

Forms workshop

ConCon Manchester 2016

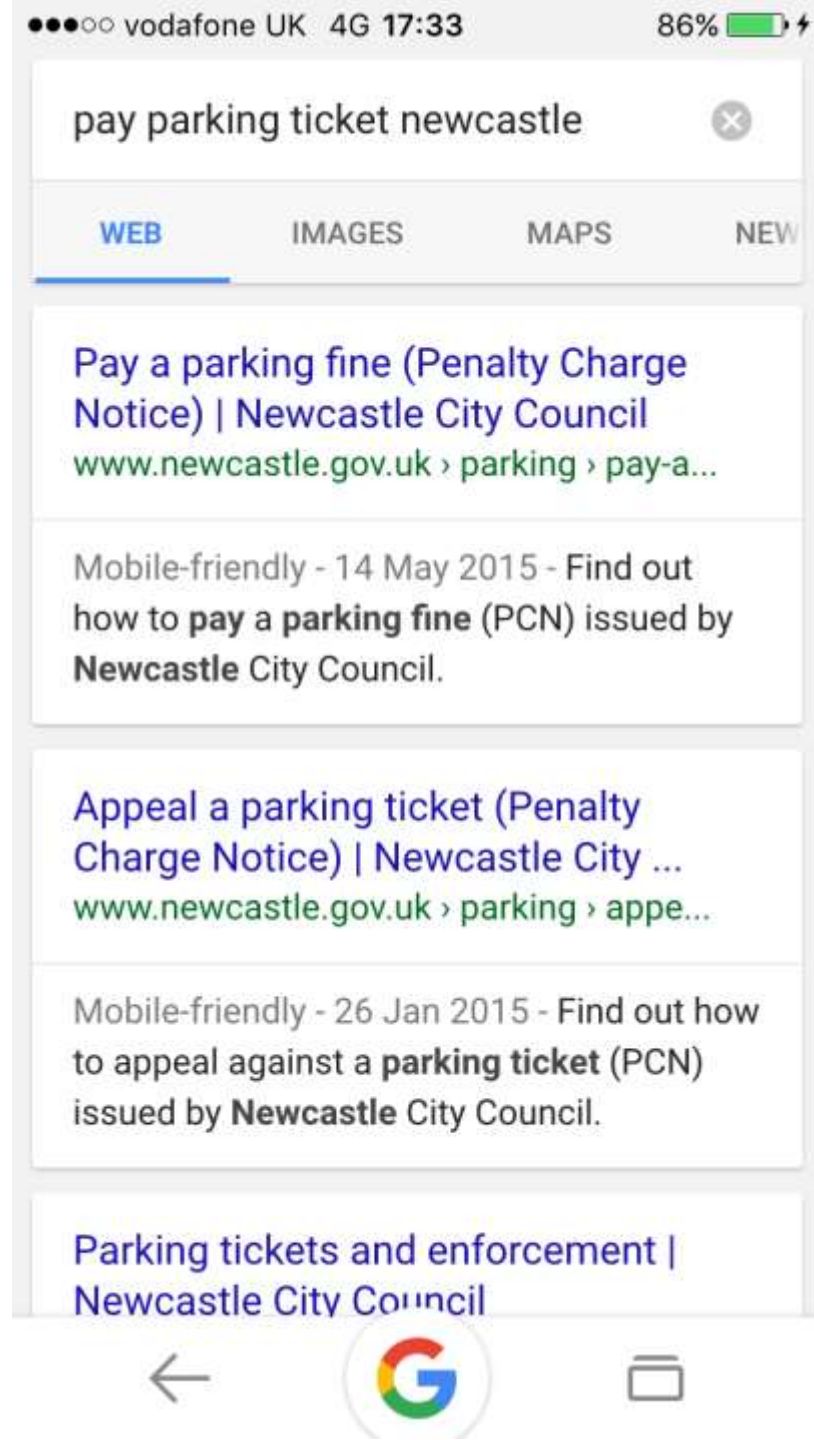
Caroline Jarrett @cjforms

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
the form start?

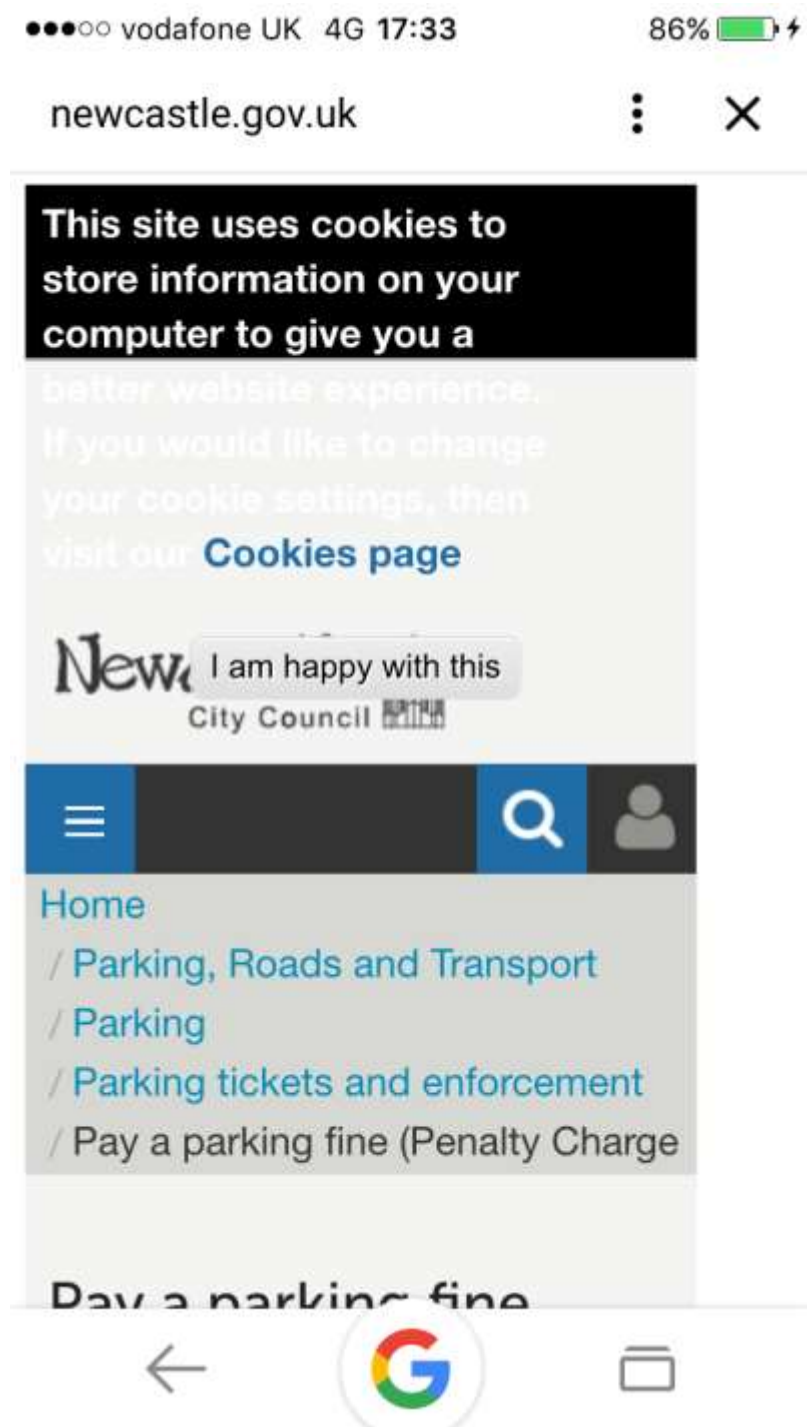
I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
the form start?



