

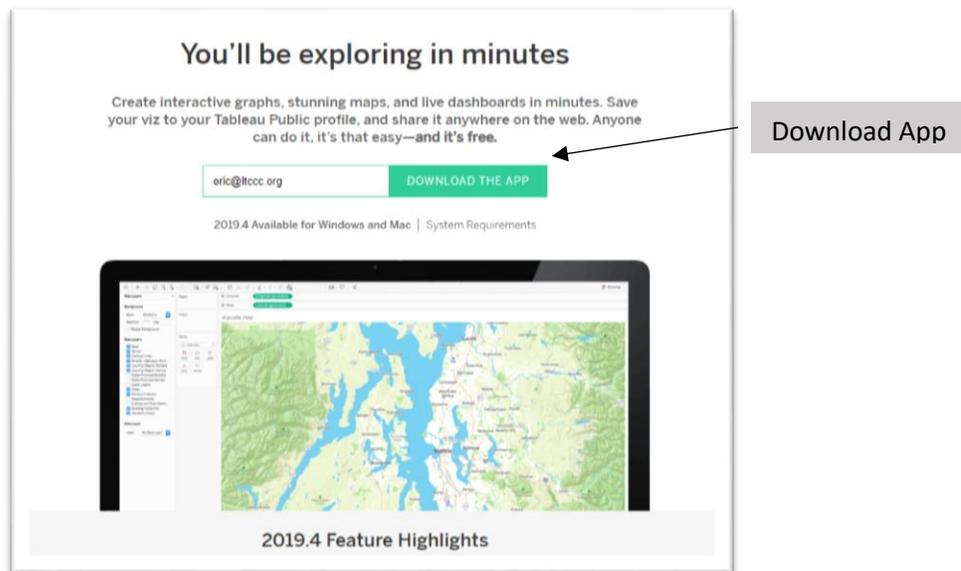
# LONG TERM CARE COMMUNITY COALITION

*Advancing Quality, Dignity & Justice*

## INSTRUCTIONS: USING TABLEAU\* TO MAP INFORMATION ON NURSING HOMES IN YOUR STATE

### Downloading Tableau†

1. Visit <https://public.tableau.com/en-us/s/download>.
2. Enter your email address.
3. Select “**DOWNLOAD THE APP.**”



4. After the file has been downloaded, select “Run” and follow the prompts to install Tableau on your Mac or Windows computer.
  - On Windows, the Tableau Public shortcut should be visible on your desktop. Double click it to open.

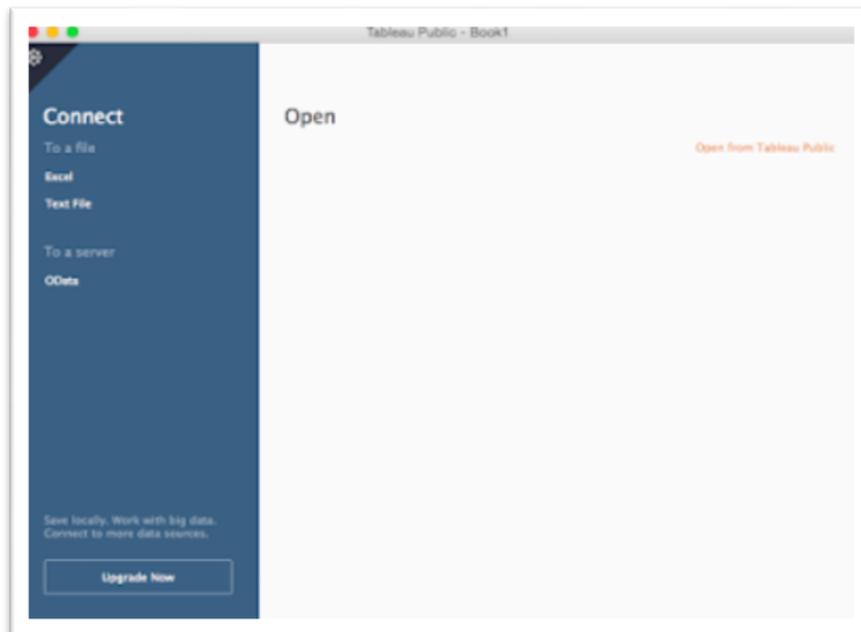


Tableau icon

\* Note: A Tableau-friendly nursing home dataset and other information is available at <https://nursinghome411.org/tableau-friendly-nursing-home-compare-dataset/>.

