



How to design a form

Let's discuss a topic map

I was inspired to start this by a talk by
Ralph Hawkins. Then I tried it out in Leeds.



Ralph Hawkins

Service designer

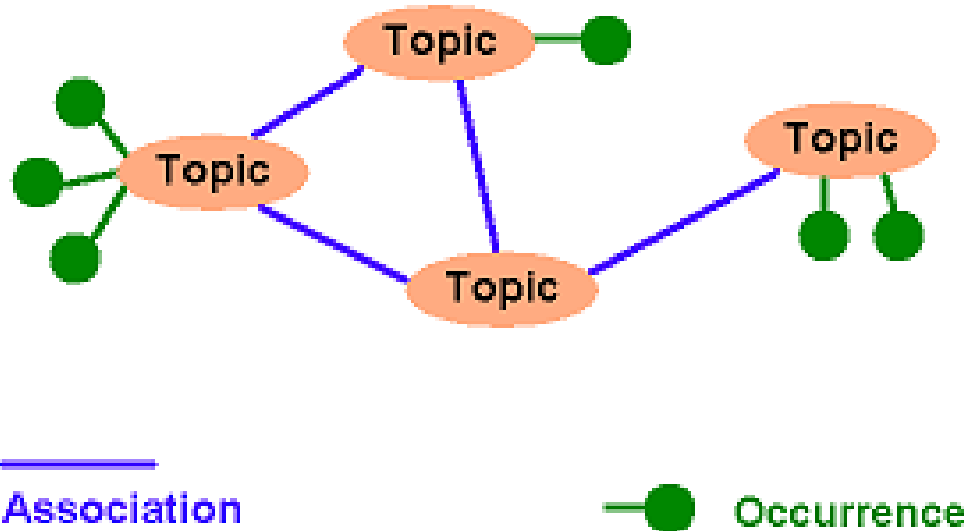
Government Digital Service

@ralph_hawkins



**Trying a previous version
in Leeds, UK**

A 'topic map' shows the relationships between areas of knowledge



This is a two-step process for designing a form

1. Get the questions
2. Put the questions onto pages

Do you have topics you want to add?

1. Get the questions
2. Put the questions onto pages



Old paper form + magic of digital = ????

1. Get the questions

2. Put the questions onto pages

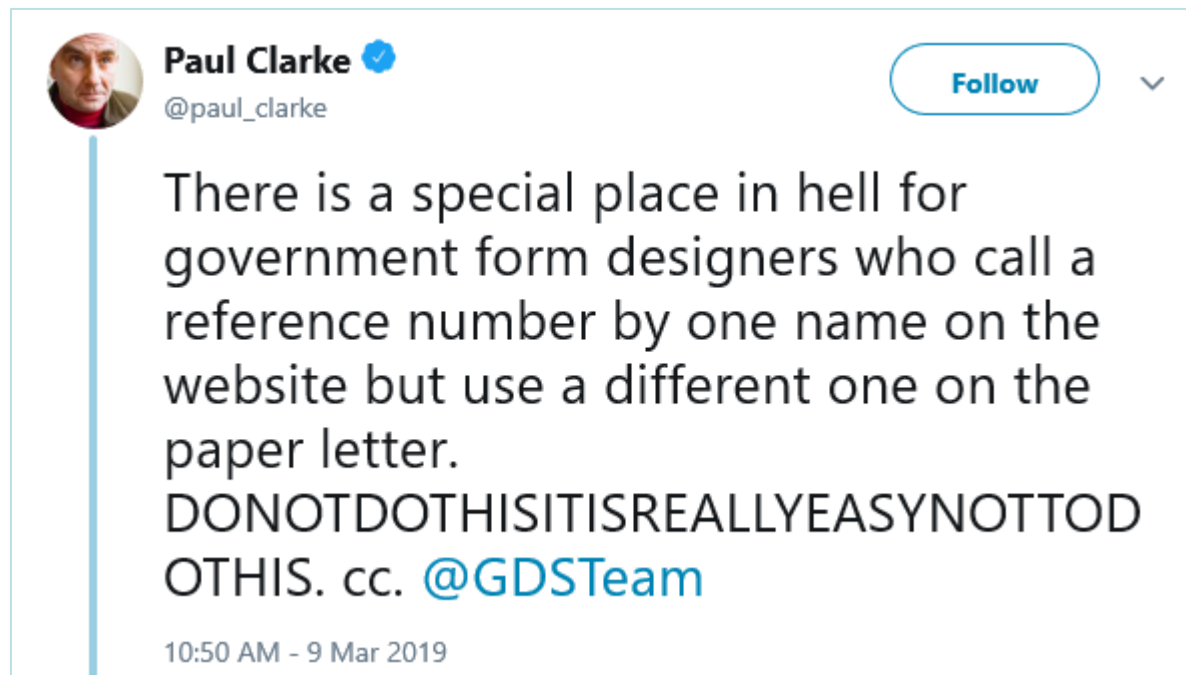
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https://www.researchgate.net/publication/312012851_Electronic_Referrals_and_Digital_Imaging_Systems_in_Ophthalmology_A_Global_Perspective/figures?lo=1

https://upload.wikimedia.org/wikipedia/commons/thumb/6/66/Cartoon_Man_Approving_His_New_Computer.svg

People struggle with bad forms every day



Where is the advice for designers about using consistent reference numbers?



