



Working with Spreadsheet Tabs, Part 2

ORGANIZATION INCREASES EFFICIENCY AND EASE OF MIND

By Nate Moore, CPA, MBA, FACMPE

Spreadsheet tabs can turn a complex, unwieldy spreadsheet that reaches across hundreds of columns and rows into a much more manageable data organizer. This article will build on the basics of working with tabs discussed in the March/April 2017 issue of *Billing*. In this issue, you will learn how to copy, move, hide, and color tabs. Once you have the fundamentals, there are several tricks to use data on a different tab in a formula, to sum data across multiple tabs, and to change data across several tabs at the same time. Watch for these tricks in the next issue of *Billing*.

Copying and Moving Tabs

If it has been a while since you read the article in the March/April 2017 issue of *Billing*, you may find it helpful to review that article before getting started. We will use the same sample spreadsheet we created then, so please recreate the spreadsheet if need be. When you copy-and-pasted the data, remember how your column widths did not

copy with the cells? You had to go back and fix the column widths on each pasted tab. We can make this easier. Right-click the Mar tab and choose the fourth option—Move or Copy. Your screen should look like Figure 1. Choose “(move to end)” and check the “Create a copy” box. Click OK. First, the good news: The new tab now looks exactly like the Mar tab. You don’t have to resize all the columns. Copying the tab, instead of selecting cells to copy/paste, copies the entire tab and preserves the column width.

The bad news is not very bad, either. We simply need to fix the tab name. Excel cannot have two tabs with the same name. Tabs with the same name would not allow formulas between tabs. To rename the tab, just right-click the tab and choose Rename as we did in the first article in this series. I renamed the tab “Apr.”

There are two ways to move tabs if you need to change the tab order. I generally just drag the tabs to the order I need. In a spreadsheet with many tabs, you can right-click the tab and choose Move or Copy as we did in Figure 2. To move instead of copy, simply uncheck the “Create a copy” box, and move the tab where you need it.

FIGURE 1

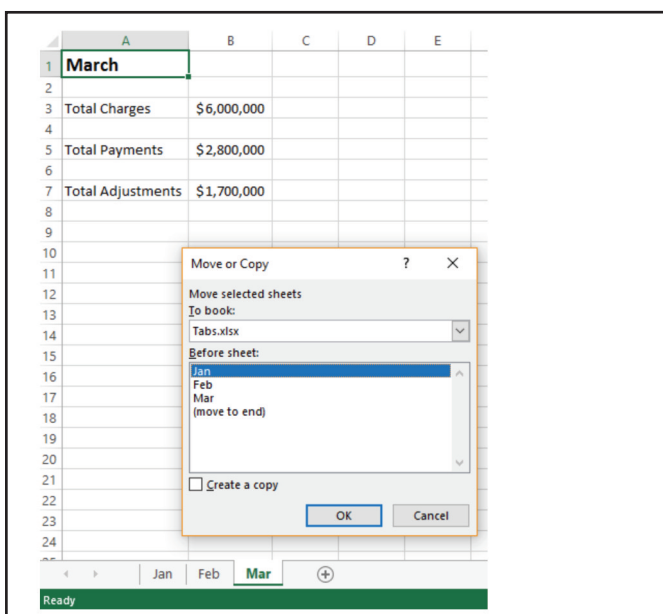
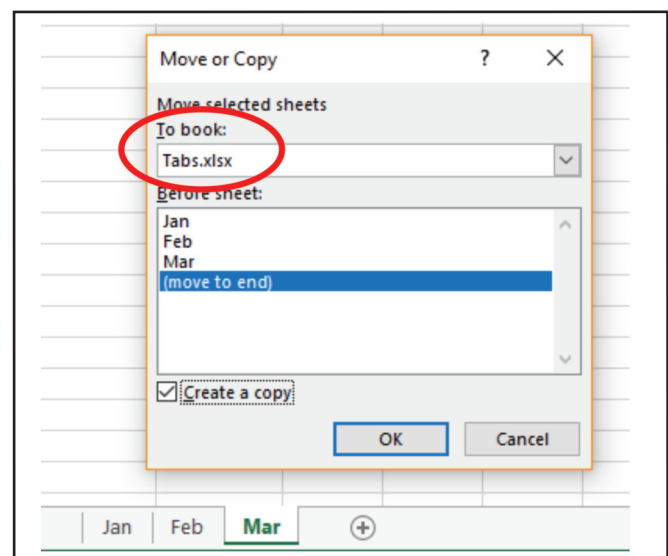


