

# 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	IIII
Missing Pages	IIII III
Misplaced	II

# Location Checksheet

## W-2 Form - Defect Analysis

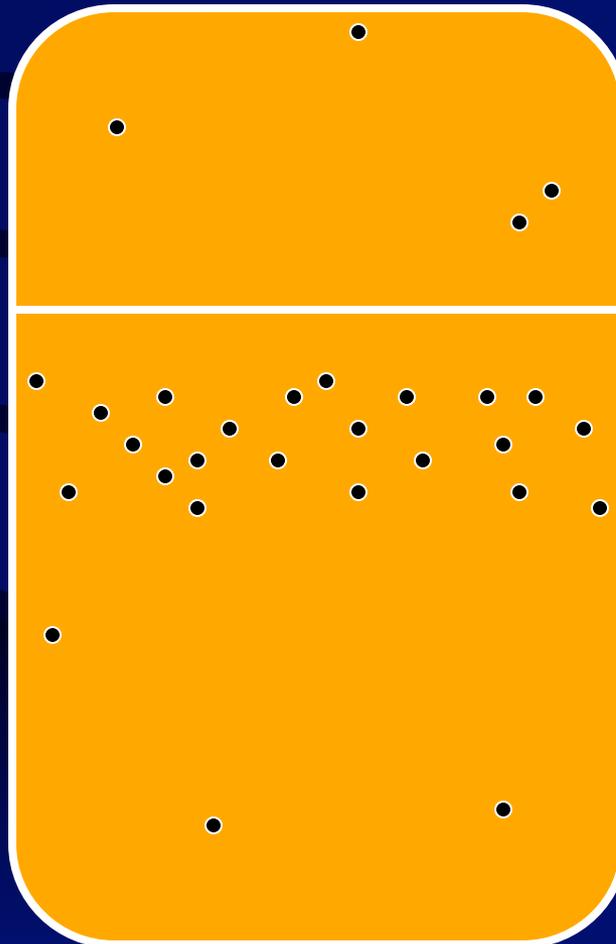
The marks indicate the number of errors made in each of the respective boxes.

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 <input type="checkbox"/>	Deceased <input type="checkbox"/>			
		Partisan <input type="checkbox"/>	Legal rep. <input type="checkbox"/>			
			Deferred compensation <input type="checkbox"/>			
16 State	Employer's state I.D. no.	17 State wages, tips, etc.	18 State income tax	19 Locality name	20 Local wages, tips, etc.	21 Local income tax

Form **W-2** Wage and Tax Statement **1998**  
Copy 1 For State, City, or Local Tax Department  
Department of the Treasury—Internal Revenue Service

# Location Checksheet

What caused the paint defects on these refrigerators?



# Matrix Checksheet

## Time Spent per Customer

### Customer

<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