

Field Guides  
To Ensuring Voter Intent

Vol. 10

# Creating forms that help voters take action

Field-researched, critical election  
design techniques to help ensure that  
every vote is cast as voters intend

The Field Guides  
are online at  
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# Creating forms that help voters take action

Fourth edition, 2018

## About the Field Guide series

If you could do just a few things that would make a big difference in the experiences voters and poll workers (and even candidates) have, what would those be? That's the question we tried to answer in each of the *Field Guides To Ensuring Voter Intent*.

Every guideline and example is based in research and practice. The guidelines come from sources ranging from the Election Assistance Commission, to the National Institute of Standards and Technology, to lots of our own research conducted alongside county and state election officials. We've tried to make each one easy to follow. You should be able to implement most of the guidelines independent of election laws or voting system technology.

— Dana Chisnell, *Field Guides Editor*

## About this Field Guide

Elections are built on a foundation of forms. You know that the design of a form can make your work easier or more difficult.

And of course you want to get feedback from all of your audiences. One way to do that is to conduct surveys.

This Field Guide covers pointers on how to create forms and surveys that make it easy for people to give you the information you need.

You might also want to read these related Field Guides:

Vol. 01: Designing usable ballots

Vol. 03: Testing ballots for usability

Vol. 07: Designing election websites

## About the research behind this Field Guide

Creating a form that collects the information you need, in a way that makes it easy to use, is a special skill. Few people on the planet know more about how to design effective forms and surveys than our friend, Caroline Jarrett. Caroline was generous enough to help us with this Field Guide, based on her long career of research in forms and survey design.

We drew on the excellent work of the United Kingdom Government Digital Service (GDS). Their team has done pioneering research on how the public interacts with online forms. We were shameless about borrowing from their findings.

We also used what we learned in our usability testing of voter registration and absentee ballot forms, and from watching voters try to use many online election forms.

To learn more about the sources behind this guide and download examples, go to [civicdesign.org](http://civicdesign.org).

**Give your form an active title**

**Use:** Register to vote  
Find your polling place

**Avoid:** Voter registration  
Polling places

**If a form has two purposes, make this clear.**

**Use:** Register to vote  
**-OR-**  
Update your voter registration

See also:

Vol. 05.02: Treat all communication as a conversation.

**No. 01****Be clear about what voters can do with the form.**

Make sure the title of the form clearly reflects the purpose, from the voters' perspective.

**Before:** Residence address  
Voter declaration  
I declare, affirm, and certify...

**After:** Your address  
Your email  
Print your name  
Voter, sign here  
I declare that...  
The address where you receive mail

See also:

Vol. 01.05: Use clear, simple language.

**No. 02****Make sure voters understand the questions.**

Use simple, active, easily understood words for field labels.

Write field labels so they don't confuse people who are reading quickly, or who don't read well.

The diagram shows a form with several fields. A large circular callout highlights a section with a checkbox labeled "Same as above OR" and fields for "Street", "City", "State", and "Zip code". A smaller circular callout highlights a section titled "Are you:" with checkboxes for "Female", "Male", "Other", and "Prefer not to say".

See also:

Vol. 02.02: Put instructions where voters need them.

No. 03

## Make it possible to answer every question.

Give people a way to answer every question. They worry about leaving answers blank – even when it would be OK to do so.

Indicate required fields appropriately:

Online: mark **required** fields

On paper: mark **optional** fields

The diagram shows a form with vertical dashed lines indicating consistent spacing and margins throughout the layout.

See also:

Vol. 01.03: Use big enough type.

Vol. 01.04: Pick one sans-serif font.

Vol. 01.09: Use contrast and color to support meaning.

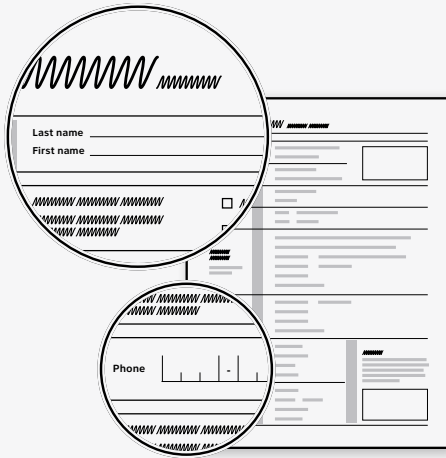
No. 04

## Make the layout neat and tidy.

Forms that look well-organized are easier to fill in, and give voters more confidence.

Line things up with consistent spacing and margins.

Make the form easy to use with large enough text and good contrast.



## No. 05

## Make the space for the answer fit the format.

Make fields big enough to fit the expected answer.

Use an appropriate format for fields showing the type of answer needed.

Online, use checkboxes instead of dropdowns when possible.

## Before

I HEREBY DECLARE THAT on the day of the next election I will have been a United States citizen for at least one month; will be at least 18 years of age; and am legally qualified to vote. I affirm that the information I have provided in this registration declaration is true. I understand that this registration declaration will be accepted for all purposes as the equivalent of an affidavit; and if the registration contains a materially false statement, I will be subject to penalties for perjury.

