Getting forms right

How better words lead to better results
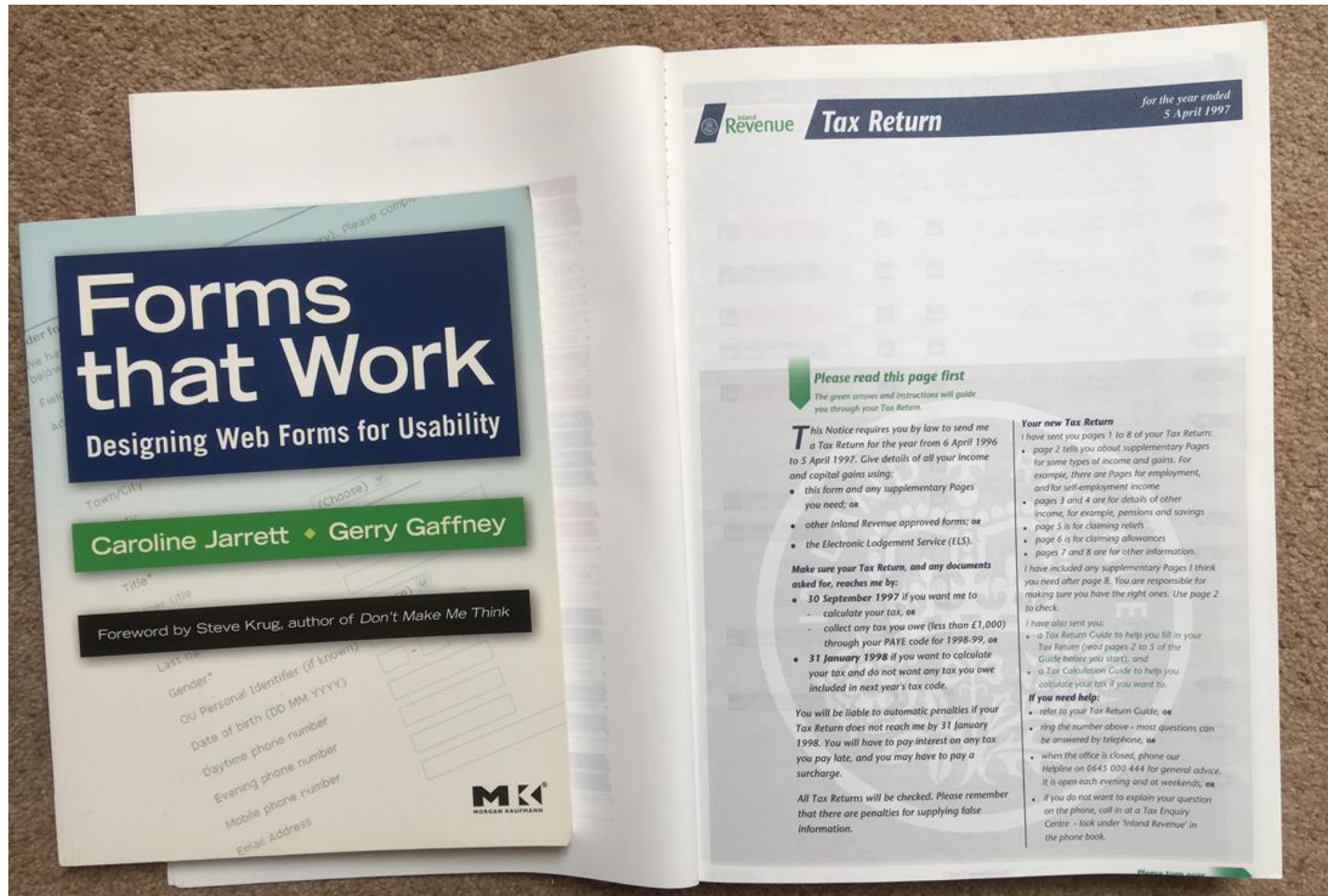
Caroline Jarrett

Caroline Jarrett | LinkedIn

@cjforms.bsky.social

Content Club

I've worked on forms for over 30 years

Caroline Jarrett   Effortmark.co.uk   @cjforms   (CC) BY SA-4.0

Image credit: Caroline Jarrett

Tax stuff arrives in brown envelopes

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

We chose a selection of topics in forms

- Forms need a lot of design

- Test a form by filling it in (mostly)

- Forms and surveys are similar

- Forms can be complex in many ways

- Bilingual forms need to stick to one language at a time

With, I hope, lots of time for questions and discussion

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Forms need a lot of design

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Before we look at any form, decide on a person

Write a 'once upon a time' story, filling in these blanks

Today _____ (name of a person)

decides to _____ (do a task)

because _____ (reason for the task)

Optional: add an adjective about how they feel about it

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Today we are all going to be Pat

Today   Pat

decides to   find out how to pay a parking ticket in Edinburgh

because   the actual ticket has gone missing

Optional: what adjective would you guess applies to Pat?

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Now let's try the task

- Follow along as Pat tries to pay
- Keep a note of which page(s) on the website are the form

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Is this (page 1) a form?

+pay ediburgh parking ticket

SEARCH   COPILOT   IMAGES   VIDEOS

About 27,500 results

The City of Edinburgh Council
https://www.edinburgh.gov.uk/parking-tickets/pay-parking-tickets-b... ▾

Pay parking tickets and bus lane charge notices - The Ci

We can't accept payment if your parking ticket or charge notice has be
Sheriff Officers for collection. You must contact the relevant Sheriff Of
payment options. If your case is with Scott and Co phone them on 033
If the debt is with Walker Love please phone them on 0141 212 ... See

Online

The simplest way to pay is online. You can also view any photos for parking ti
video for bus lane notices. You will be able to view them before you pay. ... Se

By Phone

You can phone our secure 24 hour service to pay by debit or credit card. We a
Mastercard, Visa, Maestro and Delta. 0131 627 0014 See more

By Post

Please take postage time into consideration when sending payments or corre
parking tickets and bus lane charge notices by post. Where possible, ... See m

Is page 2
a form?

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

Is page 3 a form?

[Pay parking tickets and bus lane charge notices – The City of Edinburgh Council](#)

Caroline Jarrett [Effortmark.co.uk](#) @cjforms [(CC) BY SA-4.0](#)

ᐳEDINBVRGH
THE CITY OF EDINBURGH COUNCIL

Home / Roads, travel and parking / Parking /
Parking tickets and bus lane notices / Pay parking tickets and bus lane charge notices

Pay parking tickets and bus lane charge notices

You should have the following details to hand:

- The parking ticket (begining ED or EH) or bus lane (begining EB) charge notice number
- Your vehicle registration
- A valid credit or debit card

Online

The simplest way to pay is online. You can also view any photos for parking tickets or a video for bus lane notices. You will be able to view them before you pay. These will be available one day later.

Pay parking tickets and bus lane charge notices

By phone

You can phone our secure 24 hour service to pay by debit or credit card. We accept Mastercard, Visa, Maestro and Delta.

27 0014

Is page 4 a form?

[Parking ticket viewer - Pay PCN Home (itsvc.co.uk)](#)

Caroline Jarrett [Effortmark.co.uk](#) @cjforms [(CC) BY SA-4.0](#)

Parking ticket viewer

Enter Penalty Charge Notice (PCN) number and vehicle registration

PCN number

Your PCN number starting with ED or EB followed by 8 digits

Registration number

Your vehicle registration number (number plate)

Search

You can use this facility to view details, photographs or footage of your PCN.

[Our accessibility statement](#)

Is page 5 a form?

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·EDINBVRGH·
THE CITY OF EDINBURGH COUNCIL

Parking ticket viewer

Enter Penalty Charge Notice (PCN) number and vehicle registration

PCN number

Your PCN number starting with ED or EB followed by 8 digits

Required Field

Registration number

Your vehicle registration number (number plate)

V   F

Search

You can use this facility to view details, photographs or footage of your PCN.

Our accessibility statement

Which page(s) were the form?

