# Design tips for complex forms Malta 2012

**Caroline Jarrett** 



This form looks appealing, the questions are simple, the task is easy



# But what happens if we have to work with complex forms like this?



## Apply to be authorised as a financial adviser



Doing business with us 🔻 FSA Library 🔻 FSA Handbook

The FSA Register

Consumer information

Search Cymraeq

Google™ Custom Search

In this section:

Doing business with us How do I get authorised

Retail intermediaries

#### Retail intermediaries application

If you are applying for authorisation, then you must:

- prepare and collect the supporting documents;
- · build your application pack;
- · fill in the forms in the application pack;
- · sign the forms and return them to us by post with your cheque and the required supporting documents.

#### The supporting documents you must have

Click on the links for further information about each document:

- staff organisational chart;
- business plan information; (not applicable to Connected Travel Insurance firms)
- compliance procedures;
- details of your professional advisers;
- an opening balance sheet;
- a forecast closing balance sheet after 12 months trading or first years trading;
- · a monthly profit and loss account for the first years of trading;
- · a monthly cashflow forecast;
- · a copy of the latest annual accounts (if previously traded); and
- a Professional Indemnity Insurance quotation.



#### Contact

If you have any problems, please contact the Firm Contact Centre

Email:

Firm Contact Centre

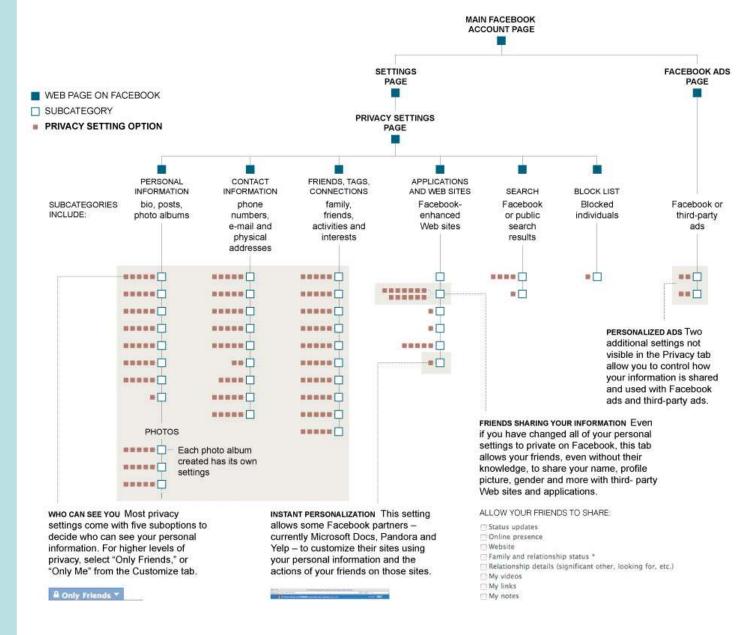
Telephone:

0845 606 9966

(call rates may vary)



## Privacy on Facebook



## A form is complex if ...

- It has more than one page
- Answers come from elsewhere:
  - Form
  - Document
  - Page
  - Person
- The consequences are important:
  - Money
  - Stress
  - Prison?



## Three women do their tax



Anna



Maria



Lisa

7

# Which of these statements is most important for Maria?



That form was easy because...

- I liked the way it looked and it was easy to read
- 2. I understood the questions and could answer them
- 3. I knew exactly what I had to do and I got my tax done on time

## Users experience a form in three layers

**Appearance** 

Can't read it

Conversation

Can't answer

Relationship

Can't achieve my goal

## A good form works well across all three layers

**Appearance** 

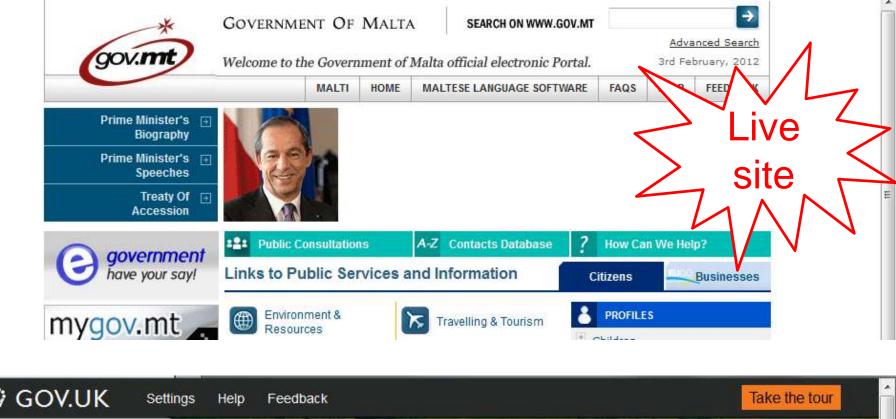
Lovely and legible

Conversation

Easy questions, obvious answers

Relationship

Goals achieved (mine and yours)