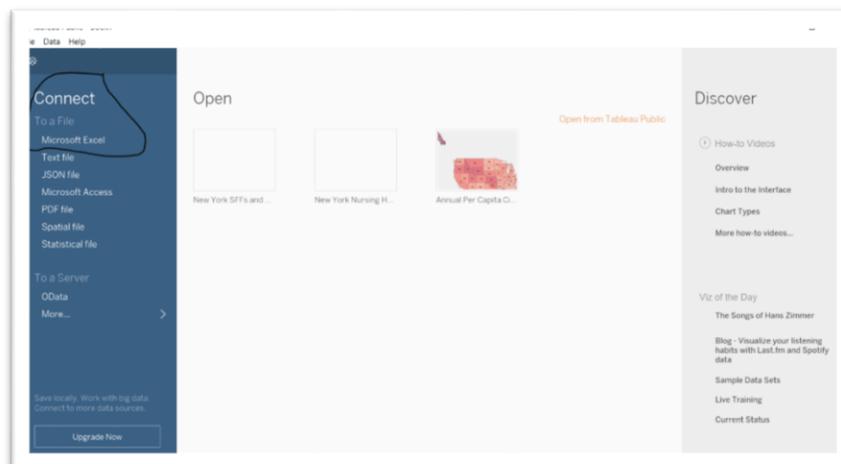
† Tableau download instructions by [chadskelton.com/p/installing-tableau-public-and-open.html](https://chadskelton.com/p/installing-tableau-public-and-open.html)

- On a Mac, you may have to search for Tableau by double clicking the search icon in the top right and typing in 'tableau.'
- Drag the program into your dock and double-click the icon to load Tableau Public. **Your screen should look like this:**

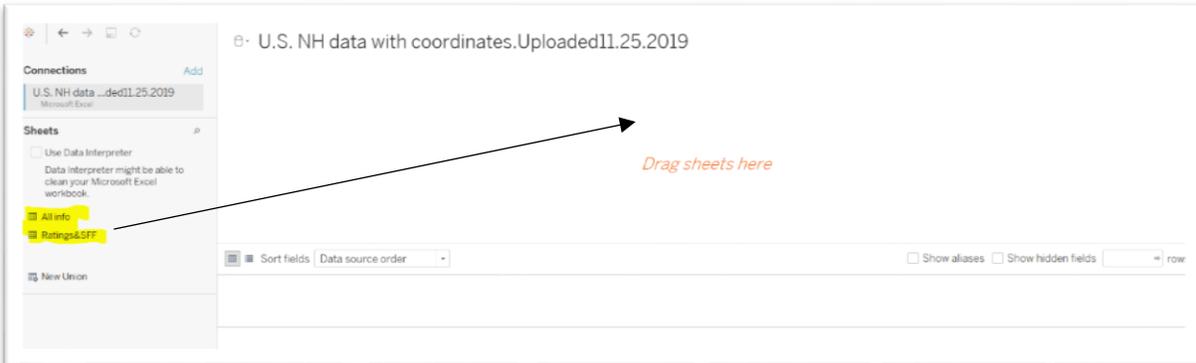


## Getting Started

1. Open Tableau Public.
2. Select **Microsoft Excel** on top left to add file(s).
3. Select file titled **“US.NHdatawithcoordinates.xlsx”** (or other file of interest).
  - Note: File is available at <https://nursinghome411.org/tableau-friendly-nursing-home-compare-dataset/>.



4. Excel files should include latitude, longitude, and variables of interest (i.e., Overall rating, Provider name, etc.). Note: Excel files should be checked for errors, missing data points, outliers, etc.
  - If the excel file contains multiple sheets, drag sheet(s) of interest into the area labeled “**Drag sheets here.**”
  - In this example, we will drag “**Ratings&SFF**” to “**Drag sheets here**” area.



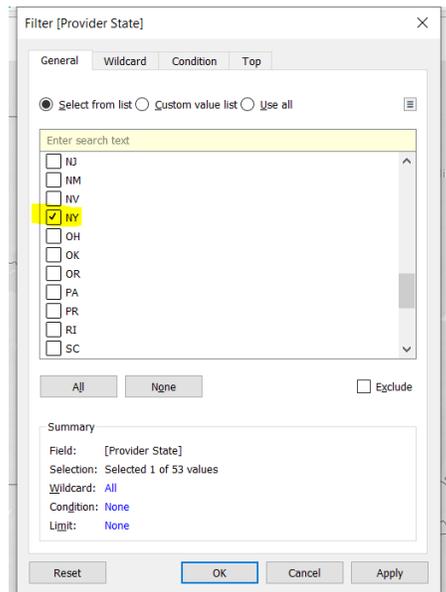
- Click **Sheet 1** at the bottom left, then right click **Sheet 1** to rename (i.e., New York Nursing Home Ratings).

