



Working with Spreadsheet Tabs, Part 3

ORGANIZATION INCREASES EFFICIENCY AND EASE OF MIND

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The last two issues of *Billing* introduced tabs, an efficient way to organize data in spreadsheets. This article will build on the concepts in those two articles and use the same sample spreadsheet you built as you followed along with the earlier articles. Now that you are familiar with tabs, this article will introduce three more advanced tricks. First, we will use data on a different tab in a formula. Second, we will sum data across multiple tabs. Finally, we will change data across several tabs at the same time. If it has been a while since you read the articles in the March/April 2017 and May/June 2017 issues of *Billing*, you may find it helpful to review those articles before getting started. We will use the same sample spreadsheet we created then, so please recreate the spreadsheet if need be.

Use Data on a Different Tab in a Formula

Start by inserting a new tab between the Mar and Apr tabs you previously created. Name the tab “First Qtr,” as shown in Figure 1. Next, add text to cells A1, A3, A5, and A7 on the new First Qtr tab, as shown in Figure 2. We will build a

FIGURE 1

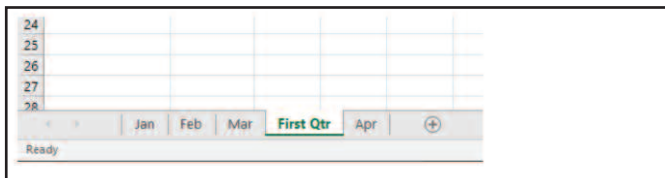


FIGURE 2

	A	B	C
1	First Quarter		
2			
3	Total Charges		
4			
5	Total Payments		
6			
7	Total Adjustments		
8			
9			
10			
11			

formula in cell B3 on the First Qtr tab to sum the total charges for January, February, and March. Type an equal sign (=) in cell B3, then navigate to the Jan tab, and select cell B3. Next, add to our formula by adding the plus symbol (+) and navigating to the Feb tab. Select cell B3 on the Feb tab. Repeat the process for the Mar tab. Your formula should look like the formula in Figure 3.

Notice the syntax in Figure 3. To reference a cell on another tab, enter the tab name, followed by an exclamation point, followed by the cell reference. It is easy to simply select the cells and have Excel build that syntax for you as we did in our last example. Now, change the name of the Jan tab from Jan to Jan 2017. Return to the formula in cell B3 on the First Qtr tab and notice that Excel has changed the formula for you, as shown in Figure 4. If a tab name includes a space, Excel surrounds the tab name in single quotes. The formula has ‘Jan 2017’ in single quotes, but

FIGURE 3

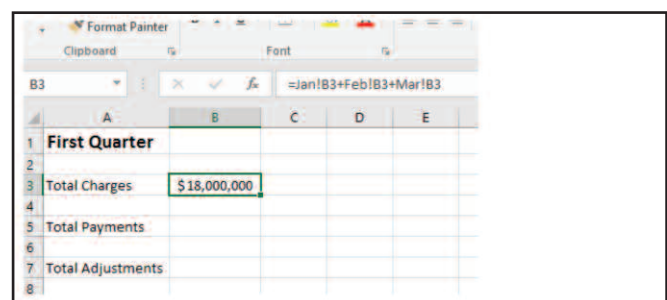
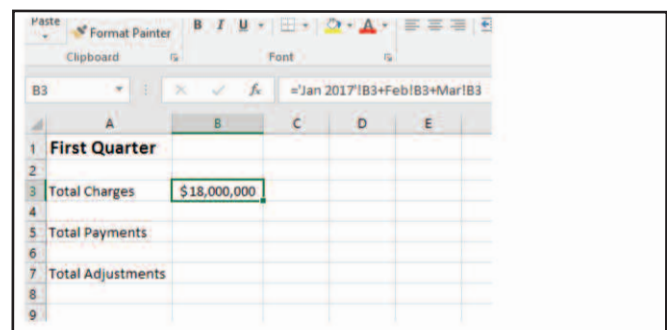


FIGURE 4



Feb does not need the quotes because the Feb tab name does not have a space. Practice building formulas across tabs by creating formulas for Total Payments and Total Adjustments. The results, including the formula for cell B7, are shown in Figure 5. Once you have built one formula across tabs, you can still copy and paste like you can with all Excel formulas. It helps that our spreadsheet design always has charges, payments, and adjustments in the same cell on each tab.

Summing Data Across Multiple Tabs

To make this example a bit easier, please rename the Jan 2017 tab back to Jan. Now consider the formula in Figure 6. The formula is `=SUM(Jan:Mar!B3)`. The formula is summing cell B3 starting on the Jan tab and continuing through the Mar tab. A colon goes between Jan and Mar to indicate the range of tabs to sum. That formula is a cleaner way to sum across tabs, especially if you have lots of tabs to sum across. A formula summing every month in a year would be `=SUM(Jan:Dec!B3)`, which is much more concise than adding Jan charges to Feb charges all the way through Dec charges as we did in our first example. The disadvantage is that Excel doesn't build this formula for you like in our first example.

Now change the tab name for Jan back to Jan 2017. Our formula that sums across tabs in cell C3 on the First Qtr tab is now changed to accommodate the space in the tab name. Figure 7 is an example of the revised formula with the Jan 2017 tab name. The formula requires single quotes again, but this time for the entire tab name reference from Jan 2017 through Mar. The formula is `=SUM('Jan 2017:Mar'!B3)`. Please practice by repeating this formula for payments and adjustments.

