Factors Influencing Form Design

**Consumer Characteristics**

*Who is completing the form?*
- What is their education level?
- Would they understand the terminology used, or should it be explained?
- What is their level of literacy?
- What language do they speak?
- Would they have any sort of disability? What kind?

**Historical Value**

*Will this need to be treated as an archival record?*
- How long must data last? 5 years, 10 years, permanently?
- How long will this format last? Should we consider acid-neutral archival paper?
- Is the form likely to be converted to microfilm? If so, there will be special design considerations (sans serif fonts and font size must be 12 point of higher).

**Transmission Method**

*How does the form get from the consumer to the user?*
- Hand delivery - affects size, type, and weight of paper
- Faxing - affects spacing fonts, and instructions
- Mail - affects envelopes, postage, paper size and weight, location of fields on the form
- Electronic - affects font, spacing, instructions, order of entry

**Processing Method**

*How will the form be processed?*
- By hand - must ensure the form will hold up to handling, that key data elements are easily recognized, and that there is space for stamps and approvals.
- Data entry - Variable data must be readable (the person entering the data must be able to read the data: Will you require people to type the form? Is there enough space for writing? etc.)
- Scanning - Vertical lines can be problematic in scanning, shading should be avoided unless it is used to block certain data, and sans serif fonts will increases the quality of the image and the accuracy of the character recognition.