Provider Name	Federal Provid...	Latitu
15 CRAIGSIDE	125,063.00000	2
60 WEST	75,442.00000	4
A GRACE SUB AC.	56,376.00000	3
A HOLLY PATTER.	335,023.00000	4
A MERKLE C KNIP.	146,085.00000	4
A G RHODES HO.	115,002.00000	3
A G RHODES HO.	115,521.00000	3
A G RHODES HO.	115,275.00000	3
AARON MANOR ...	75,410.00000	4
AARON MANOR ...	335,532.00000	4
AACE WILGEM U.	168,170.00000	4

Select **Sheet 1**, then right click Sheet 1 to rename

## Creating Data Points

1. On the left column, there are two sections: 1) **Dimensions** and 2) **Measures**.
2. Under Dimensions, select **Provider State** and drag into **Filters** shelf. Select state(s) of interest.

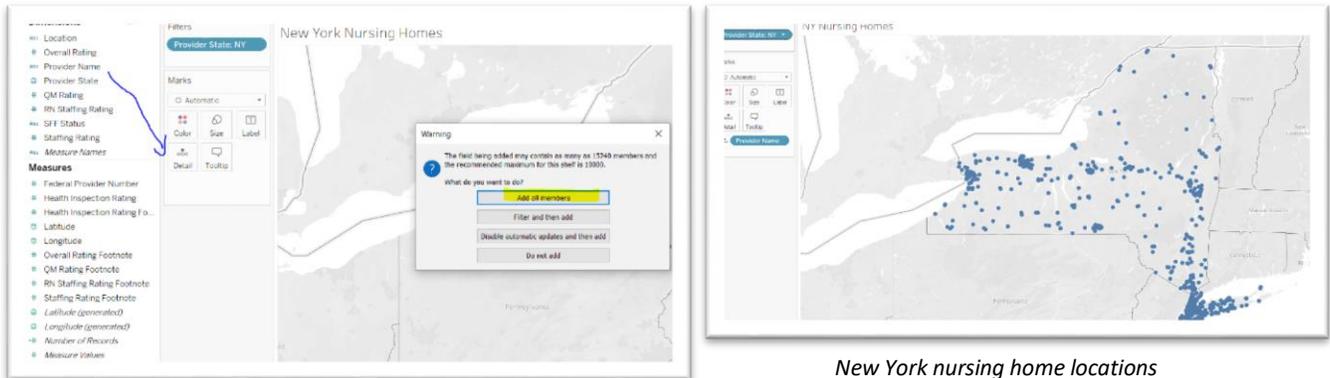


Filtered by state (NY)

3. Under **Measures**, find items labeled **“Latitude”** and **“Longitude.”**
  - Drag **Latitude** and **Longitude** above into **Dimensions**. (Do **NOT** use items labeled **“Latitude (generated)”** and **“Longitude (generated)”**.)
  - Double-click **Longitude** or drag to **Columns** on shelf on top of map. Double click **Latitude** or drag to **Rows** (below **Columns**).

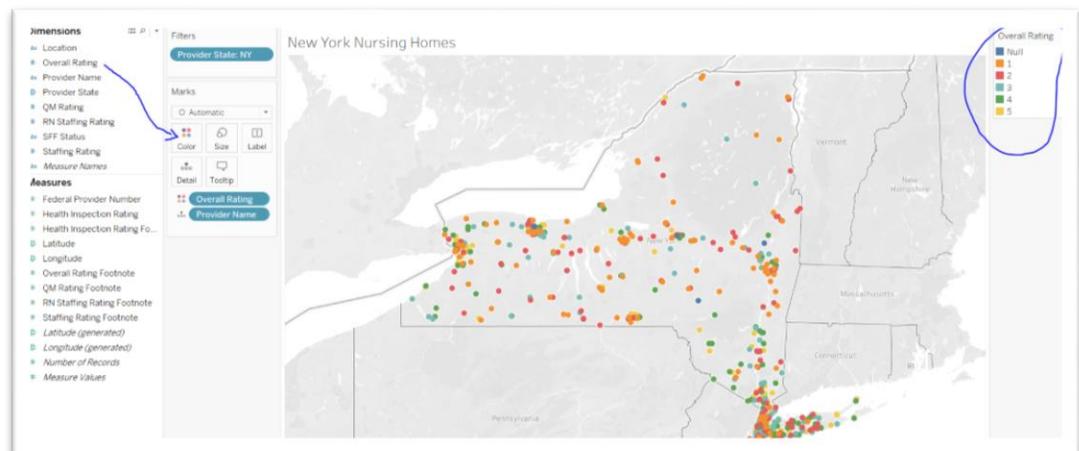
Drag Latitude and Longitude from Measures to Dimensions. Then double-click!

