



Advanced Table Features

By Nate Moore, CPA, MBA, CMPE

The May–June 2012 issue of *Billing* introduced tables in Excel, a powerful tool to sort, filter, and organize data. The July–August 2012 issue of *Billing* added table design tricks, the totals row, and how to add rows and columns to a table. Now that you are familiar with the basic features of tables, this article adds several advanced features to your repertoire. To follow along with the data in this example, look for the download link with the May–June *Billing* article at mooresolutionsinc.com/articles.php. Refer to the May–June article if you need help creating a table with the sample data.

Sorting and Filtering by Color

If you read my article in the May–June 2012 issue of *Billing*, you are familiar with the sorting and filtering options in a table. The drop-down arrow at the top of each column provides options to sort in ascending and descending order as well as different filtering options. The key is that those options are based on the contents of the cells in the column. In Excel 2007 and 2010, you can also sort and filter by the way each cell is formatted.

Figure 1 is a good example of sorting by color. Notice that when the drop down box is selected and I hover over “Sort by Color,” Excel scans the column and recognizes that the column has a yellow fill color – fill is the cell’s background color – and a red font color. By selecting either a color or a no-color option, Excel will sort the column based on your selection.

Figure 2 shows a similar example using cell icons. Cell icons are also found in the “Sort by Color” or “Filter by Color” submenus. Notice that all three icons in the column are displayed when I click “Filter by Color.” Clicking on any of the three icons filters the table so that only cells formatted with the selected icon are displayed.

I added these icons to the *Balance* column using an Excel tool called “Conditional Formatting.” Conditional formatting

allows users to format each cell in an area based on the contents of that cell. In the *Balance* column, cells greater than or equal to \$1,000 have the red icon, cells greater than or equal to \$500 have a yellow icon, and cells less than \$500 have a green icon. We will discuss conditional formatting in a future *Billing* article. The point for this article is that by using conditional formatting to group the account balances, we can then filter by cell icon to only display the group of cells that we need to work on.

I work with an orthopedic practice that receives 120+ day downloads of A/R claims as Excel files. They use fill colors to track the staff members who have been assigned to work each claim. Once each claim has been assigned, it is easy for the administrator to get a report of each staff member’s claims simply by filtering by cell fill color. You can also use more complicated rules in the same manner. For example, you may use filters to assign an experienced staff member to all of the Blue Cross claims for a certain group of physicians along with other claims for other physicians that are over a certain balance or are past due. Once you have applied the filters to identify the claims for that staff member, simply change the cells’ font colors or fill colors so that you can sort and filter that staff member’s claims in the future.

Custom Sorting Options

All of the sorting options we have discussed so far will only sort one column at a time. If you want to sort by the *Balance* and then *Due From* columns, try using “Custom Sort.” Custom sort is available from the “Sort by Color” submenu, as shown in Figure 3. Selecting “Custom Sort” will bring up the “Sort” menu as shown in Figure 4. Notice that clicking “Add Level” tells Excel to first sort by the *Balance* column in a descending order and then to sort by the *Due From* column in an ascending order.

The “Delete Level” button allows you to delete a highlighted sorting level and the “Copy Level” button allows you to create a copy of an existing *(continued on page 50)*



