



Using Excel Tables to Manipulate Billing Data, Part 2

By Nate Moore, CPA, MBA, CMPE

The May-June 2012 issue of *Billing* introduced tables in Excel, a powerful tool that is used to sort, filter, and organize data. Now that you are familiar with the basics of creating and using tables to sort and filter data, we will take your skills to the next level with features found in the Table Tools Design tab. To follow along with the data in this example, look for the download link with the May-June Billing article. Refer to the “Tables (Part 1)” article if you need help with table basics.

Getting Started with the Table Tools Design Tab

With the change to the ribbon starting in Excel 2007, Excel menus are context-sensitive. The objective is to only show tools on the ribbon that are appropriate to the Excel feature you are working with. To access the Table Tools Design tab, click anywhere inside the table. Click on “Design” in the ribbon and you should see the Table Tools Design tab as shown in Figure 1.

We will start with some of the easier features of tables. On the right-hand side of the Table Tools Design tab are a variety of pre-built ways to format the data in your table. Click on the bottom of the three arrows, circled in Figure 2. Your screen should look like Figure 3. Notice the wide variety of colors and styles already built for you. You can hover over a style to see how it will affect your data. The colors are based on the theme chosen for your worksheet, and to change the colors in the theme, you can click on “Themes” on the Page Layout tab as shown in Figure 4.

Table Style Options

Now that the colors of the table are set, look at the six checkboxes in the Table Style Options area of the ribbon. If you uncheck “Header Row,” the first row of your table with the column names and drop down arrows disappears. I almost always leave “Header Row” checked to take advantage of the sorting and filtering options discussed in last the issue’s article. The “First Column” and “Last Column” boxes highlight the first and last columns of your table based on the table style format.

If the first column of your table has critical data like a patient name or a claim number, or if the last column of your table has the accounts receivable balance, these checkboxes help you highlight that critical information.

Depending on the table style format, banded rows and columns shade or highlight every other row or column in your data. If you have a lot of columns and want to help users stay on the right row, try clicking “Banded Rows” and then try a few table styles to see which design makes your data easiest to read and follow. Figure 5 shows an example of table style “Medium 5” (hover over “Table Styles” to see the style name) using banded rows.

The most versatile and powerful of the six checkboxes is the “Total Row” check box. When you check that box, Excel adds a special “total row” to your table, as shown in Figure 6. When you click on a cell in the total row, Excel displays a drop-down box with options including “Count,” “Average,” and “Sum.” Choose “Count” to count the total number of values in the column. “Average” will give the average of the numbers in the column and “Sum” will total the values in the column. I have chosen “Sum” for the Balance column, “Max” for the Date column, and “Count” for the Doctor column to count the total number of claims in Figure 6.

If you look closely at Figure 6, you will notice another clever trick. When you scroll down in a table, Excel changes the column names from A, B, C, etc. to the names of your columns. If you follow along with this example, scroll down in your table and watch how Excel automatically changes the column names from A, B, and C to Claim, Balance, and Date. Changing the column names from the generic letters to your column names is a great way to keep track of which column you are in as you navigate a large table.

Inserting Rows and Columns in a Table

It is easy to add more data to an existing table. If you follow along with the example, highlight the total row that we created in the last section, right-click, and choose “Insert.” Excel will insert a new row into your table. The formatting from the table



