Creating truly accessible forms

SDinGOV Virtual 2024

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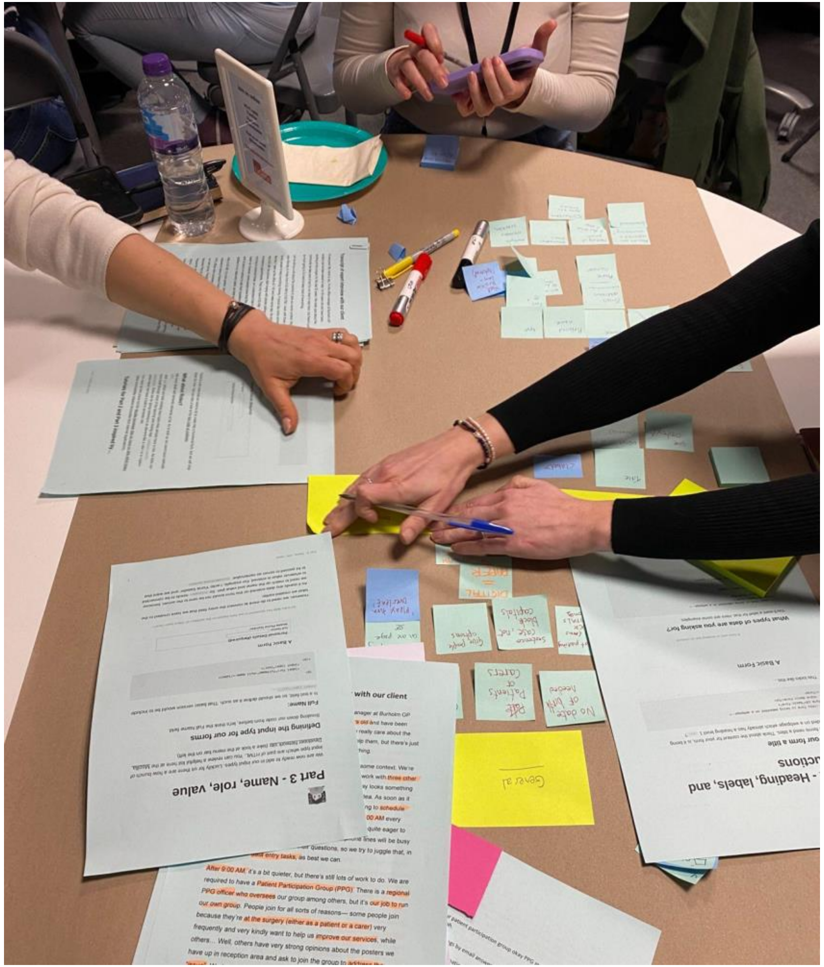
Ladies that UX Brighton ran a great in-person event

We'd like to thank everyone involved in
preparing and running that event,
the inspiration for this shorter workshop.

Blog post about the in-person event

Original workshop resources on Notion
(Creative Commons licensed).

Find our more about Ladies that UX Brighton



We are Caroline, Kiki, and Fiona

Caroline Jarrett
LinkedIn

Bukola Jolugbo (Kiki)
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Fiona MacNeill
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Find the slides online

https://bit.ly/SDGforms

Agenda

Introductions

Challenge 1: Use the Web Content Accessibility Guidelines

Challenge 2: Use the GOV.UK design system

Challenge 3: Think about how we use phones

Challenge 4: Make a question protocol

Challenge 5: Think about types of disability

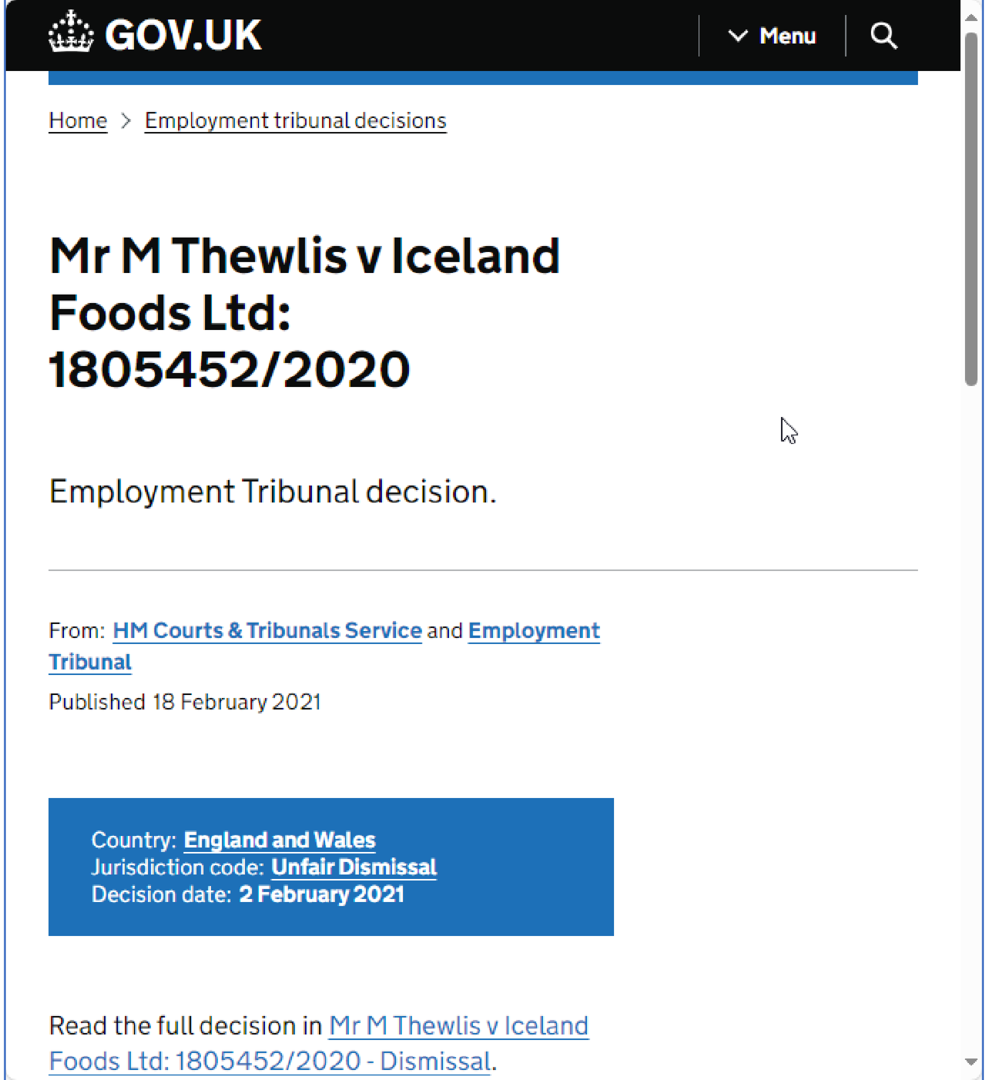
Challenge 6: Make a prototype

Wrap up

Is this a form?

