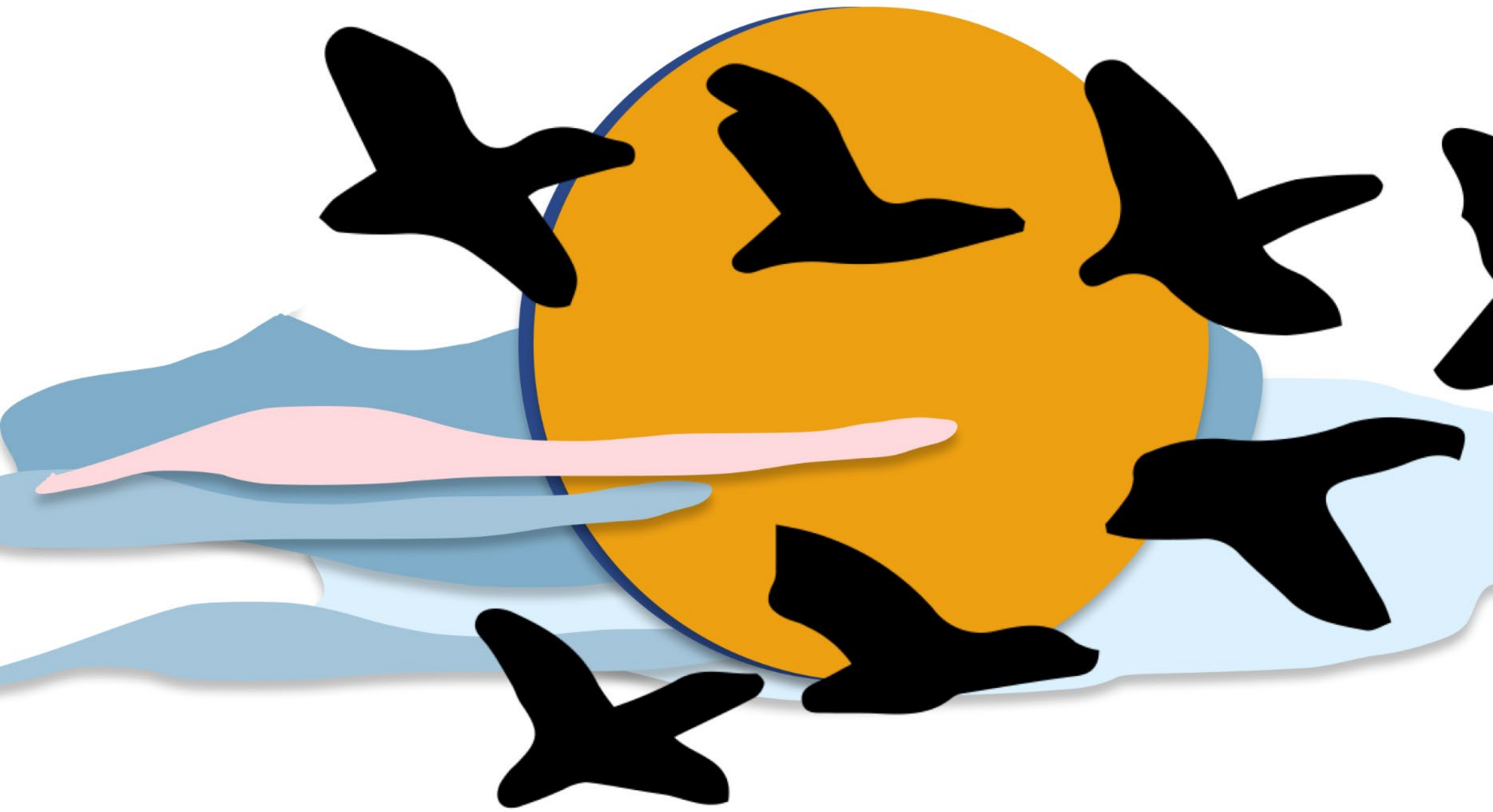
A FIELD GUIDE

FOR AND BY
PUBLIC SERVANTS

to fix government forms



The Lab @ DC
District of Columbia Government

The Lab @ DC is an applied research and design team embedded in the Office of the City Administrator in the Executive Office of the Mayor for the District of Columbia. Our team is composed of civic designer researchers, social scientists, and data scientists.

We believe that DC residents deserve a government that asks questions, tests policies, and iteratively improves how it serves the community. We strive to meet that objective by meeting our city's most critical problems with scientific methods, civic design, and authentic partnership with District agencies and residents.

This guide was authored by Karissa Minnich with support from Lindiwe Rennert and Sam Quinney.

thelab.dc.gov | September 2025

THE LAB @ DC

GOVERNMENT OF THE DISTRICT OF COLUMBIA
MURIEL BOWSER, MAYOR

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Getting to know your guide

This guide is modeled on the work of The Lab @ DC. The Lab is an applied research and design team embedded in the District of Columbia Government's Office of the City Administrator. Our team is composed of civic designer researchers, social scientists, and data scientists. We believe that DC residents deserve a government that asks questions, tests policies, and iteratively improves how it serves its communities. We work towards that objective by meeting our city's most critical problems with scientific methods, civic design, and authentic partnership with District agencies and residents.

Our foray into forms began with an event we called Form-a-palooza. In the summer of 2017, we hosted this day-long session to overhaul a handful of DC Government's paper forms. The idea was simple. Who better to design for residents than residents themselves? We asked them, "which DC Government forms aren't working for you?" At the top of their list: the driver's license application, the basic business license, the child care voucher application, and others.

We brought together residents, our government colleagues, and experts in plain language and behavioral science to systematically improve five forms through guided facilitation. Design experts provided guideposts as residents prototyped in small groups and government staff offered context on the service itself. We left the day with robust user input and several prototypes that informed the final versions of the forms we went on to design.

In 2018 we repeated the event with five new forms. From there, things really took off. Colleagues across District Government were seeing our work and asking for help with their own forms. In those first couple of years, much of our form work focused on turning existing paper forms into better paper forms (we'll say more about paper versus digital on page 9). But when the COVID pandemic arrived in early 2020, we stepped up to make many new, digital forms to meet the moment—the Pandemic Unemployment Insurance application, a microgrant application for small, local businesses, and several forms for landlords and tenants to request financial assistance.

As of 2025, The Lab has developed over 60 forms used by over 15 DC Government agencies. And along the way, we've learned a few things. We think it's time that we shared with you—our fellow public servants—what has worked for us. This guide is written for public servants at all levels of government who find themselves equally challenged by confusing forms and looking for ways to improve customer service for their public.

In service,
The Lab @ DC

How to use this field guide

Field guides are practical tools that you take out into the "field," thumb through to identify something you see, and learn more about it. They are meant to be accessible to both an expert and an amateur—an ornithologist or the backyard birder. We hope that no matter your title or tenure in government, you will use this guide in your service delivery.

In the following pages you'll find our steps for form design. Throughout you'll see examples from The Lab's own form work. Toward the end of the guide, we've provided a notebook with pages that you can print and add notes to as you work on your own form design.

