Working with Spreadsheet Tabs, Part 1

ORGANIZATION INCREASES EFFICIENCY AND EASE OF MIND

By Nate Moore, CPA, MBA, CMPE

Spreadsheet tabs are a great way to organize spreadsheet data. Tabs can hold data on months, locations, physicians, and more. This article will introduce the basics of working with tabs—we will insert, delete, and name tabs. Watch for the next issue of *Billing* to learn how to copy, move, hide, and color tabs. The more familiar you are with tabs, the more you can manage large spreadsheets with increasingly complex data, which sounds a lot like today's medical practice! Let's get started.

Inserting and Deleting Tabs

Figure 1 shows an initial blank spreadsheet with one tab. By default, the tab is named Sheet1. One of the first tricks to working with tabs is to note that the tab is named Sheet1, not Sheet 1. It is easier to work with tabs in formulas if the tab name does not include a space. We will learn how to deal with spaces in tab names later in this series of articles but, to start, simply note that it is easier if the tab names do not include spaces.

One way to insert tabs is to click the plus (circled in red in Figure 1) to the right of the last tab. Click the plus to add two tabs—your screen should now look like Figure 2. Notice how Excel named the new sheets Sheet2 and Sheet3. Tabs are sometimes called sheets, and I will use "tab" and "sheet" interchangeably in this series of articles.

Another way to insert tabs is to right-click a tab; I have right-clicked Sheet3 in Figure 3. This right-click menu has the options we need for this article and for the next article in this series. Insert is at the top of the list. Click 'Insert' and your screen should look like Figure 4. The Insert window has a variety of pre-built templates you can use to create a new spreadsheet. There are additional templates available on the Spreadsheet Solutions tab. To be honest, the only option I have ever used is Worksheet, circled in red on Figure 4. Click OK, and Excel will add a tab to the left of the tab you selected when you right-clicked. Your screen should look like Figure 5. Note that because the right-click method adds tabs to the left, our worksheet tabs are out of order. We will fix that and move spreadsheet tabs in the next issue of *Billing*.

