



Conditional Formatting, Part 4

USING ICON SETS TO CREATE MORE INFORMATIVE SPREADSHEETS

By Nate Moore, CPA, MBA, CMPE

We have discussed many ways to use Excel's conditional formatting feature in the past three issues of *Billing*. Now that we are familiar with conditional formatting, we will add icon sets to make your spreadsheets even more informative. To follow along with these examples, look for the download link at mooresolutionsinc.com/articles.php. Once you have downloaded the spreadsheet, look for the "May Jun 13 Practice" tab.

What Are Icon Sets?

Icon sets differ from the data bars and color scales that we have worked on previously. Instead of shading cell backgrounds to indicate comparisons, icon sets are a built-in set of arrows, stoplights, and other symbols that can either be placed next to a value in a cell or used as the only piece of information in a cell. For example, compare Figures 1 and 2. Both figures report new patient referrals from a group of physicians. In Figure 2, you can quickly determine whether referrals are up, flat, or down from each provider thanks to the arrows next to the values in the change column.

You can easily add icons to your spreadsheet. To follow along with this example, go to the "May Jun 13 Practice" tab, highlight cells D4 through D12, and click "Conditional Formatting" from the Home tab of the ribbon. Select "Icon Sets" and choose the top left option, "3 Arrows (Colored)," as shown in Figure 3. Your screen should look similar to Figure 4. Take a minute to look at the wide variety of predefined icons you can choose from under "Conditional Formatting" and "Icon Sets." There are several different versions of arrows, stoplights, and indicators, including cell phone bars, stars, and flags.

Customizing Icon Sets

Look carefully at Figures 2 and 4. The numbers are the same, but the arrows differ in color and direction in the two examples. Rather than accept the default categorization of green, yellow, and red arrows that we created in Figure 4, I customized the way the arrows work to produce Figure 2. To customize icon

sets, select cells D4 through D12 again, choose "Conditional Formatting," then "Manage Rules." Your screen should look like Figure 5. Click "Edit Rule" to bring up the Edit Formatting Rule window, as shown in Figure 6.

First notice the drop-down box underneath the heading "Format all cells based on their values." You may remember this screen from prior conditional formatting articles in *Billing*, since you can change to two-color or three-color scales or data bars from this drop-down menu. Underneath the "Format Style" drop-down box is an "Icon Style" drop-down box that allows you to choose which set of icons you want to use. The "Reverse Icon Order" button to the right allows you to make high numbers red instead of green, which helps if you are reporting golf scores or cholesterol levels. Check the "Show Icon Only" box to hide the value in the cell and only show the icon.

The "Display each icon according to these rules" section allows you to customize when icons change. In Figure 6, the green icon is displayed when the cell's value is greater than or equal to 67 percent, the yellow icon is displayed when the cell's value is less than 67 percent and greater than or equal to 33 percent, and the red arrow is displayed when the cell's value is less than 33 percent. Click on the drop-down arrow next to "Type" to the right of the Edit Formatting Rule window. You will see options based on the number, percent, formula, or percentile in the cell. To match the settings I used, look at Figure 7. Once you have changed your settings to match Figure 7, your screen should look like Figure 2.

To save space on dashboards or other reports, you can check the "Show Icon Only" box to only show the icon instead of the value. In Figure 8, the trend in patient satisfaction is displayed using circles similar to those used in *Consumer Reports*. You can replicate the report in Figure 8 using cells B18 through D27 on the "May Jun 13 Practice" tab on the sample spreadsheet. To see my solution, highlight the same cells on the "May Jun 13 Answers" tab and select "Conditional Formatting" and "Manage Rules." Once you can make the circles work, create a rule to make any scores of 4 or 5 green, make 3 yellow, and anything less than (continued on page 50)



FIGURE 1

3 ARROWS ICON SET			
NEW PATIENT REFERRALS			
	2011	2012	Change
Dr. Ishi	74	63	(11)
Dr. Médecine	58	69	11
Dr. Medico	48	87	39
Dr. Arzt	85	74	(11)
Dr. Yīshēng	62	65	3
Dr. Vrach	47	57	10
Dr. Giatrós	75	60	(15)
Dr. Uisa	59	60	1
Dr. Läkare	54	74	20

FIGURE 2

3 ARROWS ICON SET			
NEW PATIENT REFERRALS			
	2011	2012	Change
Dr. Ishi	74	63	↓ (11)
Dr. Médecine	58	69	↑ 11
Dr. Medico	48	87	↑ 39
Dr. Arzt	85	74	↓ (11)
Dr. Yīshēng	62	65	→ 3
Dr. Vrach	47	57	↑ 10
Dr. Giatrós	75	60	↓ (15)
Dr. Uisa	59	60	→ 1
Dr. Läkare	54	74	↑ 20

FIGURE 3

The screenshot displays the Microsoft Excel ribbon with the 'Conditional Formatting' menu open. The 'Icon Sets' option is selected, showing a dropdown menu with various directional arrow icons. The background shows a portion of an Excel spreadsheet with columns O, P, Q, and R.

