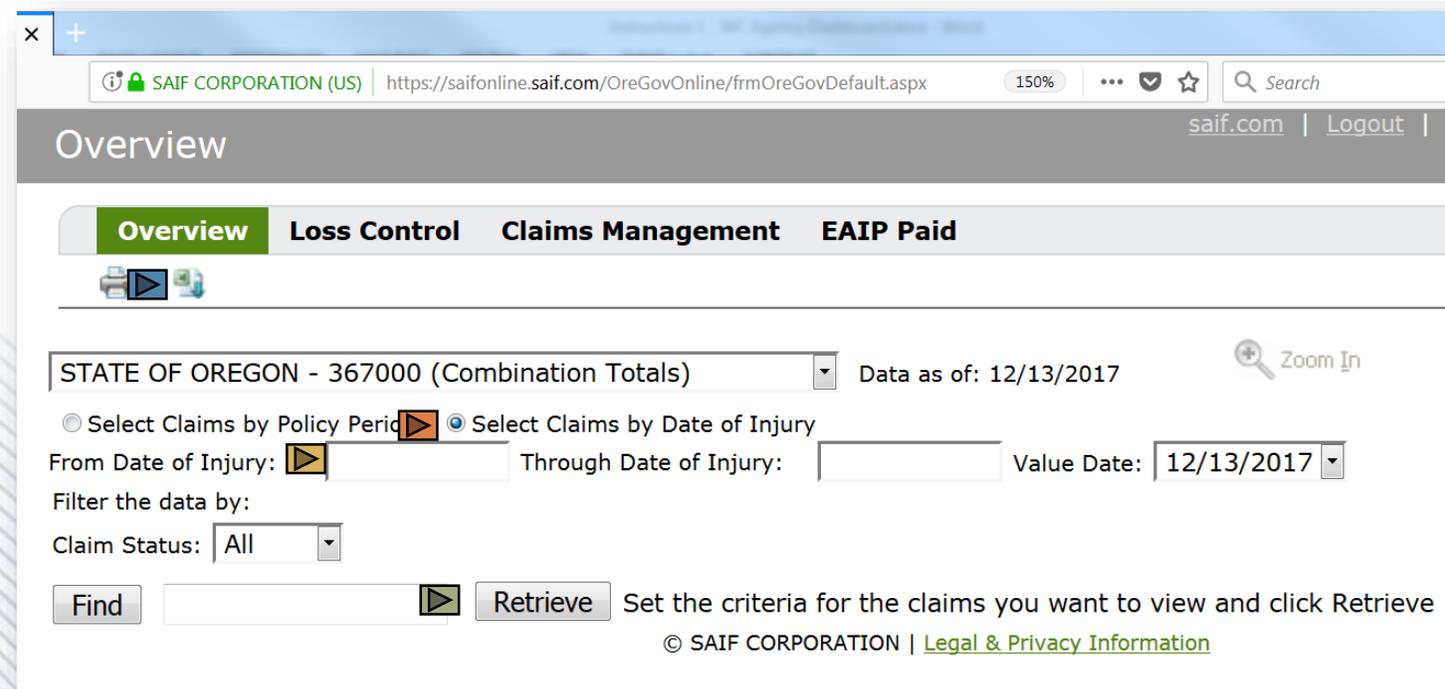
Find Retrieve Set the criteria for the claims you want to view and click Retrieve

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SAIF data download steps

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



The screenshot shows a web browser window with the URL <https://saifonline.saif.com/OreGovOnline/frmOreGovDefault.aspx>. The page title is "Overview" and the breadcrumb trail includes "saif.com | Logout". The main navigation menu has four tabs: "Overview" (selected), "Loss Control", "Claims Management", and "EAIP Paid". Below the navigation, there are icons for a printer and a refresh button. The search area shows "STATE OF OREGON - 367000 (Combination Totals)" in a dropdown menu, with "Data as of: 12/13/2017" and a "Zoom In" icon. There are two radio buttons: "Select Claims by Policy Period" (unselected) and "Select Claims by Date of Injury" (selected). Below these are input fields for "From Date of Injury:" and "Through Date of Injury:", and a "Value Date:" dropdown menu set to "12/13/2017". A "Filter the data by:" section includes a "Claim Status:" dropdown menu set to "All". At the bottom, there are "Find" and "Retrieve" buttons, with a "Find" icon next to the "Find" button. A footer note says "© SAIF CORPORATION | [Legal & Privacy Information](#)".



Data download from SAIF

	A	B	C	D	E	F	G	I	J	K	L
1	Age	Age Range	Area Code	Body Part	CDA Amou	CDA Paid	Claim Incu	Claim Paid	Claim Stat	Claim Status	Claim Type
2	66	60-69	91	Knee	0	NO	0	0	New	11/9/2017	Nondisabl
3	40	40-49	208	Knee	0	NO	0	0	New	11/14/2017	Nondisabl
4	57	50-59	300	Hand	0	NO	0	0	New	11/8/2017	Disabling
5	27	21-29	601	Finger(s)	0	NO	0	0	New	11/13/2017	Nondisabl
6	23	21-29	600	Knee	0	NO	0	0	Open	11/6/2017	Nondisabl
7	42	40-49	300	Foot	0	NO	0	0	New	11/6/2017	Disabling
8	52	50-59			0	NO	0	0	New	11/1/2017	Nondisabl
9	26	21-29	800	Knee	0	NO	0	0	New	10/31/2017	Nondisabl
10	31	30-39	800	Hand	0	NO	18.97	18.97	Open	11/7/2017	Nondisabl
11	51	50-59	800	Body Syste	0	NO	0	0	Open	11/8/2017	Nondisabl
12	33	30-39	800	Thumb	0	NO	37.94	37.94	Closed	11/9/2017	Nondisabl
13	29	21-29	800	Body Syste	0	NO	0	0	Open	11/13/2017	Nondisabl
14	26	21-29	601	Finger(s)	0	NO	0	0	Closed	11/2/2017	Nondisabl
15	42	40-49	400	Hand	0	NO	0	0	Open	11/13/2017	Nondisabl
16	37	30-39	601	Body Syste	0	NO	0	0	New	11/1/2017	Nondisabl
17	37	30-39	800	Finger(s)	0	NO	0	0	Closed	11/9/2017	Nondisabl
18	53	50-59	800	Back, Upp	0	NO	0	0	New	11/1/2017	Nondisabl
19	48	40-49	501	Shoulder(s)	0	NO	0	0	New	11/13/2017	Nondisabl
20	58	50-59	2	Multiple B	0	NO	0	0	New	11/14/2017	Disabling
21	40	40-49	800	Knee	0	NO	0	0	New	11/1/2017	Nondisabl
22	46	40-49	501	Thumb	0	NO	1304	1304	Closed	10/20/2017	Nondisabl
23	67	60-69	2	Elbow	0	NO	183.42	183.42	Open	11/7/2017	Nondisabl
24	47	40-49	400	Knee	0	NO	1934.07	1934.07	Open	11/1/2017	Disabling



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

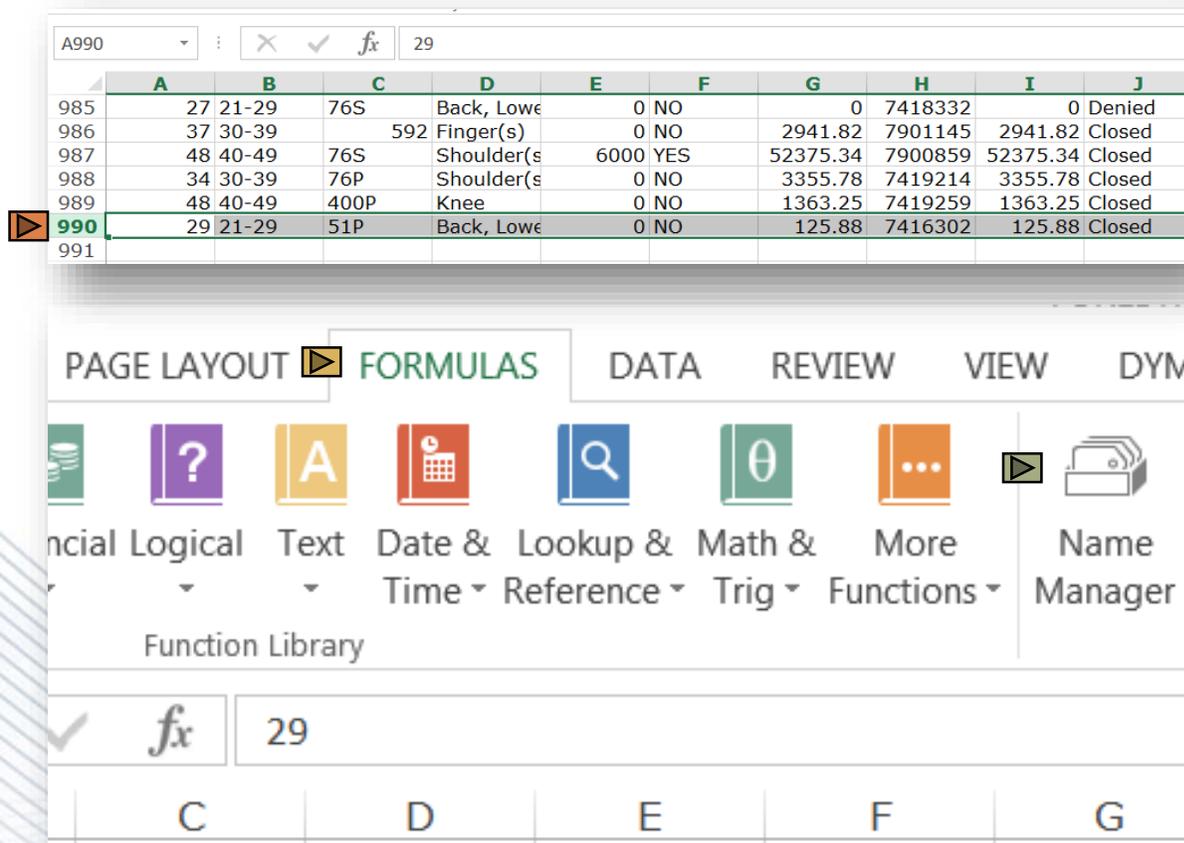


	A	B	C	D	E	F	G	H	I	J
1	Age	Age Range	Area Code	Body Part	CDA Amou	CDA Paid	Claim Incu	Claim Nurr	Claim Paid	Claim Sta
2										
3										
4										
5										
6										



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 



The screenshot shows an Excel spreadsheet with a table of data. Row 990 is highlighted in green. Below the spreadsheet, the 'FORMULAS' ribbon is selected, and the 'Name Manager' icon is highlighted with a green play button icon.

