

Usable forms

Caroline Jarrett

A bit about me: Caroline Jarrett

My paid-for work:

Consultancy: www.effortmark.co.uk

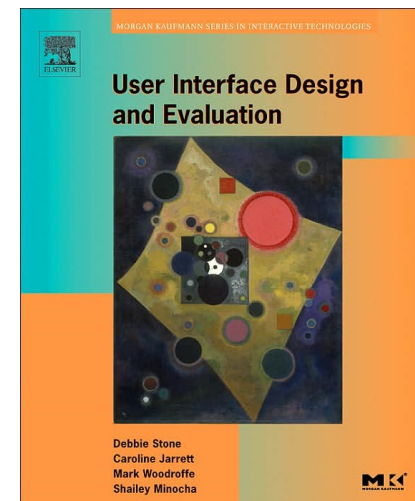
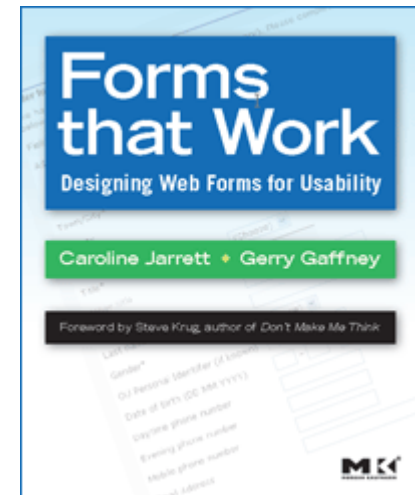
Training: www.usabilitythatworks.com

My free stuff:

Forms advice: www.formsthatwork.com

Editing tips: www.editingthatworks.com

Columns: www.usabilitynews.com
“Caroline’s Corner”



Our feelings towards forms can vary

- Here is a picture of an envelope.
- Do you have any emotional reaction to envelopes like this?
- If so, what?



Three layers of the form

Relationship:

why your organisation has a form
why your user fills it in

Conversation:

the questions and answers

Appearance:

what it looks like

Relationship: why have a form anyway?

Forms organise but also create distance.

- In favour of forms:
 - Reduce personal contact
 - An orderly way of collecting information
 - The start point of a process
 - Finish up as records

- Against forms:
 - Reduce personal contact
 - Create barriers between organisations and people
 - Inflexible: processes change, the form stays the same



Top tip:
find the person who uses the data on the form



Relationship: what makes a user fill them in?



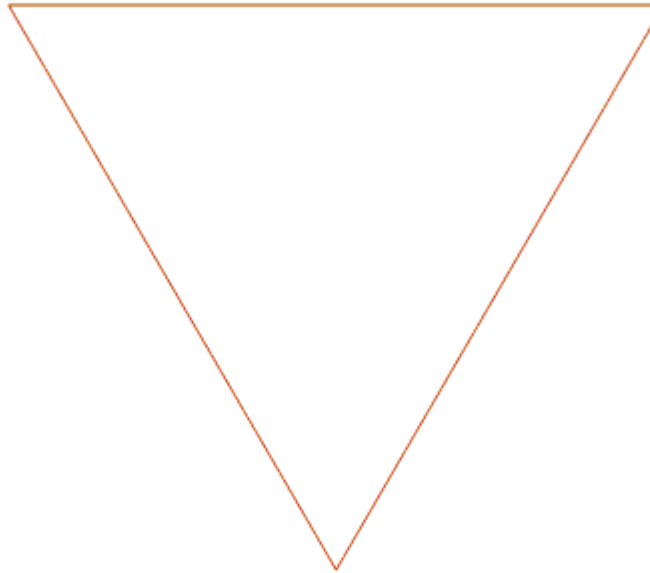
A good form balances rewards and effort

Increase rewards

- Perceived rewards
- Immediate, not deferred

Reduce effort

- Cognitive effort
- Emotional effort



Establish trust

Top tip:
say what the form is for – in your user's words



HM Revenue
& Customs

Pension coding form



HM Revenue
& Customs

Tax Return 2009

Tax year 6 April 2008 to 5 April 2009

Three layers of the form

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An example: problems in conversation