GOV.UK/random

Mr M Thewlis v Iceland Foods Ltd: 1805452/2020 - GOV.UK (www.gov.uk)



Home > Employment tribunal decisions

Mr M Thewlis v Iceland Foods Ltd: 1805452/2020

Employment Tribunal decision.

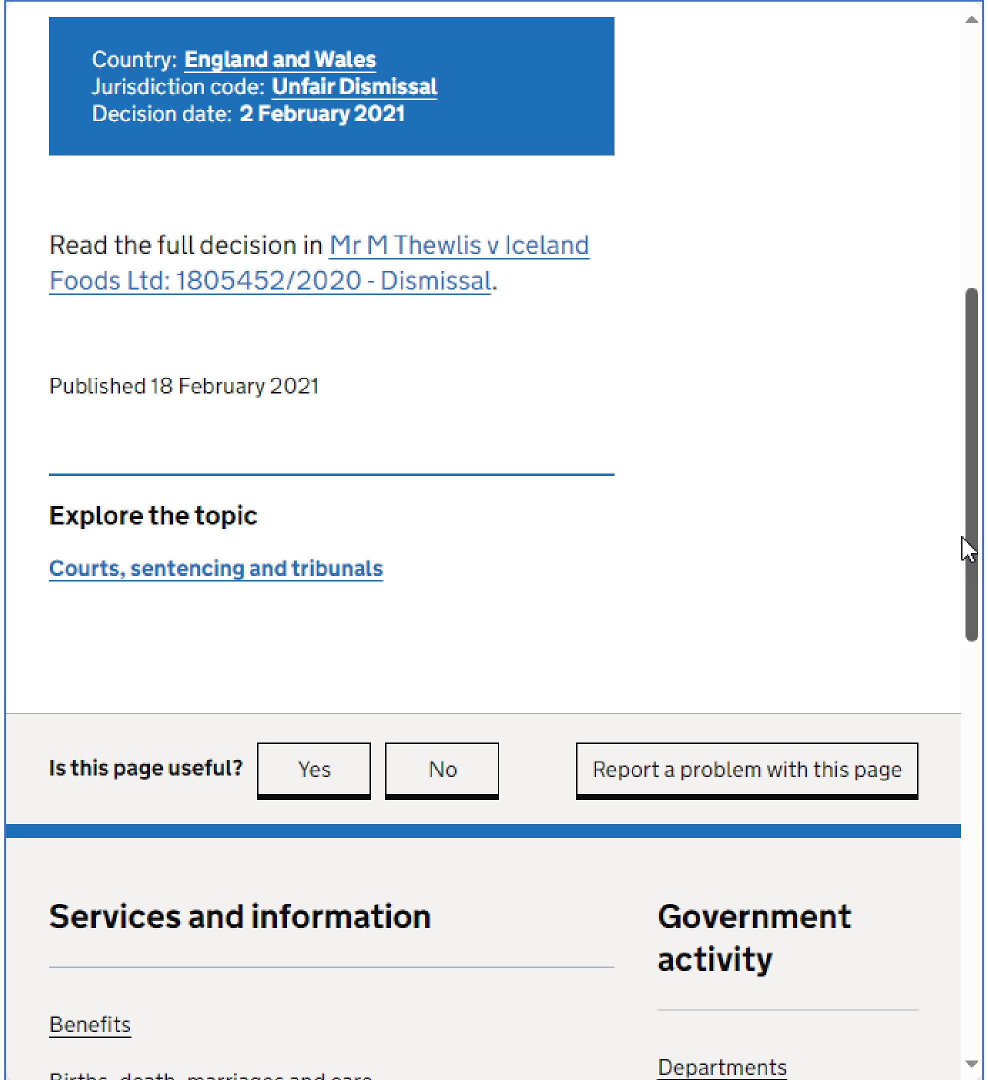
From: HM Courts & Tribunals Service and Employment Tribunal

Published 18 February 2021

Country: England and Wales
Jurisdiction code: Unfair Dismissal
Decision date: 2 February 2021

Read the full decision in Mr M Thewlis v Iceland Foods Ltd: 1805452/2020 - Dismissal.

Is this a form?