FIGURE 1

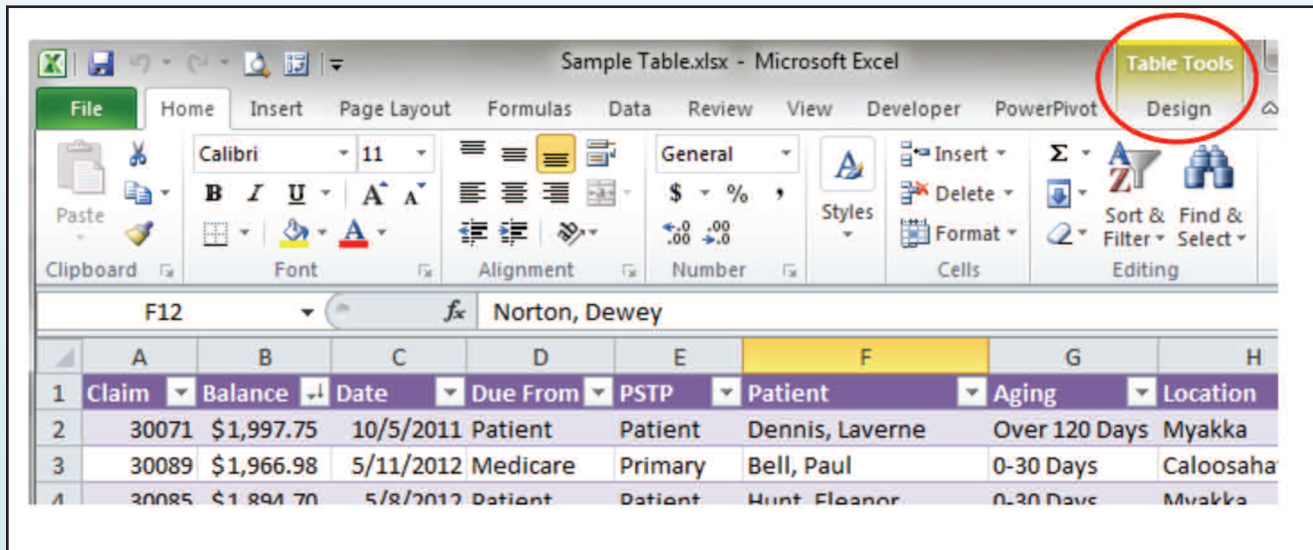


FIGURE 2

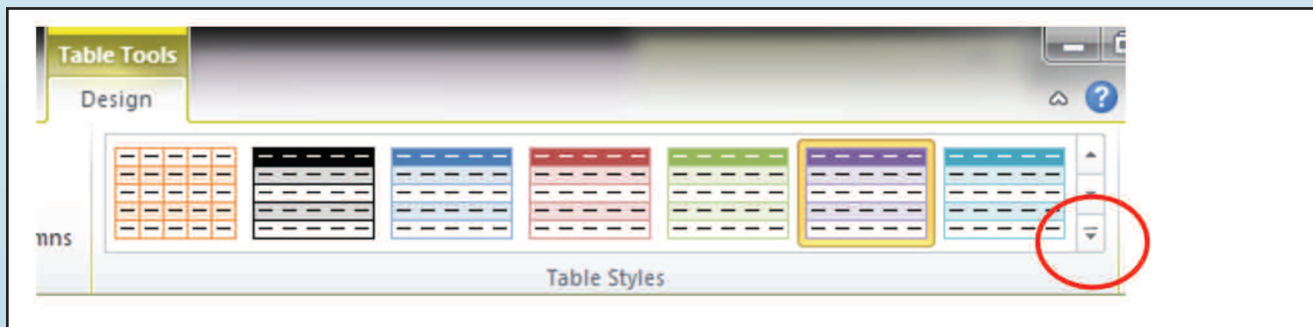


FIGURE 3

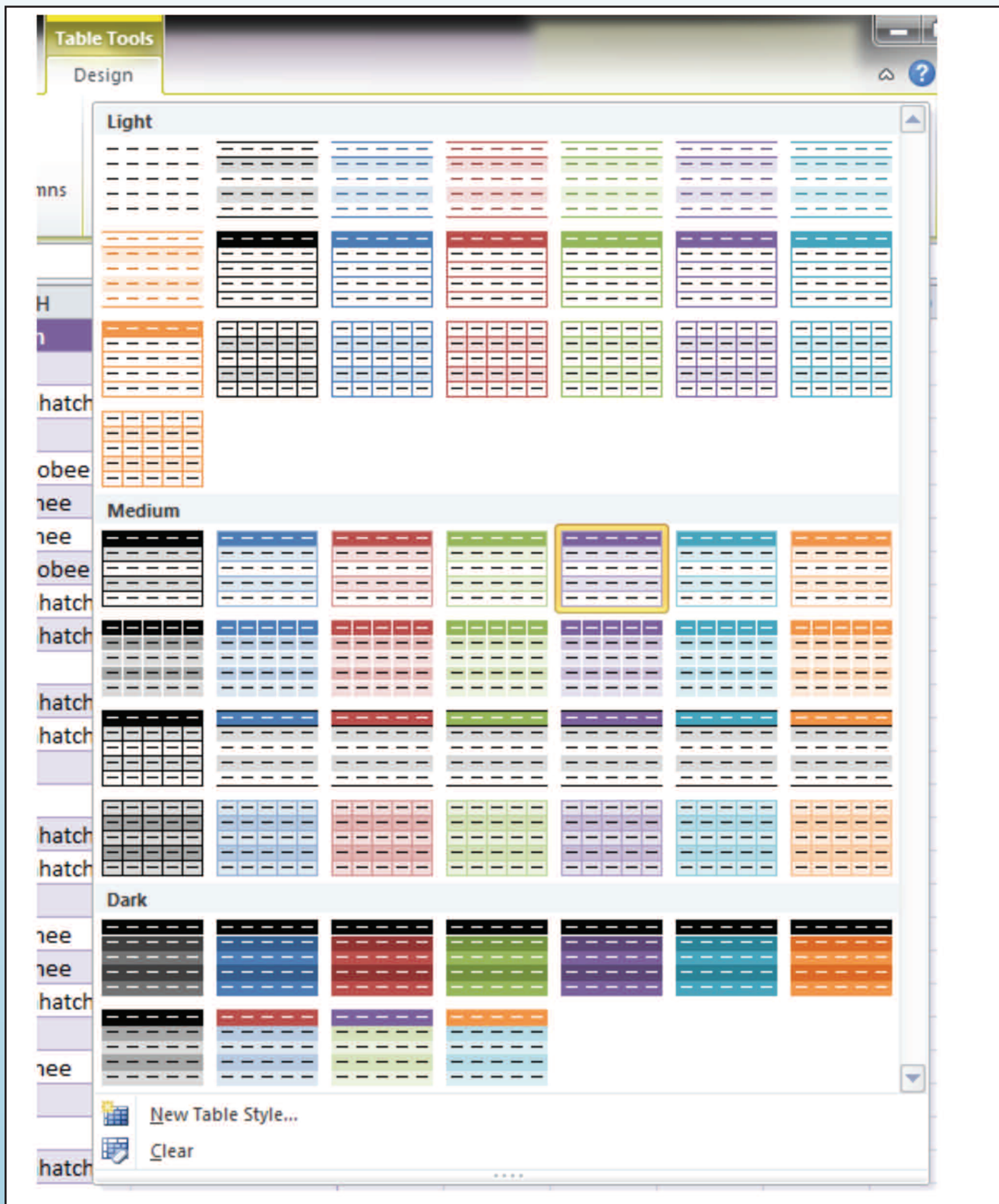




FIGURE 4

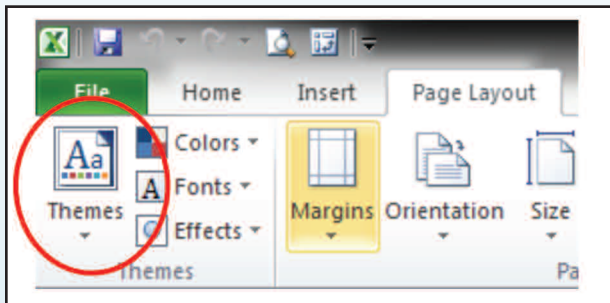


FIGURE 5

	A	B	C	D	E	F	G	H	I
1	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor
2	30071	\$1,997.75	10/5/2011	Patient	Patient	Dennis, Laverne	Over 120 Days	Myakka	Dr. Luce Del Sole
3	30089	\$1,966.98	5/11/2012	Medicare	Primary	Bell, Paul	0-30 Days	Caloosahatchee	Dr. Yang Guang
4	30085	\$1,894.70	5/8/2012	Patient	Patient	Hunt, Eleanor	0-30 Days	Myakka	Dr. Sonnenschein
5	30030	\$1,893.33	4/19/2012	Medicare	Primary	Chapman, Nicole	0-30 Days	Okeechobee	Dr. Yang Guang
6	30004	\$1,878.94	12/10/2011	Blue Cross	Primary	Lambert, Brian	Over 120 Days	Kissimmee	Dr. Luce Del Sole
7	30067	\$1,839.06	5/12/2012	Patient	Patient	Greene, Terri	0-30 Days	Kissimmee	Dr. Ensoleillement
