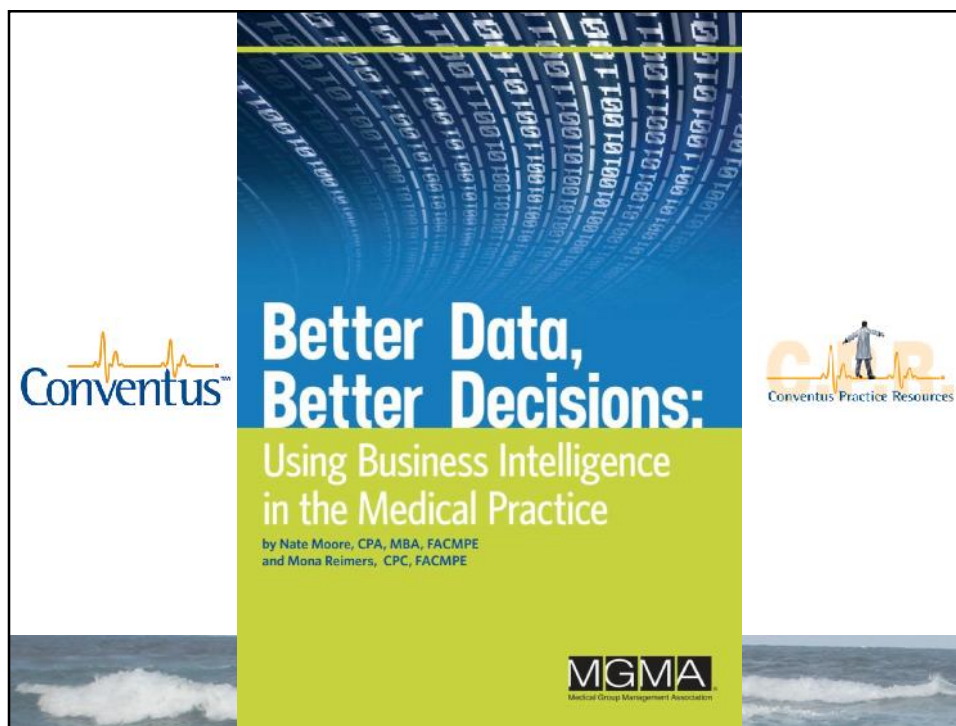




1

Technical Assistance



- Technical Assistance Telephone Number:
 - 732 – 822 – 9948
- Question Submission for Q&A Session:
 - Type your question into the Questions box on the control panel on your screen

(PLEASE JOT DOWN THIS INFORMATION)



2

Conventus Practice Resources

- **2015 Webinar Series**
 - Theme: “The Business & Quality of Medicine – Walking the Tightrope”
- **Onsite Services**
 - C.A.R.E. Certification Program
 - EHR Consultations
 - Office Risk Assessment Consultations
- **Conventus Practice Hotline – 24/7**
- **E-Technologies & Strategic Partnerships**
- **Free Online CME**
- **E-Publications**
- **Practice Management Resources** – “For Everyday Issues”



3

3

Turning Numbers



Nate Moore MBA, CPA, FACMPE

Nate Moore, CPA, MBA, FACMPE speaks, consults, records, and writes about business intelligence in medical practices throughout the country.

Nate's first book, *Better Data, Better Decisions: Using Business Intelligence in the Medical Practice*, co-written with Mona Reimers, was recently published by MGMA.

Nate's consulting focuses on using SQL to mine and leverage medical practice data into actionable knowledge.



4

Into Knowledge



4

Carving Up and Drilling Down: Using Microsoft Excel's® Pivot Table Feature to Analyze a Practice's Revenue Cycle

5



5

Learning Objectives

- Create a Pivot Table using sample medical practice data
- Filter, Sort, Group, and Pivot to analyze data
- Discover multiple applications for Pivot Tables in a medical practice

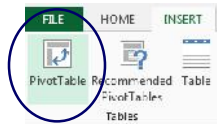
6



6

Create a Pivot Table from sample Excel Data (Collections)

Create a Pivot Table from the Insert tab (Excel 2013 also has Recommended Pivot Tables)



7

7

Create a Pivot Table from sample Excel Data (Collections)

Add and remove rows and columns using the Pivot Table Field List



8

8

Create a Pivot Table from sample Excel Data (Collections)