- Under **Dimensions**, select **Provider Name** and drag into **Detail** in the shelf labeled **Marks**.
  - The map will now display your state's nursing homes and locations.

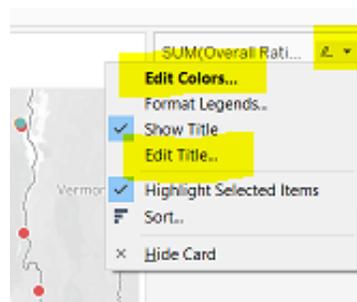


## Illustrating Overall Ratings by Color

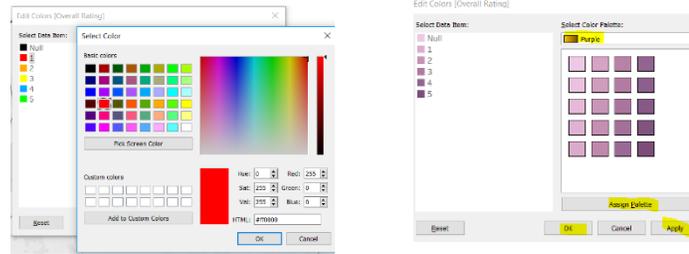
- Under **Measures** and **Dimensions**, identify variable(s) of interest: **Overall Rating**, **Health Inspection Rating**, **QM Rating**, and **Staffing Rating**.
- Drag variables of interest from **Measures** to **Dimensions**.
- To illustrate overall ratings by color, drag **Overall Rating** to **Color** (found in **Marks** shelf).



- Edit Colors and Legend title by hovering over **Overall Rating** on top right and selecting arrow, ▼.

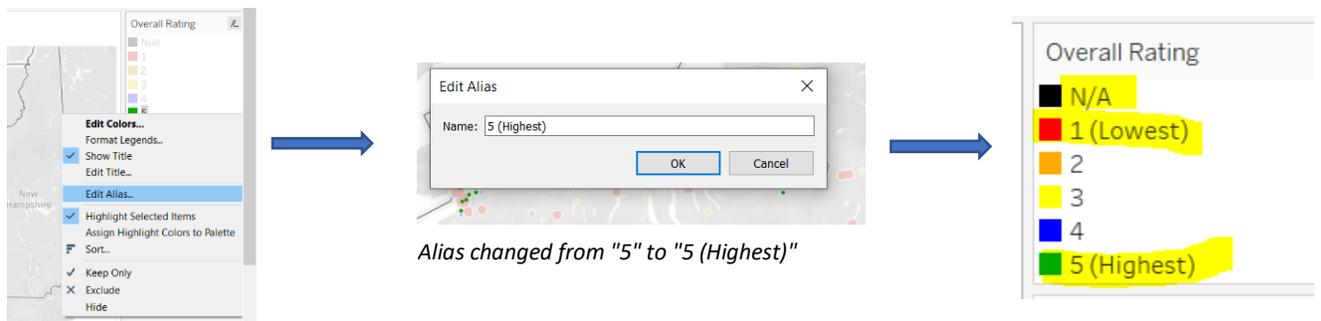


- Edit colors **manually** by assigning colors to each number or automatically assign colors by selecting Tableau's **Color Palettes**.



Manual color assignment (left) vs. Tableau color palette (right)

