

Job Aid

[The task as a verb phrase, for example: Refund a customer's order]

Job aid number	[e.g. JA-SUP-004]	Version	[1.0]
Used by	[Role]	Related SOP or training	[Name or link, if any]
Owner	[Role, then name]	Last checked	[YYYY-MM-DD]
Where it lives	[Pinned in the tool, at the desk, or a link]	Next review	[YYYY-MM-DD]

Keep the layouts this task needs and delete the others: Steps for a fixed sequence, Checklist for things that must all be true before the work goes out, Decision table for a choice that depends on the situation. Most job aids fit on one page.

1. When to use this job aid

One line each for the task, the moment someone should reach for this sheet, and the result when they are done. A reader should know in a few seconds whether this is the right job aid.

- **Task:** [verb phrase]
- **Use it when:** [the moment, for example: a customer asks for their money back]
- **Done when:** [the result someone could check]

2. Before you start

Only what must be open, ready or true before step 1. Leave out anything the reader already does every day.

- [System or tool, and the access it needs]
- [File, form or information to have open]
- [Condition that must be true, for example: the ticket is assigned to you]

3. Steps

For a fixed sequence. One action per row, starting with a verb, with buttons and fields named exactly as the screen shows them. Say what the reader should see when the step worked. Paste a cropped screenshot under any action where the control is hard to find. Keep it to about ten rows.

Step	Do this	You should see
1		
2		
3		
4		
5		

Step	Do this	You should see
6		
7		
8		

4. Checklist

For things that must all be true, in any order, before the work goes out. Write each item so a person can answer it with a yes or a no, and tick the Done column as they go.

Done	Check	Notes

5. Decision table

For a choice that depends on the situation. One situation per row, as the reader will see it, and exactly what to do. Put the rows that stop the work first; the reader uses the first row that matches.

If	Then	Ask
Anything this table does not cover	Stop and ask.	[Role]

6. Help and changes

Who to ask when the job aid does not fit the situation, and a row for every change, so people can trust that the sheet in front of them is current.

- **Ask for help:** [role or channel]
- **Found a mistake in this job aid?** [where to tell the owner]

Version	Date	What changed	Changed by
1.0	[YYYY-MM-DD]	First version	[Role]

Free job aid template from stepvideo.io/blog/job-aid. Copy it, change it and use it however you like.