Whether you're revising an existing form or designing a new one, we recommend following the steps outlined sequentially—assemble your team, identify your users, map out the service process, assess the existing form if you have one, observe service delivery if you can, draft the form, and test it. Of course, the process isn't this tidy. It's iterative. After you draft, you'll test, and then you'll tweak, test again, and so forth until you've reached the form's most functional version.

A LITTLE BIRDIE SAYS...
that birds are going to be a running theme in this guide, so get your binoculars ready!

If a group of birds is a flock, what do you call a group of forms?

...a pack(et)

Introduction

Why forms matter

If you're a fan of NBC's Parks and Recreation, you might recall this scene where an exasperated resident walks into the Pawnee, Indiana Department of Parks and Recreation:

Pawnee resident: "My bird is missing! I need a permit to post signs."

Andy Dwyer, government worker: "Ok, let me just look for that form..."

Pawnee resident: "There's no time! He can fly!"

Jokes aside, we can all too easily empathize with the experience. Forms can feel like a tedious barrier that is out-of-touch with the urgency of your need. And they're everywhere! Applying for a driver's license? There's a form. Registering to vote? There's a form. Seeking a business license, enrolling in health insurance, signing your kid up for summer camp? Yep, there's a form.

But a poorly designed form isn't just frustrating. It can further burden the most burdened members of our public. It can dehumanize, eroding trust in government. And it can ultimately prevent someone from getting essential services. That's a lot of power for a piece of paper. And a lot of opportunity for government.

POORLY DESIGNED FORMS

Burden

If a form isn't written at an accessible reading level, residents are more likely to fill it out incorrectly and sink additional time into the application process. There can also be submission challenges. If they lack a printer or internet access, that may slow them down. If the form is required to be submitted in

person, but the resident doesn't have paid time off, childcare, or a flexible travel budget, they are further burdened with difficult trade-offs.

Traumatize

When the need for assistance is rooted in a trauma—for example, seeking temporary shelter after being evicted, requesting unemployment insurance after losing a job, applying for burial assistance after losing a loved one—being asked to extensively prove your need, may come at the expense of your mental and emotional health.

Dehumanize

When we label our residents by the services they seek (e.g., a homeless person, food stamp recipient, or voucher holder), we risk stigmatizing them for seeking assistance and put their personhood in second position.

Criminalize

"Incomplete applications will be rejected." "Falsifying information may result in a fine or criminal penalties." How many government forms start with this type of language? At a minimum, it's off-putting. At worst, these warnings can feel incriminating. Conflating need with criminal intent further reinforces that asking for services may not be worth the risk.

The origins of bad forms

Let's start by squashing the trope of the government bureaucrat sitting behind a desk thinking up ways to torture the public. That's not where bad forms come from. We've had the honor of working alongside hundreds of our dedicated DC public servants and when forms are struggling it's usually the result of some mix of these four things:

The curse of knowledge – it's hard to imagine what it's like for someone to not know what you know. As a public servant, you hold extensive knowledge about your service. But that makes it very hard to give clear and complete information to the public who might interact with your service every few years or once in a lifetime. The curse of knowledge results in unconsciously leaving out pieces of information that help the user complete your form successfully. If you want to really understand the curse of knowledge, watch these kids write instructions for their dad to make a peanut butter and jelly sandwich.

Sediment – government tends to add new programs, policies, and regulations faster than it removes or replaces them. These new requirements get added into forms as new questions and disclosure without a holistic review of the document. As a result, the form gets longer, it asks for the same information multiple times, and it can even contradict itself across pages.

Silos – what the public expresses as a singular need—e.g. opening a business—often transcends a single form or department. In these cases, it is rarely any public servants' express responsibility to think about the public's experience as they work through multiple department forms. Again, the public may find themselves asked for the same information multiple times and given contradictory information from one department to the next.

A lack of user testing – often forms simply aren't tested with the diversity of people who will use them. Despite our best attempts to create a good form on the first draft, no one can account for everything. This results in common user errors and accessibility challenges for those who have needs unique from the majority.

HOW TO SPOT BAD FORMS

A form in need of a redesign may be obvious to spot—you see high error rates in form submissions or you receive frequent complaints about it. But sometimes, it can be less obvious. Underutilization of your service may indicate that the public is giving up on getting through the form to apply. High call volumes at your call center may also be a signal that the form isn't guiding users on its own. Tune into the metrics of your services and you may very well find a form in need of redesign.

Paper versus digital

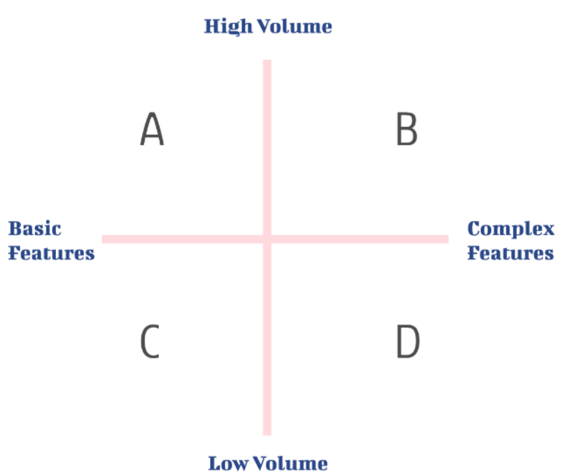
Why are we talking about paper forms in a digital age? We have a few reasons. First, paper may be what's available to you and your agency at this moment. Digitizing your form may not be an immediate option because of budget limitations or technological constraints. That's ok. A good paper form is better than a bad form, in any format. Your goal is to improve the user experience. You can get there incrementally.

Second, you may need a paper form even if you have a digital version. Some users may not be digitally literate. Others may lack internet access or simply prefer paper. Having both paper and digital formats might be part of your accessibility plan. If your form is already digital, that's great too! There is significant overlap in the design process for paper and digital. You'll see that reflected throughout this guide. Where they diverge, we make a point to note how they differ and how to design accordingly.

If you're transitioning your paper form to digital, you have some additional work to do. First, you'll need to choose a digital platform. For this consider the volume of form submissions you receive, the complexity of form features you'll need, and the level of data security necessary to protect what you collect. The chart on this page can help you think about which tool to choose.

- Group A - you could benefit from an off-the-shelf tool like Alchemer or SurveyMonkey that allows for a fair degree of customization, but doesn't have a built-in backend. This saves you money and build time. It can be linked to automatically feed submissions to a separate database to satisfy your volume needs.
- Group B – you could benefit from a tool that has a built-in database. This could be off-the-shelf, like Qualtrics or Salesforce, or a custom build.
- Group C - you could benefit from a basic, off-the-shelf tool like Microsoft forms or Google forms, which can be stood up fast, and may even be free.
- Group D - you could benefit from an off-the-shelf tool like Alchemer or SurveyMonkey that allows for a fair degree of customization, but that doesn't have a built-in backend. It will output csv files of submissions, which should satisfy your volume needs.

You'll have to weigh each of these against timeline, budget, data security, and existing tech infrastructure.



Volume
Low volume might be a hundred submissions a year and high volume a hundred per week.

