

# The plain English guide to forms

Forms should be:

- ❖ easy to read;
- ❖ easy to understand; and
- ❖ easy to fill in.

## How do you make your form easy to read?

- ❖ Use a 'friendly' type size.

For most purposes, a type size of 12 point is ideal. If you are short of space, you may have to go down to 10 point — but no lower. If your readers are likely to have difficulties with their eyesight, go up to 14 point at least — as recommended by the Royal National Institute for the Blind. For headings, use a type size at least two points bigger than the main text.

- ❖ Use a 'friendly' font.

You can divide most fonts into two groups:

- serifs, which have pointed bits (serifs) like this; and
- sans serifs, which are plain, like this.

It is usually best to use a sans serif font, like Arial or Helvetica. Serifs, especially if they are too pronounced, can be distracting.

- ❖ Keep it simple.

- Don't be tempted to switch from font to font. Stick to one — or two at the most.
- Don't use capital letters for emphasis — use lower-case bold instead. Capital letters make words difficult to read, and they give the impression that you are SHOUTING!
- Don't use italics. The occasional word might be ok, but continuous italics are difficult to read.
- Don't underline — the lines are just unnecessary clutter.

- ❖ Use paper that is:

- matt rather than gloss, to avoid glare;
- white, or perhaps lightly tinted, with text that is black, or another dark colour, for contrast; and
- of good enough quality not to allow text from the following page to show through.

- ❖ Use plenty of white space, with generous margins and good spacing between sections.

For more detailed advice, see our guide to design and layout.

## How do you make your form easy to understand?

- ❖ Use everyday language.  
So: 'Should you determine to purchase your residence ... '  
becomes: 'If you decide to buy your own home ... '
- ❖ Avoid bureaucratic language.  
So: 'The Department shall advise the applicant should further particulars require to be furnished.'  
becomes: 'We will let you know if we need more information.'
- ❖ Avoid jargon.  
So: 'The HE142 should be returned to the CCD using the PPE.'  
becomes: 'Please send the enquiry form, HE142, to our Customer Care Department in the pre-paid envelope.'

Don't worry that the plain English version is longer. This happens sometimes if you explain things in full, rather than using confusing jargon.

- ❖ Make it personal.  
Use 'you' rather than, for instance, 'the applicant' or 'the customer'.  
Use 'we' rather than, for instance, 'the council' or 'the company'.

So: 'The applicant should enclose a copy of his or her birth certificate with the form.'

becomes: 'Please send a copy of your birth certificate with the form.'

And: 'When the council receives the form, it will ... '

becomes: 'When we receive your form, we will ... '

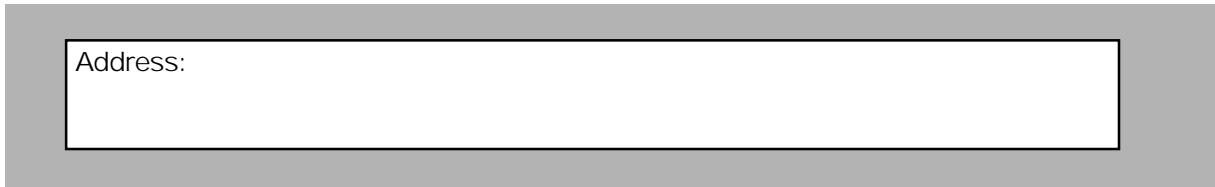
- ❖ Use active rather than passive verbs.  
So: 'The complaint will be considered when the form is received.'  
becomes: 'We will consider your complaint when we receive the form.'
- ❖ Use verbs rather than nouns.  
So: 'Prior to commencement of completion ... '  
becomes: 'Before you begin to fill the form in ... '

These are all topics that, among others, we look at in detail on our Plain English training courses.

