KIND Community Standards: Excel

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Excel workbooks are frequently troublesome. This document contains a simple check-list to avoid the most serious problems found in Excel files in health and care.

Basic standard for Excel workbooks

- Make your data tidy
  - One value per cell
  - One observation per row
  - One variable per column
    - Name columns clearly, consistently, and concisely
- Use tables to contain data wherever possible
  - Name tables clearly, consistently, and concisely
- Use meaningful sheet names (not Sheet 1, Sheet 2...)
- Use number formatting as appropriate
  - Dates and percentages are especially important to format correctly
  - No use of potentially confusable formats e.g. short form dates like 01/02/03
  - Text format for CHI numbers, rather than the initial '
- Consider using data validation to make data consistent, especially if you don't really want free text
- Add a documentation / readme worksheet. You might include:
  - a description of the data
  - information about ownership/origin/dates/data sources
  - a key explaining abbreviations
  - explanation of any complex formulas
  - advice about correct and consistent method of naming different versions of the workbook
- Take care using colour-based formatting which can easily breach accessibility guidance. Prefer using status indicators that are more accessible, like colour/shape icons sets