8	30073	\$1,835.69	4/19/2012	Patient	Patient	Hanson, Sheila	0-30 Days	Okeechobee	Dr. Nisshou
9	30010	\$1,821.60	4/18/2012	Medicare	Primary	Mendez, Joan	0-30 Days	Caloosahatchee	Dr. Sonnenschein
10	30041	\$1,818.56	3/4/2012	Patient	Patient	Rodriguez, Ada	61-90 Days	Caloosahatchee	Dr. Sol
11	30014	\$1,810.10	4/11/2012	Patient	Patient	Adams, Shawn	31-60 Days	Myakka	Dr. Nisshou
12	30037	\$1,799.94	4/3/2012	Blue Cross	Primary	Norton, Dewey	31-60 Days	Caloosahatchee	Dr. Luce Del Sole
13	30002	\$1,790.46	5/12/2012	Patient	Patient	Bradley, Jesse	0-30 Days	Caloosahatchee	Dr. Luce Del Sole
14	30024	\$1,783.68	3/20/2012	Patient	Patient	Reed, Terrell	31-60 Days	Peace	Dr. Sol
15	30007	\$1,759.90	5/2/2012	Blue Cross	Primary	Long, Olive	0-30 Days	Peace	Dr. Ensoleillement
16	30081	\$1,746.52	4/14/2012	Blue Cross	Primary	Rodriguez, Floyd	31-60 Days	Caloosahatchee	Dr. Ensoleillement