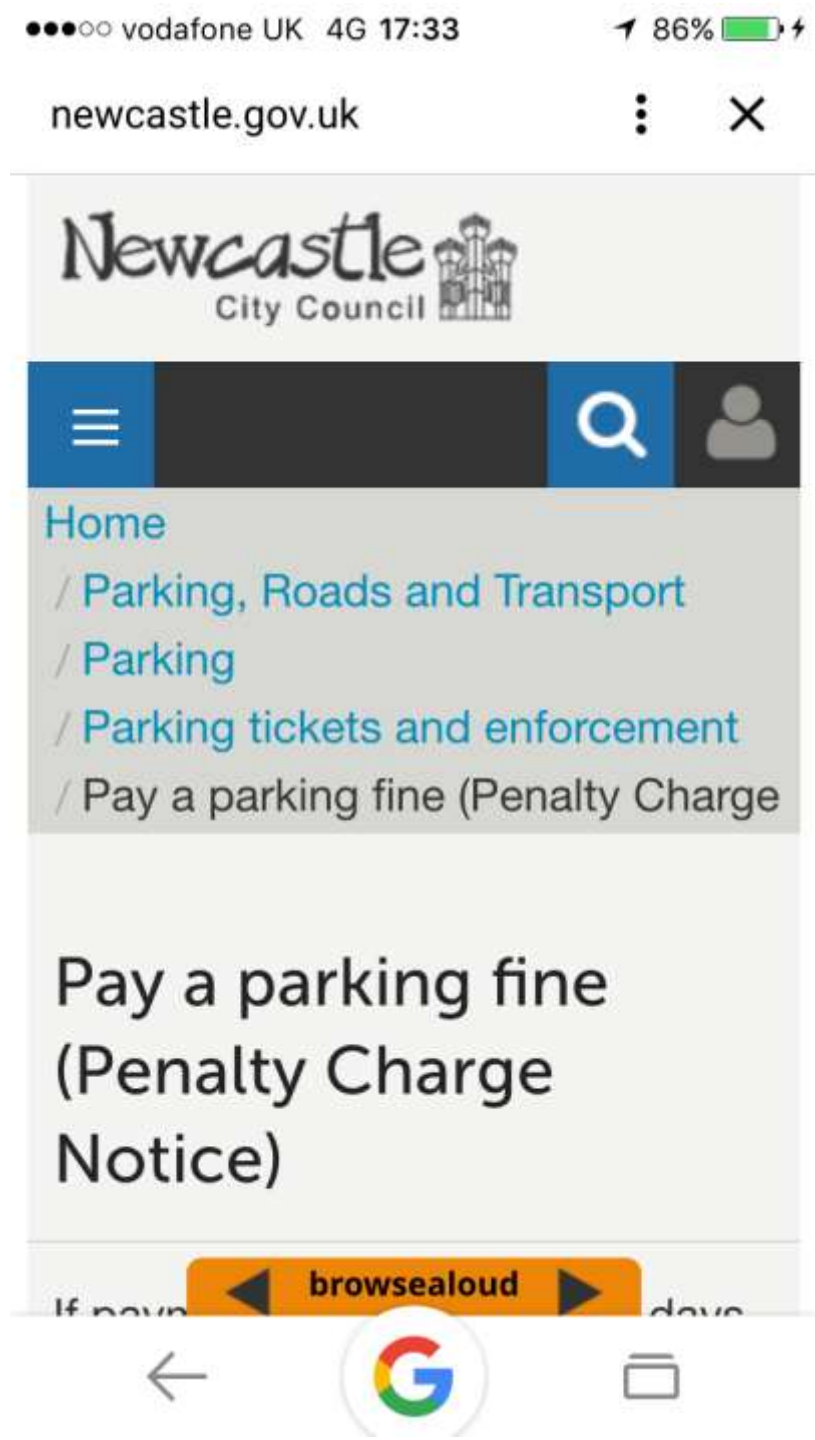
I need to pay
a parking ticket
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Where does
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I need to pay
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I've lost the ticket.

Where does
the form start?

Pay a parking fine (Penalty Charge Notice)

If payment is made within 14 days of the date that the PCN was served a discount of 50% of the penalty charge is applicable (that is £25.00 or £35.00 would be due).

Where a PCN has been issued following enforcement by the ANPR car (that are PCNs beginning with NU90) the 50% discount is available for 21 days after the joint PCN/Notice to Owner is served.

Pay online

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
the form start?

The screenshot shows a mobile browser interface. At the top, the status bar displays 'vodafone UK', signal strength, time '17:34', and battery '86%'. The address bar shows 'parking.newcastle.gov.uk'. The page header features the 'Newcastle City Council' logo and a navigation menu icon. The main content area is titled 'PCN Details' and contains a paragraph explaining the site's purpose for paying Penalty Charge Notices (PCNs) and submitting appeals. Below this, a section titled 'PCN details' contains a form with two input fields: 'Vehicle Registration Number' and 'Penalty Charge'.

PCN Details

You can use this site to pay for a Penalty Charge Notice (PCN), to submit an appeal or to view information about the contravention. Details regarding a PCN will usually appear 1 working day after the PCN was issued or 3 days in exceptional circumstances.

PCN details

Vehicle Registration Number

Penalty Charge

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Oh dear.

●○○○ Vodafone UK 18:28 100%

parking.newcastle.gov.uk

Newcastle City Council

[PCN Search](#) > PCN Details

PCN Details

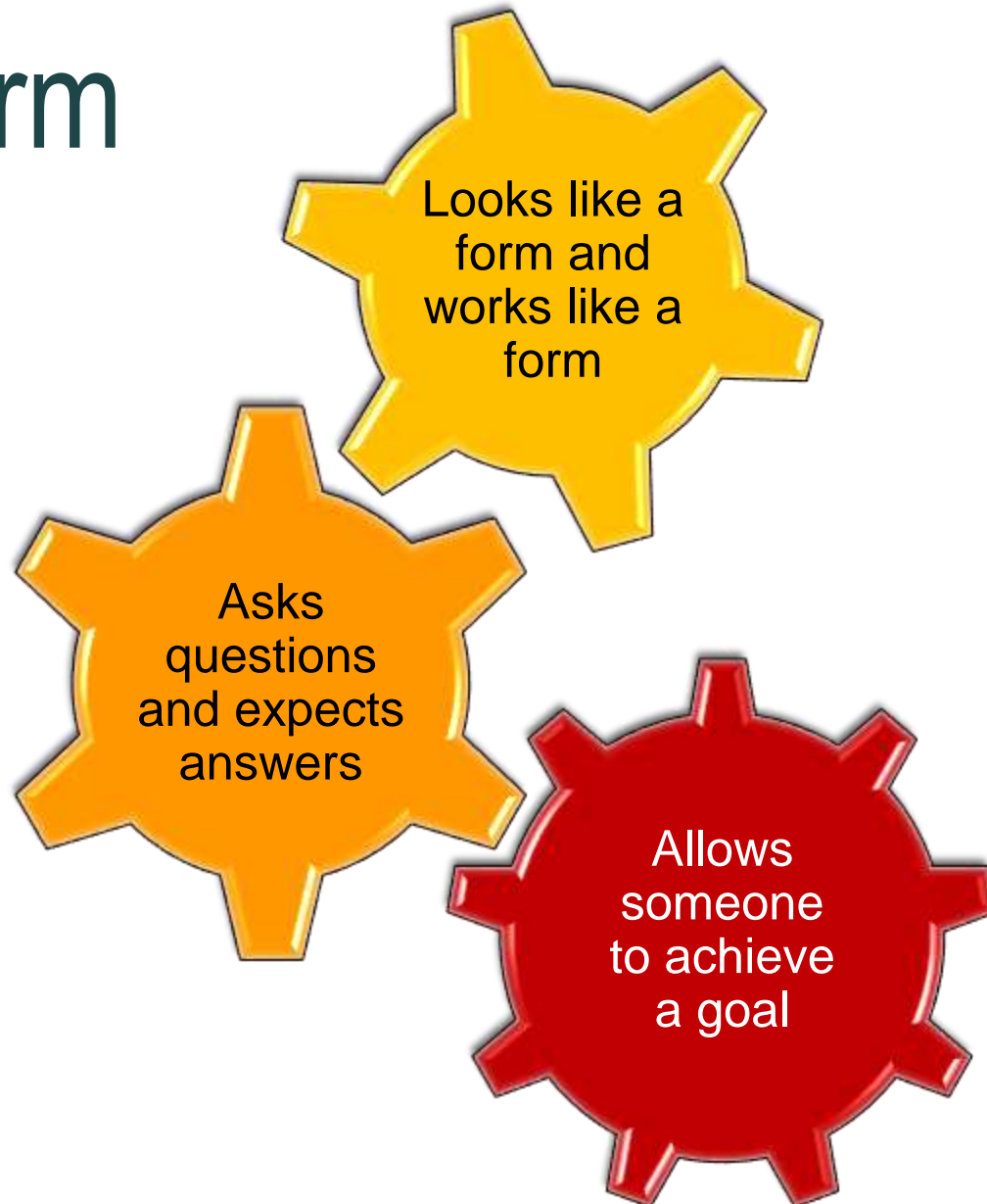
You must type Penalty Charge Notice

PCN Details

Vehicle Registration Number

Penalty Charge Notice

It's a form if it ...