Digital service manual

Design and build digital services for the NHS

Things you need to make consistent, usable services that put people first.

[Design principles](#)

These principles guide all

[Frontend library](#)

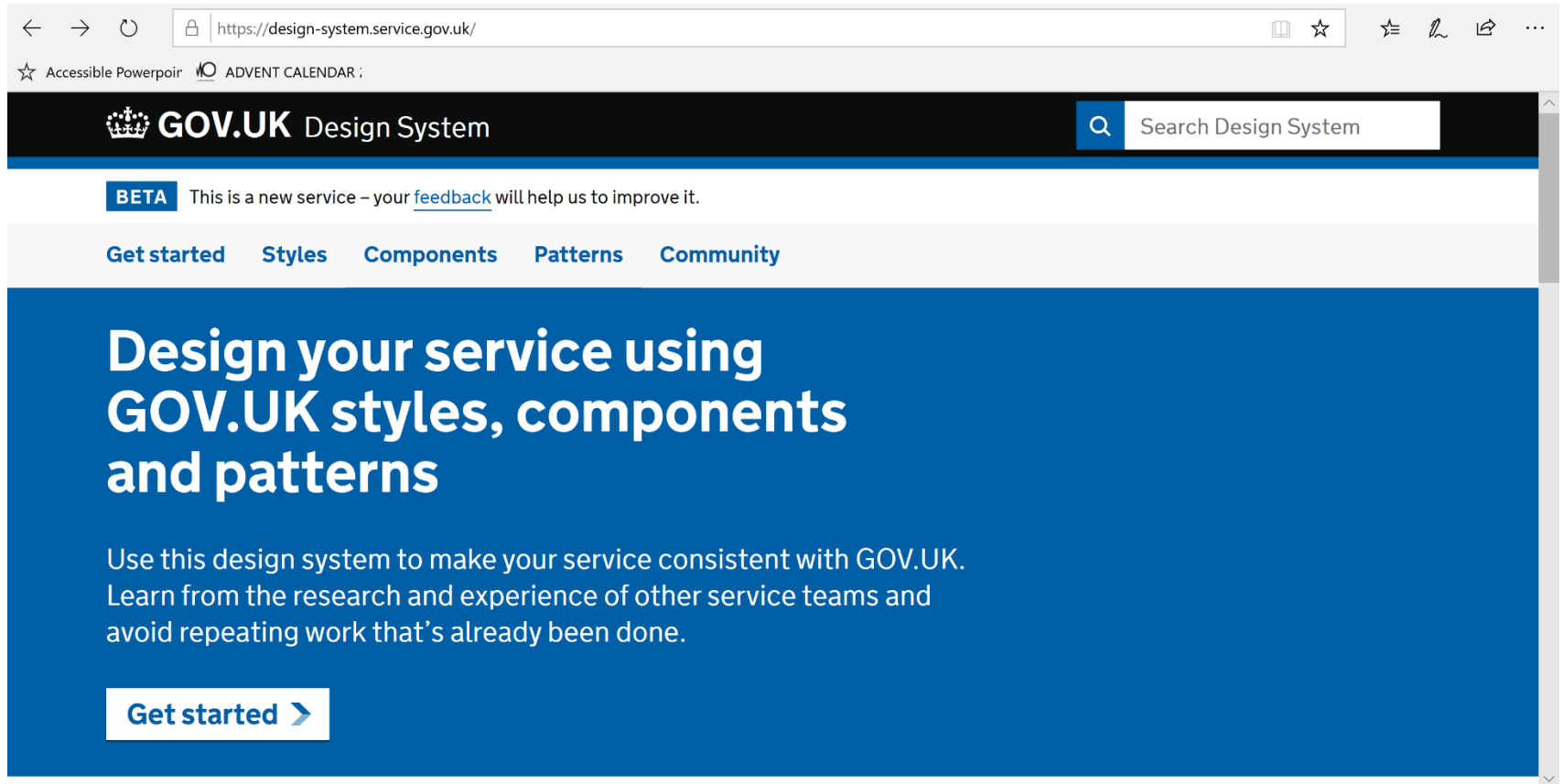
Production code to start

[Prototyping tools](#)

