**Heuristic Checklist for Tech Instructions**

Title & Introduction

❏ Title page/title is formatted according to genre conventions (how to or gerund -ing).

❏ The introduction offers a brief statement of why the document is significant to the reader.

* The reader knows the value of the instructions (the goals that the reader will accomplish with the instructions)

❏ Introduction gives necessary background information, as applicable:

* The reader is given policy background information (if the instructions are for a policy and procedure)
  + Date policy was approved/revised.
  + Authorities overseeing policy (HR, Licensing Organization, Agency).
* The reader is given prefatory information appropriate to carrying out tasks:
  + Time to complete task.
  + Skill level or prerequisites needed.
  + Relevance of task to job/position.
  + Context of use or stage setting.
  + Safety information.
  + Equipment & materials needed.
  + Definition of terms.

Detailed Step-by-Step Instructions (body sections)

❏The body sections offer a detailed explanation of process/procedure:

* The instructions use imperative mood (action verbs) to command the user to \*do\* something (complete the task in smaller steps).
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.
* The instructions use chronological order and numbers each step in the process/procedure; uses decimal system numbers for sub-steps (see Chapter 20).
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.
* The instructions provide ample graphics to support task completion (at least 5).
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.
* The instructions label, caption, cross-reference, and cite graphics.
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.
* The instructions use feedback statements, notes, warnings, etc. appropriately, as needed, and are NOT numbered as steps in the process (but nested between numbered steps).
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.

Conclusion

* The instructions offer a brief closing statement that signals task completion. It provides closure to the reading process.
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.
* The instructions provide supplemental information about one of the following: maintenance tips, troubleshooting help (where to go online/who to call), or information about similar related tasks/topics (where to go online/who to call).
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.

Document Design

* The document uses headings and sub-headings appropriately.
* The document uses balance, contrast, proximity, and alignment appropriately.
* The document uses white space effectively.
* The document uses font appropriately.
* The document uses layout effectively.
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.

Graphics

* The instructions include an overview graphic to orient the reader to the process/procedure.
* The instructions include smaller graphics to illustrate sequential steps in the process/procedure.
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.

Prose/Language

* The document uses a level of wording appropriately for the target audience.
* The document defines jargon or terms that may be unfamiliar to novice audiences (or a mixed audience with semi-skilled and experts).
* The description is free from grammatical and mechanical mistakes.
  + Yes – explain what works well to meet reader & genre expectations
  + No – explain what doesn’t work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.