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)
  - o Date policy was approved/revised.
  - o Authorities overseeing policy (HR, Licensing Organization, Agency).
- 🔵 The reader is given prefatory information appropriate to carrying out tasks:
  - o Time to complete task.
  - o Skill level or prerequisites needed.
  - o Relevance of task to job/position.
  - o Context of use or stage setting.
  - o Safety information.
  - o Equipment & materials needed.
  - o 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
  - o 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
  - o 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).
  - o 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
  - o 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
  - o 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
  - o 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
  - o 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
  - o 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.
  - o 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
  - o No – explain what doesn't work well to meet reader & genre expectations AND what revision suggestions you have to improve the draft.