Job aid template: four one-page formats with a user test

A job aid template gives people at work the steps, checks, rules or codes for one task at the moment they do it. This kit has a step card, a checklist, a decision table and a quick reference, each blank and filled, a nine-question “aid or training?” check and a five-minute user test.

60 minutes | 2–6 participants | Online and adaptable in person

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The outcome

In 60 minutes a trainer and a subject expert decide whether a task needs a job aid, training or a process fix, draft a one-page aid, test it with two users and leave with a revised version that has an owner and a review date.

Before the session

- For trainers, learning designers and team leads, working with one or two people who do the task well.
- Collect the current instructions, error reports or the questions people ask most about the task.
- Book two testers who have not done the task recently, and a safe practice version of a risky task.
- Accessibility: send plain text for screen readers, let testers stop at any time, never use colour alone.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Aid or training? check
- Blank step card
- Blank checklist
- Blank decision table
- Blank quick reference
- Five-minute user test log
- Filled example: aid or training check
- Filled example: step card
- Filled example: checklist
- Filled example: quick reference
- Filled example: decision table
- Filled example: decision table coverage
- Filled example: user test log
- Facilitator section: run of show, reference tables, debrief and adaptations

Aid or training? check

Answer each question yes or no for each task. Then count the yes answers and read the result. The rule: a yes to question 9 means fix the work first. No yes at all means no need found. No training signal means a job aid alone. A training signal with two or more job aid signals means a job aid plus practice. Anything else means training first.

Task 1, 2 and 3, each in one sentence that starts with a verb

_____

_____

_____

#	Question (answer yes or no)	A yes points to	Task 1	Task 2	Task 3
1	Is the task done less than once a month by the same person, so the details fade?	Job aid			
2	Does it have more than about five steps, values or conditions to remember?	Job aid			
3	Do the steps, codes or limits change at least once a year?	Job aid			
4	Can the person stop and read during the task, safely and without losing face?	Job aid			
5	Must it be done from memory, because there is no time or no safe moment to read?	Training			
6	Does it rely on judgement or a skill that improves only with practice?	Training			
7	Is the person new to the basics, so the words on an aid would mean little to them?	Training			
8	Would a first mistake be costly or unsafe, so people must practise before doing it for real?	Training			
9	Do people who know the steps still get it wrong, because of the tool, the rules, the time or the workload?	Process fix			
	Job aid signals: count the yes answers to 1–4				
	Training signals: count the yes answers to 5–8				
	Result (see the rule above the table)				
	Format, if the result includes a job aid				

Blank step card

Use a step card when the order matters. One action per step, starting with a verb. Say what the person should see when the step worked, and what to do if not.

Task (starts with a verb)

_____

For whom, and at which moment

_____

If this card does not work, ask

_____

Owner, version and last-checked date

_____

#	Do this	You should see	If not
1			
2			
3			
4			
5			
6			
7			
8			

Blank checklist

Use a checklist when the order does not matter but an item is easy to forget. One check per line. Say where to look.

Task (starts with a verb)

_____

For whom, and at which moment

_____

If a check fails, do this or ask

_____

Owner, version and last-checked date

_____

Done	Check	Where to look
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		

Blank decision table

Use a decision table when the right action depends on conditions. Write up to three yes-or-no conditions. Each rule gives every condition Yes, No or Any, and one action. Three conditions make eight combinations: each must match exactly one rule.

Decision (starts with a verb), for whom and when

_____

Condition 1

_____

Condition 2

_____

Condition 3

_____

Owner, version and last-checked date

_____

Rule	If 1	If 2	If 3	Then do this
R1				
R2				
R3				
R4				
R5				
R6				

Blank quick reference

Use a quick reference when people look up a code, a value or a name. Sort the rows the way people search. Add a last row for “none of these”.

Task (starts with a verb), for whom and when

_____

Owner, version and last-checked date

_____

Look up	What it means or what you see	Where or who	Then

Five-minute user test log

One row per tester. Use the test script: 30 seconds to hand over, three and a half minutes to watch and write, one minute for two questions. Change the aid between testers and give it a new version number. The aid is ready when two testers in a row, on the same version, finish without help and without errors.