	A	B	C	D	E	F	G	H	I	J
985	27	21-29	76S	Back, Lowe	0	NO	0	7418332	0	Denied
986	37	30-39	592	Finger(s)	0	NO	2941.82	7901145	2941.82	Closed
987	48	40-49	76S	Shoulder(s)	6000	YES	52375.34	7900859	52375.34	Closed
988	34	30-39	76P	Shoulder(s)	0	NO	3355.78	7419214	3355.78	Closed
989	48	40-49	400P	Knee	0	NO	1363.25	7419259	1363.25	Closed
990	29	21-29	51P	Back, Lowe	0	NO	125.88	7416302	125.88	Closed
991										



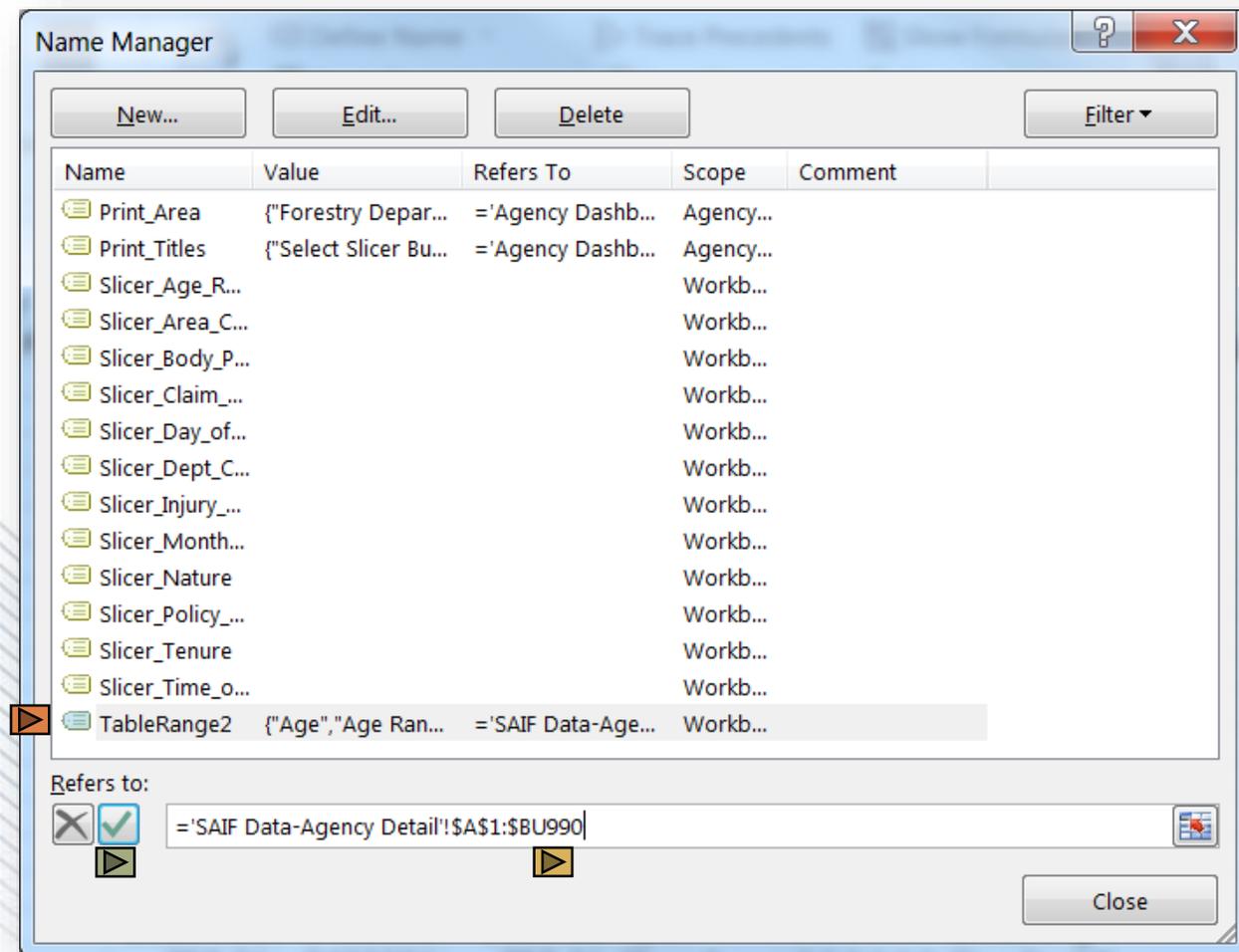
SAIF data import steps

8. Scroll down to the *TableRange2* formula and select 

This formula links to ALL the pivot tables at once

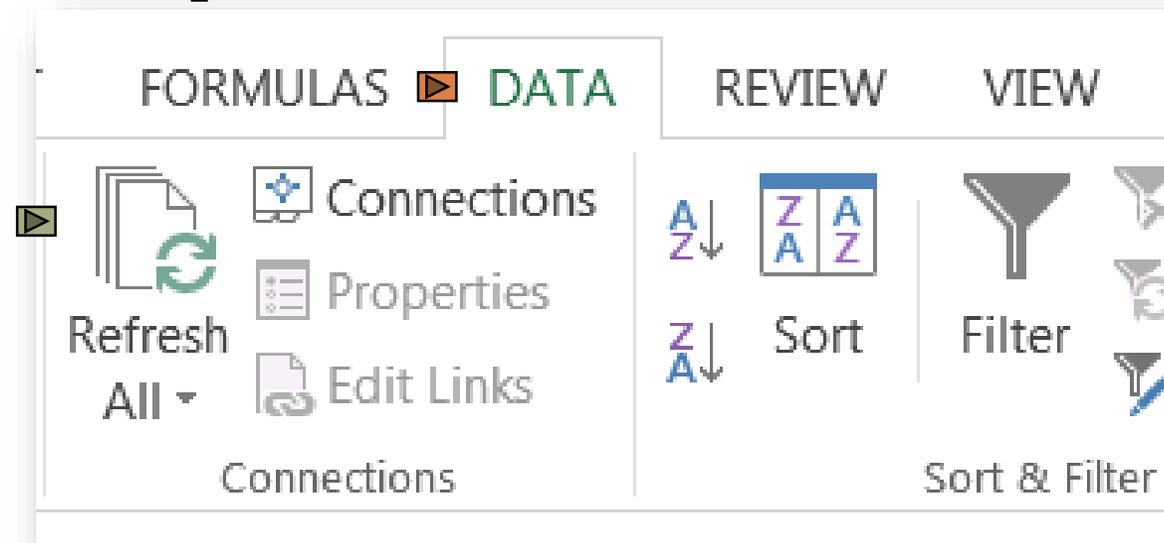
9. Enter the NEW data's last row number in the *Refers To* box. 990 in this case 

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](#)





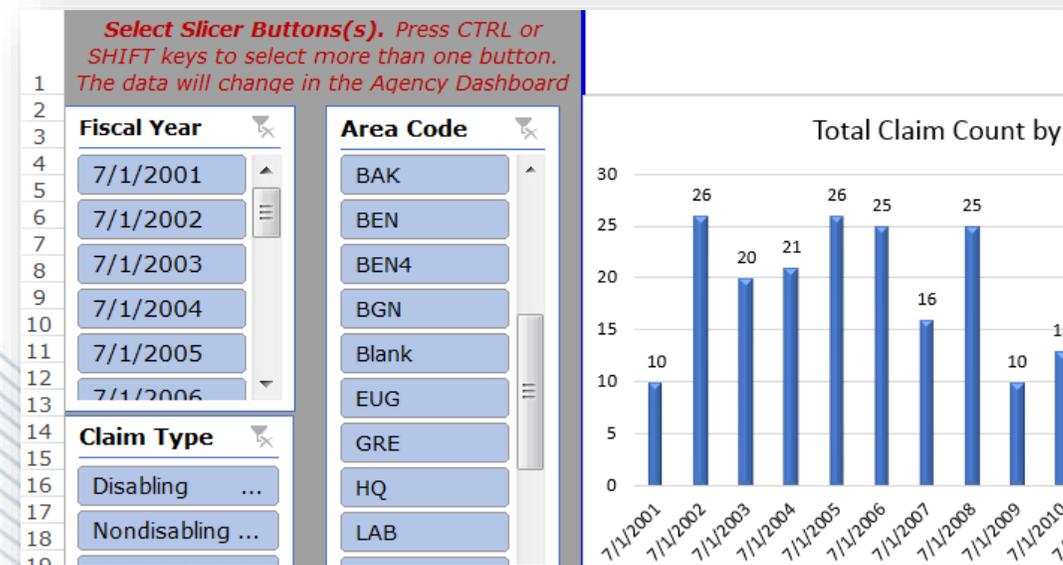
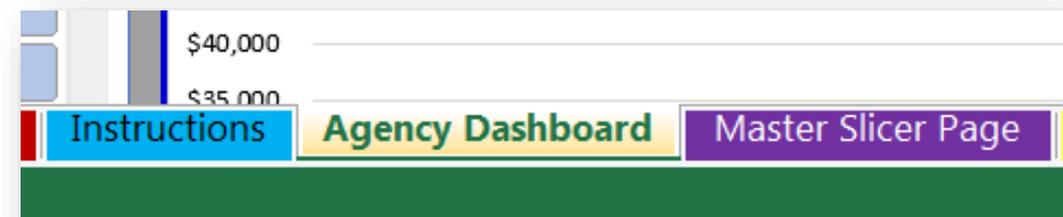
Operation Tips

Module 5



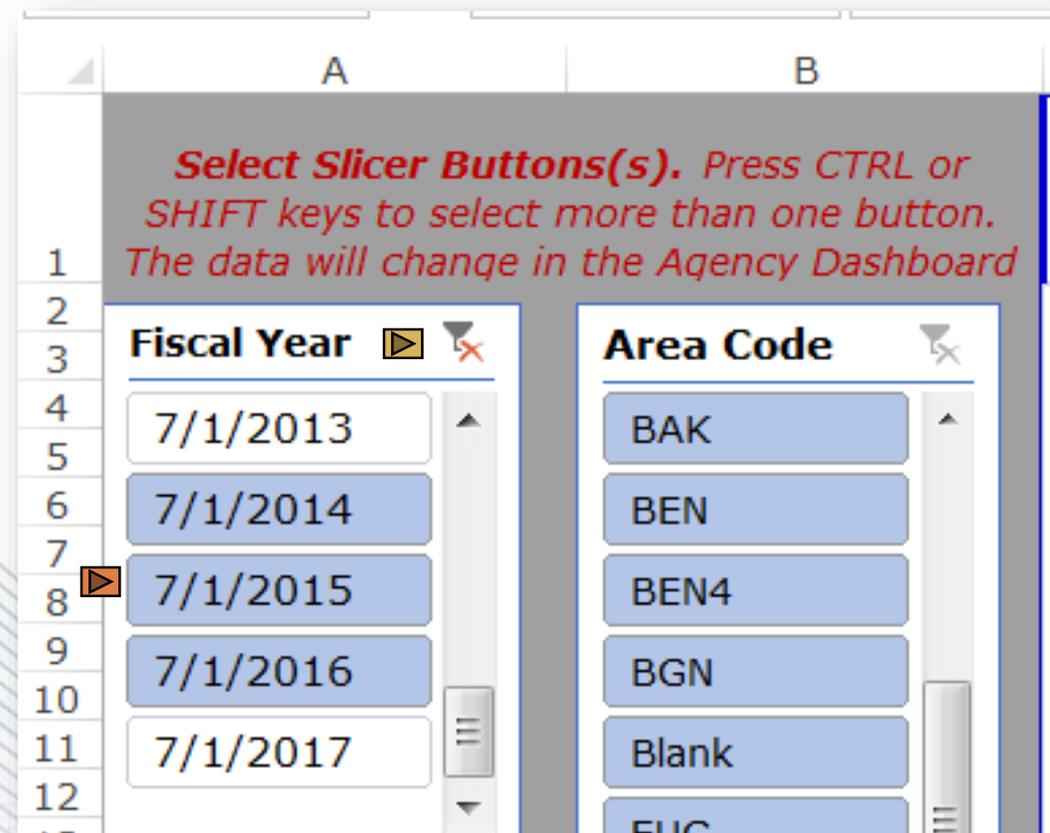
Dashboard operation

- 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



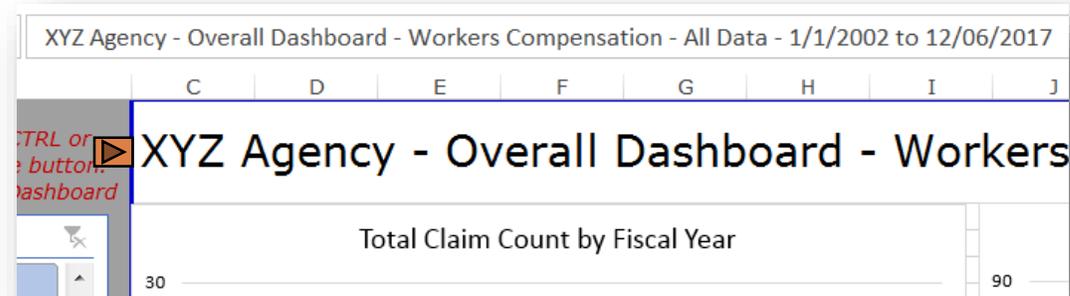
Dashboard operation

- 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](#)