Build prototypes or

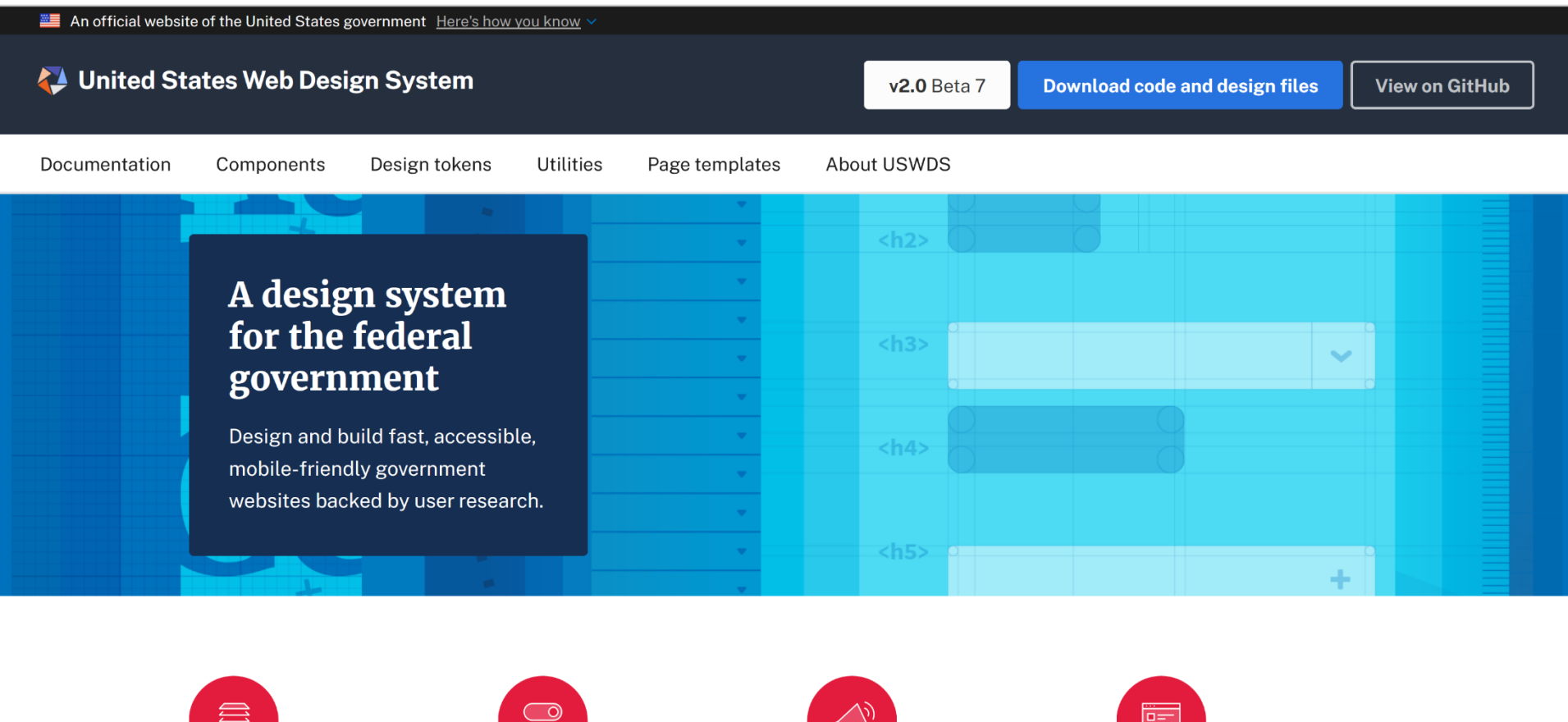
<https://beta.nhs.uk/service-manual>

Where is the advice for designers about using consistent reference numbers?



<https://design-system.service.gov.uk/>

Where is the advice for designers about using consistent reference numbers?



<https://v2.designsystem.digital.gov/>

Our design systems are good at high-level advice. We all have 'Design Principles'.

8 Do the hard work to make it simple

Healthcare journeys can be complex. Take the time to understand what you are trying to solve. Do not push complexity onto the people using what you are designing.

<https://beta.nhs.uk/service-manual/design-principles>

And our design systems are good at component-level advice

UI COMPONENTS

Buttons

Use buttons to signal actions.

PRIMARY BUTTONS



SECONDARY BUTTONS



<https://designsystem.digital.gov/components/buttons/>

In the UK, we offer advice on language



Digital service manual

[Home](#)

Content style guide

How to write for digital NHS services.

[How we write](#)

Our general principles.

[Voice and tone](#)

The way we talk in different contexts.

[Inclusive language](#)

Writing for everyone in a way that's inclusive and respectful.

[Writing for accessibility](#)

Meeting the Web Content Accessibility Guidelines (WCAG 2.0).

[Formatting and punctuation](#)

From abbreviations to question marks.

[A to Z of NHS health writing](#)


Words and phrases which make our content easy to understand.

[Links and PDFs](#)

Writing good links and making PDFs accessible.

<https://beta.nhs.uk/service-manual/content>

In the US, you have plainlanguage.gov

 An official website of the United States government

[Home](#)[Law and requirements](#)[Plain language guidelines](#)[Examples](#)[Training](#)[Resources](#)[About](#)

IN THIS SECTION

[Before and after](#)[Award winners](#)[Reports and brochures](#)[Handbooks and manuals](#)[Letters and notices](#)[Regulations](#)

Examples

Plain language has been around in the government for over 40 years. Here are some examples, both historical and current.

