

How to design a form

Let's discuss a possible curriculum for a training course

@leedsmeetup comments

I tried out some ideas at the Leeds meetup

These slides come from a session at the meetup on 27th February 2019. I threw various slides and ideas at people, because I knew that those meetups attract a knowledgeable and friendly crowd.

When you see a slide with @leedsgovdesign comments at the top, I've added it afterwards.

Sometimes the comments come from attendees, sometimes they capture something I said but didn't have a slide for, sometimes they're my reflections.

Many thanks to Simon Wilson for organising and to everyone who came.

We need advice on 'how to design a form'

I'm working with the NHS Digital Standards and Redesign team. We recently had results from usability testing a form, built by a team of colleagues from the NHS Digital Front-End library. The form didn't test well, and we realised that it was probably because we offer little advice about how to design a form using the patterns in the library. We know that some teams won't have access to any designers.

These slides contain some ideas about what might go into that curriculum. The curriculum might become a training session, or might become advice online, or the need might be met some other way.

@leedsmeetup comments

Ian Roddis published about the need for advice while I was typing up these notes

The path of user needs, avoiding beautiful nonsense, and the shelves of wisdom



ian roddis [Follow](#)

Mar 1 · 4 min read

At work we like a good metaphor, even more so if we can tweet about it in an abstract fashion without revealing too much of the inner workings of our professional lives.

So this post is going to freely use a couple of metaphors to put in context the

<https://medium.com/@ianroddis/the-path-of-user-needs-avoiding-beautiful-nonsense-and-the-shelves-of-wisdom-fe19a9b7bff3>

This talk is inspired by Ralph Hawkins



Cabinet Office

Ralph Hawkins

Service designer

Government Digital Service

@ralph_hawkins

@leedsmeetup comments

Please use and discuss these slides

This talk was inspired by one that Ralph Hawkins did at the GDS Forms-a-Palooza in January 2019. He described how to design a form and I've used some of his ideas and slides here.

If I've got a slide, or something on it, from somewhere else then there's a credit. If there isn't a credit and there ought to be then please tell me and I'll correct it.

Anything I've created is 'Creative commons' licensed, meaning: Please use it and say where you got it from.

I'm very keen for people to try out these slides and tell me what works and what doesn't.

How to design a form

1. Investigate your forms
2. Write the questions
3. Get the questions into order
4. Put the questions onto pages

I asked attendees what was missing from the four steps

Most of the suggestions were topics that I had included, but weren't obvious from the four steps. I'll mention these later.

Attendees pointed out that I had skipped:

- Identify user needs
- What do the users want?
- Why? (what are the objectives?)
- Are we starting from scratch or starting with an existing form?
- What are the outputs? (measures of success?)
- Consider the medium
- Prerequisites, for example what do people need to fill in the form? And how do they get it?
- Who to include when designing a form (team, helpers and stakeholders)

Join in the discussion about the need for a form

Because of comments around needs, I started a discussion on Twitter. People joined in with great comments. I've got lots to think about.



Caroline Jarrett

@cjforms



Thought for the day:

There is no user need for a form.
Users have needs for what they get by filling
in the form, but not for the form itself.

Discuss?

[#GovDesign](#)

How to design a form

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 - Find out how you'll use the answers
 - Observe people working with the forms
 - Observe users filling in the forms
2. Write the questions
 - Create a question protocol
 - Interview users about the topics on the form
3. Get the questions into order
 - Start with one thing per page
 - Provide a sense of control
 - Do card sorting with users for order of topics
4. Put the questions onto pages
 - Use the simplest possible interaction design
 - Put the right button in the right place
 - Do usability testing with users

Attendees did not recognise some terms

I asked attendees if there was anything in the expanded list of topics that they did not recognise. As I expected (knowledgeable crowd) nearly everything was reasonably familiar, with these exceptions:

- ‘question protocol’
- ‘sense of control’

We return to those topics later.

Activities with users in red with an asterisk

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Investigate your forms

Start by reading the actual law

STATUTORY INSTRUMENTS

1997 No. 3008

**LANDLORD AND TENANT,
ENGLAND AND WALES**

The Long Residential Tenancies
(Principal Forms) Regulations 1997

Example from Ralph Hawkins

Sometimes the law prescribes the form

Prescribed Forms

Form 1(long residential tenancies)Landlord's Notice Terminating Long Residential Tenancy and Proposing Assured Tenancy

Paragraph 4(1) of Schedule 10 to the Local Government and Housing Act 1989

*The landlord **must** cross out any text in square brackets which does not apply.*

- This notice will end your existing long residential tenancy and contains a proposal to replace it with an assured periodic tenancy.
- Please read this notice carefully. **There are time limits which you must keep to.** If you need help or advice about this notice, you should take it immediately to any of the following:
 - a Citizens' Advice Bureau
 - a housing aid centre
 - a law centre
 - a solicitor.
- Please read the notes at the end of the form.

1. To:

Insert name[s] of tenant[s].