Features
The most basic digital tool would have features like textbox questions and checkbox or radio buttons—a tool with no customization. A tool with more complex features would have the ability to upload files, apply skip logic and personalization, run scripts, and have broad flexibility for customization.

Anatomy of a healthy form

Makes clear who provides the service

DC Department of Fake Permitting

BIRD HOUSE BUILDING PERMIT APPLICATION

Clearly explains what the form is for

Use this form to apply for a permit to build a bird house.

BEFORE YOU BEGIN

Provides information about where to get human assistance if needed

All bird houses in the District of Columbia must meet several structural requirements:

- Be built out of wood, steel, or plastic;
- Be under 11 inches tall; and
- Include a DC flag.

You can find FAQs on our website forthebirds.dc.gov. If you have additional questions our team is here to help Monday-Friday, 9AM-5PM at 202-555-5555.

Uses headings to organize similar questions/ uses bold sparingly so it draws attention to the right places

APPLICANT

Full name

Mailing address | Unit | City | State | Zip

Phone number | Email address

BUILDING DETAILS

Bird house Square Suffix Lot (SSL)

Defines things inline rather than on a cover sheet or at the top

You can find your SSL using DC's MyTax Real Property Finder: https://mytax.dc.gov

Proposed square footage of the bird house

Uses conversational and plain language

What will your bird house be constructed of? ❑ Wood ❑ Steel ❑ Plastic

Will your bird house have feed? ❑ Yes ❑ No *(skip the next question)*

What kind of feed will your bird house have? ❑ Nuts ❑ Seeds ❑ Nectar ❑ Insects

Check all that apply.

Provides complete submission instructions

SUBMISSION INSTRUCTIONS

Please mail or drop-off (Monday-Friday, 9AM-5PM) this application form along with the items listed below to the DC Department of Fake Permitting, Attn: Division of Birds, 567 Walter Ave NW, Suite 24, WDC 20004:

- Drawing of your bird house plans
- $20 check payable to DC Treasurer
- Copy of your homeowner's insurance policy

Outlines what comes next in the process of getting service

WHAT COMES NEXT

In 5-7 business days our team will contact you over email with an approved permit, denial, or a request for additional information. Once you have an approved permit, you are free to begin construction. Your permit is good for 90 days.

Our steps for form design

Assemble your team

Form design is best done as a team. Ideally this group is about three to five people that work in different corners of the service your form represents. You'll consult and pull in other staff throughout the process, but keeping this core group small will ensure a sense of ownership amongst the members and help you keep moving. We have found that having a combination of front-line staff, program staff, legal, and (if working on a digital form) IT staff, make for a strong team.

YOUR CORE TEAM

Front line staff – these are the people at your front desk or in your call center. They interact daily with the public. They know the common questions users have and the pitfalls they experience.

Program staff – these are the people who hold the service delivery goals in mind and are the policy experts. At the management level, they are aware of the organizational structure and how employees work together at different levels to deliver the service. They are also the decision-makers about how the service, and its accompanying form, are delivered.

Legal staff – these are the people who know the regulations that govern the service. Often, their approval is required before a form can be released to the public.

IT staff (if a digital form) – these are the people who know what's technically possible with the systems that underpin your form and the service delivery itself. They know how the form's submissions interact with the backend systems.

The benefit of assembling this team is not just that you'll bring broad expertise together, but also that you'll create broad organizational buy-in for the new form and/or process when you eventually roll it out.

Identify your users

Before you start, it's helpful to have an idea of who is using your service, and therefore, your form. Of course, there isn't just one type of user—there are many. Rather than trying to craft a series of personas or profiles to capture the full spectrum of needs, we recommend thinking about what is true for most of your users (roughly 75%), some of your users (roughly 20%), and a few of your users (less than 5%). Often we design to the needs of "most" users, and as the definition indicates, that will work for most. But we need to also consider what will be true for "some" and "a few" because if we don't, the form is likely to poorly serve the most vulnerable.

Notebook page 29 provides instructions for both identifying what's true about your users and translating those needs into responsive form design. Your form may not solve all the user needs you identify, but you'll be able to make informed decisions about what to account for in the form and what you'll need to address with supports outside your form.

EXAMPLE FROM THE FIELD
Roughly 50,000 students are enrolled in DC Public Schools (DCPS)—and each student must complete enrollment forms every year to attend. If we think about what is true of 75%, 20%, and less than 5% of form users on just three questions, it unlocks a wealth of information about how we design the enrollment form (see table below).

The table gives us the following ideas for the school enrollment packet's design:

- The person completing the form is usually a parent or guardian, not the person receiving the service. But sometimes that person is, like an adult student. So use specific field labels (e.g. "student name" and "parent/guardian name" instead of "name") to make clear whose information is being requested. Also use inclusive language like "student," that spans age groups instead of terms like "your child" or "kid."
- Distinguish between home address and mailing address. Allow people to indicate that they are experiencing homelessness.
- You may also need to consider alternatives to your form. In the case of minors in foster care (less than 1% of DC children), their needs may be unique enough that the form design won't properly serve them while serving the rest of the population. In this case, we should think about alternative ways to serve them (e.g. a partnership between DCPS and Child Family Services to enroll minors without forms).

Sample questions about your users

Question	75% of users	20% of users	≤ 5% of users
Who will fill out the form?	Parent	Guardian	Foster care caseworker Emancipated minor
Who will use the service that the form unlocks?	PreK3-12th grade students	Students with IEPs	Adult students
Do users in this group have a consistent home address?	Yes	Yes	No

Process map your service

Forms are the front door to services. We cannot design a good form without orienting around the service it unlocks. We need to understand what precedes and what follows the form. To do that, we process map. A process map illustrates, in great detail, the steps a resident takes to go from expressing a need to successfully addressing it—the end-to-end experience. Check out notebook page 30 for instructions on how to create a process map.

When you have a complete map, it will show you both where your form fits into the larger process and will help you write a better form that offers context and complete instructions to those who fill it out. A bonus of process mapping is that it can also help you locate pain points beyond the ones in the form and resolve them. If you're designing a new form, you'll need to approach process mapping differently. Since you are not documenting what *is* happening, your goal in this step will be to chart out what *should* happen for an ideal user experience.

EXAMPLE FROM THE FIELD

Accessible applications for those with mobility limitations

In DC, residents with mobility limitations can request that street parking be reserved for them in front of their home. The Lab process mapped the resident experience and together with the Department of Transportation (DDOT), we realized that applicants had to go to their doctor to complete a medical form, take that to the Department of Motor Vehicle (DMV) to apply for a disability parking placard, then take a new medical form to their doctor again, complete DDOT's application, take that to be notarized, and then bring the application to DDOT for submission. That was five in-person trips for someone with limited mobility. The map helped us see that was too many trips and think about where and how we could minimize them. We standardized the two medical forms so there was just one trip to the doctor, we removed the notarization requirement, and we allowed people to mail or email their application to DDOT. Five trips became two.