1

2

3

4

5

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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

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

I think a lot about three layers
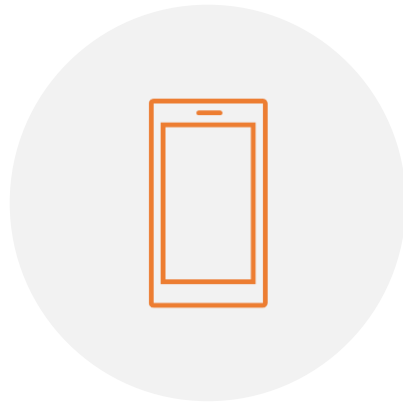
Appearance

Conversation

Relationship

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

A good form starts with user and business needs

Questions you ask

Answers you need

User needs

Business needs

Interaction design
Appearance

Content design
Conversation

Service design
Relationship

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0
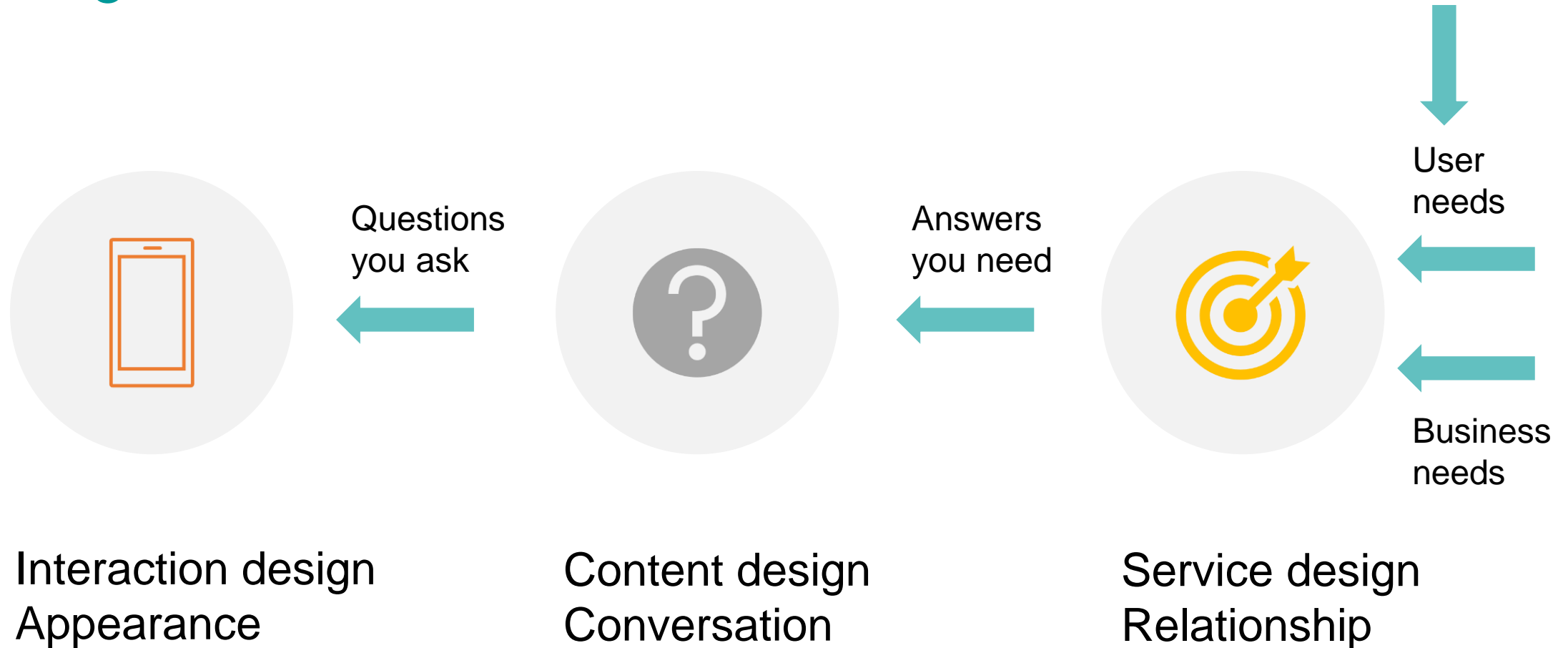
A good form needs a lot of design

Interaction design

Content design

Service design

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

Takeaway

A good form is easy to:

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

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Test a form by filling it in

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

We wrote a 'once upon a time' story to test a form

Write a 'once upon a time' story, filling in these blanks

Today _____ (name of a person)

decides to _____ (do a task)

because _____ (reason for the task)

Optional: add an adjective about how they feel about it

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It's valid to be yourself

Be realistic about representativeness

If you're filling in the form as yourself, are you likely to fill in the form?

If you're filling the form in as someone else, how well do you know that person?

Whoever you choose to be, does that person represent real users?
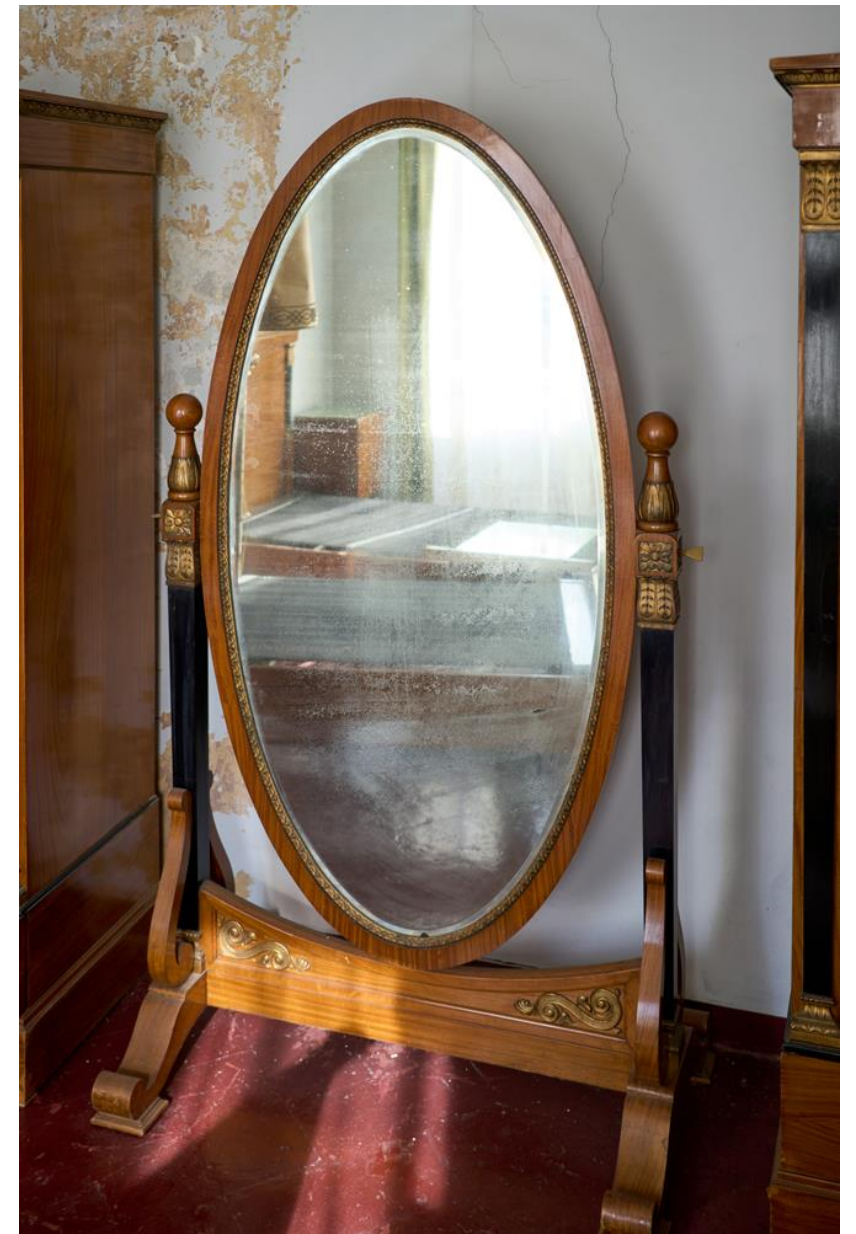
Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

Image credit: Steffen Lemmerzahl on Unsplash

Do usability testing of your form

Get someone to fill in your form
while you watch

I'M NOT SURE

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Illustration by Tasia Graham for "Surveys that work: A practical guide for designing better surveys" by Caroline Jarrett

Do cognitive testing on your questions

Where did 'I'm not sure' come from?
Was it an interaction problem?
What is this person thinking?

