

Design tips for complex forms at APPU

Caroline Jarrett

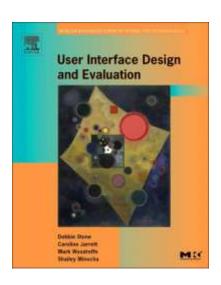
Associação Portuguesa de Profissionais de Usabilidade, Lisbon

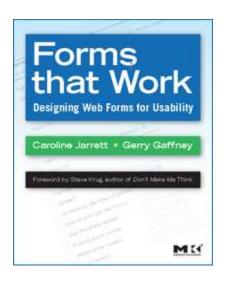
Versions of this presentation

- I gave this presentation at a meeting of APPU
 (Associação Portuguesa de Profissionais de Usabilidade) in Lisbon, Portugal in October 2010.
- There is a longer version, for the Clarity 2010 preconference seminar on Health and Social Services.
 - Some different examples
 - More tips.
- There is a shorter version that I gave at the main Clarity2010 conference.
- All versions are available at: http://slideshare.net/cjforms

Caroline Jarrett

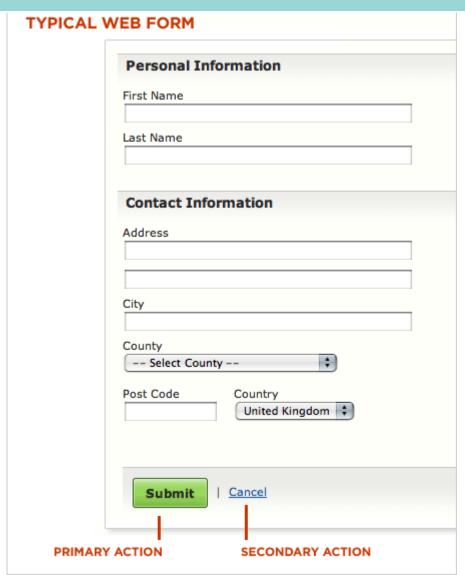
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A lot of forms advice is about forms like this...



So what happens if we have to work with this?



A complex form

- Lasting power of attorney for health and personal affairs
 - "Living will"

What's in this creation pack along with this guidance:

Information sheet



LPA form



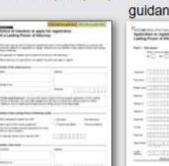
Continuation sheets



on sheets How to register your LPA



LPA 001 (5 copies)

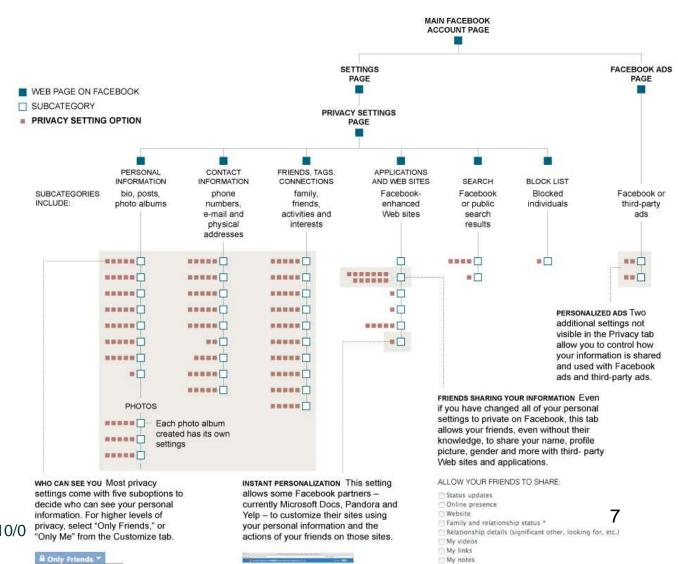


LPA 002 Registration form and related guidance



A complex form

 Privacy on Facebook



http://www.nytimes.com/interactive/2010/0 5/12/business/facebook-privacy.html

Relationship

Good forms help users to achieve their goals

Tip: Give them a form when they want a form

The challenge:

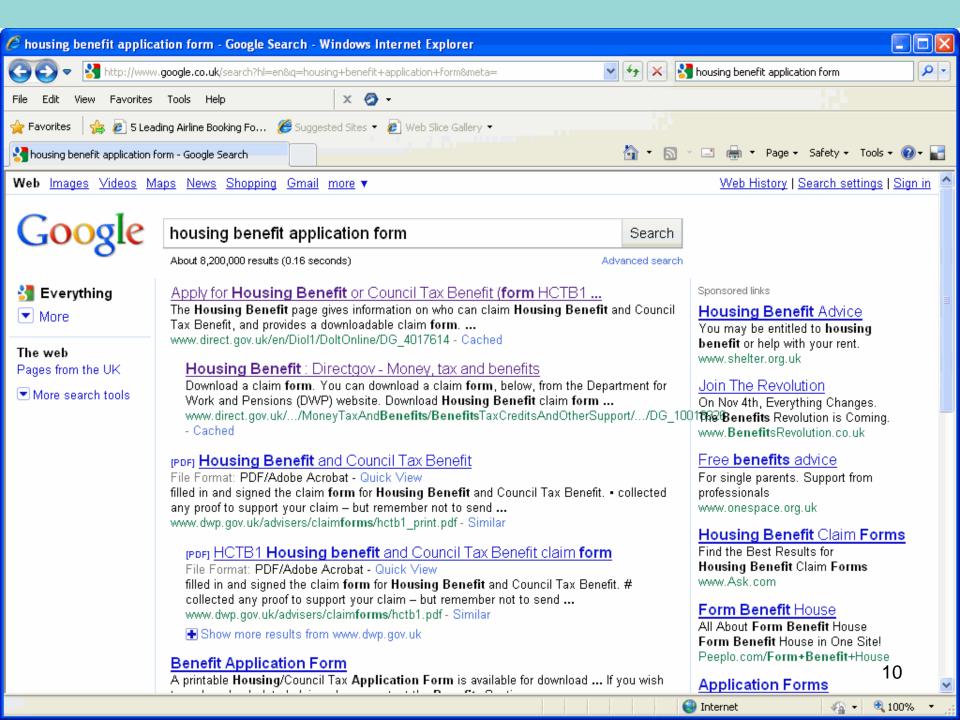
There are many different forms e.g. according to type of application, jurisdiction, eligibility

