

# Accessible Form Creation CNIB Guidelines

## Version History

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## Introduction

In working with service-users with diverse abilities, CNIB has outlined a series of guidelines for data development and collection for Forms. Be prepared to spend extra time in creating these documents as the design will heavily determine the document's accessibility. Some of these guidelines require basic knowledge around accessible documents in Word and being able to create an accessible PDF document.

All forms have specific requirements for the collection of information that relates to privacy laws or legislations, digital platforms as well as inclusive design principles. Creating an accessible form requires understanding a user-centric approach for both front-end and back-end. This means that a person with a disability will be able to interact with the information as a potential creator, consumer, and administrator. In other words, both the form and the process must be accessible for all employees irrespective of disability or other accessibility needs.

## Inclusive Design

Inclusive design ensures that information must be consumable for a wide range of human abilities. Information can be engaged with, represented and processed through multiple modalities (visual, auditory, written, etc.). Part of this process incorporates how all persons consume and work with the information obtained via any CNIB generated form.

Consider that a blind colleague in the future may come to inherit your form and they must also be able to use and process the information, without having to retrofit or create a new document or process. Any form must promote and respect the dignity and human rights of all persons interfacing with the organization,

irrespective of disability. Using inclusive design in your forms means that you are also indirectly future proofing your work.

### **General Recommendations**

1. Provide a clear and concise overview, what materials and information is needed to complete the form.
2. Provide contact details for someone who may be able to help fill-in the form or in case of questions (name, email and phone number who must be reachable).
3. Use simple and plain language. If specialized language is used, a glossary/terminology list can be provided.
4. Provide clear submission guidelines/requirements.
5. Create alternative text for visual elements or mark as decorative.
6. Explain why this information is going to be collected, how it is stored, protected, and who will have access to the information.
7. Provide data validation both for incorrect and correct data input if these features are available in your platform of choice.
8. Prepare an alternate-format version based on the needs of the users (Word, PDF, paper copy, via intervenor, etc.).
9. Run accessibility checker where applicable.
10. Have the document tested for accessibility before going live.

### **Layout and Design**

1. Make sure that you group sections and questions together in a logical order and based on theme.
2. Use document headings to help with creating structure in the same manner you organize a word document.
3. Ensure required fields are visible and clearly marked or distinguishable.
4. Use a large sans serif font across the entire form (instructions, questions, response and text fields are minimum 14-point font size, such as Arial).
5. Use colour and contrast consistently across the form. Ensure that colour is not the only means of conveying information.

## **Form Fields**

1. Make sure all form fields are labelled correctly.
2. Provide real-life examples to help with input (For example asking for present, please enter 03/25/2019 etc.). User should never guess how to input information.
3. Checkboxes are used for multiple selections and must match the size of text. Checkboxes must have a tooltip and label to explain the response so that users can understand the purpose. Ensure that the checkbox is the same size at the font you are using.
4. List box/dropdown box can be used for larger selections of only one option (such as Province or Country). Often users can simply enter the first letter or desired number and it can be faster to input data. Large selection also protects against user-input errors.
5. Radio Buttons can be used if you require a simple binary question (yes/no). This may not be available in all platforms.
6. Text fields or text boxes must be specified but remain at the same size. Text fields in Word can be problematic to manipulate and being consistent and providing enough contrast is essential. Use a single line for a single sentence response but increase the text box size if users write responses to help with editing at least 3 lines of text should be visible. Tooltips are also helpful.

## **Signature Requirements**

1. Written digital signatures must be defined in specific field. This must be explained and an outline for alternate solution provided if possible.
2. Alternative signature methods such as a signature stamp, checkmark or other mark indicating an intent to sign may require to be performed in observation from a witness. The witness may need to provide their signature and date on the item.
3. If you offer to use initials as a substitute, a written disclaimer must be noted and an alternate method to verify an individual's identity or attestation must be included and documented.

**Vulnerable Populations:**

- Provide a space for signature for legal guardian or power of attorney or other legal representative's agreement. Follow provincial legal guidelines as required and provide supplementary documentation to prove the agreement as required by law.

**Accessibility Note:**

Digital signatures currently are not fully accessible (Microsoft and PDF digital signatures instructions and certificates). The issue has been flagged to these providers and alternate solutions must be considered.

**PDF Form Restrictions**

If you create a portable document format (PDF) file, you will be responsible to render that form accessible upon intake from the public or other stakeholders. This means having access to software to help with remediation or software able to perform optical character recognition (OCR). If you do not have access to such software, you must address this access before sending out a PDF form.

**Current Platforms Available for CNIB staff:**

1. Microsoft Word – internal/external
2. Microsoft Forms – online tool – internal only
3. PDF Form – internal/external
4. Salesforce – specific departments only.
5. SharePoint – internal only; must be requested and built with IT.

**Errors to Avoid**

- Using a table to structure the formatting of your form.
- Reading order is not defined or file is missing headings and tags (PDF document).
- Varying the colour and font and font size in your form fields.
- Relying only on one form for input.
- Using the wrong form field and not labelling your form fields or providing tooltips.

- Missing instructions for the user and not providing clarification for technical or specific terminology
- Focusing on your information needs first rather than the end-user.