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Illustration by Tasia Graham for "Surveys that work: A practical guide for designing better surveys" by Caroline Jarrett
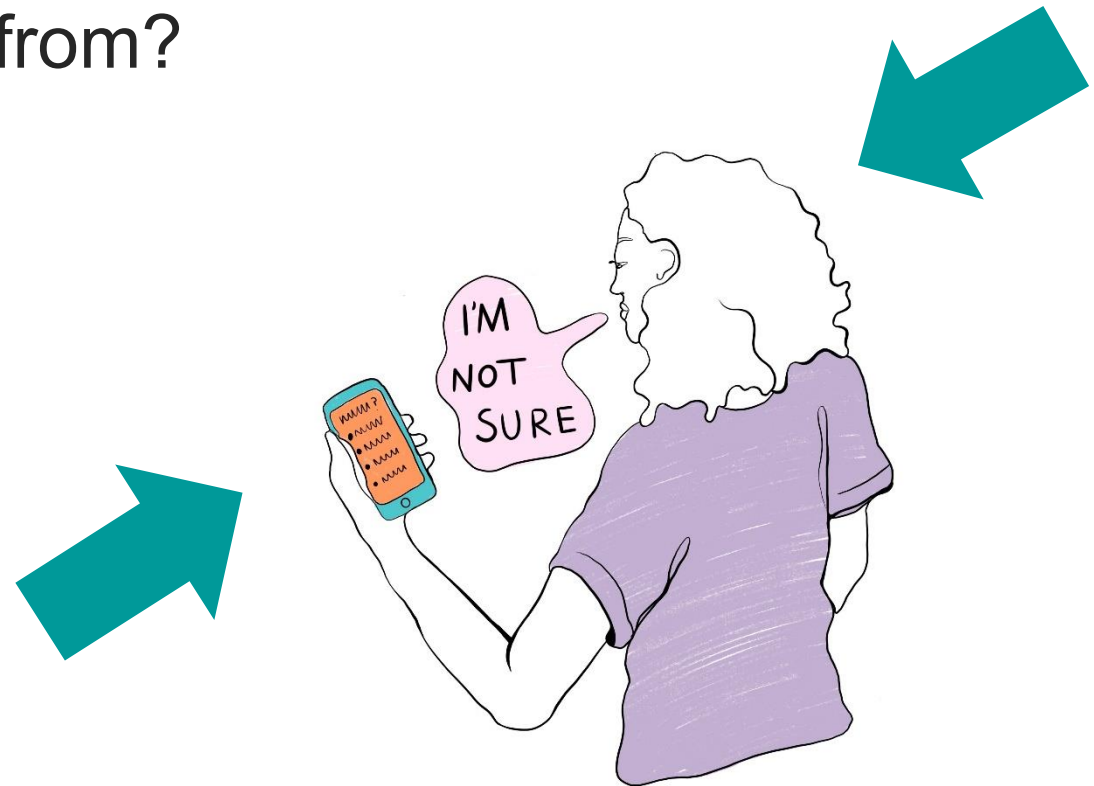
Investigate your error rates

Find out who deals with the incoming forms

Arrange to watch them do their work

Count how many forms:
- Are fine and get dealt with
- Have errors that get fixed
- Get sent back to the user

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

Understanding the costs of data capture: paper, automatic and with the internet - Effortmark
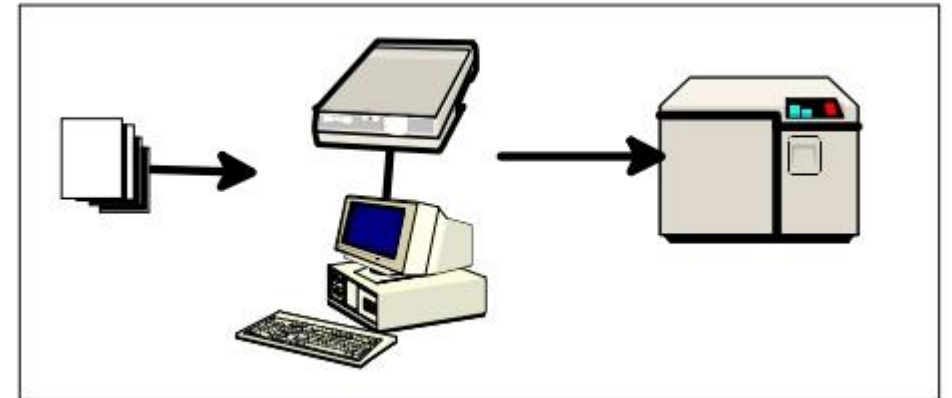
Takeaway

"It's done when
a real user has used it
for something real"
- By me

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

Forms and surveys are very similar

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We often use the words "form" and "questionnaire" interchangeably

"Don Tillman" in the book creates a *questionnaire* for The Wife Project.

He expects to reject or select a potential candidate from the submissions.

He also uses a *depression measurement questionnaire* to track his mental health.

He is aggregating the results over time.

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

The Rosie Project (penguin.co.uk)
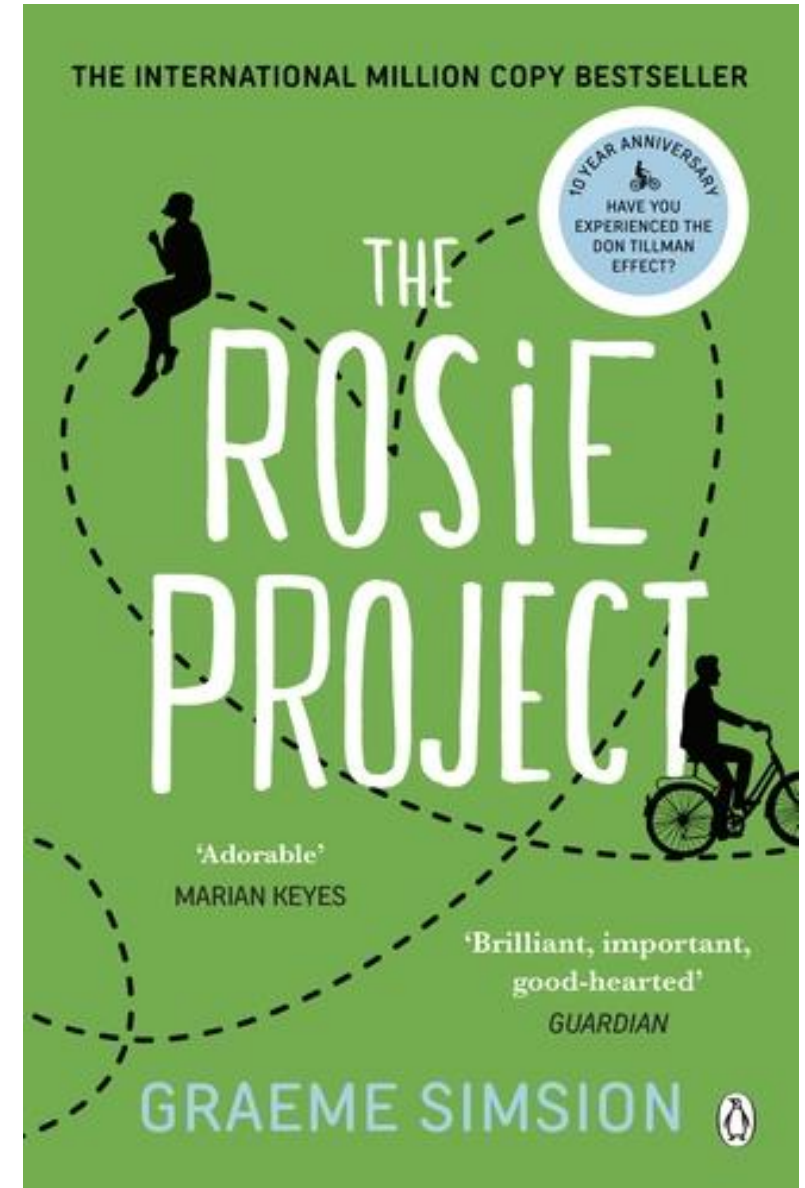
Forms are individual, surveys are aggregates

Form answers get used individually

Person A ➤ Follow-up A

Person B ➤ Follow-up B

Person C ➤ Follow-up C

Survey answers get used as an aggregate

Person A ➤

Person B ➤

Person C ➤

many others ➤

} 20% say …

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For example, we can use 'postcode' differently

Form answers get used individually

Person A → Follow-up A – We can deliver to you

Person B → Follow-up B – It costs extra for Highlands

Person C → Follow-up C – Sorry, not available

Survey answers get used as an aggregate

Person A

Person B

Person C

others

} 20% of our potential customers are outside our delivery area

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0
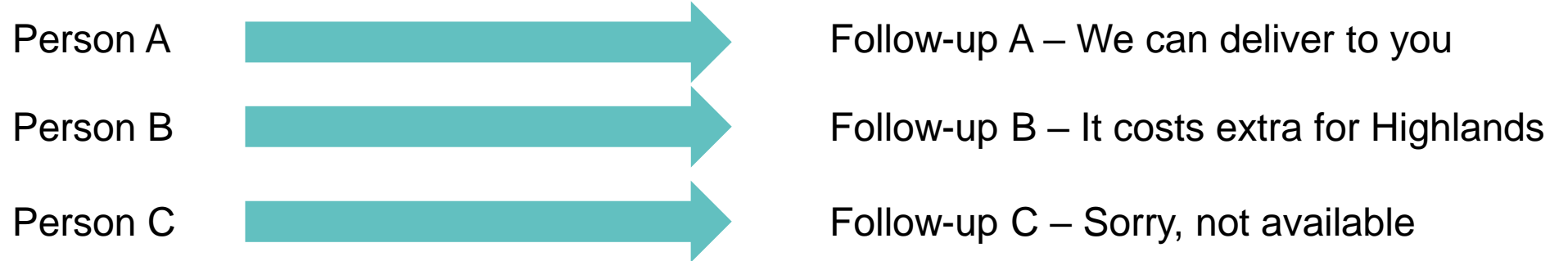
Users want to know why you want to know

"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."

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

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.

