

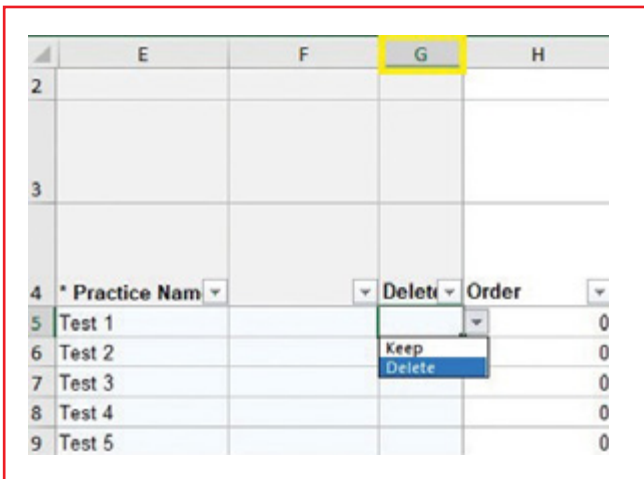
MGMA SURVEYS | EXCEL HELP

TIPS FOR A SUCCESSFUL SURVEY UPLOAD

1. **Always use the provided Excel template** – The most important thing to remember if you are completing an MGMA survey in Excel is to make sure the Excel template is in the most current format for the current survey year. You can ensure this by downloading the Excel from within the survey platform using the Excel button in the top right-hand corner.



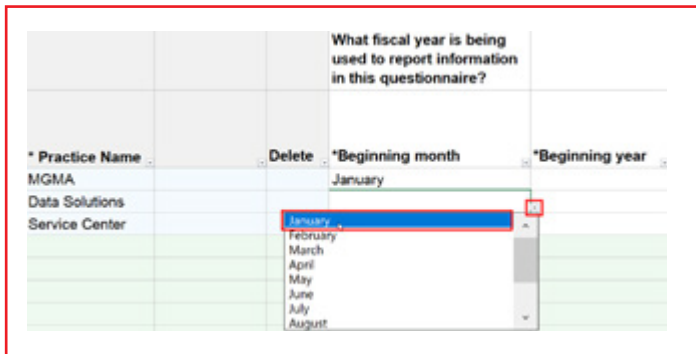
- Custom Excls that you have created, Excel templates from previous years, etc. are not recognized formats and will cause errors when uploading.
2. **Deleting pre-filled data from Excls** – Although the protected Excel worksheet may appear to be a barrier, it exists to protect the quality and validity of the data. If you have chosen to pre-fill your survey and want to remove pre-populated individuals or practices, select “Delete” in column G for the row you would like to remove and upload your Excel for these changes to take place. While you are unable to make any changes to columns A-G, you are still able to copy and paste in the remaining cells. Please see below for copy and paste formatting.



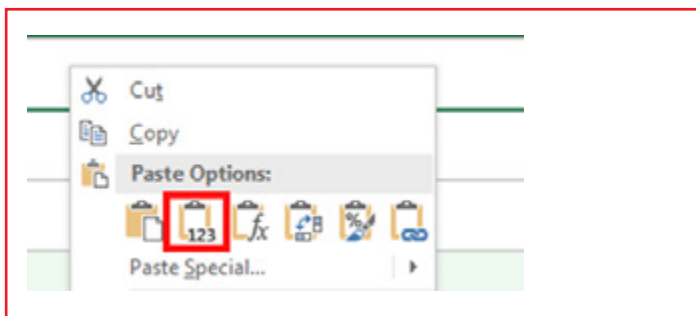
| | E | F | G | H |
|---|-----------------|---|--------|-------|
| 2 | | | | |
| 3 | | | | |
| 4 | * Practice Name | | Delete | Order |
| 5 | Test 1 | | | 0 |
| 6 | Test 2 | | | 0 |
| 7 | Test 3 | | | 0 |
| 8 | Test 4 | | | 0 |
| 9 | Test 5 | | | 0 |

** Please note while surveys are open we receive high volumes of Excel files and questions. Please allow 24 to 48 hours for a response and plan accordingly with survey open and close dates.*

3. **Use provided drop-downs** – Survey questions can be answered with drop-down menu options or open text responses, depending on the question. If a drop-down menu appears in the cells of the Excel survey, please make sure the answer you select is highlighted in the drop-down menu. If these values are not selected, your data may not upload.



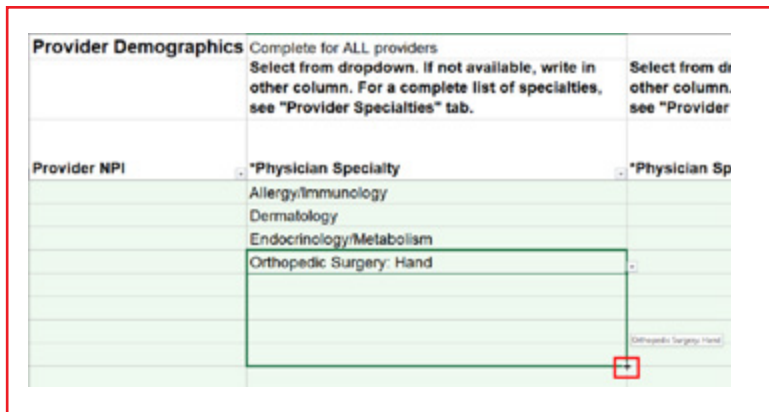
4. **Ensure proper formatting is used** – Answering Excel survey questions with equations is not supported and will cause errors when uploading. Please only enter appropriate values or selected drop-down options.
 - Copying and pasting values with formatting or formulas can cause upload errors. If you are transferring data from another spreadsheet into the MGMA Excel template, be sure to use a copy and paste+special function (see screenshot below) to appropriately transfer the cell values, and not formulas. Right-click into the cell you are pasting, and under “Paste Options”, select the 123 icon.



- Text values in numeric fields or numeric values in text fields will cause errors.
- Responding with N/A will also generate an error. If you do not collect or cannot answer the question, please leave the question blank unless there is an option for none or not applicable in the drop-down.

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- To quickly copy the same value to multiple cells, hold Ctrl on your keyboard and hover over the bottom-right corner of the cell you want to copy. You should see two plus signs appear. Drag the plus signs over all cells that should hold this value.



5. **Use unique practice, provider and staff names** – Rows where practice name, provider name or staff name are left blank will not be uploaded. Practice names, provider names and staff names must be unique or it will cause errors when uploading. Please ensure your practices’ and employees’ names are unique identifiers such that they differ from each other and so that you will be able to identify them. For example, if Practice ABC has 5 providers: A, A, B, C, and D, you will need to update one of the “A” providers to be a unique name such as A_2.

FOR MORE INFORMATION ON COMPATIBILITY IN A PROTECTED EXCEL FILE, PLEASE SEE THE MGMA SURVEY PARTICIPATION FAQ.

STILL NEED HELP?

If you’re still receiving error messages, please send your Excel file, along with the ID you’re logged in under, and a screenshot of the error to survey@mgma.com, and we’ll be happy to assist you further.

If you have additional questions about participation, MGMA Data Solutions staff are available Monday through Friday, 7:00 am to 5:00 pm MT. Call toll-free at **877.275.6462**, ext. 1895 or email survey@mgma.com.

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