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**Checklist Building Guidelines**

**Forming Questions**

* The Safety Reports system is built with a schema such that a "yes" response means a positive observation and consequent scoring. A “no” response means a negative and reduces the safety score.
  + Example of bad question: “Are there obstructions in aisles?”
    - This would result in a ‘Yes’ which is not good for an inspector, it creates a ‘positive’ observation for a negative situation.
  + Example of a good question: “Are aisles free of obstructions?”
    - This results in a ‘Yes’ for a positive observation for a positive situation.
  + Use of double negatives can be helpful if used correctly.
* Keep questions short and concise.
  + Remember, these questions will appear in a mobile app.
    - Having to read a long question (on a cell phone with small print for example) slows the process for inspectors.
    - There is a length limit of 150 characters for questions to help guard against this issue.
  + Consider splitting long questions into multiple questions or leaving multiple hazards out of a question, instead using generalities or ‘etc.’ phrasing.
  + Remember, use enough information that an inspector will know whether to check 'yes' or 'no,' but not so much that they are overwhelmed reading it.
* Remember to place a question mark (?) following each question.
* Questions can be used to direct inspectors to record specific information, directives for them to enter information in the ‘Narrative’ or ‘Notes’ sections can be included.

**Forming ‘Yes’ and ‘No’ Responses**

* ‘Yes’ and ‘No’ responses should essentially restate the question, but also must address the observation being made by the inspector in plain text.
* Ideally, 'Yes' and 'No' responses should be typed out in the form of a sentence, but there is no need to place a period at the end of responses.
* Remember, a ‘Yes’ response means the inspector is noting a positive observation – this may be the lack of a hazard or issue.
  + Example of a bad ‘Yes’ response: “There are obstructions in aisles”
    - Although it identifies a hazard, the system will count this as a positive.
  + Example of a good ‘Yes’ response: “The aisle is free of obstructions”
* The same is true of ‘No’ responses
  + Example of a bad ‘No’ response: “There are no obstructions in aisles.”
    - Although it notes the aisles are free of hazards, the system will count this as a negative.
  + Example of a good ‘No’ response: “The aisle is not free of hazards.”

**Recommendations**

* Can be the most difficult thing to create in a checklist. Recommendations must be written to consider the identified hazard or worksite issue, but also include an imperative for responsible parties to help fix the problem.
* Example phrasing such as ‘take steps to ensure’ and ‘identified issues are not in keeping with company standards’ can help underline urgency and give those responsible for remediating issues a path to follow.
* Inclusion of a specific standard, whether state/local/OSHA or internal can be helpful but is not required.

**Referencing Standards**

* There's no need to reference applicable standards, checklists can include these the way Safety Reports checklists do, but do not have to do so.
* If referencing standards in-line, they must be easily understood, and must be short for every field except recommendations.
  + Example of a bad standard reference in a ‘Yes’ response: “Aisles/walkways are kept neat and orderly in accordance with OSHA General Industry Standard Subpart ‘D’ ‘Walking and Working Surfaces’ 1910.22(a).”
    - As with other items, keep in mind this is in a mobile app and length can be the enemy of the inspector
  + Example of a good standard reference in a ‘Yes’ response: “Aisles/walkways kept clean and orderly (1910.22)”
    - This includes the applicable standard, but keeps the response short
* Standards from state/local governments are generally available to the public and can be made available to the inspector in-app using hyperlinks.
  + Safety Reports uses this function to link inspectors straight to sites managed by the Department of Labor
  + Hyperlinks to references can be added to any inspection, if the website called is not in an intranet or protected, or available to only those who sign in
  + Hyperlink references must be kept very short, 20 characters or less
  + Hyperlinks themselves have no limit on length, but keep in mind that calling a very specific part of a very large website may cause performance issues with anything but very strong wireless internet on mobile devices
* Standards from other sources can be used, but the restrictions on website accessibility must be kept in mind.

**QA/QC**

* Please be patient and take time to ensure spelling, grammar, phrasing and syntax look good. What is typed will appear in inspection reports and go to either management or clients, depending on the situation.
* The ‘spell check’ feature will not catch some items which can cause responses or questions to be incorrectly typed or phrased.
  + For example: words like ‘for’ and ‘fro’ are both correct to a computer and correct English.
* Using proper case can be vital.
  + Though upper case can be used to stress items’ importance, remember words written that way may not look good on a written report reviewed by an executive.
  + An upper-case letter in the middle of a sentence can distract readers.
  + A lower-case proper term such as a manufacturer name or location can cause confusion.
* Taking extra time to review checklist content is worth it so mistakes are caught in drafts when they are easier to correct.

**Support and Consultation**

* Safety Reports offers checklist customization and troubleshooting at no additional cost to clients of our Enterprise system.
* For assistance, please contact: support@safety-reports.com or call (402) 403-6575 ext. 2.