Interaction
Design

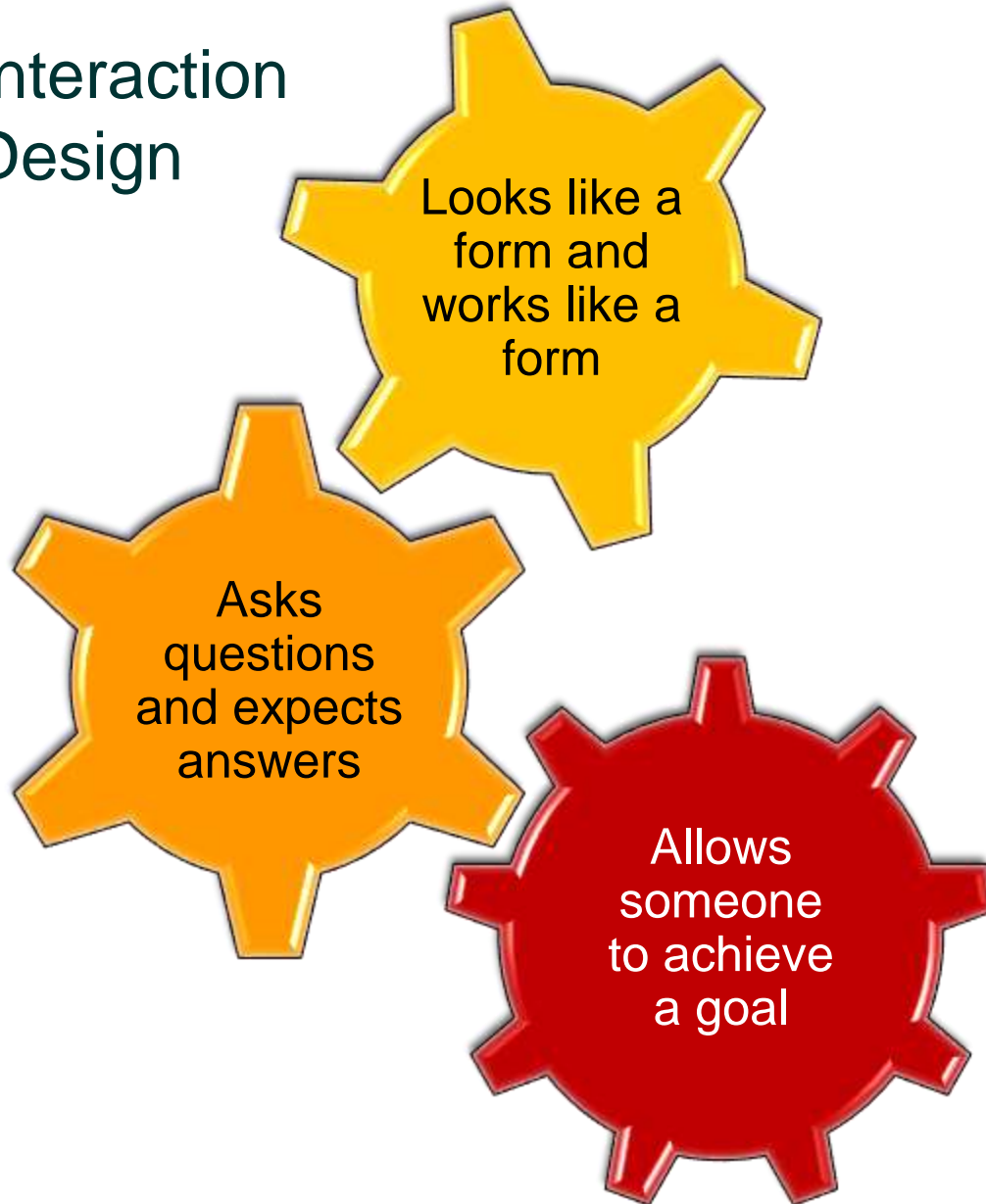
Looks like a
form and
works like a
form

Content
Design

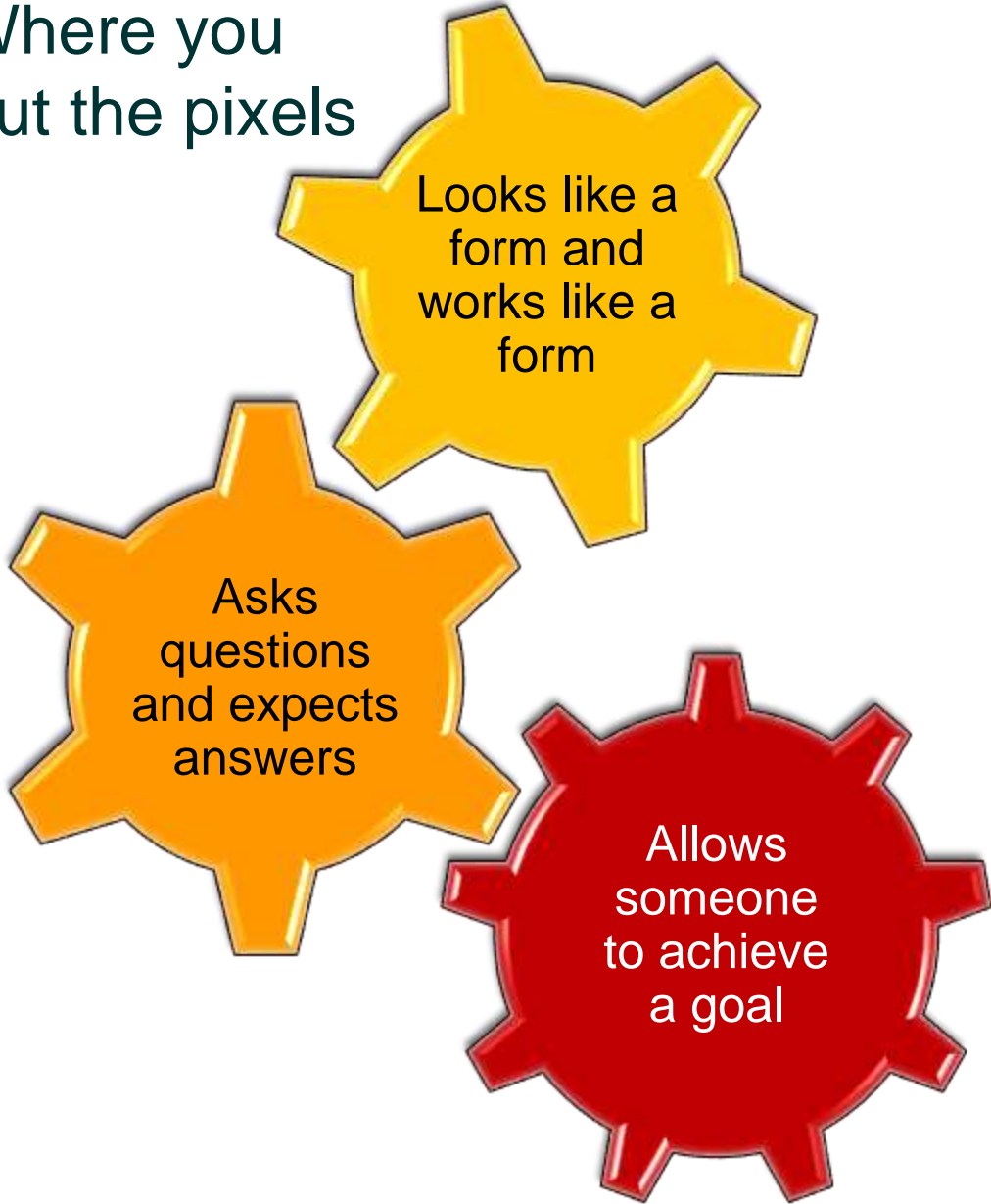
Asks
questions
and expects
answers

Allows
someone
to achieve
a goal

Service
Design



Where you
put the pixels



Looks like a
form and
works like a
form

The questions
you ask

Asks
questions
and expects
answers

The answers
you need

Allows
someone
to achieve
a goal

Users'
needs

(and business ones)