The screenshot shows an Excel spreadsheet with the following content:

	C	D	E	F	G	H	I	J
	XYZ Agency - Overall Dashboard - Workers Compensation - All Data - 1/1/2002 to 12/06/2017							
	XYZ Agency - Overall Dashboard - Workers							
	Total Claim Count by Fiscal Year							
	30							90





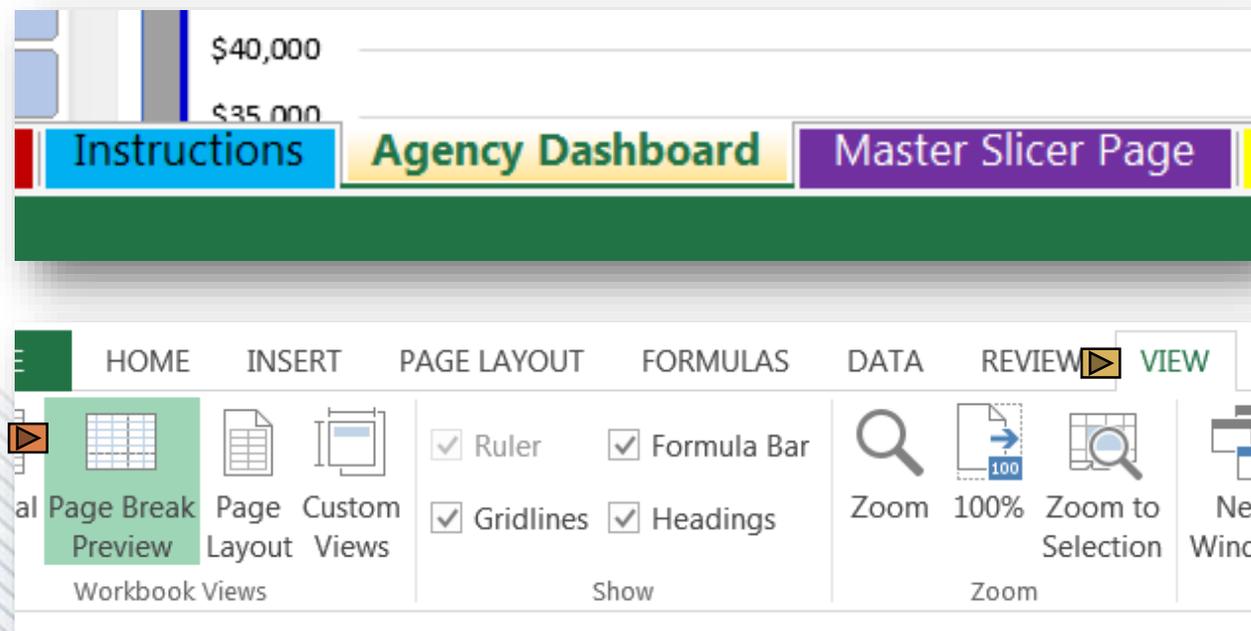
Printing Tips

Module 6



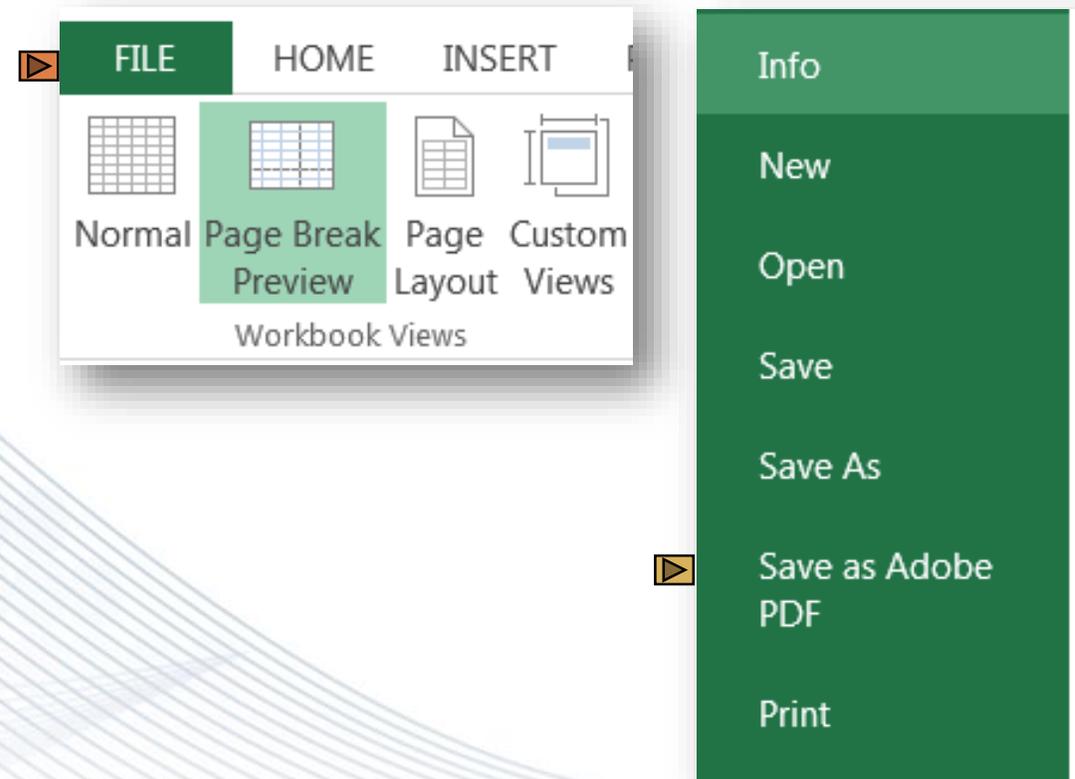
Printing Tips

- 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

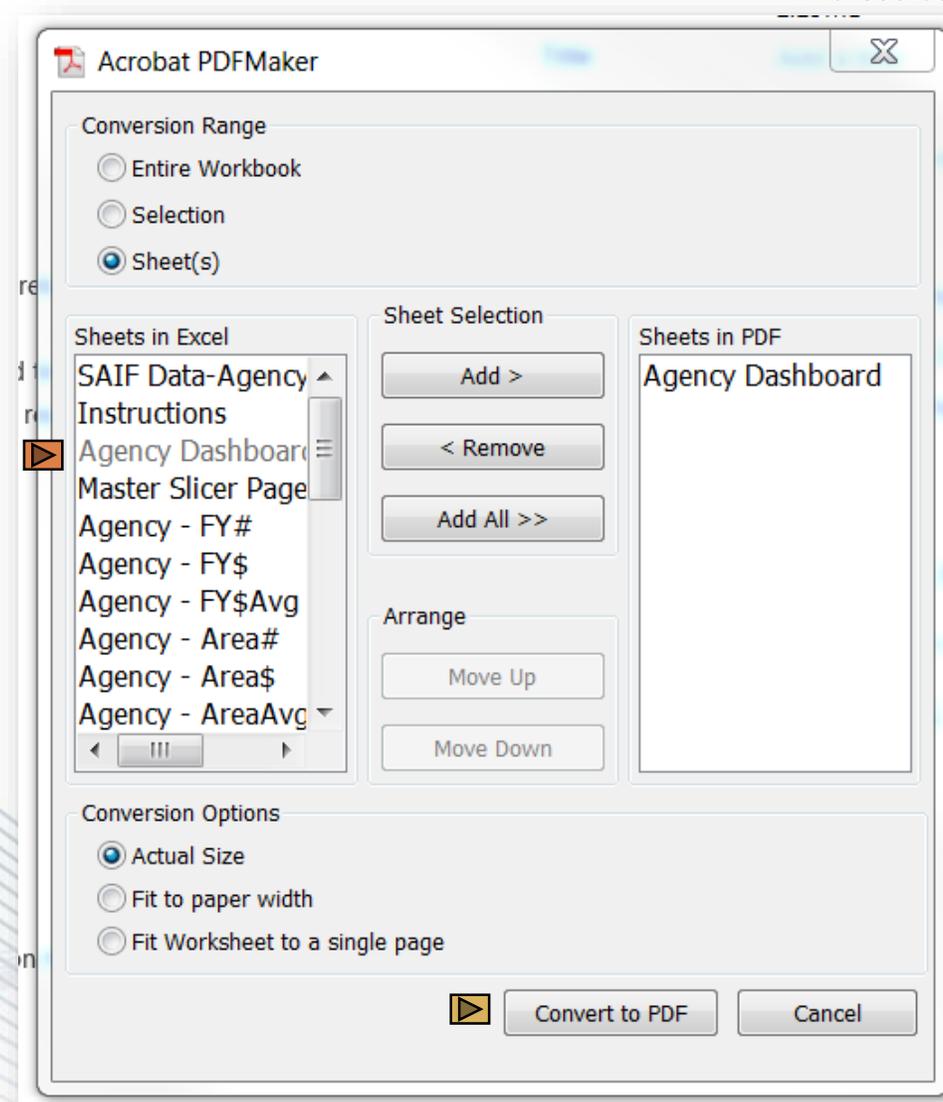




Chart Tips

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

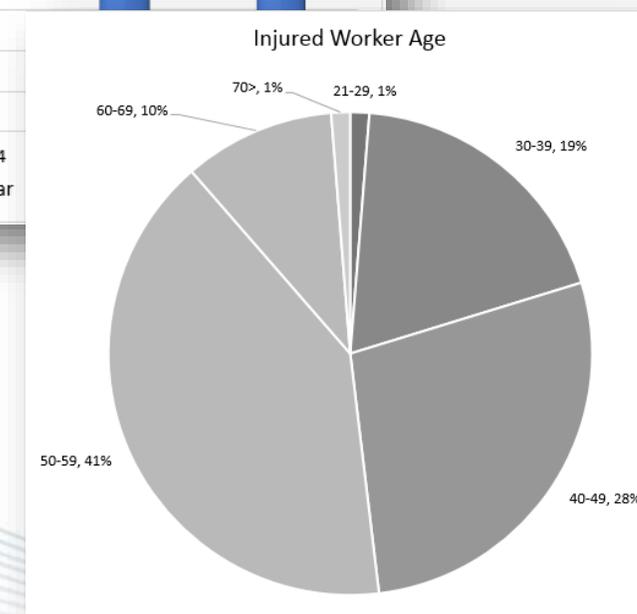


Chart connection

- 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*

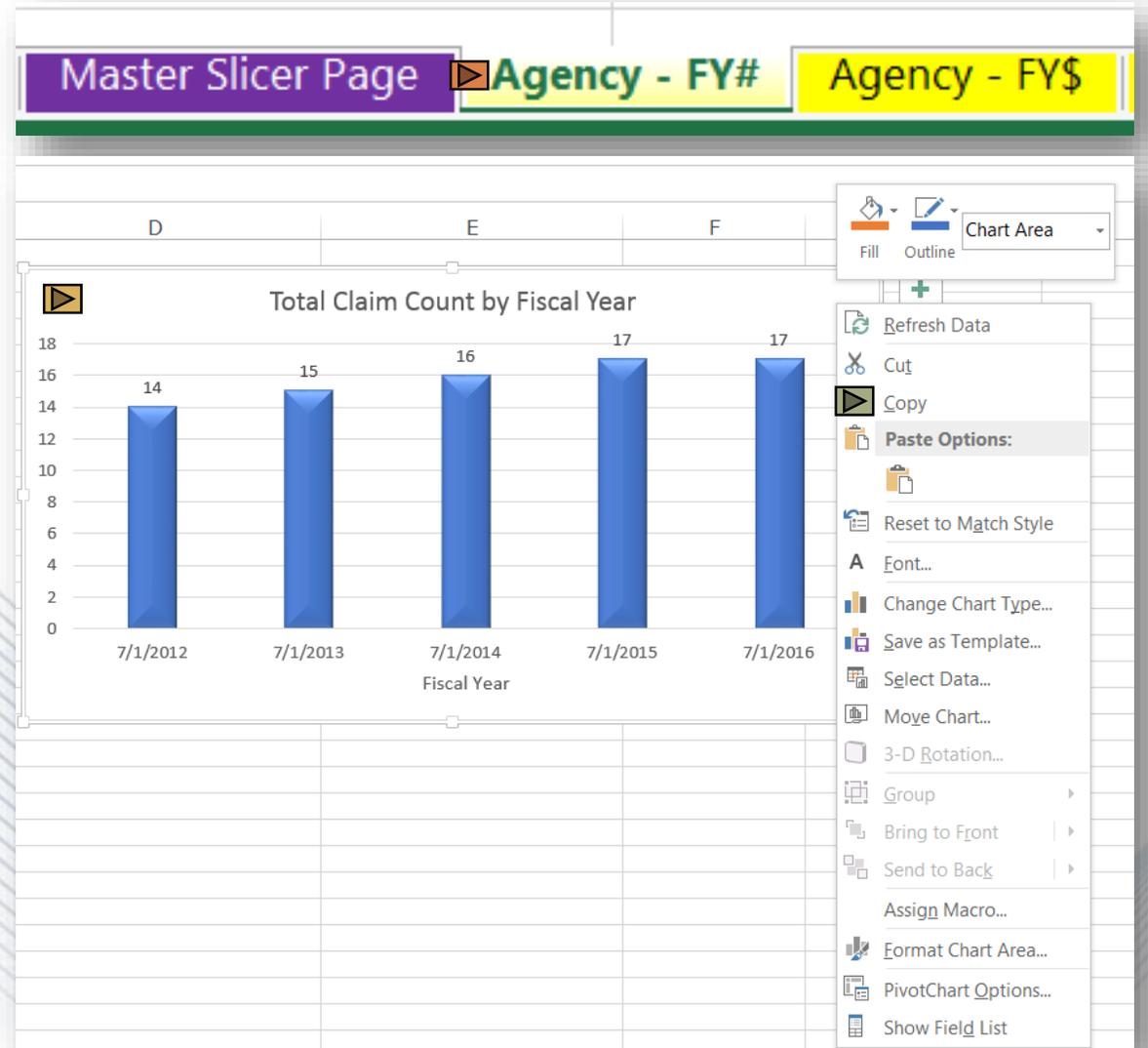


Chart connection

- *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

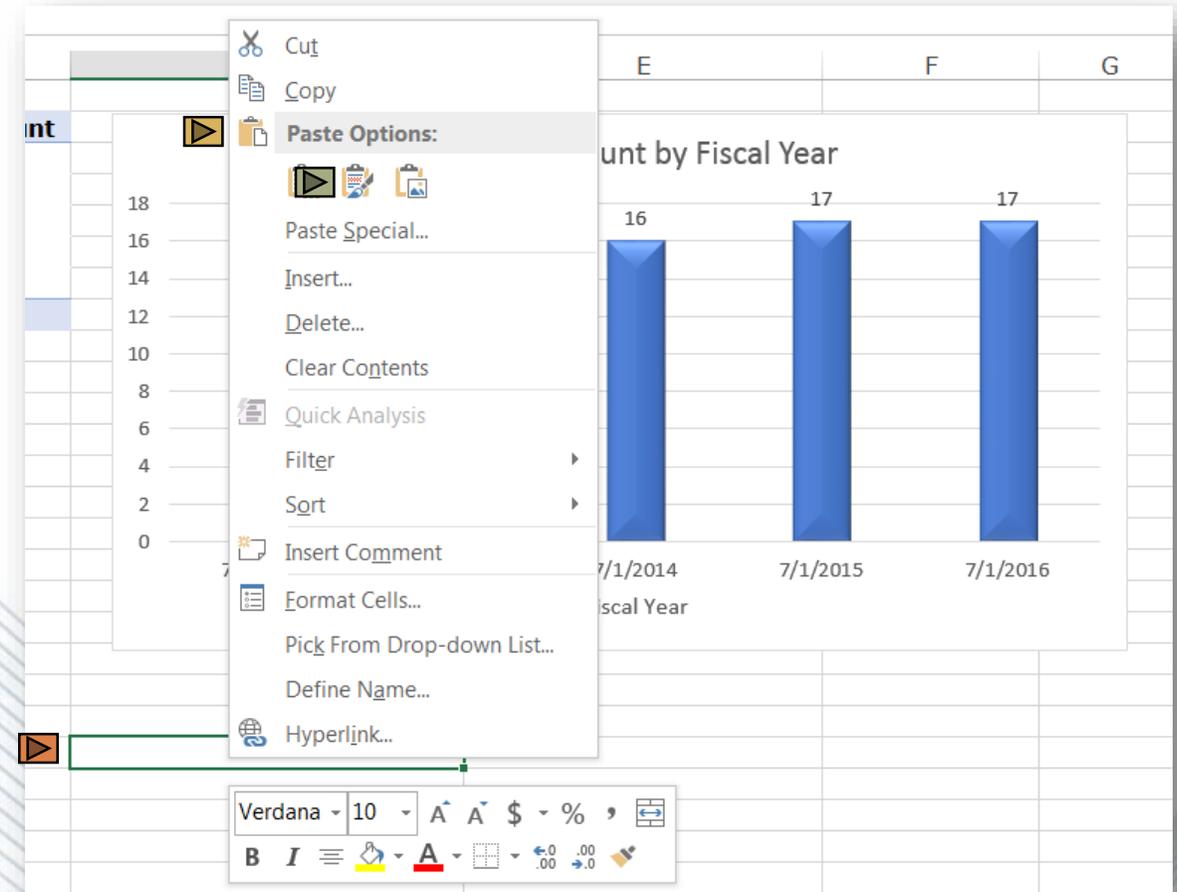


Chart color correction

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 

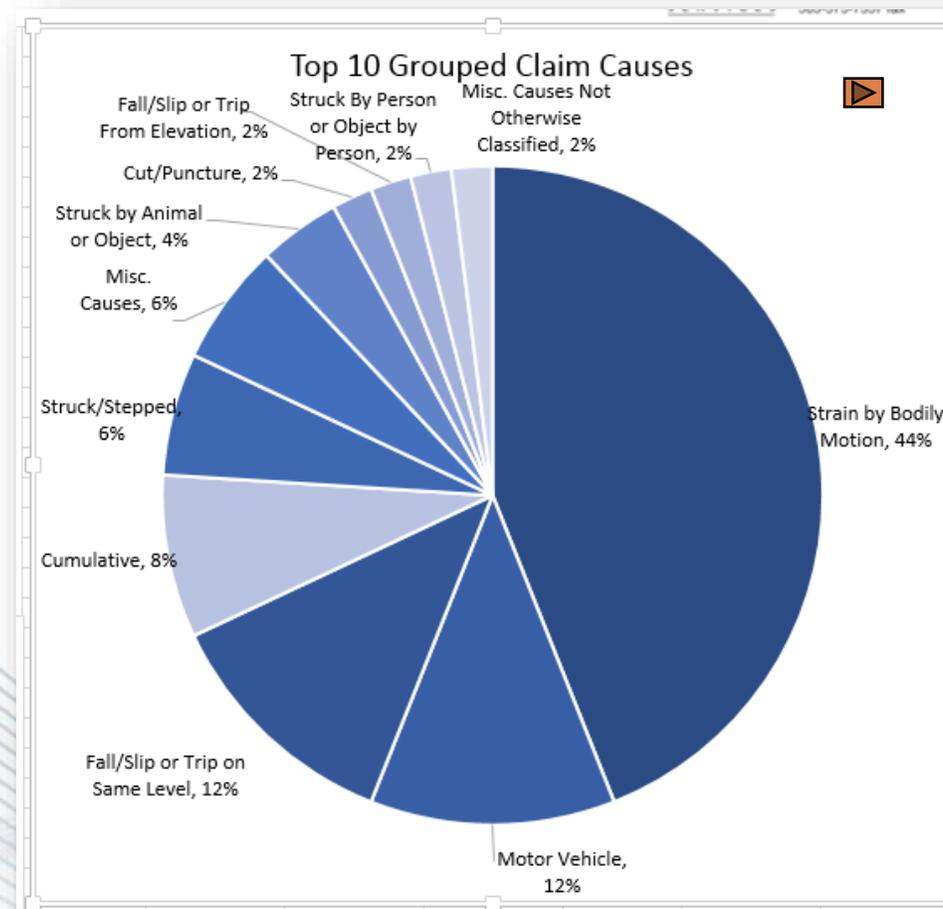


Chart color correction

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