Simplifying dietary accommodations for students

When redesigning the DC Public Schools' (DCPS) enrollment packet, there were three forms related to a student's dietary needs–the Fluid Milk Substitution Form, the Medical Statement for Dietary Accommodations, and the Philosophical/Religious Dietary Restrictions Form. The process map revealed that parents often used the wrong form or missed one of the three, which resulted in more administrative work for the DCPS team. From there we decided together to combine them into just one form for dietary accommodation. Parents could feel more at ease knowing that their student's complete dietary plan was recorded in a single place and school staff had less paperwork to track.

Assess your form

The goal of this stage is to learn whether the form you are redesigning is (or isn't)…

- Readable – is the form free of jargon and written at no higher than an 8^{th} grade reading level?
- Accessible –Is the digital form 508 compliant? Is the form accessible for people with low-vision?
- Logical– does the order of information and questions in the form make sense? Is it possible for people to skip questions or sections if they are not relevant?
- Achieving comprehension – are the form's instructions and questions easy to understand?
- Complete – does the form provide the necessary information and context for the person completing the form? Does the form make clear how to successfully submit it? Does the form provide contact information if the user has questions or needs assistance?
- Free of redundancy – does the form ask for information just once?

Notebook page 32 will walk you through an assessment. Very quickly, you'll have a rich inventory of the form's pain points, missing elements, redundancies, and core needs. Once everyone has done their independent assessments come together to go through the form line by line. Page 33 has instructions for running this meeting.

If you are designing a completely new form, then you won't be able to assess an existing one. Instead, we recommend using this step to list the information you'll need to gather from the person seeking your service. If the service has regulations underpinning it, be sure to reference those and learn what's required by law.

Once you have your list, consider—how can I gather each piece of information? For example, if your service is contingent on the household's income being under a threshold, you could ask for an itemized list of income sources with supporting documents. You could simply ask, "what is your annual household income" with a self-attestation that the information is accurate. You could ask if the applicant participates in other government means-tested programs (e.g. SNAP, TANF, Medicaid) and use that information as a proxy for income eligibility. There is more than one way to gather a single piece of information. Think about what will satisfy your needs and minimize the burden on your user.

Also consider, do you really need this piece of information? For example, you might need a phone number to be able to reach the applicant, but probably don't need a home, cell, and work number.

EXAMPLE FROM THE FIELD

When our team worked on the Disability Services Request Form, we had a conversation with the Department on Disability Services (DDS) during our form assessment that went something like this:

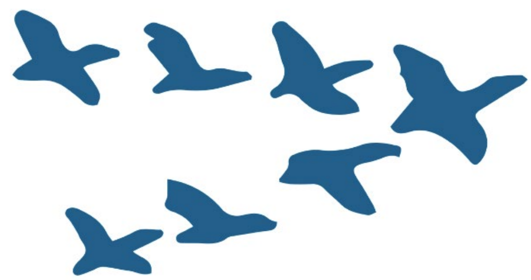
The Lab: "This section on income requests a lot of information. Is there an income threshold for receiving services?"

DDS: "No, services are provided for all income levels. We just ask the question so we can determine which budget line funds the service. If it's below $X, we can use federal funds. If it's above $X, we need to use local funds."

The Lab: "Would it be possible to ask about income after the applicant has been determined eligible for services? That way it limits the initial barrier of getting in touch with your staff."

DDS: "Sure. We meet in-person with every person and their caregiver once they've been deemed eligible, so our case managers could request that information at that point."

If we hadn't had this conversation, we likely would have left this lengthy section on the form under the assumption that income was criteria for eligibility. When we knew it wasn't, we were able to remove it and reduce the time burden on those filling out this initial application.



Observe your service

If your form's service is something that can be observed, go observe it. Seeing the service—and possibly the form itself—in action will inevitably reveal new pieces of information about the user experience that you can use in your design. It humanizes your end-product and demonstrates to your frontline staff that you are committed to designing something that works for the people on both sides of the form. Page 35 of the Notebook offers space and prompts to log your observations.

EXAMPLE FROM THE FIELD

When The Lab worked on the driver's license application we started by printing a PDF copy of the form from the DMV's website. We saw that there was a question asking if the applicant also wanted to register to vote—information that the DMV would pass along to the Board of Elections (BOE) if the answer was, "yes."

But it wasn't until we went to the DMV that we realized *how* that information was shared with BOE. We had assumed it was typed into a database and digitally sent to them. Not so. When we physically picked up a copy of the driver's license application we saw that it was printed on carbon paper so that when an applicant writes their name and contact information on the DMV form it transfers onto the sheet underneath—the BOE form. That sheet was then torn off and physically passed to the BOE.

This meant that if we moved the contact information section on the driver's license application, then we'd also have to change the voter registration form—we didn't have permission to do that. Observing in person how the form got used at the DMV helped us better understand our design constraints.

Where to observe your service and its form

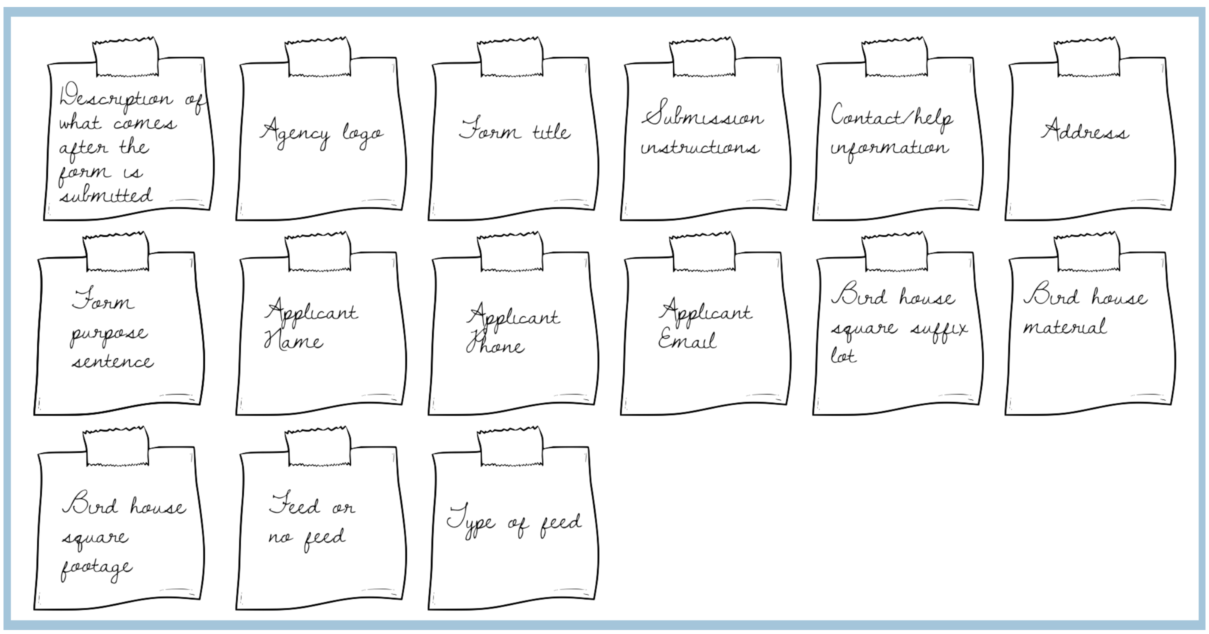
For example, if you are working on…	Then…
Driver's license application	Visit the DMV road test and service center
Certificate of occupancy application	Go to the permitting and licensing service center or an onsite inspection
Government employee health insurance forms	Attend a new staff orientation session

Draft your form

You now have a wealth of information about your service and its form. Think of the content in your notebook (i.e. user identities, process map, form assessment, and observation notes) as the building blocks from which you'll assemble a new form. It's a subtle distinction, but you are not *editing* the existing form so much as you are building a new, better one. Throughout this section, we'll walk through the drafting process sequentially. Most advice here is applicable to both paper and digital forms, but there are some points of divergence. We'll call those out and how to handle each as they come up.

