

Creating accessible forms

Introduction

Creating an accessible form can seem tricky. Some of the questions people commonly ask include:

- Can I use protected forms?
- How do I lay out my prompts and questions?
- Can I put everything in a table?

So, before you start work on your form, read through the following guidelines.

1. Keep it simple.

One of the best pieces of advice is to keep the content and overall layout simple. If the form is over-designed then it is going to require more work to complete - especially if the person completing it is using magnification and screenreading software.

Bear in mind that people often don't have a lot of time to fill forms in - so keeping things simple benefits everyone.

2. Keep it consistent.

The layout should be consistent. For example, each question starts at the left margin. If you think you need to change the layout then ask yourself it's absolutely necessary.

If you have one question on each line don't change this by switching to two or three questions on each line. Think about how the form flows from line to line and maintain this uniform approach throughout.

You're likely to use some form of prompt to indicate where a response should be added. Make sure these are consistent as well. For example, each prompt starts left aligned on a new line.

3. Use prompt terminators.

A prompt terminator is a character that terminates a prompt! For example:

First Name:
First Name?

In each of the above there is a prompt terminator - in the first case a colon is used and in the second a question mark is used.

A simple form can be as easy as text prompts with consistent prompt terminators, for example:

Title:
First Name:
Last Name:

The main thing is to be consistent. The prompt terminator is there to indicate the end of the prompt and the beginning of the space in which to type. Always cater for this expectation.

4. Avoid right aligning elements in the form.

This creates unnecessary work for magnification users and may also result in confusing feedback from a screenreader. In fact, for some magnification users right aligned elements may be missed entirely.

Generally, people begin reading and scanning from the left hand margin, so design your form accordingly.

5. Don't convey information with formatting alone.

Don't convey any important information in your form using formatting alone e.g. bold, colour, italics.

For example, if you have areas that require the user to make use of, or refer to, a colour coded system this will result in accessibility issues. If this is the case, can you provide some text equivalents? Can you get the data you need using a different method, approach or technique?

6. If it's an electronic document and not a print one...

You won't be needing things like - leader dots, various decorative lines to indicate sections or breaks, loads of white space and guide borders around areas to indicate where to write and so on.

Remember to design your form from the ground up as a true electronic document, free of specific print environment techniques.

Can you guess what happens when a screenreader focuses on a row of leader dots?

7. Apply styles.

Make sure that all the text in your form is properly formatted using styles. Doing this ensures that your content is well structured and that the text conforms to Clear Print standards.

- The title of the form can be set as Heading 1.
- Section titles can be set as Heading 2.
- Titles within sections can be set as Heading 3.

With styles applied to your form there is a clear hierarchy of headings - screenreader users in particular can use this information to skip around the form much more efficiently.

8. I can't use a table for layout - or can I?

This used to be a common approach with form design but using tables in this way is essentially taking a print orientated approach. Therefore try to avoid it.

That said, if you must absolutely use a table - for example, you may need to have hard copy of the forms - then remember the following:

- **Always use regular tables:** In other words, keep the same number of columns and rows throughout. (Please refer to guidance on creating accessible tables for further information on this.)
- **Do not over-format the table:** Tables can be formatted in all different colours and the table cells can be shaded and filled in also. But applying fixed colour formatting can create accessibility problems so avoid doing this - leave the default automatic setting unchanged.

- **If you are using 'fields', keep the prompt in the same cell:** If you are going to use proper fields in the table you must put the text labels and the fields in the same cell.
- **Be consistent in your approach:** Maintain a sense of navigation consistency throughout. If your prompts are in column 1 and the responses are always typed into column 2 then maintain this throughout the form where possible.
- **Provide added text guidance:** Provide additional contextual information throughout your form. This can provide guidance on how to navigate and complete certain areas. Advice on how best to navigate the form from the keyboard can also be provided. Note that this information doesn't have to be in the form itself, it can be included in any supporting documentation or a covering email.

Overall though, you need to question whether you really need to use a table for layout in an electronic form in the first place. What benefit does using a table for layout add to your form?

9. Can I use protected forms?

This is one of those big 'well, it depends' kind of questions. If the integrity of the document is absolutely vital and protecting a form is a step you must take then the answer is 'yes' - technically you can use protected forms.

However, you need to be aware that protected forms can cause substantial accessibility and usability problems. Note that:

- There is no guarantee that the Access Technology used by the person completing the form will work efficiently (or at all) in reading protected forms.
- The Access Technology user may not be conversant in dealing with protected forms using their Access Technology.
- Different versions of MS Word may result in unpredictable output and possibly even no output at all.
- The form designer needs to build in more information by adjusting individual properties for the fields and ensuring that the layout of the design is consistent and well organised.

But what do we mean by protected forms? In MS Word it is possible to place fields (edit fields, combo boxes or drop down list boxes and checkboxes) in the page - these fields are where the data is input.

For example, here is a prompt with an edit field:

First Name:<TYPE HERE>

Once all the fields are in place the document writer then locks the form. The end result of this is that the PC cursor - the cursor you move with the arrow keys in any Word document - can only move between the fields, generally by tabbing. Anyone using the mouse is also limited to clicking into the fields - the rest of the document is secured and cannot be tampered with.

When would you need to do this? You lock a form down when you need to preserve its layout and formatting or when you require specific types of answer to certain questions. For example, when you need specific responses using a limited set of options as defined in a drop down list. That said, simple prompts using the 'Delete as appropriate' technique achieve the same effect without the need to lock the form down.

If you have to use fields then you need to customise the Properties options for each field. Doing this gives you the ability to provide some additional contextual help (for screenreader users especially).

For example, take the simple edit field shown earlier. When I right click on the field in my document (or use the right hand Windows key or Shift F10) I can access the Properties option. After accessing this, the Text Form Field Options dialog box opens and I can Tab or click on the Add Help Text button.



Figure 1: The Form Field Help Text multi-page dialog box.

The Form Field Help Text multi-page dialog box that opens allows me to:

- Write a custom help message that can be written to the Status Bar area in MS Word.
- Create a custom help message that will be shown in a message box when the F1 key is used within the field.

I choose the Type Your Own radio button (you can use the keystroke of Alt T to access this option on each page) and then tab to the main edit field where I type in my custom help message - for example: This is the Surname Edit Field.

When I have set these options on both of the pages I can tab to OK to confirm the changes.

Now when the keyboard focus is placed on the edit field the custom help message is written into the Status Bar where it can be read by a screenreader. Also, pressing the F1 key will open a small message box with the Help Key custom message in it. When you include these custom help messages you may want to indicate this in any supporting documentation.

While protected forms are perhaps not quite the problem they used to be you must still bear in mind that they can introduce real access problems. For this reason, we do not recommend their use.

10. Do I have to produce different versions of the same form?

This is a decision you need to make on a job by job basis.

If the form you are creating is going to be available in print then it is likely that it will vary in style from a purely electronic document. In such cases different versions of the form will be required.

A simple form to be completed electronically and formatted with styles should not require several different version unless it is for changes in font size (large print).

11. Place text labels logically next to fields.

If you are using fields in a document then all of the prompt labels need to be arranged to the immediate left or directly above the input fields. There

is no need to leave large areas of white space between prompts and the input fields. This will cause problems for both magnification and screenreader users.

12. If in doubt - test it!

Forms can be very individual things. You might think your form looks and works brilliantly but this can actually be the essence of the problem - the form is not just for you.

Given that there is a diverse range of abilities and access technologies, conducting some user testing is invaluable.

End of document.