CHECK SHEET

DESCRIPTION
The check sheet is a structured form that makes it easy to gather data based on simple observation to begin to detect trends. Such forms are useful during every stage of a process to collect, record, and analyze data. Data categories are clearly defined so that they are unique and unambiguous. Therefore, one can use a check sheet to distinguish between opinions and facts and to gather data about how often a problem or type of a problem is occurring.

Check sheets are most appropriate when the data are collected using pre-established criteria.

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users can custom design the check sheet to readily interpret results. The format visually displays data that reveal underlying patterns without requiring complicated calculations.</td>
<td>The process of filling out a check sheet manually can be time consuming.</td>
</tr>
</tbody>
</table>

APPLICATIONS
1. Identify process improvement opportunities.
2. Internal audits and in-process reviews.
3. Post implementation monitoring.
4. Data from check sheets can be organized into a pareto chart or root cause analysis for further investigation.

HELPFUL HINTS
1. Normalize your data.
2. Ensure that individuals have a common understanding of the categories of data being collected.
3. The use of spreadsheet software will help in the analysis of data gathered.

EXAMPLES

**Phase I**
Data are in broad categories. In this example, data shows the Collection/Procedure category as having the highest number of nonconforming events. The categories that require more in-depth focus will be expanded upon in Phase II.

<table>
<thead>
<tr>
<th>NONCONFORMING EVENTS</th>
<th>QUANTITY</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessioning</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Collection/Procedure</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Component Creation</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Component Modification</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Distribution Management</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Donor Management</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Draw Info</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Labeling</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Record Review</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Recruitment</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Registration</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

**Phase II**
Data is more specific. In Phase II data reveals the tasks or processes in the Collection/Procedure category that have the highest number of nonconforming events.

<table>
<thead>
<tr>
<th>NONCONFORMING EVENTS</th>
<th>QUANTITY</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted Ineligible Donor</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>No Donor Signature on Consent</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Failed to weigh plasma donor</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

The data gathered in Phase II reveal that failing to obtain the donors signature on the donor consent form accounts for 70% of the errors in the Collection/Procedure category.

From this data you can determine a target intervention to aid in lowering the rate of nonconformances in the Collection/Procedure category.