A great form works well across all three layers

Appearance

Lovely and legible.
Simple interaction

Conversation

Easy to understand
and answer

Relationship

Goals achieved



How to look at a form

Step 1

Don't look at it

yet

Step 2

Choose a persona

Write the story of why that
persona is filling in the form

write down
your assumptions

“I’ve always loved the sea”



Step 3

Fill in the form
as that persona,
as honestly as you can

keep notes

[Home](#) > [Births, deaths, marriages and care](#) > [Death and bereavement](#)

Licence

Get a licence for a burial at sea in England

Apply for this licence

Start now >

on the Marine Management
Organisation service

Overview

You can apply for a marine licence to bury someone at sea:

- off The Needles, Isle of Wight
- between Hastings and Newhaven
- off Tynemouth, North Tyneside

You can also propose a new site when you make your application. You'll need to supply coordinates and evidence to demonstrate that the site is suitable for burials at sea.

You'll be responsible for ensuring the coffin is built to the [correct specifications](#).

The Marine Management Organisation (MMO) has the right to inspect the

Step 4

Now look at it

How did it work across
the three layers?

Appearance
Conversation
Relationship

Step 5

Do user research

Appearance:	How do users interact in practice?
Conversation:	What words do users actually use?
Relationship:	What are the real users like?
	What are their needs?

How to look at a form

1. Don't look at it.
2. Choose a persona and write the story of why that persona is filling in this form.
3. Fill in the form as that persona, as honestly as you can.
4. Now look at it.
How did it work across the three layers?
5. Do user research
Investigate your assumptions

Bonus: how to review anything

1. Don't look at it.
2. Choose a persona and write the story of why that persona is **using this thing**.
3. Try using the thing as that persona, as honestly as you can.
4. Now look at it.
How did it work across the three layers?
5. Do user research
Investigate your assumptions

Tips for user research on forms

Observe people as they use the forms



Tip

Track a sample of forms through your process

Look for: minimum time, maximum time, mode, errors, loops, customer contacts, staff involvement.
But most of all: for errors.



In some ways,
paper is easier for discovery



Tip

Try a 'replay study'

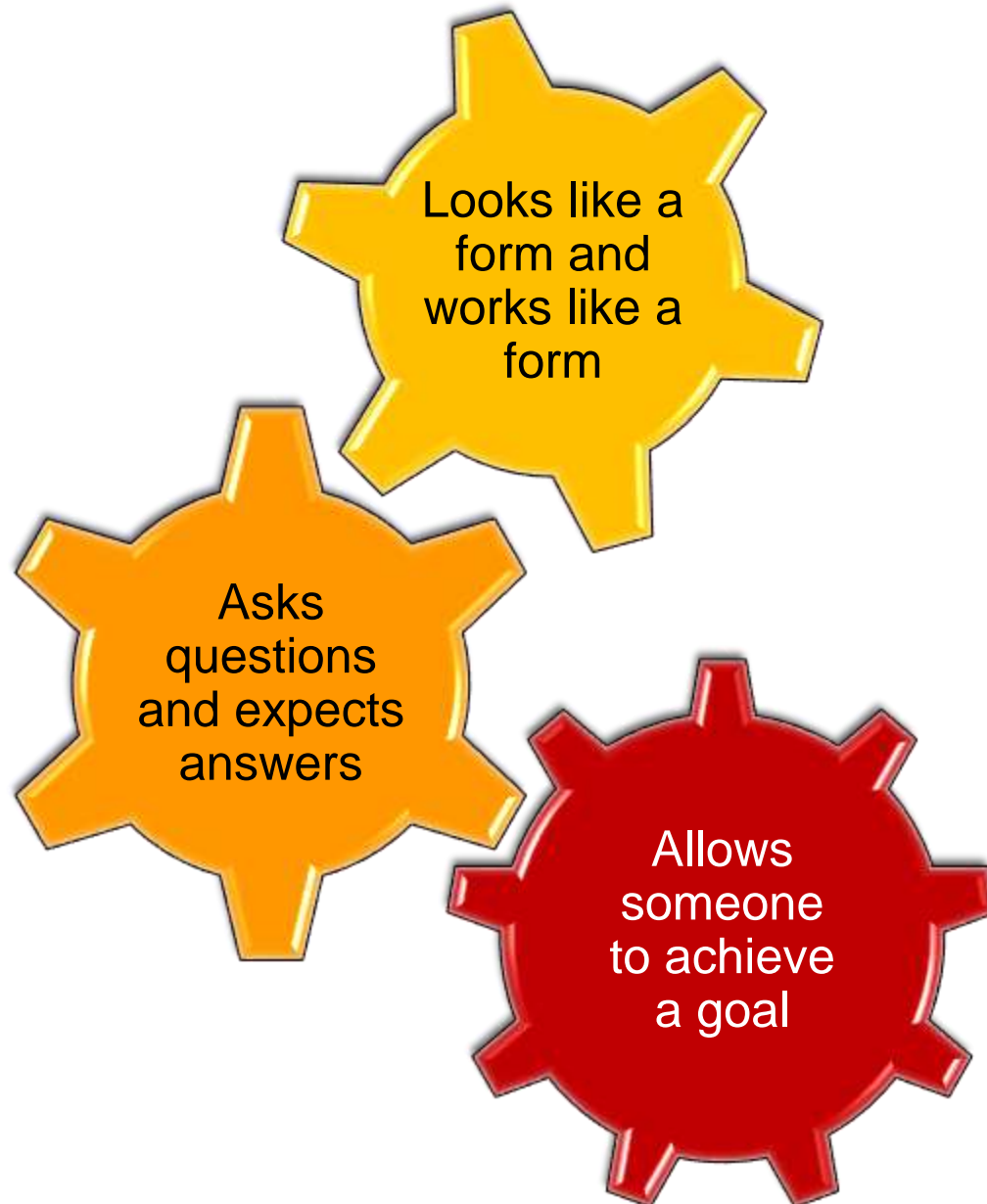
Users have another go at a complex form:

- In their own environment
- With their real data
- While you watch and take notes.



How to write for a form

How to write for a service



The answers
you need

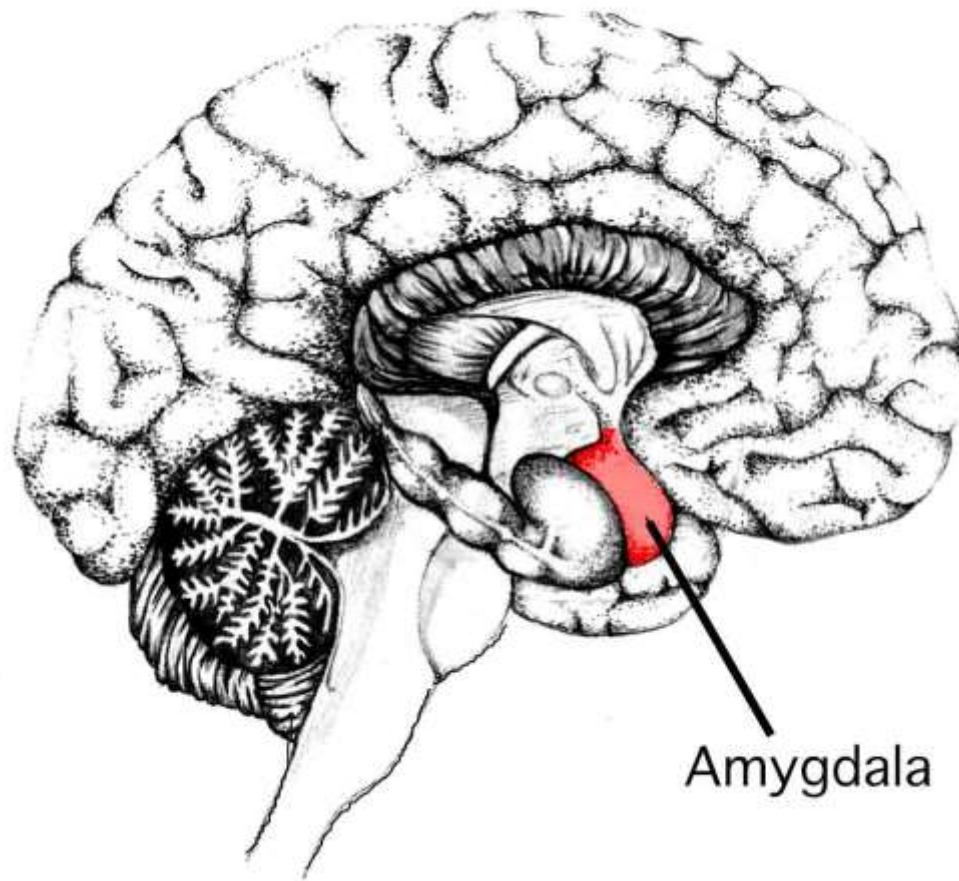
Form structure

How to structure web forms for GOV.UK services.