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Published 18 February 2021

Explore the topic

Courts, sentencing and tribunals

Is this page useful? Yes No Report a problem with this page

Services and information

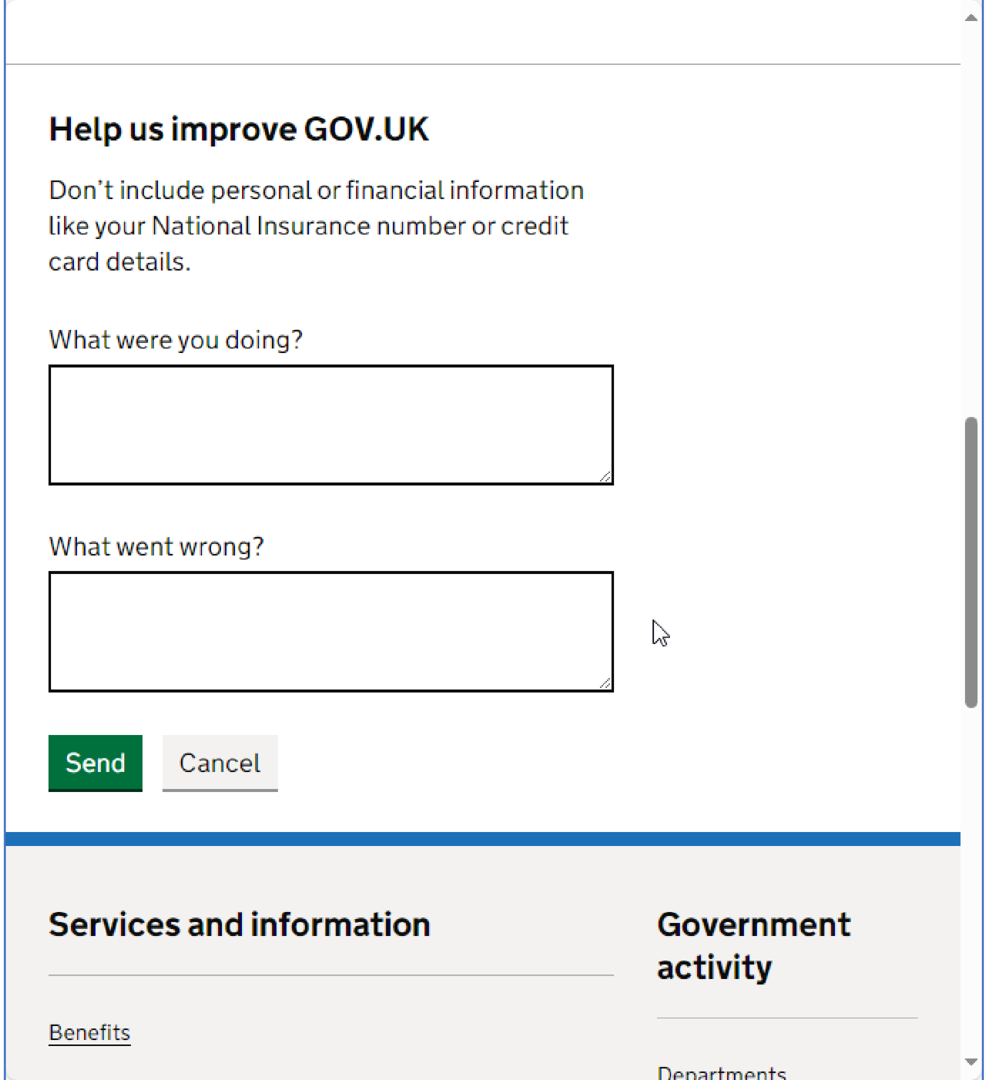
Benefits

Births, death, marriages and care

Government activity

Departments

Is this a form?



Help us improve GOV.UK

Don’t include personal or financial information like your National Insurance number or credit card details.

What were you doing?

What went wrong?

Services and information

Benefits

Government activity

Departments

We know a form when we see it

Looks like a form and works like a form

Asks questions and expects answers

Allows someone to achieve a goal

A good form needs a lot of accessibility

Interaction design

Content design

Service design

Takeaway

A good form is easy to:

- read and use
- understand and answer
- get it done and move on

Today’s focus is one specific question

Scenario
You have been asked to develop a digital version of a paper-based form. One of the form fields is ‘phone number’ - today we’ll focus on this field in our design backlog.

We’ll think about

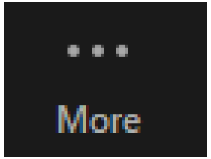
“What’s the best way to ask for a phone number?”

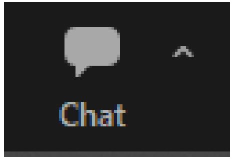
What could possibly go wrong?

This is a workshop with some discussion in chat

Let’s practice saying hi to each other in the chat

1 minute

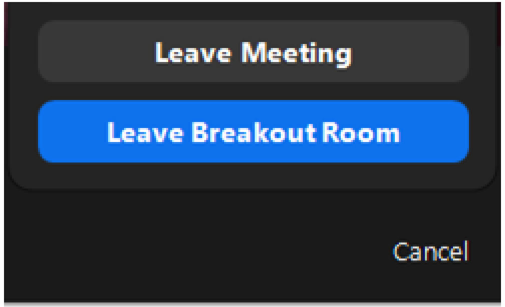




We’ll mostly work in breakout rooms

Let’s practice getting into our breakout rooms, just to say hi

2 minutes



Review:

Did we all make it there and back?

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Challenge 1:
Use the Web Content Accessibility Guidelines

Let’s try to get some help from WCAG for
“the best way to ask for a phone number”

Have a look at
[Forms Tutorial | Web Accessibility Initiative (WAI) | W3C]

Compare notes

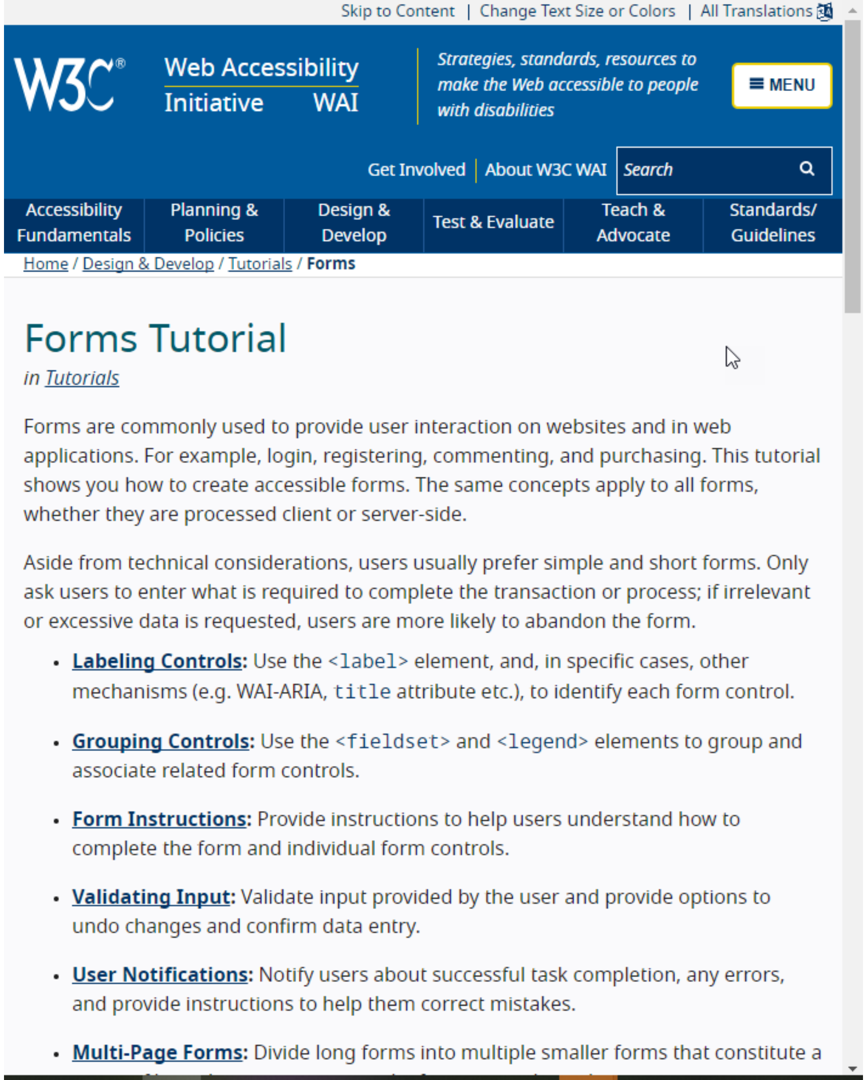
5 minutes

Review:

Did the Web Accessibility Content Guidelines help us with the best way to ask for a phone number?