DEPARTMENT OF HOMELAND SECURITY U.S. Customs and Border Protection		OMB No. 1651-0113
Welcome to the United States		
I-94W Nonimmigrant Visa Waiver Arrival/Departure Form		
Instructions		
This form is to be completed by every nonimmigrant visitor not in possession of a visitor's visa, who is a national of one of the countries enumerated in 8 CFR 217. The airline can provide your with the current list of eligible countries.		
Type or print legibly with pen in ALL CAPITAL LETTERS. USE ENGLISH		
This form is in two parts. Please complete both the Arrival Record, items 1 through 11 and the Departure Record, items 14 through 17. The reverse side of this form must be signed and dated. Children under the age of fourteen must have their form signed by a parent/guardian.		
Item 7 - If you are entering the United States by land, enter LAND in this space. If you are entering the United States by ship, enter SEA in this space.		
Admission Number		
148403797 12		
Arrival Record		
VISA WAIVER		
1. Family Name		
2. First (Given) Name		3. Birth Date (day/month/year)
4. Country of Citizenship		5. Sex (male or female)
6. Passport Number		7. Airline and Flight Number
8. Country Where You Live		9. City Where You Bounded
10. Address While in the United States (Number and Street)		
11. City and State		
Government Use Only		
12. 13.		
CBP Form I-94W (10/04)		
OMB No. 1651-0113		
Departure Number		
148403797 12		
DEPARTMENT OF HOMELAND SECURITY U.S. Customs and Border Protection		
VISA WAIVER		
14. Family Name		
15. First (Given) Name		16. Birth Date (day/month/year)
17. Country of Citizenship		
CBP Form I-94W (10/04)		
See Other Side		Staple Here

Example: problems in conversation

Welcome to the United States

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Item 7 - If you are entering the United States by land, enter **LAND** in this space. If you are entering the United States by ship, enter **SEA** in this space.

An example: problems in conversation

Do any of the following apply to you? (Answer Yes or No)

- A. Do you have a communicable disease; physical or mental disorder; or are you a drug abuser or addict? ☐ YES ☐ NO
- B. Have you ever been arrested or convicted for an offense or crime involving moral turpitude or a violation related to a controlled substance; or been arrested or convicted for two or more offenses for which the aggregate sentence to confinement was five years or more; or been a controlled substance trafficker; or are you seeking entry to engage in criminal or immoral activities? ☐ YES ☐ NO
- C. Have you ever been or are you now involved in espionage or sabotage; or in terrorist activities; or genocide; or between 1933 and 1945 were you involved, in any way, in persecutions associated with Nazi Germany or its allies? ☐ YES ☐ NO
- D. Are you seeking to work in the U.S.; or have you ever been excluded and deported; or been previously removed from the United States; or procured or attempted to procure a visa or entry into the U.S. by fraud or misrepresentation? ☐ YES ☐ NO
- E. Have you ever detained, retained or withheld custody of a child from a U.S. citizen granted custody of the child? ☐ YES ☐ NO
- F. Have you ever been denied a U.S. visa or entry into the U.S. or had a U.S. visa cancelled? If yes, ☐ YES ☐ NO
when? _____ where? _____
- G. Have you ever asserted immunity from prosecution? ☐ YES ☐ NO

IMPORTANT: If you have answered "YES" to any of the above, please contact the American Embassy BEFORE you travel to the U.S. since you may be refused admission into the United States.

Family Name (Please Print)	First Name
Country of Citizenship	Date of Birth

WAIVER OF RIGHTS: I hereby waive any rights to review or appeal of an immigration officer's determination as to my admissibility, or to contest, other than on the basis of an application for asylum, any action in deportation.

CERTIFICATION: I certify that I have read and understand all the questions and statements on this form. The answers I have furnished are true and correct to the best of my knowledge and belief.

Signature	Date
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Public Reporting Burden - The burden for this collection is computed as follows: (1) Learning about the form 2 minutes; (2) completing the form 4 minutes for an estimated average of 6 minutes per response. If you have comments regarding the accuracy of this estimate, or suggestions for making this form simpler, you can write to INS, 425 I Street, N.W., Rm. 5304, Washington, D.C. 20536; and the Office of Management and Budget, Paperwork Reduction Project, OMB No. 1115-0148, Washington, D.C. 20503.

Departure Record

Important - Retain this permit in your possession; you must surrender it when you leave the U.S. Failure to do so may delay your entry to the U.S. in the future. You are authorized to stay in the U.S. only until the date written on this form. To remain past this date, without permission from Immigration authorities, is a violation of the law. Surrender this permit when you leave the U.S.