1. [Know why you're asking every question](#)
2. [Design for the most common scenarios first](#)
3. [Start with one thing per page](#)

<https://www.gov.uk/service-manual/user-centred-design/resources/patterns/form-structure.html>

When we're stressed, the amygdala grabs as much resource as possible. So, cognitive deficit.



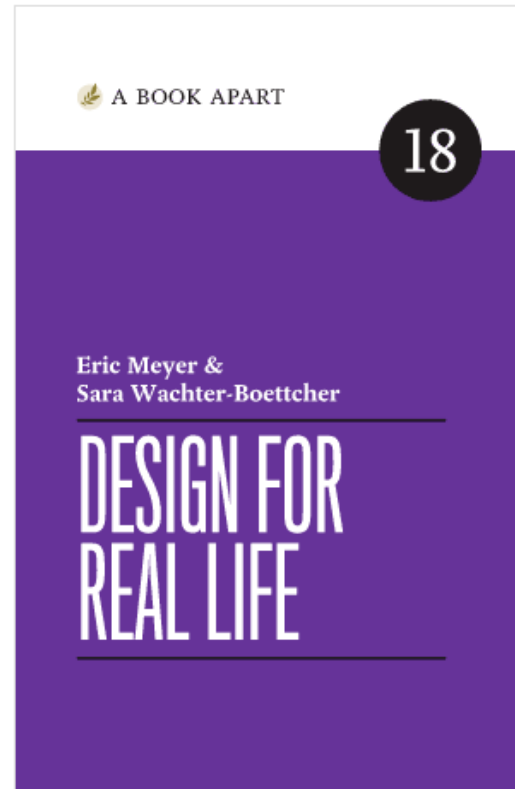
Many “easy” questions can trigger stress

Every time a website asks: “Male or Female?” and offers no opt-out, no “It’s complicated,” I pause. I have to think about what I want to answer and why. Do I check “female” to match the name I still give and the socialization I received? Or do I check “male” and risk someone noticing the discrepancy, because this reflects myself?

From “Design for Real Life”

Eric Meyer and Sara Wachter-Boettcher

<https://abookapart.com/products/design-for-real-life>



What's the most common circumstance?

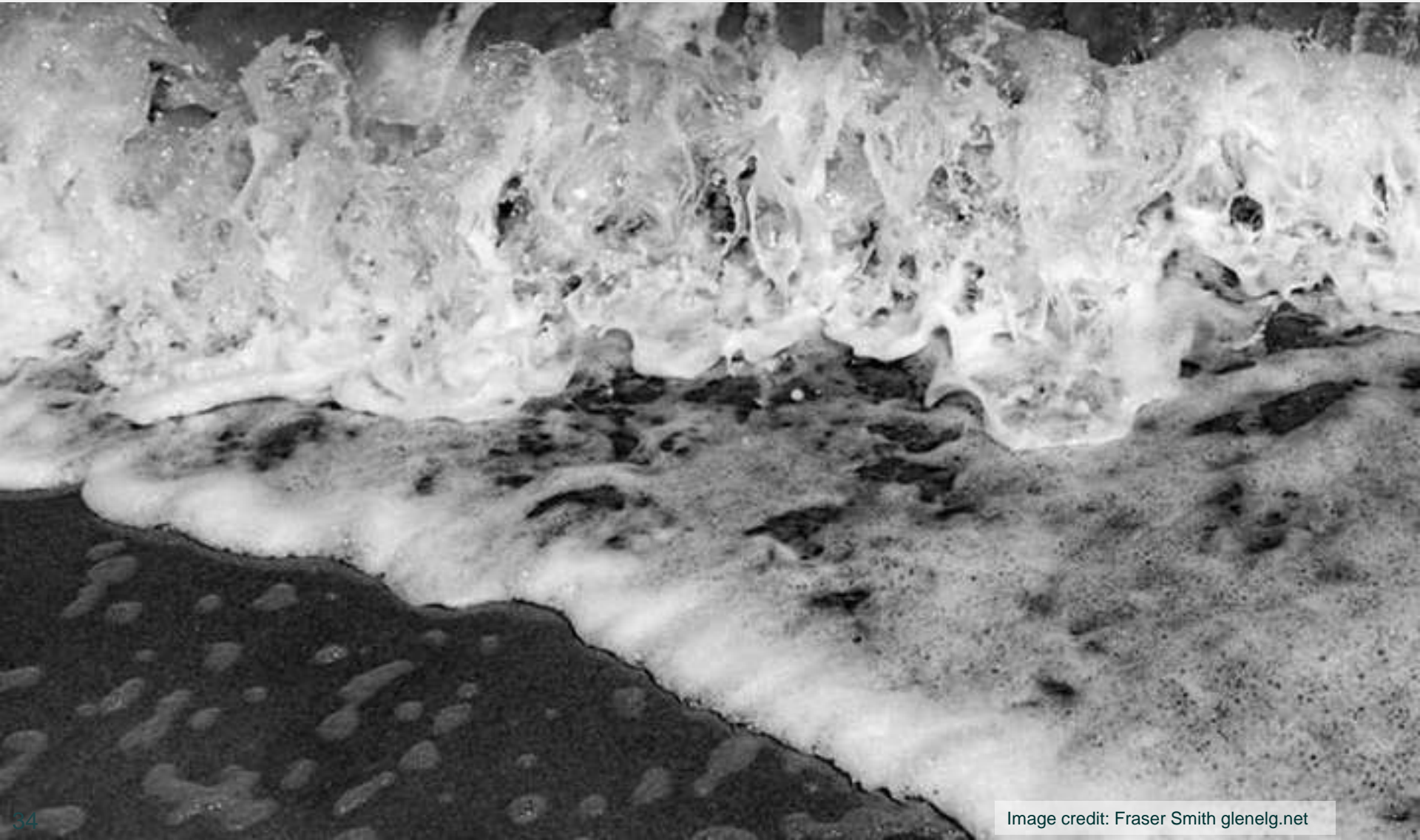
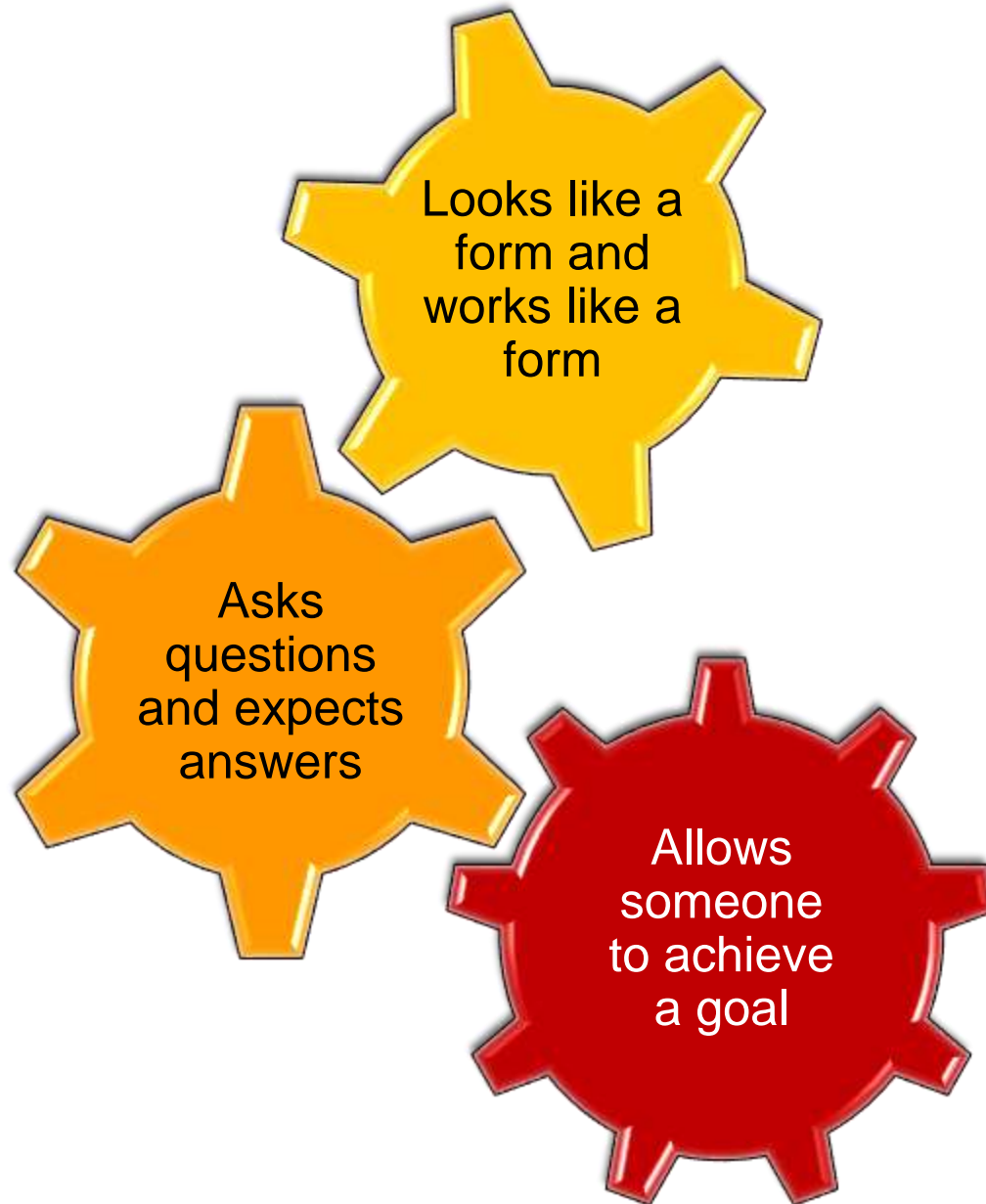