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Forms can be complex in many ways

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Much of our current forms advice is for simple forms

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https://baymard.com/blog/make-guest-checkout-prominent

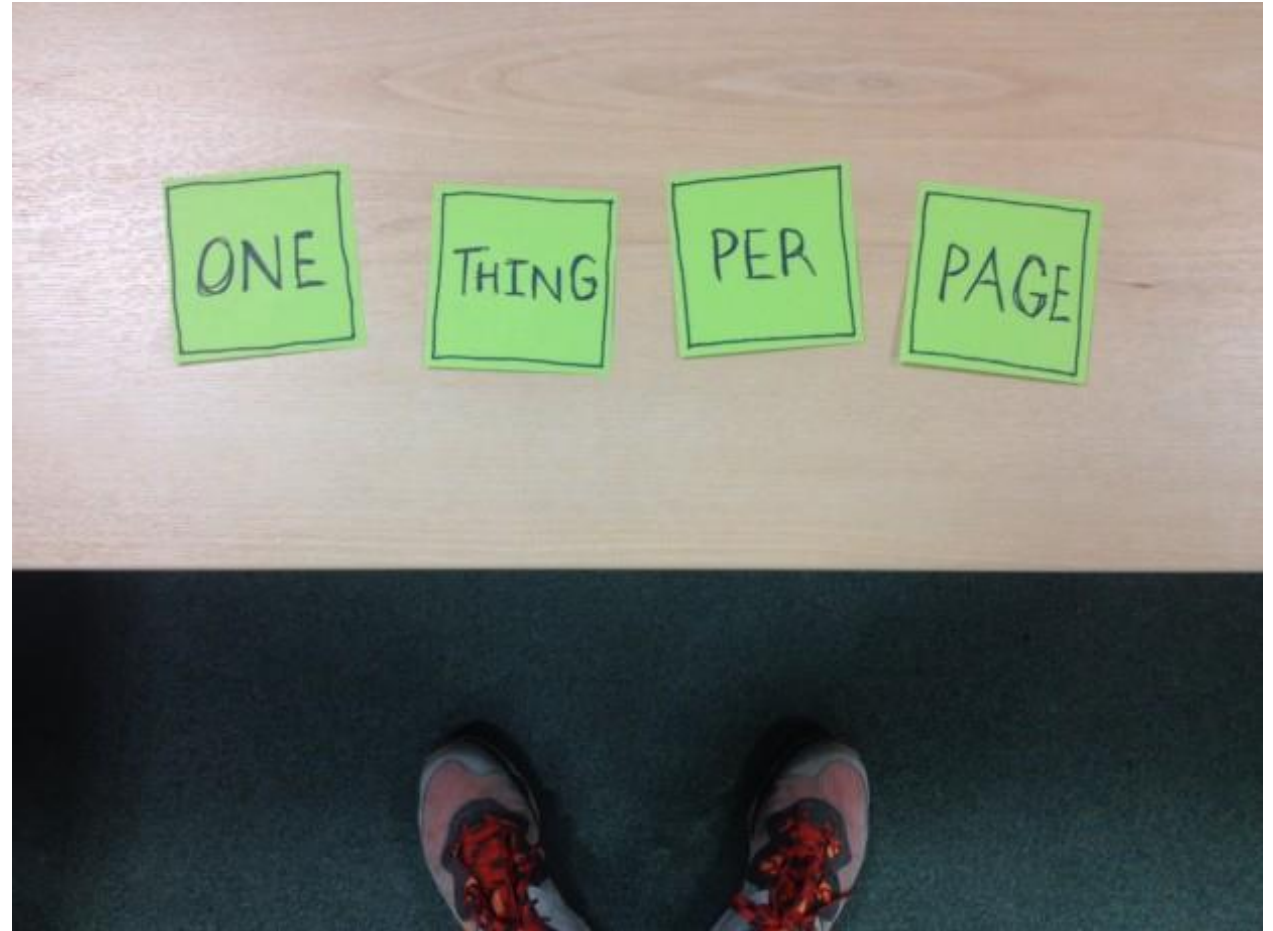# "Begin prototyping with one thing per page"

We noticed that many forms we reviewed had far too much stuff on each page

It's better to:
- begin prototyping with one thing per page
- do user research to decide how to group things into pages

Sometimes one question per page is plenty.

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

https://designnotes.blog.gov.uk/2015/07/03/one-thing-per-page/

Some forms have hundreds of boxes

We need structures to help people to understand and get through complex forms like this one

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1164692/IHT400_English.pdf

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

What makes up your Inheritance Tax account – schedules

To make a complete account of the estate you may need to fill in some separate schedules.

Answer the following questions by ticking the 'No' or 'Yes' box.

29a Residence nil rate band
Do you want to use the residence nil rate band?

No ☐   Yes ☐   Use Schedule   IHT435

29b Transfer of unused residence nil rate band
Do you want to transfer any unused residence nil rate band from the deceased's spouse or civil partner who died before them?

No ☐   Yes ☐   Use Schedule   IHT436

29c Transfer of unused nil rate band
Do you want to transfer any unused nil rate band from the deceased's spouse or civil partner who died before them?

No ☐   Yes ☐   Use Schedule   IHT402

30 Gifts and other transfers of value
Did the deceased make any lifetime gifts or other transfers of value on or after 18 March 1986? See IHT400, 'Notes'

No ☐   Yes ☐   Use Schedule   IHT403

31 Jointly owned assets
Did the deceased jointly own any assets (other than business or partnership assets) with any other persons?

No ☐   Yes ☐   Use Schedule   IHT404

32 Houses, land, buildings and interests in land
Did the deceased own any houses, land or buildings or have rights over land in the UK in their sole name?

No ☐   Yes ☐   Use Schedule   IHT405

33 Bank and building society accounts
Did the deceased hold any bank or building society accounts in their sole name, including cash ISAs, National Savings and Premium Bonds?

No ☐   Yes ☐   Use Schedule   IHT406

34 Household and personal goods
Did the deceased own any household goods or personal possessions?

No ☐   Yes ☐   Use Schedule   IHT407

If the deceased did not own any household goods or personal possessions or they do not have any value, please explain the circumstances in the 'Additional information' boxes on page 16.

35 Household and personal goods donated to charity
Do the people who inherit the deceased's household goods and personal possessions want to donate some or all of them to a qualifying charity and deduct charity exemption from the value of the estate?
For example, they may wish to donate the deceased's furniture to a charity shop

No ☐   Yes ☐   Use Schedule   IHT408

36 Pensions
Did the deceased have any provision for retirement other than the State Pension? For example, a pension from an employer, a personal pension policy (or an alternatively secured pension)

No ☐   Yes ☐   Use Schedule   IHT409

37 Life assurance and annuities
Did the deceased pay premiums on any life assurance policies, annuities or other products which are payable either to their estate, to another person or which continue after death?

No ☐   Yes ☐   Use Schedule   IHT410

38 Listed stocks and shares
Did the deceased own any listed stocks and shares or stocks and shares ISAs (excluding control holdings)?

No ☐   Yes ☐   Use Schedule   IHT411

39 Unlisted stocks and shares and control holdings
Did the deceased own any unlisted stocks and shares, or any control holdings of any listed shares?

No ☐   Yes ☐   Use Schedule   IHT412

40 Business Relief, business and partnership interests and assets
Do you want to deduct Business Relief from any business interests and assets owned by the deceased or a partnership in which they were a partner?

No ☐   Yes ☐   Use Schedule   IHT413

41 Farms, farmhouses and farmland
Do you want to deduct Agricultural Relief from any farmhouses, farms or farmland owned by the deceased?

No ☐   Yes ☐   Use Schedule   IHT414

The 'task list' pattern helps with complex forms

Task lists break up the form into sections

For the Census, this task list appeared after doing the section 'People who live here'.

Office for National Statistics

census 2021

Save and sign out

Choose another section to complete

✓ **People who live here**	Completed	View answers
Household and accommodation	Not started	Start section
Caroline Jarrett	Not started	Start section
Malcolm Jarrett	Not started	Start section

> **If you can't answer someone else's questions**

Continue

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

Task lists still need attention and content design

The GOV.UK Design System now has:

- The [Task list](#) component
- The [Complete multiple tasks](#) pattern

Caroline Jarrett   [Effortmark.co.uk](#) @cjforms [(CC) BY SA-4.0](#)

We don't yet have patterns for multiple people answering

Office for National Statistics

census 2021

Save and sign out

Choose another section to complete

✓ **People who live here**	Completed		View answers
Household and accommodation	Not started		Start section
Caroline Jarrett	Not started		Start section
Malcolm Jarrett	Not started		Start section

> **If you can't answer someone else's questions**

Continue

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Karen Fernandes and I did a talk on complex forms

The Phylogenetic Tree in forms design: making forms work for complex applications

Caroline Jarrett · 27 September 2023

What do we know about designing really complex forms?