- By sea or air, to the transportation line;
- Across the Canadian border, to a Canadian Official;
- Across the Mexican border, to a U.S. Official.

WARNING: You may not accept unauthorized employment; or attend school; or represent the foreign information media during your visit under this program. You are authorized to stay in the U.S. for 90 days or less. You may not apply for: 1) change of nonimmigrant status; 2) adjustment of status to temporary or permanent resident, unless eligible under section 301(b) of the INA; or 3) an extension of stay. Violation of these terms will subject you to deportation.

Port:
Date:
Carrier:
Flight #/Ship Name

Do any of the following apply to you? (Answer Yes or No)

- A. Do you have a communicable disease; physical or mental disorder; or are you a drug abuser or addict? ☐ YES ☐ NO
- B. Have you ever been arrested or convicted for an offense or crime involving moral turpitude or a violation related to a controlled substance; or been arrested or convicted for two or more offenses for which the aggregate sentence to confinement was five years or more; or been a controlled substance trafficker; or are you seeking entry to engage in criminal or immoral activities? ☐ YES ☐ NO
- C. Have you ever been or are you now involved in espionage or sabotage; or in terrorist activities; or genocide; or between 1933 and 1945 were you involved, in any way, in persecutions associated with Nazi Germany or its allies? ☐ YES ☐ NO
- D. Are you seeking to work in the U.S.; or have you ever been excluded and deported; or been previously removed from the United States; or procured or attempted to procure a visa or entry into the U.S. by fraud or misrepresentation? ☐ YES ☐ NO
- E. Have you ever detained, retained or withheld custody of a child from a U.S. citizen granted custody of the child? ☐ YES ☐ NO
- F. Have you ever been denied a U.S. visa or entry into the U.S. or had a U.S. visa cancelled? If yes, ☐ YES ☐ NO
when? _____ where? _____
- G. Have you ever asserted immunity from prosecution? ☐ YES ☐ NO

Top tips for a better conversation

- Ask questions that the users can answer
 - from their own heads
 - from materials that are to hand at the time they fill in the form
- Use plain language
 - write to this particular user as an individual
 - use a consistent, neutral-to-friendly tone of voice
- Offer help
 - on the web, with a specific web link
 - on the phone, with a real person
 - in person

Three layers of the form

Relationship:

why your organisation has a form
why your user fills it in

Conversation:

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Appearance:

what it looks like

If you can't read it, you can't use it

- We just learned about:
 - contrast
 - size
 - style
- Offer other formats
- Put the message about large print in

large print

Hilton

How about Breakfast in Bed?

To pre-order breakfast in your room please hang this order form on the outside of your door before 2:00am.

DESIRED SERVICE TIME

<input type="checkbox"/> 6.15 - 6.45am	<input type="checkbox"/> 7.45 - 8.15am	<input type="checkbox"/> 8.45 - 9.15am
<input type="checkbox"/> 6.45 - 7.15am	<input type="checkbox"/> 8.15 - 8.45am	<input type="checkbox"/> 9.15 - 9.45am
<input type="checkbox"/> 7.15 - 7.45am		

Cooked breakfast is available after 7am.

CONTINENTAL BREAKFAST *Kellogg's* **£12.50**

JUICES

<input type="checkbox"/> Orange Juice	<input type="checkbox"/> Tomato Juice	<input type="checkbox"/> Grapefruit Juice
---------------------------------------	---------------------------------------	---

COLD SELECTION

<input type="checkbox"/> Cornflakes	<input type="checkbox"/> All Bran	<input type="checkbox"/> Special K
<input type="checkbox"/> Branflakes	<input type="checkbox"/> Muesli	<input type="checkbox"/> Fruit Yoghurt
<input type="checkbox"/> Weetabix	<input type="checkbox"/> Grapefruit Segments	<input type="checkbox"/> Prunes

FROM OUR BAKERY

<input type="checkbox"/> Danish Pastry	<input type="checkbox"/> Morning Roll	<input type="checkbox"/> Croissant
<input type="checkbox"/> White Toast	<input type="checkbox"/> Pain au Chocolat	<input type="checkbox"/> Brown Toast