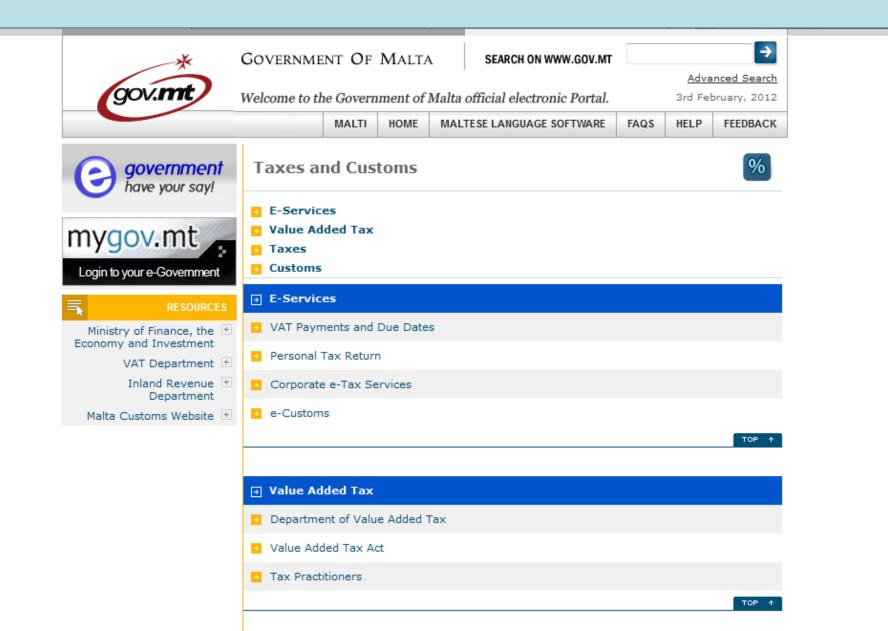




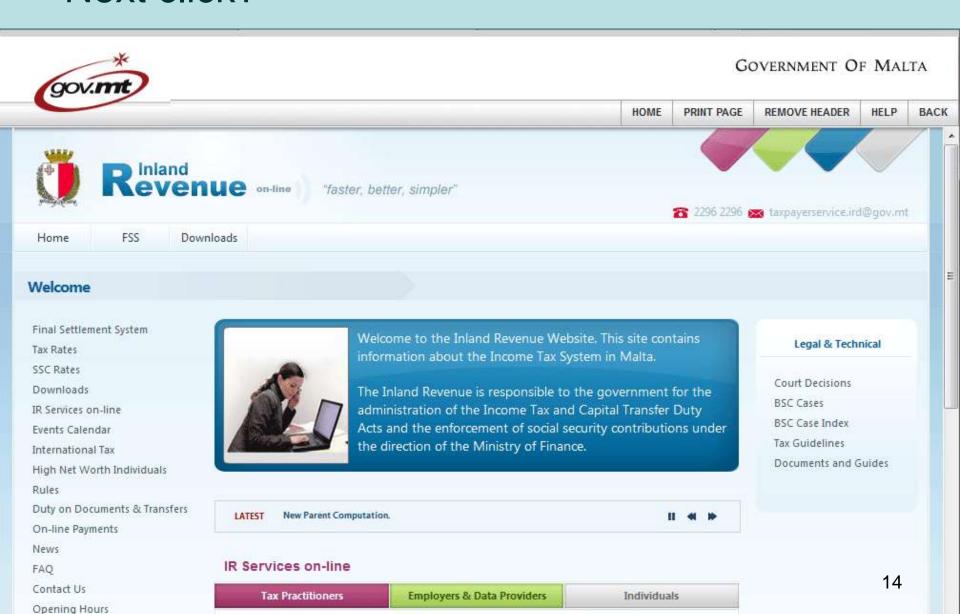
## Task: find the right form



## Let's see what's visible on a typical laptop



### Next click?

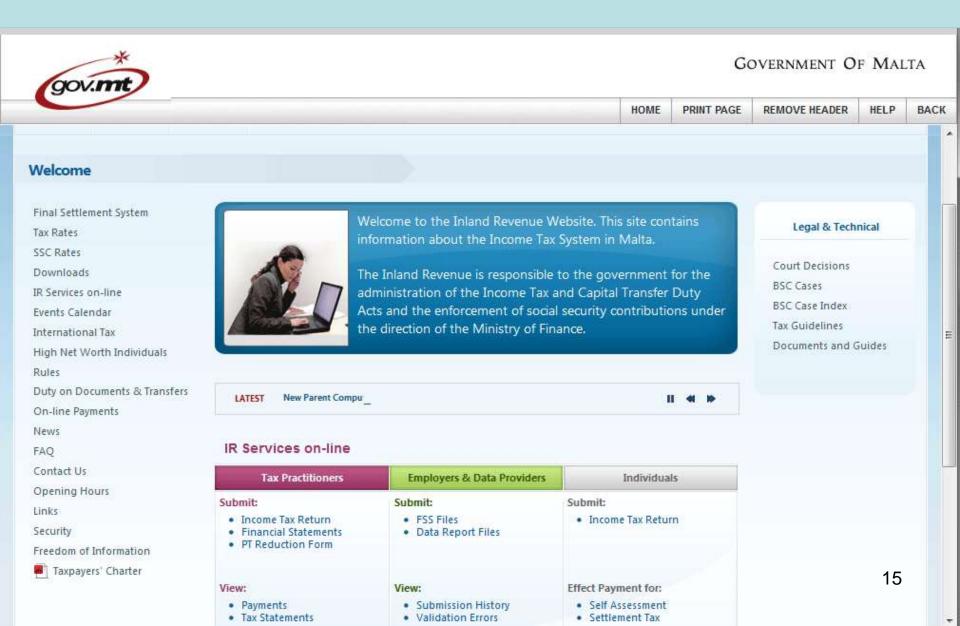


Submit:

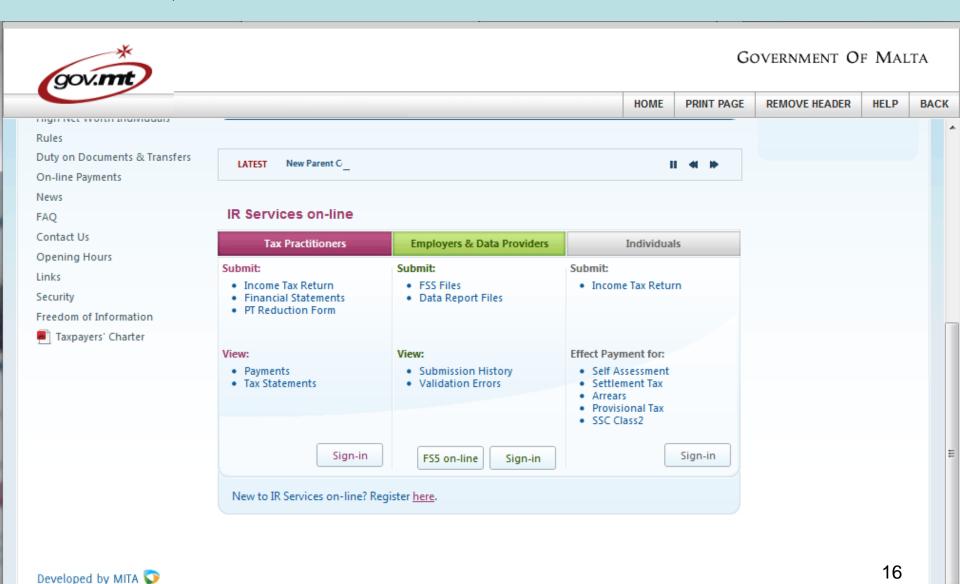
Submit:

Submit:

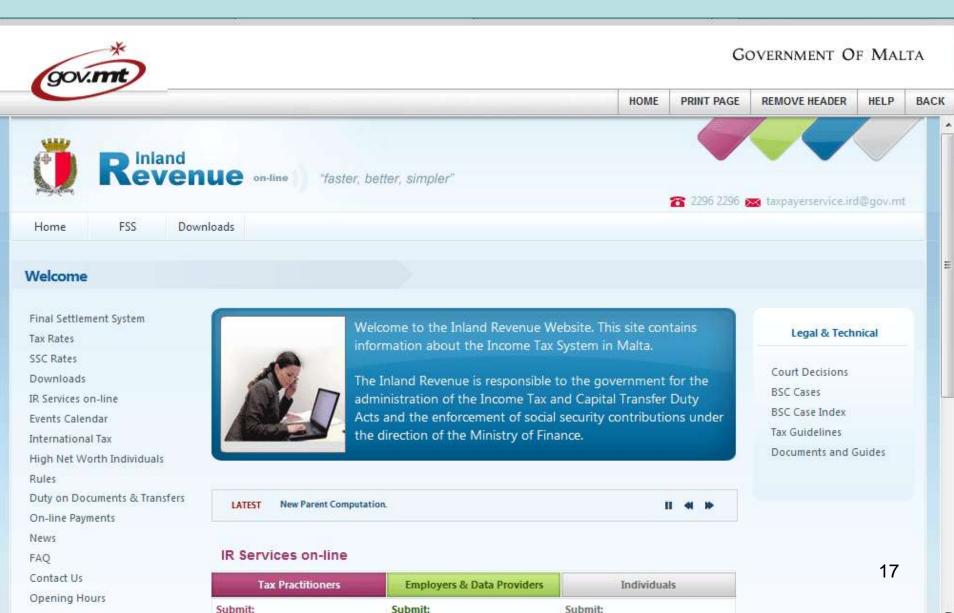
## That 'Income Tax Return' link... isn't a link



## Ah ha, there it is



## A quick suggestion?



## A quick suggestion?



"faster, better, simpler"



GOVERNMENT OF MALTA

HOME

PRINT PAGE

REMOVE HEADER

HELP

BACK

Final Settlement System

Tax Rates

SSC Rates

Downloads

IR Services on-line

Events Calendar

International Tax

High Net Worth Individuals

Rules

Duty on Documents & Transfer

On-line Payments

News

FAO

Contact Us

Opening Hours

Links

Security

Freedom of Information

Taxpayers' Charter



Welcome to the Inland Revenue Website. This site contains information about the Income Tax System in Malta.

The Inland Revenue is responsible to the government for the administration of the Income Tax and Capital Transfer Duty Acts and the enforcement of social security contributions under the direction of the Ministry of Finance.

