

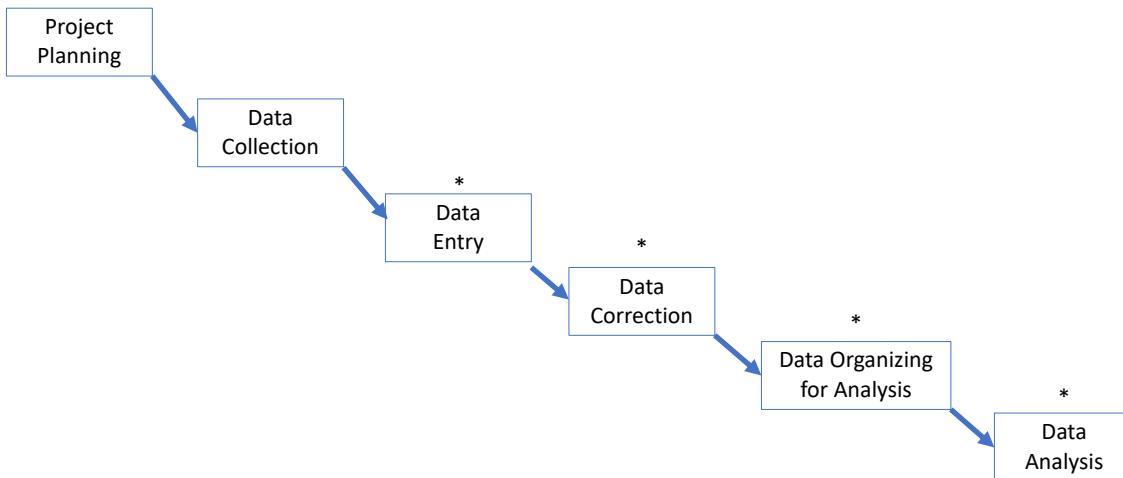
Efficient Data Collection

2



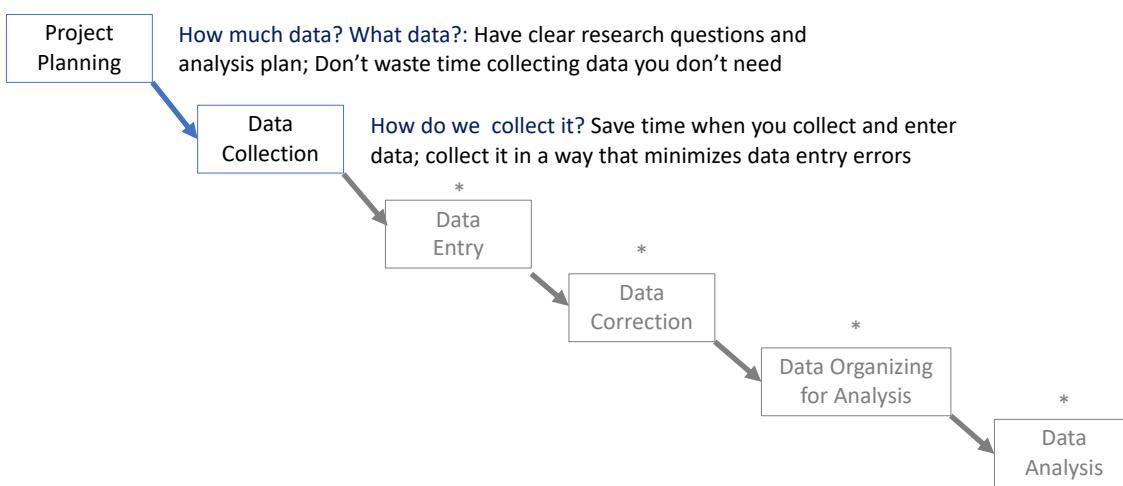
3

How can we be more efficient?



4

How can we be more efficient?



5

Why does this matter?

6

1-10-100 Rule

“the cost of quality”

Data entry errors multiply costs exponentially according to the stage at which they are identified and corrected.