This tutorial is mostly about interaction design, with a bit of content design

Forms Tutorial | Web Accessibility Initiative (WAI) | W3C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Forms Tutorial

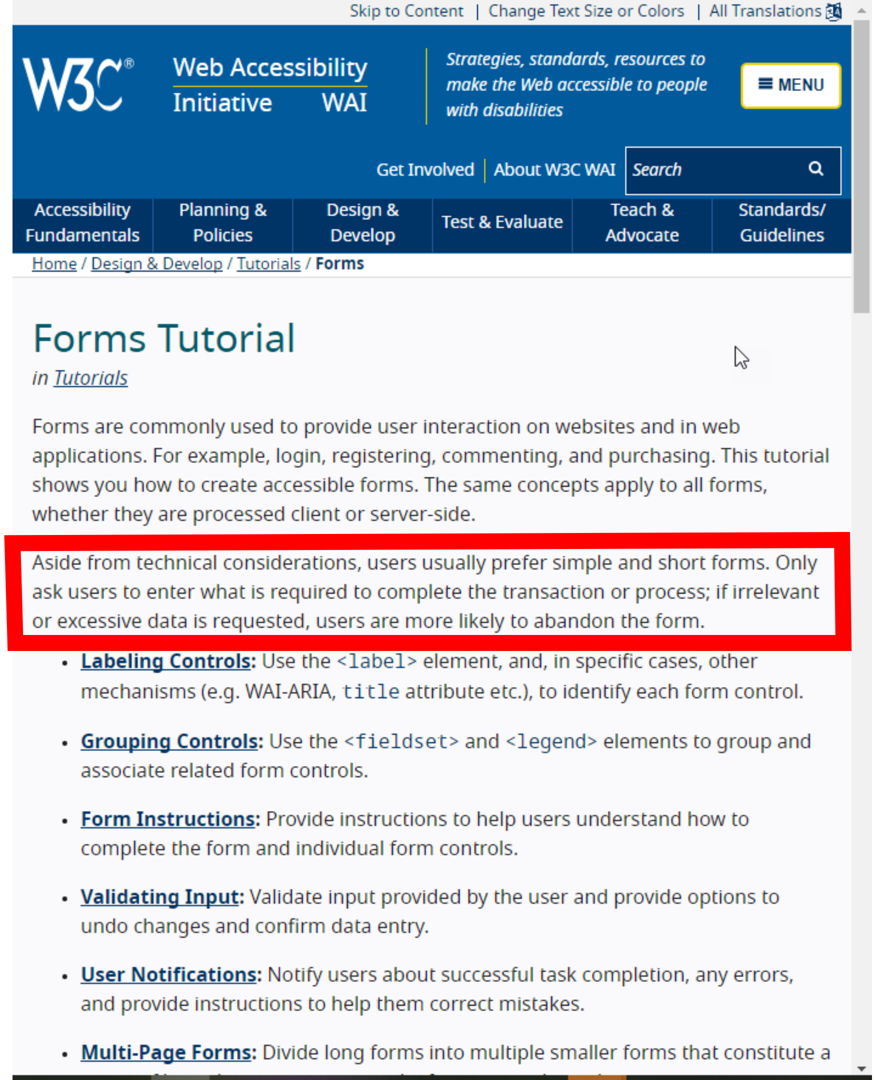
in Tutorials

Forms are commonly used to provide user interaction on websites and in web applications. For example, login, registering, commenting, and purchasing. This tutorial shows you how to create accessible forms. The same concepts apply to all forms, whether they are processed client or server-side.

Aside from technical considerations, users usually prefer simple and short forms. Only ask users to enter what is required to complete the transaction or process; if irrelevant or excessive data is requested, users are more likely to abandon the form.

- **Labeling Controls:** Use the `<label>` element, and, in specific cases, other mechanisms (e.g. WAI-ARIA, `title` attribute etc.), to identify each form control.
- **Grouping Controls:** Use the `<fieldset>` and `<legend>` elements to group and associate related form controls.
- **Form Instructions:** Provide instructions to help users understand how to complete the form and individual form controls.
- **Validating Input:** Validate input provided by the user and provide options to undo changes and confirm data entry.
- **User Notifications:** Notify users about successful task completion, any errors, and provide instructions to help them correct mistakes.
- **Multi-Page Forms:** Divide long forms into multiple smaller forms that constitute a

There is a bit of service design there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W3C®
Web Accessibility Initiative WAI
Strategies, standards, resources to make the Web accessible to people with disabilities
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Challenge 2:
Use the GOV.UK design system

We’re looking for the best way to ask for a phone number

Try
GOV.UK Design System (design-system.service.gov.uk)

