

Revised Focused Excel Dashboard Plan for SHIF/SHA





Overall Objective (Unchanged)

To provide a **clear, dynamic, and actionable view** of SHIF/SHA program performance using Excel dashboards, helping stakeholders identify trends and make data-driven decisions.

Recommended Dashboards (Only 3 Key Dashboards)

1. Core Member & Financial Overview Dashboard (Merge of Demographics + Financials)

Key Visualizations:

-  **Pie Chart:** Distribution of members by income level
-  **Stacked Column:** Members by employment status or subsidy status across regions (choose one for simplicity)
-  **Line Chart with Moving Average:** Monthly contributions with trend
-  **Gauge or Bar Chart:** Actual vs. target contributions by month

Learning Focus for You:

- PivotTables for income/employment groups
 - Simple **SUMIFS**, **AVERAGEIFS**, and **XLOOKUP**
 - Conditional formatting + Slicers for region/time filters
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2. Healthcare Utilization & Claims Dashboard (Combined Use + Claims View)

Key Visualizations:

- 📌 **Treemap or Heatmap:** Utilization by service type
- 📌 **Scatter Plot:** Healthcare cost vs. coverage (highlight outliers)
- 📌 **Combo Chart (Dual Axis):** Claim amounts and approval rates over time
- 📌 **Donut Chart:** Claim status (Approved, Pending, Rejected)

Learning Focus for You:

- Power Query basics to clean/utilize healthcare + claims data
- Use dynamic ranges and **FILTER()** for service types
- Add interactivity with dropdowns/slicers

3. Summary Executive Dashboard

Key Visualizations:

- 📌 **KPI Cards:** Total members, % subsidized, Avg. contribution, Avg. utilization, Claim approval %
- 📌 **Trendline (Sparkline or Mini-Charts):** Key metric performance over time
- 📌 **Navigation buttons:** Link to other dashboards

Learning Focus for You:

- Use named ranges + **LET()**, **IFERROR()**, **TEXT()** to build clean summaries
- Apply slicers to control whole dashboard

Technical Simplifications & Upskilling Path

Feature

Keep/Remove

Upskill Focus

Power Query	✓ Keep	Start with data cleaning steps (remove blanks, rename, types)
PivotTables	✓ Keep	Learn to build PivotCharts and link with slicers
3D Maps, Radar, Timeline, Waterfall, etc.	✗ Remove	Too complex/low impact right now
Calculated Fields	✓ Keep	Use IF, SUMIFS, AVERAGEIFS, XLOOKUP
Form Controls	✗ Skip for now	Replace with slicers/dropdowns
Conditional Formatting	✓ Keep	Use for highlighting high/low values
Navigation Buttons	✓ Keep	Simple shape with hyperlink is enough

Suggested Learning Steps for Excel Upskilling

1. Master PivotTables & PivotCharts

- Filter by slicer, group dates, custom calculations

2. Learn Power Query Basics

- Import, clean, reshape, and append datasets

3. Practice Key Functions

- XLOOKUP, FILTER, IF, SUMIFS, AVERAGEIFS, LET

4. Create Clean Dashboards

- Consistent layout, slicers, title with =TEXT(TODAY(), "mmm yyyy")