2. From:

of:

.....
.....

Insert name[s] and address of landlord[s].

(see note 1)

Example from Ralph Hawkins

Read filled-in forms to establish the error rates

Part 1: Veteran's/ Service Person's Details:

Title

Surname

Any other names held during service

Place of Birth

Date of Birth

Service Number

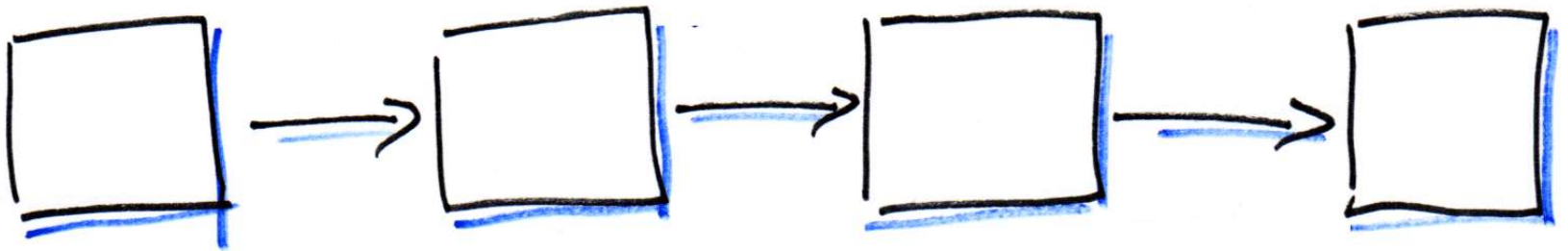
Service/ Regiment/ Corps on enlistment

Service/ Regiment/ Corps on enlistment

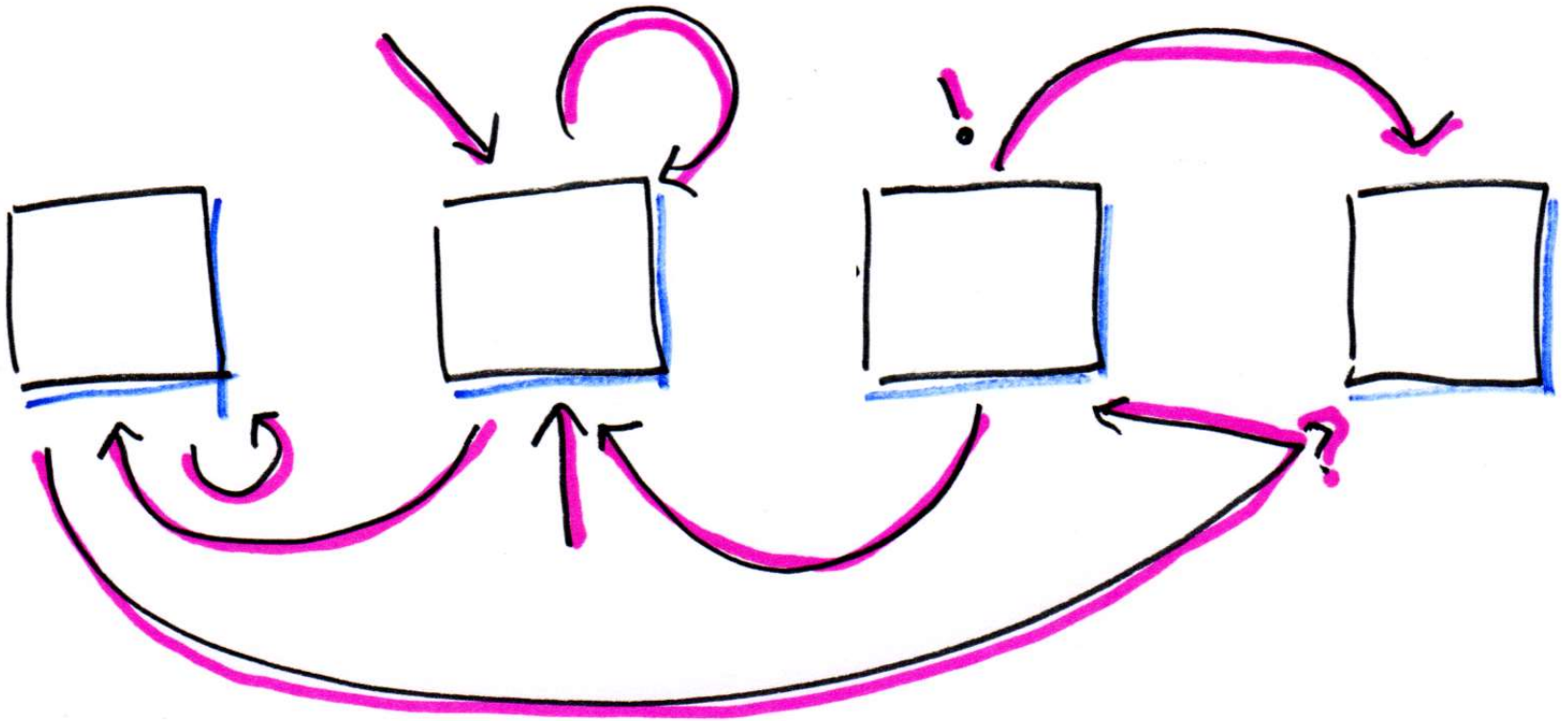