\$1: Price to check the data at first point of entry

\$10: Price to find and correct error when it is part of a batch

\$100: Cost of fixing the mistake when it reaches customers

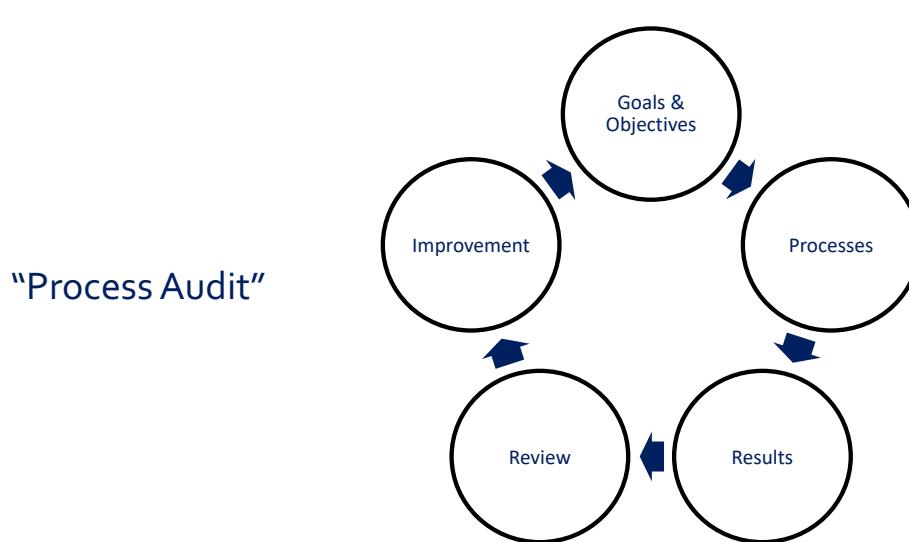
prevention is less costly than *correction* is less costly than *failure*

7

Effort now saves time, money, & stress later.

8

Where can errors be introduced?



9

1**"Population Genetics of Lizards in Florida's Longleaf Pine Savannas"**

After collecting lizards in traps, animals are returned to the lab and euthanized. A piece of each animal's liver is removed, weighed using a scale, and stored in a plastic tube filled with ethanol. The data are later entered into a spreadsheet for analysis



Photo: FWC Fish & Wildlife Research Institute (CC BY-NC-ND 2.0)

10

2**"Diversity & Dynamics of Tropical Tree Communities"**

Every tree in a 10-ha plot is marked with an ID number and identified to species. The diameter at breast height (DBH) of each tree is measured with a tape measure and the location is recorded with a GPS. The DBH, species, and location of each tree are recorded on datasheets; in the evening at the field station these data are entered in a spreadsheet on a laptop computer.



Photo: Life Forestry (CC BY-NC-ND 2.0)

11

3

"Economic Costs and Benefits of Diversified Crop Production in Rural Tanzania"

Villagers were interviewed to better understand their agricultural practices. In addition to answering questions asked by the researcher with the assistance of a translator, the participants were asked to make a *resource allocation map*, which is a drawing of the relative amount of their budget allocated to food, transportation, education, farming supplies, and other expenses.

The audio recordings of the interviews were translated and transcribed to MS Word documents by bilingual students from the university. The maps were brought back to university so researchers could compare each subject's responses during the interview with the budget allocations they drew on the map. Data about each interview (e.g., subject, location, translator, researcher conducting the interview) were also entered in a spreadsheet).



Photo: Nkumi Mtingwa/CIFOR (CC BY-NC-ND 2.0)

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What can I do?

1. Checklists
2. Automation
3. Asset Management
4. UX/UI

13

1. Checklists

Surgical Safety Checklist



Patient Safety
A World Alliance for Safer Health Care

Before induction of anaesthesia

(with at least nurse and anaesthetist)

- Yes
- Has the patient confirmed his/her identity, site, procedure, and consent?
- Is the site marked?
 - Yes
 - Not applicable
- Is the anaesthesia machine and medication check complete?
 - Yes
- Is the pulse oximeter on the patient and functioning?
 - Yes
- Does the patient have a:
 - Known allergy?
 - No
 - Yes
 - Difficult airway or aspiration risk?
 - No
 - Yes, and equipment/assistance available
 - Risk of >500ml blood loss (7ml/kg in children)?
 - No
 - Yes, and two IVs/central access and fluids planned

Before skin incision

(with nurse, anaesthetist and surgeon)

- Confirm all team members have introduced themselves by name and role.
- Confirm the patient's name, procedure, and where the incision will be made.

