

# Form Etiquette



## Ask the RIGHT Questions

- For each prompt, ask:
  - 1) **Why** do I need each prompt?
  - 2) **What** type of response(s) do I expect to gather?
  - 3) **How** will I handle the data I receive?

### Do we need the answer to this question?

- Yes — Leave it.
- No — Remove it.



## Keep It SECURE and Private

You cannot request or store Sensitive Personal Identifying Information (PII) on the GeorgiaGov Web Platform. If you need to store PII, you need to find a system that meets federal standards for storing sensitive data.

### Remove questions asking for any of the following:

- Social Security Number
- Date of Birth
- Driver's License Number
- Medical Information
- Any information that may stigmatize or adversely affect user.

### Not Sensitive PII but still needs some security restrictions?

- Use **Secure Webform** settings to submit data over SSL and restrict which employees can view and download data.



## Make Forms USABLE

- Use as **few** questions as possible.
- Clarify questions with **tooltips** or **descriptions**.
- Group similar groups of questions with **Fieldsets**.
- Use **labels** and **field keys** for each field.
  - When asking for a name, the field key should be "Name."
- Mark **required** fields.
- Match **field type** to the type of information I need.
  - Set field as mail, phone number, date and not just "text input."
- Use **select lists** when the number of possible answers is limited.
  - **Radio buttons**: User selects 1. Options are visible.
  - **Check boxes**: User can select more than 1. Options are visible.
  - **Dropdown lists**: User select 1, and the list of options is long (such as U.S. states, countries, etc.).
- Test to confirm can be completed using **only a keyboard**.



## Be CONSIDERATE

### Recognize emotionally sensitive information.

- In the description or tooltip, I explain:
  - **Why** I need it.
  - **Who** will use it.
  - **How** it will be used.
- **Gender** and **marital status** have options for "Other" or "Custom."
- **Ethnicity** or **race** have options for "other" or let you select multiple fields.
- Tread lightly on questions that may be more complicated than you think: family and relationships, education, employment.