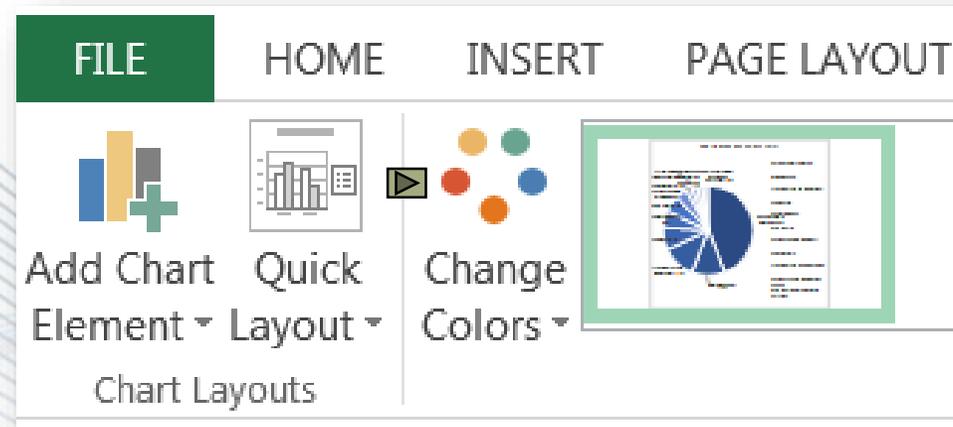
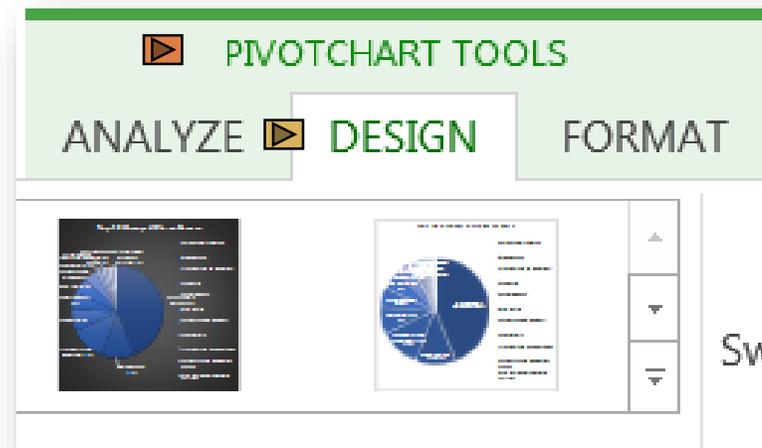
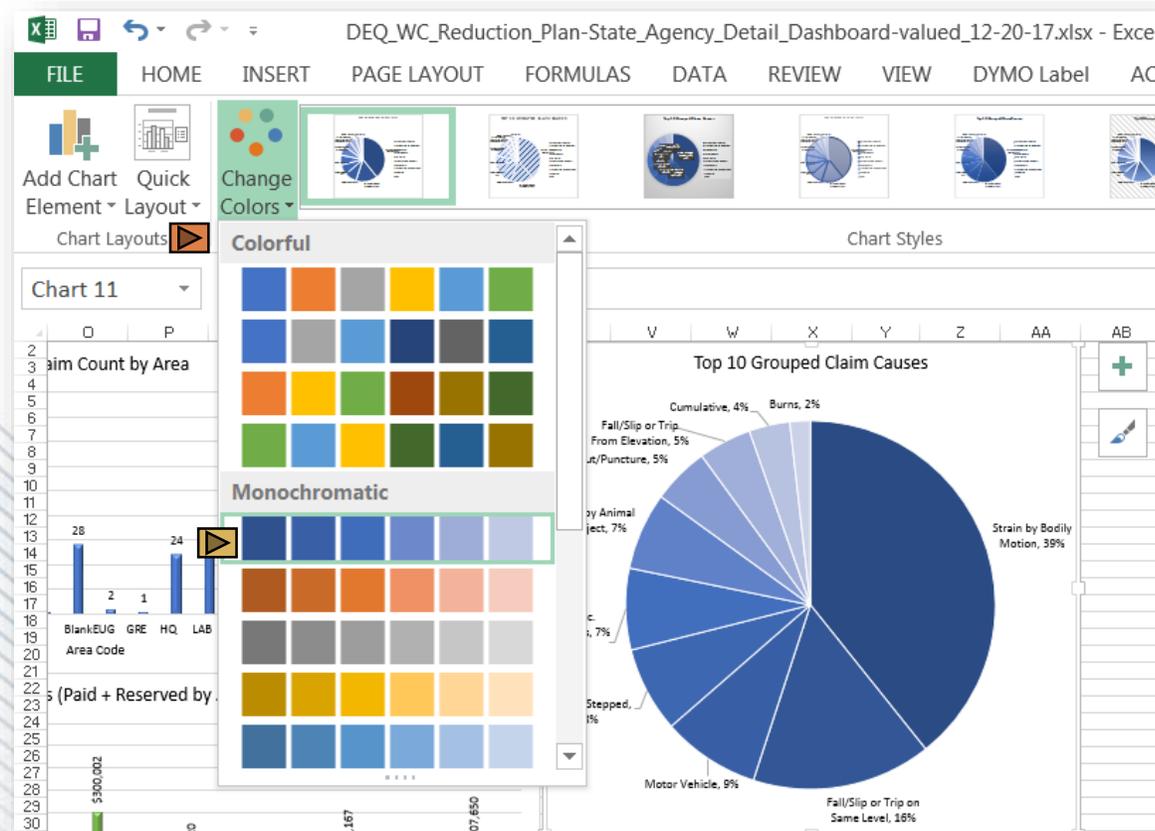


Chart color correction

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				
Claim Type	Claim Count	Average Claim Costs (Paid + Reserved)	Average Time Loss Costs (Paid + Reserved)	Average Time Loss Days
Disabling	85	\$10,169	\$1,726	24
Fatal	1	\$590,681	\$0	0
Nondisabling	375	\$935	\$0	0
PPD	37	\$40,745	\$5,332	91
Grand Total	498	\$6,653	\$691	11

Top 10 Most Costly Claims			
Injury Description	Rank Order	Total Claim Costs (Paid + Reserved)	Total Time Loss Days
mva/motorcycle crash	1	\$590,681	0
moving chair, strain back	2	\$548,821	1564.5
fell down stairs, left wrist fracture	3	\$184,770	370.5
stepped off step/twisted r ankle/fell	4	\$129,009	279
mva, rear ended and strain back	5	\$108,640	0
fell walking down stairs	6	\$79,011	30
fell from chair, r shoulder injury	7	\$72,226	7
repetative motion caused r shldr	8	\$64,183	36
twist foot, hit shelf, inj right shoulde	9	\$63,692	103
pain in left wrist , carpal tunnel	10	\$63,079	256