Aid, task given to the tester and place of the test

_____

Observer

_____

Test	Tester (role)	Aid version	Done without help?	Minutes	Errors	Where they slowed down	What we changed
1							
2							
3							
4							
5							

Filled example: aid or training check

Six fictional tasks from one fictional office building. Four need a job aid, one needs training first and one needs a fix to the work.

#	Question	A yes points to	Hybrid room	Quote	Booking	Returns	Refusal call	Call logging
1	Is the task done less than once a month by the same person, so the details fade?	Job aid	Yes	No	Yes	No	No	No
2	Does it have more than about five steps, values or conditions to remember?	Job aid	Yes	Yes	Yes	Yes	No	Yes
3	Do the steps, codes or limits change at least once a year?	Job aid	No	Yes	Yes	No	No	No
4	Can the person stop and read during the task, safely and without losing face?	Job aid	Yes	Yes	Yes	Yes	No	Yes
5	Must it be done from memory, because there is no time or no safe moment to read?	Training	No	No	No	No	Yes	No
6	Does it rely on judgement or a skill that improves only with practice?	Training	No	No	No	Yes	Yes	No
7	Is the person new to the basics, so the words on an aid would mean little to them?	Training	No	No	No	No	No	No
8	Would a first mistake be costly or unsafe, so people must practise before doing it for real?	Training	No	Yes	No	No	Yes	No
9	Do people who know the steps still get it wrong, because of the tool, the rules, the time or the workload?	Process fix	No	No	No	No	No	Yes
	Job aid signals (yes to 1–4)		3	3	4	2	0	2
	Training signals (yes to 5–8)		0	1	0	1	3	0
	Result		Job aid alone	Job aid plus practice	Job aid alone	Job aid plus practice	Training first	Fix the work first
	Format chosen		Step card	Checklist	Decision table	Quick reference	None	None

Filled example: step card

Fictional. Version 2, after the user test.

Worked example

Set up the hybrid meeting room for a call. For anyone who books room 3, in the five minutes before a meeting starts. If this card does not work, call the office manager on extension 210. Owner: office manager. Version 2, last checked Wednesday 21 October 2026.

#	Do this	You should see	If not
1	Press the power button on the table panel.	The wall screen shows “Room 3” within 30 seconds.	Check that the wall switch by the door is on.
2	Plug your laptop into the cable marked LAPTOP.	Your screen appears on the wall screen.	Press the button marked SOURCE on the panel until it appears.
3	In the call, open Settings, then Devices. Choose “Room 3 camera” and “Room 3 speakerphone” for camera, microphone and speaker.	Your camera preview shows the whole table.	Unplug the USB cable marked CALL and plug it in again.
4	Ask one online person to say a sentence.	You hear them from the ceiling speaker.	Raise the volume on the table panel, not on the laptop.
5	Ask them: “Can you hear the room and see the whole table?”	They say yes to both.	Move the speakerphone to the centre of the table.
6	Turn on captions in the call and say that cameras are optional.	Captions appear on the wall screen.	Tell people how to turn on captions on their own screen.
7	After the meeting, press END on the panel and take the cable out.	The wall screen goes dark within a minute.	Report it on the room fault form.

Filled example: checklist

Fictional; the limits are this team's own. Check a customer quote before you send it. For sales representatives, before a quote goes out. If a check fails and you cannot fix it, ask the sales team lead. Owner: sales team lead. Version 1, checked Thursday 15 October 2026.

Done	Check	Where to look
☐	The customer name and address match the account.	Account page, Details tab
☐	Every line has a product code, a quantity and a unit price.	The quote lines
☐	The discount is 10% or less, or a manager's note approves more.	Discount column; Notes field
☐	The delivery date is a working day, at least five working days from today.	Delivery field; team calendar
☐	The quote is valid for 30 days from today's date.	Valid-until field
☐	The line totals add up to the subtotal, and the tax line is there.	Totals box at the foot of the quote
☐	The terms of sale file is attached.	Attachments list
☐	The file name is QUOTE, the customer name and the date.	Save dialogue

Filled example: quick reference

Fictional; sorted by code, as on the returns label. Sort a returned item by its condition. For the returns bench, on opening a parcel. Owner: returns lead. Version 1, checked Tuesday 27 October 2026.

