# How-To Guide Template

Last Modified on 03/31/2026 2:51 pm CDT

Guidance:

[Checklist for creating How-To Guide articles](#)

[Author's Guide: Creating Consistent How-To Guide articles](#)

Tool Search:

This guide explains how to {insert a brief description of the task}.

{Specify when and why your user might want to perform the task.}

{Overview screenshot}

# Before you start

{Use this section as needed. Remember, this is a how-to; this section should be brief and provide links to additional resources/articles.}

- Prerequisite 1
- Prerequisite 2
- Tool Rights statement (we need to add a reusable tool rights statement here and links to the tool rights catalog)

# {Task name}

{*Optional*: Provide a concise description of the purpose of this task. Only include this if the purpose is not clear from the task title.}

{You can use this format to describe your steps:}

1. {Write the step here. Use a verb to start.}

   {Optional: Code sample or screenshot that helps your users complete this step. Do not duplicate screenshots or have screenshots for every step. Only use screenshots for complex how-to guides and narrow the focus to a specific part of the screen.}

   {Optional: The result of completing this step. Not needed for every step. Examples include when printing a report, the report generates as a PDF in a new browser tab, or certification events needing to wait for a response from state edition.}

2. {Write the step here. Use a verb to start.}

   A. {Substep 1}

B. {Substep 2}

## {Impact}

Summary of what you just did...

When the Subtask is an alternate way to accomplish the same task, the impact section should come after the subtask.

## {Sub-task}

{This section is optional for related tasks after completing the main task. Include a sub-task only if the task is big and complex, or is an alternate way. Include a sub-task for an optional step that requires the context of the same page to be useful.}

# What's next

{Include references and/or links to other related documentation such as other how-to guides, conceptual topics, troubleshooting information, and limitation details if any.

- Reference link
- Concept link
- Troubleshooting link