- [Before and after](#)
- [Award winners](#)
- [Reports and brochures](#)
- [Handbooks and manuals](#)
- [Letters and notices](#)
- [Regulations](#)

<https://plainlanguage.gov/examples/>

Our designers know about “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>

Some examples of what I mean by topics

- Detailed topics:
 - Good services are verbs not nouns
 - Kill your select boxes / avoid drop-downs
 - Use words that your users understand
- Process topics:
 - Start with one thing per page
 - Understand user needs
 - Do usability testing
- Over-arching principles:
 - Do the hard work to make it simple
 - Make it easy to do the right thing

Some examples of topics that we might decide to add or to create

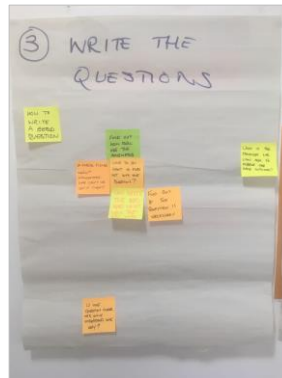
- Detailed topics:
 - Same thing -> same name; different thing -> different name
 - Avoid double-barrelled questions (two questions in one)
 - Label the button with what it does
- Process topics:
 - Observe colleagues dealing with forms to understand their workflow
 - Do card-sorting with users to understand which questions go together
 - Start your paper form design ahead of the digital equivalent
- Over-arching principles:
 - If you don't know what you will do with the answer, don't ask the question
 - Make use of information that you already have

Colleagues at NHS Digital did some topic suggestion and grouping for me

Get the questions



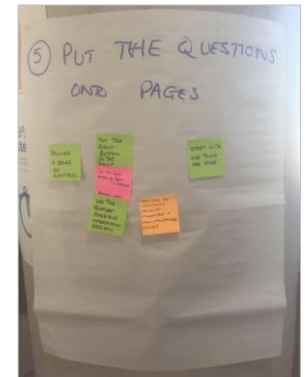
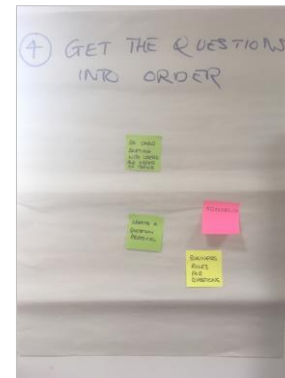
Write the questions