Code	What you see	Put it here	Then
A	Unopened. The seal is intact.	Resale shelf, bay 1	Refund in full.
B	Opened. All parts there, no marks.	Check bench, bay 2	Refund in full after the bench check.
C	Opened. A part is missing.	Parts bin, bay 3	Ask the returns lead before any refund.
D	Damaged in delivery: the outer box is crushed or torn.	Carrier claim cage	Take two photos, then fill in the carrier claim form.
E	Damaged by use: scratches, stains or wear.	Hold shelf, bay 4	Pass it to the returns lead with the customer's note.
F	Not what the customer ordered: we sent the wrong item.	Resale shelf, after a bench check	Send the right item today. No return label needed.
?	You cannot tell which code fits.	Hold shelf, bay 4	Write "?" on the label and ask the returns lead. Do not guess.

Filled example: decision table

Fictional. Three conditions make eight combinations, and each one matches exactly one rule. The coverage check below shows the first draft, which had a clash and a gap.

Worked example

Approve a course booking request. For the learning coordinator, when a request arrives through the booking form. Conditions: 1. Is the course in the person's development plan? 2. Is the cost within the team's limit per person? 3. Do the dates fall in a blocked period on the team calendar? If none of the rules fits, ask the learning lead. Owner: learning coordinator. Version 1, last checked Monday 5 October 2026.

Rule	If 1: in the plan?	If 2: within the limit?	If 3: blocked dates?	Then do this
R1	Yes	Yes	No	Book it. Tell the line manager the dates.
R2	Yes	Yes	Yes	Ask the line manager to agree the dates. Book when they say yes.
R3	Yes	No	Any	Send it to the budget holder with the plan reference. If the dates are blocked, the line manager agrees them too.
R4	No	Any	Any	Do not book. Ask the person to add it to their development plan with their line manager, then send it again.

Filled example: decision table coverage

Each of the eight combinations, with the rules that match it; the number in brackets is how many. One is right, none is a gap, two or more is a clash. In the first draft, R1 used Any for blocked dates and there was no rule for a course outside the plan, so C1 matched two rules and C5 to C8 matched none.

#	In the plan?	Within the limit?	Blocked dates?	First draft: rules that match	Final: rules that match
C1	Yes	Yes	Yes	R1, R2 (2)	R2 (1)
C2	Yes	Yes	No	R1 (1)	R1 (1)
C3	Yes	No	Yes	R3 (1)	R3 (1)
C4	Yes	No	No	R3 (1)	R3 (1)
C5	No	Yes	Yes	None (0)	R4 (1)
C6	No	Yes	No	None (0)	R4 (1)
C7	No	No	Yes	None (0)	R4 (1)
C8	No	No	No	None (0)	R4 (1)

Filled example: user test log

The fictional step card, tested on Wednesday 21 October 2026 in room 3. A colleague joined the call from another room to play the online person. Two of three testers finished without help; the average time was 2.7 minutes. The card was ready after test 3.

Test	Tester (role)	Aid version	Done without help?	Minutes	Errors	Where they slowed down	What we changed
1	Office assistant, new to the building	v1	No	3.5	1	Step 3: could not find where to choose the room camera. Stopped at time.	Step 3 now names the menus: Settings, then Devices.
2	Sales representative from another floor	v2	Yes	2.5	0	Step 2: looked for the SOURCE button for a few seconds.	Nothing. The pause was short and the step worked.
3	Trainer who had never used room 3	v2	Yes	2.0	0	Nowhere.	Nothing. Ready: two testers in a row on v2.

Facilitator run of show

1 Name the task, the user and the moment | 5 minutes

Ask the subject expert to describe the task in one sentence that starts with a verb. Then say: “Who does this, where are they, and what goes wrong today?” Write one line on top of the check: “When [user] is [doing what, where], they need to [result] without [problem].” If the expert names three tasks, choose the one that goes wrong most often and park the others.

