

✓ Revised Focused Power BI Dashboard Plan for SHIF/SHA

🎯 Overall Objective (Unchanged)

Deliver a clear, interactive, and responsive Power BI report that visualizes the most relevant KPIs of the SHIF/SHA program, enabling stakeholders to monitor trends, identify gaps, and make timely decisions.

📊 Recommended Report Pages (3 Key Dashboards Only)

1. Core Member & Financial Overview Page

Key Visuals:





- 📊 **Donut Chart:** Members by income level
- 📊 **Stacked Column Chart:** Employment status *or* subsidy status by region
- 📊 **Line + Rolling Avg:** Monthly contributions (with trendline or rolling average using DAX)
- 📊 **Gauge or Bar Chart:** Actual vs. target monthly contributions

Learning Focus for You:

- Use **basic DAX measures** (SUM, AVERAGEX, CALCULATE)
 - Build **slicers** for region, income, and month filters
 - Practice **data modeling** with relationships between tables (e.g., Members ↔ Contributions)
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2. Healthcare Utilization & Claims Page

Key Visuals:




-  **Treemap or Matrix Heatmap:** Utilization by service type
-  **Scatter Plot:** Coverage vs. total healthcare costs (with tooltips showing member info)
-  **Combo Chart (Dual Axis):** Claim amount & approval rate over time
-  **Donut or Stacked Column:** Claims by status (Approved, Pending, Rejected)

Learning Focus for You:

- Create **DAX calculated columns/measures** for cost gaps, claim rates
 - Learn **tooltips**, **bookmarks**, and **conditional formatting** for visual emphasis
 - Use **Power Query** in Power BI to clean and merge datasets
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3. Executive Summary Page

Key Visuals:

-  **KPI Cards:** Total Members, % Subsidized, Avg. Contribution, Avg. Utilization, Approval Rate
-  **Mini Line Charts:** Time trends for each KPI
-  **Buttons or Tabs:** Navigate to detailed dashboards

Learning Focus for You:

- Build **dynamic summary cards** with DAX (**COUNTROWS**, **DIVIDE**, **IF**)
 - Learn **page navigation**, **slicer sync**, and **bookmarks**
 - Practice layout and branding for a clean, print-ready page
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Technical Simplifications & Upskilling Plan

Feature/Element	Keep/Remove	Upskill Focus
Power Query (M)	✓ Keep	Clean/reshape tables before loading
DAX Basics	✓ Keep	SUM, CALCULATE, IF, DIVIDE, AVERAGEX
Complex Charts (e.g., Radar, Timeline)	✗ Remove	Not essential; visually noisy
Relationships/Data Model	✓ Keep	Master 1-to-many, filtering behavior
Tooltips, Filters, Slicers	✓ Keep	Use to add interactivity
RLS, Paginated Reports	✗ Skip for now	Advanced; not needed initially
Drill-through & Bookmarks	✓ Optional	Useful for advanced navigation

Suggested Power BI Upskilling Path

1. **Learn Data Modeling**
 - Understand relationships, cardinality, filter directions
2. **Practice Power Query**
 - Remove blanks, format columns, merge/join tables
3. **DAX Essentials**
 - CALCULATE, SUMX, IF, DIVIDE, FILTER
4. **Design Effective Reports**
 - Use consistent fonts, whitespace, aligned visuals
 - Avoid over-cluttering; aim for *1 screen = 1 story*

5. Interactivity

- Use slicers, synced filters, tooltip pages, and bookmarks
- Try exporting clean visuals to PowerPoint/PDF for sharing