Has antibiotic prophylaxis been given within the last 60 minutes?

- Yes
- Not applicable

Anticipated Critical Events

- To Surgeon:
- What are the critical or non-routine steps?
 - How long will the case take?
 - What is the anticipated blood loss?

To Anaesthetist:

- Are there any patient-specific concerns?
- Has sterility (including indicator results) been confirmed?
- Are there equipment issues or any concerns?

Is essential imaging displayed?

- Yes
- Not applicable

Before patient leaves operating room

(with nurse, anaesthetist and surgeon)

Nurse Verbally Confirms:

- The name of the procedure
- Completion of instrument, sponge and needle counts
- Specimen labelling (read specimen labels aloud, including patient name)
- Whether there are any equipment problems to be addressed

To Surgeon, Anaesthetist and Nurse:

- What are the key concerns for recovery and management of this patient?

This checklist is not intended to be comprehensive. Additions and modifications to fit local practice are encouraged.

Revised 1 / 2009

© WHO, 2009

14

NORMAL CHECKLIST																																						
BEFORE START <table border="0"> <tr> <td>COCKPIT PREP</td> <td>COMPLETE (BOTH)</td> <td>CONFIRMED</td> </tr> <tr> <td>GEAR RIMS AND COVERS</td> <td>REMOVED</td> <td>.NOTIFY</td> </tr> <tr> <td>SIGNS</td> <td>ON / AUTO</td> <td>ON</td> </tr> <tr> <td>ADIRS</td> <td>NAV</td> <td>SET</td> </tr> <tr> <td>FUEL QUANTITY</td> <td>KG. / BALANCED</td> <td>SET</td> </tr> <tr> <td>TO DATA</td> <td>SET</td> <td>AS QRND</td> </tr> <tr> <td>BARO REF.</td> <td>SET</td> <td></td> </tr> <tr> <td>WINDOWS / DOORS</td> <td>CLOSED / ARMED (BOTH)</td> <td></td> </tr> <tr> <td>BEACON</td> <td>ON</td> <td></td> </tr> <tr> <td>MOBILE PHONE</td> <td>OFF (BOTH)</td> <td></td> </tr> <tr> <td>THRUST LEVERS</td> <td>IDLE</td> <td></td> </tr> <tr> <td>PARKING BRAKE</td> <td>SET</td> <td></td> </tr> </table>			COCKPIT PREP	COMPLETE (BOTH)	CONFIRMED	GEAR RIMS AND COVERS	REMOVED	.NOTIFY	SIGNS	ON / AUTO	ON	ADIRS	NAV	SET	FUEL QUANTITY	KG. / BALANCED	SET	TO DATA	SET	AS QRND	BARO REF.	SET		WINDOWS / DOORS	CLOSED / ARMED (BOTH)		BEACON	ON		MOBILE PHONE	OFF (BOTH)		THRUST LEVERS	IDLE		PARKING BRAKE	SET	
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2. Automation



<https://ifttt.com/>

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https://en.wikipedia.org/wiki/List_of_countries_by_Human_Development_Index

The United Nations Development Programme (UNDP) compiles the Human Development Index (HDI) of 189 countries in the annual Human Development Report. The index considers the health, education and income in a given country to provide a measure of human development which is comparable between countries and over time.^{[1][2]}

The HDI was first published in 1990 with the goal of being a more comprehensive measure of human development than purely economic measures such as gross domestic product. The index incorporates three dimensions of human development: a long and healthy life, knowledge, and decent living standards. Various indicators