LATEST

New Parent Compu

#### IR Services on-line

Tax Practitioners	Employers & Data Providers	Individuals	
Submit:  Income Tax Return Financial Statements PT Reduction Form	Submit:  • FSS Files • Data Report Files	Submit:  • Income Tax Return	
Payments     Tax Statements	Submission History     Validation Errors	Self Assessment Settlement Tax Arrears Provisional Tax SSC Class2	
Sign-in	FS5 on-line Sign-in	Sign-in	

Legal & Technical

Court Decisions

BSC Cases

BSC Case Index

Tax Guidelines

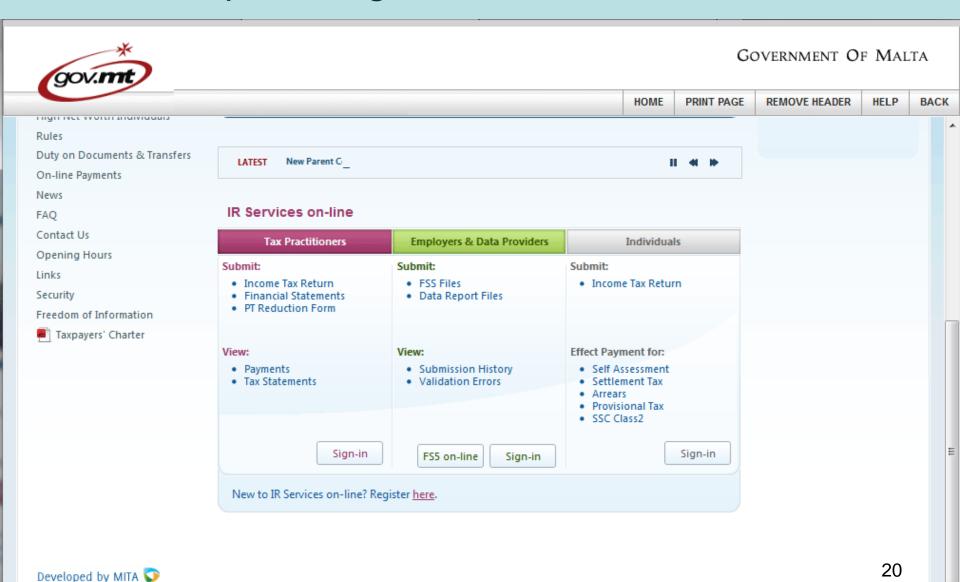
Documents and Guides

# Form tip 1 (about relationship)

Focus on what your users need to do



## Let's keep clicking







Friday February 03, 2012

#### Welcome to IR Services on-Line

The Inland Revenue is providing individual taxpayers with the facility to submit their Income Tax Return over the Internet, Taxpayers can apply for their e-ID and submit their Income Tax Return for the current year of assessment. Taxpayers may also view their Tax Statements, Income Tax Return Status and Income Tax Payments from this website.

This is the logon interface to the Inland Revenue On-Line services for individual taxpayers. The services included will allow you to access your own personal information relating to tax matters on a year-by-year basis.

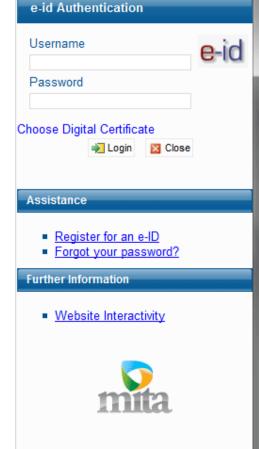
This system is for the sole use of authorised individuals holding a valid e-ID issued by the Maltese Government. All activities are monitored and recorded.

To log in, please enter your e-ID login and password. If you require assistance in logging kindly use the links provided on the right.

A step-by-step user guide is available for download from here (Powerpoint slide-show\*, 5Mb)

\* Requires Powerpoint Viewer 2003.





## What do you need to do first?

### mygov.mt



#### Accessing and Using mygov.mt

Friday, February 3, 2012 | Malti Home | FAQs | Ask a Question





- Step 1 Registering and Using your e-ID
- Step 2 Receiving your e-ID Details
- Step 3 Activating your e-ID
- Step 4 Registering for a Digital Certificate (Optional)
- Step 5 Installing your Digital Certificate (Only once you complete Step 5)

#### Registering and Using your e-ID

You must have an e-ID to use e-Government Services. The e-ID, or electronic identity, is a trusted authentication mechanism for citizens and businesses to identify themselves to electronically access services from across government.

To register for your e-ID, follow the guidelines below:

STEP 1 - Visit one of the e-ID Registration Offices in Valletta or in Rabat (Gozo)

#### VALLETTA (Evans Building, Merchants Street, Valletta Malta - same location as Passport Office)

Monday to Friday : 8 a.m. to 2 p.m.

Wednesday : 8 a.m. to 2 p.m. and

3 p.m. to 6 p.m.

Saturday : 8 a.m. to 11 a.m.

#### RABAT, GOZO (St. Francis Square, Rabat, Gozo - same location as Passport Office)

Monday to Friday: 7.45 a.m. to 11.30 a.m. and

1.30 p.m. to 4.00 p.m.

