

DATA COLLECTION CHECKLIST

A -- Attended to (yes, OK, answer(s) known, done, etc.)

N -- Not attended to (not applicable, not needed, little or no risk, etc.)

A N WHAT DATA AND HOW COLLECTED

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Have we completed the project definition checklist? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Do we know what items we will be charting? |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Do we know where our study will start and stop? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Do our objectives require any special data (processing times, error rates, volumes, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Will we follow an actual case or a dummy? |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Are there any geographical problems to data collection and if so do we have a plan to meet them? |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Do we have a schedule for fact gathering? |

NOTIFICATION

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Have we cleared our visits through the chain of command? |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. Was a memo sent? |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Have the people in the work areas been informed that we will be coming in? |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Have the people in the work areas been told why the study is being done? |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. Are people concerned over possible job loss or job change? |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. If so have they been reassured by people with authority? |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. Have they had a chance to ask questions? |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Are the people aware of our fact-gathering schedule? |

METHOD SUGGESTIONS – REVIEW PRIOR TO DATA GATHERING

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|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 16. Gather facts at the work place. |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. Gather facts from the people who do the work. |
| <input type="checkbox"/> | <input type="checkbox"/> | 18. Gather facts primarily from observation, not discussion. |
| <input type="checkbox"/> | <input type="checkbox"/> | 19. Ask permission before starting. |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. Do not impose yourself. |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. Be friendly, a little idle conversation doesn't hurt. |
| <input type="checkbox"/> | <input type="checkbox"/> | 22. Don't let the conversation stretch out. |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. Record facts quickly using symbols and abbreviations. |
| <input type="checkbox"/> | <input type="checkbox"/> | 24. Interrupt for clarification. |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. Put the facts gathered in order while they are fresh so that they will not be forgotten. They should be charted, written out or dictated on the same day that they are gathered. |
| <input type="checkbox"/> | <input type="checkbox"/> | 26. Do not use a tape recorder at the workplace. |
| <input type="checkbox"/> | <input type="checkbox"/> | 27. Check out the facts that you have recorded with the person who gave them to you. |
| <input type="checkbox"/> | <input type="checkbox"/> | 28. Do not look for faults while collecting facts. |
| <input type="checkbox"/> | <input type="checkbox"/> | 29. Do not solicit improvement ideas while fact gathering. |
| <input type="checkbox"/> | <input type="checkbox"/> | 30. If ideas are volunteered, record them. |
| <input type="checkbox"/> | <input type="checkbox"/> | 31. Show respect for the work and the people doing it. |