THOMAS

Example from Ralph Hawkins

Map the 'assumption' process



Observe the actual process



Attendees wanted to know the outcomes of each step

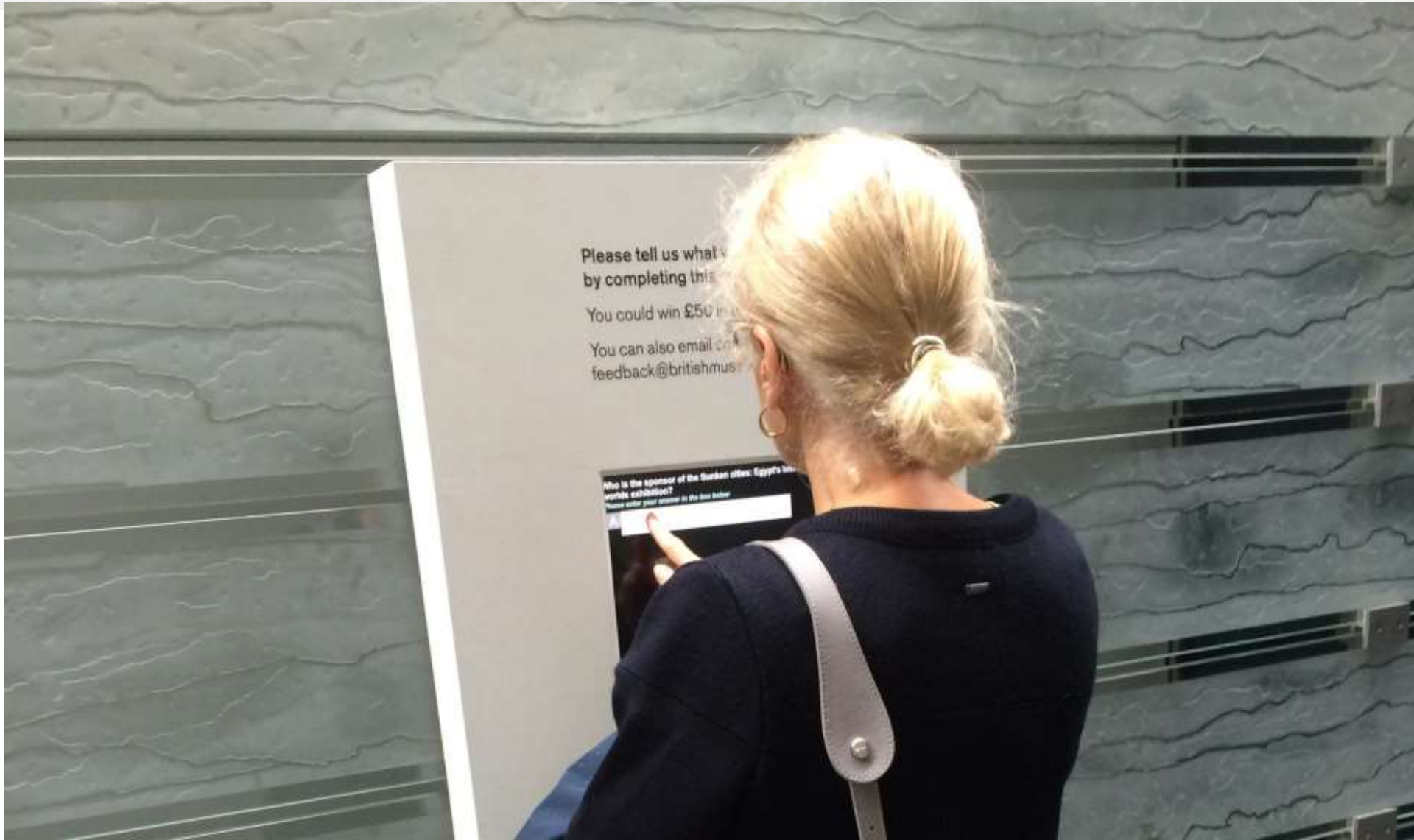
It's not obvious that 'Observe the actual process' is intended to include:

- Find out who is using the forms
- Get to know the processes and technology behind the forms
- Establish metrics such as failure rates, error rates, any other performance issues