Rank	Nation	2019 data (2020 report) ^[3]	HDI Average annual growth (2010–2019) ^[4]
1	Norway	0.957	▲ 0.20%
2	Ireland	0.955	▲ 0.65%
2	Switzerland	0.955	▲ 0.16%
4	Hong Kong	0.949	▲ 0.54%
4	Iceland	0.949	▲ 0.62%
6	Germany	0.947	▲ 0.24%
7	Sweden	0.945	▲ 0.41%
8	Australia	0.944	▲ 0.17%
8	Netherlands	0.944	▲ 0.32%
10	Denmark	0.940	▲ 0.28%
11	Finland	0.938	▲ 0.28%
11	Singapore	0.938	▲ 0.35%
13	United Kingdom	0.932	▲ 0.24%
14	Belgium	0.931	▲ 0.25%
14	New Zealand	0.931	▲ 0.30%
16	Canada	0.929	▲ 0.34%

17

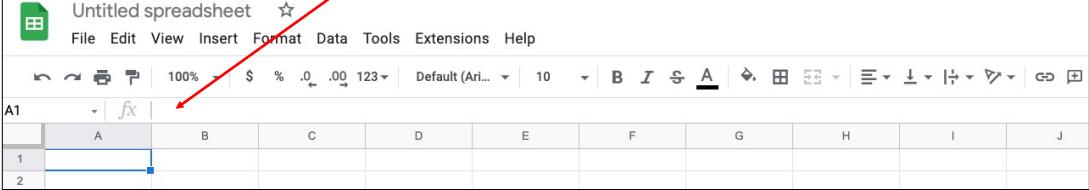
Open Google Sheets

Enter the function below:

Be sure "URL" and the word 'table' have quotes (" ") around them.

The number 1 = first table on the page.

```
=ImportHtml("https://en.wikipedia.org/wiki/List_of_countries_by_Human_Development_Index", "table", 1)
```



18

3. Asset Management

Save time and reduce errors by labeling items (e.g., vials, sheets, forms) and “fill out” forms in advance.



19

4. UX/UI

Save time and reduce errors by formatting forms to speed up data collection, minimize errors, and streamline data entry.

[Bisits Bullen, Piroska. How to design survey forms for quick data entry.](#)

[Coyle, Andrew. "Form design best practices"](#)

KonnektConference

Online Event Registration

First Name	Last Name	
First Name	Last Name	
Email Address		
Email Address		
Address Line 1		
Address Line 1		
Address Line 2		
Address Line 2		
City	State	Zip Code
City	State	Zip Code

20

CWAC
COORDINATED WATERBIRD COUNTS
(CWAC forms part of Wetland International's African Waterbird Census Programme)

SITE DATA COLLECTION FORM

Please return this form to: CWAC, Animal Demography Unit, University of Cape Town, Rondebosch, 7701. Or email to cwac@adu.org.za. For assistance with filling in the form, please refer to CWAC Information Sheet number 8