Usability testing



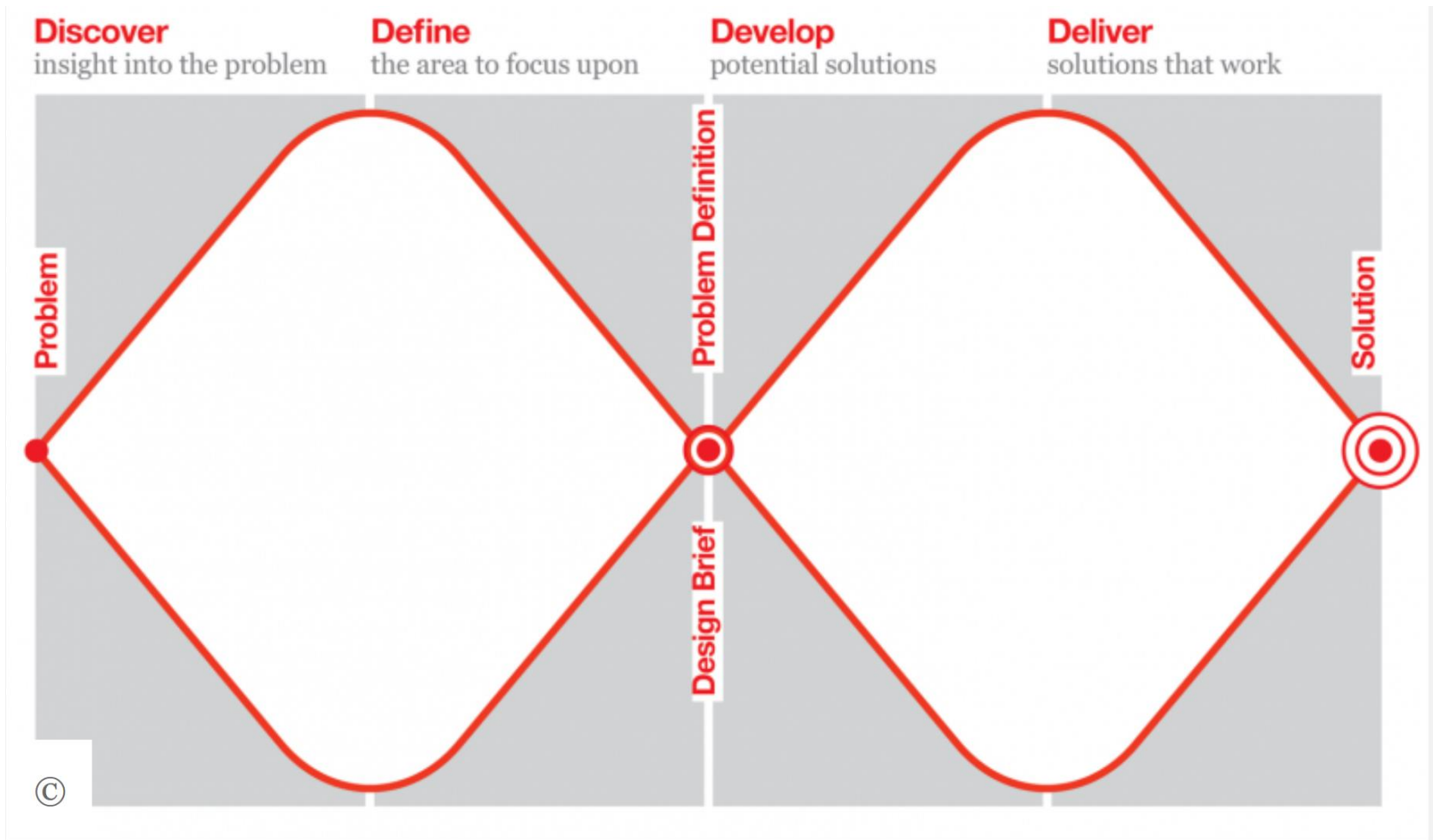
Put the questions onto pages



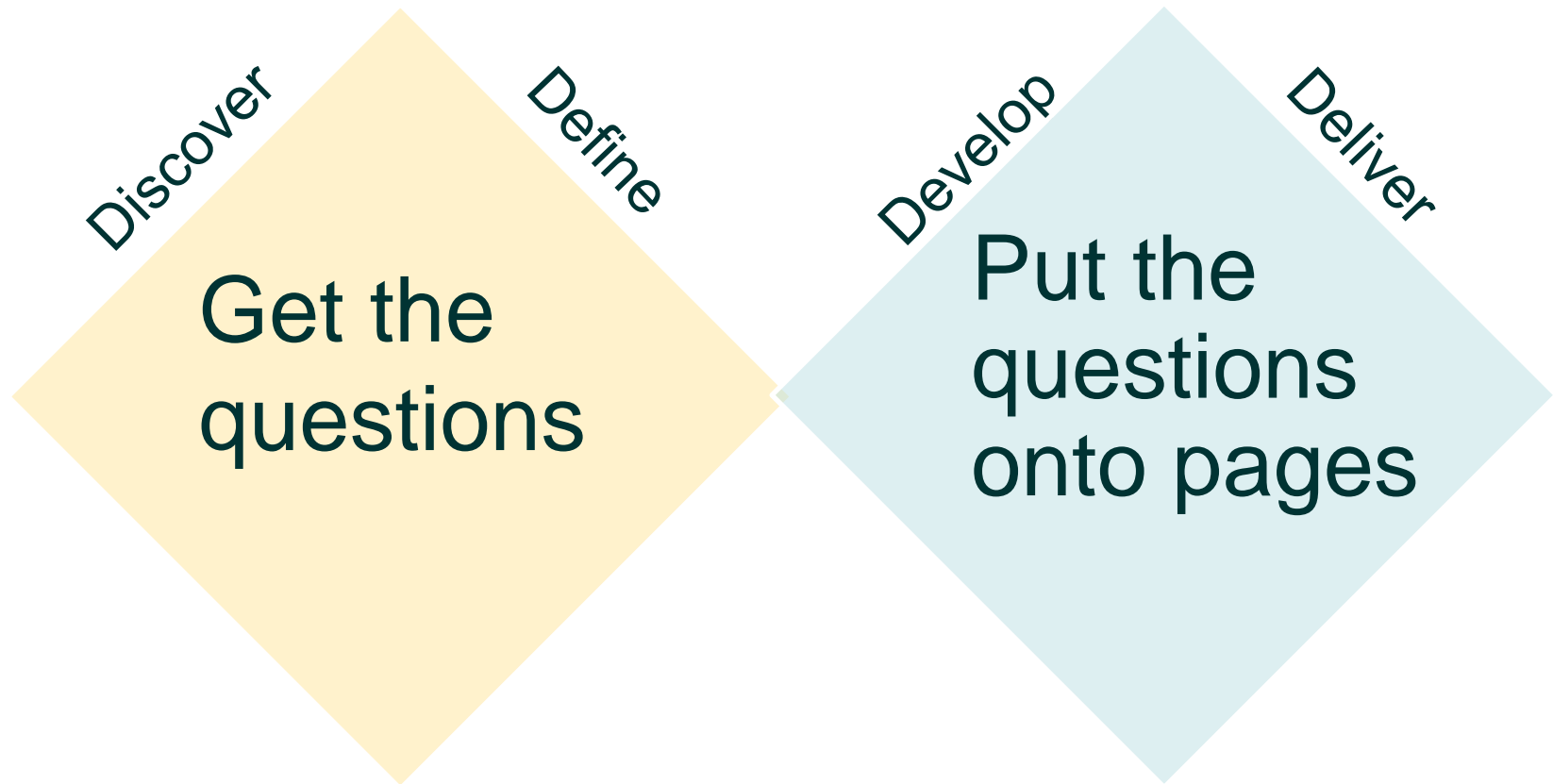
Dean Vipond suggested another look at the 2-step process