FIGURE 6

	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor
98	30068	\$ 48.94	4/26/2012	Patient	Patient	Jackson, Annette	0-30 Days	Kissimmee	Dr. Luce Del Sole
99	30042	\$ 44.48	5/6/2012	AETNA	Primary	Pratt, Ignacio	0-30 Days	Caloosahatchee	Dr. Sol
100	30052	\$ 40.00	4/2/2012	Patient	Patient	Guerrero, Ted	31-60 Days	Caloosahatchee	Dr. Luce Del Sole
101	30066	\$ 38.94	3/16/2012	Blue Cross	Primary	Hubbard, Barbara	61-90 Days	Peace	Dr. Sonnenschein
102	Total	\$100,827.69	5/15/2012						100

FIGURE 7

	A	B	C	D	E	F	G	H	I	J
1	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor	Column1
2	30071	\$ 1,997.75	10/5/2011	Patient	Patient	Dennis, Laverne	Over 120 Days	Myakka	Dr. Luce Del Sole	\$ 998.88
3	30089	\$ 1,966.98	5/11/2012	Medicare	Primary	Bell, Paul	0-30 Days	Caloosahatchee	Dr. Yang Guang	\$ 983.49
4	30085	\$ 1,894.70	5/8/2012	Patient	Patient	Hunt, Eleanor	0-30 Days	Myakka	Dr. Sonnenschein	\$ 947.35
5	30030	\$ 1,893.33	4/19/2012	Medicare	Primary	Chapman, Nicole	0-30 Days	Okeechobee	Dr. Yang Guang	\$ 946.67
6	30004	\$ 1,878.94	12/10/2011	Blue Cross	Primary	Lambert, Brian	Over 120 Days	Kissimmee	Dr. Luce Del Sole	\$ 939.47
7	30067	\$ 1,839.06	5/12/2012	Patient	Patient	Greene, Terri	0-30 Days	Kissimmee	Dr. Ensoleillement	\$ 919.53
8	30073	\$ 1,835.69	4/19/2012	Patient	Patient	Hanson, Sheila	0-30 Days	Okeechobee	Dr. Nisshou	\$ 917.85
9	30010	\$ 1,821.60	4/18/2012	Medicare	Primary	Mendez, Joan	0-30 Days	Caloosahatchee	Dr. Sonnenschein	\$ 910.80

will continue with your new row and your data will be included in the total row as well.

It is just as easy to add a column. Click on cell J2 and add the formula “= B2*.5”. Not only does Excel generate the answer to the formula in cell J2 for you, but because your data is in a table, Excel assumes you want the same formula in the rest of your rows as well. You enter the first formula in the column, and Excel takes care of the rest by copying down the formula and the formatting. It’s a great trick. Your spreadsheet should look like Figure 7. Excel gives the new column the name Column1 in cell J1. Simply click on cell J1 and type in a better name for the column, like Expected Balance.

Tables are especially helpful for organizing detailed data like accounts receivable or pre-authorization data. Other Excel tools like pivot tables are great for summarizing data, but when you need to see details, regular tables are really hard to beat. There are still a few more tricks about tables you’ll find helpful, so watch the next issue of *Billing* for even more ways to take advantage of this powerful feature. To learn more, watch the

free playlist for tables, Excel Videos 30–43. ■

Nate Moore, CPA, MBA, CMPE speaks, consults, records, and writes about Microsoft Excel and data mining in medical practices throughout the country. His Excel Videos have been viewed over 75,000 times. Nate's latest project is KelaPro, software to automatically download critical practice data into Excel to create dashboards, reports, and analytic tools. Like PivotTableGuy on Facebook and follow PivotTableGuy on Twitter for more Excel tips and tricks.

References

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