



Designing forms

What is a form?

A form is a document used as a gateway to an organisation's services, to collect information, to give information, and to allow management or policy decisions.

What is forms design?

Forms design is about effective communication. It looks at the way forms are used, written and designed. Forms design means more than just making forms look good.

It also means:

- Reviewing and evaluating forms
- Questioning whether the form is necessary
- Looking at the costs of producing forms
- Simplifying forms
- Using language and design to help form-fillers understand the form
- Improving systems for managing and producing forms

Where did it all begin?

People have been writing about document design since the early days of modern printing. While forms have been around for over 150 years, forms design theory is a fairly recent concern, particularly for government and business. Research into the way forms are designed and used is becoming widespread.

In 1982, Derek Rayner prepared a report for the UK Government called Review of Administration Forms. Rayner identified the Department of Health and Social Security as the largest government user of forms in the UK. That Department had over 12000 different forms. Half of these forms were issued to the public in numbers of between 10,000 and 30 million each year (Forms Effective Study, Coopers and Lybrand, 1984).

The Rayner Report sparked a project to review government forms in the UK. Similar studies were run in Australia, Canada and the United States. Since the early 1980's, people all over the world have been looking at the effects of better forms design and forms management on business efficiency and the quality of information provided by business and government.

In Australia, the Federal Government had initiated a plain English and simpler forms program. In 1983, the Prime Minister said there was a need to "identify and critically evaluate the effectiveness of official forms as a means of obtaining relevant information".

Reasons for producing better forms

Here are a few good reasons for improving forms design:

- Vast amounts of money and time are spent processing and rectifying inefficient government and business forms
- Forms are a key tool for gathering, providing and managing information
- Informed decisions need high quality data
- Between 90-100% of forms are completed incorrectly (Communications Research Institute of Australia, 1991)
- Good forms improve people's access to information

The process for designing a form

Here are some steps for redesigning a form.

If you are beginning a new form, then ignore steps 1 and 2:

1. Evaluate the current form to see how it performs
2. Decide if a new form is required
3. Set the criteria for the new form
4. Prepare a question protocol and test it.
5. Make amendments to the question protocol
6. Test and revise the question protocol until you are satisfied that it works
7. Think about the design of your form e.g. special instructions, routing devices, structure
8. Evaluate the form
9. Address any problems revealed in evaluation and make amendments to the form
10. Test and revise the form until you are satisfied that it is ready for final testing
11. Run final useability testing
12. Make amendments and re-test
13. Regularly revise the document after it had been implemented.