Content

Regardless of whether you are redesigning a paper form or a digital one, start by creating a list of the information you need to share with your user (refer to Anatomy of a Good Form on page 11) and the information you need to collect from them. There will be elements you can lift from the old form and others that will be new. It's ok at this stage for the elements to be placeholders (e.g. "brief overview of the form" versus the actual sentences that comprise it). Don't get caught up in the precise wording of things just yet. Put each element on its own piece of paper, lay them out on a table, and step back. What pieces should be grouped together? What information should be shared first, in the middle, at the end? What can you make optional based on prior questions? Try out different configurations until you reach something that feels right for your first draft. You now have your form's skeleton.



Skip Logic

When you're sequencing the form's elements, think about what questions or pieces of information can be skipped given a previous answer. For example:

1-Will your bird house have feed?

- ❑ Yes
- ❑ No

2-What kind of feed will your bird house have? *Check all that apply.*

- ❑ Seeds
- ❑ Nuts
- ❑ Nectar
- ❑ Insects

If you answer "no" to question one, question two is irrelevant. In a digital form, you can easily code things so that the user who answers "no" never sees question two. This not only makes it faster to move through the form but also avoids confusion. On paper this is harder to achieve, but not impossible. For example, you can add help text to question one:

1-Will your bird house have feed?

- ❑ Yes
- ❑ No *(skip to question 3)*

Plain language

You have drafted the elements of your form and thought about how to organize them. Now think about the wording of each of those elements. You want your language to be plain. The International Plain Language Federation says, "a communication is in plain language if its wording, structure, and design are so clear that the intended readers can easily find what they need, understand what they find, and use that information."

In the U.S., 21% of adults have low English literacy skills—a level of one or below on a five-point scale and 43% of that group are adults born outside the U.S., presumably non-native English speakers (National Center for Education Statistics). Writing plainly is imperative to ensure accessibility.

To help guide you, check out the Federal Plain Language Guidelines for a wealth of recommendations. A few tips we would highlight are provided in the table on the next page.

Once you have language drafted, consider using a readability checker (e.g. the Hemingway Editor) and aim for an 8^{th} grade reading level. That said, readability checkers are designed for paragraphs of text, not discrete words and phrases. This means you won't be able to feed your whole form into a checker, but you can test out sections where you have sentences (e.g. instructions, disclosures, and consents).

You'll also find that plain language practices go hand-in-hand with some of the tips suggested in the upcoming Graphic Design section.

Plain Language Tips

Tip	Don't say	Say
Use active voice	**The applicant** must provide his or her mailing address.	Please provide your mailing address.
Don't overshare your agency org chart	Submit your application to the Division of Birds within the Office of Customer Service at the Department of Fake Permitting by emailing bird@dc.gov.	Email your application to birds@dc.gov.
Use accessible labels	The **Committee on Avian Wildlife** will review your application.	Our **committee** will review your application.
Avoid double negatives	**No approval** of any bird feed will be granted **in the absence** of an ingredients list.	Please include an ingredients list to have your bird feed approved.
Break information into short sentences and use lists	DC's bird house construction rules require that the structure be built from wood, steel or plastic, be under 11 inches tall, and include a DC flag.	DC has rules for your bird house construction. It must: • be built out of wood, steel, or plastic; • be under 11 inches tall; and • include a DC flag.
Omit unnecessary words	**On an annual basis**, file your safety report.	Please file your safety report **annually**.
Avoid legal, technical jargon	The plans for the **avian domicile** shall be submitted with an **enclosed** application.	You must **submit** your bird **house** plans and application together.
Be friendly and use "please" (it's the nice thing to do)	Tell us why you need a bird house on your property.	**Please share** why you are interested in installing a bird house on your property.

Graphic design

At this stage, you have all the elements for your form. Now it's time to construct it in its polished format. It's tempting to think this step is about making your form "look pretty," but it's more than aesthetics. It's part of how you effectively communicate information in your form.

If you're designing a digital form, refer to Paper versus Digital on page 9 about which tool to use. If you're designing a paper form, we recommend Microsoft Word. While software like Adobe InDesign provides a wider suite of tools, Word is something that nearly all government employees have licenses to and familiarity. That means that whoever needs to update the form next, will very likely have the skills and access to make updates.

This is also a good time to reference your agency's style guide to know what parameters you have with things like colors and fonts.

We are not experts in graphic design, but have benefited from the guidance of resources like the Federal Plain Language Guidelines, Digital.gov, and Figma. Below we highlight a few tips for strategic layout and design that apply to both digital and paper forms. You can see some of these in action on page 11, the Anatomy of a Healthy Form.

- Organize the page with informative headings.
- Use bullets to help the user quickly digest information.
- Use tables, illustrations, or diagrams when they can convey information more effectively than words.
- Use bold, underline, and caps sparingly so it focuses attention where attention is needed most.
- Use color sparingly and strategically to signal meaning.
- Use white space to make your form appealing to look at and easy to understand.

If your form is paper, be sure to print a copy and check for the following:

- Is there enough room for you to hand write your information?
- Look at your form from several feet away. Where are your eyes drawn to on the page? Is that where you want the user to focus first?
- Does the amount of text feel overwhelming?
- Do any sections break awkwardly from one page onto the next?

Accessibility

We've drawn from the guidance of Section508.gov, Accessible Web, and the A11y Project as we think about making our forms accessible. Some things to keep in mind for both paper and digital forms:

- Ensure that your use of color works for low-vision users. You can test your color contrast on Accessible Web.
- Ensure that your font types and sizes are readable for low-vision users.
- Use plain language and remove idioms, metaphors, or figures of speech. These are challenging for non-native readers, and they make your material harder to translate successfully whether you use a human translator or technology (US Digital Response has a promising toolkit that uses AI for translations). If you are using a human translator, fill in the Language Translation sheet on page 36 and provide it to your translator—we've found this a successful way to get higher quality translations.

For digital forms specifically:

- Use alt text to label visuals so screen-readers—assistive technology that reads aloud what's on the screen for people with visual-impairments—can accurately describe the image.
- Use heading elements (e.g. h1, h2, h3, normal) in a logical hierarchy so screen-readers can move through the form in the order the information should be read.
- Make translations accessible with the click of a button so users can navigate through your form in the language of their choice.