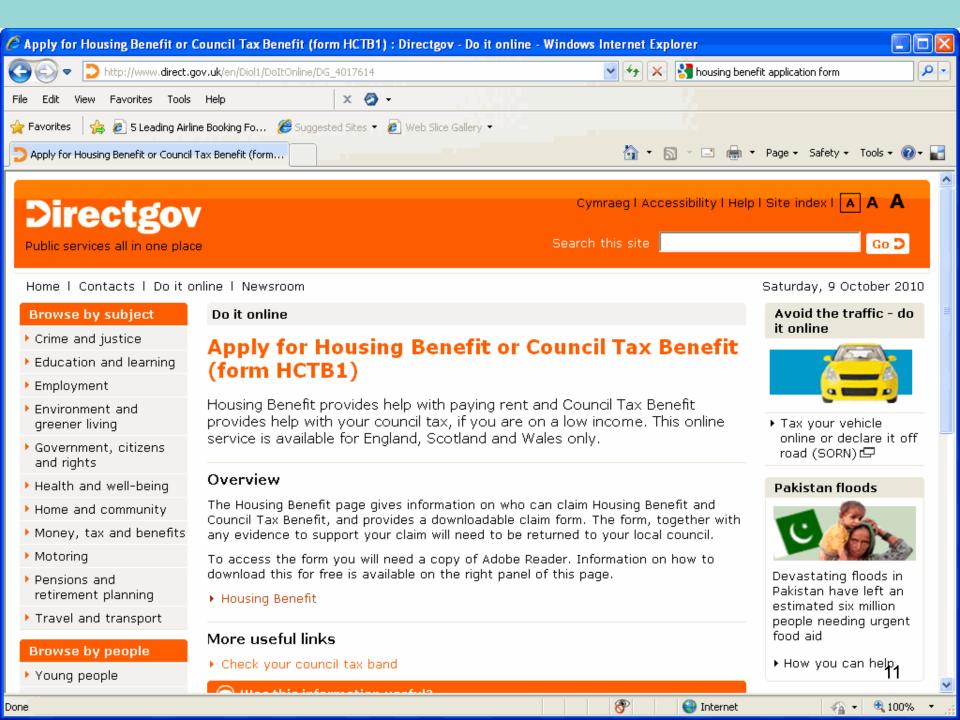
The idea:

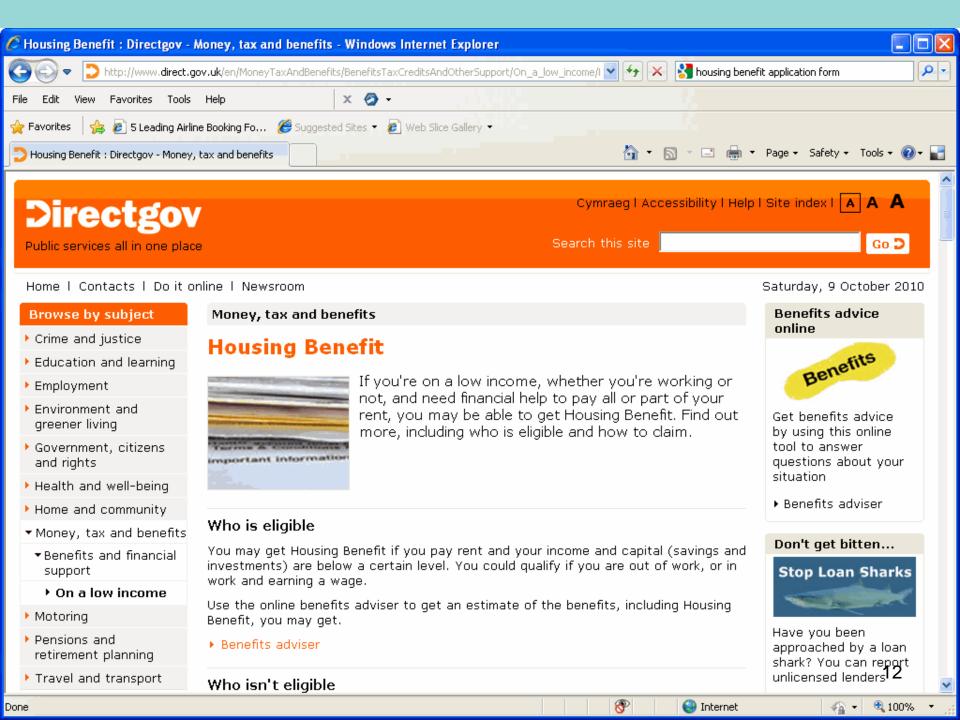
- Make sure that you have a single decision page
- Get users answering questions as quickly as possible

Examples:

Finding a housing benefit form







The link I needed was on that page, but required scrolling. A lot.



If you're not claiming other benefits

If you're not claiming Pension Credit, Income Support, Employment and Support Allowance or Jobseeker's Allowance you can get a form for Housing Benefit and Council Tax Benefit (including Second Adult Rebate) from your local council.

- Find your local council
- ▶ Council Tax Benefit.

Download a claim form

You can download a claim form, below, from the Department for Work and Pensions (DWP) website.

- Download Housing Benefit claim form (PDF document 179 K)
- Download the interactive Housing Benefit claim form
- ▶ Help with PDF files

Claiming in advance

If you know you're moving to a new address, you can claim Housing Benefit up to 13 weeks (17 weeks if you're aged 60 or over) before you move.

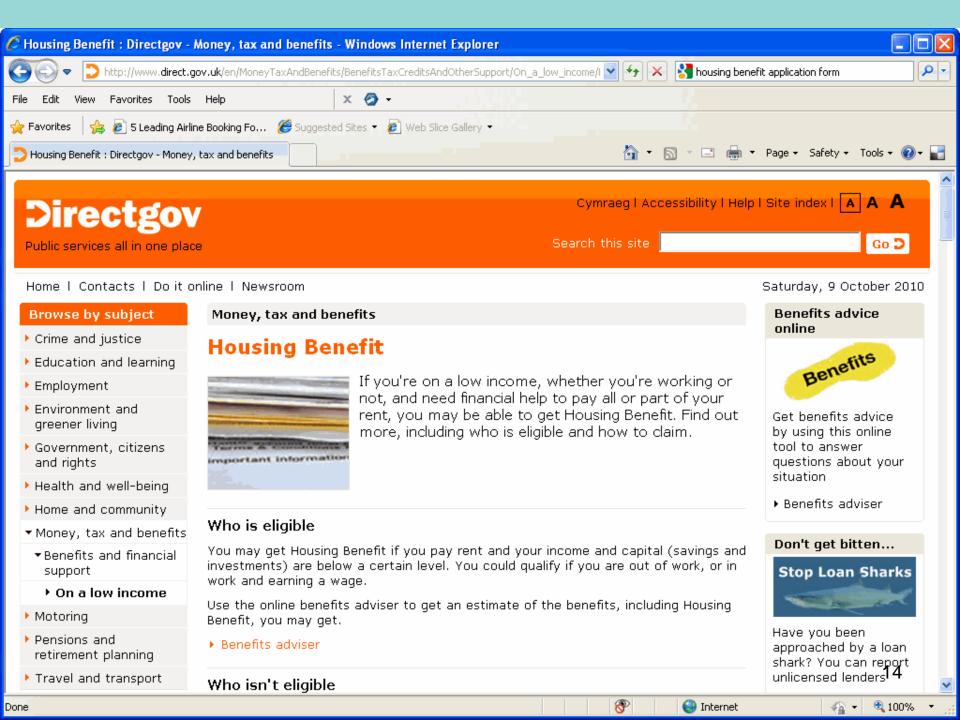
You won't usually get any money before you move in.