When I first started discussing the world of grant applications with Karen Fernandes, Senior Product Manager at Cambridge University, I realised that we we now have plenty of good options for the simpler forms: one person dealing

A section of a "phylogentic tree" of pivot questions for a grant application

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0   The Phylogenetic Tree in forms design: making forms work for complex applications - Effortmark
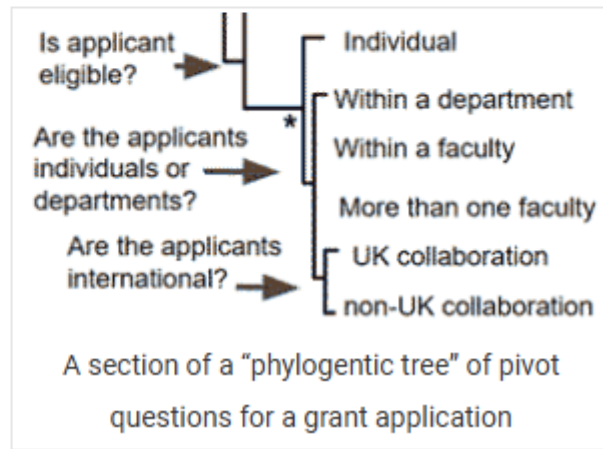
We can see some tasks lists in grant applications

Have all eligible costs been included in the application?

Have you complied with the funder guidance?

What is your statement of intent?

Have you completed the risk assessment?
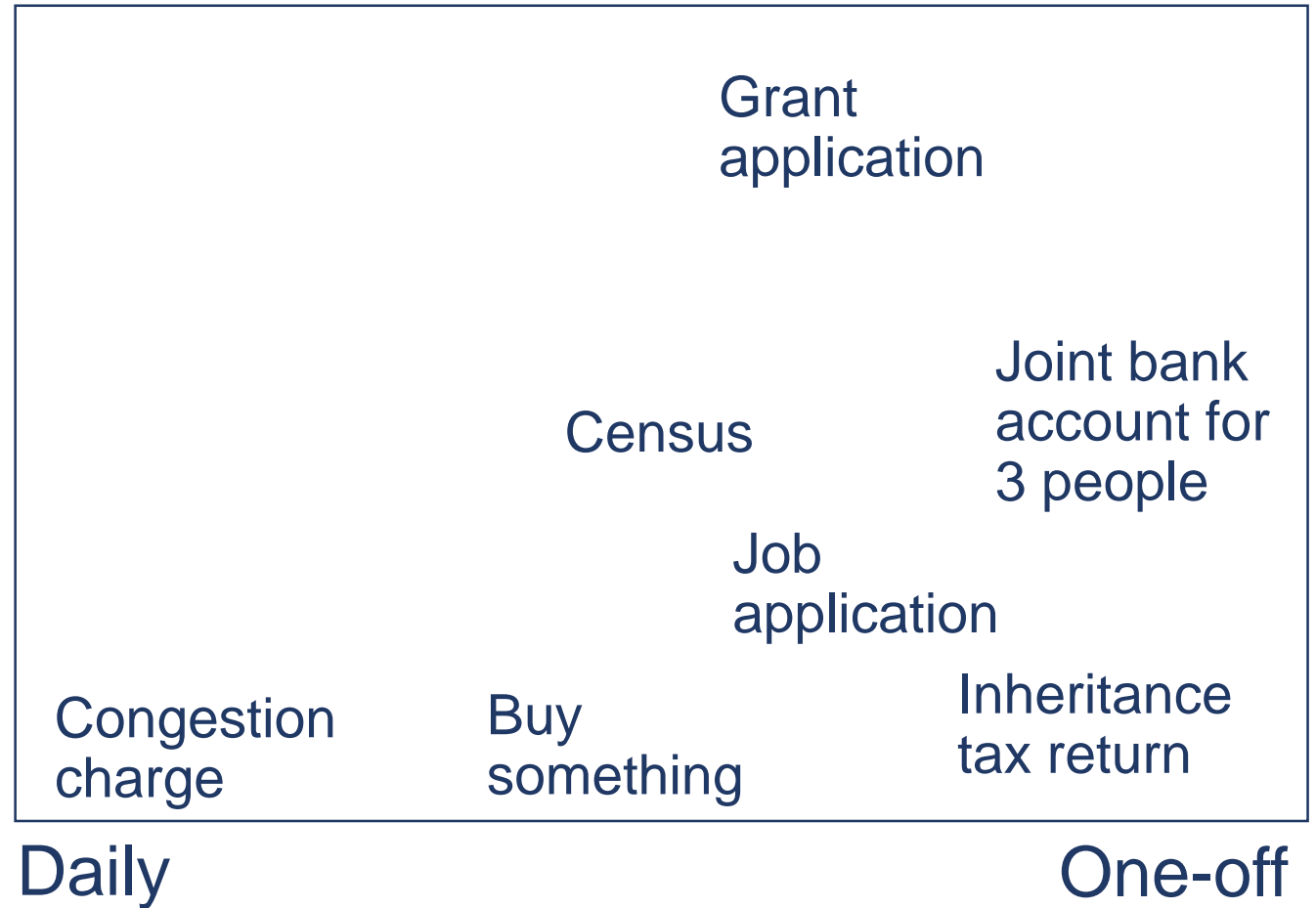
Do you require a data management plan?

Have you completed the justification of resources?

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I'm thinking about some sort of complexity matrix

Multi-organisation

Grant application

Multi-person

Census

Joint bank account for 3 people

Job application

Individual

Congestion charge

Buy something

Inheritance tax return

Daily

One-off

Possibly the matrix gets worse?

Multi-organisation

Multi-person

Individual

Grant application

Census

Joint bank account for 3 people

Job application

Congestion charge

Buy something

Inheritance tax return

Increasing complexity

Daily

One-off

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0
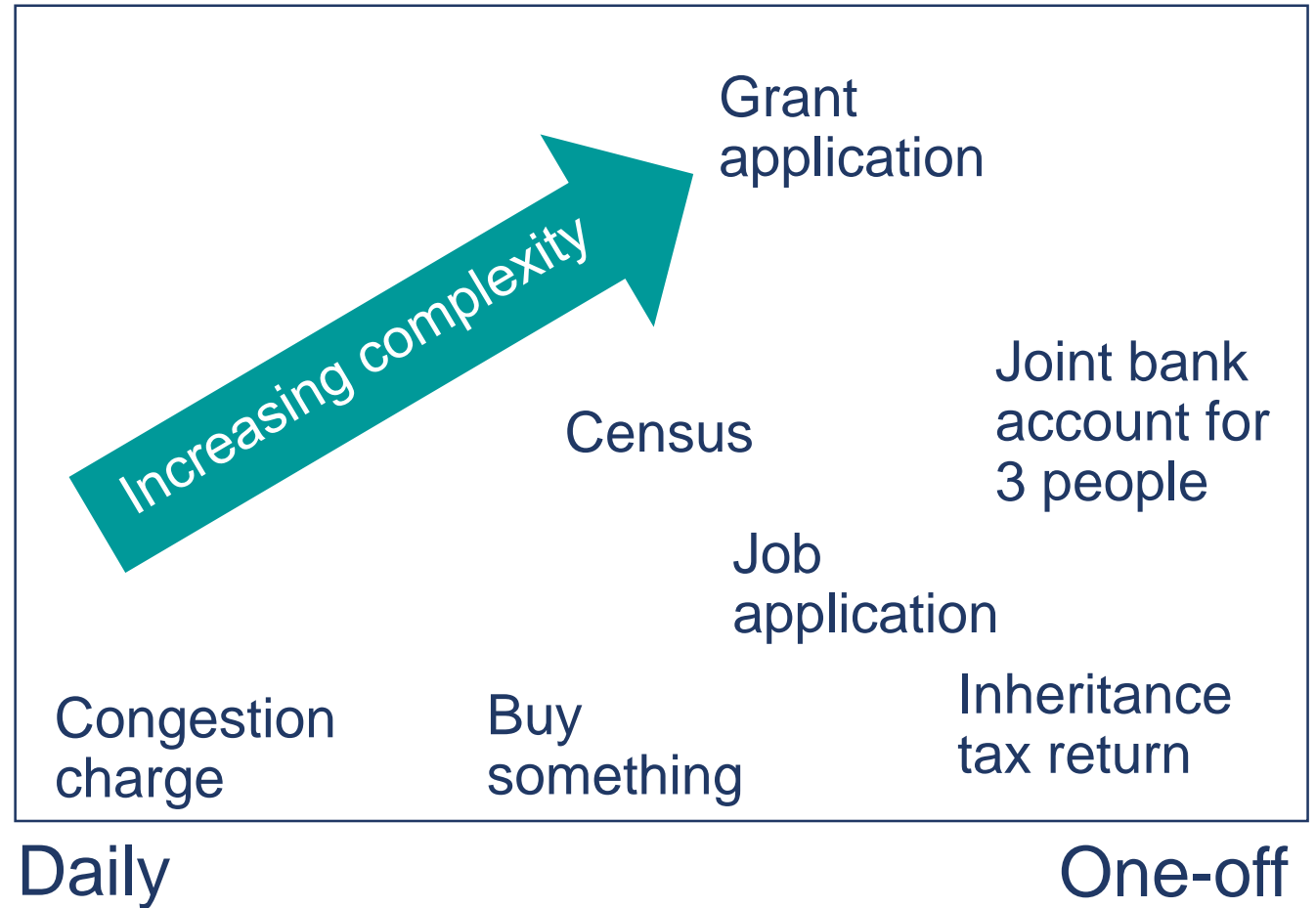
But maybe it doesn't work very well