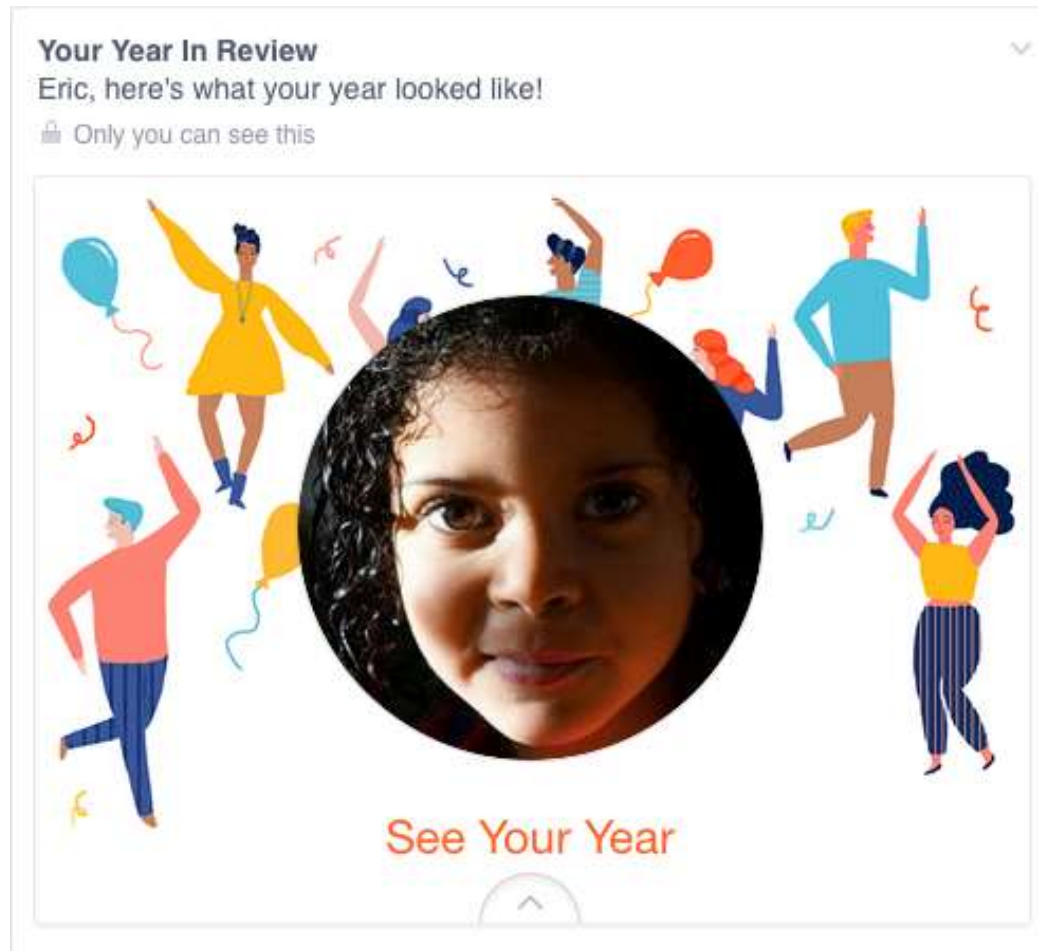
Observe people dealing with forms



Observe users filling in the forms



Find out about people in crisis



<https://meyerweb.com/eric/thoughts/2014/12/24/inadvertent-algorithmic-cruelty/>

@leedsmeetup comments

Missing topic: accessibility and inclusivity

I explicitly mentioned 'find out about people in crisis'.

Attendees pointed out that we also need to be explicit about designing for accessibility and inclusivity, right from the start.

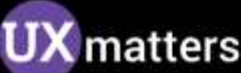
Write the questions

GDPR is your friend

“Any processing of personal data should be lawful and fair. It should be transparent to natural persons that personal data concerning them are collected, used, consulted or otherwise processed and to what extent the personal data are or will be processed”.

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016R0679>


Create your question protocol

 *Insights and inspiration for the user experience community*

HOME TOP ARTICLES TOPICS COLUMNS AUTHORS GLOSSARY



Design

The Question Protocol: How to Make Sure Every Form Field Is Necessary



Good Questions

Asking and answering users' questions
A column by **Caroline Jarrett**

June 7, 2010  2 Comments  1 Share

One of the nicest things about being an author is that, from time to time, people write to say

“A question protocol is a tool for finding out which form

<https://www.uxmatters.com/mt/archives/2010/06>

[the-question-protocol-how-to-make-sure-every-form-field-is-necessary.php](https://www.uxmatters.com/mt/archives/2010/06/the-question-protocol-how-to-make-sure-every-form-field-is-necessary.php)

The question protocol includes validation rules

It wasn't obvious to attendees that a question protocol includes:

- The validation rules
- The text of error messages
- The reason you are obtaining every answer and how you will obtain that answer (not always by asking a user a question)

We need a clearer name for ‘question protocol’

The term ‘question protocol’ is jargon that is unfamiliar to attendees.