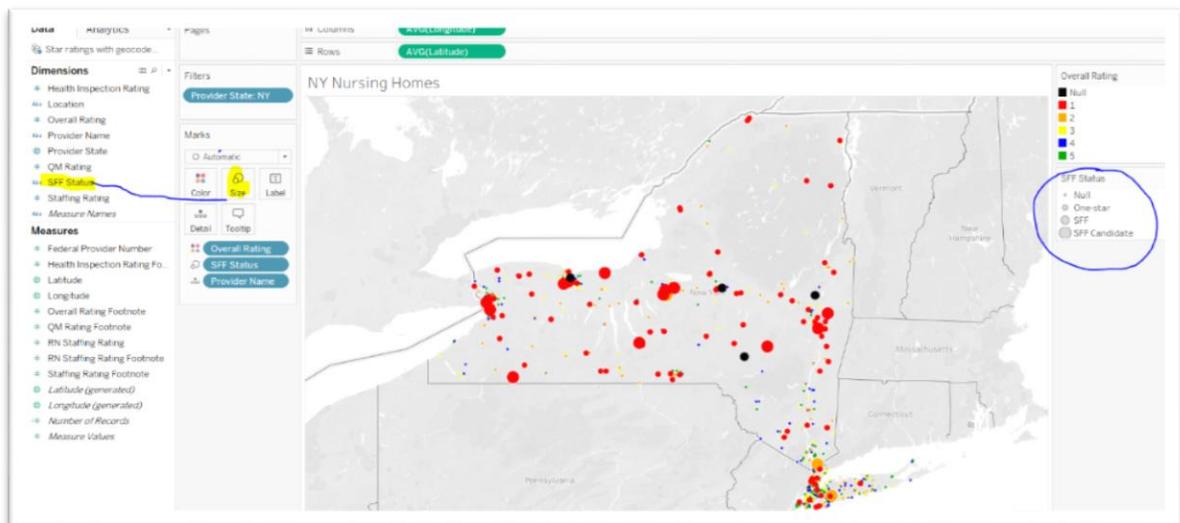
- Rename values in **Legend** by right clicking value and selecting **Edit Alias**.



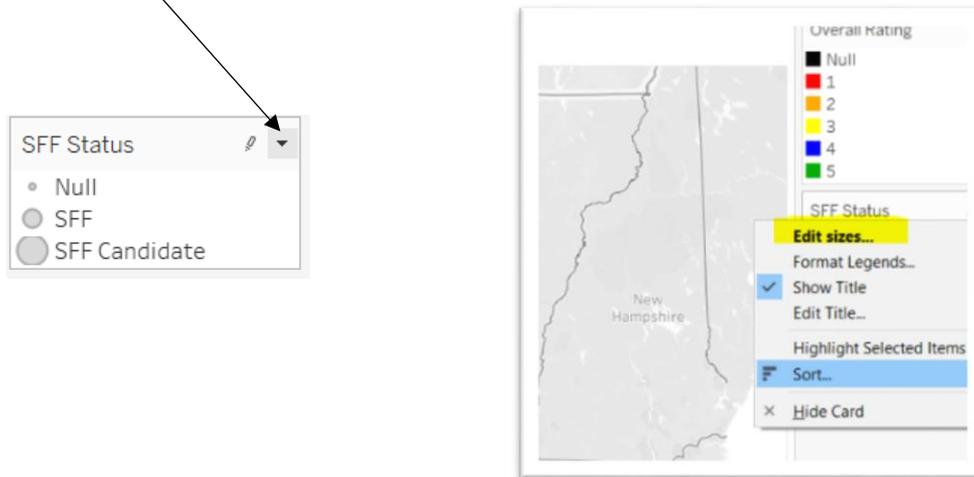
Alias changed from "5" to "5 (Highest)"

### Illustrating Special Focus Facility (SFF) Status by Size

1. Under **Dimensions** on left, drag **SFF Status** to **Size** (found in **Marks** shelf).



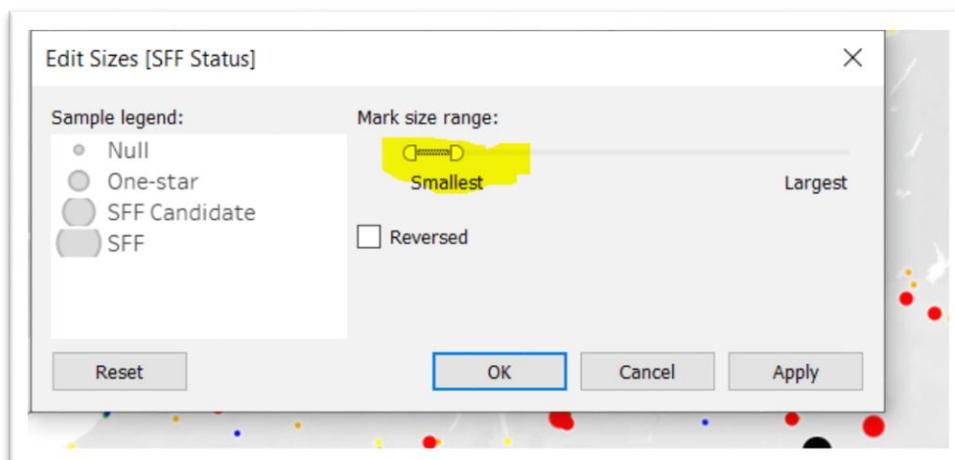
- To edit legend (title, circle size, etc.), hover over **SFF Status** on top right and select the arrow, ▼.