User test your form

Your form only works if users can easily navigate and correctly complete it on their own. The best way to find out is to test it with actual users. One-on-one observational studies are particularly helpful because they both identify *where* users are making mistakes and help you uncover *why*. To be clear, this process is distinct from running a focus group or gathering survey feedback about your form. We're not concerned with what people *think* about the form. We want to know what actually happens when they use it.

A word of warning. It's tempting as the designer to get annoyed during this phase. You've invested many hours in thinking about your form and revising it. This prototype is your masterpiece… and the user isn't using it right! Humans are not machines. They don't always behave logically. They will be impatient. They will be distracted. They will not have full-knowledge of your agency and your service. Your form must accommodate the user's reality.

Where to test

You want to test the form the way it will be used. If it's a paper form, test with paper. If it's a digital form, test on a computer or mobile phone. For paper, that demands in-person testing. For digital, it depends. If it's important to see someone use the form on mobile, you probably want to be in-person so you can look over their shoulder as they navigate. If you think the form is likely completed on desktop, then either will work (with the assist of screensharing for a virtual test). If you are testing in-person, be sure to have the necessary materials on-hand (e.g. the paper form, clipboard, pens or the form's link, a computer/mobile phone).

Who to test with

Test the form with individuals who are likely to use it in daily life (e.g. if it's a school enrollment form, ask parents to fill it out). Remember to test not just with the majority of your users—the 75%—but also the users that represent "some" or "a few" (refer back to page 14). Conduct user testing individually so users don't influence one another with their comments. Test until you don't hear anything new from users. This probably will occur after five to ten tests; it may take more. The point is this: collect feedback, revise, collect feedback again, revise, etc. until you feel you've reached its most functional version.

How to test

If you can step outside and approach users on-the-spot, that's the fastest way to conduct your user testing. Sometimes your user is in a natural location (e.g. if testing the school enrollment form, you're likely to find parents outside an elementary school at drop-off/pick-up time). Other times, you may need to recruit users in advance and arrange a time to meet. In these cases, we often rely on community organizations as trusted messengers to connect us to people (e.g. a senior center if we need to test with older adults).

When you sit down with a user, follow the sample script on page 37 to introduce the activity and orient the user. As you begin, keep in mind what you should be observing:

- How the person answers the form's questions
- The way in which the person carries out the task
- Facial expressions and other mannerisms that might indicate problems, frustration, lack of understanding, confusion, etc.
- How quickly or slowly the person moves through sections
- What the person narrates

Refrain from providing directions or correcting a user as they complete the form. The form needs to stand on its own, so let a user struggle with a section if that naturally occurs. Ask the user to think aloud as they move through the form, as if to narrate their stream of consciousness. Jot down notes as the user is working to help you remember their reactions and pain points. You may find it helpful to have a copy of the form in front of you to take notes on top of as the user moves through the form.

EXAMPLE FROM THE FIELD

When The Lab redesigned the DC driver's license application, we headed to a DMV waiting room with copies of our prototype and approached users to fill it out (see before user testing image below). During one of the first engagements, a user moved slowly through the first few lines of the medical history section and checked "no" for each item. Then he sped up and checked "no" for the rest. He was wearing glasses so I asked, "do you wear those glasses to drive?" "Yes," he said after just having checked "no."

This pattern repeated with a few other users who had simply seen "Alzheimer's Disease" and "Diabetes" at the top of the list and said to themselves, "I don't have any medical conditions, so I don't need to read each one. I'll just check 'no' down the list." After completing this test, we reordered the questions with more common medical issues listed first to help avoid this error (see the before and after of the form below).

BEFORE USER TESTING

Tell us about your medical history

Alzheimer's disease	☐ Yes	☐ No
Insulin dependent diabetes	☐ Yes	☐ No
Glaucoma, cataracts, or eye diseases	☐ Yes	☐ No
Seizure or loss of consciousness	☐ Yes	☐ No
Do you have other mental or physical conditions that would impair your ability to drive?	☐ Yes	☐ No
Do you require corrective lenses or glasses for the vision screening test?	☐ Yes	☐ No
Are you required to wear a hearing device while driving?	☐ Yes	☐ No

AFTER USER TESTING

Tell us about your medical history

Do you require corrective lenses or glasses for the vision screening test?	☐ Yes	☐ No
Are you required to wear a hearing device while driving?	☐ Yes	☐ No
Alzheimer's disease	☐ Yes	☐ No
Insulin dependent diabetes	☐ Yes	☐ No
Glaucoma, cataracts, or eye diseases	☐ Yes	☐ No
Seizure or loss of consciousness	☐ Yes	☐ No
Do you have other mental or physical conditions that would impair your ability to drive?	☐ Yes	☐ No

Beta test your form

If you are designing a digital form, you have the opportunity to run a beta test after user testing. We highly recommend this. While user testing helps you identify potential pain points with *hypothetical* users, beta testing is making your form live for use by *actual* users. That gives you richer feedback to further refine your design.

A beta period can be as little as a few days and as long as a few months. It really depends on the volume of form submissions you receive—you need enough to identify user patterns—and what is administratively feasible.

To start, make your form live for users, but don't advertise its launch—a soft launch. In the same way a new restaurant has a few practice nights to work out the kinks before their grand opening, you are giving your form a chance to fine tune. During this beta period, it's important that you closely monitor form submissions. Look for trends in the data. What are the common errors you're seeing? These are what you want to fix before your publicized launch.

EXAMPLE FROM THE FIELD

In Summer 2024, DC along with more than 30 U.S. states launched a new public benefit for students - SUN Bucks (Summer EBT). The program provided each eligible student with a $120 benefit card to buy groceries to brige the summer hunger gap. The Lab took the lead on developing the digital application form.

Two days before the official launch of the application, we quietly made the form live online and received several hundred application submissions. In near real time, we closely monitored the data coming in to see how the application was and wasn't working.

One thing that stood out–about 5% of applicants were listing their household members and failing to mark anyone as a student. But being a student is what makes you eligible for SUN Bucks. We were confident these applications were the result of a typo, not a misunderstanding of who the program was for, so we added a warning message to appear if an applicant didn't mark any students in their household: "*You told us there are no students in your household. Only DC students are eligible for Sun Bucks. If you made a mistake on the previous page, please click the blue back button and edit your response. If you have no DC students in your household, you can quit the application.*"

After this tweak the error rate fell from 5.5% to 1%. Over the course of the three-month program, this single warning message saved 630 families from being denied benefits because they missed the place to mark their student(s).

BETA IN PAPER

While you can run a beta with a paper form, it's logistically much harder and usually administratively infeasible—forms are printed en masse and distributed to multiple locations; data from completed forms has to be manually entered into a database making it hard to get aggregate feedback quickly.

Revisit your form

You're done! For now. It's important to keep in mind that forms are living documents. Their effectiveness hinges on responding to changes to the service and the needs of the people who access it. You'll have to decide what is an appropriate cadence, but consider revisiting your form in a year. You aren't restarting the full revision process, but you can lean on these same tools.