Compare notes

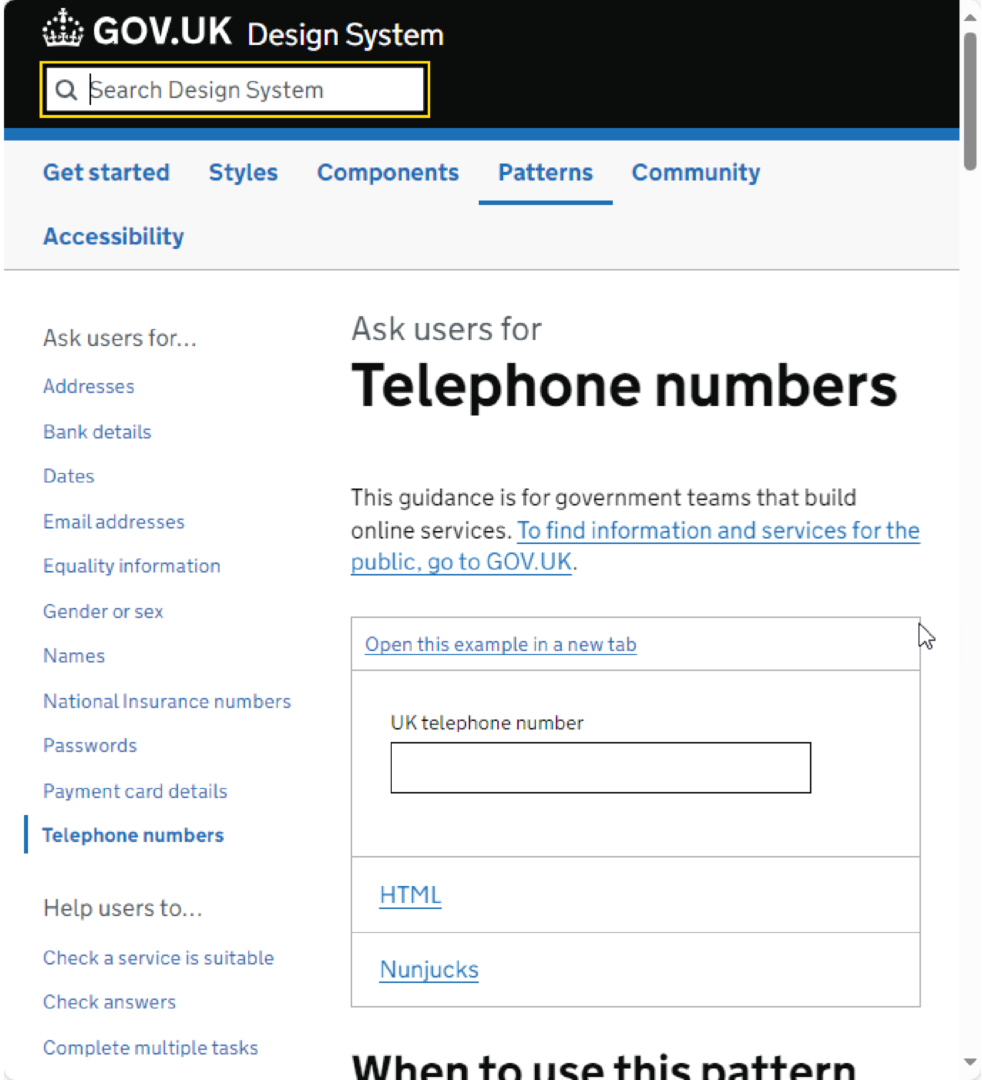
5 minutes

Review:

Did GOV.UK Design system help us with the best way to ask for a phone number?

This pattern is specifically about telephone numbers

[Telephone numbers – GOV.UK Design System (design-system.service.gov.uk)]



Ask users for...

- Addresses
- Bank details
- Dates
- Email addresses
- Equality information
- Gender or sex
- Names
- National Insurance numbers
- Passwords
- Payment card details
- Telephone numbers

Help users to...

- Check a service is suitable
- Check answers
- Complete multiple tasks

Ask users for

Telephone numbers

This guidance is for government teams that build online services. To find information and services for the public, go to GOV.UK.

Open this example in a new tab

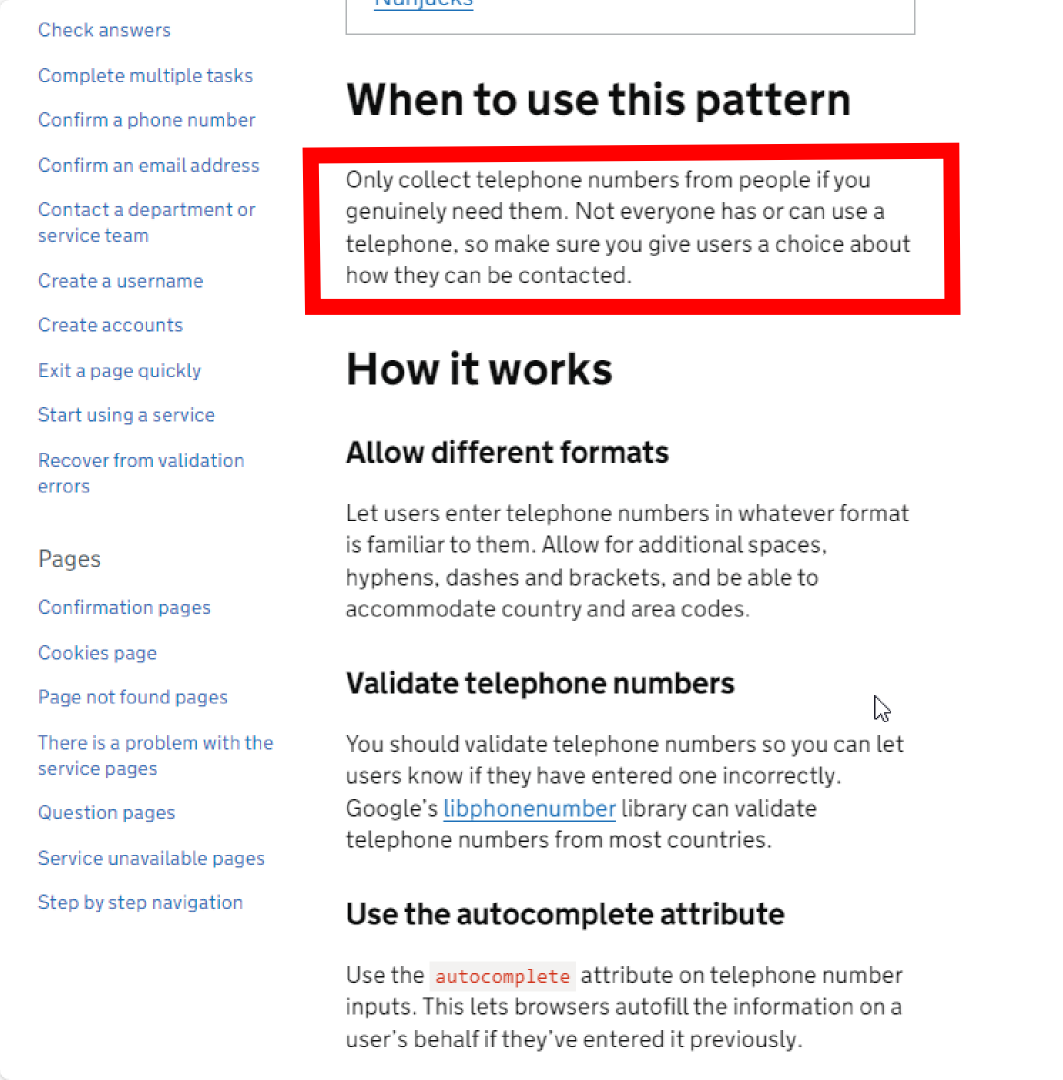
UK telephone number

HTML

Nunjucks

When to use this pattern

We have to design “give users a choice about how they can be contacted”



When to use this pattern

Only collect telephone numbers from people if you genuinely need them. Not everyone has or can use a telephone, so make sure you give users a choice about how they can be contacted.

How it works

Allow different formats

Let users enter telephone numbers in whatever format is familiar to them. Allow for additional spaces, hyphens, dashes and brackets, and be able to accommodate country and area codes.

Validate telephone numbers

You should validate telephone numbers so you can let users know if they have entered one incorrectly. Google’s libphonenumber library can validate telephone numbers from most countries.

Use the autocomplete attribute

Use the `autocomplete` attribute on telephone number inputs. This lets browsers autofill the information on a user’s behalf if they’ve entered it previously.

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What do we have to design?

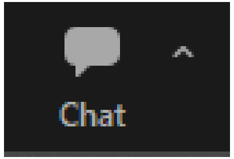
We have to design:

> “give users a choice about how they can be contacted”

Is this the only way that organisations use the phone numbers that they collect?

Challenge 3:
Think about how we use phones

- Have a look at your phone
  - Is it a landline or mobile?
  - Is there only one or do you have several?
- Consider calls received and messages
  - What did you get and why?
  - How did you react?
- Think about someone, maybe in your family, who has a different experience to you. Any extra thoughts?



