



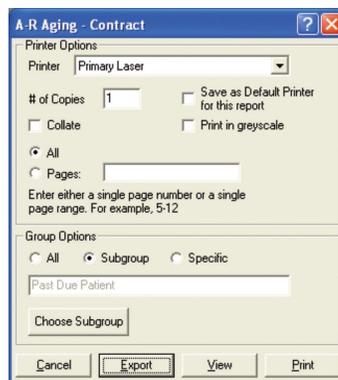
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# Excel Gurus, Take Note!

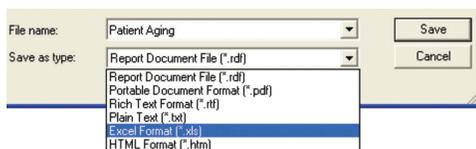
by **Natalie Beaton**

For those of you who were using Microsoft® Excel® spreadsheet software before you learned how to write your name, you will be excited to find out that ViewPoint will allow you to export the data from any report into Excel format. You can then go into the Excel report and work your magic. For many of you who are presently keeping separate Excel tracking sheets, this may eliminate quite a bit of work as well.

When you go into Practice Reports from the ViewPoint main menu, you pick the report you would like to run. If you need to use a subgroup you do that next. You will then see the report output option screen. Instead of choosing View or Print, you will click Export.



At this point you will need to name your file and indicate that the type of format you would like it to be saved in is Excel. Then click Save.



You can now open your new report in Excel and the fun can begin! There will be a little work in cleaning out the page headings, but once this is done you can sort the columns properly and take advantage Excel's features.

Just a few examples of reports I have been playing with in Excel include the following:

1. Run the New Patient Tracking report and have Excel sort by status alphabetically. You can then quickly count

how many of the new patients went into each status and figure your conversion ratio.

2. Run the A-R Aging by Contract for patient accounts with an amount due greater than zero. Once you are in Excel you can then sort the amount due column so that the list starts with the patient who owes you the greatest amount of money and work through the list from there. This is equally effective with insurance past due accounts.
3. If you are re-designing your scheduling grids, you can save your Procedure Length Summary by month for the previous six months and create a spreadsheet that let's you see your use of each procedure. This allows you to build a grid that includes accurate count information.

I'm sure those of you with the "Excel gift" will think of many more ways this feature can be used. Enjoy! ☺

## About the Author



Natalie Ann Beaton is a Practice Management Consultant for ViewPoint offices. She focuses on developing consistency and making maximum use of available technology. She can be reached at [joyfulchange@comcast.net](mailto:joyfulchange@comcast.net). Other articles from Ms. Beaton can be found in the Practice Resources section of [www.ortho2.com](http://www.ortho2.com).

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