FIGURE 4

3 ARROWS ICON SET				
NEW PATIENT REFERRALS				
	2011	2012	Change	
Dr. Ishi	74	63	↓ (11)	
Dr. Médecine	58	69	→ 11	
Dr. Medico	48	87	↑ 39	
Dr. Arzt	85	74	↓ (11)	
Dr. Yīshēng	62	65	→ 3	
Dr. Vrach	47	57	→ 10	
Dr. Giatrós	75	60	↓ (15)	
Dr. Uisa	59	60	↓ 1	
Dr. Läkare	54	74	→ 20	

FIGURE 5

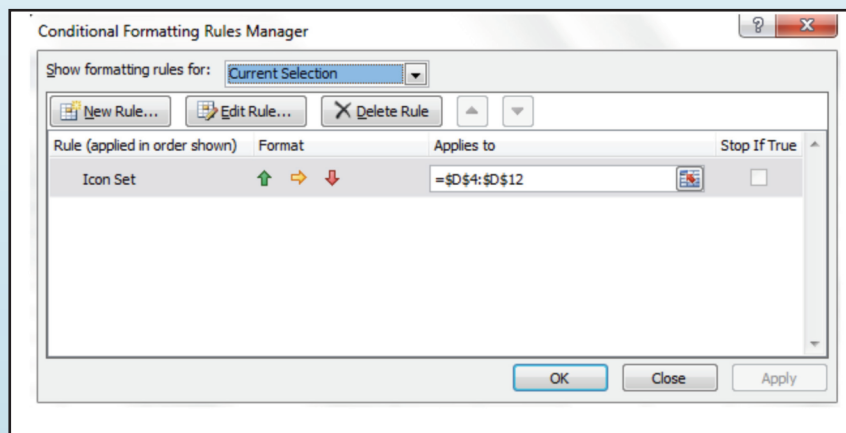


FIGURE 6

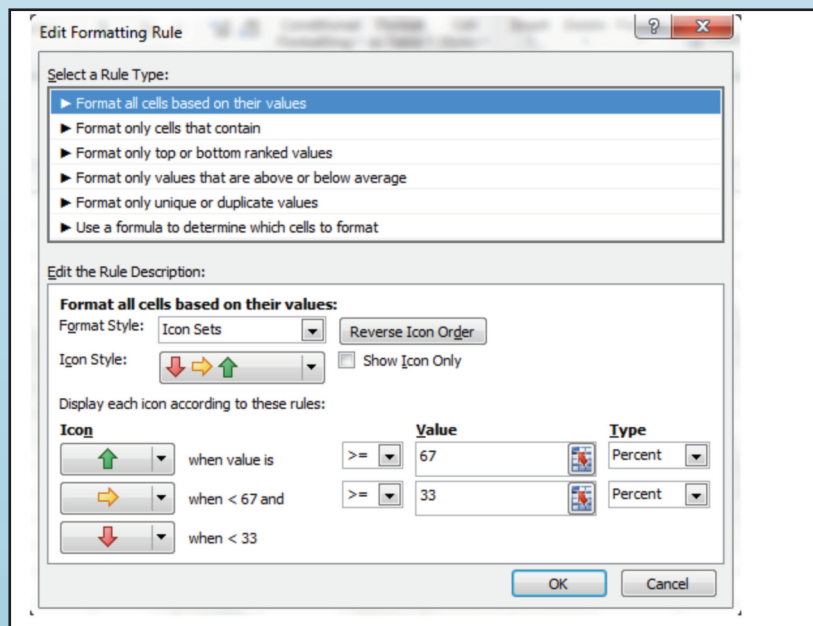




FIGURE 7

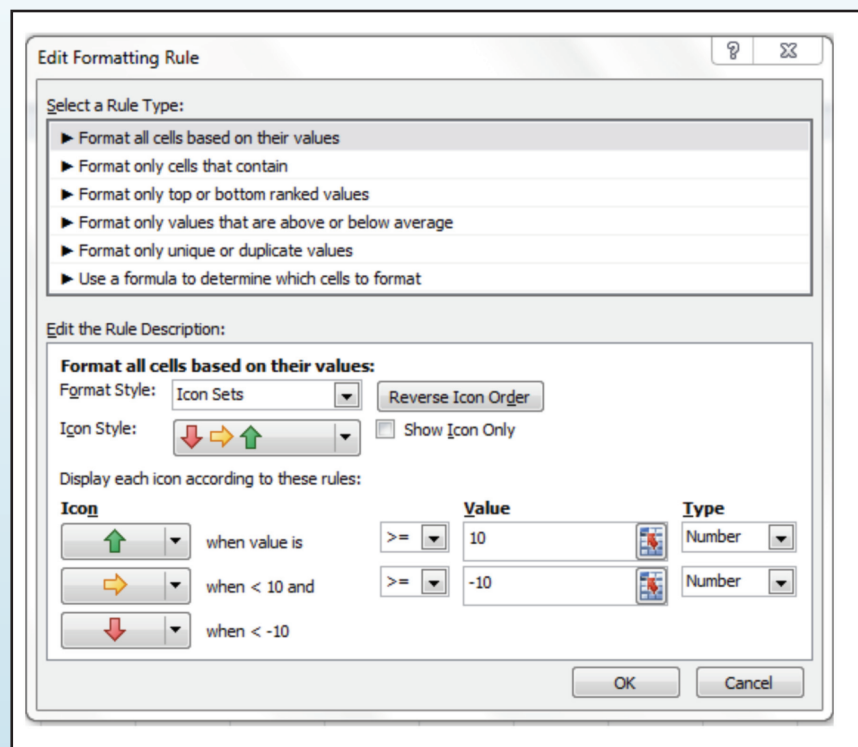


FIGURE 8

ICON ONLY FROM ICON SET			
PATIENT SATISFACTION SURVEY			
	2010	2011	2012
Question 1			
Question 2			
Question 3			
Question 4			
Question 5			
Question 6			
Question 7			
Question 8			
Question 9			
Question 10			

3 red. Note that colorblind readers of your reports might appreciate icon sets where the color and the shape change instead of just changing the color.

I hope this series of articles has helped you enhance the way you report data to the practices you support. You can also use conditional formatting to quickly analyze new data, such as finding specific denial codes and making them bright yellow on a report from your clearinghouse. To see additional conditional formatting examples, watch the free videos found in the playlist for conditional formatting, Excel Videos 44 – 60, at

mooresolutionsinc.com/videos.php. If you missed some of the earlier articles on conditional formatting, visit mooresolutionsinc.com/articles.php. ■

Nate Moore, CPA, MBA, FACMPE writes custom code to mine practice management data for practices throughout the country. His free Excel Videos have been viewed over 350,000 times and are available at mooresolutionsinc.com. Like PivotTableGuy on Facebook and follow PivotTableGuy on Twitter to be notified each time a new Excel Video is released.