FIGURE 1

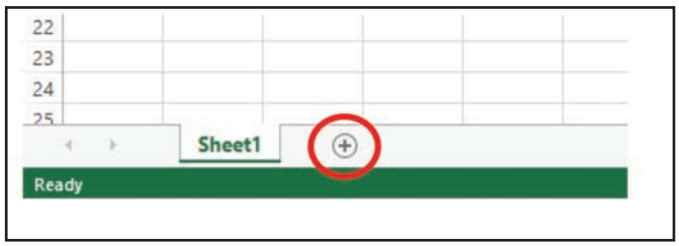


FIGURE 2

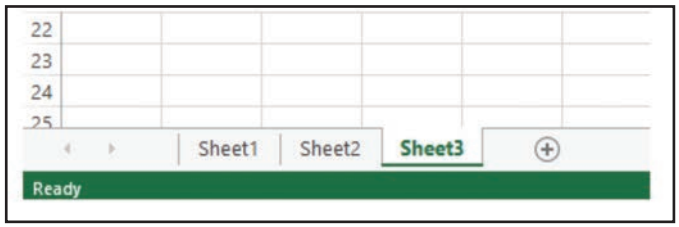


FIGURE 3

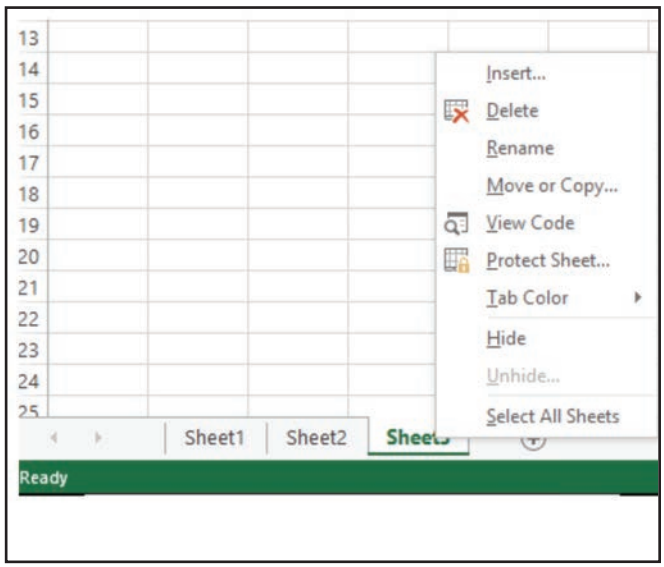


FIGURE 4

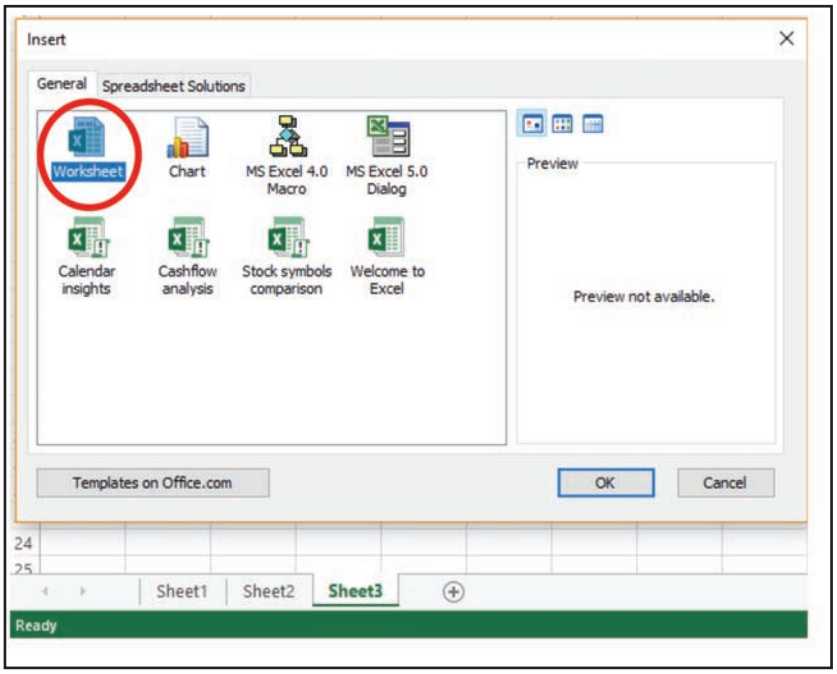


FIGURE 5

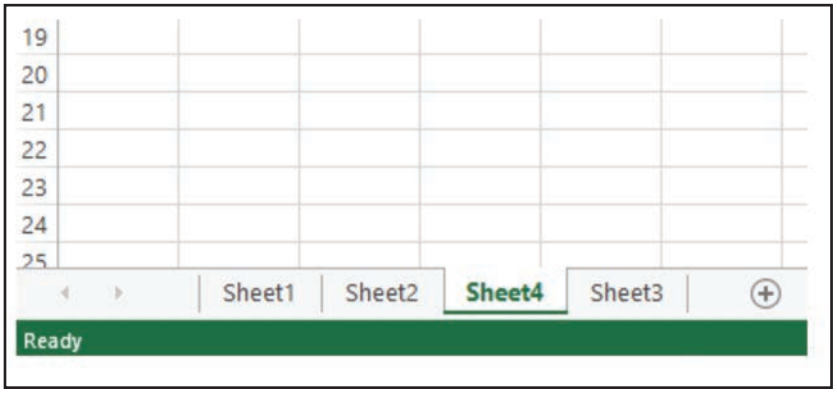
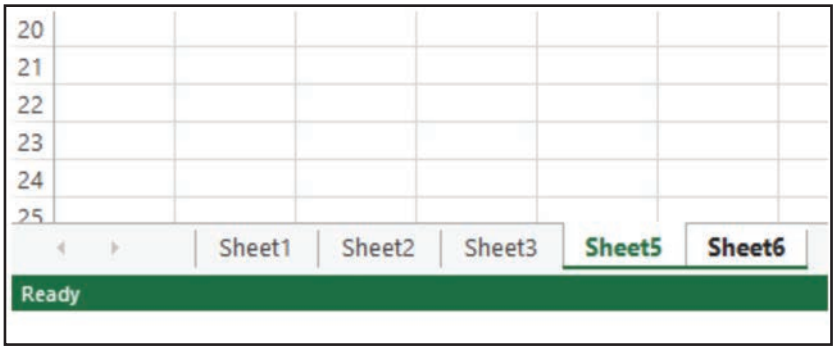


FIGURE 6



In the meantime, it is easy to delete the out-of-order Sheet4. Simply right-click Sheet4 to see the menu shown in Figure 3 and select Delete. If you have data on the tab, Excel will warn you before deleting the tab. Since our tab is blank, Sheet4 is deleted without a warning.

Now insert two more tabs using either the plus button or the tab right-click menu. My new sheets are named Sheet5 and Sheet6. Select one of the new tabs, and hold down Shift (to select an adjacent tab) or Ctrl (to select a non-adjacent tab) to select the other new tab. Notice in Figure 6 how Sheet5 and Sheet6 are both selected and look different than Sheet1, Sheet2, and Sheet3. Now right-click and choose Delete; both tabs are deleted—it is that easy to delete multiple tabs at once.