Image credit: Fraser Smith glenelg.net

The questions you ask



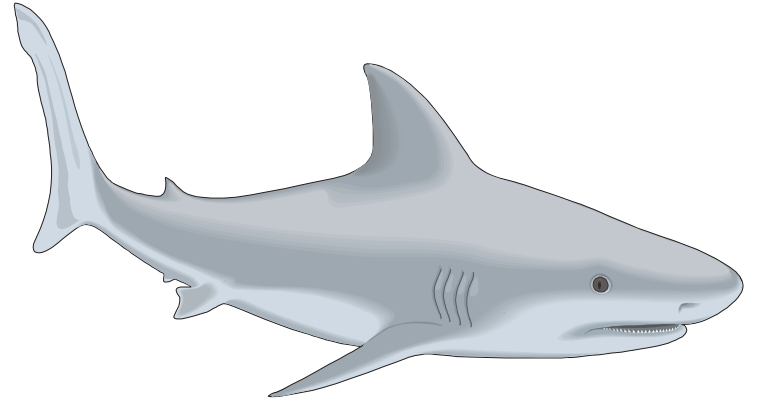
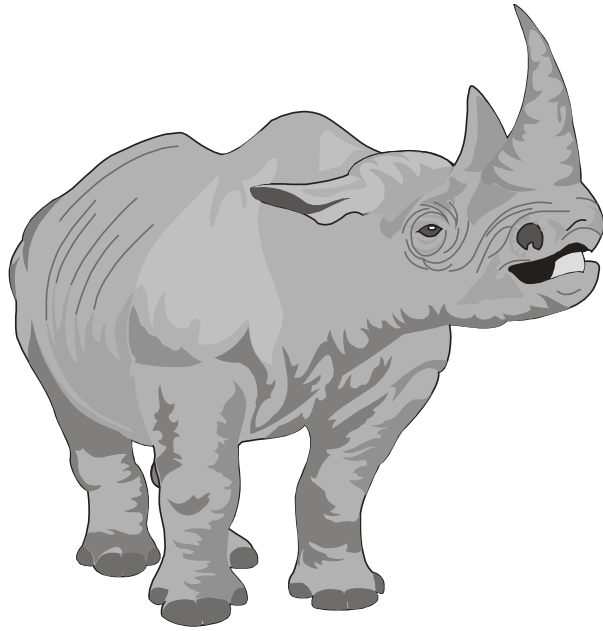
Questions with 'yes' and 'no' answers can be tricky

Do you or your partner get Child Benefit?

☐ Yes

☐ No

If you're a dolphin,
are you more like a rhino or a shark?



There are (usually) more answers in the world than in the official process

2. Did you find what you were looking for today? *

☐ Yes, I found what I needed.

☐ No, I was not able to find what I needed.

Why ask for a telephone number?

Telephone Number



Organisation Name (Employer)

Date Of Birth



Security Question



Security Answer

Why ask for a telephone number?

Telephone Number



Organisation Name (Er

Date Of Birth

Security Question

Security Answer

Customary input formats:

- FOR United Kingdom:

FORMAT: STD NUMBER

U.Kingdom: 020 12345678

- FOR International:

FORMAT: +CC (NDD)STD NUMBER

Netherlands: +31 (0)20 12345678

Hungary: +36 (06)1 12345678

U.Kingdom: +44 (0)20 12345678

- FOR International without NDD:

FORMAT: +CC STD NUMBER

Norway: +47 123 4568900

Spain: +34 911 12345678

America: +1 123 4568900

“You must enter this item”

Telephone Number

+44 (0)1525 370 379



Organisation Name (Employer)

