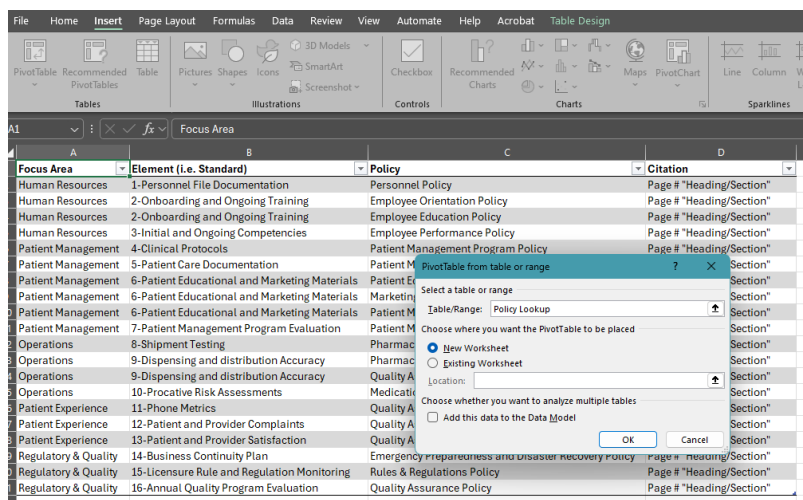


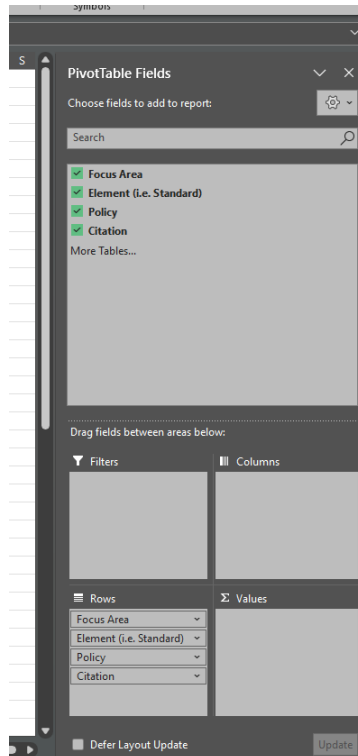
ASHP Crosswalk Template Tool Instructions:

1. To begin organizing policies using this template, create (at minimum) four columns:
 - a. Focus area for standards of Accrediting Organization (AO)
 - b. Accreditation Standard
 - c. Policy Title
 - d. Policy Citation (i.e., "Page # 'Heading/Section'")
2. If you plan to use one spreadsheet to track accreditation standards across multiple AO's (i.e., URAC, ACHC, The Joint Commission, etc.), you may want to add a fifth column to identify which parent AO is associated with the standard being cited in policy.
 - a. For creating the master data table, the order of columns will not affect how the data is summarized in the pivot tables later.
3. It is important to note that each row of the table will represent a specific policy citation to a corresponding standard. This means you will have multiple lines with the same policy title if the same policy is used to cover multiple accreditation standards.
4. Enter data consistently throughout your policy/standard crosswalk review.
5. Once your master data table is complete, it is time to create your pivot tables to allow you to easily look up policies by accreditation standard and vice versa:
 - a. Select all the data from your master table.
 - i. If you have formatted the data in a table using the Excel "Format as Table" button, you just need to have a cell in the table selected before creating the pivot table.
 - b. With data selected, navigate to the "Insert" tab.
 - i. Click "Pivot Table"
 1. Name this table "Policy Lookup"
 2. Place the pivot table on a new sheet (default option)
 3. Click "OK"



ASHP Crosswalk Template Tool Instructions:

- c. You should be able to see your pivot table in a new sheet, click anywhere inside the new table (no data should be visible at this point).
 - i. On the right side of your screen, a format pane should be visible and read “PivotTable Fields”
 1. You will see the headers of your master table listed in the top box and four quadrants below titled “Filters,” “Columns,” “Rows,” and “Values.”



2. Click and drag the following headers to the “Rows” quadrant in the order below (top to bottom):
 - a. Focus Area (TOP)
 - b. Accreditation Standard
 - c. Policy Title
 - d. Policy Citation (BOTTOM)
- ii. At this point your pivot table is ready to use and will organize your data in drop-down menus:
 1. Focus Area
 - a. Standard
 - i. Policy Title
 1. Citation

ASHP Crosswalk Template Tool Instructions:

Example:

2	
3	Policy Lookup
4	Human Resources
5	1-Personnel File Documentation
6	Personnel Policy
7	Page # "Heading/Section"
8	2-Onboarding and Ongoing Training
9	Employee Education Policy
10	Page # "Heading/Section"
11	Employee Orientation Policy
12	Page # "Heading/Section"
13	3-Initial and Ongoing Competencies
14	Employee Performance Policy
15	Page # "Heading/Section"
16	Operations
17	10-Proactive Risk Assessments
18	Medication/Product Risk Assessment Policy
19	Page # "Heading/Section"

- d. To create your next pivot table, return to your master table and repeat steps 5a-5b above.
 - i. Name this table "Standard Lookup" and place it in a new sheet.
 1. This time, drag the headers to the "Rows" quadrant in the following order (top to bottom):
 - a. Policy Title (TOP)
 - b. Focus Area
 - c. Accreditation Standard (BOTTOM)
 - ii. At this point your pivot table is ready to use and will organize your data in drop-down menus:
 1. Policy Title
 - a. Focus Area
 - i. Standard

This can be a useful way of using Excel PivotTables to look up what policies apply to a particular accreditation standard within your organization. It can also be helpful to quickly see what accreditation standards are covered by a particular policy. If kept up to date, this tool can improve efficiency when responding to desktop surveys.

This resource was created by the Accreditation and Compliance Section Advisory Group of the Section of Specialty Pharmacy Practitioners, and is intended for informational use only. Please review the full disclaimer on ASHP's website for important information regarding its purpose and limitations.