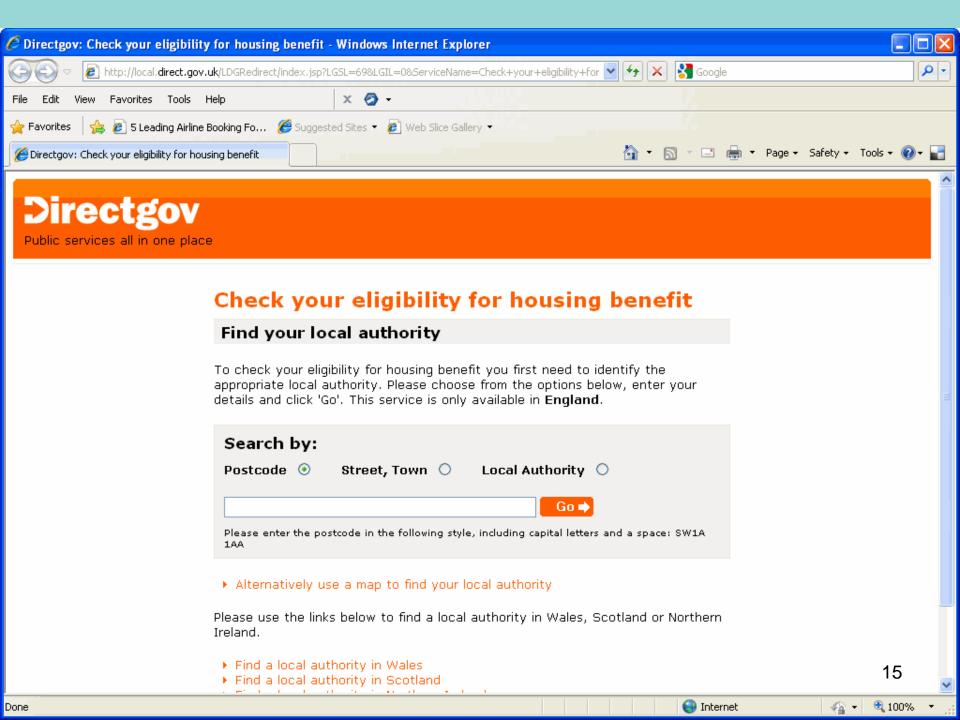
Backdating your claim

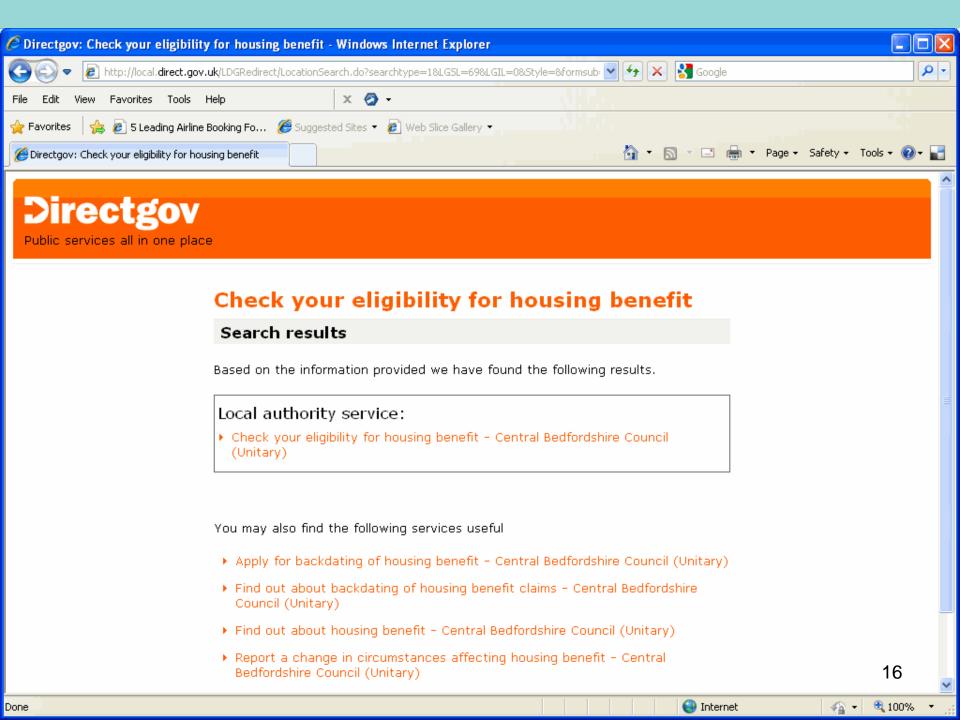
You may be eligible to get your claim backdated. Your local authority can advise you on this.

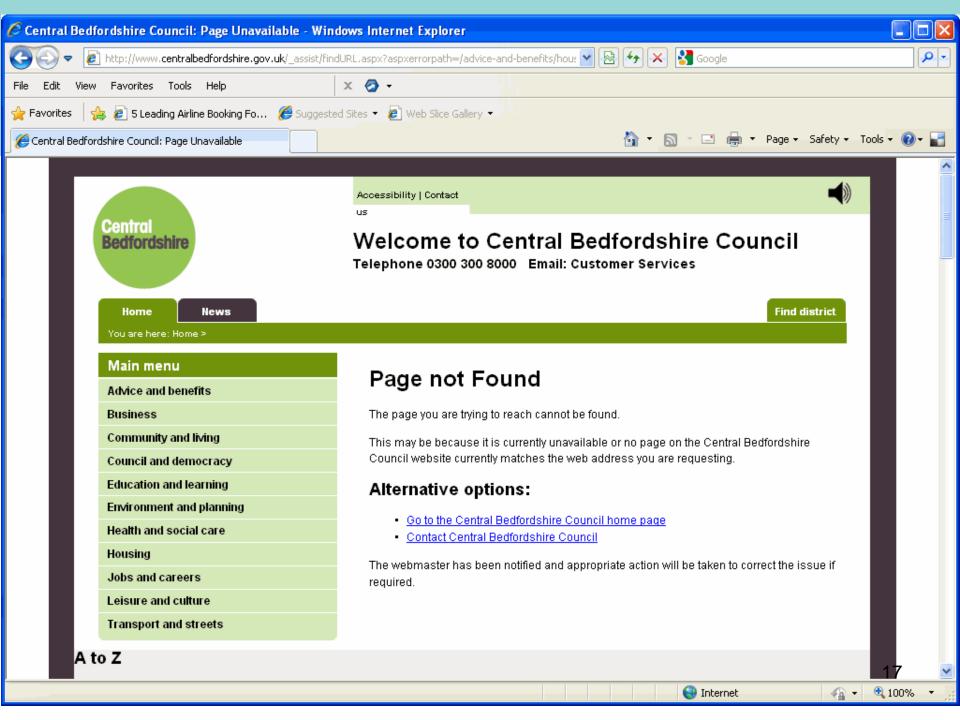
The following links will let you enter details of where you live and then take you to your local authority website where you can find out more.