(the office is only open in afternoons between 1st September and 15th June)

Saturday : 7.30 a.m. to 11 a.m.

You must present your ID Card and give your email address to the Registration Officer. If you don't have an email account, the Registration Officer will advise you how to get an email account for free.

#### STEP 2 - Receiving your e-ID Details

After corroborating your identity, the Registration Authority will send you a username, password, and a secure PIN activation code that are unique

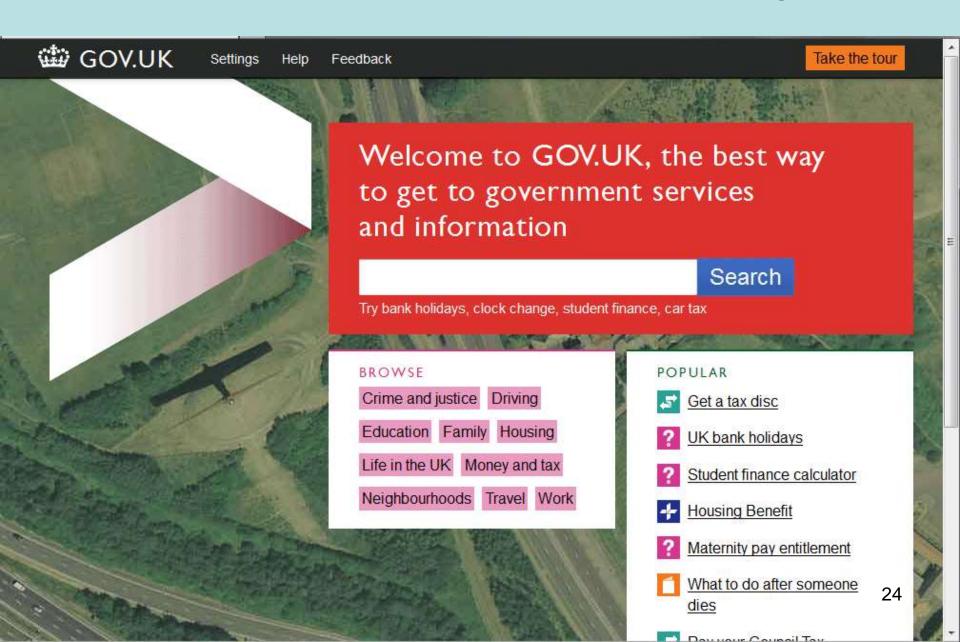
## Form tip 2

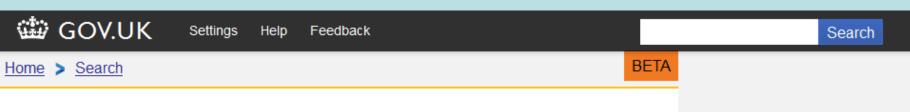
(about relationship)

## Put the first thing first



## Let's try that in the UK: 'beta' version of gov.uk





#### Search results for tax return

tax return Search

47 results found

#### File your Self Assessment tax return

You can file your Self Assessment **tax return** online by registering for HM Revenue & Customs online ...

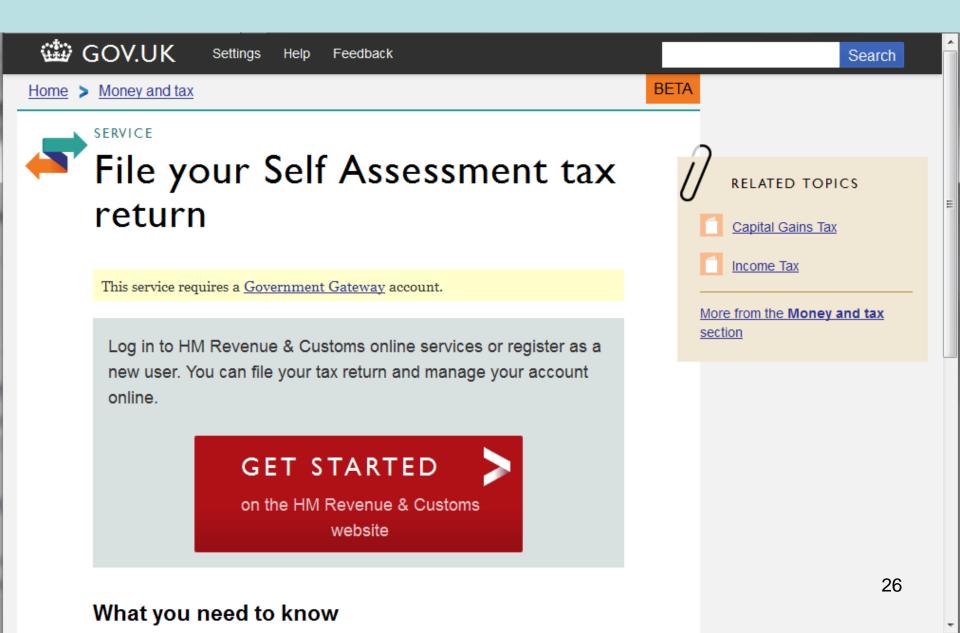
## Get your tax right if you retire abroad or return to the UK

How to make sure you pay the right **tax** if you retire abroad or **return** to the UK after living abroad ...

