

KIND Community Standards: Excel

Brendan Clarke, NHS Education for Scotland, brendan.clarke2@nhs.scot

03/06/2024

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. The aim is to be:

- universal, to provide effective guidance across health, social care, and housing
- simple and achievable, to keep to the most important guidance only
- realistic and grounded in health, social care, and housing practices

This is a draft of version 1, and this document will be fully reviewed in January 2025 by the KIND network community.

Basic standard for Excel workbooks

- Make your data tidy
 - One value per cell
 - One observation per row
 - One variable per column
- Avoid repetition
 - consider restructuring into several tables to avoid repeating data
- Use tables to contain data wherever possible
- Use meaningful sheet, table, and column names (not Sheet 1, Sheet 2...)
- Use number formatting as appropriate
 - Dates and percentages are especially important to format correctly
 - Text format for CHI numbers, rather than the initial '
- Avoid using colour-based formatting which can easily breach accessibility guidance

- If conditional format is required, prefer using more accessible formats, such as shape icons sets

Enhanced standard for Excel workbooks

Follow the basic standards above, plus:

- 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
- Consider using lambda formulas to avoid repetition of complex formulas
- Prefer structured referencing and naming to the use of complex A1 referencing
- Consider loading data using Power Query, especially if the workbook is designed to be updated