Spreadsheet and Data QA Checklist

Protect the original, state the transformation, and prove the output still matches the source

Before the AI step

- [ ] Save an untouched copy of the source file.
- [ ] Remove private rows, hidden sheets, comments, author names, and unrelated data.
- [ ] Write the exact transformation: clean, extract, classify, fix, or chart.
- [ ] List the columns, data types, units, date format, decimal convention, and expected row count.

Ask for a change log

Return the cleaned or extracted data in [CSV/XLSX/TABLE] format. Preserve the original values unless a change is required by the rules below. Do not silently fill blanks or guess ambiguous text. Add a change log listing each correction, rejected row, duplicate, uncertain value, and formula change. Mark unreadable or uncertain content [CHECK].

Reconciliation checks

- [ ] Source rows: _____ Output rows: _____ Expected difference: _____
- [ ] Source total: _____ Output total: _____ Difference explained: [ ]
- [ ] Dates, currencies, percentages, negatives, and leading zeros preserved: [ ]
- [ ] Duplicates reviewed instead of automatically deleted: [ ]
- [ ] Formulas checked with small known inputs and edge cases: [ ]
- [ ] Extracted cells spot-checked against the source image or PDF: [ ]

Release decision

- [ ] Errors that remain: _____
- [ ] Manual checks still needed: _____
- [ ] Who approved the output: _____ Date: _____

A clean-looking spreadsheet is not proof that the values, formulas, rows, or totals survived correctly.

Continue on H5W

Source guide: https://www.h5w.com/how-to-clean-up-a-spreadsheet-with-ai/

Clean up a spreadsheet with AI: https://www.h5w.com/how-to-clean-up-a-spreadsheet-with-ai/

Extract a table from a PDF: https://www.h5w.com/how-to-extract-a-table-from-a-pdf-with-ai/

Information last verified: October 18, 2026. This resource is general educational guidance. Check current official rules and professional advice when the decision is high impact.