Double click any value in the Pivot Table to drill down to detail

Date	Amount	Payer	Payor Type	State	Referring Physician	Location	Doctor	Dx	Patient	Code
7/24/2013	690.12	AETNA	Primary	CA	Dr. The Wizard and I	Jacksonville	Dr. Velet	Shoulders	Carson, Emma	34557
7/27/2013	940.06	AETNA	Primary	CA	Dr. Dancing Through Life	Jacksonville	Dr. Map	Ears	Nunez, Claire	81135
6/5/2013	332.52	AETNA	Primary	CA	Dr. Dear Old Shiz	Jacksonville	Dr. Florida	Eyes	Cruz, Carrie	94815
12/4/2013	546.93	AETNA	Primary	WA	Dr. I'm Not I hat Girl	Jacksonville	Dr. Florida	Mouth	Castro, Saul	41673
3/23/2013	200.02	AETNA	Primary	CA	Dr. Defying Gravity	Jacksonville	Dr. Jailor	Mouth	Drake, Brandon	37131
2/5/2013	274.69	AETNA	Primary	CA	Dr. What Is this Feeling	Jacksonville	Dr. Jailor	Ears	Pena, Pearl	41579
4/4/2013	673.75	AETNA	Primary	CA	Dr. Dancing Through Life	Jacksonville	Dr. Florida	Knees	Ford, Rufus	56155
7/27/2013	290.35	AETNA	Primary	CA	Dr. Dear Old Shiz	Jacksonville	Dr. Florida	Head	Walters, Edmund	50593
3/22/2013	905.4	AETNA	Primary	AZ	Dr. I'm Not I hat Girl	Jacksonville	Dr. Map	Nose	Mitchell, Christie	46115
2/3/2013	425.37	AETNA	Primary	WA	Dr. Dancing Through Life	Jacksonville	Dr. Piano	Head	Vasquez, Delores	27023
5/1/2013	935.05	AETNA	Primary	CA	Dr. Popular	Jacksonville	Dr. Jailor	Eyes	Reynolds, Bradley	38256
10/11/2013	55.34	AETNA	Primary	CA	Dr. I'm Not I hat Girl	Jacksonville	Dr. Velet	Mouth	Curtis, James	76012
7/2/2013	793.71	AETNA	Primary	CA	Dr. Defying Gravity	Jacksonville	Dr. Velet	Ears	Peters, Phillip	43561

9

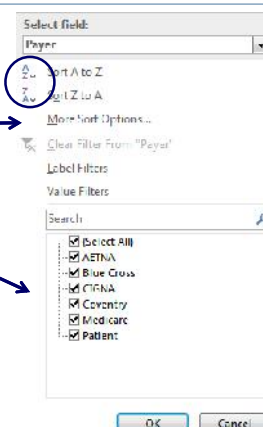
9

Filter and Sort Data (Collections)

- Sort A-Z and Z-A

- Manual sort

- Basic manual filters

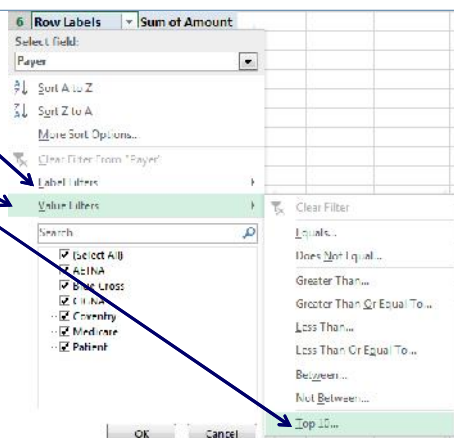


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10

Filter and Sort Data (Collections)

- Label filters
- Value filters
- Top x value filter

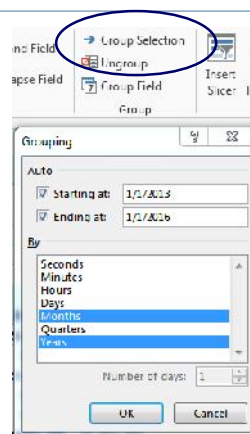


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11

Pivot and Group Data (Reimbursement)

Group and ungroup items and dates

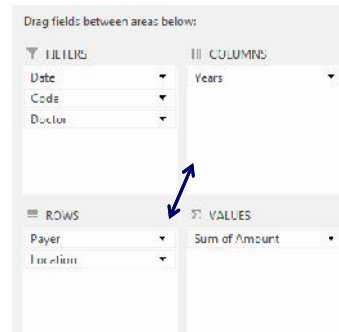


12

12

Pivot and Group Data (Reimbursement)

Pivot rows and
columns by
dragging in Pivot
Table Field List

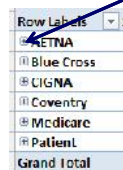


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Pivot and Group Data (Reimbursement)