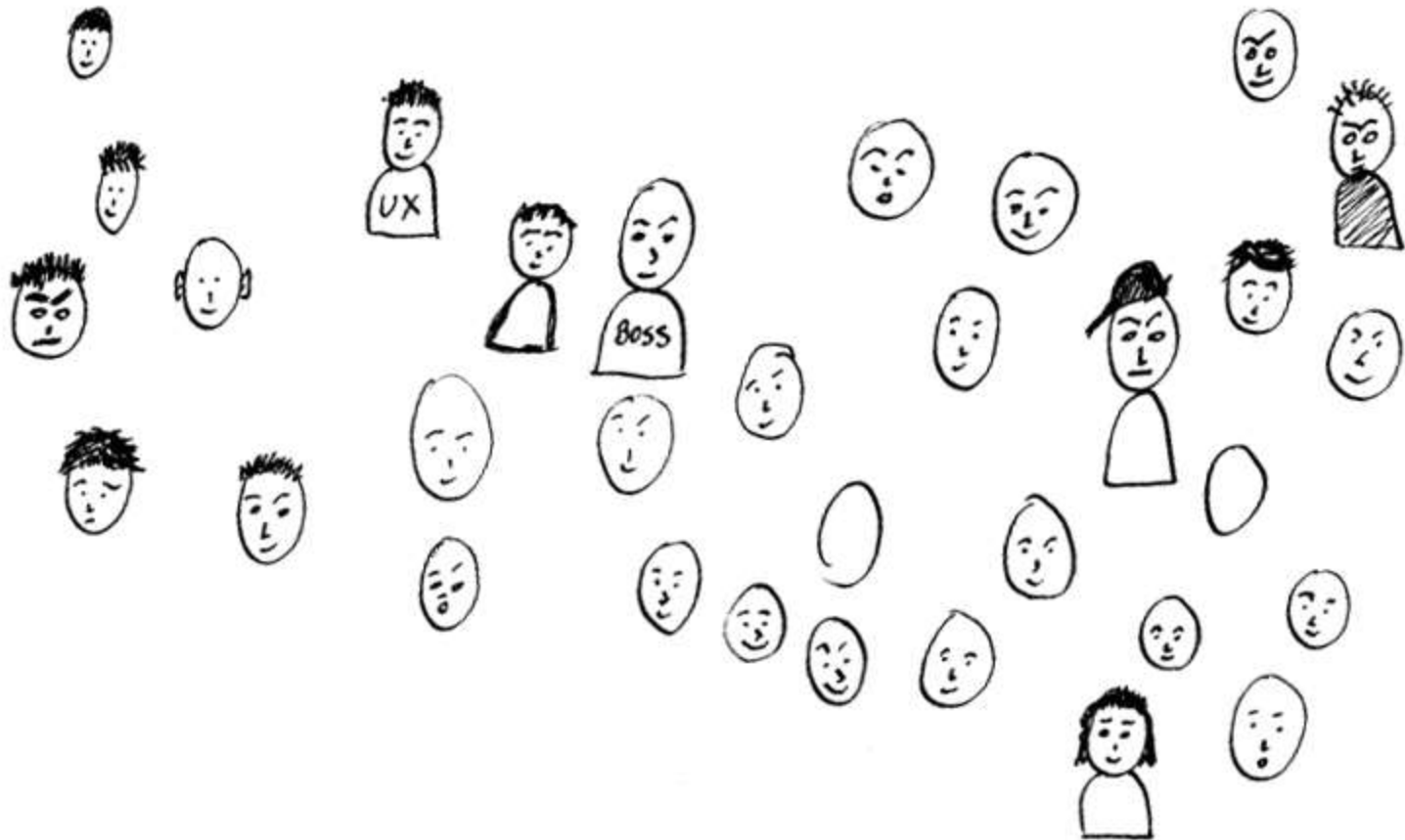
We briefly discussed some alternatives, including Jessica Enders’ term ‘Question by Question’.

I’d like to find out whether we need to invent jargon here, or whether there is a term for this that is already in use and works better than ‘question protocol’.

Track a sample of forms through your process
to find out how you use the answers

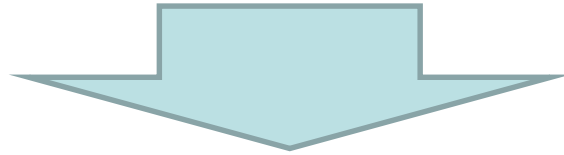


Interview users about the topics in your form



Translate the questions into 'user'

'Are you a director of a close company?'



'Are you a director?'

'Are you a director of a close company?'