FIGURE 1

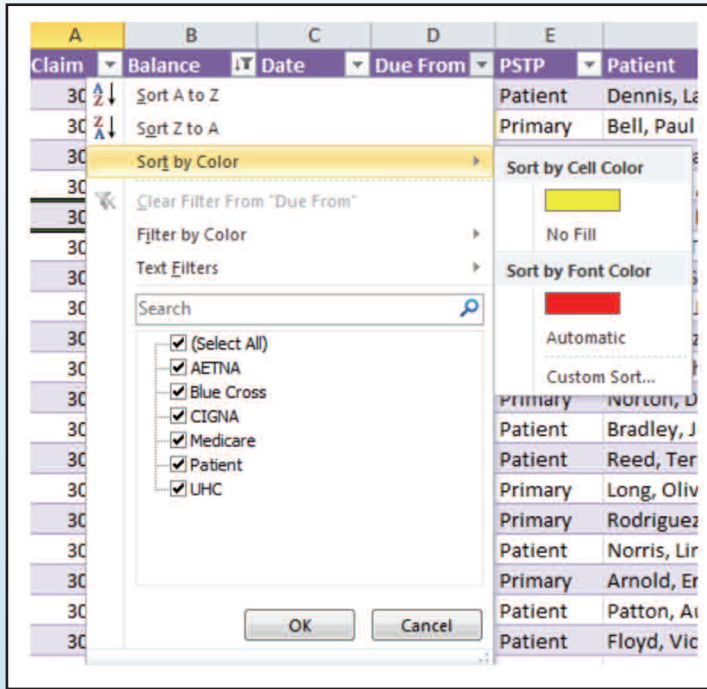


FIGURE 2

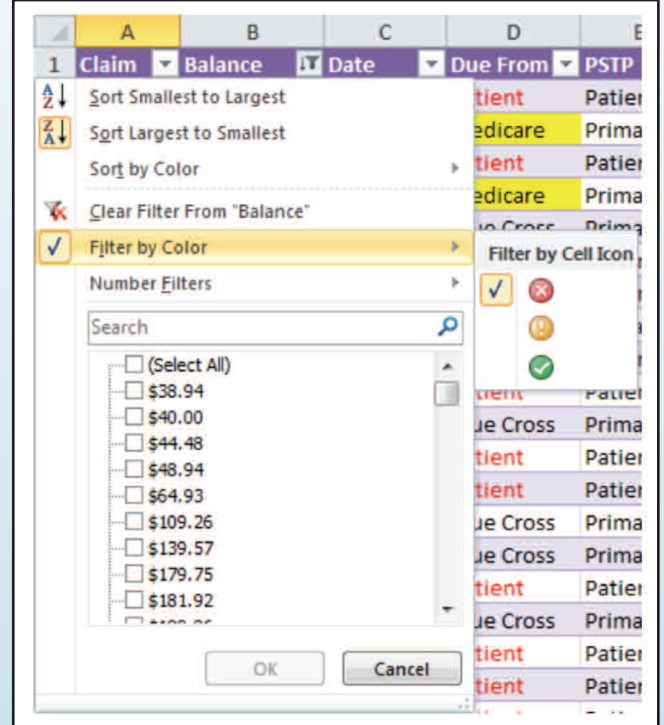


FIGURE 3

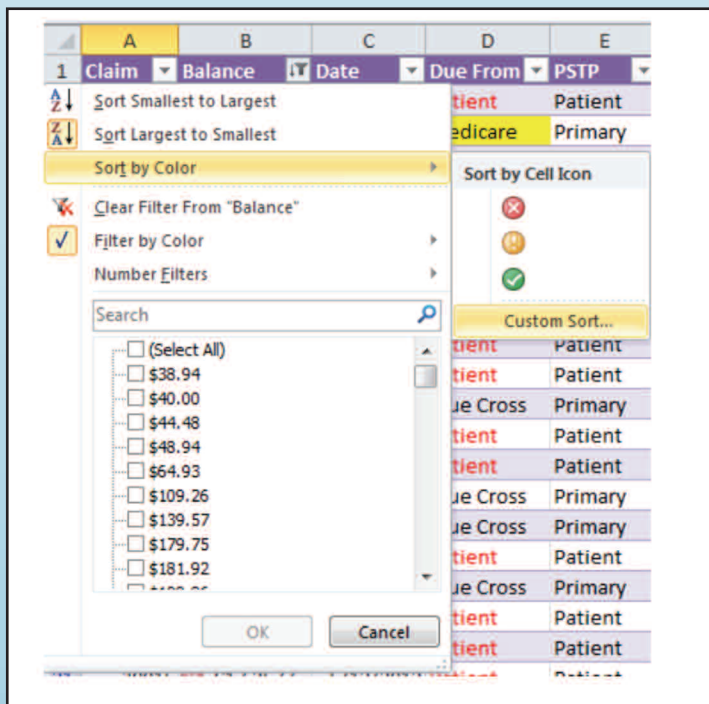


FIGURE 4

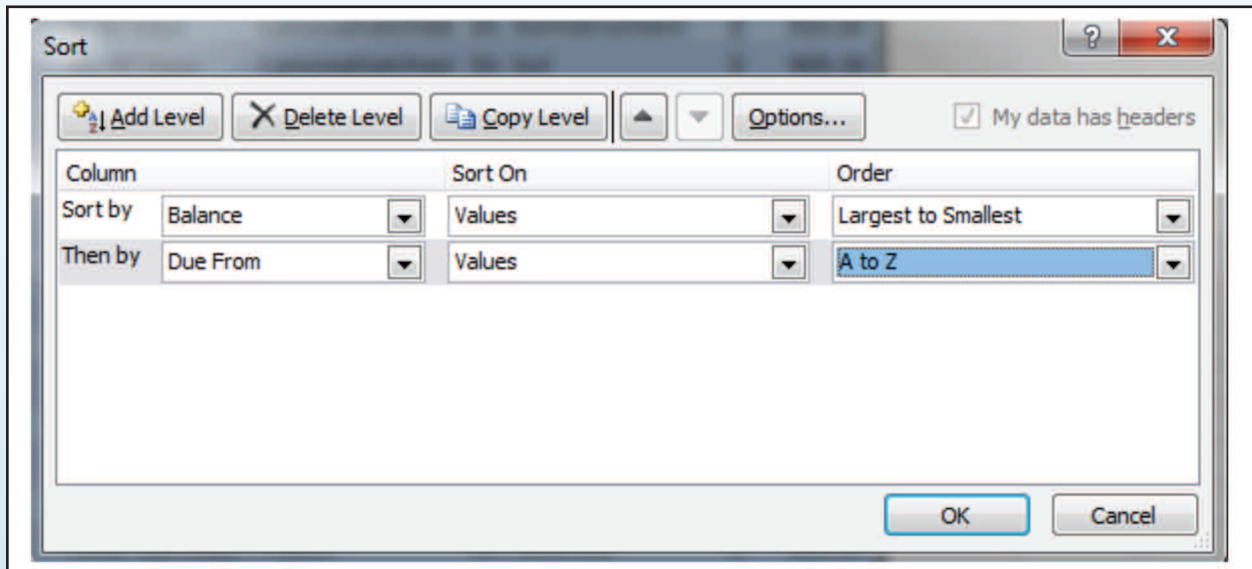


FIGURE 5

G3 fx ="=Over 120 Days"										
	A	B	C	D	E	F	G	H	I	J
1	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor	Expected
2		>1000								
3							=Over 120 Days			
4	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor	Expected
5	30071	\$ 1,997.75	10/5/2011	Patient	Patient	Dennis, Laverne	Over 120 Days	Myakka	Dr. Luce Del Sole	\$ 998.88
6	30089	\$ 1,966.98	5/11/2012	Medicare	Primary	Bell, Paul	0-30 Days	Caloosahatchee	Dr. Yang Guang	\$ 983.49
7	30085	\$ 1,894.70	5/8/2012	Patient	Patient	Hunt, Eleanor	0-30 Days	Myakka	Dr. Sonnenschein	\$ 947.35
8	30030	\$ 1,893.33	4/19/2012	Medicare	Primary	Chapman, Nicole	0-30 Days	Okeechobee	Dr. Yang Guang	\$ 946.67
9	30004	\$ 1,878.94	12/10/2011	Blue Cross	Primary	Lambert, Brian	Over 120 Days	Kissimmee	Dr. Luce Del Sole	\$ 939.47

