

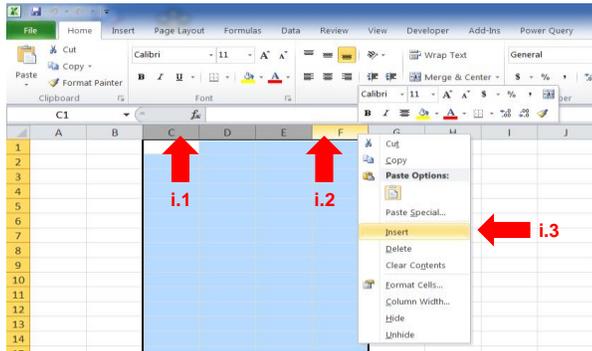
## Text-to-Columns - Patient Names

Sometimes patient lists come to us with data combined in one column when we need it in two separate columns. Use the Excel Text To Columns feature to separate the data into multiple columns.

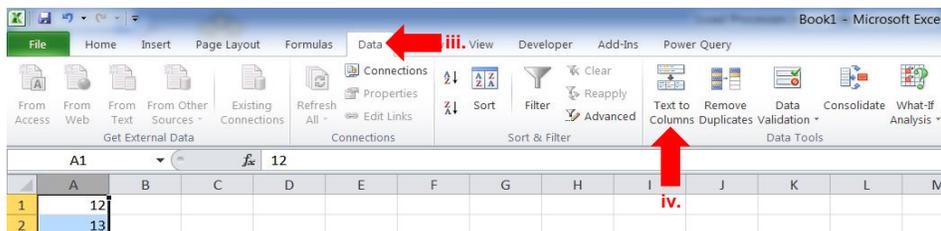
### Format the Patient Names

Sometimes the patient names are not split into a first name and last name. In this case, we have to separate the names into a first and last name. If the patient names are already split into two columns you can skip to the Put the Scrubbed Data into the load spreadsheet section.

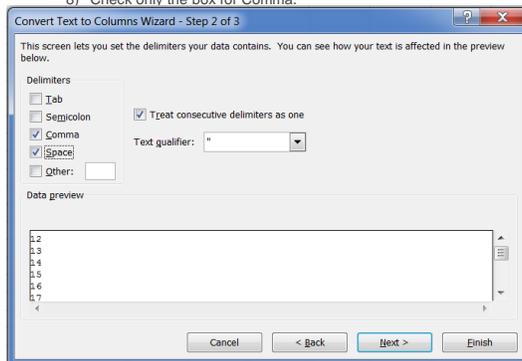
- 1) If the names column has the first and last name combined, click on the column to the right of the patient names column. Otherwise, skip to step 18.
- 2) Right-click.
- 3) Click insert.
- 4) Insert about 5 columns.



- 5) Highlight the column that contains the patient names.
- 6) Click Data.
- 7) Click the Text to Columns button.



- 8) Check only the box for Comma.

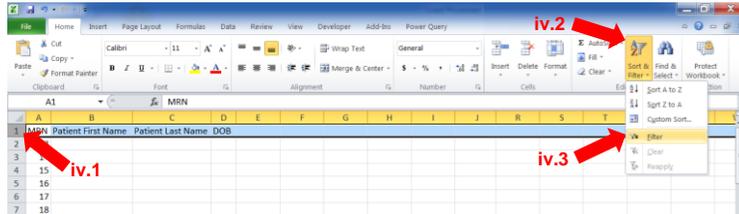


- 9) Click Next.
- 10) Click the Finish Button.
- 11) You should now have the names separated into two different columns.
- 12) Now you will need to remove the leading space in the first name column.
- 13) Click on the column to the right of the patient names column.
- 14) Right-click.
- 15) Click insert.
- 16) Click in the top cell.
- 17) Type in the formula =Trim(B2) where B2 is the cell where the patient's first name was entered.
- 18) Click on the Column to the right of the First Name (given name) column.
- 19) Right-click.
- 20) Click Insert.
- 21) Highlight the column title First Name.
- 22) Click Data.
- 23) Click Text to Columns.
- 24) Check only the box for Space.
- 25) Click Next.
- 26) Click the Finish Button.
- 27) You should now have the middle initials separated into their own columns.
- 28) Title this column Middle Name.
- 29) Leave the other columns
- 30) Repeat steps 18-26 for the Last Name column.

- 31) You should now have any name suffixes separated into their own columns.
- 32) Title this column Name Suffix.
- 33) Make sure the Patient Last Name column is titled correctly.
- 34) Make sure the Patient First Name column is titled correctly.
- 35) Click File.
- 35) Click Save.