NAME OF SITE:	SITE CODE:			
Degrees-minutes-seconds or Decimal degrees	or Deg. & decimal minutes	GPS setting		
S <input type="text"/> ° <input type="text"/> ' <input type="text"/> " · S <input type="text"/> ° <input type="text"/> ' <input type="text"/> " · S <input type="text"/> ° <input type="text"/> ' <input type="text"/> " · E <input type="text"/> ° <input type="text"/> ' <input type="text"/> " · E <input type="text"/> ° <input type="text"/> ' <input type="text"/> " · WGS-84 datum HBH94	Cape datum Clarke 1880			
<input checked="" type="checkbox"/>				
PROVINCE (underline applicable option)				
LP MP GP NW FS KN EC NC WC	DATE OF SURVEY:	ADU OBSERVER CODE:		
NEAREST TOWN:				
CONSERVATION MEASURES SURROUNDING THE SITE / WETLAND (underline applicable option)				
Conservation status:	1 – Protected	2 – Partially protected	3 – Unprotected	4 – Unknown
Site / Management status (underline applicable option or add additional)				
<ul style="list-style-type: none"> • Part of a National Park • Part of a Provincial Reserve • Part of a Municipal Reserve • Part of a Private Reserve • Registered Conservancy • Private Land • State Land • Municipal Land • Mining Property 				
Name of protected area / farm / private land etc:				
Current land use surrounding site (e.g. agriculture, grazing, hunting, urban – indicate dominant type):				
Ownership / Management of site (name, email and telephone number):				
Is it a Ramsar site (name):				
Is it within an Important Bird Area (name):				
WETLAND / SITE CLASSIFICATION (underline the relevant options and indicate the % make-up of each)				
Wetland classification	(%)	Wetland classification	(%)	
Marine / Coastal Wetlands		Seasonal flows / streams (inc. waterfalls)		
Permanent shallow marine waters (>6m at low tide)		Permanent freshwater lakes (>2ha) (inc. oxbow lakes)		
Rocky marine shores (inc. cliffs and offshore islands)		Seasonal freshwater lakes (>2ha) (inc. floodplain lakes)		
Sandy or pebble shores (inc. sand banks and dunes)		Permanent freshwater marshes (>0.01ha) (inc. swamps)		
Estuarine waters (permanent water of est. systems)		Seasonal freshwater marshes (>0.01ha) (inc. vleis)		
Brackish waters		Temporary freshwater lakes		
Intertidal mud, sand or salt flats		Seasonal brackish / saline lakes (inc. flats)		
Intertidal marshes (inc. salt, brackish and freshwater)		Permanent brackish / saline marshes (inc. pans and pools)		
Intertidal forested wetlands (inc. mangrove swamps)		Seasonal brackish / saline marshes (inc. pans and pools)		
Coastal brackish / saline lagoons		Freshwater shrub-dominated wetland		
Coastal freshwater lagoons		Freshwater tree-dominated wetlands (inc. swamp forest)		
Inland Wetlands		Freshwater springs and seeps		
Permanent rivers / streams (inc. waterfalls)				

1. Conduct a “Process Audit” of these data collection forms
2. What would your UX be if you were filling out these forms?

21

Line-Transect Data Sheet

Date: _____	Survey Site: _____	Transect #: _____
Weather: _____	Start Time: _____	End Time: _____
Investigator(s): _____	Target Species: _____	Transect Direction: _____

Observation	Number of Individuals	Age/Sex	Sighting Distance	Sighting Angle	Comments

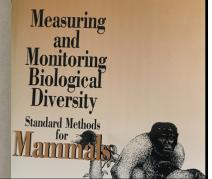


Figure 5. Suggested format for a standardized line-transect.

22

C W A C
COORDINATED WATERBIRD COUNTS

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PROVINCE (underline applicable option)	
LP MP GP NW FS KN EC NC WC	DATE OF SURVEY:
ADU OBSERVER CODE:	
COMPILERS DETAILS (name, address, telephone, email etc.):	
CONSERVATION MEASURES SURROUNDING THE SITE / WETLAND (underline applicable option)	

23

1. Reduce Cognitive Overload (aka keep it simple)
2. Write as little as possible

C W A C
COORDINATED WATERBIRD COUNTS
(CWAC forms part of Wetland International's African Waterbird Census Programme)