BEVERAGES

<input type="checkbox"/> Coffee	<input type="checkbox"/> Decaffeinated Coffee	<input type="checkbox"/> Tea
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COOKED BREAKFAST available from 7 am **£16.50**

Includes your choice from the Continental Breakfast together with fresh eggs either fried or scrambled. You can also choose from the following:

<input type="checkbox"/> Fried eggs	<input type="checkbox"/> Scrambled eggs	<input type="checkbox"/> Tomato
<input type="checkbox"/> Mushrooms	<input type="checkbox"/> Baked Beans	<input type="checkbox"/> Hash Brown
<input type="checkbox"/> Black Pudding	<input type="checkbox"/> Pork Sausage	<input type="checkbox"/> Vegetarian Sausage
<input type="checkbox"/> Back Bacon		

SPECIAL REQUESTS _____

AUG 2009HJ02176

Number of breakfasts ordered: _____ Please charge my account _____

Guest Name: _____ Room No: _____

For guests who have paid for a bed and breakfast stay, there will be a small charge of £5.00 per room for room service.

Hilton UK liaise closely with our food suppliers to ensure ingredients do not include genetically modified maize or soya. For those people with special dietary requirements, special requests or allergies, who may wish to know about ingredients used, please ask for a supervisor, who will be happy to help you.

Reading is different from using

- I will give you ONE of these two tasks:
 - “Look for something to help you plan your assignment”
 - “Find out how to contact the Open University”



Assignments and exams

Preparing for your assignments

- [Types of assignment](#) – Essay style questions, reports, oral assignments, short-answer questions.
- [Understanding the question](#) – know exactly what the assignment question is asking you to do.
- [Stages in planning assignments](#) – how to organise yourself and your materials. Contains examples of essay-style assignments.

The craft of writing

- [Write like a professional](#) – using supporting evidence, paraphrasing, quotes and referencing.
- [Use the appropriate writing style](#) – how to express yourself.
- [Introductions and conclusions](#) – what they are meant to do.
- [Dividing your work into paragraphs](#) – know when a paragraph should start and end.
- [Using linking words](#) – how to make your logic flow.
- [English for learning](#) – need help with grammar and spelling?
- [Reading list](#) – for more help with assignment writing



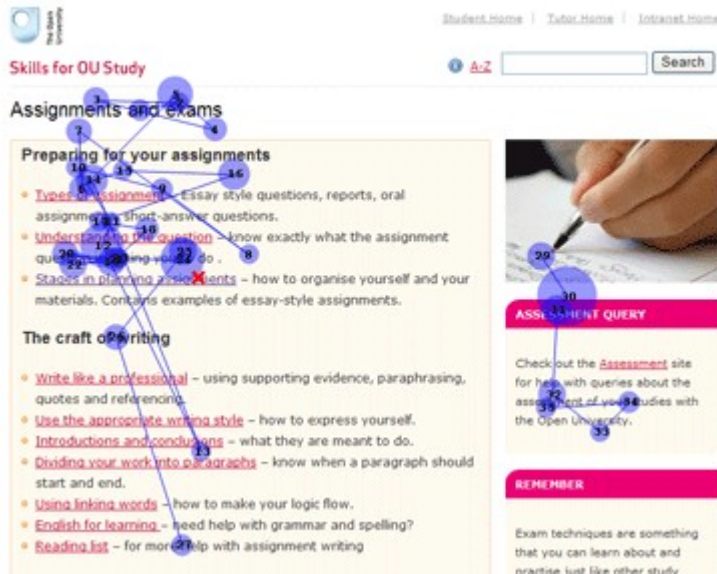
ASSESSMENT QUERY

Check out the [Assessment](#) site for help with queries about the assessment of your studies with the Open University.