## After

**I declare that:**

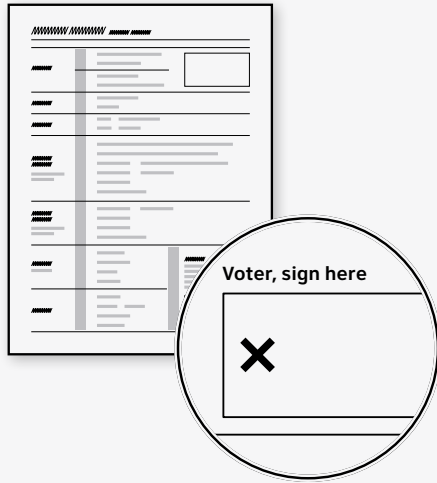
- I am a United States citizen and will have been a citizen for at least 1 month on the day of the next election.
- I will be at least 18 years old on the day of the next election.
- I live at the address in section 5.
- I am legally qualified to vote.

## No. 06

## Make legal text easier to read.

Simplify when you can.

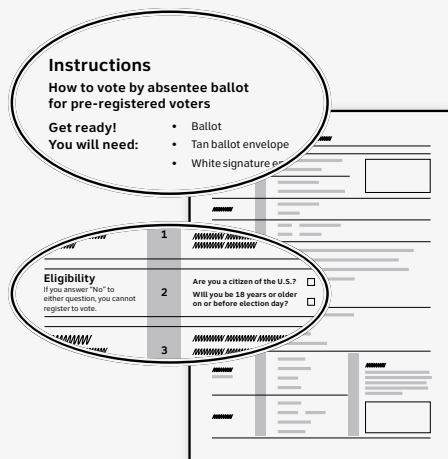
Break the clauses in declarations and affidavits into separate bullets.



No. 07

# Make signature fields stand out.

Using an X to mark the location for a signature helps people get it right.



No. 08

# Put instructions and error messages where they will be noticed.

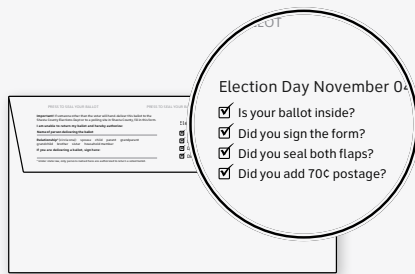
Start with anything the voter needs to do to prepare.

Put instructions, hints, and warnings before the field, not after.

Online, list errors at the top of the page, and highlight the location in the form.



See also:  
 Vol. 02.03: Include information that will prevent voters from making errors.  
 Vol. 04.06: Put warnings before — not after — consequences.



See also:

Vol. 01.05: Support process and navigation.

Vol. 05.03: Help voters move among media easily to get more information or take action.

No. 09

## Tell voters what to do with the form when they are done.

Put the information at the end of the form, where voters will see it when they are finished filling in their information.

### Watch for any signs of problems:

- Making corrections
- Hesitating while filling in information
- Overfilling entries that don't fit in the space
- Reading labels or instructions several times
- Hunting for information on or off the form
- Skipping fields or required information
- Making any mistake that would invalidate the form

See also:

Vol. 03: Testing ballots for usability

No. 10

## Watch people filling in the form.

Usability testing for forms includes watching to see if voters can provide all the information needed without help. Make sure voters can:

- Understand the questions
- Read the form easily
- Fill in the form without mistakes

**Tip**

Check that people can provide all necessary information without help.

**Can voters:**

- understand the purpose of the form?
- identify who will have access to the information in the form?
- answer all the questions (**can** and **are willing to**)?
- tell what is required and what is not?
- complete the form accurately?
- sign (if needed) in the right place?
- send the form to the right place?

**Notes****Notes**



## Who made this Guide possible?

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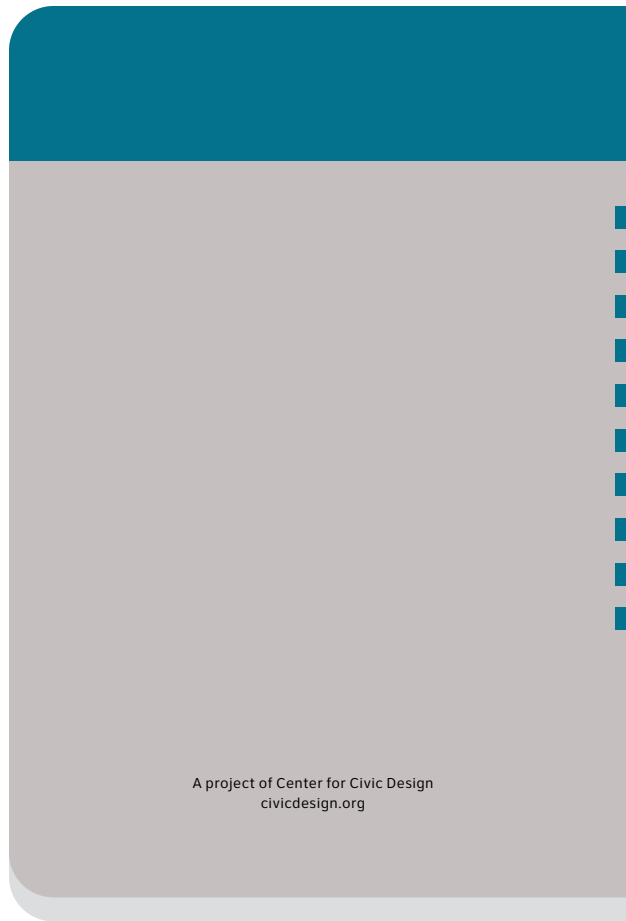
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