Multi-organisation

Multi-person

Individual

Suspiciously empty area

Grant application

Census

Joint bank account for 3 people

Job application

Congestion charge

Buy something

Inheritance tax return

Daily

One-off

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0
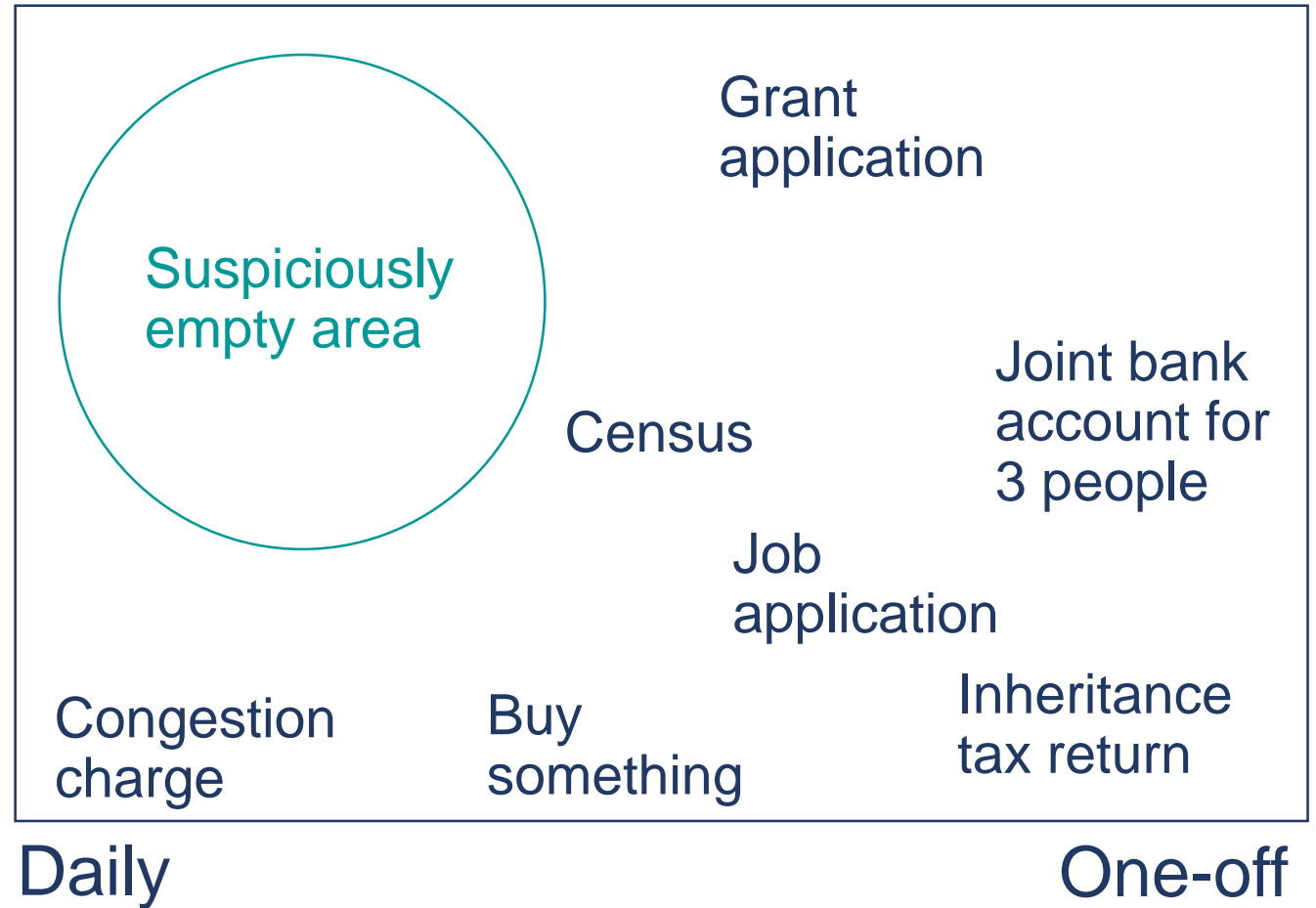
And timesheets are typically awful

Multi-organisation

Multi-person

Individual

Grant application

Census

Joint bank account for 3 people

Job application

Inheritance tax return

Timesheets

Buy something

Daily

One-off

Bilingual forms need to stick to one language at a time

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0
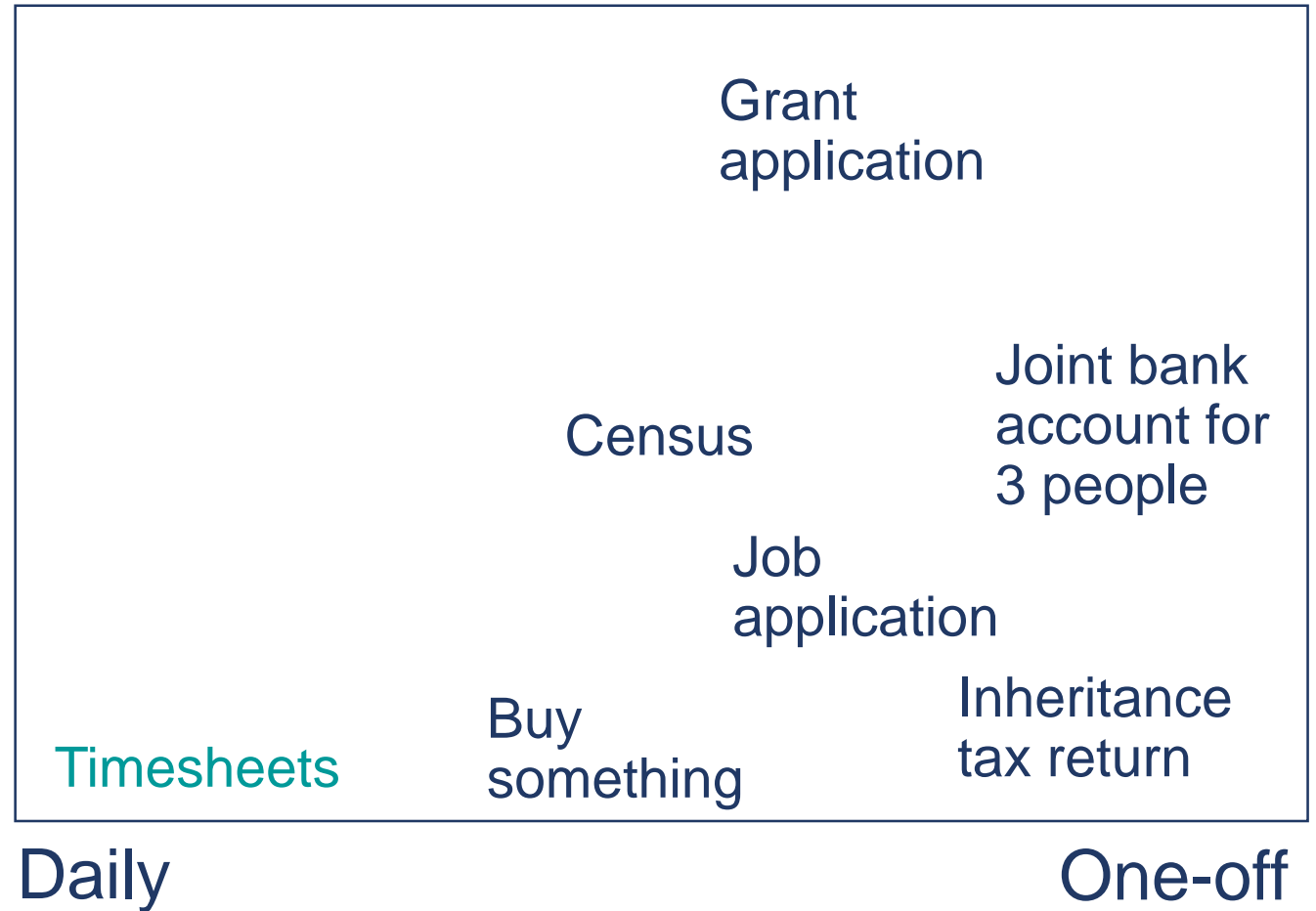
Interleaving languages makes text harder to read

Diolch i chi am lenwi'r ffurflen gydsynio Brechlyn Ffliw Trwynol, mae hwn wedi'i dderbyn a bydd yn cael ei wirio gan y Tîm Imiwneiddio Nyrsys Ysgol.

Thank you for completing the Nasal Spray Flu Vaccine consent form, this has been received and will be verified by the School Nursing Immunisation Team.

--- Rydym yn croesawu cael gohebiaeth yn Gymraeg, y byddwn yn ateb gohebiaeth yn Gymraeg, ac na fydd gohebu yn Gymraeg yn arwain at oedi. We welcome receiving correspondence in Welsh, and we will respond to correspondence in Welsh, and that correspondence in Welsh will not lead to delay.