2 Aid or training? Nine questions | 8 minutes

Read the nine questions aloud one by one. The expert answers yes or no; you write. Two minutes for questions 1 to 4, three minutes for questions 5 to 8, one minute for question 9, then two minutes to count and read the result. Say: “A job aid helps people who can already do the task but forget details. It does not teach a skill.” If the result is “Fix the work first”, stop and say: “The steps are known. What gets in the way is [the tool, the rule, the time]. Who owns that?” If the result is “Training first”, plan practice with the course outline template, and come back to an aid afterwards.

3 Choose the format | 5 minutes

Show the four formats. Ask three questions in this order. “Does the order matter?” If yes, use a step card. “Does the right action depend on conditions?” If yes, use a decision table. “Do people look something up, such as a code or a name?” If yes, use a quick reference. Otherwise, use a checklist. If two formats fit, choose the one that matches the most frequent mistake, and write the choice in the last row of the check.

4 Draft the aid on one page | 20 minutes

Five minutes: the expert does or describes the task, step by step, and you write every action, value and condition on the blank format, without editing. Ten minutes: rewrite each line so it starts with a verb and holds one action, and add what the person should see and what to do if not. Use the words on the buttons and labels at work. Five minutes: read the design checklist together and cut everything that explains rather than instructs. Say: “Would someone doing the task need this line at that moment? If not, it goes.” Add the stop-and-ask line, the owner and the version: v1.

5 Five-minute user test, two testers | 12 minutes

Five minutes with the first tester, following the test script: thirty seconds to hand over the aid and the words, three and a half minutes to watch and write, one minute for two questions. The expert watches in silence. Two minutes between testers: change the words where the tester slowed down or made an error, and write v2 on the aid if you changed it. Five minutes with the second tester. Say to each tester first: “We are testing the card, not you.” A tester may stop at any time.

6 Revise and hand over | 10 minutes

Six minutes: read the test log. Fix every step where a tester needed help or made an error, and decide whether the aid is ready: two testers in a row, on the same version, without help and without errors. If it is not ready, name who tests it with whom and by when. Four minutes: fill in a row of the review register: owner, version, last-checked date, review interval and where the aid lives. Ask the owner: “Is this yours, and is the review date right?”

Reference tables

Choose a job aid format

Ask in this order: does the order matter, does the action depend on conditions, do people look something up? If none, use a checklist.

Format	Use it when	Layout	Fictional example in this kit
Step card	The order matters and people skip or swap steps.	Numbered steps, one action each, with what you should see and what to do if not.	Set up the hybrid meeting room
Checklist	The order does not matter, but people forget an item.	Tick boxes, one check each, with where to look.	Check a customer quote before you send it
Decision table	The right action depends on two or three conditions.	One row per rule: the conditions, then the action. Every combination has exactly one rule.	Approve a course booking request
Quick reference	People look up a value, a code or a name, not a sequence.	A lookup table sorted the way people search, with what to do next.	Sort a returned item by its condition

One-page job aid checklist

Read it before the user test. It covers the page, print and screen-reader access.

Point	Check
Title	The title is the task, starting with a verb: “Set up the hybrid meeting room”.
Who and when	One line says who uses it and at which moment.
One page	It fits one side of A4 or Letter. If it does not, split the task or cut the explanation.
One action per line	Each step or check starts with a verb and holds one action.
What success looks like	Steps say what the person should see, so they know the step worked.
Words from the workplace	Buttons, menus and labels are written exactly as they appear at work.
Readable type	At least 12 point in print, high contrast, no text over pictures.
Not colour alone	Colour is never the only signal. Every coloured mark also has a word or a symbol.
Plain text copy	A plain text or tagged version exists for screen readers and for phones.
Stop and ask	It names who to ask when the aid does not fit, and what to do if nobody answers.
Owner and date	A named owner, a version number and a last-checked date are on the page.
Tested	Two testers in a row finished the task with it, without help and without errors.

Five-minute user test script

Five minutes per tester. Test with someone who has not done the task recently. The ready rule is this kit's working rule, not a standard.