CHBME QUIZ QUESTIONS



You can now **earn 0.5 credits towards your CHBME** by answering quiz questions in each issue of *Billing*. Go to www.hbma.org/ceu or use your smart phone to go directly to the site.

1. Patients do not need to pay up front if you are offering them a payment plan.
a. True b. False
2. What percentage of companies will disappear in the future?
a. 20%
b. 35%
c. 30%
d. 25%
3. Workers Compensation payors are HIPAA exempt from adopting ICD-10-CM.
a. True b. False
4. Excel icon sets can be used to highlight denial codes in a spreadsheet.
a. True b. False
5. A patient may request a restriction on the disclosure of his or her protected health information (PHI) if:
a. The disclosure is for payment or health care operations
b. Such disclosure is not otherwise required by law
c. The PHI pertains only to a health care item or service for which the patient has paid the provider for in full
d. All of the above
6. The AMA offers a flyer that practices can access to challenge out-of-network payments.
a. True b. False
7. The most recent EHR products allow outside interfacing.
a. True b. False
8. In order to meet Stage 2 of Meaningful Use, it is necessary to offer a secure messaging option for patients.
a. True b. False
9. Due to the lack of which three reasons do people fail in business?
a. Clarity, conviction, congruency
b. Congruency, commitment, clarity
c. Commitment, conviction, clarity
d. Clarity, congruency, consistency
10. To protect itself, a billing company's service agreement with a subcontractor should specify that the subcontractor is engaged as:
a. An independent contractor
b. An agent
c. A covered entity
d. All of the above