Get the questions
into order

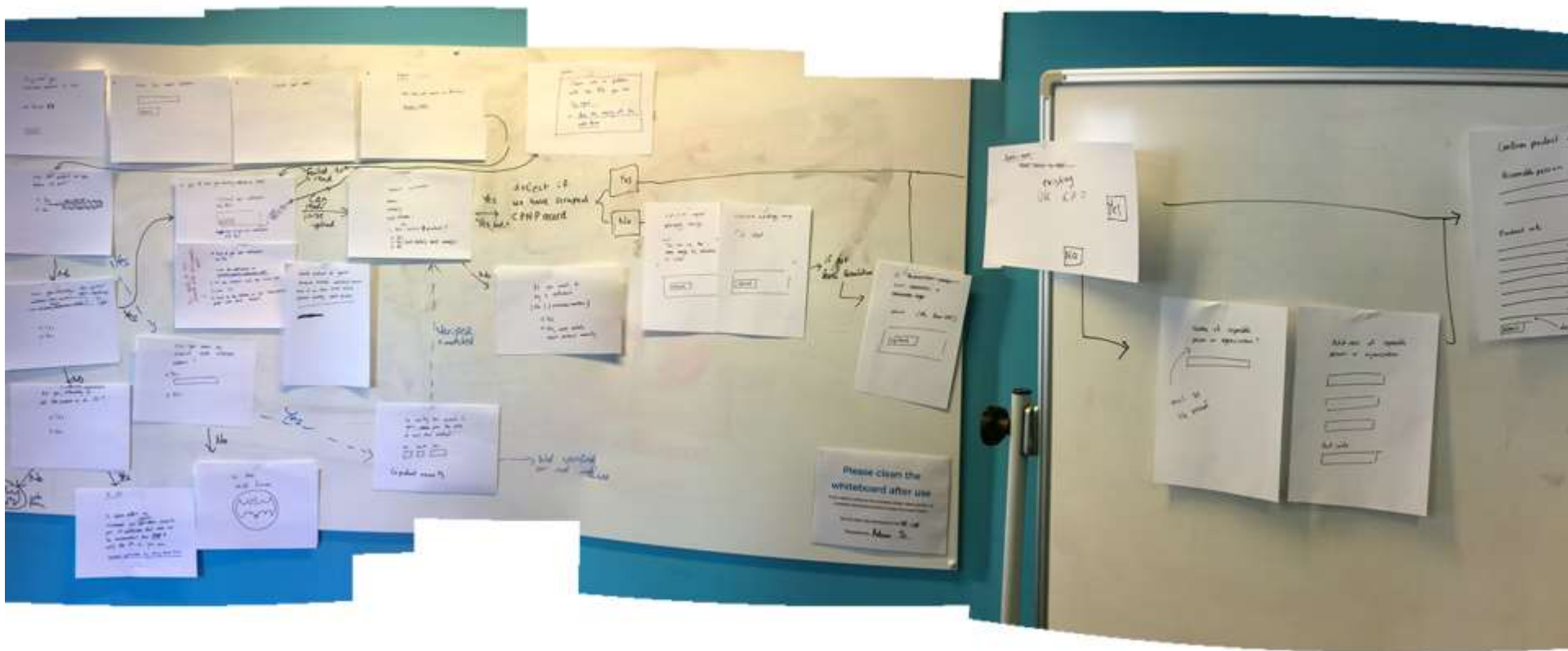
Start with one thing per page

Page contents:

- Design your forms for the format they'll appear in
- Know why you're asking every question
- Design for the most common scenarios first
- **Start with one thing per page**
- Structure your form to help users
- Further reading
- Related guides

