

# CHECK SHEET

**ABC CHECK SHEET**

	1	2	3
A	✓ ✓	✓	
B	✓	✓	✓ ✓
C	✓ ✓ ✓	✓ ✓	✓



## Purpose

A **check sheet** is a simple form on which data can be recorded in a uniform manner. **Check sheets** vary in type, style and complexity from a simple tally sheet to a multiple entry ledger.

A **check sheet** is used to systematically record how often certain events happen. For example, the number of customers that arrive for service at different times of the day. If the categories are selected properly for a **check sheet**, data collected can provide an objective means to make decisions based on the data collected. A **check sheet** is among the first steps in converting theory and opinions into facts that can be effectively analyzed.

**Check sheets** are effective because they are a simple means of collecting data. Most **check sheets** require nothing more than a check or tally mark in an appropriate column or block.

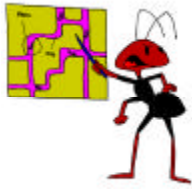
The most common types of **check sheets** include distribution **check sheets**, location **check sheets**, cause **check sheets**, and classification **check sheets**.

*Distribution check sheets* are designed to gather data about how a variable is distributed throughout the range of possible occurrences. For example, a distribution **check sheet** could be used to collect information about the number of people arriving for service at a drivers license office at various times of the day. Data collected in this sample could assist in determining staffing levels at different times of the day.

*Location check sheets* focus on the actual physical location of a defect, error, or problem. Although location **check sheets** are most commonly used in manufacturing, they are also useful in helping to improve the quality of service delivery. For example, at a rail station serving the Piedmont train, we may want to know where passengers stand while waiting for the train to arrive. This information might be used to improve signage, place seating options, or to reduce boarding time. This **check sheet** usually contains a sketch of the area in question and provides space to record where passengers are waiting.

*Cause check sheets* are used to count the frequency or causes to a particular problem. For example, we may want to know the relative frequency of causes to customers being rejected for service. In our drivers license example, we may want to know how many people fail to have proper identification, have a “stop” on their license, cannot pass the vision, written or skills test, or don’t have the necessary fees. This information would be useful in directing problem reduction in areas where the causes are the greatest.

*Classification check sheets* are used to count the frequency of occurrence of major classifications of service or product delivery. We might want to know how many of each type truck passes through the weigh stations. This data might be used in changing legislation to either increase or decrease the numbers of trucks passing through the weigh stations.



## Process

1. Determine what kinds of data are to be collected. What do we want to know about the issue or process? Ask the below listed questions. By asking these questions you create a set of categories that will help ensure that the data collected will address the majority of data needs involved in the process or issue.

- a. What happens ?
- b. Who does it, receives it, or is responsible for it ?
- c. Where does it happen ?
- d. When does it happen ?
- e. How often does it happen ?
- f. How does it happen ?
- g. How long does it take ?
- h. How much (quantity) does it require ?

2. Attempt to have those people responsible for gathering the data be involved in developing the sheets used to record the data collected. They are the people who know the process the best and their input is essential. Those people who use the sheets will also be more committed to the data collection process if they helped design it.

3. Obtain consensus from team members on what data are to be collected. The team needs to make sure that everyone is expected to be looking for the same things.

4. Develop a sample **check sheet** to test the validity of the data to be collected and the ease in use of the data sheets.

5. Develop a header for the **check sheet**. It should contain information on who collected the data, where it was collected, when it was collected, and how it was collected.

6. Develop the body of the **check sheet**. Use the sample **check sheet** and comments.

7. Decide on the time period during which data will be collected. The time period selected will involve cost of collection, time constraints, desired sample size, and availability of personnel to collect data.

8. Collect data as planned by the team.

9. Use data collected and other tools to interpret what the data say. **Check sheets** themselves are not designed to analyze data collected. The data collected are transferred to other analysis tools such as bar charts, histograms, pareto charts, line charts, etc.. By analyzing the data through other tools described in this toolbox, teams should be able to discover why problems exist and make suggestions to fix them.



**Example**

<b>Driver License Weekly Service Check Sheet</b>						
Facility:			Examiner:			
Week Of:						
<b>Service</b>	<b>Mon</b>	<b>Tue</b>	<b>Wed</b>	<b>Thu</b>	<b>Fri</b>	<b>Total</b>
<b>Initial Issuance</b>						
<b>Renewal Issuance</b>						
<b>Reinstatement</b>						
<b>Transfer</b>						
<b>Duplicate</b>						
<b>Voter Registration</b>						
<b>CDL Issuance</b>						
<b>CDL Reinstatement</b>						
<b>CDL Renewal</b>						
<b>Other:</b>						
<b>Other:</b>						
<b>Other:</b>						



## Key Points

- **Check sheets** should be well designed, easy to read, and clearly labeled. This is important since the data collected on **check sheets** are usually collected as the events happen. A simple form is necessary to facilitate accurate recording of those events.
- Ensure that the data collected are what you need to analyze the process.
- Record only necessary information. Don't attempt to collect data not specifically related to the issues being studied.
- Make sure data measurements are accurate and related to the issues being studied.
- Remember that your sample may not be homogeneous (not from the same region, different machinery, different service levels, etc..). If not, it must be stratified or grouped prior to data collection or at least prior to analysis.
- Keep it simple.

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