Identify your users—has anything changed about the people who use the service? If yes, are their needs being adequately met by the form? Consider your process map—has anything changed in the steps to access the service? If yes, how has that been reflected in the form? If you make changes to the form, don't forget to user test before you deploy an updated version.

Notebook

Identify your users

Use the questions below to identify what is true about 75% of your form's users, 20%, and 5% or less. We recommend using a combination of internally and externally available demographic data, as well as qualitative input from frontline staff. The questions listed here are neither exhaustive nor applicable in every scenario. This worksheet is meant to get you started with thinking about your user needs so you can design accordingly. It is formatted 11x17 for you to print and handwrite on.

If known, approximately how many people will fill out this form each year? _________________

Sample questions about your user groups	75% of users	20% of users	≤5% of users
Who will fill out the form?			
Who will use the service that the form unlocks?			
What is this group's reading level?			
What are the dominant languages spoken in this group's homes?			
How flexible are the work schedules of this group?			
Does this group have internet access, a laptop, or mobile phone?			
Does this group have a consistent home address?			
Does this group have access to their and their dependents' vital records?			
How comfortable is this group with technology?			
Does this group have unique vision, hearing, and mobility needs?			
How far do users in this group have to travel to gather supporting documentation or submit your form?			
How will this group's employer provide documentation of hours and wages?			
Does this group have someone who can support them submit the form, if needed?			
Does this group have care taking responsibilities that may compete for their time?			

Implications for the form's design

How to lead a process mapping session

Book about two hours and bring together the staff who are most intimately aware of the steps in accessing your service. This will likely be a larger group than your core form design team. If you can, we recommend doing this in person with a large whiteboard—there's just something about drawing the first draft by hand together that helps the process stay fluid. If you need to gather virtually, there are online whiteboarding tools like Miro, Mural, or FigJam that will work well.

Once everyone is in the room, designate a lead to draw and a lead to ask questions. It helps if the Question Lead is someone who does not know too much about the service—they are free of the curse of knowledge! This will help them ask good questions.

The Drawer is the person who is illustrating the process in something like a flow chart.

The Question Lead is the person who keeps asking the Service Matter Experts incremental questions about the process. They should start by asking something like, "how does someone let you know they need your service?" From there, they should keep asking variations of, "what happens next" and "what if that goes wrong?"

WHO IS IN THE ROOM?

- Service Matter Experts
- Question Lead
- Drawer

WHAT TOOLS DO YOU NEED?

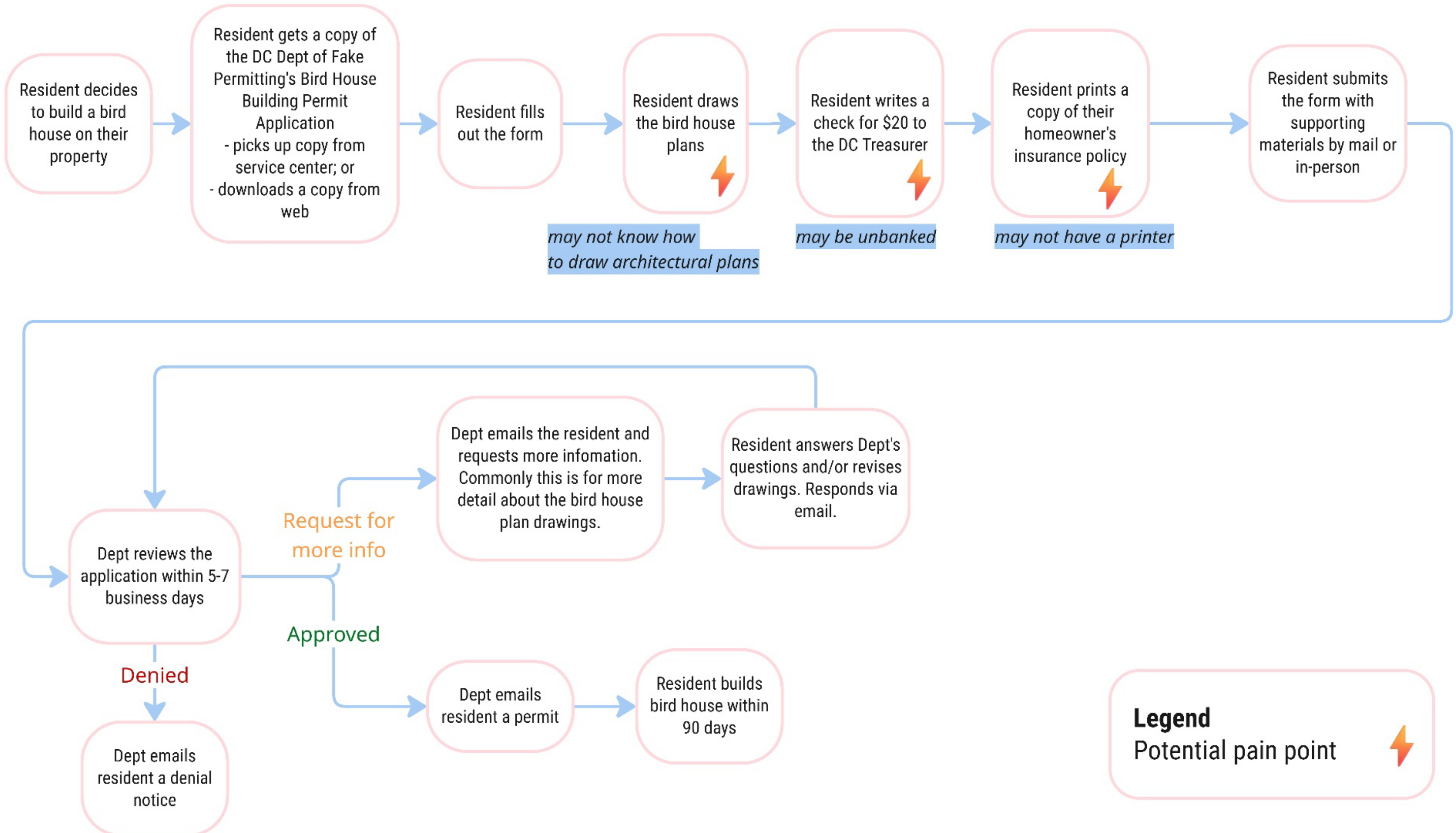
- Whiteboard and markers (if mapping in person)
- Digital flow chart tool (to clean-up your whiteboard drawing afterward)

HOW LONG DOES THIS TAKE?

Two hours is the average, but for complex services, it can take longer.

The goal here is to produce a flow chart that shows not just how to access the service if everything goes "right," but to also illustrate what happens when it doesn't. When you're done with the session, designate someone to clean-up and digitize your map. Share it back around with the group to make sure everything is accurately captured. Then consider where there are pain points in the process. Mark those on your map and engage with the appropriate decisionmakers on if and how you can alleviate them. You can see an example on the next page.

Process Map | How to applying for bird house building permit



Assessing your form

To start, print out your form. This is laborious for a digital form (you often have to use your browser's "Print Screen" or a snipping tool), but we recommend it because it's easier to reference and mark-up. Then read through the form and try tackling these questions. This sheet is formatted 11x17 for you to print and handwrite on.