Grand Total		\$1,904,111	2646



Linked pictures connection

- 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

Claim Types					
	Claim Type	Claim Count	Average Claim Costs (Paid + Reserved)	Average Time Loss Costs (Paid + Reserved)	Average Time Loss Days
	Disabling	85	\$10,169	\$1,726	24
	Fatal	1	\$590,681	\$0	0
	Nondisabling	375	\$935	\$0	0
	PPD	37	\$40,745	\$5,332	91
	Grand Total	498	\$6,653	\$691	11

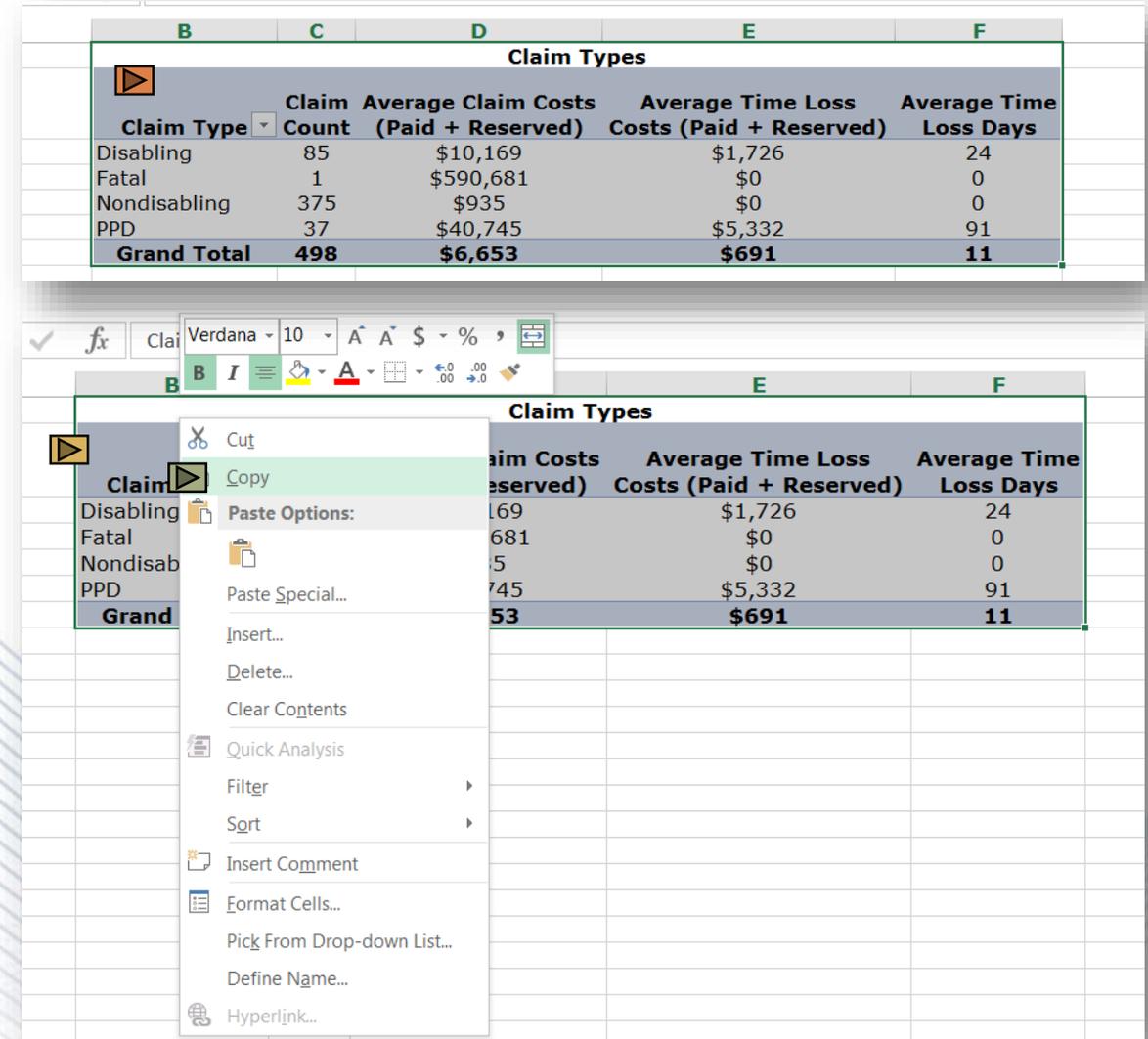
Agency - Timely#Pie	Agency - Top10\$Desc	Agency - Type#AvgTLDays
AVERAGE: 32902.684		

Claim Types					
	Claim Type	Claim Count	Average Claim Costs (Paid + Reserved)	Average Time Loss Costs (Paid + Reserved)	Average Time Loss Days
	Disabling	85	\$10,169	\$1,726	24
	Fatal	1	\$590,681	\$0	0
	Nondisabling	375	\$935	\$0	0
	PPD	37	\$40,745	\$5,332	91
	Grand Total	498	\$6,653	\$691	11



Linked pictures demo

- *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



The screenshot shows an Excel spreadsheet with a pivot table titled "Claim Types". The pivot table is located in columns B through F. The data is as follows:

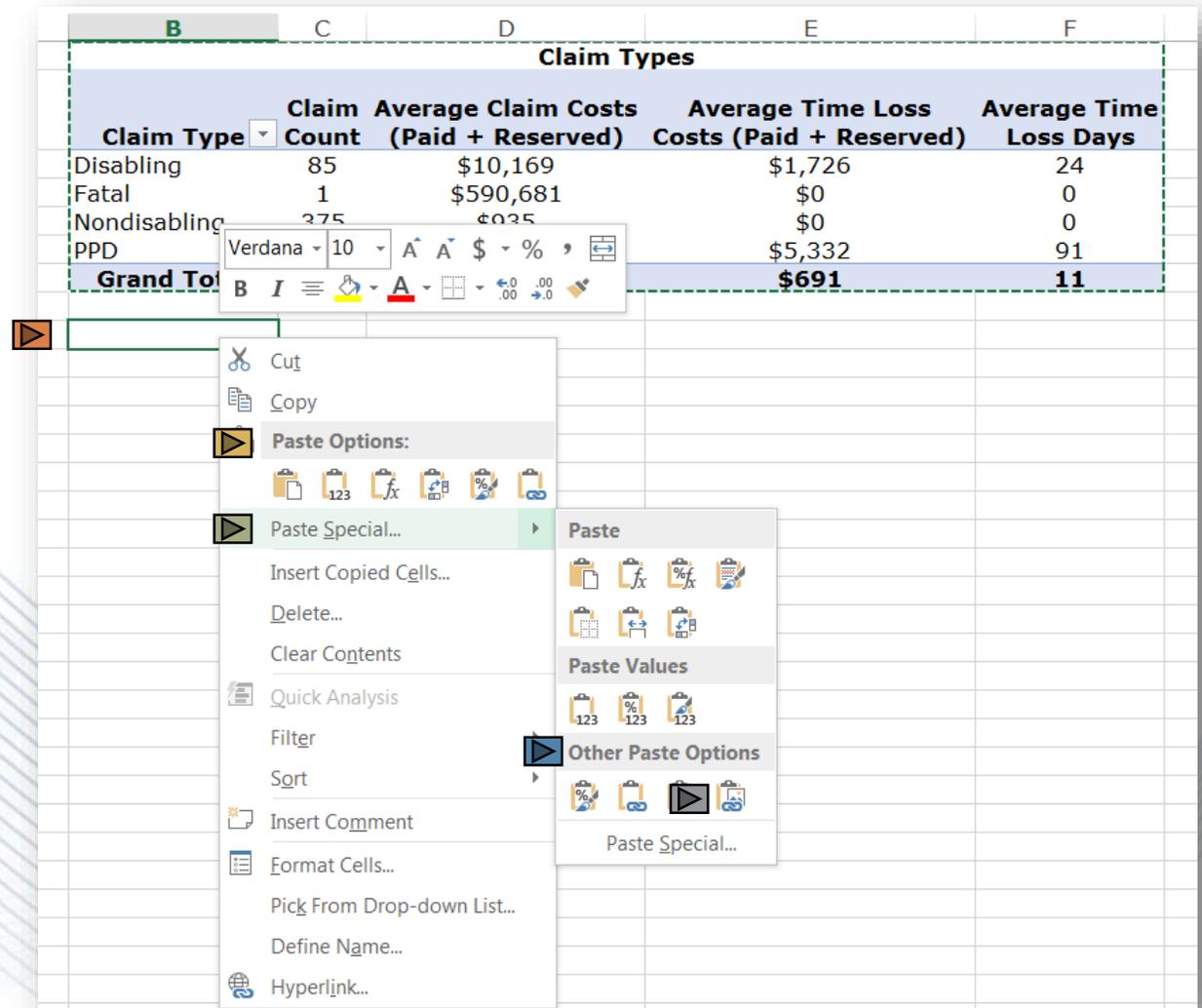
Claim Type	Count	Average Claim Costs (Paid + Reserved)	Average Time Loss Costs (Paid + Reserved)	Average Time Loss Days
Disabling	85	\$10,169	\$1,726	24
Fatal	1	\$590,681	\$0	0
Nondisabling	375	\$935	\$0	0
PPD	37	\$40,745	\$5,332	91
Grand Total	498	\$6,653	\$691	11

A context menu is open over the pivot table, showing options such as Cut, Copy, Paste Options, Paste Special..., Insert..., Delete..., Clear Contents, Quick Analysis, Filter, Sort, Insert Comment, Format Cells..., Pick From Drop-down List..., Define Name..., and Hyperlink... The "Copy" option is highlighted.



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



Claim Types				
Claim Type	Claim Count	Average Claim Costs (Paid + Reserved)	Average Time Loss Costs (Paid + Reserved)	Average Time Loss Days
Disabling	85	\$10,169	\$1,726	24
Fatal	1	\$590,681	\$0	0
Nondisabling	275	\$025	\$0	0
PPD			\$5,332	91
Grand Total			\$691	11



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

Notes and questions



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 Tips

Module 9



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

Injured Worker Age		
Age	Total Claim Count	Average Claim Costs (Paid + Reserved)
<21	4	\$65
21-29	26	\$4,025
30-39	61	\$5,183
40-49	72	\$5,011
50-59	99	\$9,646
60-69	24	\$10,192
70>	1	\$3,323
Not Recorded	1	\$3,670
Grand Total	288	\$6,904



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

Body Part	Body Parts Injured	
	Total Claim Count	Average Claim Costs (Paid + Reserved)
Abdomen	7	\$3,368
Ankle	15	\$726
Arm, Lower	7	\$1,496
Arm, Upper	5	\$11,283
Artificial Appliance	1	\$344
Back, Lower	80	\$4,034
Back, Upper	13	\$425
Back, Upper 	1	\$1,307
Body System	3	\$1,371
Brain	3	\$1,233
Buttocks	1	\$574
Chest	14	\$1,124
Ear, Internal	2	\$2,343
Elbow	15	\$11,846
Eye(s)	20	\$114



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

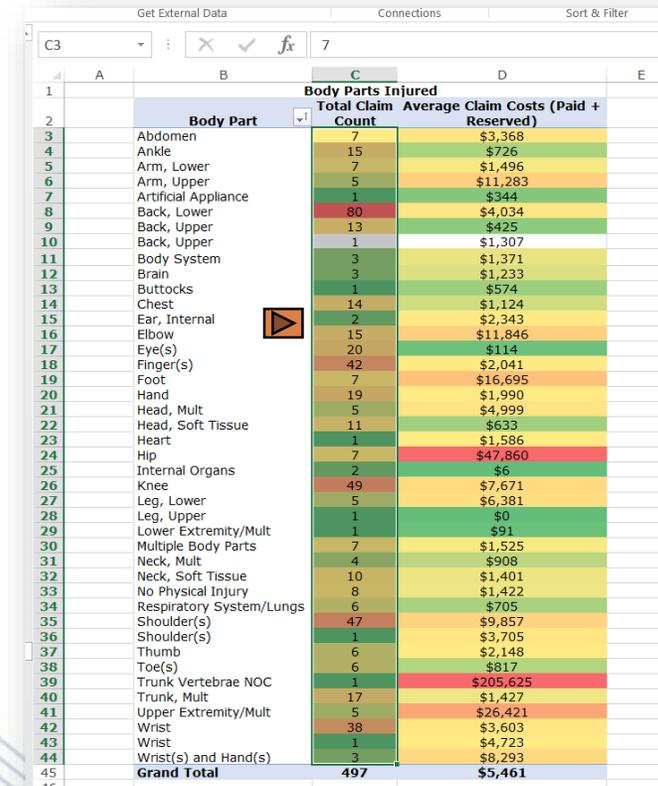
Body Parts Injured			
Body Part	Total Claim Count	Average Claim Costs (Paid + Reserved)	
Abdomen	7	\$3,368	
Ankle	15	\$726	
Arm, Lower	7	\$1,496	
Arm, Upper	5	\$11,283	
Artificial Appliance	1	\$344	
Back, Lower	80	\$4,034	
Back, Upper	13	\$425	
Back, Upper	1	\$1,307	
Body System	3	\$1,371	
Brain	3	\$1,233	
Buttocks	1	\$574	
Chest	14	\$1,124	
Ear, Internal	2	\$2,343	
Elbow	15	\$11,846	
Eye(s)	20	\$114	
Finger(s)	42	\$2,041	
Foot	7	\$16,695	
Hand	19	\$1,990	
Head, Mult	5	\$4,999	
Head, Soft Tissue	11	\$633	
Heart	1	\$1,586	
Hip	7	\$47,860	
Internal Organs	2	\$6	
Knee	49	\$7,671	
Leg, Lower	5	\$6,381	
Leg, Upper	1	\$0	
Lower Extremity/Mult	1	\$91	
Multiple Body Parts	7	\$1,525	
Neck, Mult	4	\$908	
Neck, Soft Tissue	10	\$1,401	
No Physical Injury	8	\$1,422	
Respiratory System/Lungs	6	\$705	
Shoulder(s)	47	\$9,857	
Shoulder(s)	1	\$3,705	
Thumb	6	\$2,148	
Toe(s)	6	\$817	
Trunk Vertebrae NOC	1	\$205,625	
Trunk, Mult	17	\$1,427	
Upper Extremity/Mult	5	\$26,421	
Wrist	38	\$3,603	
Wrist	1	\$4,723	
Wrist(s) and Hand(s)	3	\$8,293	
Grand Total	497	\$5,461	