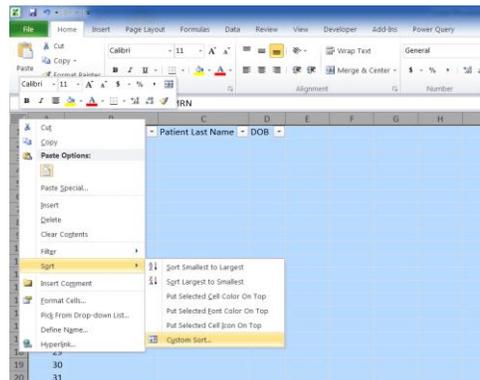
Now any patient with multiple word last names should have text in the next column(s) over, as well as any suffixes  
iv. Remove All Suffixes

1. Highlight the top row of the entire sheet
2. Click Sort & Filter
3. Click Filter
4. In the first column to the right of the last names, click the down arrow at the top of the column
5. Uncheck the box for '(Select all)'
6. Check the box to the left of all last names in parantheses, and titles such as DDS, II, Jr, MD, Sr, etc. Click the "OK" button.
7. Highlight these in the column, right-click and select "Clear Contents" from the menu
8. Clear the filters



b. Piece Back Together Multi-Word Last Names

- i. Click the down arrow to use the filters on the columns to the right of the last names to see which columns have text in them
- ii. Right-click in the top, left corner to select the entire sheet.
- iii. Click Sort.
- iv. Click Custom Sort.



v. Clear any existing conditions and sort by the columns that have text from patients' last names

1. Sort by the right-most column first, down through to the column with all last names. Usually this is 2 or 3 columns
2. Order them all "A to Z"
3. Click the "OK" button

vi. Now the last names with the most words should be at the top of the spreadsheet, and as you work down they should have fewer words.

vii. In the cell to the right of the last part of the name, use the following equation  

$$=([cell\ of\ 1st\ last\ name\ column] \& " " \& [cell\ of\ 2nd\ last\ name\ column] \& " " \& [cell\ of\ 3rd\ last\ name\ column])$$
 e.g. =(E2&" "&F2&" "&G2)

viii. Copy the formula down for all rows with the same amount of words in the last name

ix. Repeat for last names with 2 words, ending the formula after the 2nd last name column  
 e.g. =(E2&" "&F2)

x. Highlight the cells with the equation piecing together the names, copy and values-paste them back into the designated Last Name column

c. Delete the extra columns that were added for this step

- i. Click and hold the top of the Last Name Column, then drag to the right until you have highlighted all the extra columns.
- ii. Right-click on one of the highlighted columns. Click Delete

d. Make sure the column header shows it is for Patient Last Names

e. Properly format the First Names

- i. Follow steps a. through d. above for the First Names column

**2) When Patient Name is in one column "Last Name, First Name" format**

a. Right-click and insert several columns after the column with patient names

- i. Click and hold the top of the Name Column, then drag to the right to highlight several columns.
- ii. Right-click on the top of the Name column.
- iii. Click Insert.

iv. Inserting 5 columns should be sufficient, if not, undo back to this step and add additional columns

b. Separate the First and Last Names

- i. Highlight the column of names
- ii. Click Data, Click the Text to Columns feature
  - a. Select the 'Delimited' option, then click 'Next'
  - b. Check only the box for 'Comma'
  - c. Click Next.
  - d. Click the 'Finish' button.

iii. Now the last names should be in the original column, and the first names should be in the column to the right with a space in front of the first name.

c. Properly Format the First Names

- i. Highlight the column of First Names
- ii. Click Data, Click the Text to Columns feature
  - a. Select the 'Delimited' option, then 'Next'
  - b. Leave the box for 'Comma' checked and also select the checkbox for 'Space'
  - c. Click 'Finish'

- iii. Now the first names should be in the next column over, and any middle initials/names will be in the neighboring columns
- iv. Filter on the column to the right of the first names to show all options but "Blank."
- vi. Highlight the columns with middle names/initials from the spreadsheet
- vii. Right-click and chose Clear Contents.
- viii. Clear all Filters.
- ix. Title the column of first names "Patient First Name"
- d. Properly Format the Last Names
  - i. Repeat steps c.i through c.viii above for the last names.
  - ii. Make sure the column header shows it is for Patient Last Names
- e. Remove all empty columns added while formating the names