FIGURE 6

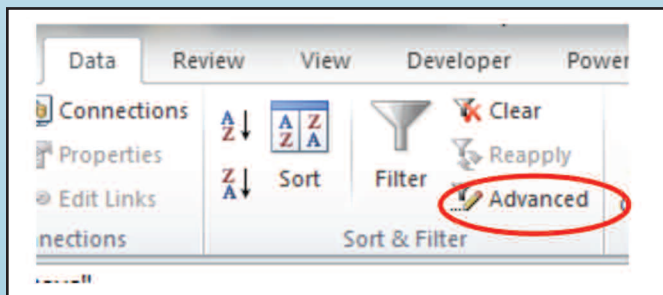




FIGURE 7

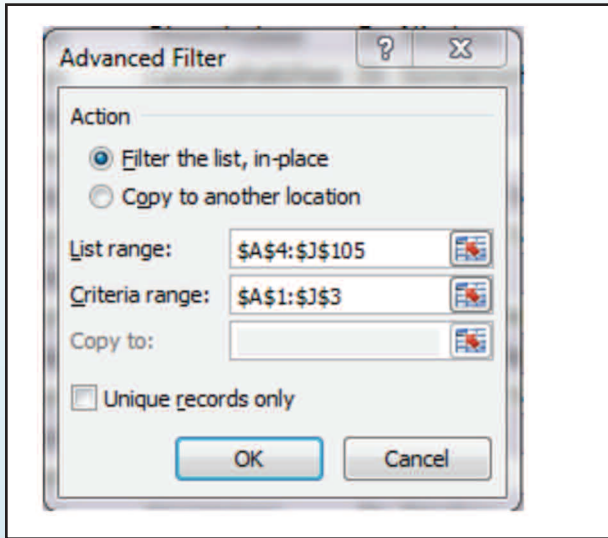


FIGURE 8

	A	B	C	D	E	F	G	H	I	J
1	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor	Expected
2		>1000								
3							=Over 120 Days			
4	Claim	Balance	Date	Due From	PSTP	Patient	Aging	Location	Doctor	Expected
5	30071	\$ 1,997.75	10/5/2011	Patient	Patient	Dennis, Laverne	Over 120 Days	Myakka	Dr. Luce Del Sole	\$ 998.88
6	30089	\$ 1,966.98	5/11/2012	Medicare	Primary	Bell, Paul	0-30 Days	Caloosahatchee	Dr. Yang Guang	\$ 983.49
7	30085	\$ 1,894.70	5/8/2012	Patient	Patient	Hunt, Eleanor	0-30 Days	Myakka	Dr. Sonnenschein	\$ 947.35
8	30030	\$ 1,893.33	4/19/2012	Medicare	Primary	Chapman, Nicole	0-30 Days	Okeechobee	Dr. Yang Guang	\$ 946.67
9	30004	\$ 1,878.94	12/10/2011	Blue Cross	Primary	Lambert, Brian	Over 120 Days	Kissimmee	Dr. Luce Del Sole	\$ 939.47
10	30067	\$ 1,839.06	5/12/2012	Patient	Patient	Greene, Terri	0-30 Days	Kissimmee	Dr. Ensoleillement	\$ 919.53
11	30073	\$ 1,835.69	4/19/2012	Patient	Patient	Hanson, Sheila	0-30 Days	Okeechobee	Dr. Nisshou	\$ 917.85
12	30010	\$ 1,821.60	4/18/2012	Medicare	Primary	Mendez, Joan	0-30 Days	Caloosahatchee	Dr. Sonnenschein	\$ 910.80
13	30041	\$ 1,818.56	3/4/2012	Patient	Patient	Rodriguez, Ada	61-90 Days	Caloosahatchee	Dr. Sol	\$ 909.28
14	30014	\$ 1,810.10	4/11/2012	Patient	Patient	Adams, Shawn	31-60 Days	Myakka	Dr. Nisshou	\$ 905.05
15	30037	\$ 1,799.94	4/3/2012	Blue Cross	Primary	Norton, Dewey	31-60 Days	Caloosahatchee	Dr. Luce Del Sole	\$ 899.97
16	30002	\$ 1,790.46	5/12/2012	Patient	Patient	Bradley, Jesse	0-30 Days	Caloosahatchee	Dr. Luce Del Sole	\$ 895.23
17	30024	\$ 1,783.68	3/20/2012	Patient	Patient	Reed, Terrell	31-60 Days	Peace	Dr. Sol	\$ 891.84
18	30007	\$ 1,759.90	5/2/2012	Blue Cross	Primary	Long, Olive	0-30 Days	Peace	Dr. Ensoleillement	\$ 879.95
19	30081	\$ 1,746.52	4/14/2012	Blue Cross	Primary	Rodriguez, Floyd	31-60 Days	Caloosahatchee	Dr. Ensoleillement	\$ 873.26