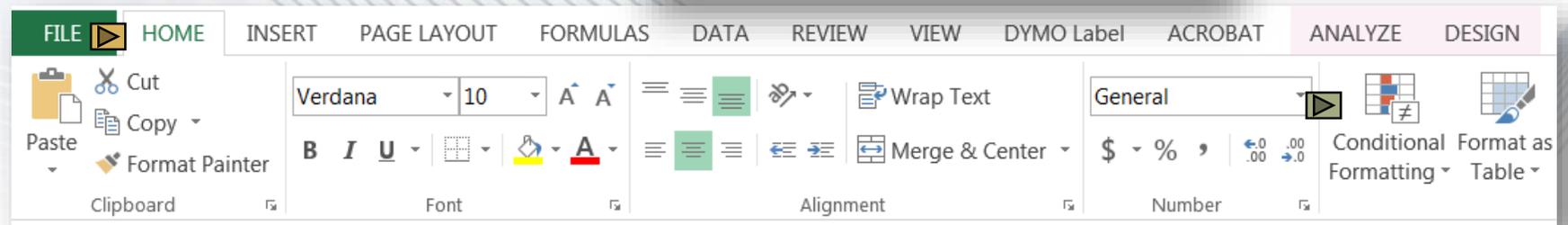
Color scaling correction

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



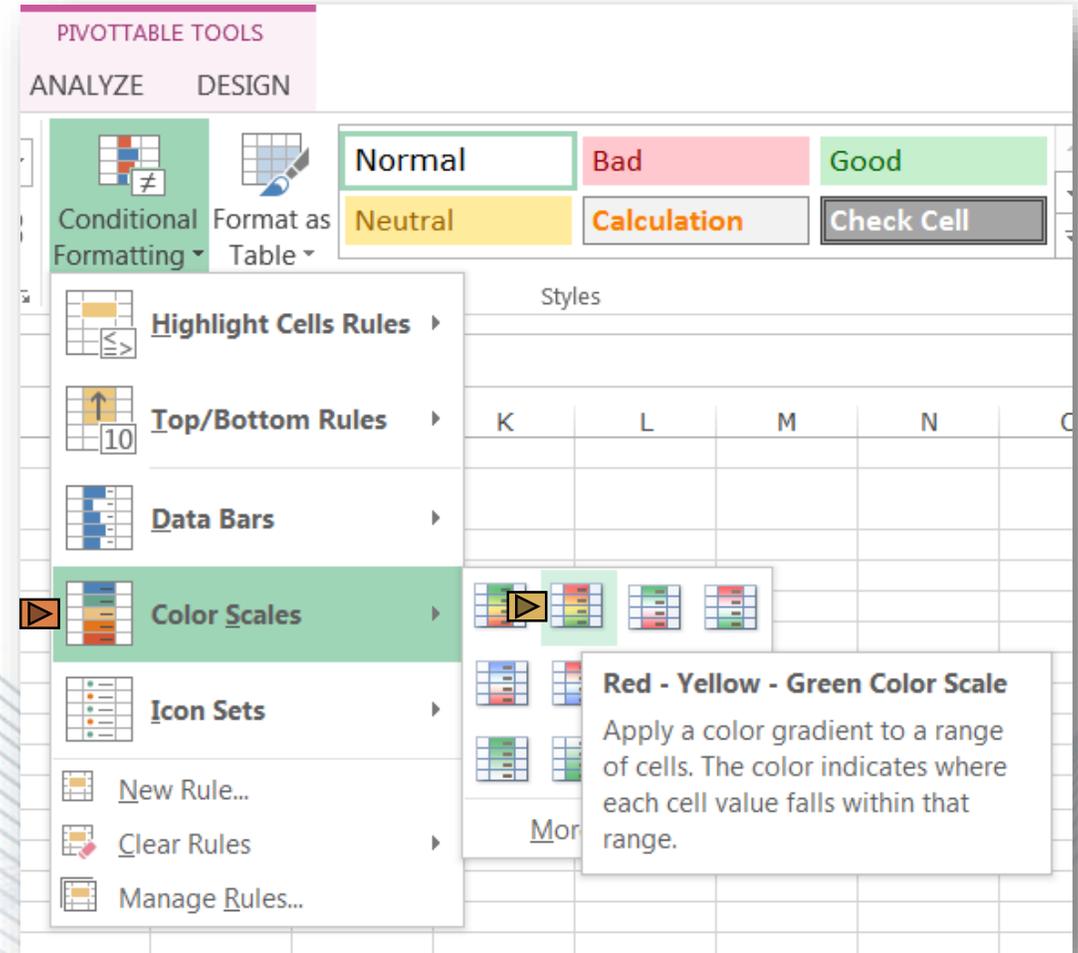
	Body Part	Body Parts Injured	Total Claim	Average Claim Costs (Paid + Reserved)
3	Abdomen	7		\$3,368
4	Ankle	15		\$726
5	Arm, Lower	7		\$1,496
6	Arm, Upper	5		\$11,283
7	Artificial Appliance	1		\$344
8	Back, Lower	80		\$4,034
9	Back, Upper	13		\$425
10	Back, Upper	1		\$1,307
11	Body System	3		\$1,371
12	Brain	3		\$1,233
13	Buttocks	1		\$574
14	Chest	14		\$1,124
15	Ear, Internal	2		\$2,343
16	Elbow	15		\$11,846
17	Eye(s)	20		\$114
18	Finger(s)	42		\$2,041
19	Foot	7		\$16,695
20	Hand	19		\$1,990
21	Head, Mult	5		\$4,999
22	Head, Soft Tissue	11		\$633
23	Heart	1		\$1,586
24	Hip	7		\$47,860
25	Internal Organs	2		\$6
26	Knee	49		\$7,671
27	Leg, Lower	5		\$6,381
28	Leg, Upper	1		\$0
29	Lower Extremity/Mult	1		\$91
30	Multiple Body Parts	7		\$1,525
31	Neck, Mult	4		\$908
32	Neck, Soft Tissue	10		\$1,401
33	No Physical Injury	8		\$1,422
34	Respiratory System/Lungs	6		\$705
35	Shoulder(s)	47		\$9,857
36	Shoulder(s)	1		\$3,705
37	Thumb	6		\$2,148
38	Toe(s)	6		\$817
39	Trunk Vertebrae NOC	1		\$205,625
40	Trunk, Mult	17		\$1,427
41	Upper Extremity/Mult	5		\$26,421
42	Wrist	38		\$3,603
43	Wrist	1		\$4,723
44	Wrist(s) and Hand(s)	3		\$8,293
45	Grand Total	497		\$5,461



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





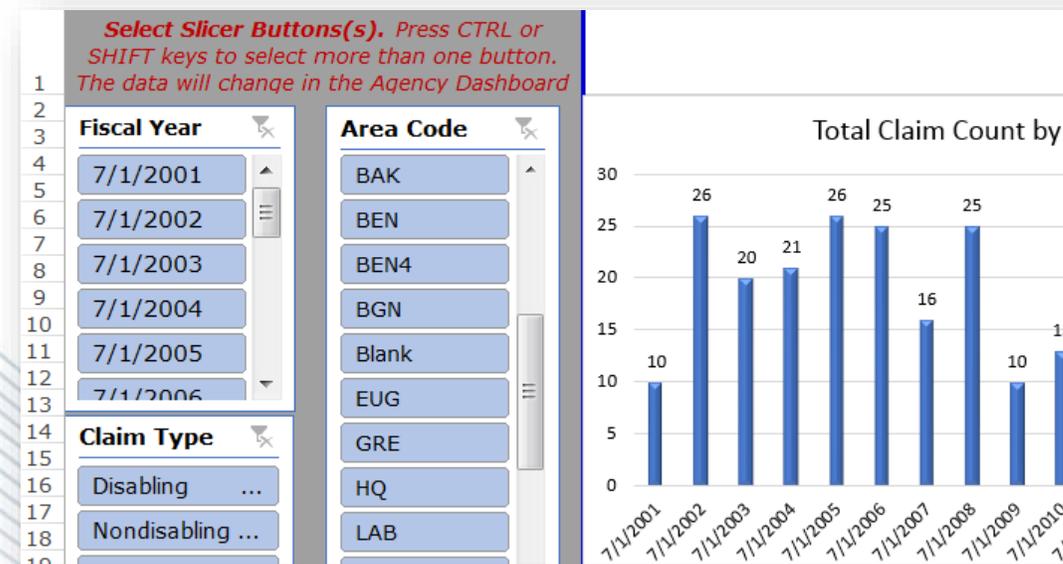
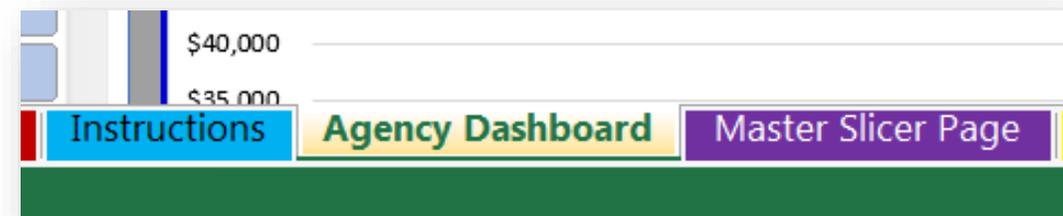
Slicers Tips

Module 10



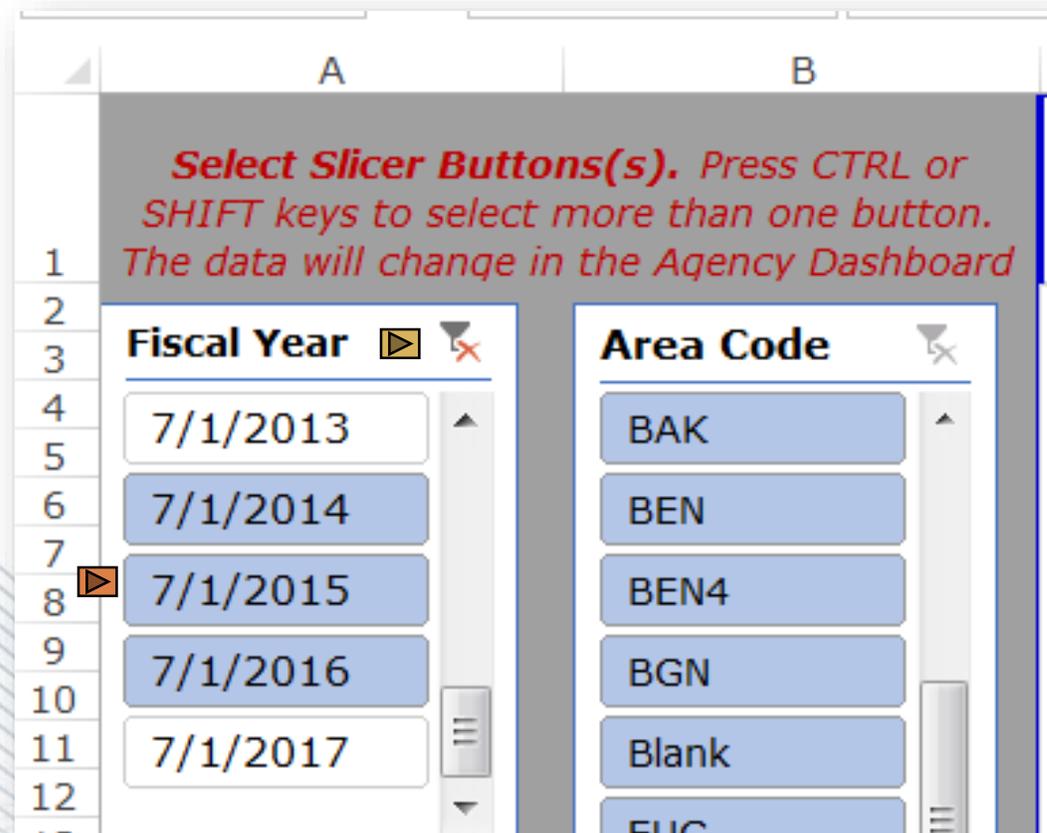
Slicers overview

- 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](#)