- To re-order Legend, select **Manual** and adjust items by preferred order.

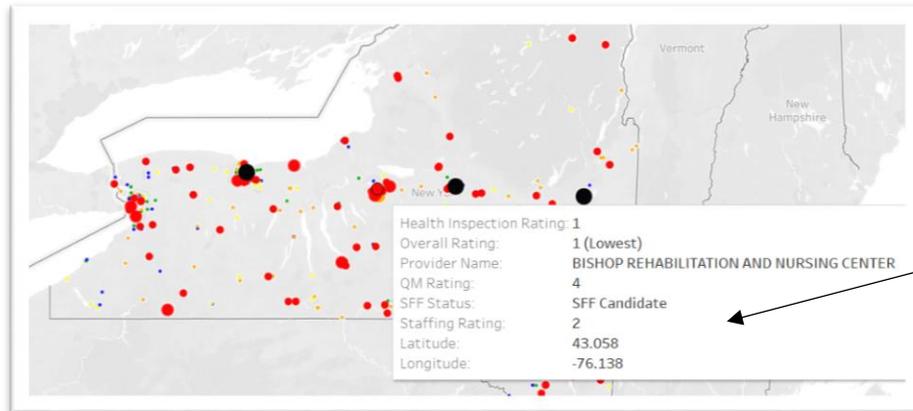


- To resize circles, select **Edit Sizes** and toggle **Mark size range**.

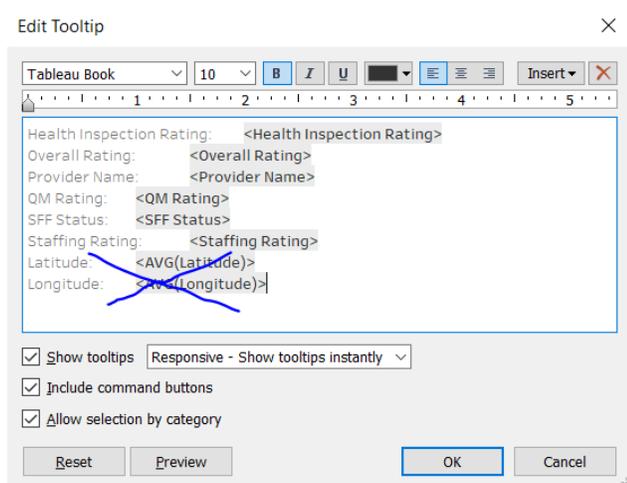


## Secondary Variables

- Under dimensions, identify secondary variables of interest (**QM Rating, Staffing Rating, and Health Inspection Rating**). Select variables and drag to **Marks** under **Details**.
  - When hovering over a nursing home, you will now see primary and secondary variables.

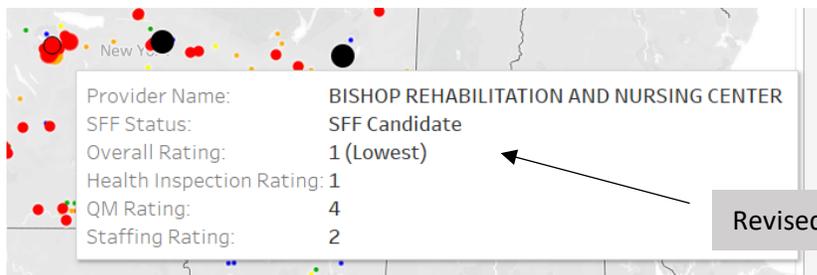


- Edit tooltip display by selecting **Tooltip** under **Marks**.



Edit Tooltip allows you to delete items, arrange order, adjust font, and more.