Unlike sorting, you can filter multiple columns at the same time by clicking the **drop-down arrow next to each column** and then selecting the appropriate filter.

sorting level. The up and down arrows to the right of the “Copy Level” button allow you to reorder the sorting levels as needed. The “Options” button will allow you to make your sorts case sensitive and to change the sorting from a left-right orientation to a top-bottom one.

Advanced Filtering Options

Unlike sorting, you can filter multiple columns at the same time by clicking the drop-down arrow next to each column and then selecting the appropriate filter. The catch with filtering multiple columns is that Excel assumes that the rows in the table have to meet every filtering condition to

be displayed. For example, if you filter the *Balance* column to display all claims over \$1,000 and the *Aging* column to display all claims over 120 days, a claim has to be *both* over \$1,000 *and* over 120 days to be displayed. If you want to display claims *either* over \$1,000 *or* over 120 days, you need to use Excel’s “Advanced Filter” feature.

Start by adding a few rows above your table using the “Insert” button on the “Home” ribbon tab, as shown in Figure 5, to make a criteria area. Now, copy the column headings from the table to the first row in the criteria. Then, enter as many filters as you need to in the criteria area. Each row represents criteria that must all be true. If you

have more than one row of criteria, Excel looks for data where all of the first row's criteria are true *or* where all of the second row's criteria are true, and so on. Be careful not to include a blank row of criteria in your criteria range, or Excel will select all of the records in your table since all records meet the blank criteria.

Note the syntax for the criteria cells. To select all claims where *Balance* is greater than \$1,000, I enter “>1000” as the criteria in the *Balance* column. To select all claims where *Aging* is over 120 days, I enter “=Over 120 Days” in the *Aging* column. You can enter a variety of different formulas in the criteria area as long as Excel can calculate whether the criteria equal true or false. Wildcards (?) and (*) also work in these formulas.

Now that your spreadsheet is ready, “Advanced Filters” is in the “Sort and Filter” section of the “Data” ribbon tab, as shown in Figure 6. You can either filter the data in place or create a filtered copy of the data in another location. “List range” is the table you want to filter. “Criteria range”

is the area above the table with the filter criteria. Figure 7 shows the completed Advanced Filter window, and Figure 8 shows the filtered table. If you follow along with the example, once you get this filter to work, try adding other criteria and additional rows to the criteria range. Go back to the Advanced Filter window, make sure the criteria range includes all of your criteria, and click OK to apply the advanced filter settings.

Tables are a fantastic way to organize detailed data like accounts receivable or upcoming patient appointments. To learn more about tables, watch the free playlist for tables, Excel Videos 30–43, at kelapro.com/videos.php. ■

Nate Moore, CPA, MBA, CMPE speaks, consults, records, and writes about Microsoft Excel and data mining in medical practices throughout the country. His free Excel Videos have been viewed well over 100,000 times and available at mooresolutionsinc.com and kelapro.com. Like PivotTableGuy on Facebook and follow PivotTableGuy on Twitter to be notified each time a new Excel Video is released.