Review:

Is “your phone” a landline or mobile?
Any thoughts about messages and calls you received?
Any thoughts about different answers for someone else?

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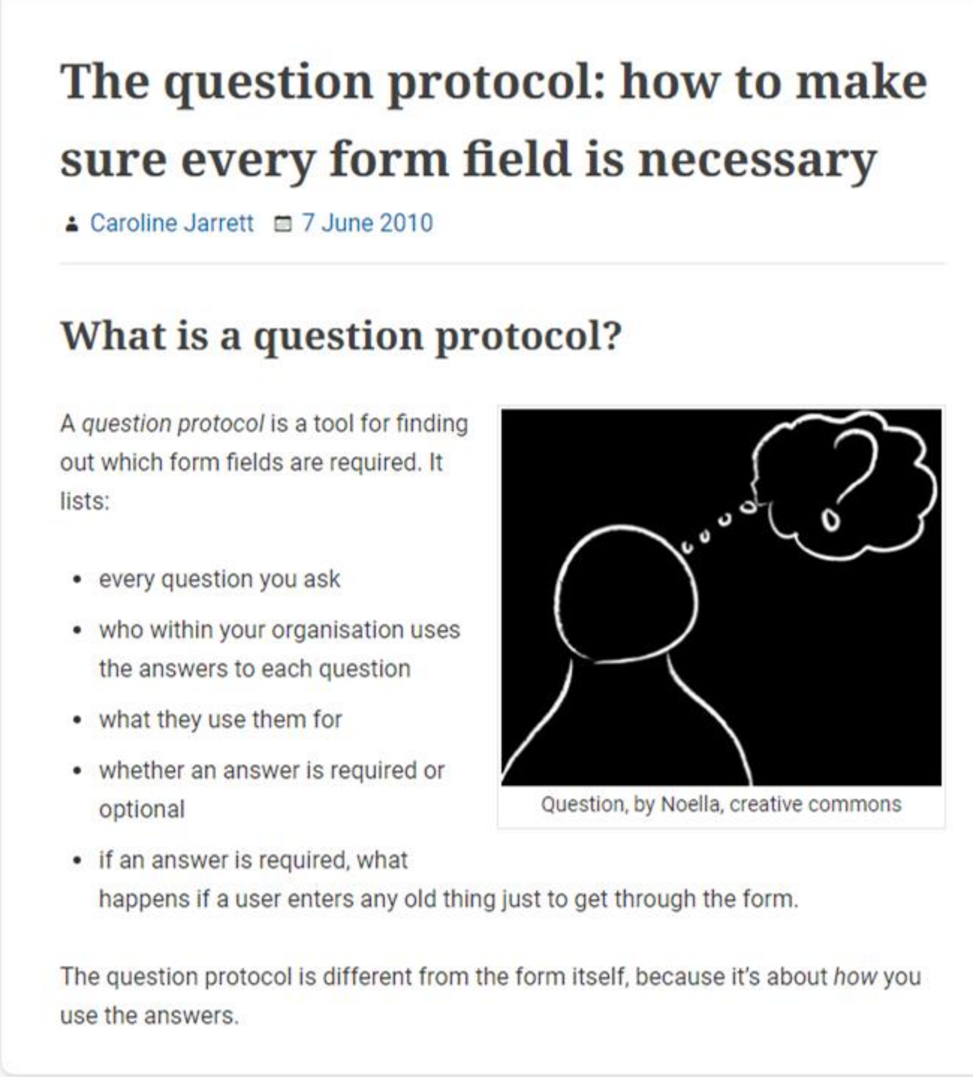
A question protocol is a list of all the questions

The question protocol: how to make sure every form field is necessary - Effortmark



The question protocol: how to make sure every form field is necessary

Caroline Jarrett 7 June 2010

What is a question protocol?

A *question protocol* is a tool for finding out which form fields are required. It lists:

- every question you ask
- who within your organisation uses the answers to each question
- what they use them for
- whether an answer is required or optional
- if an answer is required, what happens if a user enters any old thing just to get through the form.