Question	Answer
Is the form clearly named/labeled at the top?	
Is it clear whose form this is (i.e. which government agency provides the service the form is for)?	
What words or phrases are jargony?	
For any longer sections of text like legal disclosures or instructions, are they at or below an 8th grade reading level? *You can use a readability checkers, like the Hemingway Editor.*	
Is the form available in the languages most requested by your users and/or does it reference, in non-English languages, how a user would get assistance in their language?	
If the form is digital, does it pass a 508 compliance check? If not, what needs to be fixed? *You can use a 508 compliance checklist, like The A11Y Project's.*	
Are there any images or colors used in your form? If yes, are they visually accessible for someone who is color-blind or has low-vision? *You can use a contrast checker, like Accessible Web.*	
Particularly for paper forms, what size is your smallest font? Is it accessible for someone with low-vision?	
If the form is digital, is it mobile-friendly?	
Are there any questions that you are unsure how to answer? If yes, which ones?	
Are there any questions that you find invasive or rude? If yes, which ones?	
Are there any instructions that you find dismissive or rude? If yes, which ones?	
What information is requested more than once across the form?	
What information is shared more than once across the form?	
Is it clear how to submit the form?	
Is it clear what will come next once you submit the form (i.e. how and when you'll hear back about your application)?	
Is it clear how to get in touch with a human if you need help or have questions?	
Are there questions asked that are not applicable to some users? If yes, which ones?	
Does the ordering of information and questions make sense? If not, how would you order them?	

How to lead a form assessment meeting

Once everyone has individually completed their form assessment, we find it helpful to hold a meeting to go through the observations together. Set the duration of your meeting between two and three hours based on your form's length. These are mentally taxing meetings, so if more than three hours is needed, we recommend scheduling multiple sessions.

There are several key roles you'll want to staff during the meeting. Many of these you can be filled by your core form design team. The table below details the roles, responsibilities, and characteristics that make someone a good fit for each role.

Key roles for a form assessment meeting

Role	Responsibility	Who to choose
Meeting facilitator	Leads the group through the agenda; asks questions and facilitates discussion.	Ideally this is someone from another corner of government (i.e. someone not familiar with the service/form).
Notetaker	Documents what is discussed, decided, and needs follow-up.	Someone who is detailed oriented and a good listener.
Legal expert	Fields questions about what is/isn't required by the regulations governing the service/agency/jurisdiction.	Someone from the general counsel team, ideally the legal expert on your core form team.
Service expert	Fields questions about the program policy and service operations.	Program staff and frontline staff who know the program policy and/or interact with the public using the service, ideally those who are part of your core form team.
Technology expert (if digital form)	Fields questions about the technology (front and backend) that supports the form and the data it gathers.	Someone who knows what's technically possible with the systems that underpin the form, ideally the technology expert who is part of your core form team.
Fresh eyes	Provides fresh perspective and asks the questions the experts are no longer able to, given their curse of knowledge.	Members of the public who might use the form and/or colleagues from another corner of government.

Agenda for a form assessment meeting

Time	Topic
10 mins	Introductions of people in the room and their roles
10 mins	Introduction of the meeting goals and questions from participants • Digest what was learned from the individual form assessments • Understand the form's pain points, missing elements, redundancies and core needs • Identify any information that still needs to be gathered before design can start
60 mins	Walk through each page sequentially. For each, the facilitator should ask variations of: • Fresh eyes, what confused you on this page? • Fresh eyes, what does X mean to you? • Service expert, why is this asked? …how is this data used? • Legal expert, is this legally required? …could we ask it another way? • Did anyone have other questions on this page?
30 mins	What is on your individual form assessments sheet that we haven't discussed?
10 mins	Recap what questions are outstanding – what do the experts in the room need to look-up and/or think more about?

Observation Notes

Date and time of observation:
Location:
What is the service?

What step(s) in the service request/delivery did you observe?

Who did you observe (i.e. role and demographics)?

What was the environment like? Quiet or loud? Empty or crowded? Friendly or uninviting? How long did people spend there?

What surprised you?

Other observations and ideas for the form's design

Guidance sheet for translators

The sheet is meant for you to customize with your specific instructions and form context and then share with the person the translating your form into another language.

Instructions

A few things to keep in mind as you translate:

- Maintain the formatting we have in the document. For example, keep font size, font type, font color, bold, and paragraph breaks.
- Maintain hyperlinks by applying the links to the corresponding section of translated text.
- If numbers are shown numerically (e.g. 4) please keep them that way. If numbers are spelled out (e.g. four) please spell them out.
- Refer to the key terms table below to ensure a clear translation.
- Follow guidance on proper nouns provided in the table on the next page.

Background

[Insert here some details about the service this form represents and who is eligible for the service. Give the translator some context.]

Tone

The language we are using in our application form is intentionally plain, friendly, and brief. We ask that you also use language that is simple and easy to understand. We know that many of the people completing this application read at approximately an 8^{th} grade reading level.

Key terms

There are several terms we use throughout the application form that have very specific meanings. To help with your translation, we've listed them here and provided definitions.

Key Term	Definition

<table>
<tr><th>Proper Noun</th><th>Instruction</th></tr>
<tr><td></td><td rowspan="5">Please translate the full program name where it is first used in the document, but maintain the English language acronym in paratheses. For example, Supplemental Security Income (SSI) could be translated into Spanish as "Seguridad de Ingreso Suplementario (SSI)" in the first use and then SSI in all subsequent uses.</td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td><td>Please do not translate these proper nouns.</td></tr>
</table>

How to user test

The following is an outline for how you should run a user test. It is meant to guide you and be customized. Not to be used as a script. Review your guide a few times before you go into user testing so you have a general sense of the flow, but don't worry about reciting it word-for-word. You want to have a conversational tone and make the person your testing with feel comfortable so you can have a genuine interaction with the form.

Welcome and thank the participant. Introduce yourself and identify who you work for.

State your ask, the time commitment, and any incentives you can offer. Something like, *"we're working to make it easier for residents to [access X service]. Today we'd like to test our new application form with you. It will take about 15 minutes, and we have a $20 gift card to offer as a thank you for your time."*

Offer instructions. Something like, *"here is the form. Please fill it out as you would if you were applying for this service. To the extent you're comfortable please use your real information as you fill out the form, but for anything sensitive (e.g. SSN), please make that up. The form will be shredded/deleted within a week of our test.*

We're intentionally not going to give you instructions as you go through the form. We want to see how well it guides you on its own. If you're comfortable, please talk out loud as you go. That will help us understand your thought process.

Whenever we test something like this, we like to remind people that we are testing our material, not you. If something isn't clear to you, that likely means it won't be to other people too—and we want to know that. So throughout this, please don't filter or holdback. Any questions before you get started?"

Run the test and as needed, ask probing questions throughout—something like, *"can I ask why you did XYZ? You look confused… what are you thinking?"*

Thank the participant for their time, ask if they have any questions, and provide any promised incentives.