FIGURE 2



Note the red circle in Figure 2. You can easily move or copy a tab to any open spreadsheet or to a new spreadsheet. You are not limited to copying and moving tabs within the same workbook. The dropdown menu to the right of the red circle will display any open spreadsheets or allow you to create a new spreadsheet by copying or moving the tab. Note that Excel will not let you move all the tabs out of a spreadsheet. If you do need to move all the tabs, simply create an additional tab in the original workbook that will not be moved. You could also create a copy of the tabs in the new spreadsheet instead of moving all the tabs.

Hiding and Tab Color

There are two more options on the tab right-click menu to discuss. First, if you ever need to hide a tab, choose Hide. The tab will no longer appear. In Figure 3, I have hidden the Feb tab. Once you have a hidden tab, the tab right-click menu now has an Unhide option, as shown in Figure 4. The Unhide window shows all hidden tabs on the spreadsheet. Select the tab or tabs to unhide and click OK, as shown in Figure 5. I do not hide tabs very often. Hiding tabs does not protect the content on the tab, since the tab right-click menu makes it easy to unhide any sensitive tabs. You might hide tabs to conserve tab space on a very large spreadsheet or to simplify a complex spreadsheet you give to staff who are new to Excel.

I change tab color very frequently. Changing the tab color makes it easy to highlight specific tabs. Sometimes I will highlight the source data tab. Other times I will change the color of the summary dashboard tab. Changing the tab color makes it easy to draw users' attention to the important tabs in a workbook. You can also use colors as visual clues. The east location might be blue on each spreadsheet you build, for example. For spreadsheets I use infrequently, I will color a tab to remind me where to start or where to enter data. To change the tab color, choose Tab Color from the tab right-click menu. Your screen should look like Figure 6 (see next page). Excel offers a variety of colors based on your spreadsheet's theme. The More Colors option at the bottom of the window gives plenty of options to customize the color of each tab.

Looking Ahead

This article finishes our introduction to the basics of working with tabs in a spreadsheet. Please continue to save your sample workbook. In the next issue of *Billing*, we will add