1. Get the questions
2. Put the questions onto pages

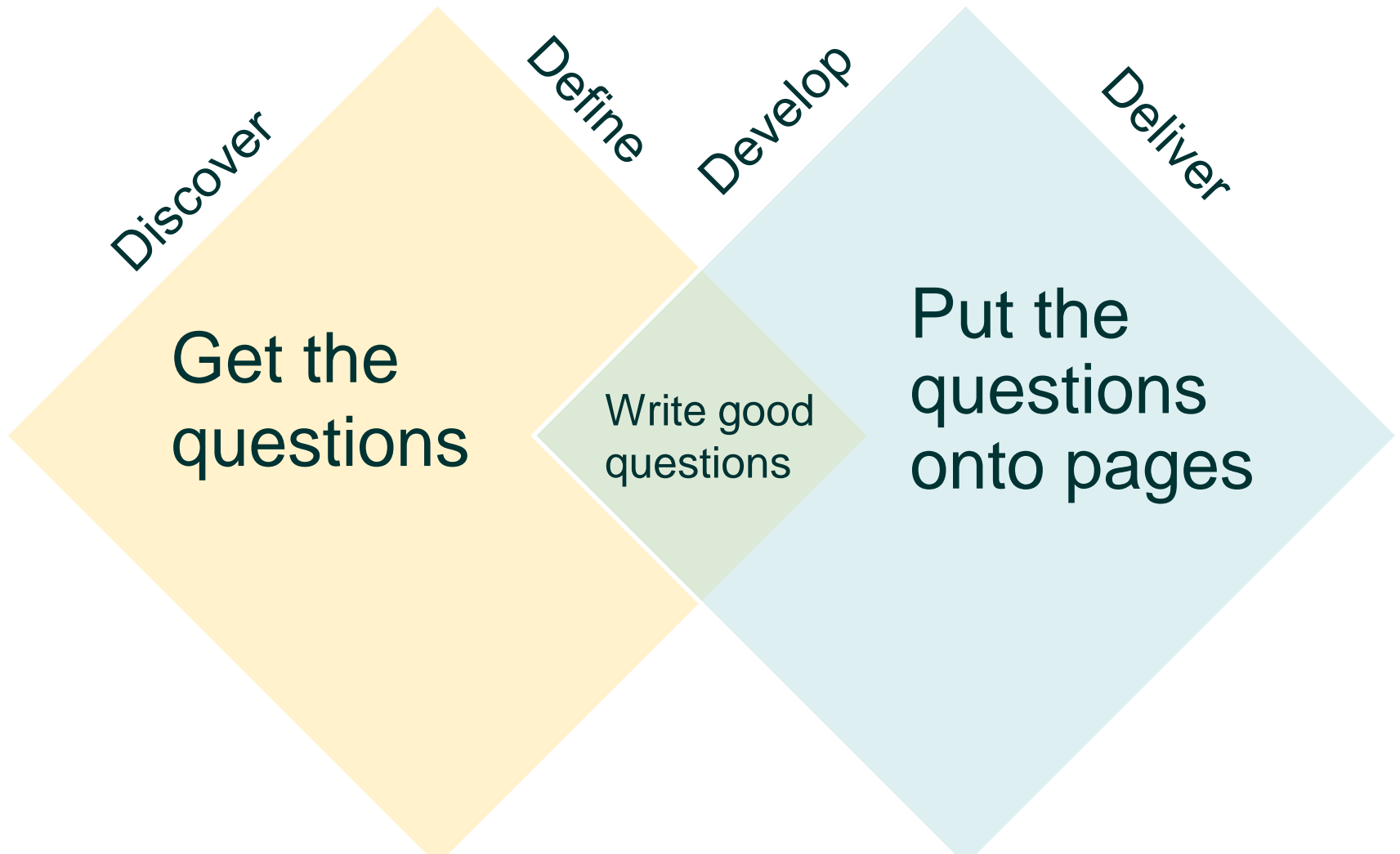
Matt Edgar suggested a design double-diamond