SITE DATA COLLECTION FORM

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<input type="text"/> S <input type="text"/> ° <input type="text"/> . <input type="text"/> °	- S <input type="text"/> ° <input type="text"/> . <input type="text"/> °	Cape datum Clarke 1880 <input type="checkbox"/>	
<input type="text"/> E <input type="text"/> ° <input type="text"/> . <input type="text"/> °	- E <input type="text"/> ° <input type="text"/> . <input type="text"/> °	WGS-84 datum BH94 <input type="checkbox"/>	
PROVINCE (underline applicable option)		DATE OF SURVEY:	
LP MP GP NW FS KN EC NC WC	ADU OBSERVER CODE:	COMPILERS DETAILS (name, address, telephone, email etc.)	
NEAREST TOWN			
CONSERVATION MEASURES SURROUNDING THE SITE / WETLAND (underline applicable option)			
Conservation status: 1 - Protected 2 - Partially protected 3 - Unprotected 4 - Unknown			
Site / Management status: (underline applicable option or add additional)			
<ul style="list-style-type: none"> • Part of a National Park • Part of a Provincial Reserve • Part of a Local / Municipal Reserve • Part of a Private Reserve • Registered Conservancy • Private Land • State Land • Municipal Land • Mining Property 			
Name of protected area / farm / private land etc:			
Current land use surrounding site (e.g. agriculture, grazing, hunting, urban – indicate dominant type):			
Ownership / Management of site (name, email and telephone number):			
Is it a Ramsar site (name):			
Is it within an Important Bird Area (name):			
WETLAND / SITE CLASSIFICATION (underline the relevant options and indicate the % make-up of each)			
Wetland classification	(%)	Wetland classification	(%)
Marine / Coastal Wetlands		Seasonal rivers / streams (inc. waterfalls)	
Permanent shallow marine waters (<6m at low tide)		Permanent freshwater lakes (>8ha) (inc. oxbow lakes)	
Rocky marine shores (inc. cliffs and offshore islands)		Seasonal freshwater lakes (>8ha) (inc. floodplain lakes)	
Sandy or pebble shores (inc. sand banks and dunes)		Permanent freshwater swamps (inc. fens, swamps)	
Estuarine areas (permanent water of est. systems)		Seasonal freshwater marshes (inc. fens, swamps)	
River mouth		Permanent brackish / saline / alkaline lakes	
Intertidal mud, sand or salt flats		Seasonal brackish / saline / alkaline lakes (inc. flats)	
Intertidal marshes (inc. salt, brackish and freshwater)		Permanent brackish / saline marshes (inc. pans and pools)	
Intertidal forested wetlands (inc. mangrove swamps)		Seasonal brackish / saline marshes (inc. pans and pools)	
Coastal saltwater lagoons		Freshwater shrub-dominated wetland	
Coastal freshwater lagoons		Freshwater tree-dominated wetland (inc. swamp forest)	
Inland Wetlands		Freshwater springs and oases	
Permanent rivers / streams (inc. waterfalls)			

24

Use labels & keep them short...

My email address is:	Email
<input type="text"/>	<input type="text"/>
My email password is:	Password
<input type="text"/>	<input type="text"/>
✖ Bad practice ✓ Alternative	

25

Be careful with the location of input labels to avoid mistakes

Poor alignment leads to filling out forms incorrectly

Label

Label

Label

 Bad practice

Label

Label

Label

 Alternative

26

...and pay attention to where you put the labels

Immigration and Naturalization Service
Form I-94W (05-29-91) - Arrival Record
VISA WAIVER

1. Family Name	2. First (Given) Name	3. Birth Date (day/month)
4. Country of Citizenship	5. Sex (male or female)	
6. Passport Number	7. Airlines and Flight Number	
8. Country where you live	9. City Where you boarded	
10. Address While in the United States (Number and Street)		
11. City and State		

Government Use Only

Figure 17 — Part of a US Immigration form: *a high error rate caused by faulty labeling*

Immigration and Naturalization Service
Form I-94W (05-29-91) - Arrival Record
VISA WAIVER

1. Family Name	2. First (Given) Name	3. Birth Date (day/month)
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10. Address While in the United States (Number and Street)		
11. City and State		

Government Use Only

Figure 18 — A better approach: *completing the box would solve the problem*

27

Use the appropriate input type and tag...

Radio Button vs. Check Box

Was this article helpful?

Yes

No

Comments

Good article and I would like to learn more.

 Don't

Was this article helpful?

Yes

No

Comments

This was a good article and I would like to learn more.

 Do

28

Use the appropriate input type and tag...and format them in helpful ways

Blanks vs. Fill-in Boxes (narrow, wide, height)

Circling Options vs Check Boxes (distance between)

Likert scale options (vertical vs. horizontal, direction of impact, words vs. numbers)

Options to constrain errors vs. Unknown Results

Are you a military Veteran?
If Yes, Dates of Active Duty:

Yes No

to

M? D? Y?