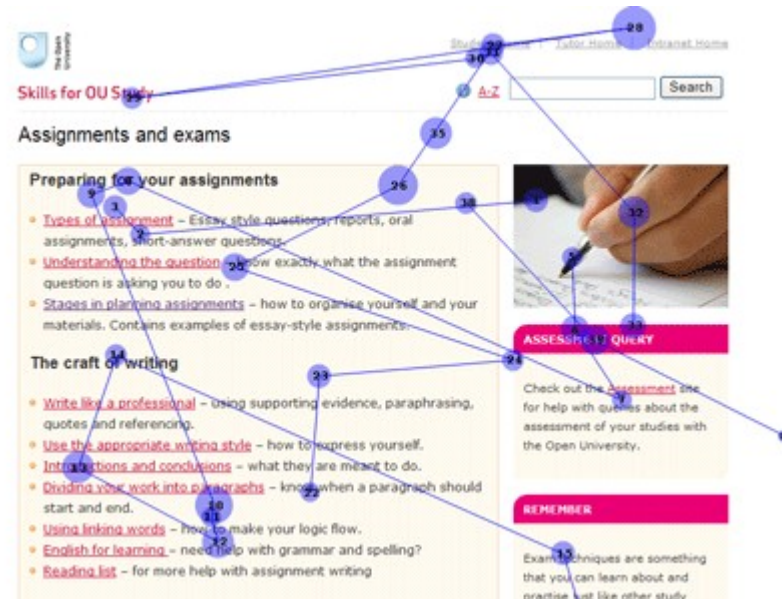
REMEMBER

Exam techniques are something that you can learn about and

User never glances at the header until the task requires header-type information



Looking for 'planning'



Looking for 'contact us'

Reading forms is different from using them

File Edit View Go Bookmarks Tools Help

http://library.cornwall.gov.uk/www-bin/www_talis

Getting Started Latest Headlines

CORNWALL LIBRARY

Author/Title

Author/Keyword

Title

Keyword

Author

Classification

Control Number

Borrower Info

Help

Main

Back Forward

Talis Information Ltd

Author Search

Author eg. *Shakespeare, William*
or *Dickens, C*

Collection

Main Catalogue
Childrens
Audio/Visual

Begin Search Clear entry

[Limit by Date](#) [Limit by Language](#) [Limit by Format](#) [Limit by Opus](#)

Top tip: test the form – ideally where it will be used

Completing the I-94W U.S. Immigration Form



First Name: Kurmann
First Name: Reto
Country of Residence: Switzerland
Hotel Name: Miami International
Address: Northwest 25th Street
City: Miami
State: Florida

Passport Number: 211592156117

Doing the usual paperwork aboard Swiss flight LX 64 from Zurich, Switzerland to Miami, FL on November 17, 2007.

We found 20 photos matching [i-94w](#).
Click "search" above to see!



Uploaded on November 27, 2007
by [Reto Kurmann](#)

Reto Kurmann's photostream



2,998
uploads



browse

This photo also belongs to:

2007 Florida Vacations (Set)



346
items



browse

Tags



[Immigration Forms](#)

An improved form

- Reorganised
 - separated employer and employee sections
 - boxes around topics
- Better wording
- Direct links to online help for employer
- Shows how hard forms design can be

Section one To be completed by the employee

Please complete section one and then hand the form back to your present employer. If you later receive a form P45 from your previous employer, hand it to your present employer.
Use capital letters when completing this form.

Your details

National Insurance number

This is very important in getting your tax and benefits right

Title - enter MR, MRS, MISS, MS or other title

Surname or family name

First or given name(s)

Gender. Enter 'X' in the appropriate box

Male ☐ Female ☐

Date of birth DD MM YYYY

Address

House or flat number

Rest of address including house name or flat name

Postcode

Your present circumstances

Read all the following statements carefully and enter 'X' in the one box that applies to you.

A - This is my first job since last 6 April and I have not been receiving taxable Jobseeker's Allowance or taxable Incapacity Benefit or a state or occupational pension.

☐

OR

B - This is now my only job, but since last 6 April I have had another job, or have received taxable Jobseeker's Allowance or Incapacity Benefit. I do not receive a state or occupational pension.

☐

OR

C - I have another job or receive a state or occupational pension.

☐

Student Loans

If you left a course of Higher Education before last 6 April and received your first Student Loan instalment on or after 1 September 1998 and you have not fully repaid your Student Loan, enter 'X' in box D. (If you are required to repay your Student Loan through your bank or building society account do not enter an 'X' in box D.)

☐

Signature and date

I can confirm that this information is correct

Signature

Date DD MM YYYY

Questions?

Caroline Jarrett

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01525 370379

I'm a consultant, hire me:

Consultancy: www.effortmark.co.uk

Training: www.usabilitythatworks.com

Free stuff:

Forms advice: www.formsthatwork.com

Editing: www.editingthatworks.com

Columns: www.usabilitynews.com
"Caroline's Corner"