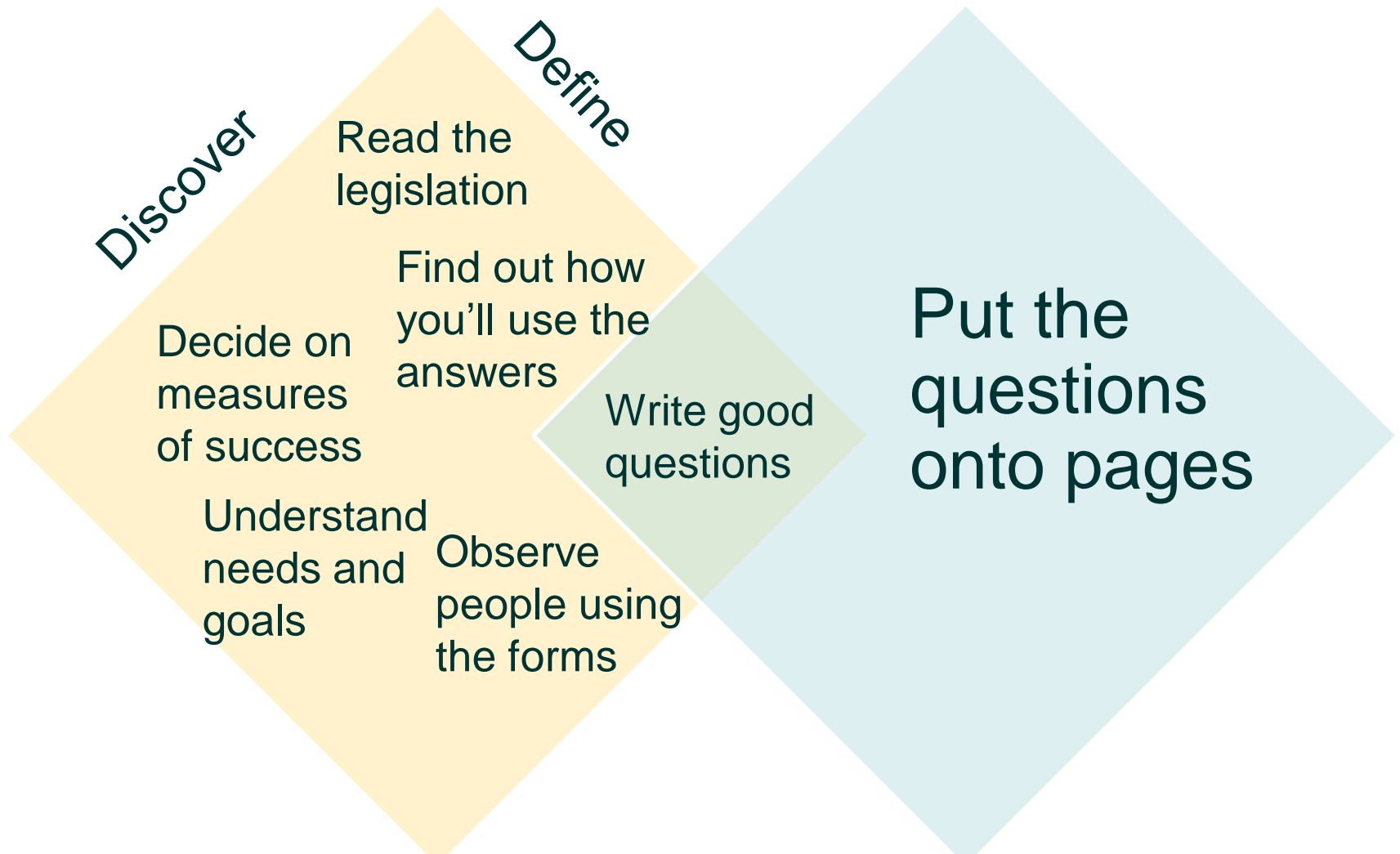
Our simple process as a double diamond



The designers had a group
'write good questions' in the middle



‘Discover/define’ focuses on whether you need a form and why



“Get the questions” might be a linear process

Read the legislation

Decide on measures of success

Understand needs and goals

Observe people using the forms

Find out how you'll use the answers

Write good questions

But it's more likely to be successful when you iterate

Read the legislation

Decide on measures of success



Understand needs and goals

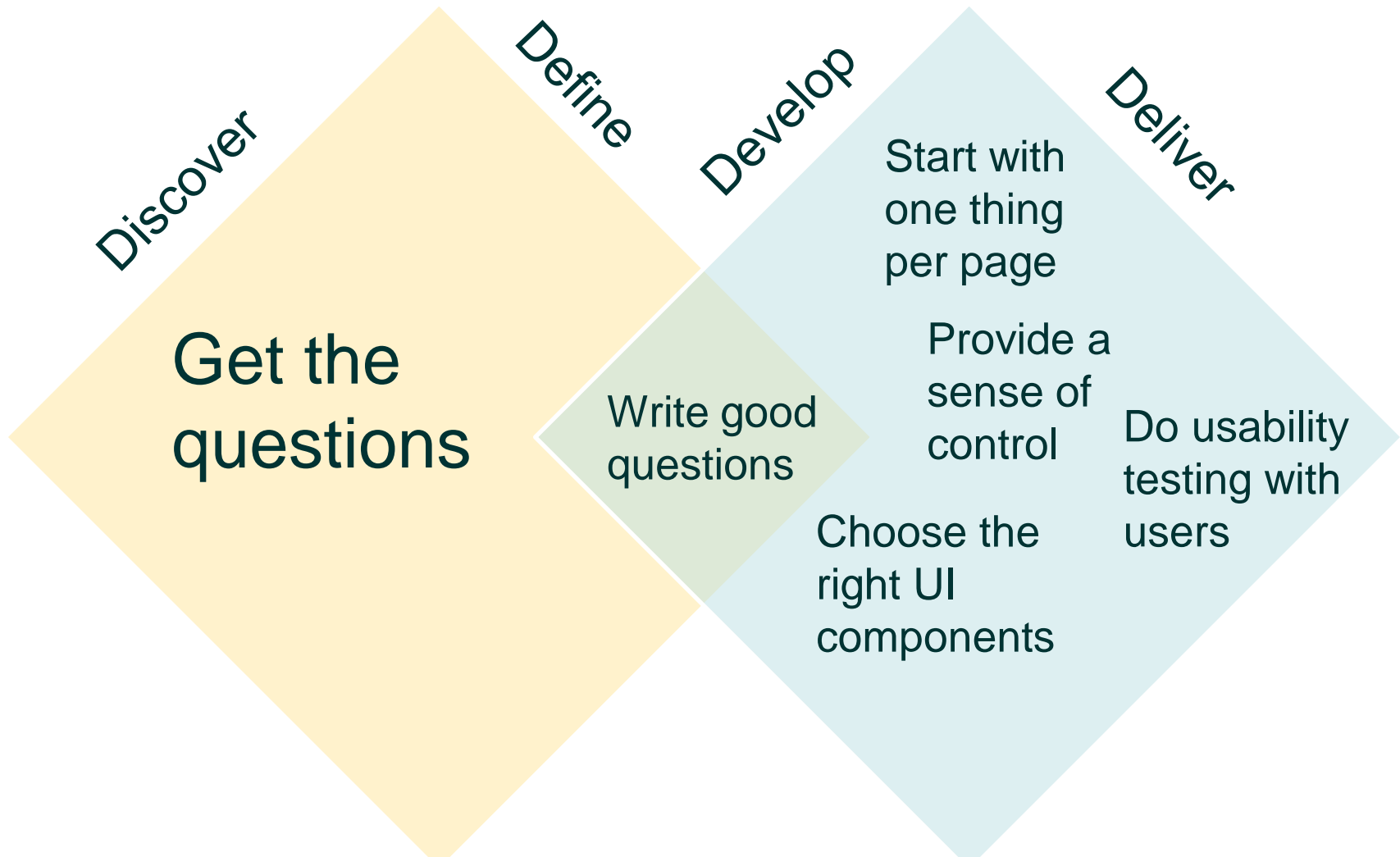
Observe people using the forms

Find out how you'll use the answers

Write good questions



‘Develop/deliver’ focuses on turning questions into a good user experience