- Find out about backdating of Housing Benefit claims
- Apply for backdating of Housing Benefit









Tip: Find out how other sites deal with the problem

The challenge:

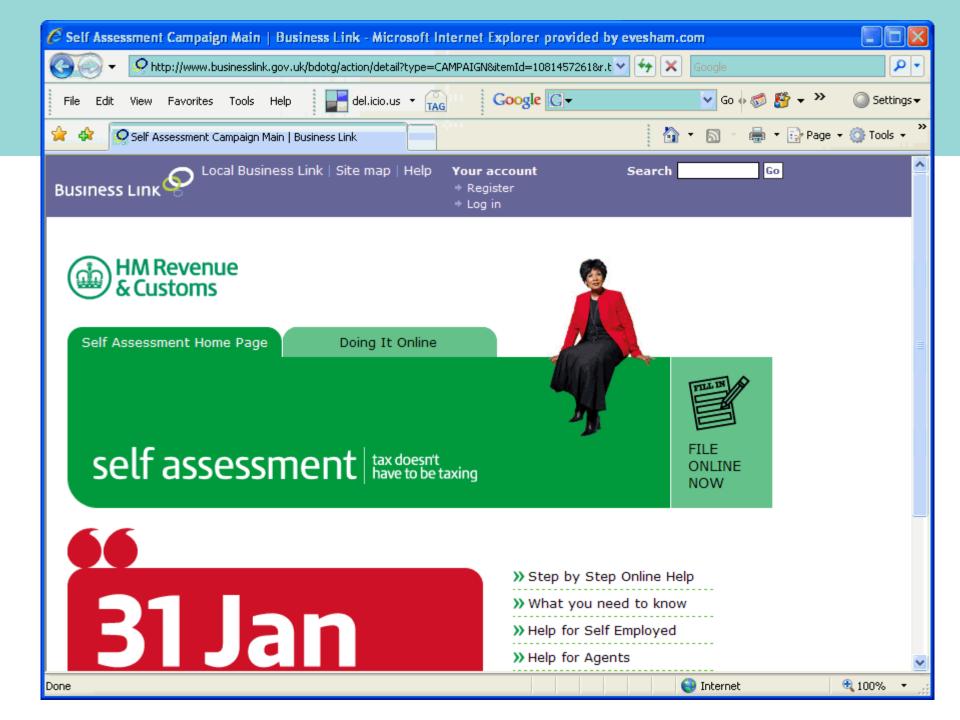
You have a multi-step process. Can you simplify it?

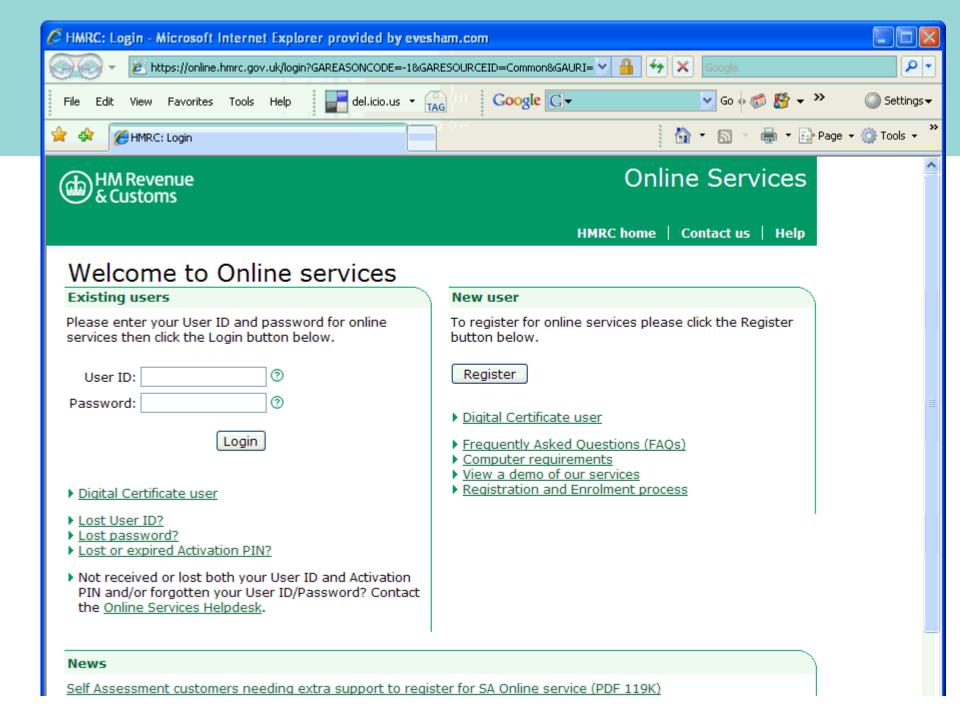
The idea:

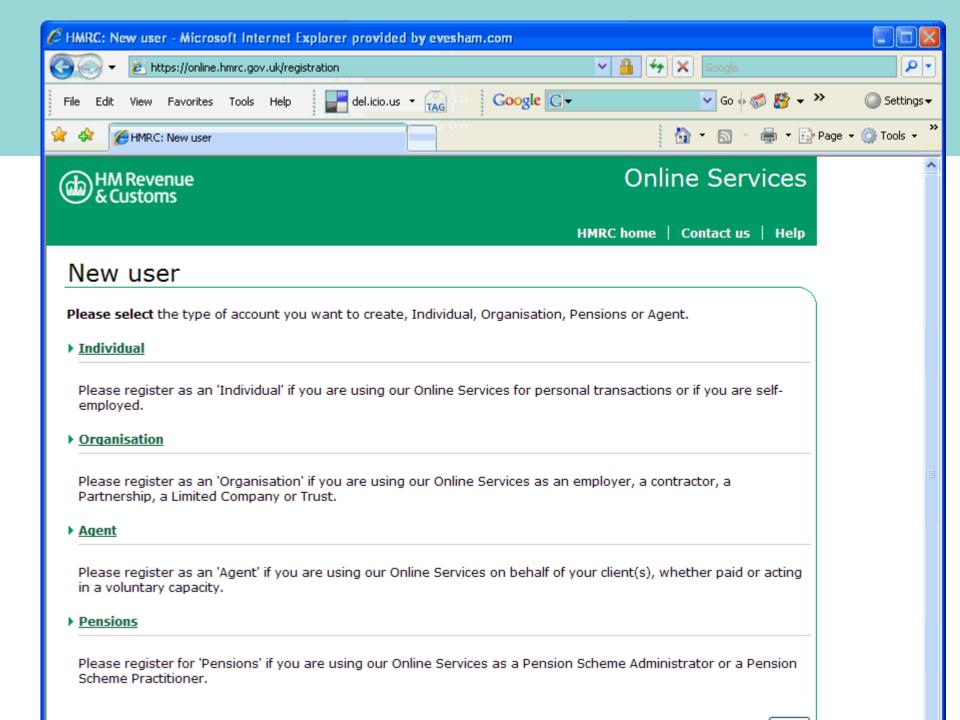
- Look for other examples of similar problems
- Use them for inspiration

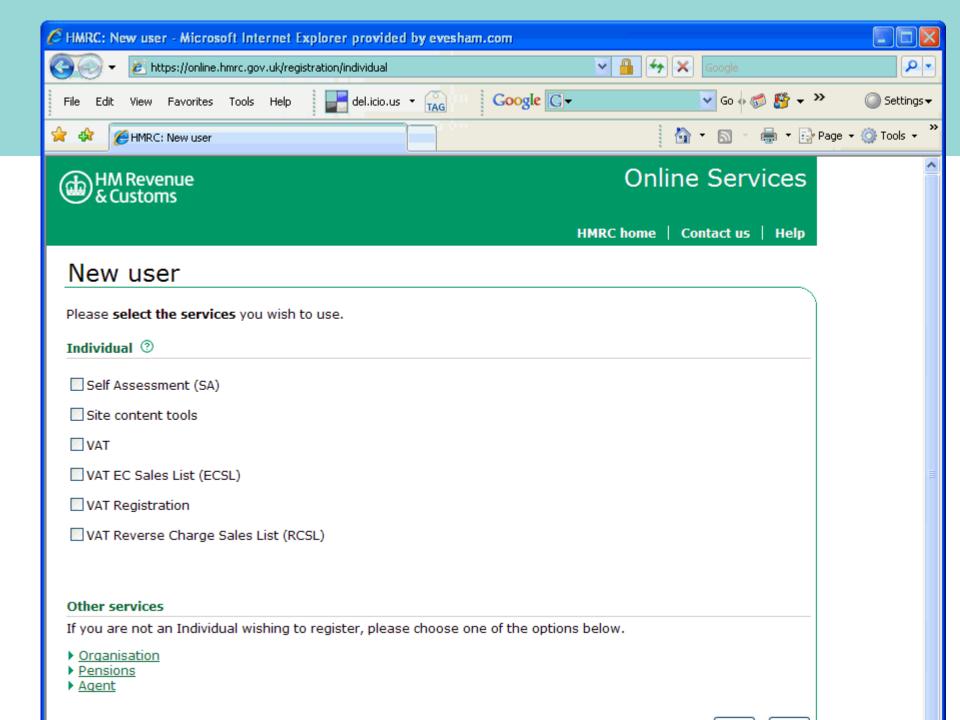
Examples:

Get a username and password to file tax online









Online Services

HMRC home | Contact us | Help

What you will need to enrol

You have chosen to enrol for the services shown below. To change these click 'Back'. Please have the required information shown below to complete enrolment and then click 'Next'.

Individual

Self Assessment (SA)

You will need your:

• Unique Taxpayer Reference (UTR) ?

plus either your

Activation Token ②

or

National Insurance Number ??

or

Postcode

If you have been sent an activation token by us through the post this will allow you to use the service immediately. In these circumstances, you will need your Activation token and UTR only.

If none of the above apply to your circumstances please contact our <u>Online Services</u> Helpdesk.

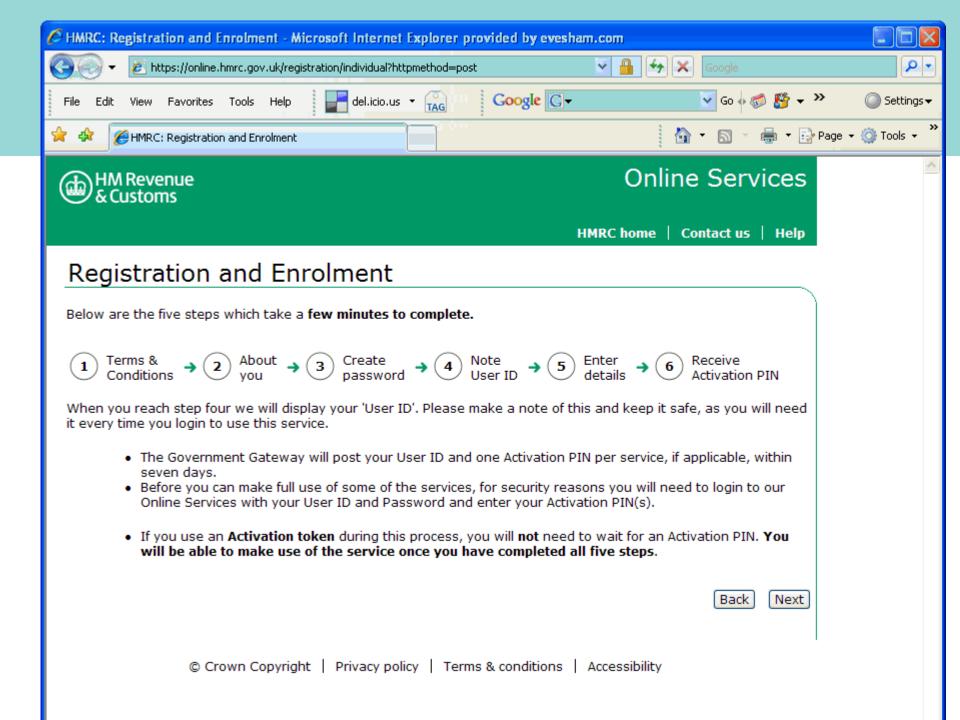
Tip:

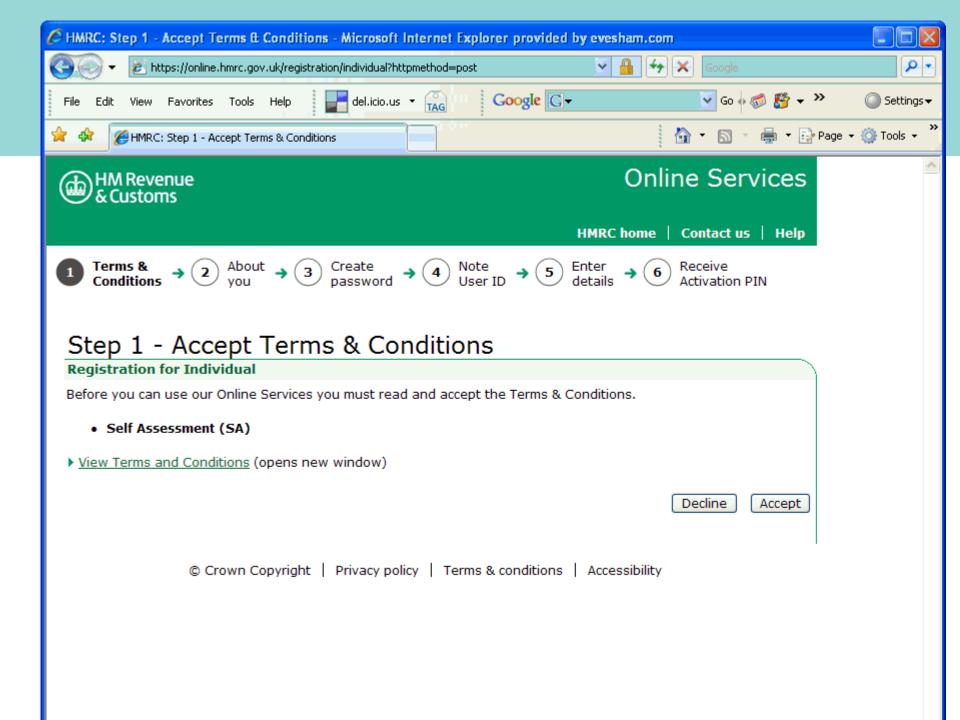
Provide a list of materials for users to assemble

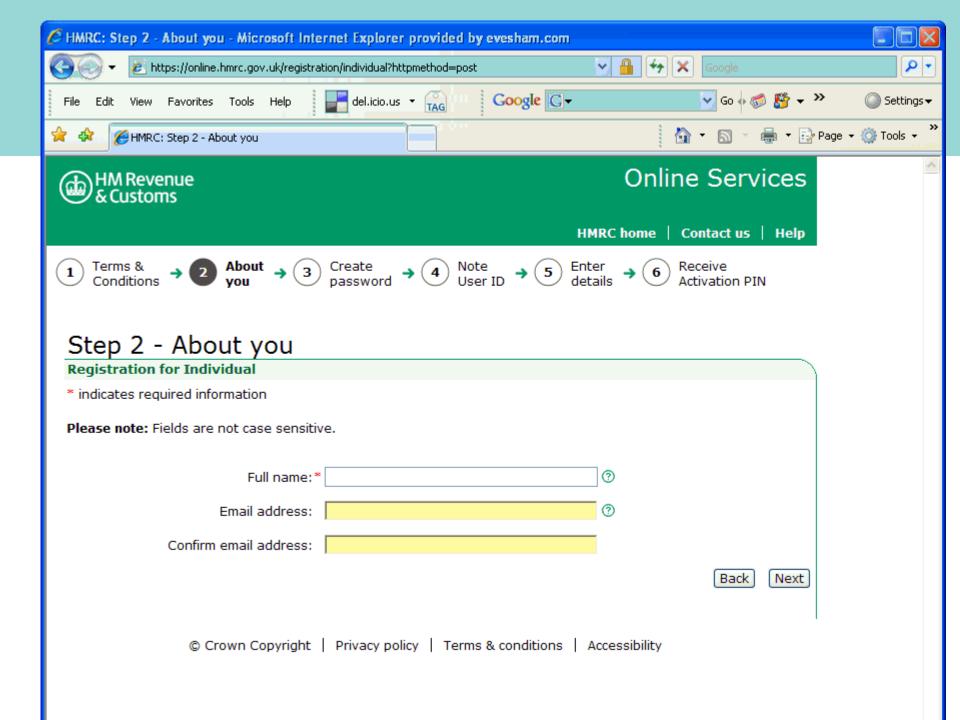
- The challenge:
 - Users have to gather their answers from a range of different sources
- The complications:
 - Users may not realise that they'll need all sorts of bits and pieces