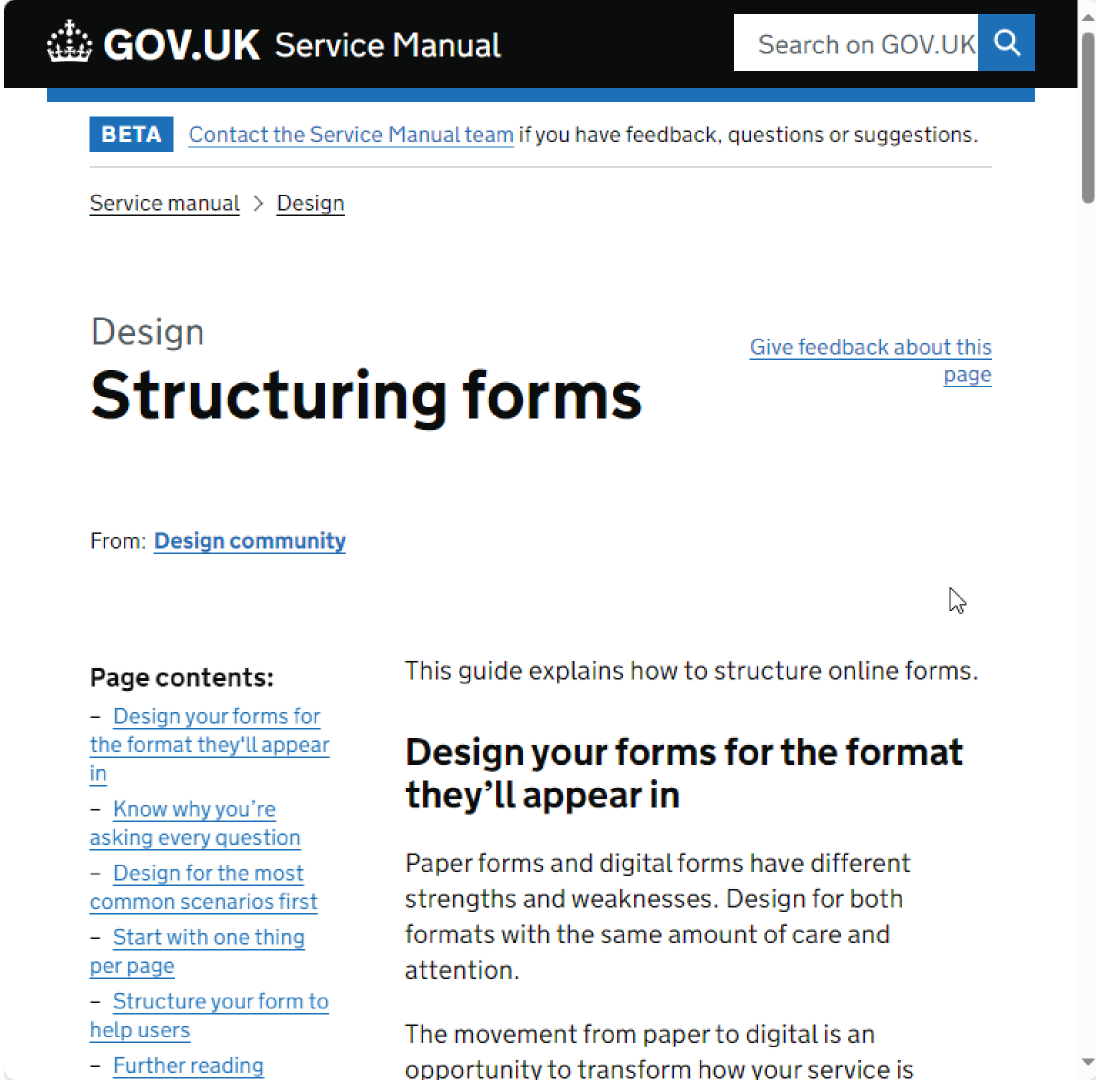
Question, by Noella, creative commons

The question protocol is different from the form itself, because it's about *how* you use the answers.

Surprise!

Question protocols are in the GOV.UK Service Manual

[Structuring forms - Service Manual - GOV.UK (www.gov.uk)](https://www.gov.uk)



BETA Contact the Service Manual team if you have feedback, questions or suggestions.

Service manual › Design

Design

Structuring forms

Give feedback about this page

From: **Design community**

Page contents:

This guide explains how to structure online forms.

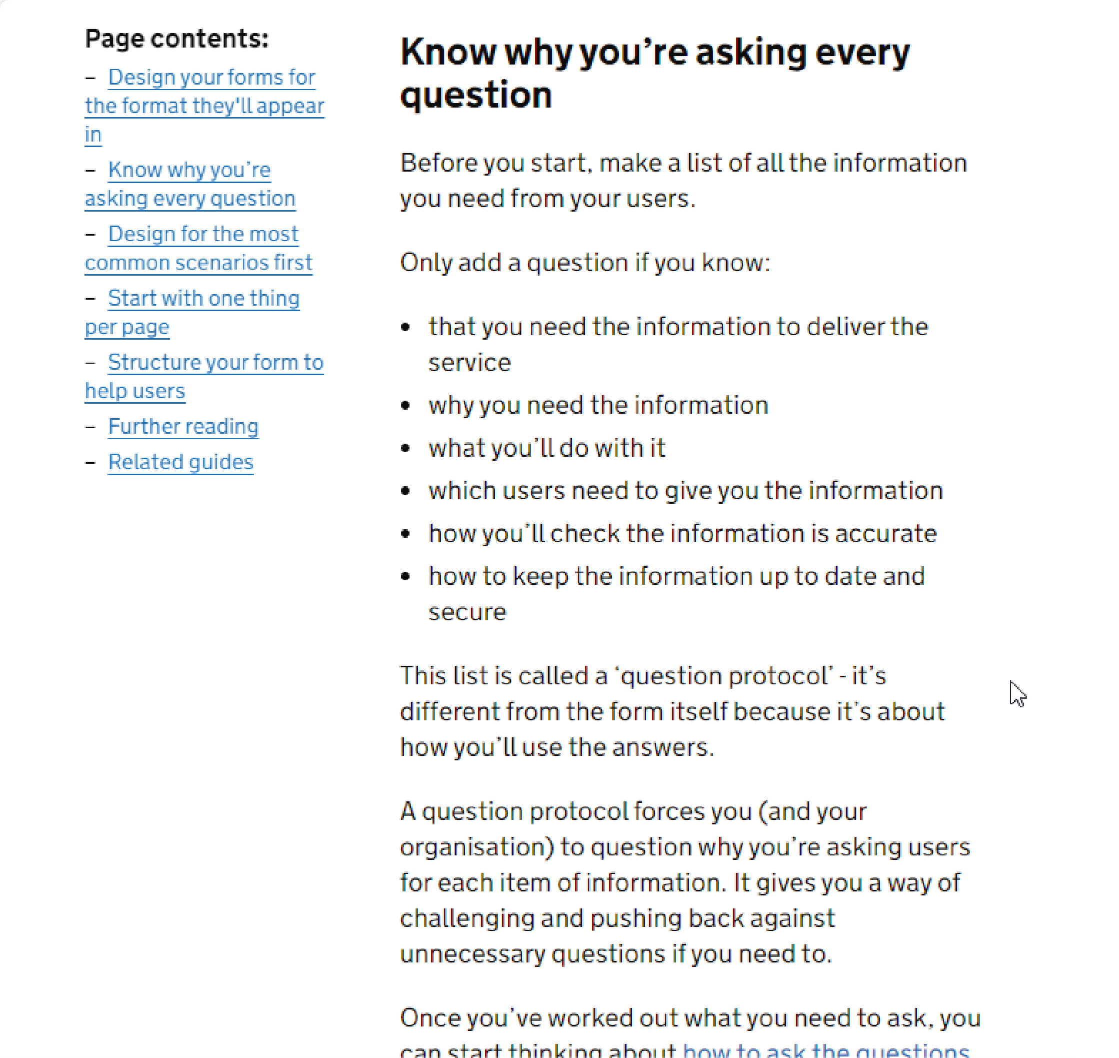
Design your forms for the format they’ll appear in

Paper forms and digital forms have different strengths and weaknesses. Design for both formats with the same amount of care and attention.

The movement from paper to digital is an opportunity to transform how your service is

Here they are

[Structuring forms - Service Manual - GOV.UK (www.gov.uk)]



Know why you're asking every question

Before you start, make a list of all the information you need from your users.

Only add a question if you know:

- that you need the information to deliver the service
- why you need the information
- what you'll do with it
- which users need to give you the information
- how you'll check the information is accurate
- how to keep the information up to date and secure

This list is called a 'question protocol' - it's different from the form itself because it's about how you'll use the answers.

A question protocol forces you (and your organisation) to question why you're asking users for each item of information. It gives you a way of challenging and pushing back against unnecessary questions if you need to.