You must enter this item

Date Of Birth

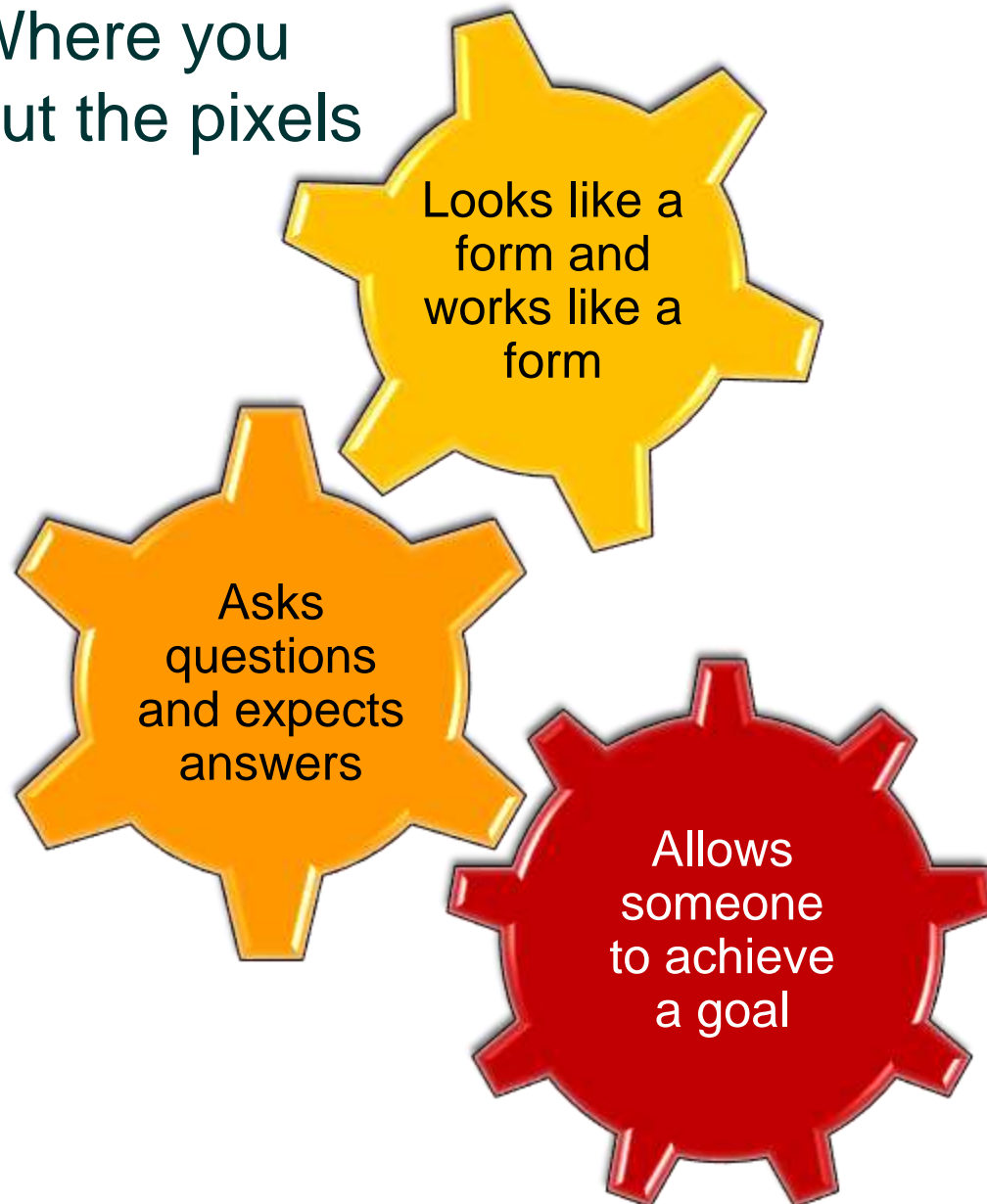


You must enter this item

Please join the discussion:
'What to say in error messages'

[https://designpatterns.hackpad.com/
What-to-say-in-error-messages-HiGXPZ7XiG0](https://designpatterns.hackpad.com/What-to-say-in-error-messages-HiGXPZ7XiG0)

Where you
put the pixels



Users don't want to read

The screenshot shows the MVA website's main page. At the top is the MVA logo and the tagline "Welcome to the Maryland Motor Vehicle Administration COMMITTED TO SAFETY, SERVICE, AND YOU". Below this is a navigation bar with links: Home, Email Us, Phone Numbers, Helpful Links, Site Map, and Hours & Locations. On the left, there's a "What's New" section with links to "MVA Programs About MVA" and "ONLINE SERVICES". The "ONLINE SERVICES" section lists: Change of Address, County Title Stickers, Download Forms, Driving Records, eMVA Store Home, PIN Management, Registration Renewal, and VUE Extension. Below this is a "Vehicle Services Driver Services" section with a "SEARCH" button. The main content area is titled "Maryland's Online Vehicle Registration Renewal". It includes a welcome message: "Welcome to e-MVA! In today's fast-paced world, the MVA understands the need to make our services more convenient for you. We aim to simplify your life, and now you can renew your vehicle registration right over the Internet. Here's how:" followed by two bullet points: "Follow the simple instructions." and "You will also need:". The second bullet point lists: "The vehicle title number", "The license plate number", and "A Visa, MasterCard or check (money orders & travelers checks not accepted)". At the bottom of this section is a large blue button labeled "Renew Your Vehicle".

The screenshot shows the "Important Information!" section of the MVA website. It features the same header and navigation bar as the previous screenshot. The "What's New" section is also present. The "ONLINE SERVICES" section lists: Change of Address, County Title Stickers, Download Forms, Driving Records, eMVA Store Home, PIN Management, Registration Renewal, and VUE Extension. Below this is a "Vehicle Services Driver Services" section with a "SEARCH" button. The main content area is titled "Important Information!". It includes a section "Who Can Use the eMVA On-Line Registration Renewal Service?" with the text: "Most people with a passenger vehicle, motorcycle, trailer or truck under 26,000 lbs. can use this service. To renew your registration, your tags must expire within the next two months, or have already expired. If you have outstanding parking tickets, insurance violations, etc., you cannot use this service and you will have to visit one of our [MVA Full Service Offices](#). If you have moved, you cannot use this service until you notify the MVA of your new address. If you have an MVA PIN, you can [change your address on-line](#), then renew your registration." Below this is a section "Insurance Information" with the text: "By completing this On-line Vehicle Registration Renewal, you are certifying, under penalty of perjury, that the vehicle for which the registration is being renewed is covered by at least the minimum amounts of insurance required by the Maryland Motor Vehicle Law. You are further certifying that this vehicle will be continuously insured throughout its registration period." At the bottom, it states: "Maryland law requires that you notify the MVA of any changes in your insurance. You can notify the MVA by e-mail at insurance@mdot.state.md.us. Your e-mail must include your name, address, vehicle title number, new insurance company name (not agency name) and policy number. The MVA will update your records by the next business day. If you would like additional information on Maryland's mandatory insurance law visit our Insurance Information page." At the very bottom, it says: "For questions or comments about on-line registrations, please e-mail us at".

Readers and rushers - tax forms



- Pensioners
- Lower-paid self-employed



- Tax office staff
- Accountants
- Higher-paid employed

Rushers do better



The Winner

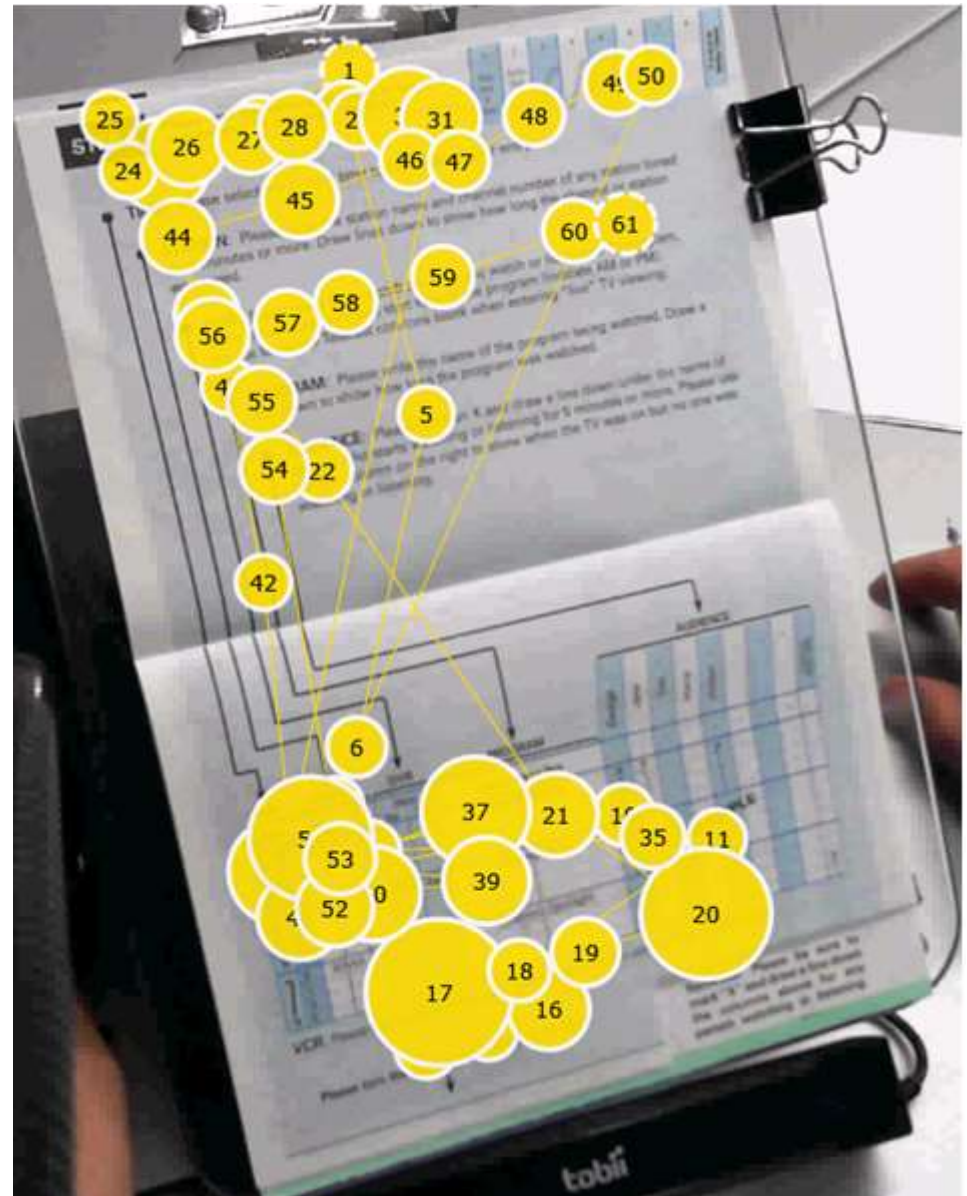
Users want a 'quick start'

“Officials need to take a behaviourally realistic view of how citizens fill in forms and to cut back the length of guidance leaflets as well as forms themselves.