FIGURE 3

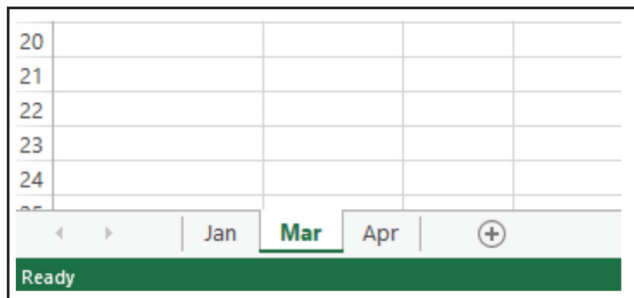


FIGURE 4

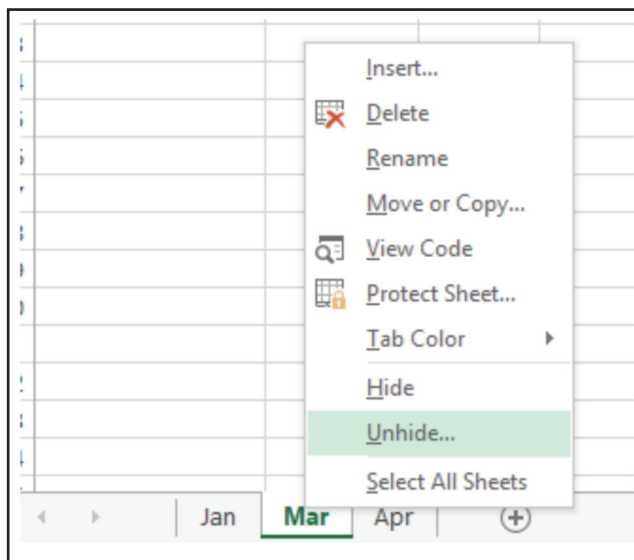
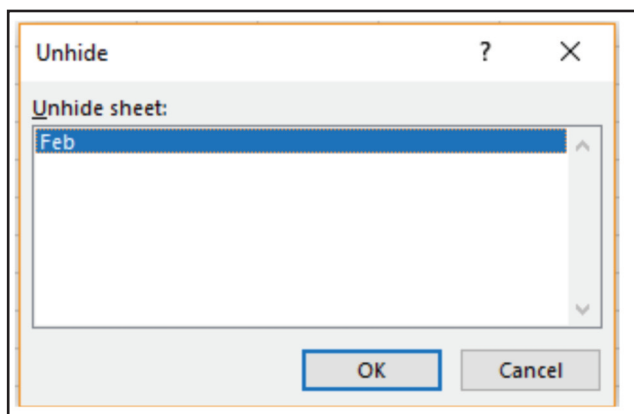


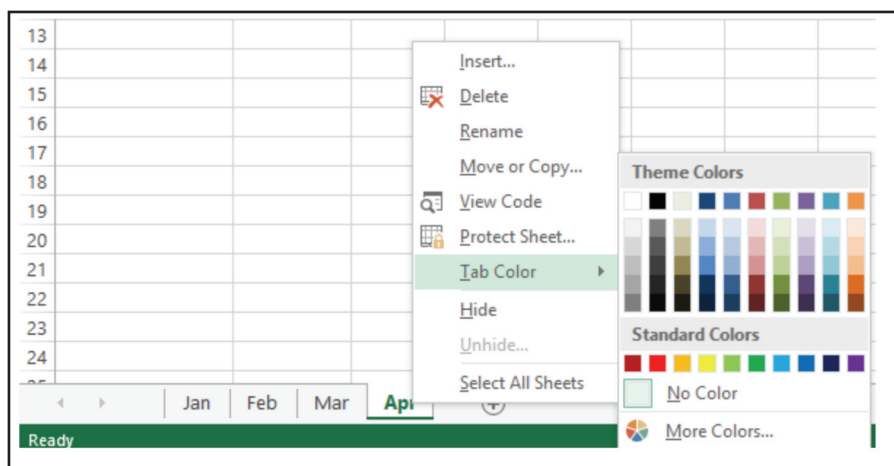
FIGURE 5



power to tabbed spreadsheets with several time-saving tricks. For dozens of free articles and hundreds of free videos on using Excel in a medical practice, please visit www.mooresolutionsinc.com. ■



FIGURE 6



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.

- According to Dave Jakielo, how often should you schedule marketing activities on your calendar?
 - Daily
 - Weekly
 - Monthly
 - Bi-monthly
- The most important signed document that a practitioner (billing client) should have with an out-of-network patient is a:
 - Financial policy
 - Assignment of benefits
 - Hardship waiver
 - Fee disclosure
- You have two tabs with the same name in Excel.
 - True
 - False
- Effective appeals come down to the appeal letter detail rather than the attachments.
 - True
 - False
- An effective appeal often requires:
 - Details of the appeal letter
 - Use of electronic form
 - Attached supporting documentation
 - Website submission
- Which of the following types of data is not one of the top 3 in the black market?
 - Bank account information
 - Date of birth
 - Social Security number
 - U.S. credit cards with track data
- Providing patient agreements and compliance forms to clients is an easy way to open your company up to liability.
 - True
 - False
- The average number of hours it takes for a physician and their staff to complete 37 PAs per week is:
 - 0
 - 2
 - 16
 - 30
- Which of the following is NOT a best practice designed to improve patient collections?
 - Document everything
 - Consistency
 - Compress the statement cycle
 - Create your own policy
- Providing transparent fees to your client will help you collect out-of-network fees later.
 - True
 - False