Time	What you do	Words to say
0:00–0:30	Give the tester the aid and the task. Nothing else: no demonstration, no tips.	"We are testing the card, not you. Please do the task with only this card. Say what you are thinking if you can. I will stay quiet unless you are stuck for a minute."
0:30–4:00	Watch and write. Note the start time, each pause of more than a few seconds, each error and each question, with the step number. Do not help. If the task needs longer, test the first part only.	If the tester is stuck for a minute: "What would you do now if I were not here?" Then help, and write "No" under done without help.
4:00–5:00	Ask two questions and write the answers in the tester's words.	"Where did you slow down?" "Which word would you change?"
After the test	Change the aid before the next tester and give it a new version number. The aid is ready when two testers in a row, on the same version, finish without help and without errors.	"Thank you. Your pause at step 3 changed the card."

Debrief and next steps

Questions for reflection

- Which line on the aid did the testers never read, and can it go?
- Where did a tester slow down, and was the cause a word, a missing step or the task itself?
- Which task in the check came out as "Fix the work first", and who owns that fix?
- What will tell us, a month from now, that people use the aid: fewer questions, fewer errors or fewer returns to the expert?

Adapt the session

- Working alone with one expert: keep all six steps, but do the user test with one tester today and a second one within a week. Do not call the aid ready after one tester.
- Short version, 30 minutes: skip the format discussion if the check makes the format obvious, draft in 12 minutes and test with one tester for five. Record the second test in the log later.
- Online: share the blank format in a document both people can edit. For a screen task, the tester shares their screen and the observer keeps the camera off. Keep captions on and cameras optional.
- For testers who prefer not to think aloud: let them work in silence, and ask the two questions at the end in writing. A tester may stop at any time, and nobody's name goes in the log, only their role.
- For a team with many aids: run the check for six tasks at once in the Excel version, build the aids with the most yes answers to questions 1 to 4 first, and keep one register for all of them.

After the session

Put the aid where the task happens: on the table, at the bench, or one click from the screen. A week after release, ask two users one question: "When did you last use it, and where did it not help?" Note what changes in the register. On the review date the owner checks every line against the real task and the current system,

then updates the version and the date. If people stop using the aid because they know the task, that is fine: retire it and note that in the register.

Questions people ask

What is a job aid template?

A job aid template is a ready layout for a short reference that people use while they do a task: a numbered step card, a checklist, a decision table or a quick reference table. It holds what is easy to forget, not what needs to be learnt. This kit gives you each of the four as a blank page and a filled example.

When should you use a job aid instead of training?

When people can already do the task but forget steps, values or rules, and can stop and read during the task. Use practice when the task must be done from memory, relies on judgement, or is unsafe to get wrong the first time. If people know the steps and still get it wrong, the problem is often the tool or the workload, and neither an aid nor training will fix it. The nine-question check sorts these cases.

Which job aid format should I choose?

A step card when the order matters, a decision table when the action depends on conditions, a quick reference when people look up a code or a name, and a checklist when the order does not matter but items get forgotten. If two fit, choose the one that matches the most frequent mistake.

How is this different from the facilitator guide template?

A facilitator guide is for the trainer: what to say and do in a session. A job aid is for the person at work, after or instead of the session, at the moment they do the task. If the check says “Training first”, plan the practice with the course outline template; the job aid often follows as the reminder people take back to work.

How do you test a job aid?

Give it to someone who has not done the task recently and ask them to do the task with only the aid, while you watch in silence for about three and a half minutes. Note where they slow down, each error and each question, then ask where they slowed down and which word they would change. Fix the aid before the next tester. In this kit, an aid is ready when two testers in a row finish without help and without errors.

What is included in the free and editable files?

The open PDF has the aid-or-training check, the four blank formats, the user test log, filled examples of each, the decision table coverage check and the 60-minute build session. Subscribers also receive the editable Word file, an Excel workbook with the check, a decision table coverage check, a user test log and a review register that all calculate, and a CSV of the nine questions. The aids are workplace reminders. They are not a controlled procedure, a safety instruction or a legal record.

Use and sharing

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