Checklist

#9997

#10747

Checklist updates

Paper path

Engineering note: The work to update the checklist (links, what's shown or not, and in what order) is part of the work needed to update the IA to accommodate new scope and keep DF easy to navigate. This diagram shows the changes that the Checklist itself requires, but overall these changes are related to other work: • Adding section-level intro pages for each numbered section head in the checklist. Ticket # • Breaking up the Deductions and credits section into two sections: Deductions Ticket # and Credits Ticket # • The ESSAR changes that will impact the signing experience in the "Complete" section Note that the state folks may also have a ticket out there to append a dynamic message at the bottom of this screen to remind folks to file state taxes (if it applies to them). That design is not shown here. It would come after the entire checklist. Terms used: • "Section" refers the the numbered titles in the list, e.g. "You and your family" • "Subsection" refers to the titles within a section, e.g. "About you" and "Spouse" • "Data reveal" is our slang for the text that is shown under a subsection link, like "Jane Doe" shown under the About you subsection link.

