

# Checksheets

The purpose of the  
checksheet is to  
assist in the  
data collection process.

# Checksheets

**Checklist Checksheet**

**Item Checksheet**

**Location Checksheet**

**Matrix Checksheet**

# Checklist

## Example - Project Management

**Project Name:**

**Date:**

**Project Manager:**

**Management Step**

**Status**

Define the Project



Generate Tasks



Roles & Responsibilities



Costs Estimates



Task Sequence

Scheduling

Project Budget

# Item Checksheet

Defects on Completed Projects Delivered to the Customer

Projects:

Customers:

<u>Type of Defect</u>	<u># of Occurrences</u>
Incomplete	II
Typos	IIII IIII II
Miscalculations	IIII
Past Due Delivery	IIII IIII IIII
Formatting	III
Missing Pages	IIII III
Misplaced	II

# Location Checksheet

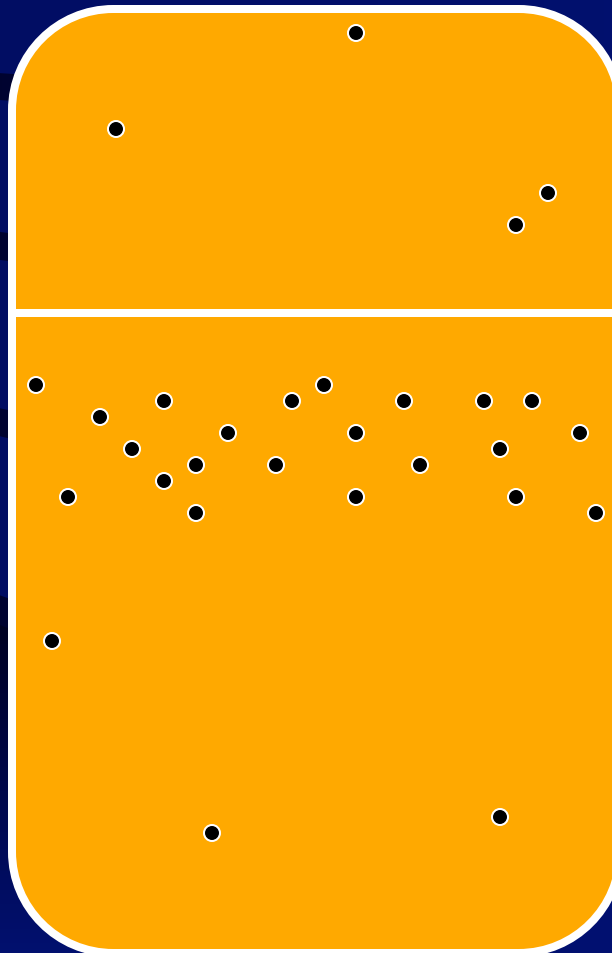
## W-2 Form - Defect Analysis

The marks indicate the number of errors made in each of the respective boxes.

a Control number		OMB No. 1545-0008			
b Employer identification number		1 Wages, tips, other compensation		2 Federal income tax withheld	
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld	
		5 Medicare wages and tips		6 Medicare tax withheld	
		7 Social security tips		8 Allocated tips	
d Employee's social security number		9 Advance EIC payment		10 Dependent care benefits	
e Employee's name, address, and ZIP code		11 Nonqualified plans		12 Benefits included in box 1	
		13		14 Other	
		15 Statutory employee		16 Deceased	
		17 Pension plan		18 Legal rep.	
		19 Defined compensation			
16 Date	Employer's state I.D. no.	17 State wages, tips, etc.	18 State income tax	19 Locality name	20 Local wages, tips, etc.
Form <b>W-2</b> Wage and Tax Statement <b>1998</b>					
Department of the Treasury—Internal Revenue Service					
Copy 1 For State, City, or Local Tax Department					

# Location Checksheet

What caused the paint defects on these refrigerators?



# Matrix Checksheet

## Time Spent per Customer

	<u>Customer</u>		
<u>Time</u>	<u>A</u>	<u>B</u>	<u>C</u>
Respond to Initial Contact	1.5 days	1 day	3 hrs
Planning	8 hrs	12 hrs	6 hrs
Meetings	16 hrs	20 hrs	18 hrs
Project work	50 hrs	65 hrs	86 hrs
Delivery	2 hrs	1.5 hrs	5 hrs
Follow-up	.5 hrs	1 hr	3 hr