	Never	Rarely	Sometimes	Always	N/A
Offices	<input type="radio"/>				
Classrooms	<input type="radio"/>				
Laboratories	<input type="radio"/>				
Restrooms	<input type="radio"/>				
Common areas/hallways	<input type="radio"/>				
Conference Room/Auditorium	<input type="radio"/>				

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Blue is a great colour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Green is a great colour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Purple is a great colour	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yellow is a great colour	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Circle last year of school completed: 6 7 8 9 10 11 12 13 14 15 16 17 18

Circle the highest degree earned: High School Diploma GED Certificate AA BD MD PHD Other

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Forms should be one column...

One-column forms are more comfortable to scan and conform better to mobile displays. Multiple columns can strain a user and cause them to skip fields accidentally.

Bad practice

Alternative

30

...Except when multi-column makes sense

Fields that logically go together should be inline

Bad practice

Alternative

31

Group related fields

Filled out faster and reduces cognitive overload

Personal		
First name	MI	Last name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email		
<input type="text"/>		
Phone		
<input type="text"/>		
Address		
<input type="text"/>		
Address 2		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Zip code City State		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<hr/>		
✖ Bad practice		
Contact		
Phone		
<input type="text"/>		
Address		
<input type="text"/>		
Address 2		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Zip code City State		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<hr/>		
✔ Alternative		

32

AVOID ALL CAPS

All caps make things hard and tiring to read

FULL NAME	Full name
<input type="text"/>	<input type="text"/>
EMAIL	Email
<input type="text"/>	<input type="text"/>
PASSWORD	Password
<input type="text"/>	<input type="text"/>
<hr/>	
✖ Bad practice	
<hr/>	
✔ Alternative	

33

For online forms: Show all options if < 6 (unless space is limited)

Dropdown selector requires 2 clicks

Political affiliation

Select

- Democrat
- Republican
- Libertarian
- Green
- Other

 Don't

Political affiliation

- Democrat
- Republican
- Libertarian
- Green
- Other

 Do

34

Number questions and responses

How many years of school did you complete? (*select only one*)

- None
- Grade 1-5
- Grade 6-9
- Grade 10-12
- College

5. How many years of school did you complete? (*select only one*)

- 1 None
- 2 Grade 1-5
- 3 Grade 6-9
- 4 Grade 10-12
- 5 College

5. តើម៉ោងទូលាការអ្នកបំពិតណាក? (ស្មម្បីសយកចំណើយផែទៅ)

- 1 មិនបានដួចទេ
- 2 ៥ឆ្នាំ១-៥
- 3 ៥ឆ្នាំ៦-៩
- 4 ៥ឆ្នាំ១០-១២
- 5 មហាផ្ទៃរាល់

35

Use Formatting to guide the data collectors

Avoid 2x-sided sheets

Grey bars separate sections

All answers are aligned down the page

Give each sheet a unique ID number

A light grey table is used to separate questions

Add Collector info

Women Living with HIV Support Project
Needs Assessment Survey

ID: _____

PERSONAL DETAILS

- How old are you? _____
- What is your marital status? (select only one)
 - 1 O Single
 - 2 O Married
 - 3 O Divorced
- Is your husband alive?
 - 1 O Yes
 - 2 O No
- How many children do you have? _____
- How many years of school did you complete? (select only one)
 - 1 O None
 - 2 O Grade 1-5
 - 3 O Grade 6-9
 - 4 O Grade 10-12
 - 5 O College

SUPPORT SERVICES

- Where did you go for your first HIV test? (select only one)
 - 1 O Private clinic
 - 2 O Public clinic
 - 3 O NGO clinic
- Have you received any social support in the last two years? (select all that apply)
 - 1 Food
 - 2 Non-food materials
 - 3 Health care services
 - 4 Shelter
 - 5 Money or other In-kind support
 - 6 Other
- How would you rate the following government services in your area?

1.Terrible	2.Poor	3.Average	4.Good	5.Excellent	6.Don't know
a) Health centre					
b) Hospital					
c) School					
d) Police					

Interviewer signature: _____
Interviewer name: _____
Date: _____