## How do you make the form easy to fill in?

- ❖ Make space.  
Be sure to leave enough space for the answers you are asking for. There are few things more annoying than being asked to give your name and full address, with the postcode, on one line. And bear in mind that some people will have longer names than yours, so make sure they have enough space to write their name.
- ❖ Be logical.  
Ask for information in a logical order. Put important information, like who the form is for, at the beginning. Don't leave it two pages before explaining, for instance: 'If you are self-employed, this form is not for you. The self-employed form is SE47.'
- ❖ Follow a consistent pattern.  
Try to make sure that each page follows a pattern by using a grid. So, for instance, the first third of the page vertically can be for questions and explanatory notes, and the other two thirds for answers. In other words, the questions and the answer spaces line up horizontally. You may need to vary the pattern at times, but try to stick to the original logic as far as possible.
- ❖ In the same way, always start a new section by following a consistent pattern.
  - Always leave the same space before a new section begins.
  - Let the section heading run across the page to break up the vertical pattern.
  - Make sure there is more space above the heading than below it, so the heading is obviously attached to the section following it.
  - Use the same font size for all section headings.
  - If possible, start each new section on a new page.
- ❖ Give clear 'signpost' instructions.
  - If you number your sections, you can give clear instructions like, 'Now go to section 4.' You may decide to number your questions too — but don't overdo it, or you may end up saying, 'Now go to section 5, subsection 5A, question VII, part VIIIb.'
  - Make your numbering system as straightforward and logical as possible — and don't use Roman numerals.

- ❖ Make sure that people will know where to put their answers. A good way to do this is to use reversed-out (white) boxes on a tinted background, with the question in the same box as the space for the answer.



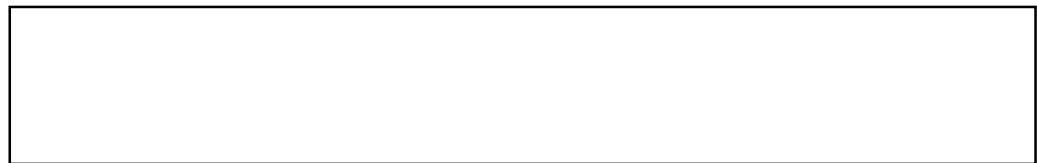
- ❖ If you want an answer of 'yes' or 'no', don't use 'yes/no - circle the right answer'. Instead use tick boxes like this.

Tick one box.            Yes                             No

- ❖ Don't use separate boxes for address and postcode. Instead use one box that says: 'Address and postcode'.

- ❖ If a question asks for a 'yes' or 'no' answer, and the person applying then has to write an explanation, make sure the space for the written answer is next to the relevant box. So, in this example, the tick boxes should be the other way round.

Do you receive any other benefits?    Yes     Please give details  
in the box below.  
No     Go to section 6.



- ❖ And finally, test your form. Ask someone, or preferably a group of people, to fill in the draft form. Make sure they are seeing it for the first time. If there are any trouble spots, they will soon become obvious.

Here is an example of a form that uses some of the design techniques we have mentioned.

This is part of an insurance claim form issued by Credit Life Insurance Management Co. Ltd. It has been reduced by 15%. The form has a prominent title and a clear introduction in bold type. The introduction provides a telephone number — an item omitted from many forms. The completion section uses the modern 'window box' technique in which the areas to be filled in are white against a coloured or grey background.

<b>Redundancy or unemployment claim form</b>	
<p>To make a claim, please complete sections A and B and ask your Department of Employment office to fill in section C. Please attach the original redundancy letter from your ex-employer, not a photocopy. Then return the form to CLIM Claims Centre, 3 Church Close, Andover, Hampshire SP10 1DP, telephone (0264) 51241. Remember to sign the form at question 17.</p>	
<p>For office use only</p> <p><b>R</b></p>	
<b>Section A</b> Please tick correct boxes	
<b>1 Title</b> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>	<b>2 First names</b>
<b>3 Surname</b>	
<b>4 Address</b> including postcode	
<b>5 Telephone</b>	<b>6 Date of birth</b> Day          Month          Year
<b>7 Employer's name and address</b>	
<b>8 What was your job?</b>	<b>9 On what date did you last work?</b> Day          Month          Year