Forms and guidance should be designed to facilitate a 'quick start' approach by people.”

National Audit Office 2002

People read forms differently





National Science Foundation
WHERE DISCOVERIES BEGIN



NATIONAL SURVEY OF COLLEGE GRADUATES

Please enter your username and password:

Username:

Password:

Login

For questions regarding this survey, contact:

nscg@census.gov

Phone: 1-888-262-5935

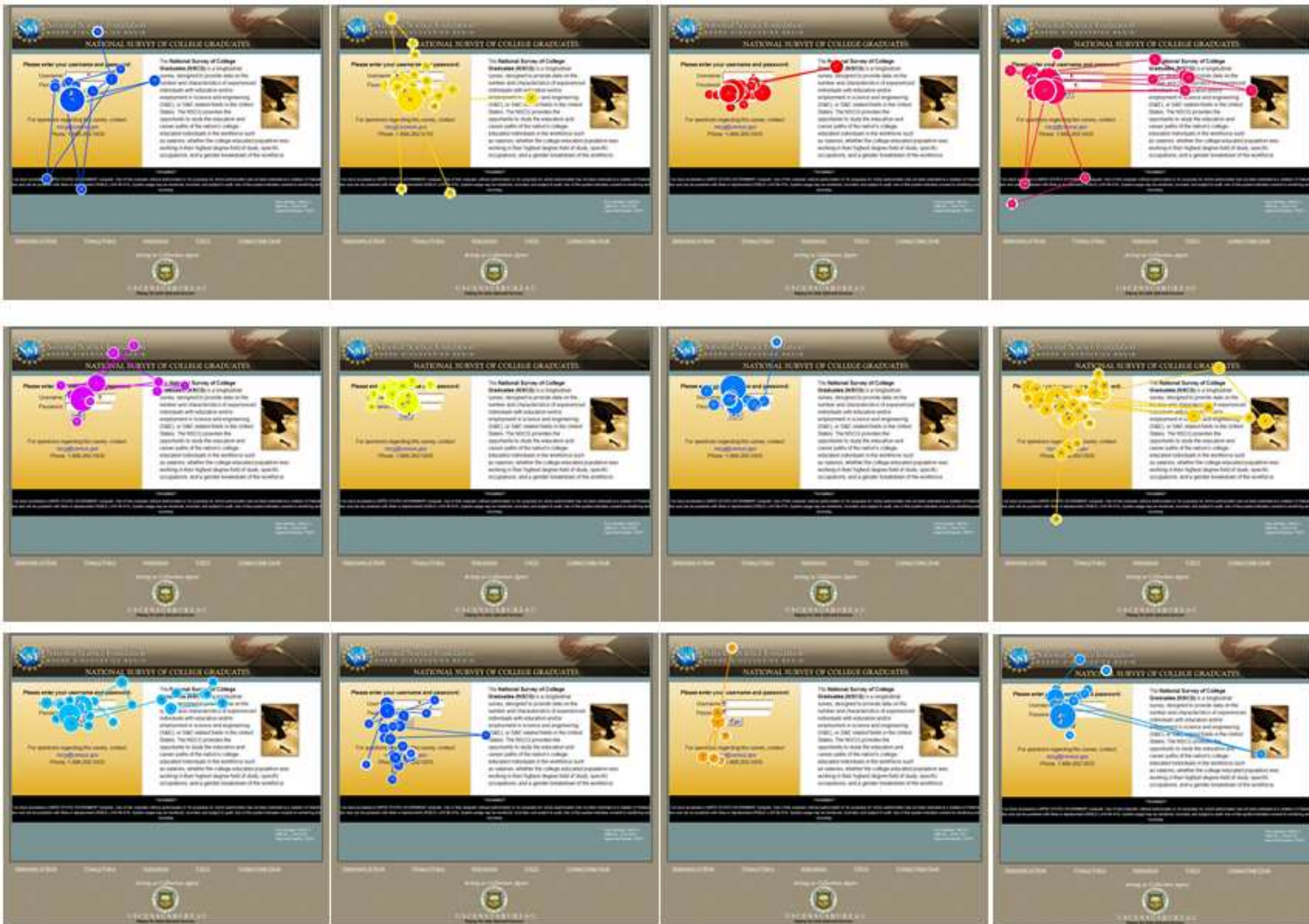
The **National Survey of College Graduates (NSCG)**

is a longitudinal survey, designed to provide data on the number and characteristics of experienced individuals with education and/or employment in science and engineering (S&E), or S&E related fields in the United States. The NSCG provides the opportunity to study the education and career paths of the nation's college-educated individuals in the workforce such as salaries, whether the college-educated population was working in their highest degree field of study, specific occupations, and a gender breakdown of the workforce.



****WARNING****


You have accessed a UNITED STATES GOVERNMENT computer. Use of this computer without authorization or for purposes for which authorization has not been extended is a violation of Federal law and can be punished with fines or imprisonment (PUBLIC LAW 99-474). System usage may be monitored, recorded, and subject to audit. Use of this system indicates consent to monitoring and recording.



Accept the 'box suction effect'



The screenshot shows the login page for the National Science Foundation's National Survey of College Graduates (NSCG). The page features the NSF logo and the text "WHERE DISCOVERIES BEGIN". The main heading is "NATIONAL SURVEY OF COLLEGE GRADUATES". On the left, there is a yellow oval containing the text "Please enter your username and password:" followed by input fields for "Username:" and "Password:", and a "Login" button. Below this, contact information is provided: "For questions regarding this survey, contact: nschg@census.gov Phone: 1-888-262-5935". On the right, a paragraph describes the NSCG as a longitudinal survey designed to provide data on the number and characteristics of experienced individuals with education and/or employment in science and engineering (S&E) or S&E related fields in the United States. It mentions that the survey provides the opportunity to study the education and career paths of the nation's college-educated individuals in the workforce, such as salaries, whether the college-educated population was working in their highest degree field of study, specific occupations, and a gender breakdown of the workforce. To the right of this text is a small image of a graduation cap. At the bottom, there is a "WARNING" section with a disclaimer about the use of the computer system, stating that it is a United States Government computer and that use without authorization is a violation of Federal law.

 National Science Foundation
WHERE DISCOVERIES BEGIN

NATIONAL SURVEY OF COLLEGE GRADUATES


Please enter your username and password:

Username:

Password:

For questions regarding this survey, contact:
nschg@census.gov
Phone: 1-888-262-5935

The National Survey of College Graduates (NSCG) is a longitudinal survey, designed to provide data on the number and characteristics of experienced individuals with education and/or employment in science and engineering (S&E) or S&E related fields in the United States. The NSCG provides the opportunity to study the education and career paths of the nation's college-educated individuals in the workforce such as salaries, whether the college-educated population was working in their highest degree field of study, specific occupations, and a gender breakdown of the workforce.



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Join us: working on design patterns

For published patterns, search for:
“service manual design patterns”

Or join us on
<https://designpatterns.hackpad.com>

More slides <http://www.slideshare.net/cjforms>

Forms that work

Understanding forms to
improve their design

Design tips for surveys 2012

Caroline Jarrett

User Interface Engineering / Rosenfeld Media Seminar



Design tips for complex forms Malta 2012

Caroline Jarrett



Design tips for complex forms 2011

Caroline Jarrett

J.Boye Conference Denmark



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