Collapse and expand groups with and
without +/- buttons

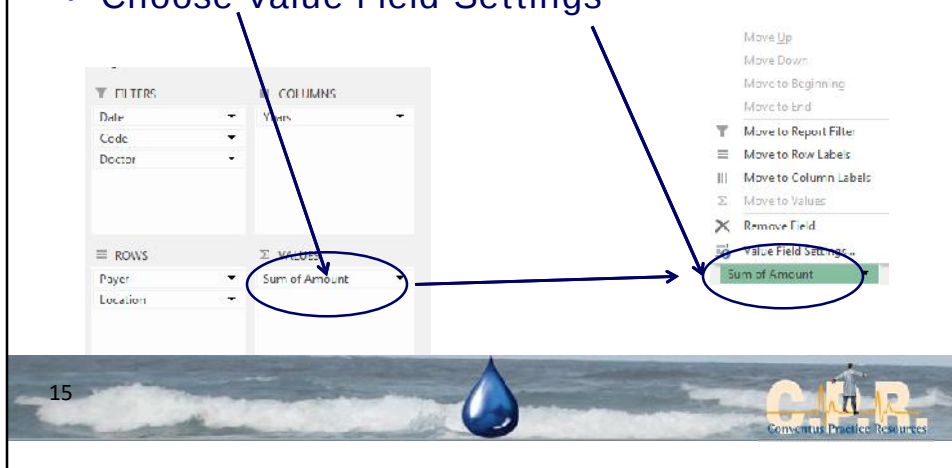


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Generate Pivot Table Calculations (Reimbursement)

- Right-click in values area (Sum of Amount)
- Choose Value Field Settings



15

Generate Pivot Table Calculations (Reimbursement)

- Sum, count, average, max, min in values area (Summarize Values By)
- % of row/column, difference between columns, etc. (Show Values As)

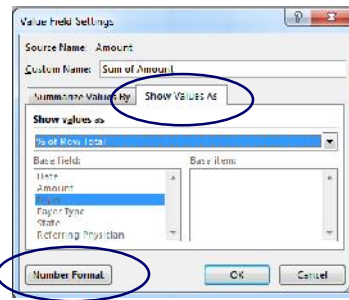
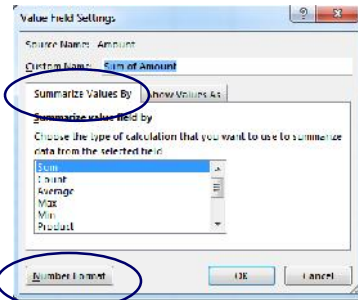


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Generate Pivot Table Calculations (Reimbursement)

Summarize Values By
(sum, count, average)
OR

Show Values As (% of row,
% of column, difference)

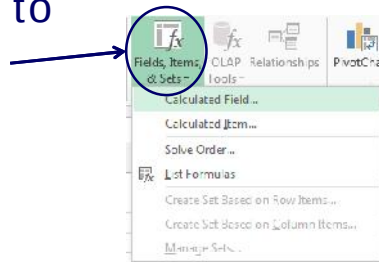


17

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Generate Pivot Table Calculations (Reimbursement)

Add calculated fields to
a Pivot Table here

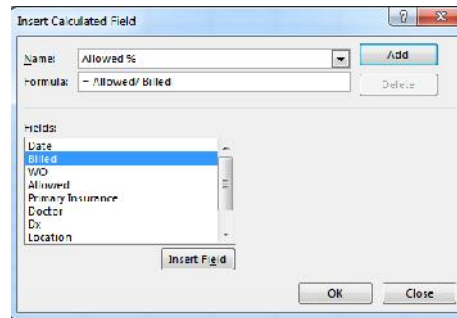


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Generate Pivot Table Calculations (Reimbursement)

Use calculated fields to make calculations inside the Pivot Table based on Pivot Table fields



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Generate Pivot Table Calculations (Reimbursement)

GETPIVOTDATA

Formulas referencing Pivot Table Cells

Always references the exact cell in the formula

Cell reference changes when you copy the cell

Complicated formula, hard to copy and paste

Standard Excel formula makes it easy to copy and paste

Doesn't change as data is added to a Pivot Table

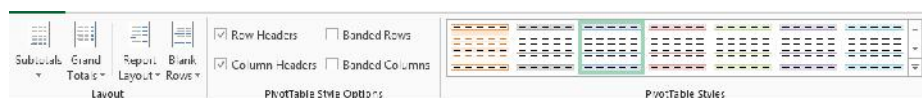
Needs maintenance as data is added to a Pivot Table

20

20

Understand Pivot Table Design Options (Last Referral)

- Styles
- Band (shade) rows and columns
- Report layout options
- Subtotals and grand totals



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Introducing Pivot Charts (EM Data)

- Create Pivot Charts from existing Pivot Table data
- Create Pivot Charts from scratch



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22

Discover Multiple Applications for Pivot Tables in a Medical Practice

Billed Charges
Collections
Accounts Receivable
Claim Denials
and...

23



23

What Information can we Discover from a Billed Charges Pivot Table

Payer Mix
E&M Coding Utilization
Productivity by Provider, Location, etc.
Monthly & Yearly Trends
and...

24



24

Next Steps

Watch Excel Videos

Pivot Tables (Videos 1-29 and 280-330)

mooresolutionsinc.com/videos.php

Article on Pivot Tables

mooresolutionsinc.com/articles.php

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Questions?



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Nate Moore



MooreSolutionsInc.com



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