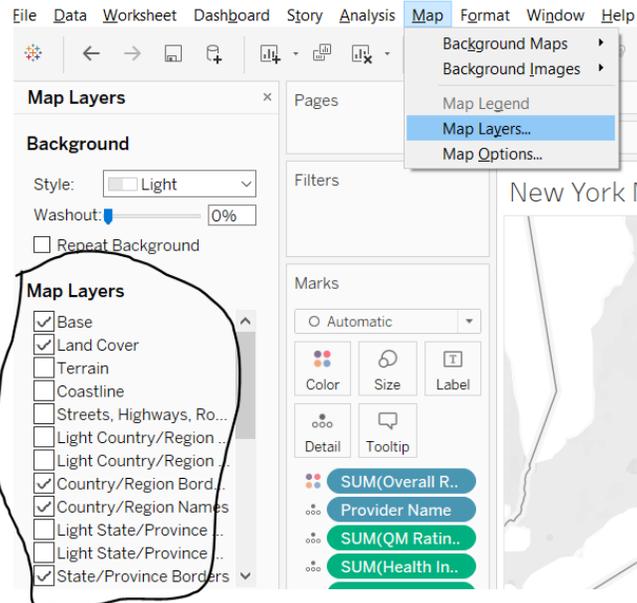
- Here, you can delete unwanted fields (**Latitude** and **Longitude**) and rearrange items (Moving up **Provider Name**, **SFF Status**, **Overall Ratings**).



## Finishing Touches

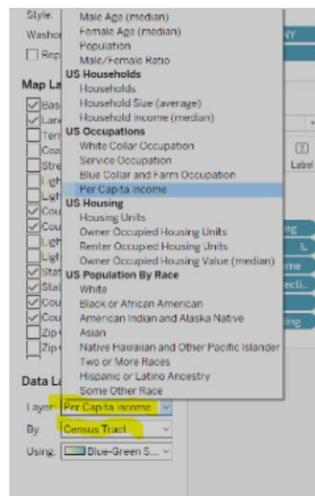
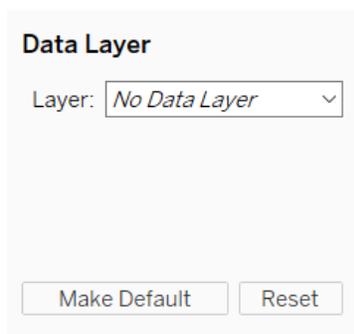
### 1. Map Layers

- Go to **Map** on top right and select **Map Layers**.
- Under **Map Layers**, select desired items (county names, county borders).



### 2. Data Layers

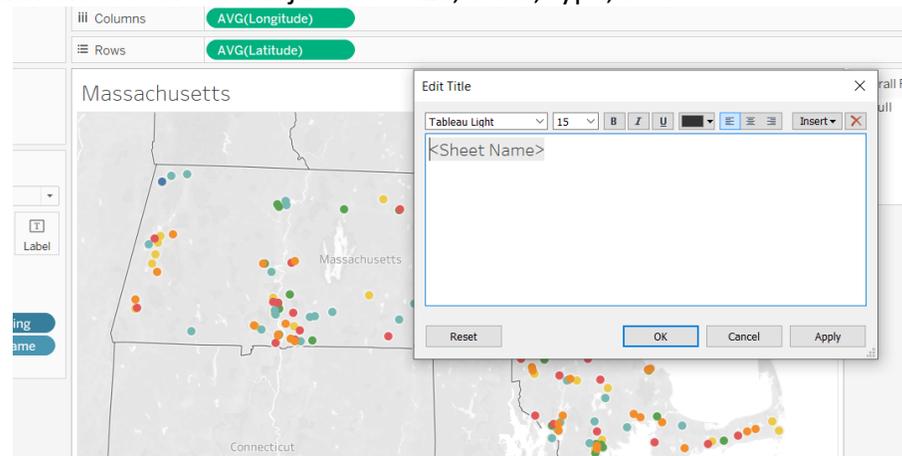
- Go to **Map** on top right and select **Map Layers**.
- On Bottom left under **Data Layer**, select desired demographic and boundary.



New York City Per Capita Income (By Census Tract)

