REPORTS EVALUATION CHECKLIST

REVIEW DATE (DD MMM YY):

REPORT TITLE:

SECTION I - DETERMINE THE NEED			
INSTRUCTIONS: Check either column (b) or (c). If questionable, show changes in column (d). (a)	QUESTION-ABLE (b)	SATISFAC-TORY (c)	PROPOSED CHANGES (d)
1. THE REPORT AS A WHOLE. Who uses it? How? What is its purpose? Should it be continued?	☐	☐	
2. USE OF EACH ITEM. Is every item used? Any missing items to be added?	☐	☐	
3. USE OF EACH COPY. Are all copies used to good advantage?	☐	☐	
4. FUNCTIONAL RELATIONSHIP. Is information within the scope of the office functions?	☐	☐	
5. MISAPPLICATION. Does the report try to solve a problem which should be solved by other means?	☐	☐	
6. STAND-BY DATA. Is the data obtained for "just-in-case" use?	☐	☐	
7. ANOTHER AVAILABLE SOURCE. Is the data available in another report or office?	☐	☐	
8. BY PRODUCT. Is it possible to get the data by some other process?	☐	☐	
9. DIRECT USE OF RECORDS. Could actual records or "last copy" of record be used instead of a report?	☐	☐	
10. SAMPLING. Would a sampling of a few offices give reliable data?	☐	☐	
11. EXCEPTION REPORTING. Would it be appropriate to report conditions only when other than normal?	☐	☐	
12. COMBINATION. Could this report be combined with another report?	☐	☐	
13. NON-RELATED MATERIAL. Are non-related subjects included in the same report?	☐	☐	
14. ADEQUACY AND SUITABILITY. Is scope or content tailored to meet needs?	☐	☐	
15. VALUE VS. COST. Is the report worth its cost?	☐	☐	
SECTION II - VERIFY THE TIMING			
16. REPORTING PERIODS. Are reporting periods properly stated?	☐	☐	
17. FREQUENCY. Is frequency suitable, excessive, or inadequate?	☐	☐	
18. DUE DATE. Is due date specifically stated?	☐	☐	
19. PREPARING OFFICE WORKLOAD. Has this been considered? Can due dates be changed to avoid peak workloads?	☐	☐	
SECTION III - REVIEW STYLE OF PRESENTATION			
20. REPORT TITLE. Is it the same as, or listed in the directive?	☐	☐	
21. PURPOSE OF REPORT. Is it clearly stated?	☐	☐	
22. REPORTING INSTRUCTIONS. Are reporting instructions clear and adequate?	☐	☐	
23. INTEGRATED REPORTING. Are data needs of other levels included?	☐	☐	

REPORTS EVALUATION CHECKLIST (Page 2)

REVIEW DATE (DD MMM YY):

REPORT TITLE:

SECTION III - REVIEW STYLE OF PRESENTATION (CONTINUED)

INSTRUCTIONS: Check either column (b) or (c). If questionable, show changes in column (d). (a)	QUESTION-ABLE (b)	SATISFAC-TORY (c)	PROPOSED CHANGES (d)
24. FEEDER REPORTS. Are procedures for feeder reports provided to assure uniformity and simplicity?	☐	☐	
25. REPORTING UNITS. Are reporting units shown? Are there too many, too few?	☐	☐	
26. NEGATIVE REPORTS. Are negative reports required? What use is made of them?	☐	☐	
27. NUMBER OF COPIES. Are number of copies specified?	☐	☐	
28. ROUTING. Are correct mailing addresses given?	☐	☐	
29. NARRATIVE OR FORM. Is the best format for this report used?	☐	☐	
30. ARRANGEMENT AND SIZE. Are items sequenced according to user need? Is spacing adequate? Are item captions clear? Is size adequate and practical?	☐	☐	
31. STANDARDIZATION. Do all offices use the same forms or format?	☐	☐	
32. SUMMARY INFORMATION. Would a summary of information be better rather than the statistics or a narrative?	☐	☐	
33. CUMULATIVE DATA. Can data be maintained on a cumulative basis to eliminate last-minute workloads?	☐	☐	
34. COMPARISONS. Are comparisons made against goals, past performance, or current performance of others?	☐	☐	
35. GRAPHICS. Are graphics used to good advantage?	☐	☐	
36. AUTHENTICATION. Are verifying or approving officials' signatures used only when necessary?	☐	☐	
37. DATA SOURCES. Are records from which reports are to be prepared identified?	☐	☐	
38. ARRANGEMENT OF RECORDS. Should records be rearranged to simplify reporting?	☐	☐	
39. REPORT SYMBOL. Is it shown after title of report?	☐	☐	
40. STYLE OF PRESENTATION. Does the overall report provide clarity and simplicity?	☐	☐	

Reset Form | Print Form