Changing Multiple Tabs at Once

Now assume that you are finished with the spreadsheet and the physician prefers that, instead of "Total Charges," the text in cell A3 on each tab read "Total Billed Charges." Rather than go to each tab and change the text, or even copy and paste the change to each tab, there is a faster way: select the three tabs Jan 2017, Feb, and Mar, using the Ctrl or Shift keys—your screen should then look like

FIGURE 5

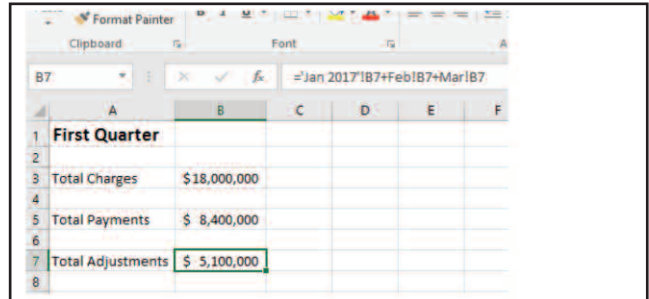


FIGURE 6

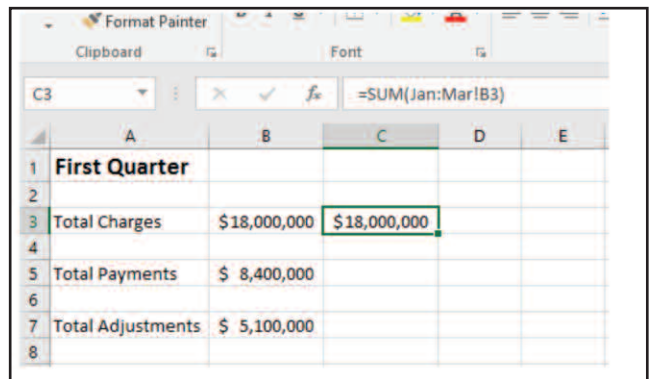


FIGURE 7

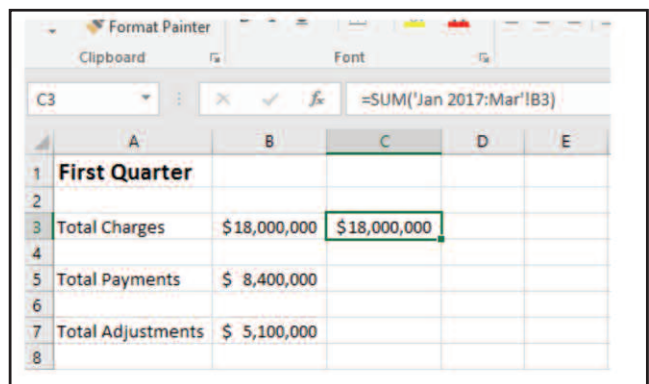


FIGURE 8

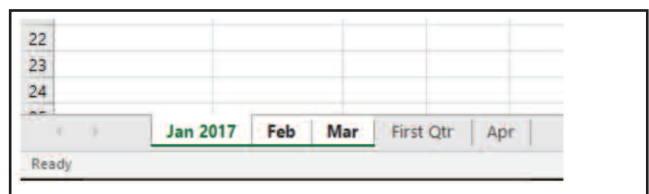




Figure 8. The first three tabs are selected and therefore show as a different color than the First Qtr and Apr tabs. Navigate to cell A3 on any of the three tabs. Change the text in cell A3 to “Total Billed Charges.” Each selected tab now has the new name.

Be careful. As long as you have all three tabs selected, any changes you make to a selected tab will be made to all selected tabs. To go back to editing one tab at a time, click on another tab like First Qtr or Apr. This trick can save considerable time on spreadsheets with many similar tabs.

I hope this series on tabs has been a big timesaver for you. For dozens of free articles and free videos on using

Excel in a medical practice, please visit www.moore-solutionsinc.com. ■

Nate Moore, CPA, MBA, FACMPE,, writes custom SQL Server code to mine practice management data for analysis in Excel, web pages, and email. Nate's first book, Better Data, Better Decisions: Using Business Intelligence in the Medical Practice, written with Mona Reimers, is an MGMA bestseller. His free Excel videos have been viewed over 2 million times and are available at moore-solutionsinc.com. Like PivotTableGuy on Facebook, or follow @PivotTableGuy on Twitter to be notified each time a new video is released.



CHBME QUIZ QUESTIONS



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- It is possible to sum data across multiple tabs.
 - True
 - False
- In what year was the Compliance Program Guidance for Third-Party Medical Billing Companies published?
 - 1993
 - 2011
 - 2016
 - 1998
- If a client calls to correct a code on a superbill, you should:
 - Change it
 - Request the change in writing
 - Submit the claim “as-is”
 - Submit the claim with a note
- Telehealth laws are changing daily.
 - True
 - False
- According to Kirschenbaum, protecting your company from a potential exposure requires appointing an individual to:
 - Keep up-to-date on compliance
 - Ensure quality assurance
 - Introduce education, policies and procedures
 - All of the above
- Getting on the OCR, HIPAA, and NIST list serves to receive compliance updates will keep your company up-to-date.
 - True
 - False
- How do you calculate a hospital's payment for an inpatient admission?
 - Multiply the RW for the patient's MS-DRG by the HBR
 - Add the RW for the patient's MS-DRG to the HBR
 - Subtract the RW for the patient's MS-DRG from the HBR
 - This doesn't need to be calculated
- What determines the hospital's payment?
 - RVUs
 - UHDDS
 - MS-DRG
 - CC/MCCs
- DBMPBMA stands for “Don't Bring Me Problems, Bring Me Answers”
 - True
 - False
- A company's growth is independent from its peoples' growth.
 - True
 - False