Online library of Quality, Service Improvement and Redesign tools

Check sheet

NHS England and NHS Improvement
Check sheet

What is it?
A check sheet is a simple form that you can use to systematically gather and analyse data to show how frequently something happens; in effect, a simple tally sheet. Check sheets are often used in Lean and Six Sigma projects.

When to use it
Use check sheets to support root cause analysis using five whys – when you have identified a key problem area and need to gather more data to drill down to the specific root cause of a problem.

Use them when data can be observed and collected repeatedly by the same person or in the same place.

How to use it
Design a data collection form – see below for an example.

1. Create your check sheet form – make it simple to use, eg so that data can be recorded by a cross, tick or ‘five bar gate’. Consider how you will analyse your data when you design it. Include the name of the data collector, time period and explanatory title plus a space for comments. Define the data to be collected to avoid confusion and ensure consistency regardless of the person collecting the data.

2. Test the form and make changes as required.

3. Make a list down the left hand side of the possible causes of the problem.

4. Collect data and once complete, analyse the main causes by simply counting the number of times (frequency) each possible cause occurs.

5. You can turn the results into a histogram or Pareto chart to highlight main causes and apply the 80:20 rule.
A check sheet used to gather data on causes of accidents may look like this:

**Figure 1: Check sheet**

<table>
<thead>
<tr>
<th>Cause</th>
<th>Place a mark each time it occurs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slips, trips and falls</td>
<td>···</td>
</tr>
<tr>
<td>Lifting and carrying</td>
<td>···</td>
</tr>
<tr>
<td>Cuts</td>
<td>···</td>
</tr>
<tr>
<td>Burns</td>
<td>···</td>
</tr>
<tr>
<td>Contact with substances</td>
<td>···</td>
</tr>
</tbody>
</table>

**What next?**

After you have completed the data collection and analysis, you will have hopefully determined the main causes of the problem. Recording the results in a Pareto chart may help you determine which categories to focus your efforts on to ensure maximum impact.

**Additional resources**