Once you've worked out what you need to ask, you can start thinking about how to ask the questions

A question protocol keeps track of each question

Only add a question if you know:

- that you need the information to deliver the service
- why you need the information
- what you'll do with it
- which users need to give you the information
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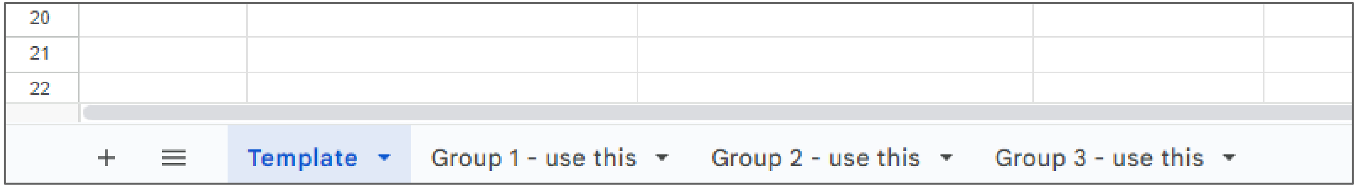
Structuring forms - Service Manual - GOV.UK (www.gov.uk)

An example of an entry in my question protocol

Column in the question protocol	Example for a newsletter sign-up form
Answer we need to get (data)	Name
Why is it needed?	To be able to address the user To identify the individual user
How will it be used?	Hi, Caroline!
Level of importance (must have, nice to have)	Nice to have
What happens if you get the wrong answer or no answer to this question?	May have a strange interaction with the user
(optional: include choice of interaction design)	Open box (text area) Split fields (three boxes)

Challenge 4:
Make question protocol entry

There’s a question protocol with two entries:
https://bit.ly/SDGqp - there is a tab for your group



Try creating an entry for our challenge: a phone number
10 minutes

Review:

How was the question protocol?

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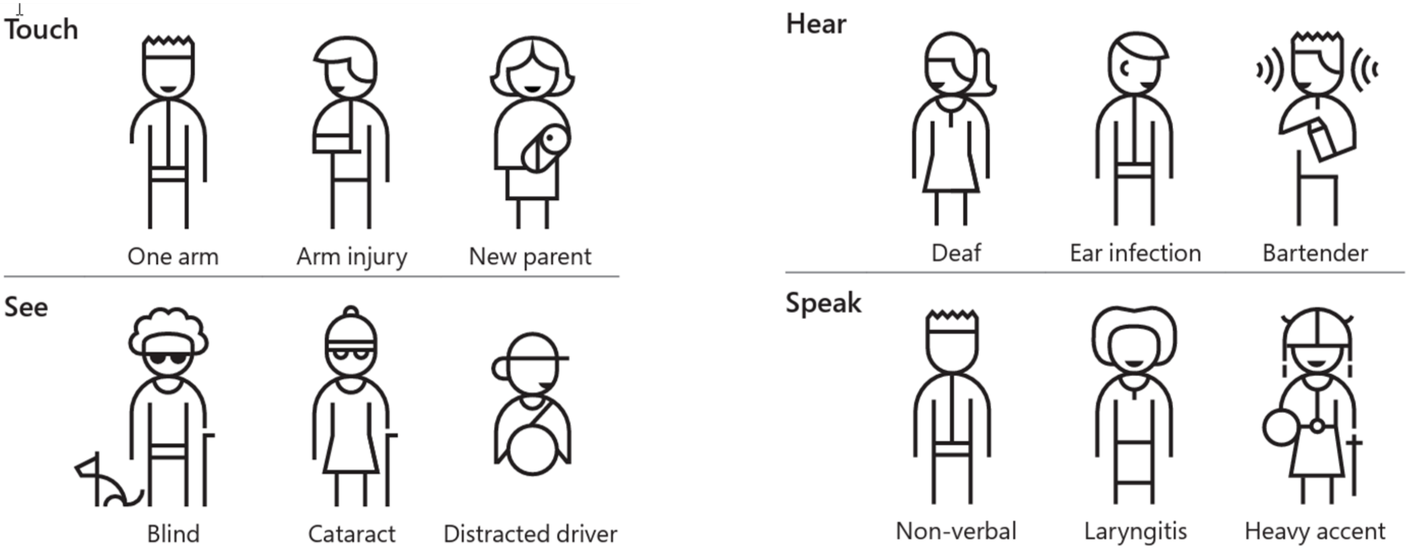
Challenge 5:
Think about types of disability



Inclusive101Guidebook.pdf (microsoft.design)

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Challenge 6:
Make a prototype

Design a truly accessible question

Your question must:

- Obtain a phone number
- Allow for some sort of choice

15 minutes

Review:

Show and tell on the prototypes

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It’s worth putting extra effort into ‘easy’ questions

Question	**Mean abandon rate**
Name	6%
Email	6%
Password	11%
Phone	6%
Postcode	5%
Address	5%

https://www.zuko.io/blog/which-form-fields-cause-the-biggest-ux-problems

Users want to know why you want to know

“Users hate giving you their phone number - It’s a sad truth but users are very suspicious of you asking for their number. They fear being spammed by sales calls so would rather drop out of the process than hand it over …

If you really must ask then explain why you need it. A simple line saying that you need their number in case there are any issues with delivery will do wonders for the completion rate on your phone field.”

https://www.zuko.io/blog/which-form-fields-cause-the-biggest-ux-problems

Forgiving interaction design really matters, too

“Format confusion - More than any field, phone numbers have a cornucopia of ways you can potentially enter the information. Do you add a ‘+’? The country code? How about spaces or dashes? <HEAD EXPLODES EMOJI>”

https://www.zuko.io/blog/which-form-fields-cause-the-biggest-ux-problems

Please help dyscalculics

1. If you already have a phone number for us, don’t ask again
2. Let us copy the phone number into the form
3. Allow for typical characters such as plus, dash, and space
4. Be very specific in the error message
5. Give us extra time

Fill in the information you have (accessiblenumbers.com)

Improve Validation Errors with Adaptive Messages (98% Don’t) – Articles – Baymard Institute

A good form needs a lot of accessibility

Interaction design

Content design

Service design

Caroline Jarrett

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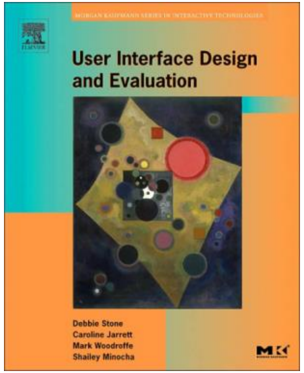
caroline.jarrett@effortmark.co.uk

www.effortmark.co.uk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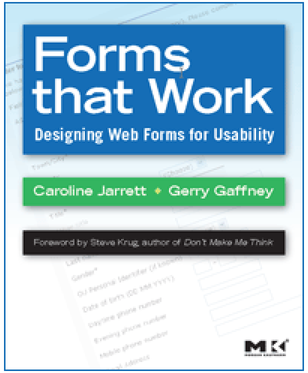
Forms that Work
Designing Web Forms for Usability
Caroline Jarrett • Gerry Gaffney
Foreword by Steve Krug, author of Don't Make Me Think
MK