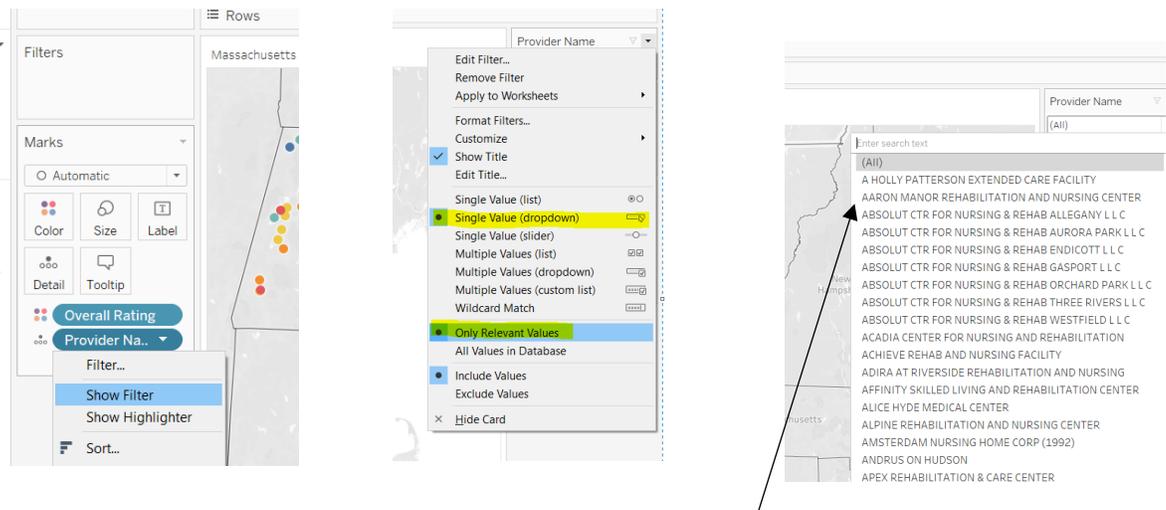
### 3. Title

- Double click the title area to adjust font size, color, type, etc.



### 4. Search Boxes

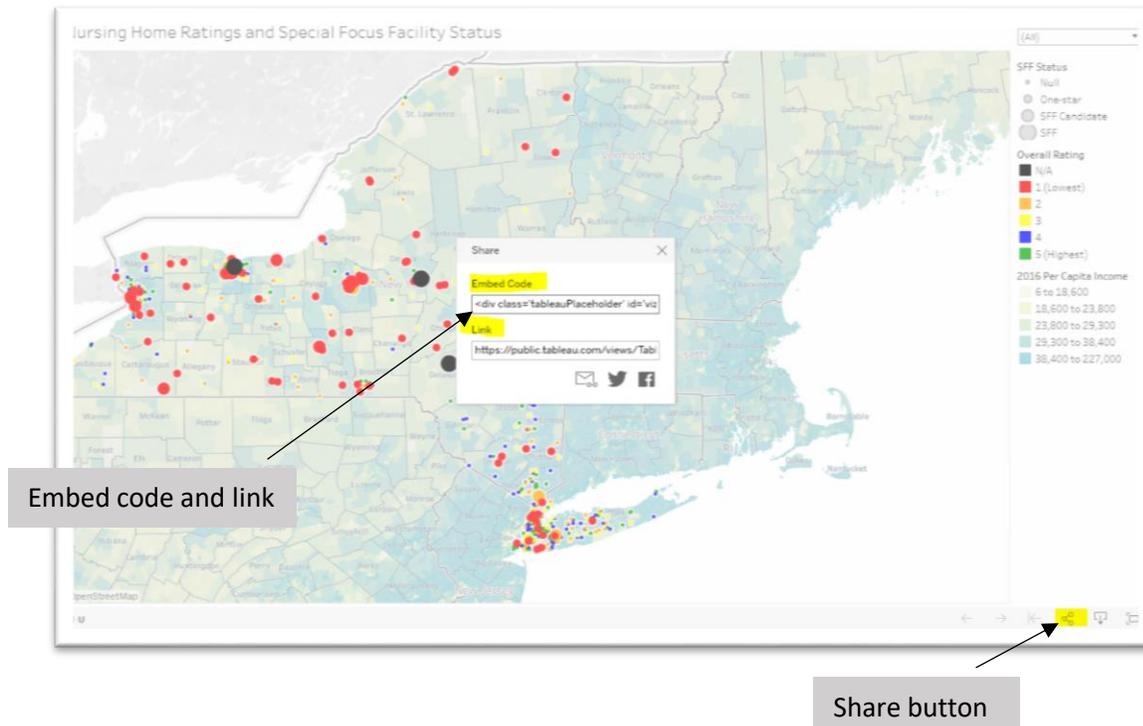
- To add a search box for facility, select arrow next to “Provider Name” and select **Show Filter**.
- A list will appear to the right of the map; click the dropdown arrow and select **Single Value (dropdown)**.
- Select **Only Relevant Values** to capture New York nursing homes. Now a dropdown menu should appear.
- Select **(All)** to show all facilities.



Dropdown list now includes  
*all* New York nursing homes

## Publishing and Embedding

1. Select file on top left and save to Tableau Public.
2. Once map is online, select share button on bottom right to find embed code and link. Your Tableau map is now complete. You may revise by editing file in Tableau and selecting save.



For additional resources on nursing home information and data, please visit:

[www.NursingHome411.org](http://www.NursingHome411.org).