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

This hotel sent me a survey invitation with 24 languages

Caroline Jarrett Effortmark.co.uk @cjforms (CC) BY SA-4.0

I could have a look at French

BONJOUR CAROLINE JARRETT,

Merci d'avoir séjourné chez nous. Nous espérons que vous vous êtes bien amusé !

Nous sommes toujours prêts à perfectionner le moindre détail.
Alors, si vous avez des commentaires, n'hésitez pas à les partager. Vous nous rendriez un fier service !

Comment évaluez-vous votre EXPÉRIENCE en général avec notre hôtel ?

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

1 Très pauvre - 10 Exceptionnel

Et, au cas où vous seriez vraiment de bonne humeur, sachez que nous adorons les bons commentaires.
Nous avons ajouté un lien vers à la fin de l'enquête.

Nous espérons vraiment vous revoir bientôt au Radisson RED !

GARY WARING
GENERAL MANAGER
RADISSON RED LIVERPOOL

Nous accordons une grande importance à la protection de votre confidentialité.
Consultez la politique de confidentialité de Radisson Hotel Group sur:
radissonhotels.com/fr-fr/donnees-personnelles

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Arabic reads right-to-left, but English names and titles are left-to right

، CAROLINE JARRETT مرحبًا بك

نتمنى أن تكون قد استمتعت بوقتٍ رائع!

نحن نهتم دائمًا بإجراء تغييراتٍ وتجديدات.
ولذلك، إذا كان لديك أي ملاحظات، فنرجو منك إخبارنا بها. وستكون قد أسديت لنا معروفًا كبيرًا!

كيف تقيّم تجربتك في فنادقنا بشكلٍ عام؟

1	2	3	4	5	6	7	8	9	10

1 ضعيف جدًا ــ 10 استثنائي

وإذا كنت ممن يحبون مشاركة آرائهم على مواقع التواصل، تسعدنا مشاركتك بتقييم جيد لنا
لقد أدرجنا رابطًا إلى   في نهاية الاستبيان.

يسعدنا أن نراك مرةً أخرى في راديسون رِيد في القريب العاجل!

GARY WARING
GENERAL MANAGER
RADISSON RED LIVERPOOL

خصوصيتك تهمنا. شاهد سياسة خصوصية مجموعة فنادق راديسون على: radissonhotels.com/ar-ae/privacy

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You can only 'unsubscribe' in English, though

CAROLINE JARRETT ، مرحبًا بك

نتمنى أن تكون قد استمتعت بوقتٍ رائع!

نحن نهتم دائمًا بإجراء تغييراتٍ وتجديدات.
ولذلك، إذا كان لديك أي ملاحظات، فنرجو منك إخبارنا بها. وستكون قد أسديت لنا معروفًا كبيرًا!

كيف تقيم تجربتك في فنادقنا بشكلٍ عام؟

1	2	3	4	5	6	7	8	9	10

1 ضعيف جدًا ـ 10 استثنائي

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لقد أدرجنا رابطًا إلى في نهاية الاستبيان.

يسعدنا أن نراك مرةً أخرى في راديسون ريد في القريب العاجل!

GARY WARING
GENERAL MANAGER
RADISSON RED LIVERPOOL

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...ed by ReviewPro, click here to unsubscribe

I got a different and slightly weirder survey by clicking the main invitation and then changing language
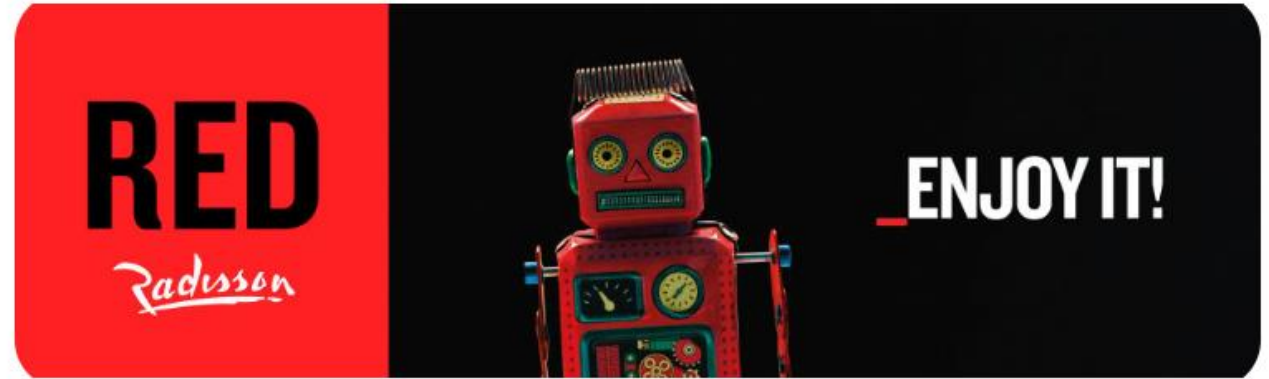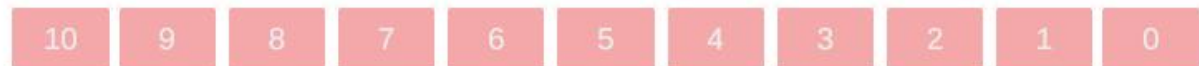
Radisson RED Liverpool

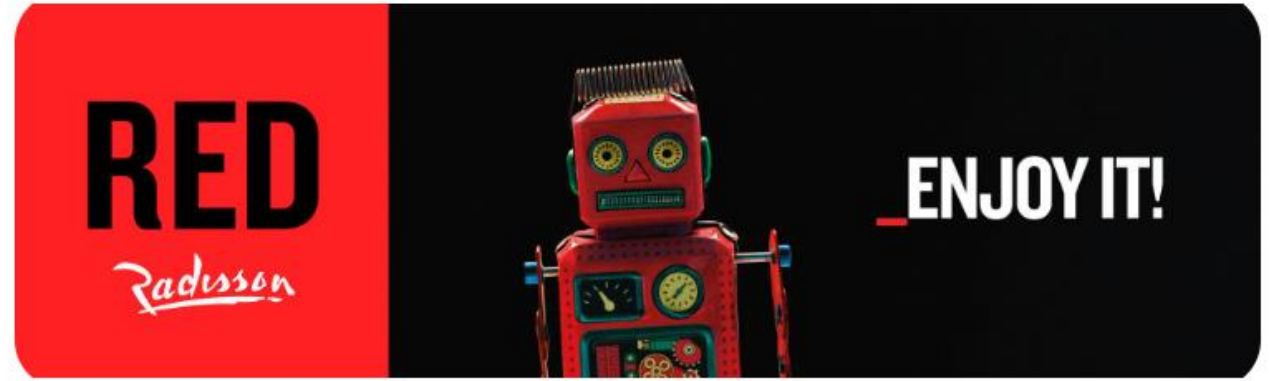* كيف تقيّم تجربتك في فنادقنا بشكلٍ عام؟

7 - جيد

التالي

هل تنصح بهذا الفندق؟

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | 0 |

ممكن جداً

من غير المحتمل

التالي

Can we all see where to change from Arabic to another language?

العربية

Radisson RED Liverpool

* كيف تقيَّم تجربتك في فنادقنا بشكلٍ عام؟

7 - جيد

التالي

هل تنصح بهذا الفندق؟

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | 0 |

ممكن جداً

من غير المحتمل

التالي

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Many people will choose English because it's their second or additional language

How many will know "chipping in"?
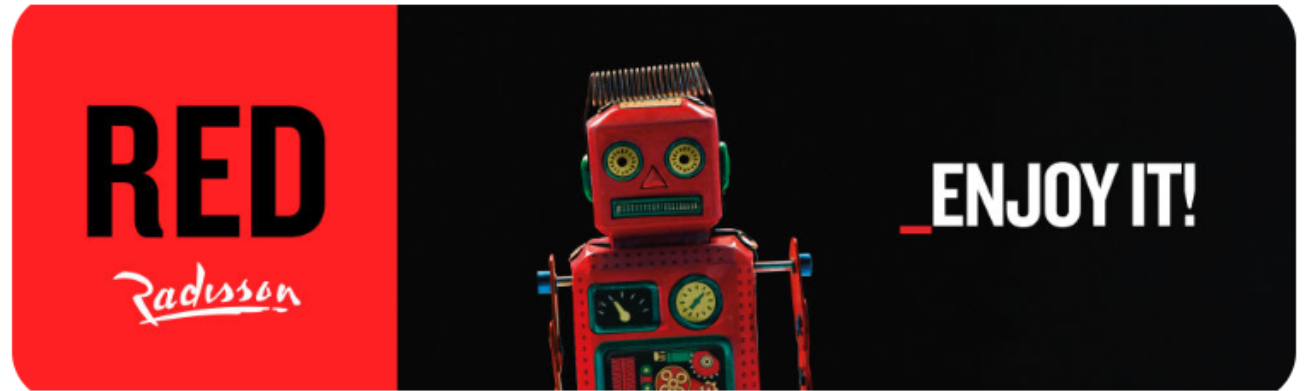
Radisson RED Liverpool

THANKS FOR CHIPPING IN!