## 50-plus element of Working Tax Credit

If you are 50 or over and **returning** to work after being on certain

## Click or scroll?



## I'm a new user



#### Online Services

HMRC home | Contact us | Help

#### Welcome to HMRC Online services

#### **Existing users**

Please enter your User ID and password, then click the 'Login' button below.

Please note: Fields are not case sensitive.

User ID:

Password:

Login

- Digital Certificate user
- Lost User ID?
- Lost password?
- Lost or expired Activation PIN?
- If you have lost both your User ID and password please contact the HM Revenue & Customs (HMRC) Online Services Helpdesk.

#### New user

To register for online services please click the Register button below.

#### Register

- Digital Certificate user
- ▶ Frequently Asked Questions (FAQs)
- Computer requirements
- View a demo of HMRC's services
- ▶ Registration and Enrolment process

#### News

#### Are your contact details up to date?

It's really important that your contact details are kept up to date so that HMRC can confirm your submission receipt by email and you can obtain new passwords online.

#### Are you having problems logging in?

If you've entered the wrong User ID or password three times or more, your account will be locked and you won't be able to use HMRC Online Services for the next two hours.

#### Online Security

## Um, um, um... not so sure here



#### Online Services

HMRC home

Cymraeg | Contact us | Help

#### New user

Please select the type of account you want to create, Individual, Organisation, Pensions or Agent.

#### Individual

Please register as an 'Individual' if you are using HM Revenue & Customs Online Services for personal transactions or if you are self-employed.

#### Organisation

Please register as an 'Organisation' if you are using HMRC's Online Services as an employer, a contractor, a Partnership, a Limited Company or Trust.

#### Agent

Please register as an 'Agent' if you are using HMRC's Online Services on behalf of your client(s), whether paid or acting in a voluntary capacity.

#### Pensions

Please register for 'Pensions' if you are using HMRC's Online Services as a Pension Scheme Administrator or a Pension Scheme Practitioner.

Back

## Um, um, um... where is 'tax return'?



#### Online Services

HMRC home | Cymraeg | Contact us | Help

#### New user

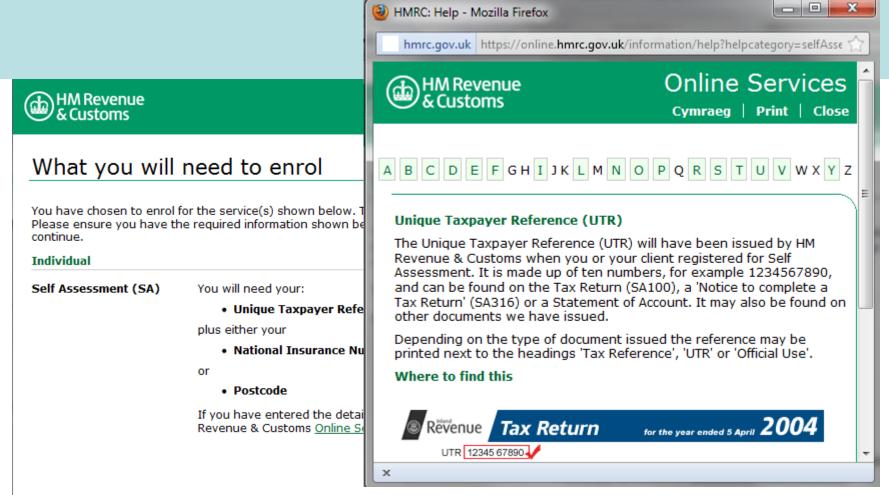
Please <b>select the services</b> you wish to use.	`
Individual	
Self Assessment (SA)	
Site content tools	
VAT (submit return or change details)	
VAT EC Sales List (ECSL)	
VAT EU Refunds	
VAT Registration	
VAT Reverse Charge Sales List (RCSL)	
Other services	
If you are not an Individual wishing to register, please choose one of the options below.	
<ul> <li>▶ Organisation</li> <li>▶ Pensions</li> <li>▶ Agent</li> </ul>	
	Dod. Nort

## Form tip 3

(about conversation)

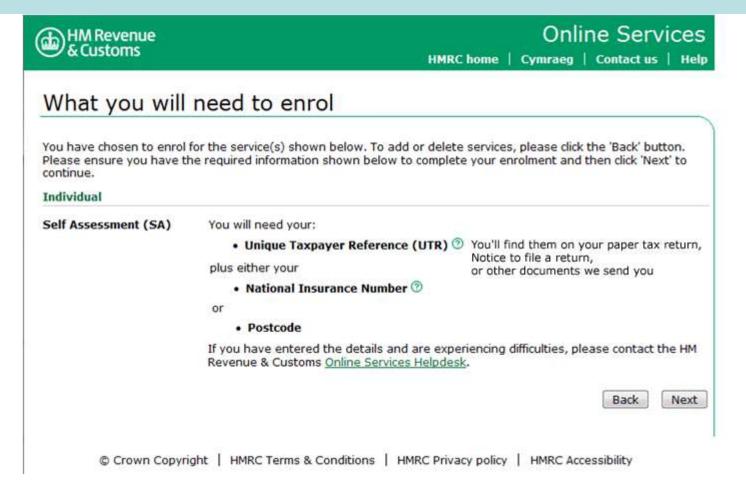
# Use the same words all the way through





© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

# Suggestion: put the help on the same page



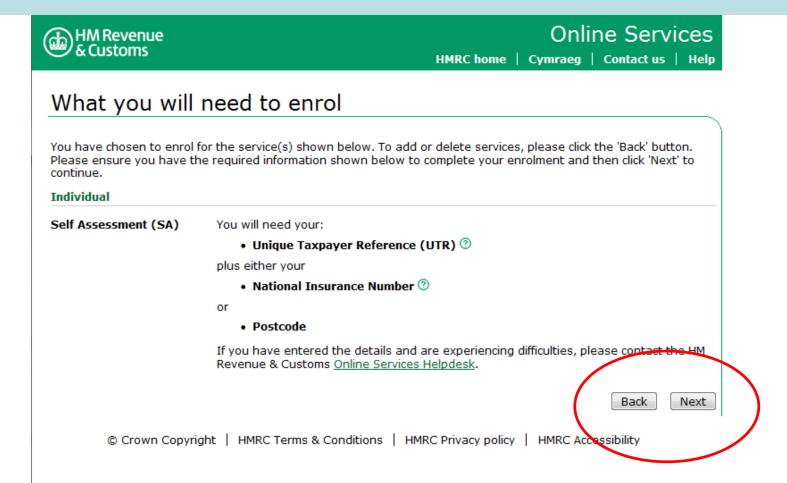
Form tip 4

(about conversation)

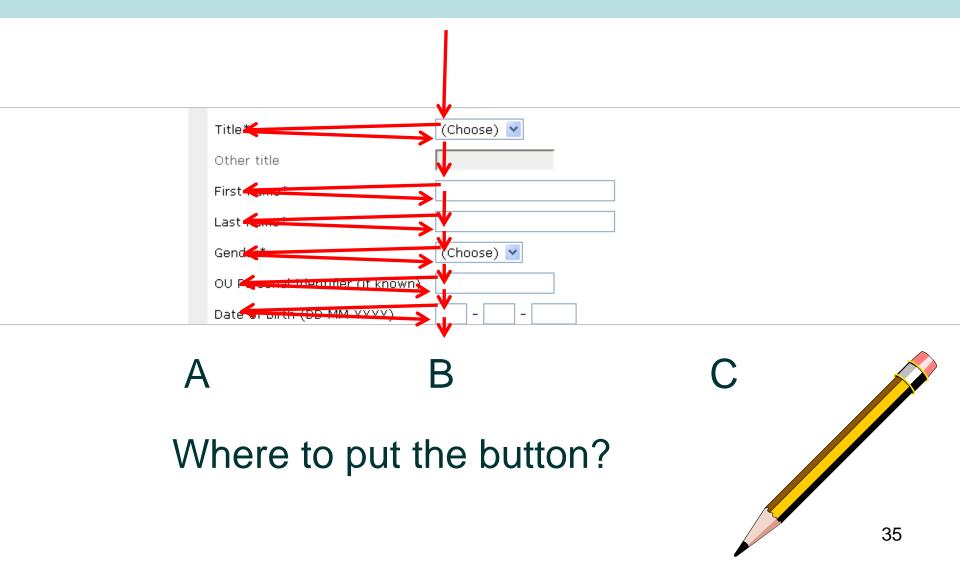
Put just enough help where the user needs it



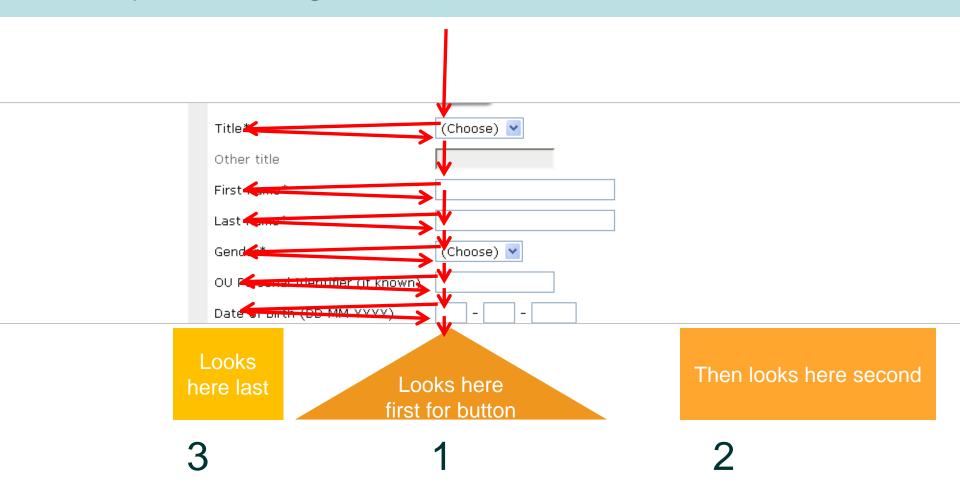
## A quick look at buttons.