Naming Tabs

As spreadsheets get more complicated, it is very helpful to name tabs to identify the data on each tab. Click Sheet1 to select the tab. Note that clicking the tab also selects the sheet, since a primary purpose of tabs is to navigate through your spreadsheet. From the same right-click option in Figure 3, choose the third option down: Rename. Rename Sheet1 "Jan."

You can also double-click a tab name to rename it. Double-click Sheet2 and rename it "Feb." Choose either method to rename Sheet3 "Mar." (Note that I am not including the period in the tab name.) Your screen should look like Figure 7.

Now we need some data with which to play. Click on the Jan. tab, and add the data shown in Figure 8. Then copy the data to the Feb. and Mar. tabs, taking care to paste the data in exactly the same cells as the Jan. tab. We will need this data as we go throughout this series of articles. Change the month names in cell A1 on the Feb. and Mar. tabs to the appropriate month.

FIGURE 7

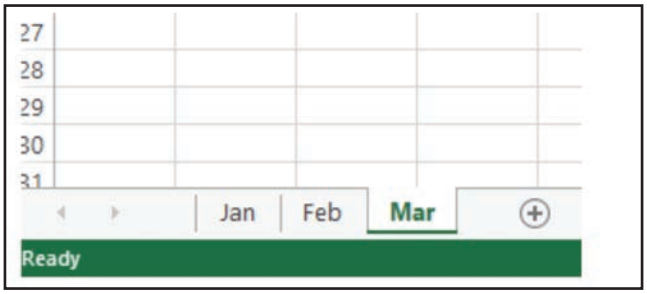


FIGURE 8

	A	B	C
1	**January**		
2			
3	Total Charges	$ 6,000,000	
4			
5	Total Payments	$ 2,800,000	
6			
7	Total Adjustments	$ 1,700,000	
8			

Looking Ahead

This article introduced the basics of working with tabs in a spreadsheet. Save your practice spreadsheet; in the next issue of *Billing*, we will use that spreadsheet to build on these examples with more tab fundamentals from the right-click menu. For dozens of free articles and hundreds of free videos on using Excel in a medical practice, please visit www.mooresolutionsinc.com. ■

Nate Moore, CPA, MBA, FACMPE, writes custom SQL Server code to mine practice management data for analysis in Excel, web pages, and via 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 mooresolutionsinc.com. Like PivotTableGuy on Facebook, or follow @PivotTableGuy on Twitter to be notified each time an Excel Video is released.

CHBME QUIZ QUESTIONS

You can earn 1 credit toward your CHBME by answering quiz questions in each issue of *Billing*. Go to www.hbma.org/ceu or use your smartphone to go directly to the site.

1. **What is the purpose of including an escalator clause in a contract?**
   a. To ensure your liability is in line with your services.
   b. To allow for an increase or decrease in fee under certain conditions.
   c. To provide time to accept or negotiate changes to the contract.
   d. To render a contract void.
2. **Eligible practices that don't participate in MIPS will receive a _____ percent negative payment adjustment.**
   a. 2 b. 4 c. 6 d. 8
3. **Which of the following is not one of the four components of MIPS?**
   a. Value modifier c. Improvement activities
   b. Quality reporting d. Quality reporting
4. **How can your organization prepare for success in CMS's QPP?**
   a. Education your organization
   b. Gain buy-in from the executive team
   c. Create a MIPS organizational structure
   d. All of the above
5. **The new Quality Payment Program includes:**
   a. MIPS and Advanced APMs
   b. PQRS, Value Modifier, and Meaningful Use
   c. None of the above
   d. All of the above
6. **What percentage of doctors are not going to change the way they practice an accept the QPP penalties?**
   a. 10 b. 4.5 c. 8.4 d. 7.9
7. **Predicting how the implementation of new payment programs will impact what you may have to add to your workflow and how much your costs will be affected is simple.**
   a. True b. False
8. **A new guideline in chapter 5 of the CCI Manual states that repair and closure of a blood vessel used for vascular access during the performance of a procedure is:**
   a. Included in the procedure and should be reported separately
   b. Not included in the procedure and should be reported
   c. Not included in the procedure and should not be reported
   d. Included in the procedure and should not be reported separately
9. **You can change the name of a tab by:**
   a. Right-clicking and choosing rename
   b. Double clicking and typing in a new name
   c. Clicking on File and resaving
   d. A and B
10. **The 80/20 rule states that an interview candidate should speak 80 percent of the time during the interview, and the interviewer the other 20 percent.**
    a. True b. False