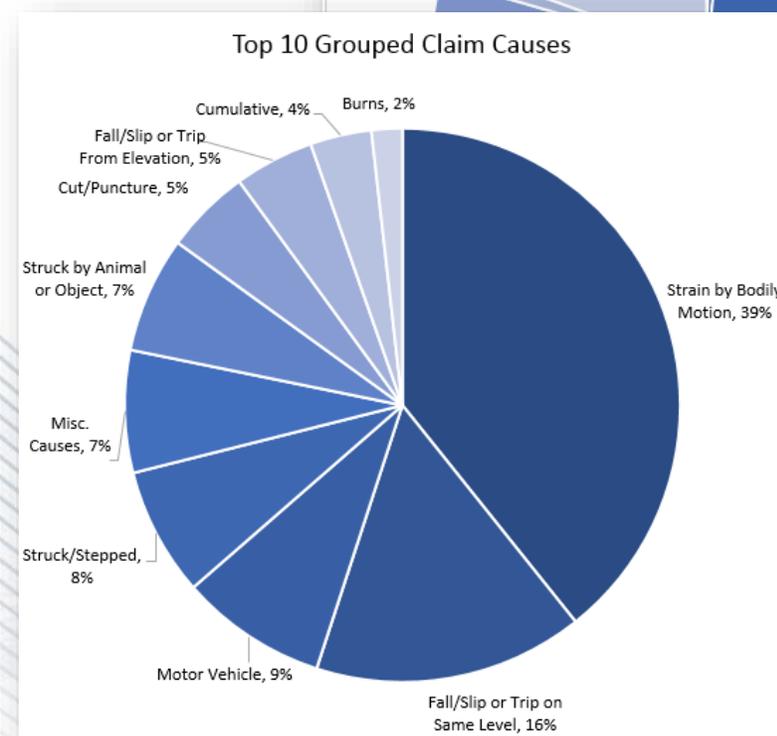
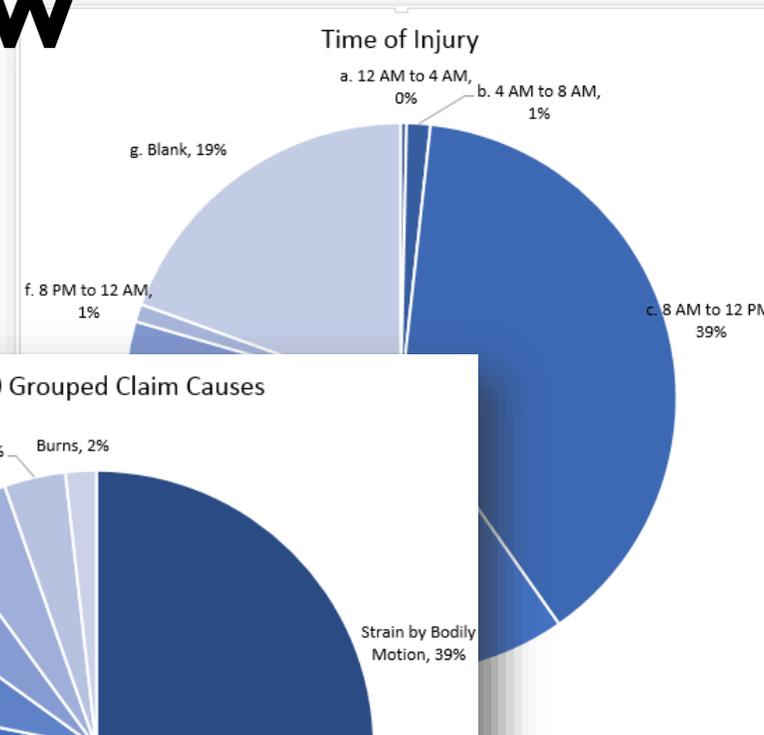
Field Grouping Tips

Module 11



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	Total Claim Count	Average Claim Costs (Paid + Reserved)
Burns	5	\$426
Caught In/Under	3	\$294
Cumulative	10	\$7,425
Cut/Puncture	14	\$280
Fall/Slip or Trip From Elevation	13	\$4,263
Fall/Slip or Trip on Same Level	44	\$7,718
Misc. Causes	20	\$10,149
Misc. Causes Not Otherwise Classified	3	\$178
Motor Vehicle	24	\$6,244
Strain by Bodily Motion	110	\$9,990
Struck by Animal or Object	19	\$1,685
Struck By Person or Object by Person	2	\$3,120
Struck/Stepped	21	\$1,034
Grand Total	288	\$6,904

Time of Injury	Total Claim Count
a. 12 AM to 4 AM	0%
b. 4 AM to 8 AM	1%
c. 8 AM to 12 PM	39%
d. 12 PM to 4 PM	29%
e. 4 PM to 8 PM	10%
f. 8 PM to 12 AM	1%
g. Blank	19%
Grand Total	100%





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



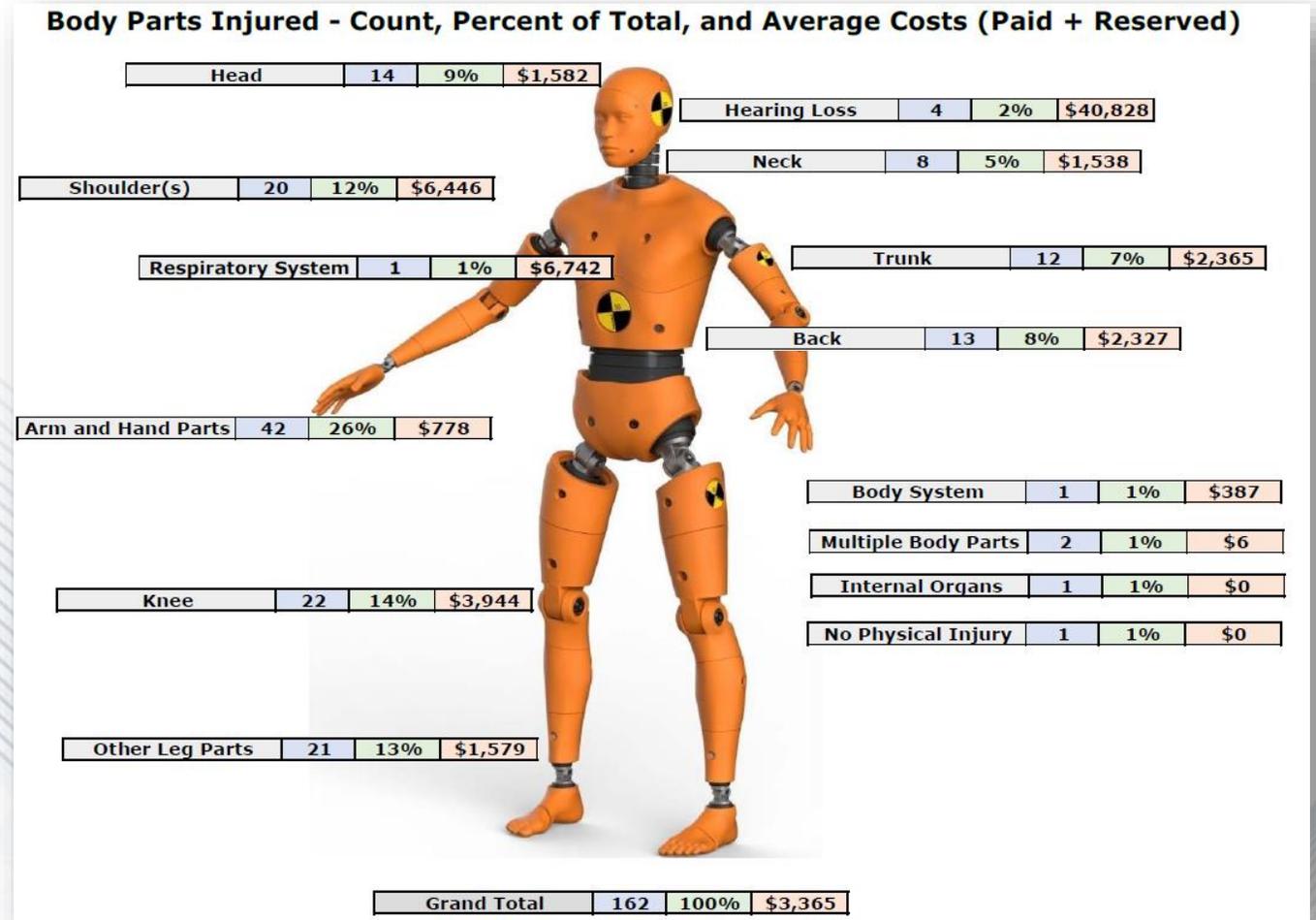
Special dashboards overview

- 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

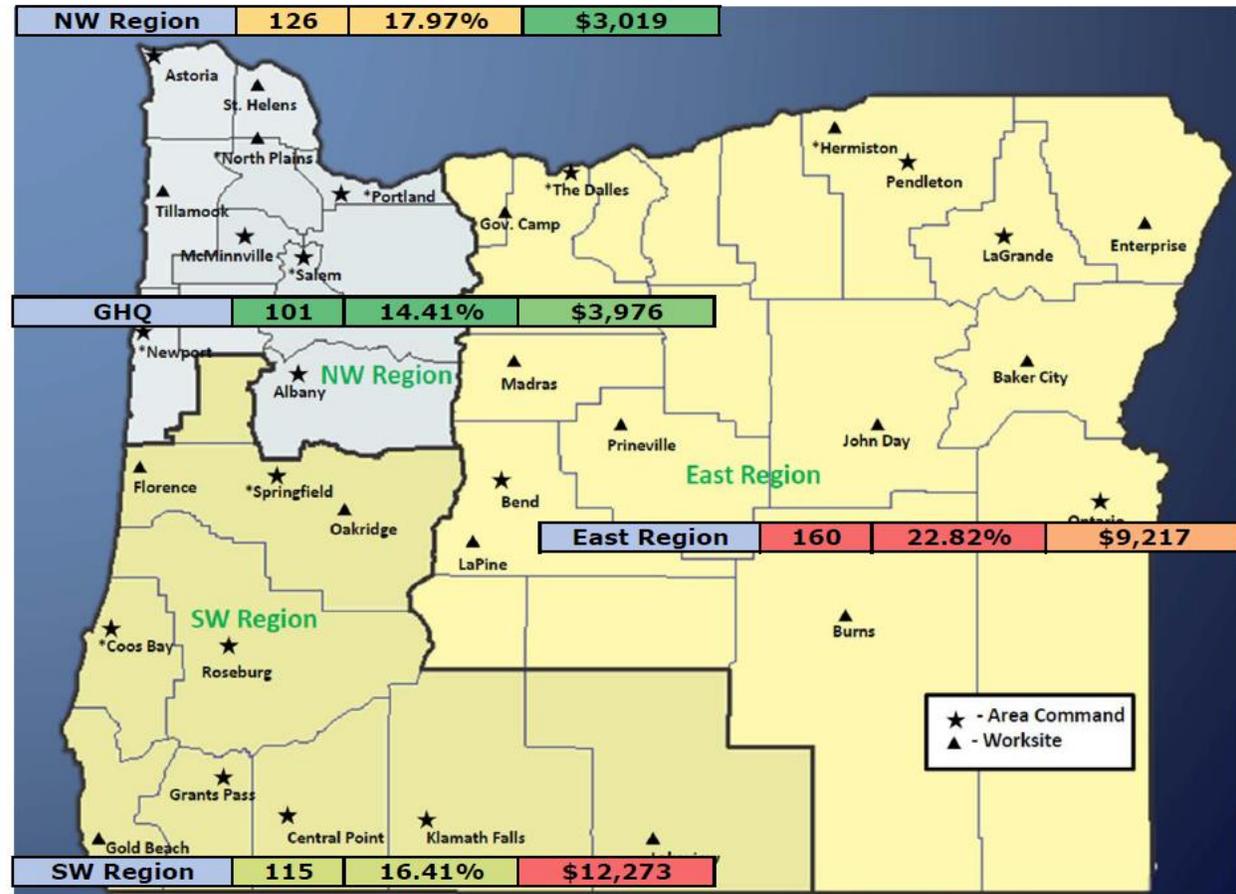
- Courtesy of Allison Hewlett, OSP Safety Officer, and Trooper Cook (model)
- Grouped by the common body parts injured



Region dashboard

- Courtesy of Allison Hewlett, OSP Safety Officer
- Grouped by the Regions

OSP Injuries by Region (Count, Percent of Total, and Average Costs) 7/1/2011 to 11/8/17





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>

