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THE MEDICAL CITY
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THE PDCA CYCLE SERIES

5 CHECK SHEET

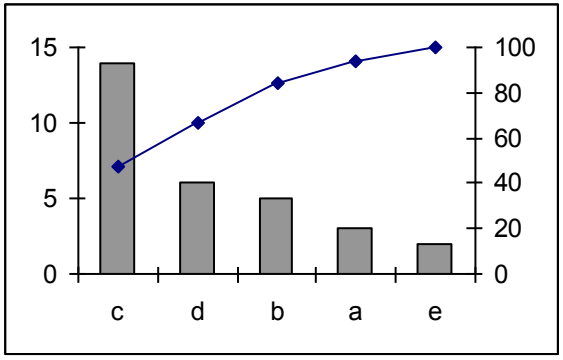
Published by the
Medical Quality Improvement
Office

Resources:

1. Benchbook on Performance Improvement of Health Services, PhilHealth,
2. A Toolbox for Quality Improvement and Problem Solving, by David Staker,
3. Continuous Improvement Tools Vol 1, by Richard Chang and Matthew Niedzwiecki, 1993: Wheeler Publishing.
4. www.asq.org (website of the American Society for Quality)
5. www.mycoted.com for more creativity tools.

9. Graph the results using a Pareto chart (see Module No. 6).

Complaint type	No. of complaints	Per cent	Cumulative per cent
c	14	47%	47%
d	6	20	67
b	5	17	84
a	3	10	94
e	2	6	100
Total	30	100	



What is a check sheet?

A check sheet is a data collection tool usually in the form of a table. It is where events and observations are recorded by placing a checkmark or a tally mark as the event or observation occurred.

A check sheet is a counting tool. It enables you to record manually and then count an event within a specified period of time. Oftentimes, events are recorded as they happen, but historical data may likewise be tallied in a check sheet. Use of check sheets, therefore, starts the process of translating opinion into facts.

A well– and carefully-designed checklist is easy to use. Data generated are easy to interpret. Trends and patterns are easier to spot because data are recorded and compiled systematically and comprehensively.

Check sheets translate "*I think the problem is…*" into "**The data shows the problem is…**"

When to use a check sheet?

A check sheet is the appropriate tool when you need to -

- Record **facts**
- Determine **how frequently** a particular event or observation occurs within a certain time
- Ensure that data recording is **accurate**
- Ensure that data will be **easy to use** later

5. Record data for two weeks, starting at 8:00 am December 1 to 8:00 am December 15.
6. The Help Desk receptionist on duty is designated to fill up the check sheet. All the Help Desk staff are oriented on the form. The items listed are explained to them.

The check sheet is tested for three days to give each of the Help Desk receptionists a chance to try out using the form.

7-8. Data is collected. Tick marks are placed appropriately on the form as complaints are logged in at the help desk.

Shift	Our printer won't print when we charge (a)	Printer of receiving unit won't print our orders (b)	Computer hangs up when we transact (c)	System doesn't respond when we tag rooms (d)	Doctor's name not in List of Values (e)
6am-2pm	/	//	///		
2pm-10pm	//	///	///		//
10pm-6am			///// ///	///// /	
Total	3	5	14	6	2

Designing and using the check sheet - Illustrated...

STEP

1. You want to count the kind of complaints logged in at the IT help desk. You define a "complaint" as a statement about a problem with the computer hardware or the software encountered by a TMC employee during their work shift. Limit the complaints to those referring to the Shaman system only.
2. For every complaint received, have the IT help desk note the time and write the exact words of the complainant.
3. Group similar complaints together.
4. Organize the check sheet as follows:

The first column records the time the complaint was received at the help desk. The rest of the columns are labeled with the type of complaint. One check sheet is used per day of observation.

Shift	Our printer won't print when we charge	Printer of receiving unit won't print our orders	Computer hangs up when we transact	System doesn't respond when we tag rooms	Doctor's name not in List of Values
6am-2pm					
2pm-10pm					
10pm-6am					
Total					

Why use a check sheet?

A check sheet -

- Is simple and efficient.
- Distinguishes between fact and opinion
- Builds clear picture of "the facts".
- Forces agreement on definition of condition or event.
- Brings out patterns in data.

How is a check sheet designed and used?

STEP

1. Decide what event or problem you want to be observed (or counted) and agree on operational definitions.
2. Decide on the time period during which you want to collect the data.
3. Decide from where the data will be collected (sources).
4. Design the check sheet.
   - List the categories in the first column of the table or across the column headings.
   - Set it up so that the event can be recorded simply by check or tick marks.
   - Label all row and column headings.

5. Decide who will collect the data. Go through the check sheet with data collectors and make sure that they have the same understanding of the events to be recorded.

6. If time permits, you might want to test the check sheet first for a short trial period to ensure it picks up the appropriate data and that it is easy to use.

7. During data collection, a check mark is placed on the check sheet each time the event being observed occurs.

8. Continue collecting the data within the time period specified. Make sure the data is collected consistently and accurately.

9. At the end of the data collection period, get the row and column totals. You may develop a graphic summary like a histogram or a Pareto diagram.