<https://www.gov.uk/service-manual/design/form-structure>

Create a prototype map/wall



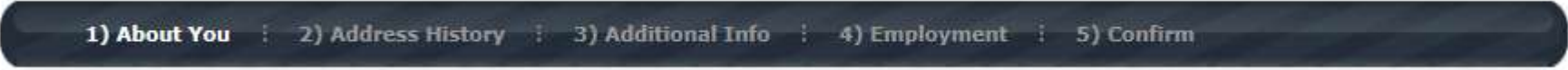
Example from Ralph Hawkins

Get the questions
into order

Provide
a sense of control

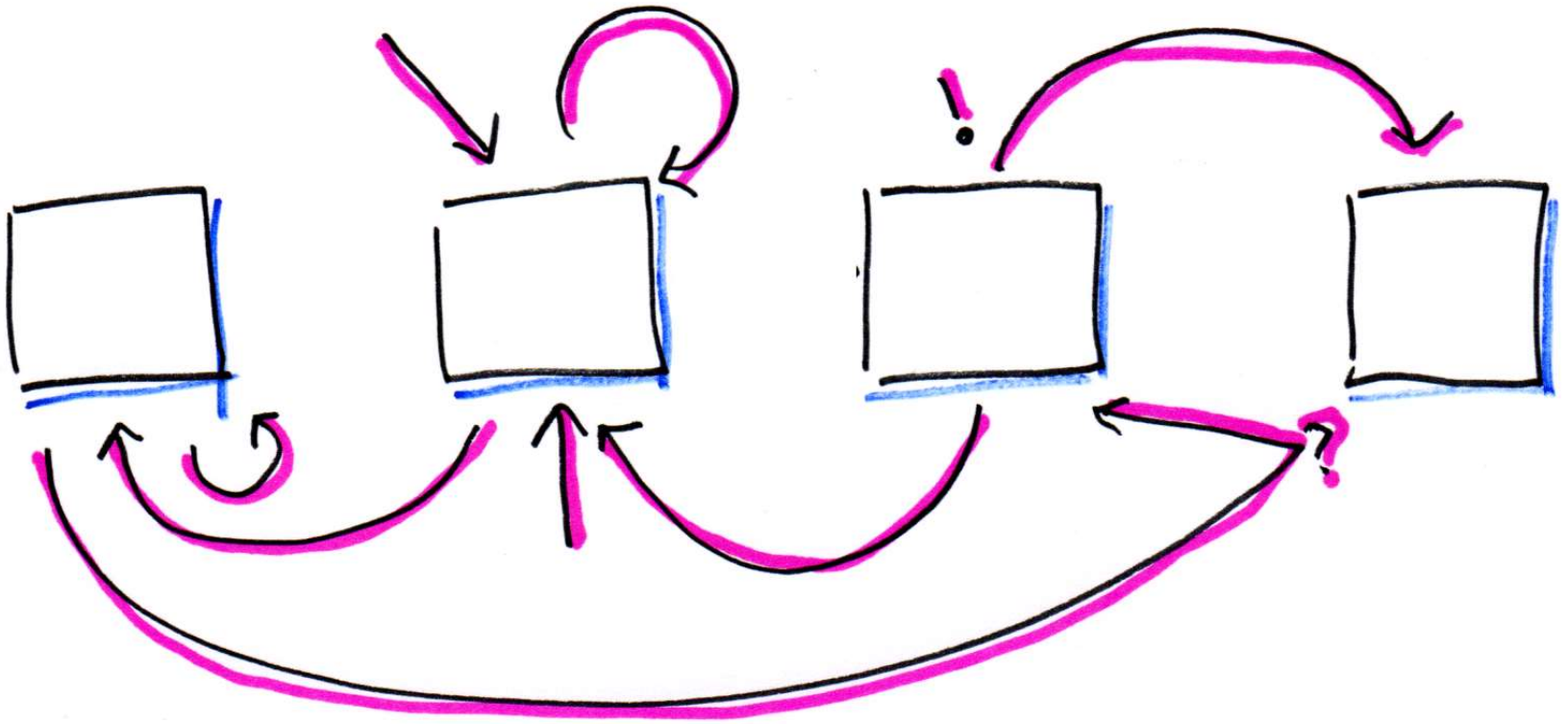
Progress indicators do not work

- Simple forms don't need them
- 'Step by step' indicators aren't flexible enough
- Difficult forms need summary pages



1) About You : 2) Address History : 3) Additional Info : 4) Employment : 5) Confirm


Real journeys are complex



A successful summary screen gives control

- You can access each step in any order
- You can see which step(s) are un-started, partially complete, fully done
- Each step “knows” which step is usually next
- Each step “knows” if it can’t be done yet
- You can see steps that are about things other than filling in the form:
 - Steps in the organisation’s control
 - Steps that are purely about reading content
 - Steps that mean obtaining documents from elsewhere
 - Anything else that you have to do to get to your goal

'Check your answers' is an overview

 **GOV.UK**

Service name

[◀ Back](#)

Check your answers before sending your application

Personal details

Name	Sarah Philips	Change
Date of birth	5 January 1978	Change
Contact information	72 Guild Street London SE23 6FH	Change
Contact details	07700 900457 sarah.phillips@example.com	Change

Application details

Previous application number	502135326	Change
Licence type	For personal use	Change
Home address	72 Guild Street	Change

'Task list' is a (sort of) preview

Service name goes here

1. Check before you start

[Check eligibility](#)

COMPLETED

[Read declaration](#)

COMPLETED

2. Prepare application

[Company information](#)

COMPLETED

[Your contact details](#)

COMPLETED

[List convictions](#)

[Provide financial evidence](#)


[Give medical information](#)

COMPLETED

3. Apply

[Submit and pay](#)

'Step by step' provides an order



[Home](#) > [Employing people](#) > [Recruiting and hiring](#)

Employ someone: step by step

Check what you need to do to employ someone to work for you.

[Hide all](#)

1

Check your business is ready to employ staff

[Hide](#)

[Prepare your business to take on employees](#)

2

Recruit someone

[Hide](#)

You need to advertise the role and interview candidates. You can use a recruitment agency to do this or do it yourself.

[Find out about recruiting someone yourself on Acas](#)

[Find out about using a recruitment agency](#)

Do card sorting with users for order of topics

- Eligibility first?
- Easy questions first?
- Filter questions first?
- Signing ceremonies and signatures at the end

Put the questions
onto pages

Create a prototype (usually a paper/electronic hybrid)

1

Register as a buyer of 'first-sale' fish

You need to register as a buyer of 'first-sale' fish if all of the following apply:

- you're buying fish that was landed in the UK
- you're buying fish or shellfish directly from a fishing vessel
- you're buying more than 10kg of fish per day

You don't need to register if you buy fish from a:

- designated auction site
- merchant or wholesaler (this is 'second sale')
- fish farm

Registering as a business

You'll need to upload documents to prove the address where you keep your records.

