Forms Camp Session 1: Design with Margaret Hagan

Font and Color Choice

For practical guidance on accessible PDF/doc design, Margaret recommends reviewing these guides:

- ➢ US Govt's Accessibility for Visual Designers: https://accessibility.digital.gov/visual-design/getting-started/
- ➢ https://www.rgd.ca/database/files/library/RGD_AccessAbility_Handbook.pdf (from Canada)
- ➢ US Digital Services (federal level) guide to online accessibility (not just graphic design, but more web design & web forms) https://designsystem.digital.gov/documentation/accessibility/

Form Length

This will involve user testing and advocate/expert review. Consider "Max Time to Complete" vs "Max Page Number." Also ask is "Is this form so long, that the user will disengage and never complete it?" The forms team will need to strike a balance between 'time for average user to complete' vs. 'thoroughness of them fully making a strategic claim.'

The forms design group will also have to think if they're making the form from a software-first or pdf-first vision. For software-first, the form might be quite lengthy, but logical flows might make it pretty quick to actually complete because large sections don't have to be filled in.

Links, QR Codes, and Assistance Offramps

QR codes and URLs can help forms users obtain more information. Redundancy is good. Give two paths.

Since COVID, familiarity with QR codes has gone way up. The forms team will have to have a plan to maintain QRs and URLs and make sure they are stable!

Consider what the web experience is going to be like for the person who scans a QR code or types in a URL. Consider creating a special page for a person coming from a form. The page should clearly answer the user's key questions and keep the 'story' going for them. Avoid dropping a person into a general self-help page, or long page of information. Think about how a QR or URL 'offramp' page can help a stressed-out form-filler, so that they can quickly find the support they need.

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