

# CHECKLIST

## PSA DATA QUALITY

This checklist helps MSPs assess how well their PSA captures the data needed for accurate reporting. Checking all these boxes ensures clean, consistent inputs that drive clear insights and confident, data-driven decisions.

### TIME ENTRY



- ☐ Complete Time Entry / Payroll Wrap
- ☐ Correct Use of Billable / Non-Billable / Covered Time
- ☐ Correct Use of Billable Rates
- ☐ Utilize Worktypes

### GENERAL SETUP



- ☐ Correct Member or Resource Costs
- ☐ Proper Use of Dates on Tickets and Projects
- ☐ Inputting Product Costs
- ☐ Correct Configuration Counts from RMM
- ☐ Applying Vertical Market
- ☐ Establish and Apply Team Roles

### TICKETS



- ☐ Using Type / Subtype / Item OR Issue / Sub-Issue / Item
- ☐ Correct Use of Service Boards or Ticket Categories
- ☐ Configuration Tagged on Tickets
- ☐ Applying Priority & SLA

### AGREEMENTS / CONTRACTS



- ☐ Use of Agreement Types or Categories
- ☐ Use of Additions / Recurring Services
- ☐ Correct Costs
- ☐ Represent User Count

### INVOICES



- ☐ Invoice from PSA
- ☐ Invoice Paid Date on PSA
- ☐ Invoice in "Sent" Status