

Court Form Modernization Checklist

This checklist is designed to support courts at different starting points as they work to make court forms easier to use for self-represented litigants and people who use assistive technologies, including screen readers.

Not every court will complete every step.
The goal is not perfection, rather, intentional progress.



Phase 1: Ground the Work Before Making Changes

Before redesigning or remediating any form, courts need shared clarity about what their forms are meant to do and how success will be defined.

Many modernization efforts struggle because they begin with layout or wording changes before addressing more fundamental questions.

A form that looks familiar but is consistently misunderstood, rejected, or inaccessible is not functioning well, regardless of how long it has been in use. This phase asks courts to slow down and make a small set of foundational decisions that will shape all later work. These decisions should be made once, documented, and revisited as needed. Skipping this phase often leads to redesign work that looks better but does not meaningfully improve outcomes for users or staff.

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- We have identified the primary purpose of each form (information intake, information delivery, or procedural compliance).
 - We have identified who uses each form, including self-represented litigants, attorneys, court staff, and external agencies.
 - We have agreed on how success will be measured for each form (accuracy of completion, ease of use, system compatibility, and accessibility).
 - We have explicitly decided for each form whether it should be redesigned, remediated, or replaced.
 - We have documented the reason for that decision.
 - We have identified known constraints, including funding, staff capacity, approval requirements, system limitations, and accessibility obligations.

Phase 2: Organizational Readiness and Governance

Form modernization is as much an organizational effort as a design one. Courts differ in how authority is distributed, but lack of clarity about ownership and approvals consistently slows progress.

This phase focuses on establishing who is responsible for moving the work forward and how decisions will be made. Without clear answers to these questions, teams often spend time revisiting the same issues or waiting for approvals that were never clearly defined.

Governance decisions made early help protect staff time, reduce rework, and prevent redesign efforts from stalling midway through implementation.

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- We have identified a project lead responsible for coordination and decision-making.
 - We have confirmed the project lead's authority level.
 - We have identified who provides input versus who makes final decisions.
 - We have documented the approval process for content changes.
 - We have documented the approval process for layout or design changes.
 - We have documented the approval process for accessibility remediation.

Phase 3: Form Selection and Prioritization

Most courts manage dozens or hundreds of forms and cannot update all of them at once. Prioritization helps ensure effort is focused where it will have the greatest impact.

Some courts have access to detailed usage or rejection data. Others rely primarily on staff experience and anecdotal feedback. Both can be valid inputs when decisions are documented and applied consistently.

The goal of this phase is not perfect ranking. It is shared agreement about why certain forms are addressed first and others later.

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- We have established a consistent method for prioritizing forms.
 - Our prioritization method considers at least one user-focused factor (ex: frequency of use, complexity, impact on self-represented litigants).
 - Our prioritization method considers at least one operational factor (ex: staff burden, rejection rates, technical feasibility)
 - We have identified a manageable initial set of forms to address.

Phase 4: Design and System Compatibility

Design decisions must work within the realities of court technology. Case management systems, PDF workflows, and accessibility tools all impose constraints that shape what is feasible.

Courts often discover system limitations late in the process, resulting in rework or abandoned designs. Testing layouts early helps teams identify which approaches are viable and which will create downstream problems.

This phase emphasizes selecting designs that can be supported over time, even if they are not the most visually ambitious option.

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- We have confirmed which systems each form must work within.
 - We have tested at least one proposed layout against system constraints before finalizing design decisions.
 - We have documented any layout limitations imposed by any necessary applications or case management systems.
 - We have selected the most compatible layout for each form based on testing results.

Phase 5: Accessibility as a Core Requirement

Accessibility is not only about technical compliance. Many of the most meaningful accessibility improvements come from decisions about structure, content, and clarity.

Clear headings, logical progression, and instructions placed at the moment they are needed support screen reader users and also reduce confusion for people unfamiliar with legal processes.

This phase encourages courts to treat accessibility as a guiding principle throughout the design process, not a final remediation step.

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- We have reviewed heading structure for clarity and consistency.
 - We have confirmed that instructions appear directly next to the questions they explain.
 - We have reviewed each form for logical progression from start to finish.
 - We have ensured accessibility considerations informed layout decisions, not only final remediation.
 - We have identified which accessibility tools or methods are used for remediation.
 - We have confirmed that content structure issues are addressed before technical tagging.

Phase 6: User Testing and Feedback

Courts might underestimate how differently forms are experienced by people outside the legal system. Even limited testing can reveal points of confusion that internal teams do not see.

User testing does not need to be large or complex to be valuable. Conversations with a small number of users, staff observations, or short surveys can meaningfully inform improvements.

This phase focuses on listening to real users and using that feedback to make concrete changes.

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- We have gathered feedback from at least one group of people who use court forms.
 - We have included feedback from people without legal training when possible.
 - We have documented usability issues identified through testing or feedback.
 - We have made at least one change based on user feedback.
 - We have identified how feedback will continue to be collected after this phase.

Phase 7: Sustainability and Future Work

Form modernization is ongoing work. Laws change, systems evolve, and user needs shift over time. Courts that plan for sustainability are better positioned to maintain progress without restarting from scratch.

This phase focuses on building internal capacity, documenting decisions, and creating lightweight processes for future updates.

- We have trained more than one person on form update and maintenance processes.
- We have documented design standards or conventions for future use.
- We have identified how future forms will be prioritized for updates.
- We have established a review cycle or trigger for future revisions.
- We have allocated staff time for ongoing maintenance and improvement

Final Check

- We can clearly explain why each form looks the way it does.
- We can explain how accessibility was addressed beyond technical compliance.
- We can identify the next form to address when this work is complete.