“Put the questions on the page” definitely has to be an iterative process

Start with one thing per page

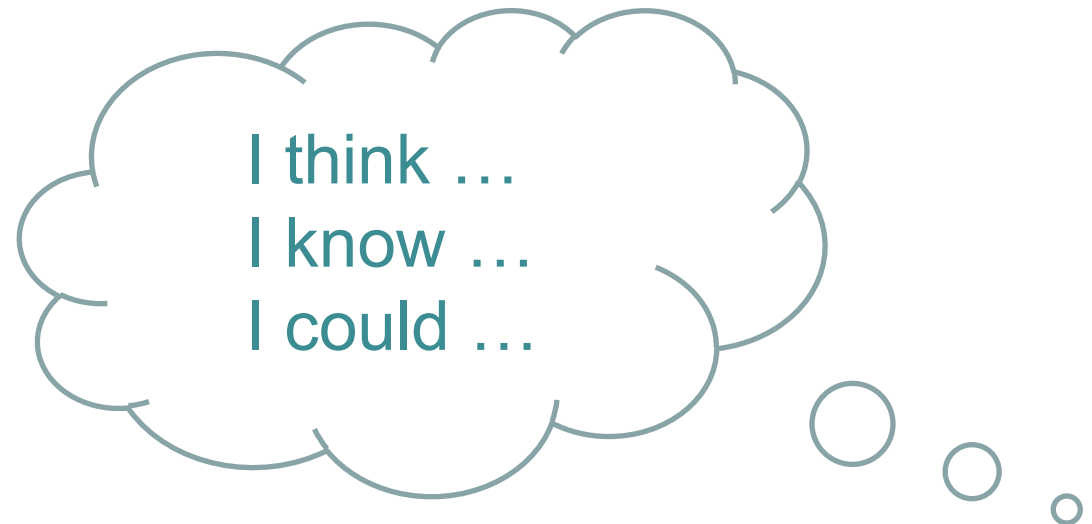


Write good questions
Provide a sense of control
Choose the right UI component
Do usability testing



I'm asking you to contribute

- Do you have ideas for topics?
- Do you have examples or case studies of improved forms and how they were improved?
- Would you like to write a topic, or know a good write-up?



Here's how to contribute

- Stay with us for some extra (optional) discussion right now
- Join the NHS Digital service manual Slack
 - <http://bit.ly/2OS3MdG>
 - join the #forms channel
 - comment as you wish
- If you don't like Slack or aren't allowed to use it,
 - Email me: caroline.jarrett@effortmark.co.uk
 - Contact me on Twitter: @cjforms
- Thank you