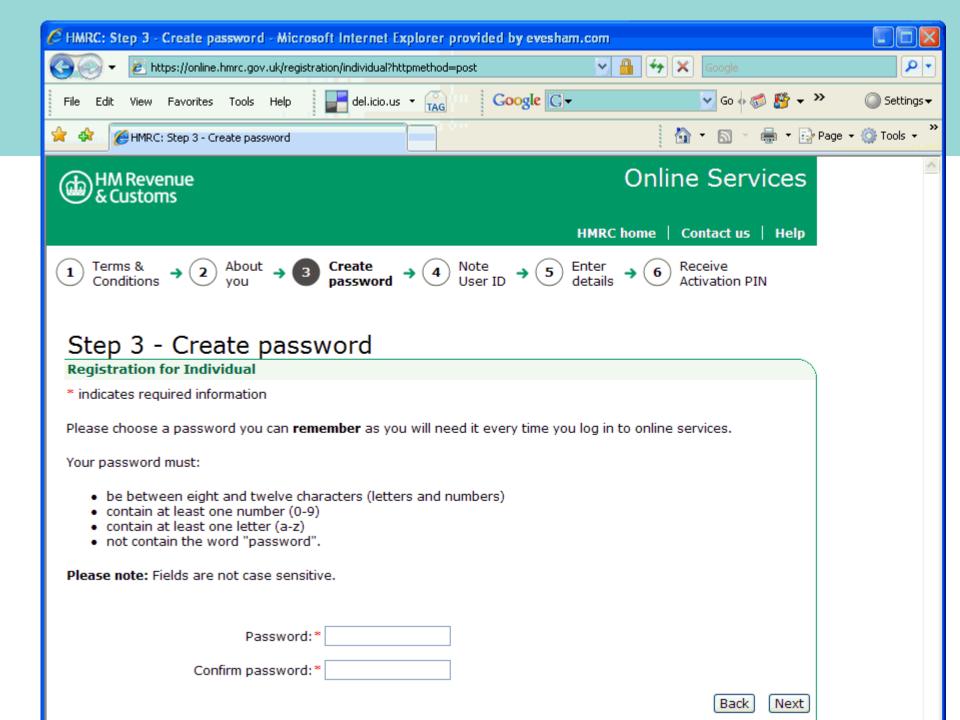
γ The idea

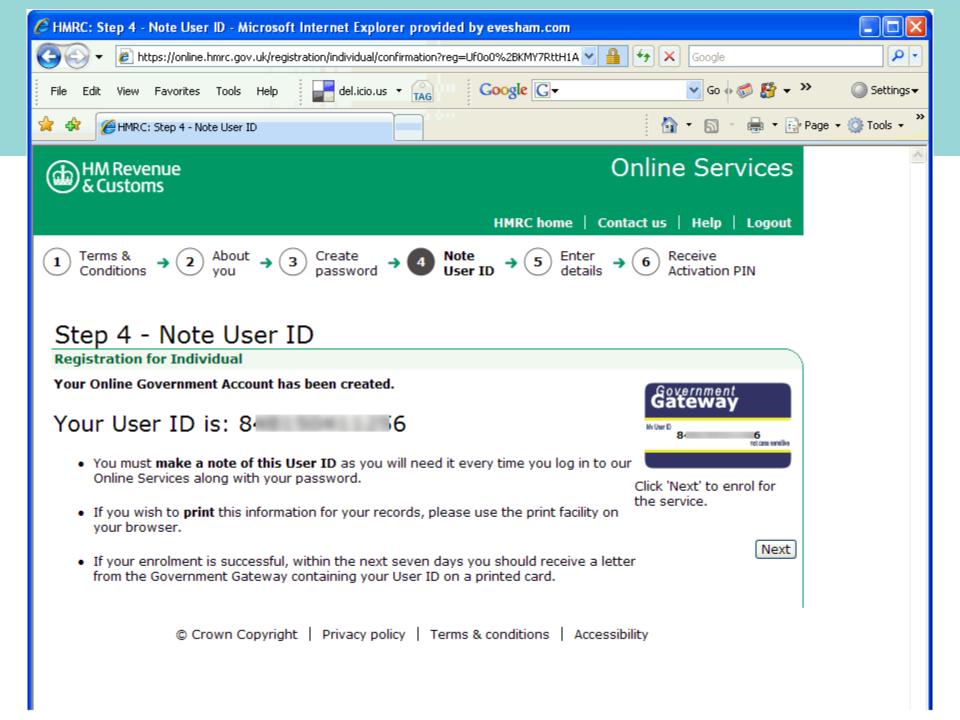
Provide a list of the items that the users will need







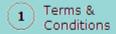






Online Services

HMRC home | Contact us | Help | Logout









Create password



Note User ID



Enter details

②

Receive Activation PIN

Step 5 - Enter Details

Enrol for Self Assessment

To enrol for Self Assessment, please enter the details below.

* Indicates required information.

Please note: Fields are not case sensitive.

Unique Taxpayer Reference (UTR):*

eg 1234567890

Activation Token:

eq A1B2C3D4E5F6

If you have entered an Activation Token, please now click 'Next', otherwise please enter at least one of the following three pieces of information:

National Insurance Number:

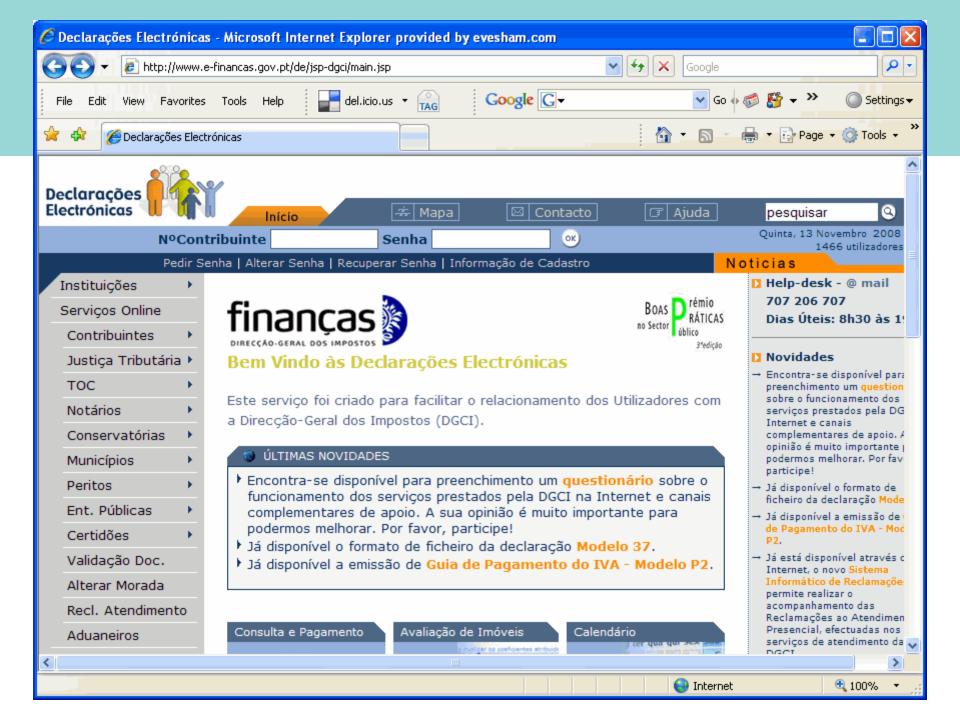


eg AB123456C

or

Postcode:

eq AB12 3YZ

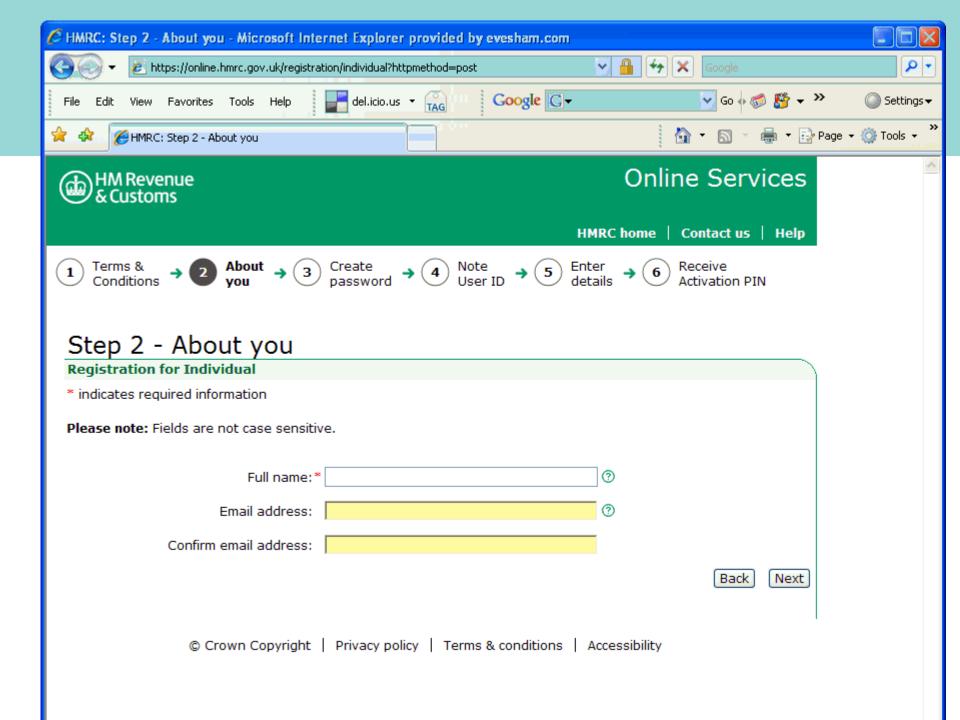


<u>jupow.</u>

links úteis

Conversation

Good forms show users how much work they have to do



Tip: Use a summary menu instead of a progress indicator

- The challenge:
 - It helps users if they can see how much they have done on the form, but the form doesn't 'progress' from screen to screen



 Use a summary menu so that users can choose which part of the form to do next

Example:

US government Central Contractor Registration form

The summary menu changes as you finish chunks of the form



Tip:

Work hard to have great save/resume features

The challenge:

 Users have to assemble data from several sources, so they are unlikely to fill in the form in one session.



- Ensure that they can save the form and get back to where they were without difficulty
- Have a retention policy
 - Decide how long you will retain partially-completed forms
 - Decide whether or not you will tell the user about this

Example:

 In a review of job application forms on 6 top-rated UK local government web sites, only one site had good save and resume features

Appearance

Good forms look attractive and easy to read

Tip: Avoid two-column forms

The challenge:

- You have a large number of fields and the form looks dauntingly long
- It's tempting to use two (or even more) columns to crush the fields into a smaller space

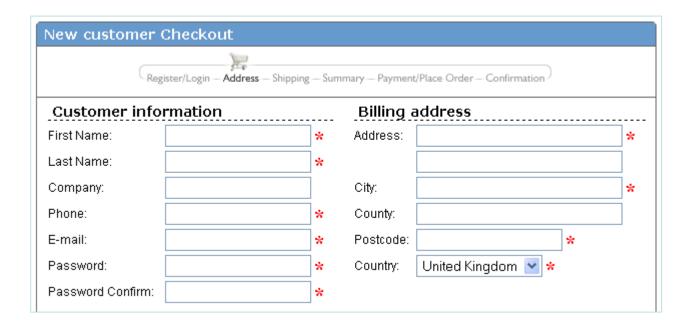
The idea

- If your users will use the form constantly as part of their everyday work, do contextual enquiry to find out whether a tightly-packed layout will be more or less efficient for them
- If your users encounter the form infrequently, avoid two-column forms

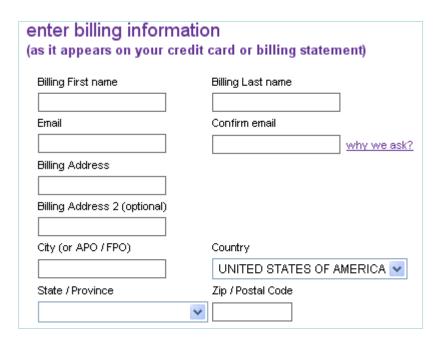
Examples:

Two-column forms are easy to mess up, giving a poor reading order

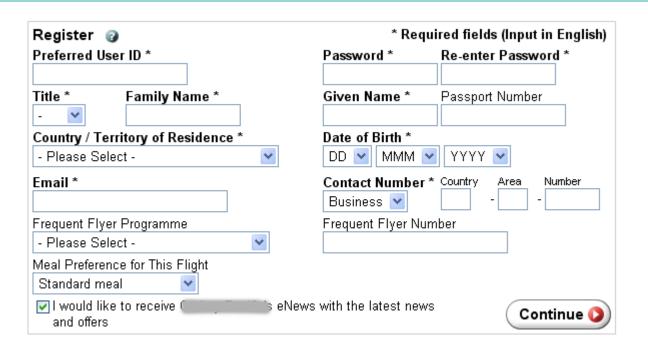
Two column form. What is the reading order?



Two column form. What is the reading order?



Two column form. What is the reading order?



Tip: Segment the form by topic; and if multiple users are involved, by user

The challenge:

You have a large number of fields and the form looks dauntingly long



The idea

- Cut the form into smaller sections. It will seem less difficult.
- Don't go crazy! You want chunks that are big enough to create topics.

Example:

not the most complicated, but a type of form many of us are familiar with:
 the event submission

Splitting everything up makes it look as if nothing goes together

REQUIRED! Month: January Month: Day: 1 Month: 2005 Month: Day: 1 Month: 2005 Month: Day: 1 Month: 2005						
Sub-title: Description of event, exactly as you want it to appear (1,000 characters max):	Date of Event: REQUIRED!	Month: Ja	anuary 💌	Day: 1 💌	Year:	2005 🕶
Description of event, exactly as you want it to appear (1,000 characters max):						
	Sub-title:					
	Description of e	vent, exactly	as you want it to appear			
	Moderator 1:	~				
Moderator 1:						
Moderator 1: Credit: (e.g. painter)	E-mail:					
Credit: (e.g. painter)						

Stripping out some of the lines creates better chunks (and makes the form look shorter)

Date of Event: REQUIRED!	Month: Ja	anuary V Day: 1	Y ear: 2005 ∨		
Title of event: REQUIRED! Sub-title:					
Description of e	vent, exactly	as you want it to appea	r (1,000 characters max)):	^
Role	Title	First Name	Middle Name or Initial	Last Name	Pseudonym
Moderator 1: Credit: (e.g. painter) E-mail:					
Role	Title	First Name	Middle Name or	Last Name	Pseudonym

Question time

Question: What is your advice about label placement on forms?

Caroline:

I gave a workshop at UX LX in May 2010 about that.

You can find the slides at:

http://slideshare.net/cjforms

The most recent research is in my October 2010 column for Uxmatters:

http://www.uxmatters.com/mt/archives/2010/10/label-placement-in-austrian-forms-with-some-lessons-for-english-forms.php

or

http://bit.ly/cXPcuV

Question: What is your advice about putting hints inside text boxes?

Caroline:

Anyone who reads these added notes at the end of this presentation just won't believe that the two questions asked were really about two topics in my recent Uxmatters columns. But they were, truly.

My advice is: don't put hints into text boxes. Users interpret them as default values. Put the hint near to, but outside, the box.

http://www.uxmatters.com/mt/archives/2010/03/dont-put-hints-inside-text-boxes-in-web-forms.php

or

http://bit.ly/dzcnpl

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