We're a pretty keen bunch so we'll take your comments to heart.

If you've got another trip planned, why not visit our website for some extra inspiration?
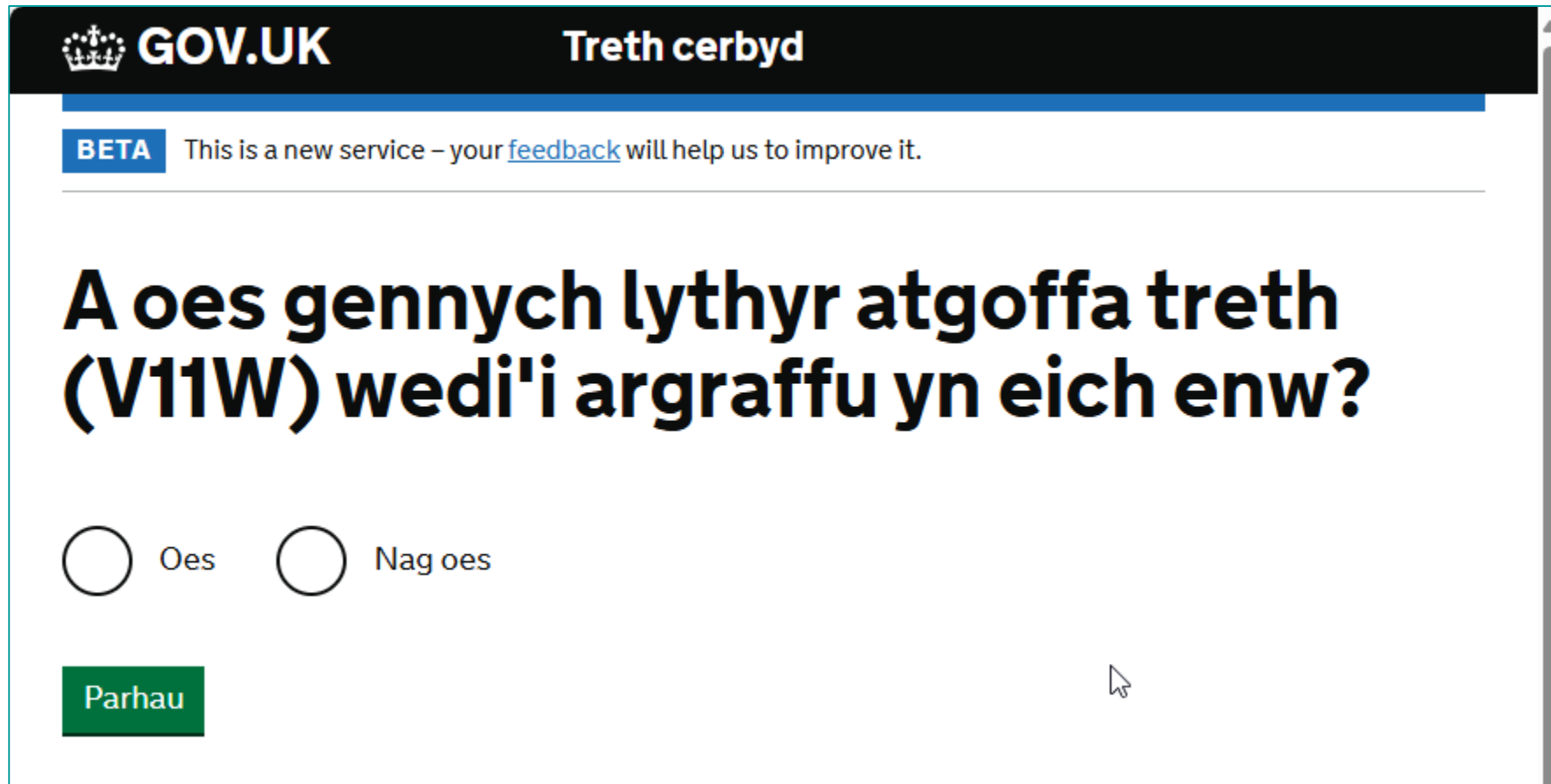
We'd love to have you back!

radissonhotels.com/red

Radisson Rewards Members get more.

Not a member yet? Join today!

radissonhotels.com/rewards

I tried paying my car tax in Welsh
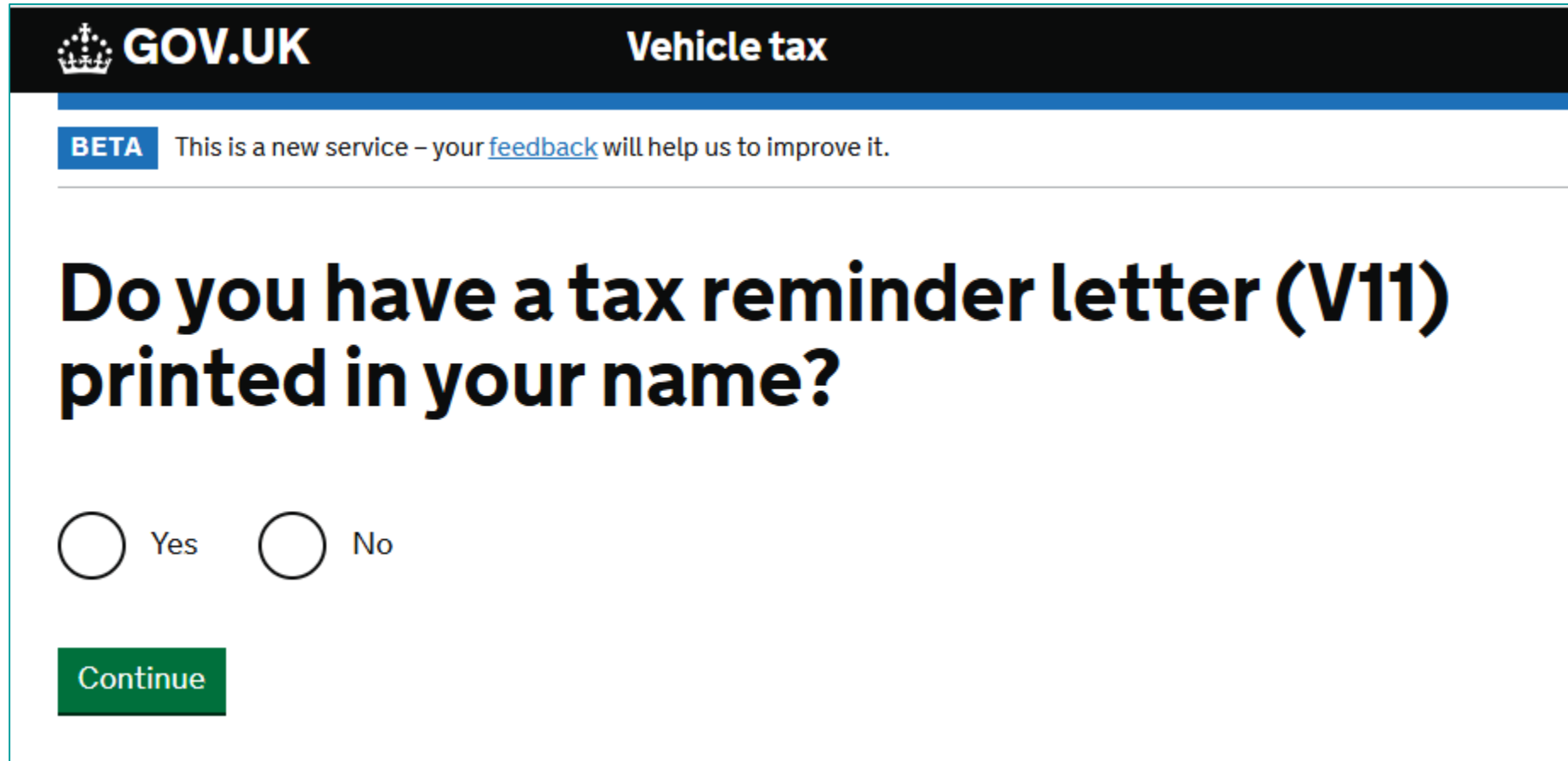

GOV.UK — Treth cerbyd

BETA This is a new service – your feedback will help us to improve it.

A oes gennych lythyr atgoffa treth (V11W) wedi'i argraffu yn eich enw?

◯ Oes   ◯ Nag oes

Parhau

I can only help to improve the service in English

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This is a double-barrelled question in any language

GOV.UK — Vehicle tax

BETA This is a new service – your feedback will help us to improve it.

Do you have a tax reminder letter (V11) printed in your name?

○ Yes   ○ No

Continue

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Taxing a vehicle - GOV.UK (vehicletax.service.gov.uk)

Do usability testing of your form

Get someone to fill in your form
while you watch

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Illustration by Tasia Graham for "Surveys that work: A practical guide for designing better surveys" by Caroline Jarrett

Let's chat! Caroline Jarrett

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