Registering as an individual

You'll need to prove your identity and the address where you keep your records. You might be able to do this by:

- using GOV.UK Verify
- uploading documents

[Find out more](#)

2

Where will you buy first-sale fish?

☐ England
☐ Northern Ireland
☐ Scotland
☐ Wales

3

Are you buying first-sale fish as a business or an individual?

☐ Business - LIMITED company, partnership, sole trader or self-employed
☐ Individual

4

If 'Are you buying first-sale fish as a business or individual?' is 'Individual'

Do you want to prove your identity using GOV.UK Verify?

You can use GOV.UK Verify to prove your identity.

If you don't use Verify, you'll need to prove your identity with a scan or photo of either:

- your current UK passport
- your current UK or Isle of Man driving licence
- a bank statement from the last 3 months
- a utility bill from the last 3 months

To prove your address you will need a scan or photo of either:

- your most recent council tax bill
- a utility bill from the last 3 months (this cannot be the same as the document used to prove your identity)

How GOV.UK Verify?

☐ Yes
☐ No, upload documents to prove my identity

Example from Ralph Hawkins

Use Ralph's conventions for speedy design

() radio buttons

[] check boxes

[] text input

{{ dynamic content }}

An example of design-in-a-document

Where do you live?

- ☐ England**
- ☐ Scotland**
- ☐ Wales**
- ☐ Northern Ireland**
- ☐ Other**

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

Town/City* LEIGHTON BUZZARD

County Beds

Postcode

Title* (Choose) v

Other title

First Name*

Last Name*

Gender* (Choose) v

OU Personal Identifier (if known)

Date of Birth (DD-MM-YYYY) - -

3 Looks here last

1
Looks here first for button

2 Then looks here

Label the buttons with what they do



Usability test your form with users



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A great form works well across all three layers

Appearance

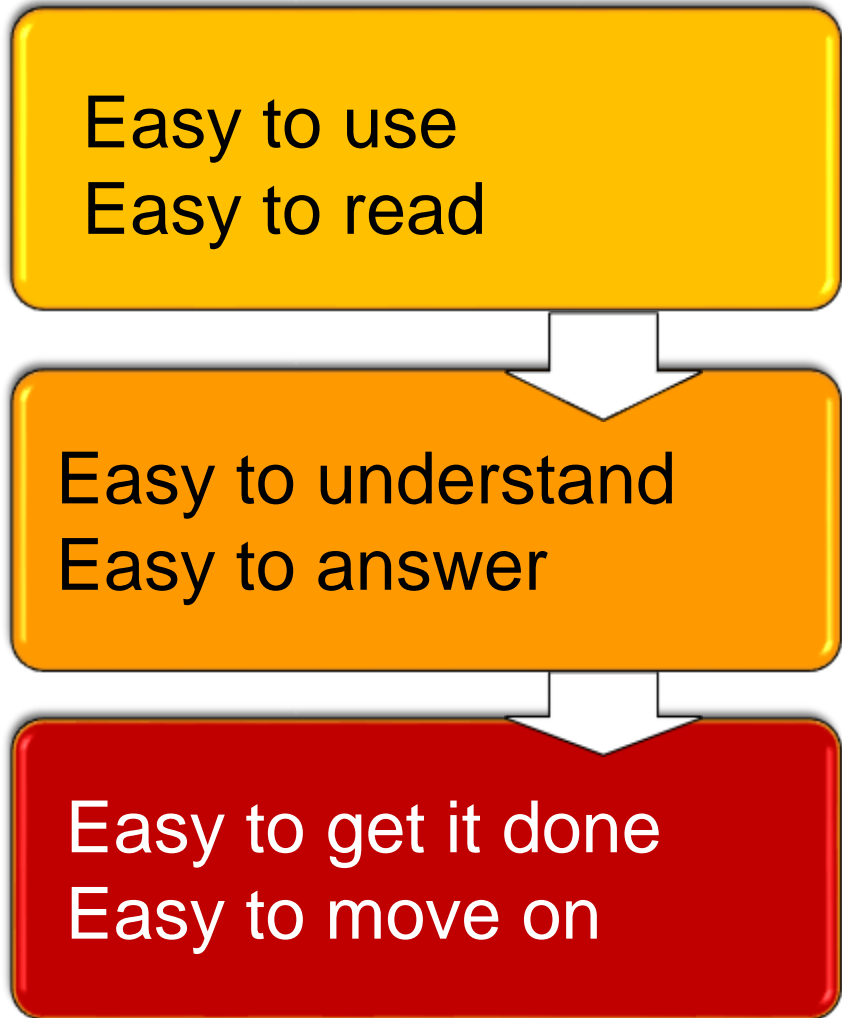
Easy to use
Easy to read

Conversation

Easy to understand
Easy to answer

Relationship

Easy to get it done
Easy to move on



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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