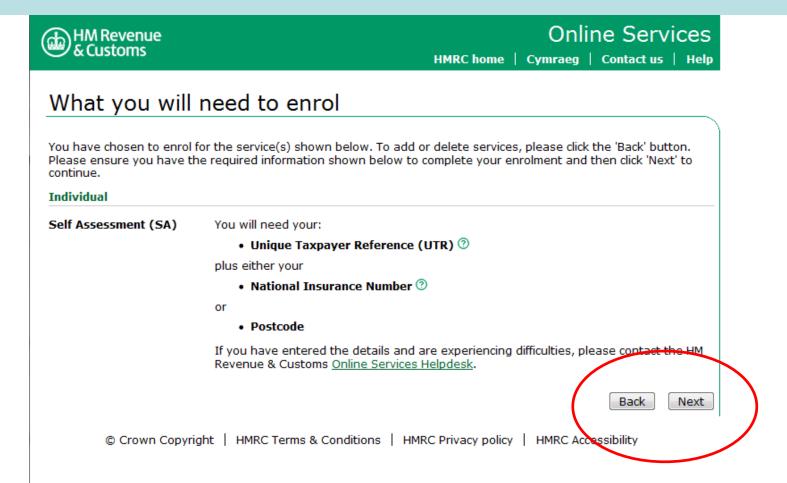
## Typical eye-movement when reading a form: Look for field, turn left for label, look for field



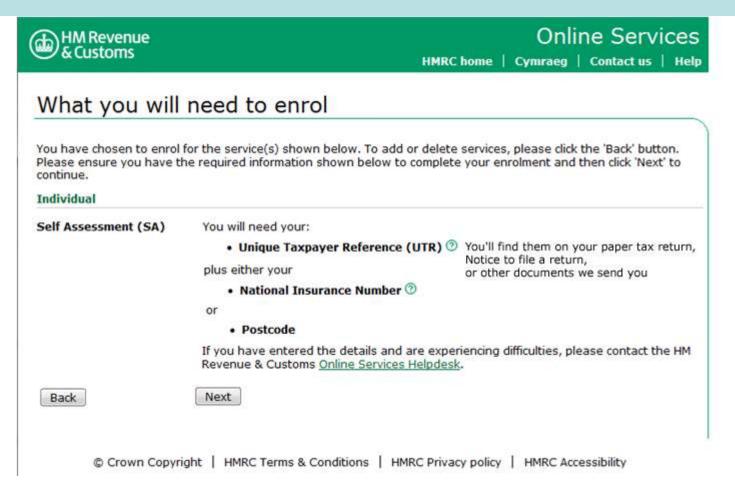
## In eye-tracking studies, I observed this



## A quick look at buttons.



## A second suggstion



# Appearance Tip

Best place for a button: aligned with left-hand end of text entry boxes

Next

## Complexity affects all three layers of the form

## Relationship

- Focus on what your users need to do
- Put the first thing first

#### Conversation

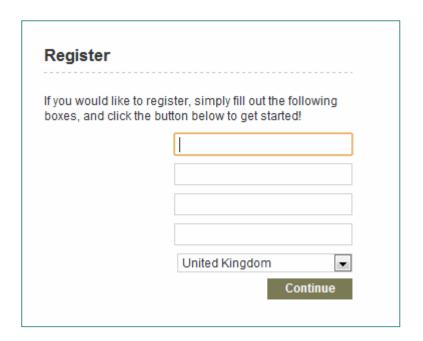
- Use the same words all the way through
- Put just enough help where the user needs it

## Appearance

 Put clearly labelled buttons in the right place



## Recently I had to fill in this form



And I succeeded, because the task was important

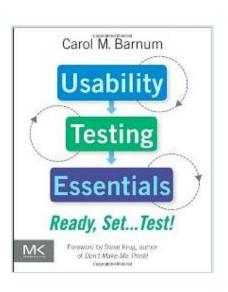
# More resources on http://www.slideshare.net/cjforms

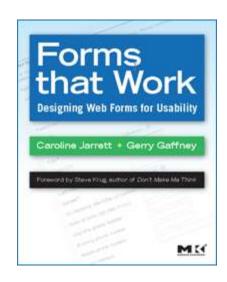
Design tips
for complex forms
2011
Caroline Jarrett
J.Boye Conference Denmark

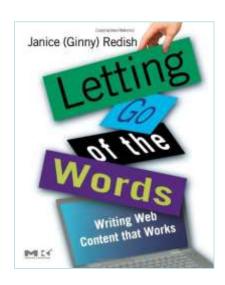




## Thanks to Morgan Kaufmann for these books







## Virtual seminar "Design tips for surveys"

- 28<sup>th</sup> February 2012
- 1:30pm Eastern time = 7:30pm Malta time
- 2<sup>nd</sup> in 'Next Steps' series from
   User Interface Engineering and
   Rosenfeld Media

## **Caroline Jarrett**

twitter @cjforms caroline.jarrett@effortmark.co.uk

